



**FIVE YEAR STRATEGIC PLAN
2024 – 2028**

Prepared: Fall 2022, updated Spring 2023

Table of Contents

- 5-Year Strategic Plan 2**
- Our Vision & Mission 5**
- SWOT Analysis 9**
- Our Brand.....11**
- Target Audience & Markets.....13**
- Management, Governance, and Administration15**
- Sources of Funding15**
- Five-Year Goals16**
- Strategic Pillars17**
- Pillar 1: Engagement18**
- Pillar 2: Community Building20**
- Pillar 3: Organizational Sustainability.....22**
- Summary.....24**

5-Year Strategic Plan

Designated Recipient: Discover Naramata Community & Business Society ("Discover Naramata")

Designated Accommodation Area: that part of the Regional District of Okanagan-Similkameen, consisting of Naramata and Electoral Area E

Community Name: Naramata

Date Prepared: Fall 2022, updated Spring 2023

MRDT Date Submitted: April 17, 2023

Proposed MRDT Rate of Tax: 3%

MRDT Term Expiry Date: **Repeal Date is the end of the five-year term of the tax

Five Year Period: 2023-2027

INTRODUCTION

Discover Naramata focuses on tourism to market the destination, attract visitors and to provide information. The role of the DMO (Destination Marketing Organization) has expanded to include community and stakeholder relations as well as creating advocates for tourism (ie: regional partners or local tourism businesses). This wider concept of destination management encompasses much more than economic growth or business revenue – developing outstanding industry partnerships, promoting best practice policies, and overall continuing the transition to destination stewardship to enhance the Naramata community as a desirable place to live, work and play.

With the recent rebrand completed, it is an opportune time to develop Discover Naramata's first strategic plan. The core and purpose of the organization has been strengthened and is ready for the challenges and opportunities over the coming years. This 5-year strategic plan was developed to set the foundation for Discover Naramata moving forward to a sustainable future.

All recommendations presented in this strategy were reviewed through the lens of the capacity of Discover Naramata to successfully develop and execute on.

Stakeholder Engagement

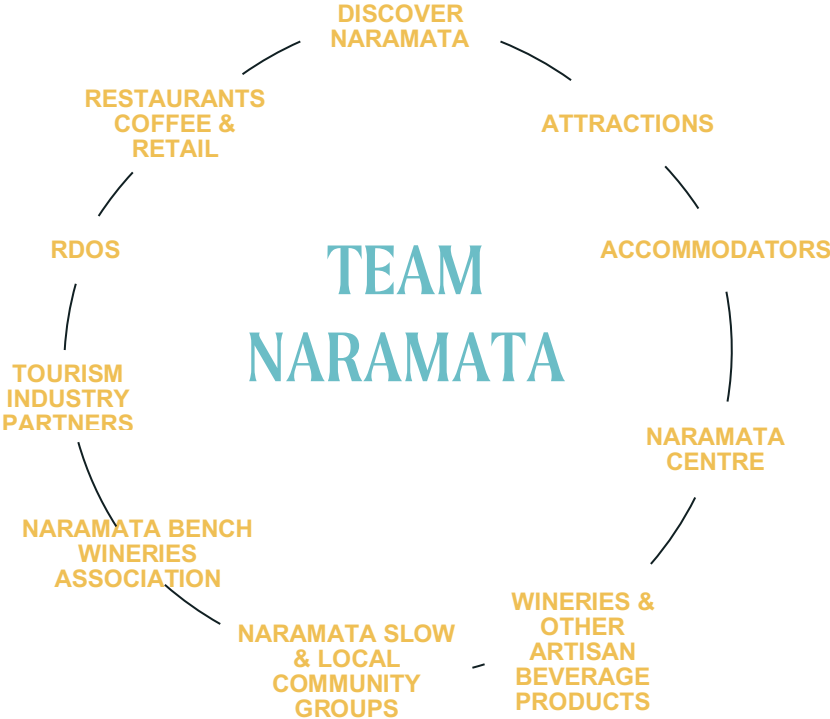
In developing this strategic plan, the following engagement process was used:

