

A stone sculpture of a man in a thinking pose, with a seagull perched on his head. The background is a blurred, warm-toned scene.

Rethink Vancouver

Tourism Industry Summit

March 31, 2011

SUMMIT INTRODUCTION

James Terry, Chairman

Rethink Vancouver Advisory Council

SIX QUESTIONS FOR TODAY'S DISCUSSION

1. Should there be a larger shared vision, beyond tourism? If so, should it be for Vancouver or Metro Vancouver?
 2. Should we, together, convene a Metro Vancouver Tourism Alliance? If so, who is it, what does it do, how should it operate?
 3. Should there be a Tourism Master Plan? If so, who should be involved?
 4. Should there be an overarching, shared brand strategy for Vancouver? If so, who needs to support it?
 5. Should DMOs, such as Tourism Vancouver, become DMMOs, undertaking destination marketing and management?
 6. What other issues need to be addressed in relation to Tourism Vancouver's future *Rethinking*?
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CONVENING

Gary Grimmer, Consultant

Rethink Vancouver

RETHINK'S TWO CORE QUESTIONS

1. What is it that the Metro Vancouver tourism industry would like to accomplish together in the coming decade?
 2. What, then, does destination marketing for Vancouver look like going forward, beginning in 2012?
-

We developed a tourism vision together.

Vision: Vancouver will be known as the world's most exciting, attractive and welcoming destination – a must-visit, 365 days a year.

Values: Sustainable, community supported.

Mission: Industry unity to deliver experiences and visitors who become promoters

Goals

Top 10 must visit destination

Growth in every season

Visitors become ambassadors

\$10 Billion per year in visitor spend

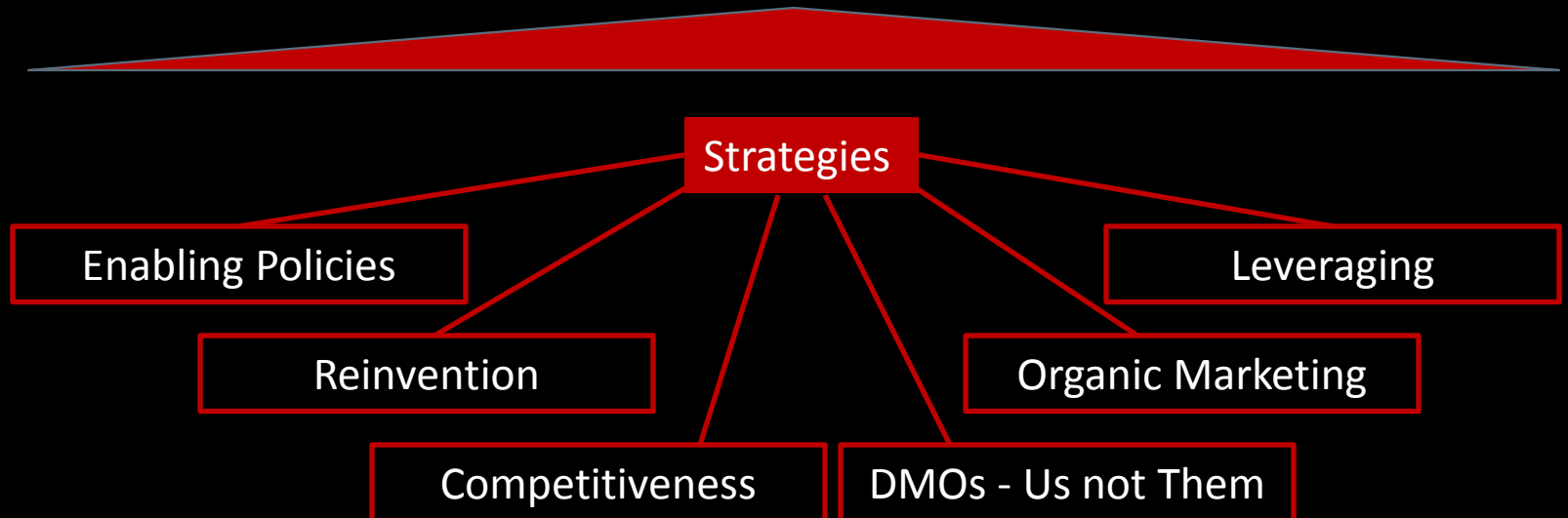
KPIs

City brand rankings

Overnight visitors

Composite Index

Total Spend



***RETHINK'S* TWO CORE QUESTIONS**

1. What is it that the Metro Vancouver tourism industry would like to accomplish together in the coming decade?
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RETHINK VANCOUVER

Discussion Forum

Vancouver 2020:

Making Our Tourism Goals Part of a Larger Vision



Vancouver 2020: Making Tourism Goals Part of a Larger Vision

Discussion Question 1

Should there be a larger shared vision, beyond tourism? If so, should it be for Vancouver or Metro Vancouver?