- Reviewed background documents, research, existing communications and messaging
- Comparator review of neighbours and similar DMOs
- Two, third-party led strategic workshops with the Board of Directors
- One community engagement workshop per plan development
- Shared the draft 5yr Strategic Plan at the AGM in January 2023
- Extensive outreach and promotion was done for a hosted community session to share the draft 5yr strategic plan with all interested accommodators, members and community residents.
- Numerous discussions with DBC, including sharing the draft 5yr strategic plan and one-year tactical plan
- Engagement with every 4+ accommodator (including circulating copies of the strategic plan and tactical plan to review and provide feedback)
- Received support from the Area E Director and the Regional District of the Okanagan Similkameen via a Letter of Support
- Met with neighbouring DMO Travel Penticton to ensure alignment
- Met with local “Attainable Living Society” to discuss potential future affordable housing initiatives
- Full 5yr Strategic Plan is available on discovernamata.com

Findings from the engagement process were reviewed and consolidated to identify key insights, evaluate goals and pillars and generate recommendations that shaped this strategy.

We are all Team Naramata

“Team Naramata” speaks to the partnership and commitment across the industry ecosystem, to each other, and to our industry. This industry collaboration sets the stage for the destination’s future success.



Our Vision & Mission

Vision

Discover Naramata supports the marketing and building of a destination recognized by those looking for an authentic, quality, slow travel experience and supports the community and people who make this unique destination special.

Mission

To use our collective time and skills to generate customers for our members and economic benefits for our community, while recognizing our responsibilities to residents, the environment and our guests.

Last updated January 26, 2021

Specifically, Discover Naramata’s Mission Statement is comprised of 4 primary facets:

- a) To bring visitors to Naramata to eat, drink, shop, stay, play, spend, ride, paddle, hike in a sustainable manner that strives to significantly broaden the historical 12 week peak visitation period
- b) To pool resources, expertise, and objectivity to develop and implement leadership and marketing strategies that support individual members while increasing overall visitation and visitor spend in Naramata.
- c) To strengthen the Discover Naramata membership into a like-minded coalition of Naramata businesses, organizations and services that work together in the pursuit of a common goal.
- d) To stay current, open-minded and nimble with the goal of increasing Naramata’s competitiveness and attractiveness as a top-choice destination long term.

Strategic Context

BACKGROUND

Naramata* offers unrivalled charm, active agriculture, world class food and wine, a stunning natural landscape - making it a stand out destination within the broader context of the already iconic Okanagan Valley. Naramata encompasses the authentic waterfront village and the adjacent Naramata Bench wine and geographic region.

Located just north of Penticton, along the east side of Okanagan Lake, Naramata is often considered an extension of Penticton in the minds of visitors. It is, however, a vibrant, stand-alone destination with many world-class attributes. The Naramata journey begins as you leave Penticton, and meander along the famously windy and scenic Naramata Road. The route traverses orchards, farms, vineyards, and views upon views. Boasting more than 40 wineries (as well as cideries, distilleries and breweries), with many of the individual producers leading in sustainability, quality, and craft in the province. This wine route is the calling card for many visitors to the area. Naramata is the Okanagan's hidden gem and the jewel in the region's crown.

**Throughout this document, when we say 'Naramata' it is for brevity and encompasses both the village of Naramata as well as the Naramata Bench as a broader region.*

SITUATIONAL ANALYSIS

In 2021 Discover Naramata was at a crossroads with navigating the COVID-19 pandemic, an undefined brand and lack of clarity in the organization's best and highest purpose. Although summer visitation was strengthening again, the reality that regional neighbours were aggressively pursuing the same travellers at the same time meant Discover Naramata needed to evolve to compete and support local businesses who depend on tourists.

Through research and consultation with residents, business owners, employees and visitors, a third party advertising agency helped Discover Naramata uncover what differentiates the destination from other tourist destinations and articulate Naramata's brand promise to establish a more meaningful connection with travellers.

In addition to launching a new brand, Discover Naramata also updated the planning tools available for visitors to respond to the rapid acceleration in digital transformation and meet consumer expectations of digital capabilities, adding a direct booking tool to DiscoverNaramata.com and crafting a digital marketing plan.

These updates required a more consistent and effective funding model in order to stay current and competitive in the marketplace. For the first 20 years of its history, Discover Naramata operated like a chamber of commerce with a membership that paid nominal fees and had an annual budget of \$20,000.

In an effort to raise the operating budget without impacting member budgets, Discover Naramata implemented a volunteer destination marketing fee (DMF) to fund the organization's efforts. Collecting volunteer membership fees, or a 2% tax added to the bill at accommodations, or a \$1 per tasting at wineries, generates revenue that Discover Naramata and the Naramata Bench Wineries Association then split to market the region.