Vancouver 2020: Making Tourism Goals Part of a Larger Vision

Community Buy-in

Premise

Becoming the world's most exciting, attractive and welcoming destination – a must visit, year round is a good vision for the tourism industry. But, achieving that will probably require an even larger vision that is embraced and supported by government, other industries and the community.

Issues

- **Cross -sectoral – If we are to engage with other industries, the vision must extend beyond tourism.**
- **Our needs are bigger than us – some of the constraints we face aren't just tourism related and they also affect other industries and the community:**
 - Ground transportation
 - Precincts
 - Excitement / events / cultural assets / lifestyle
 - Capacity limitations / customs
 - Tax regimes
 - Professional networks / corporate offices
 - Branding
 - Development constraints
 - Investment climate
- **Maybe the reason the tourism industry globally has been weak is because we have tried to go it alone instead of being part of something bigger?**

Discussion Forum

Future Leadership:

Metro Vancouver Tourism Alliance



Future Leadership

Discussion Question 2

Should we, together, convene a Metro Vancouver Tourism Alliance? If so, who is it, what does it do, how should it operate?

Future Leadership

Metro Vancouver Tourism Alliance

Premise

Stakeholder interviews suggest that there is broad support for development of a collaborative forum in Vancouver for strengthening advocacy, industry leadership and alignment.

Issues

- **What type of organisations should comprise the Alliance?**
 - Sector associations (eg. Hotels, Attractions, Arts & Culture)
 - Government – municipal / provincial?
 - Individual operators
 - Economic development offices

- **What should be the primary focus of the Alliance?**
 - Overarching shared brand strategy?
 - Tourism Master Plan?
 - Destination development and management?

- **What resources will the Alliance need to be successful?**



Discussion Forum

Future Roadmap:

Tourism Masterplan

Future Roadmap

Discussion Question 3

Should there be a Tourism Master Plan? If so, who should be involved?

Future Roadmap

Tourism Master Plan

Premise

Becoming the world's most exciting, attractive and welcoming destination – a must visit, year round will require a clear definition of what that requires and clear, unified direction going forward.

Issues

- **What is a Master Plan?**
 - A roadmap for developing an industry that is in sync with community goals and aspirations
 - Addresses issues defined by a destination's situation and stakeholders
- **Rethink strategy addresses many Master Planning issues, but, at a high level**
- **A Master Plan could represent a level of diligence required for credibility with government**

What is a Tourism Master Plan?

Example Elements	Example Issues	
Environmental Audit	Natural resources Physical attributes Economic resources Institutional assessment	Enablement Development Ops Development Constraints
Legal Frameworks	Tax Regimes Regulatory environment	Government Policies Tourism Law
Market Demand Analysis	Performance analysis	Potential growth analysis
Product Assessment	Infrastructure Attractions / Food / Nightlife Entertainment	Cultural Resources Precincts
Capacity Assessment	Accommodations / Venues	Air Services
Services Assessment	Standards Workforce	Existing Training Capabilities Training Needs
Investment Climate	Capital sources Growth potential	Regulatory environment
Strategies	Policy development Product development Capacity Stewardship / sustainability	Cultural context Resources Safety & Security Marketing and servicing
Social & Economic Benefits	Economic growth Employment Cultural preservation	Export and trade development Expertise enhancement Economic mobility
Action Plan	Implementation steps	Critical path
Plan Management	Responsibilities Monitoring	Reporting Accountability

Networking Break

RECONVENING

Gary Grimmer, Consultant

Rethink Vancouver

Discussion Forum
Future Building:
Vancouver's Branding



Future Building

Discussion Question 4

Should there be an overarching, shared brand strategy for Vancouver? If so, who needs to support it?