This year of change felt "new and different" to the area and the industry and impacted overall membership numbers while increasing revenues. Some members adopted a "wait and see approach" to the new funding model, choosing not to renew any type of membership. Some stuck to the basic membership model. Others felt energized by the innovation and opportunity to have visitors support marketing costs and jumped in with both feet. At the end of the 2022 fiscal year, the association had 48 members: 15 of those being DMF members - 56% Accommodators / 44% Beverage (35% NBWA) - leaving room for growth, feedback and further innovation.

Defining growth for tourism in Naramata is very important, given the need for community collaboration and a clear understanding of what that visitor ceiling could and should be. Naramata's "specialness" is relative to its size and access, to its authenticity and the preservation of its essence. Infrastructure, geography, and the population itself provides a hard cap on visitation and tourist offerings. With one road in and out, few hotels, limited culinary and retail offerings and no gas station - the target Naramata visitor is a unique and special one. One who is willing to "work a little harder" to find the pearl in the oyster while taking care along the way. A visitor who understands and delights in the community itself is part of what makes the experience feel meaningful. Discover Naramata's ability to attract this type of visitor is an important part of both our marketing and community strategies.

The Naramata community is diligent in preserving its village pace and lifestyle. For example, extensive effort was made to earn the village its CittaSlow international designation. This international recognition declares that the community has made a commitment to slowing down the pace of consumption and commercialism to safeguard a certain quality of life. This commitment, combined with an engaged and vocal community and a mix of long-time residents facing the realities of an influx of new homeowners has resulted in some uncertainty and resistance to change.

To be successful DN needs to be a leader in the preservation and protection of the destination. This is in line with the industry shift from Marketer to Social Enterprise and focusing the purpose of tourism development on the community and making it sustainable and beneficial to both visitors and locals. Fortunately, this also complements an increasing consumer demand for sustainable tourism and growth in demand for high quality, authentic experiences that will enrich the traveller's life by experiencing the destination like a local.

Discover Naramata will be a successful DMO by driving the visitor economy and aligning with the community values. A community focus means working together to build a year round visitor economy that is sustainable for the long term, disperses economic benefits widely to residents, and encourages visitors to see and discover more while also respecting and embracing community values.

Discover Naramata cares greatly about these outcomes and this is the essence of who we are. So, although there is still a lot to accomplish as an organization and a lot of room for growth, the significant progress already underway has Discover Naramata set up to weather the current political and economic volatility and be perfectly positioned to respond to the current cultural and industry trends.

The goals and pillars outlined in this plan leverage the many opportunities that are in front of us.

SWOT Analysis

STRENGTHS	WEAKNESSES
<ul style="list-style-type: none"> • Recognized beauty in the region and strong tourism appeal (vineyard & orchard landscape, lake, trails, etc) • Unique location – compact region, intentional to get here, easy to navigate and the walkability of the village. • Active agriculture community- longstanding fruit production and density of wine producers. Many boutique producers and producers leading sustainability, quality, and craft in the province. • Location – proximity to Penticton airport and drivable from major cities • Ambient weather during shoulder seasons • Variety of accommodations/experiences + products • Reputation for quality, authenticity; Loyal and repeat visitors • Village charm, strong community spirit and CittaSlow and Naramata Slow designations • Consistent delivery of top quality of service during peak season • A well-established craft beer and spirits scene • Launch of the new funding model – Destination Marketing Fee (DMF) • Strong owned digital experience (social media, website with new booking tool, and destination app) • Existing organization supporting the industry/wine region – NBWA • Visit Penticton also promotes the Naramata Bench as part of their efforts • Active and experienced Board of Directors, with strong community roots, extensive tourism industry experience and media and trade relationships 	<ul style="list-style-type: none"> • Seasonal closures and limited offerings for visitors during non-peak season • Lack of industry staff impacts consistency and quality of product offerings • Capacity limit being a small town with lots of owner operator businesses, many committees, and commitments, etc. • Limited village accommodations at multiple price points or multiple places to eat to support longer stays • No large event venue • No repository of or process for sharing data to support being a data informed destination and DMO • Small budget and resources compared with other regional DMOs • Lack of member engagement • Lack of collaboration between the multiple community organizations • Limitations as a working volunteer board with one paid team member. • Rebrand has not been fully rolled out to the community and visitors– not a common understanding or expression of what differentiates us • DMF funding model is in its infancy – it is volunteer and has limited participation

OPPORTUNITIES

- Increase, build awareness and garner interest with rebrand and our unique offering
- Improve quality of life for those that live and work in Naramata and on the bench (local led approach)
- Capacity to increase visitation year-round and spread out visitation with increased marketing/incentives during non-peak times
- Become more of an overnight destination
- Attract niche small scale events in non-peak seasons
- Target niche groups (ie: slow food, slow wine, Astro tourism, etc)
- Enhance our profile and leverage our limited budget through strategic local and regional partnerships
- Collaborating with other community organisations to reduce redundancy and leverage impact for dollars
- Growing the membership, with satisfied membership who perceive the value
- Empower members to improve and support their own marketing efforts with shared messaging, assets (ie: toolkit)
- Sharing of information amongst members – strengthen data driven decision making amongst across the destination
- Sharing and celebrating success when achieved with members and community
- Provide industry training and support to help maximize potential
- Biking (now ebikes) has expanded the demographic of visitors
- Walk/bike lane on Naramata road and throughout the bench
- Build on Summerland affordability study
- DMF – Further opportunity for funding thru beverage producers and accommodators
- MRDT – Possible funding from Municipal Regional District Tax
- In-Destination: Visitor Education and Engagement
- Regional Technology Task Force
- Better collaboration with wineries – Sommelier retreats, travel trade coverage
- Increase history story telling of Naramata beyond museum

THREATS

- There is a ceiling in terms of development as a compact region and village- with one road in and out (few hotels, no gas station, etc)
- Similar products and experiences are being offered by neighbouring DMOs
- Lack of affordable housing and high cost of living makes it difficult to attract and retain tourism industry staff
- Environmental impacts such as forest fires, high water or extreme weather
- Urban development posing a threat to the rural agricultural bench
- Perceived as day trip only
- Off season pricing stays high
- Funding ceiling in existing DMF model
- Not receiving and/or pursuing additional funding
- Lack of businesses joining poses challenges to promote everyone in a membership model
- Limited membership engagement
- Partner organizations not actually partners yet
- Board/Volunteer fatigue
- Lack of community trust w/board/membership model - diversity of opinions, communication problem

Our Brand

A brand is so much more than a logo. It is a cohesive and inviting story developed from core insights and feelings of the unique elements of our destination. It is the sum of many parts and inspires an emotional reaction.

To be authentic, compelling and lasting a brand must dig deep and represent many voices, truths, places and promises.

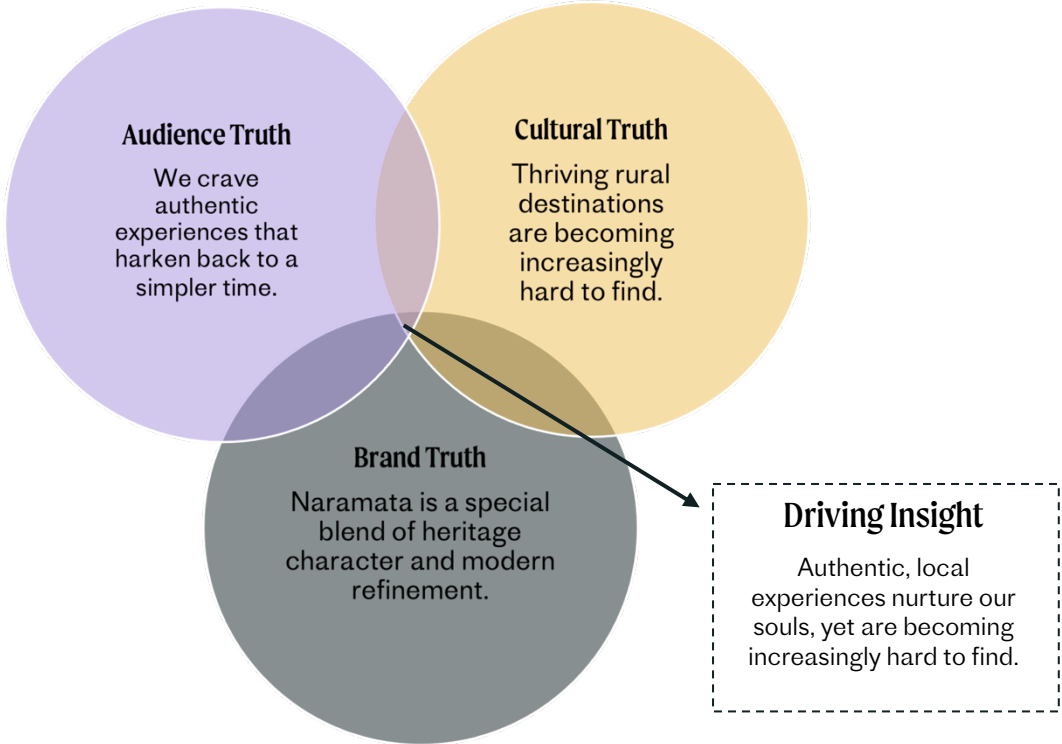
Naramata is more than just what you can “do” here. It’s how it feels to be here. Our destination brand was developed to unite the messaging of our organization and our members and help to build destination awareness as part of our external marketing efforts.