Future Building

Vancouver's Branding

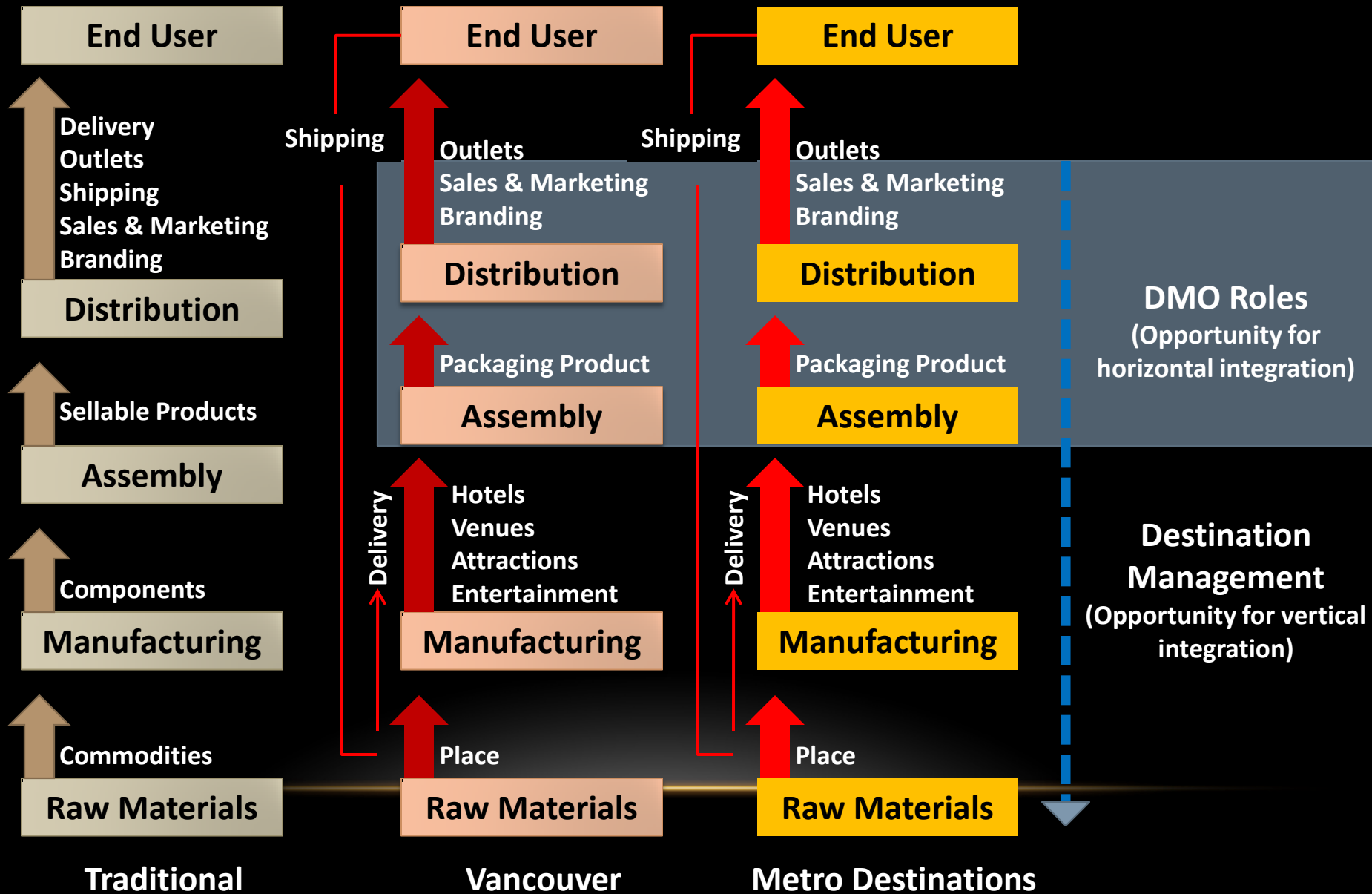
Premise

Becoming the world's most exciting, attractive and welcoming destination – a must visit, year round is absolutely dependent on a successful global brand extension.

Issues

- **Branding (verb) – “A concerted effort to align consumer perceptions with product perception goals.”**
- **Branding (noun) – “What the consumer actually perceives the product to be.”**
- **Logos and slogans are not brands – they are branding devices.**
- **A brand is essentially a promise made and a promise delivered.**
- **Proctor & Gamble spends more each year on branding a nasal spray than Vancouver does on branding an entire destination.**
- **Vancouver needs every shoulder to the branding wheel – so everyone possible needs to buy in.**
- **Who is everyone that's possible?**