BRAND PERSONALITY

- We’re quaint and folksy, but still confident and effortless.
- We relish in the special touches, but we’re still down-to-earth.
- We’re warm and inviting, and we actually mean it.

BRAND ATTRIBUTES

- Immersive, Serene, Wonderful, Harmonious, Gorgeous, Unreal, Magical



BRAND PROFILE



Target Audience & Markets

OUR AUDIENCE

Visitors

They crave authentic experiences that harken back to a simpler time. Authenticity seekers are avoiding tourist traps, to find places with true “soul”. Looking for a well-kept secret and wanting to support and experience local products and businesses- just like the locals do. It’s all about how the experience makes them feel and what they learn from it: they are trying out another way of life.

The refuge of simpler times and a slower place is appealing for city dwellers. As a result of the COVID-19 pandemic even more people are wanting to escape from the city and go rural. The expansive space and slower pace allow people to forget about deadlines and busy lives and feel like they are part of something bigger. Reconnecting with simple pleasures and savouring the pleasures of the land, the food, and the authentic community, and feeling like they belong.

Naramata’s world class wine status and culinary scene complements the increasing demand for high-quality, authentic experiences and that culinary travel is continuing to grow across the industry. Within this there are niche categories including the “gastro-tourists” and those that wine is the sole purpose for the trip.

The target audience, leveraging Destination Canada’s Explorer Quotation segmentation framework is: Authentic Experiencers.

The Authentic Experiencer segment provides the best opportunity for Discover Naramata due to large size and above average spending per trip and aligns with Naramata’s destination offerings.

Authentic Experiencers

Authentic Experiencers are typically understated travellers looking for authentic, tangible engagement with destinations they seek, with particular interest in understanding the history and culture of the places they visit.

TOP TRAVEL VALUE	<p>Cultural Immersion - Believe that the best way to experience a culture is to interact with it as deeply as possible. Seek to adapt to the local culture, exploring and spending time in local areas most tourists don't visit.</p> <p>Historical Travel - Seek to visit the sites where important historical events took place (e.g. cultural, arts, philosophy, religion, battles, political).</p>
TOP SOCIAL VALUES	<p>Importance of Spontaneity - Tend to enthusiastically embrace the unexpected and spontaneous events that temporarily interrupt daily routines.</p> <p>Brand Apathy - Place little importance on the brand name of a product.</p> <p>Cultural Sampling - Have an inclination to incorporate other cultural influences into their own lives.</p> <p>Everyday Ethics - Respond well to situations that put their ethical beliefs to the test.</p>

**Explorer Quotient (EQ) Toolkit developed by Destination Canada and provides tourism businesses with valuable insights into why and how different people like to travel.*

Residents & Locals

Naramata Village Residents:

- Average age of the population in Naramata is 51.4 (Penticton is 48.9 years old) The average age in B.C. overall is 43.6, while in Canada it's 41.9.**
- Village Population 2021 - 1,628

Naramata residents are highly engaged and passionate, and there is a strong sense of community.

***Stats Canada Census 2021 data*

TARGET MARKETS

Discover Naramata will primarily focus on short-haul markets, in line with Travel Penticton and Tourism Kelowna that currently show 60+% of visitors are coming from BC, and approximately 13% from Alberta. Key geographical target markets recommended are listed below.

- Regional BC (focus Lower Mainland)
- Future: Washington State and Alberta (with a focus on Calgary, Edmonton and Red Deer)

Management, Governance, and Administration

Discover Naramata Community & Business Society (“Discover Naramata”) is the designated recipient under the MRDT program. As a Destination Marketing Organization whose specific purpose is tourism marketing, Discover Naramata will be responsible for carrying out the proposed activities outlined within this plan and the monitoring and reporting on the use of MRDT funds.

The Discover Naramata Board is the governing authority of the association, a Not-for-Profit, and is responsible for its governance and strategic direction, which involves developing policy and then, organizing its work through appointed committees.

As a member-based organization, Discover Naramata is also accountable to its Members and as such we operate in a manner that is collaborative and to enable businesses, residents and therefore our whole community to benefit from a growing visitor economy. Alignment with our Members and tourism stakeholders as well as relevant local and regional partners are key.

Sources of Funding

Discover Naramata operates under these main funding streams:

- Discover Naramata DMF (Destination Marketing Fee), a voluntary fee collected by accommodators, wineries and other beverage producers.
- Discover Naramata Generated Funds - this includes membership fees, retail sales revenue and any additional income from special projects.
- Grants & Subsidies - We are actively pursuing viable provincial, federal grant and subsidy opportunities and co-operative alliances with TOTA, Destination BC, regional DMOs, our members and other tourism partners in order to maximize our efforts.

Funds from the MRDT will be incremental to the existing sources of funding listed above.

Five-Year Goals

Looking to 2028 is a challenging exercise – given the current post-pandemic and evolving tourism industry landscape at the time of writing. However, we know our region is resilient and we know that Naramata will continue to be a unique and welcoming destination in years to come.

Discover Naramata’s strategy and execution will establish us as a DMO and set us apart from our neighbours. Our Board of Directors are passionate about our community and committed to leading the organization to excel.

Discover Naramata has identified three overarching goals that will help guide the organization over the next five years. With the intent to revisit on an annual basis as the tourism industry grows stronger and our organization grows into a stable DMO.

SUSTAINABLE GROWTH

1. Grow the visitor economy sustainably by attracting our target traveller* at the right time (extending shoulder season) for the benefit of our community by way of our members.
2. Provide a foundation for long-term organizational sustainability and growth of the visitor economy in Naramata.
3. Receive funding from MRDT of an estimated \$100,000 - \$150,000 annually.*

ORGANIZATIONAL LEADERSHIP

1. Provide value, support and leadership to our members.
2. Operate with transparency, accountability and in alignment with our community and members.

STRENGTHEN CONNECTIONS

1. Improve connections with locals and residents, community partners, members, visitors, industry and media.

**The target Naramata visitor is looking for an authentic tourism experience which aligns with our destination and are regionally located in short-haul markets where a large percentage of our visitation is already coming from. Geographical markets will expand based on funding.*

**Naramata will not use MRDT funding towards affordable housing initiatives upon immediate implementation, if successful. Continued community engagement will ensure affordable housing initiatives are explored and reflected in future plans if applicable.*

Strategic Pillars

Discover Naramata went through a planning exercise with its board, key industry and community stakeholders and an external strategic consultant at which there was substantial discussion regarding priorities for the near and long-term, looking forward to the future for what the organization could look like within the destination.

Three strategic pillars were deemed to be most applicable and relevant for Discover Naramata:

- 1. Engagement**
- 2. Community Building**
- 3. Organizational Sustainability**

Discover Naramata's long-term strategies and tactical plans will be built on these three strategic pillars.

Pillar 1: Engagement

OBJECTIVE

Own the Discover Naramata brand to differentiate Naramata and grow awareness and visitation to the destination.

WHY IT'S IMPORTANT

This pillar aligns with overarching goal 1 – Sustainable Growth.

Embracing the brand work completed in 2021, Discover Naramata now has the foundation to build upon and become established as a destination marketing organization.

Under this pillar, demand for visitation will be built and growth will be driven through data-driven marketing, strategic partnerships and attracting our target visitors at the right time, to our community.

KEY STRATEGIES

Establish the Brand

Engage the community, by way of its members, in the destination brand. Discover Naramata will foster a destination brand that is shared among our visitors, members, partners, and community.

- The Discover Naramata team will become accessible as brand ambassadors - in everything we do from tourism engagement, social marketing to community outreach.
- Ensure all marketing communications are built from the brand and inherently are cohesive.
- Roll out the brand fully to members and empower members to improve and support their own marketing offerings with shared assets and messaging.
- Develop local-facing messaging that promotes the brand, experiences and community events.
- Create and implement a framework to identify, evaluate and support new product development opportunities to drive the shoulder and festive seasons.