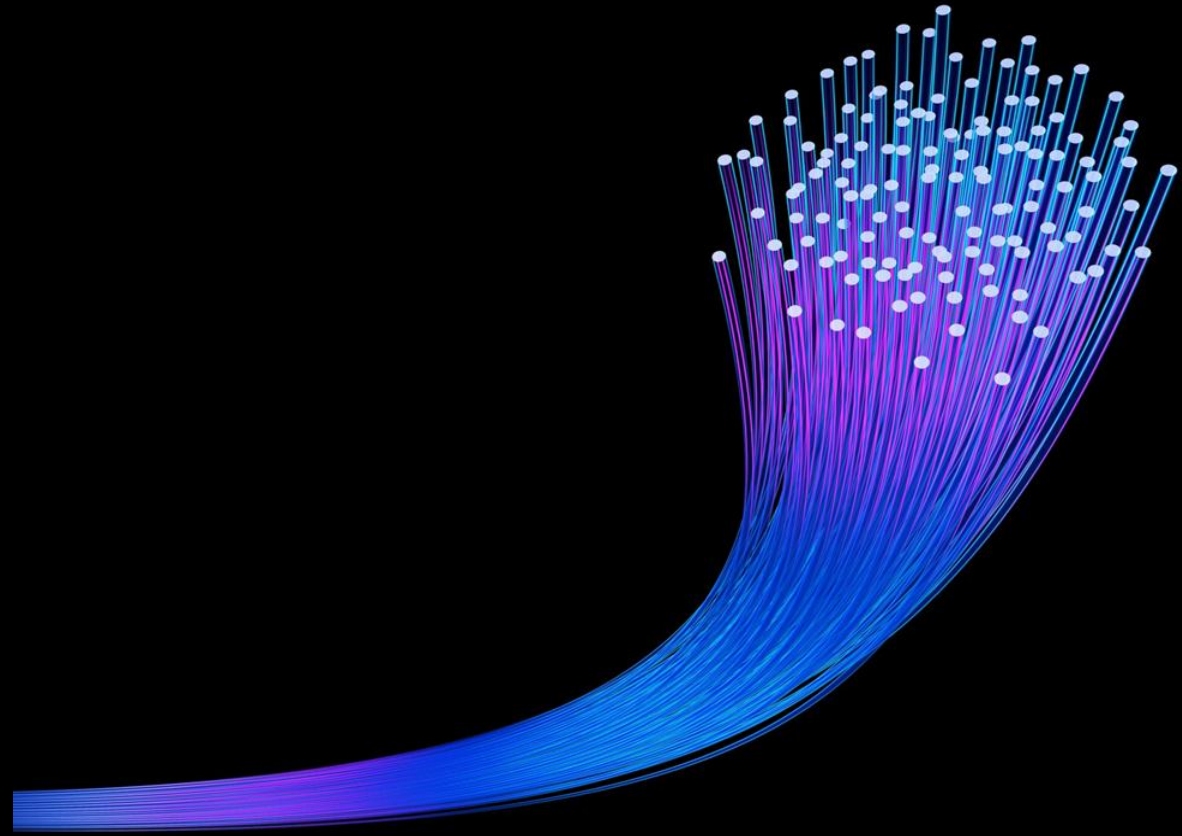
Metro Vancouver's opportunities to increase levels of integration.



RETHINK VANCOUVER

Discussion Forum

Future Engineering: Destination Management



Future Engineering

Discussion Question 5

Should DMOs, such as Tourism Vancouver, become DMMOs, undertaking destination marketing and management?