Data-driven Marketing

Data-driven digital marketing is key to delivering innovative, efficient and effective communications. Discover Naramata will put the right initiatives in place at the right time to ensure the organization is well positioned to market the destination effectively.

- Develop annual Marketing Plans that are focused and include:
 - Key target markets and promote iconic experiences
 - Online and social engagement across monitored channels
- Integration across all marketing initiatives and tactics throughout Team Naramata
- Develop and formalize the earned media and public relations strategy

5-YEAR OUTCOMES (KPIs) MEASURABLE PERFORMANCE

- Increased awareness and visitation (DMF revenues - grow from baseline)*
- Creation of a strong and shared sense of place and community among residents, stakeholders and visitors.
- Higher occupancy rate and day tripper visitation in non-peak seasons
- Increased average length of stay (Daily average room rate)
- Number of hosted/earned media
- Website traffic
- Social Media engagement/impressions/referrals

**Assumes DMF reporting can be captured accurately to develop a baseline quarterly throughout year one. Or other member reporting avenues/channels can be implemented.*

Pillar 2: Community Building

OBJECTIVE

Foster community support and pride around a shared vision for the future that prioritizes opportunities for residents and business owners and preserves our small-town essence, character and vitality.

WHY IT'S IMPORTANT

This pillar aligns with overarching goals 2 and 3 – Organizational Leadership and Strengthen Connections.

A great place to live, is a great place to visit. Discover Naramata is an organization built on much more than marketing the destination to visitors. We are part of this small town community and strive to grow tourism in a responsible and sustainable way; enabling businesses, residents and therefore our whole community to benefit from a growing visitor economy.

Over the next five years, Discover Naramata's team will establish community building strategies and actions that make progress towards long-term success. The organization will be a voice for our tourism industry and a leader in our community. The focus is on community building with industry stakeholders and community partners while also engaging residents to inform and ensure that tourism increases the value of the visitor economy and adds to the quality of life in Naramata.

KEY STRATEGIES

Engage the Community

The community is the essence of Naramata. It is where the brand truth stems from, the reason that Naramata is a special blend of rural character and modern refinement. Many of our residents are aware of the important role tourism plays in the community, but they may not understand the true value the visitor economy brings to the destination.

- Meaningfully engage residents to build awareness and understanding of the benefits of Discover Naramata and the role tourism contributes to the community.
- Build on community pride by ensuring tourism initiatives align with shared community goals such as experience development, promoting events, what's happening now and growing what's local year-round.
- Contribute tourism knowledge and expertise to ensure visitor perspective is considered in all local projects
- Communicate success and learnings widely within the community to foster new members and elicit new opportunities.

Develop the Destination with Team Naramata

The Team Naramata concept will be put into action to develop the destination - from new products to experiences, Team Naramata will collaborate and come together in support of growing the destination sustainably.

- Experience development will focus on embracing the brand to drive growth in off-peak seasons (Fall, Spring and Festive) and build on community events year-round.
- Investigate a strategy and funding for Pop-up/Mobile Visitor Centre.
- Commit to and support reconciliation with indigenous peoples within tourism initiatives - build a plan to acknowledge and engage with local indigenous nations (Syilx/Okanagan Nation) and better understand the role in tourism.

Deliver a High-Quality Visitor Experience

A visitor's experience in Naramata is top priority; be the visitor a leisure traveller, a day-tripper, or a local visitor. All visitors will feel welcomed by our community.

- Share local welcome and passion with visitors; monitor, understand and evaluate visitor feedback.
- Building on the growing community and brand ambassadors, Discover Naramata will help educate industry employees, support and facilitate relationship building and innovative community building and tourism initiatives between residents and visitors. By leveraging existing industry training modules from DBC and industry partners.
- Increase accessibility of our tourism services and experiences; continue to enhance digital visitor information and place information where visitors frequent.

5-YEAR OUTCOMES (KPIs)

MEASURABLE PERFORMANCE

- A great place to live is a great place to visit
- Engaged residents that welcome visitors to Naramata and who are destination brand ambassadors
- A visitor experience with knowledgeable industry employees and passionate community advocates that cross promote Naramata experiences.
- Strong relationships with industry stakeholders
- Resident Sentiment Index (build program year 3)
- Businesses certified in a sustainable tourism program (build program year 3)
- Increase in marketing metrics – social media, book direct referrals, website visits

Pillar 3: Organizational Sustainability

OBJECTIVE

Establish a foundation for long-term organizational sustainability.

WHY IT'S IMPORTANT

This pillar aligns with all three overarching goals – Sustainable Growth, Organizational Leadership and Strengthen Connections.

Moving forward the organization is committed to establishing and tracking metrics of success that will ensure a sustainable DMO.

Discover Naramata will provide value, support and leadership to our members.

KEY STRATEGIES

Build on the Successes of Team Naramata

Destination management organizations are evolving, Discover Naramata will take actions and put measurements in place over the next five years to ensure long-term sustainability - people, planet and profit. Development of the brand and this strategic plan are the first steps towards a focused DMO. Key components of this strategy include:

Implement a system where key stakeholders can share current information across entities.

- Support tourism industry staffing recruitment and retention efforts.

Define and prioritize how, what and why partnerships will benefit the organization; set a framework to:

- Grow local and regional partnerships (such as NBWA, Visit Penticton, TOTA, Visit South Okanagan and WCBC)
- Pursue partnership grants to ensure expansion and growth (Action: Outsource this role to an expert to apply for the grants)
- Participate in key initiatives such as DBC and TOTA programs.
- Introduce and promote Discover Naramata to BC DMOs (formalize as part of DBC partnership initiatives)

Create a roadmap of organizational sustainable destination management initiatives to implement, significant elements include:

- Annual budget forecasting
- Annual marketing communications and tactical plans, define key programs and milestones on an annual basis
- Successful DMF funding renewals and growth, and ongoing successful MRDT funding and reporting.

- Build destination product development for off-peak seasons (see Pillar 2 for more discussion)
- Secure ongoing resources required to deliver on our mandate
- Cultivate a culture of best practices and innovation
- Regularly monitor and report on progress towards tourism goals
- Expand the Board of Directors

Develop and roll-out a corporate scorecard that holds the organization accountable including standard marketing metrics and standard reporting structure related to web traffic and digital engagement. Baseline for each KPI is a key focus in 2024 based on marketing and community engagement initiatives.

KEY PERFORMANCE INDICATORS
Long-term Measures
Visitor Volume
Visitor Spend
Resident Tourism Sentiment
Visitor Satisfaction
Marketing Key Performance Indicators
To be developed based on annual Marketing Plan <i>(i.e website traffic and social media engagements)</i>
Stakeholder Engagement
Stakeholder eNewsletter Open Rate
Community Session Attendance Rate

5-YEAR OUTCOMES (KPIs) MEASURABLE PERFORMANCE

- A properly funded DMO
- A stable, effective and resilient organization with a defined corporate scorecard
- Increased DMF revenue (KPI - Growth)
- Growth in membership - accommodators and winery
- Excellent local and regional partnerships
- Champion destination product development
- Successful grant applications
- Sentiment of members and stakeholders

- Tourism advocacy instances
- Funding in dollars from DBC (cooperative marketing/events)
- Advocate on issues that will strengthen and support tourism

Summary

Three strategic pillars regarding engagement, community building and organizational sustainability provide the foundation for Discover Naramata’s long-term strategies and the framework upon which the annual marketing and tactical plans are built. Desired outcomes have been identified with suggested measurements to implement. A formalized scorecard should continue to be defined to measure progress year over year, building off the progress in 2023-2024 to create organizational benchmarks.

Tourism is a core economic drive for the village and the Bench; it is critical that the community continue to invest in tourism infrastructure that will build a foundation to drive growth and provide more reasons for visitors to choose Naramata.

This plan sets the stage for a growing and strong visitor economy that is embraced by the community.

During this strategic planning process the following key strategies were identified as priorities:

1. Continue to define and strengthen our partnership with NBWA
 - NBWA and DN to share key priorities
 - Quarterly meetings between DN and NBWA to ensure alignment
 - Cross representation on board of directors
2. Organizationally fully adopt and embrace our brand
3. Continue to rollout the Discover Naramata brand to our community
 - Add value by providing services to members, determining the greatest need first (i.e; professional development, tips and tricks, templates, community resources, an events calendar, job board, support with quality photography, member toolkit, etc.)
 - Develop Discover Naramata Ambassadors that help with community relationship building and member recruitment
 - Be the connector between members and local talent (ie: social media, copywriters, photography, signage/printers, etc)
 - Leaders in appealing to the greater good/civic duty to contribute to a strong community
4. Annual development of a Marketing and Tactical Plan