Future Engineering

DMMOs

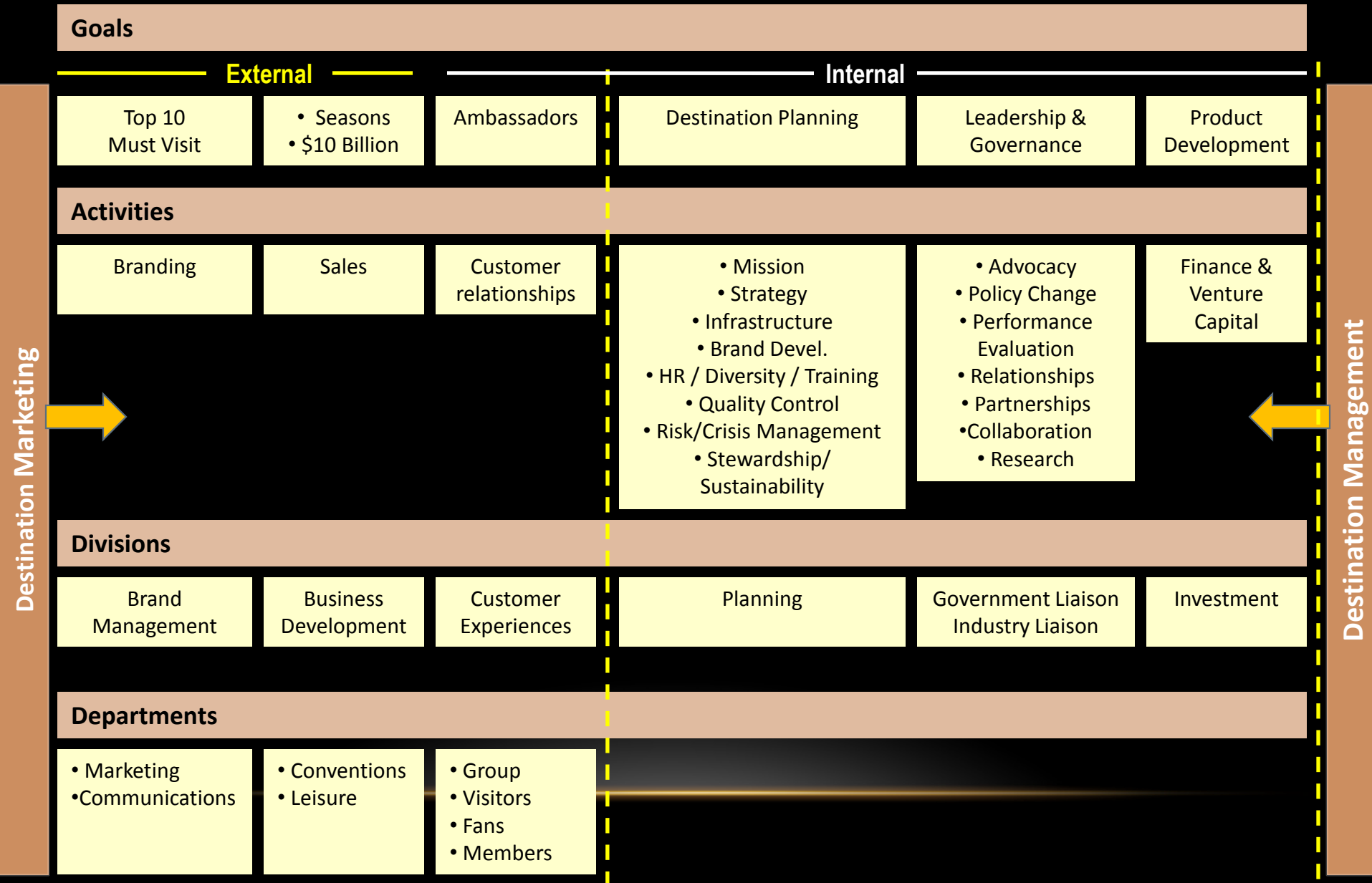
Premise

DMOs to varying degrees also take on destination management issues, becoming Destination Marketing & Management Organizations.

Issues

- **The broader the remit the tougher the focus?**
- **Can we afford a lack of destination management in any area?**
- **Besides sales & marketing, what elements of destination management are mission critical?**
 - Advocacy / Policy Change
 - Performance Evaluation
 - Relationship Management – Between organizations and sectors (Public / Private / Community)
 - Partnerships/Collaboration
 - Research
 - Mission / Strategy
 - Product Development – Catalysts & Facilitators / Finance & Venture Capital (Infrastructure / Precincts / Events / Services)
 - Brand Development
 - HR / Training / Diversity
 - Quality Control
 - Risk/Crisis Management
 - Stewardship/ Sustainability
 - Finance & Venture Capital
- **What can be done collaboratively, and what gaps must DMOs fill?**

Destination management structure - where to draw the lines?



The organization structures should align with the destination vision, goals and strategies.

INTRODUCTION OF DISCUSSION ON TOURISM VANCOUVER

James Terry, Chairman

Rethink Vancouver Advisory Council



Discussion Forum

Rethinking into the Future:

Tourism Vancouver Organization Strategy

Tourism Vancouver Organization Strategy

Rethinking the Future of Tourism Vancouver

Premise

We are entering the final phase of *Rethink*. Using stakeholder input, global market input and global best practices research the draft organization strategy is being prepared. It's important to test if we have identified all the relevant issues that need to be addressed.

Issues

➤ Strategy relating to destination:

- Unity
- Collaboration
- Branding
- Leadership
- Advocacy
- Integration
- Destination Management
- Customer Focus

➤ Strategy relating to Tourism Vancouver's organization approaches:

- Accountability
- Governance
- Priorities & Structure
- Resource needs
- Communications
- Membership Program

Tourism Vancouver Organization Strategy

Discussion Question 6

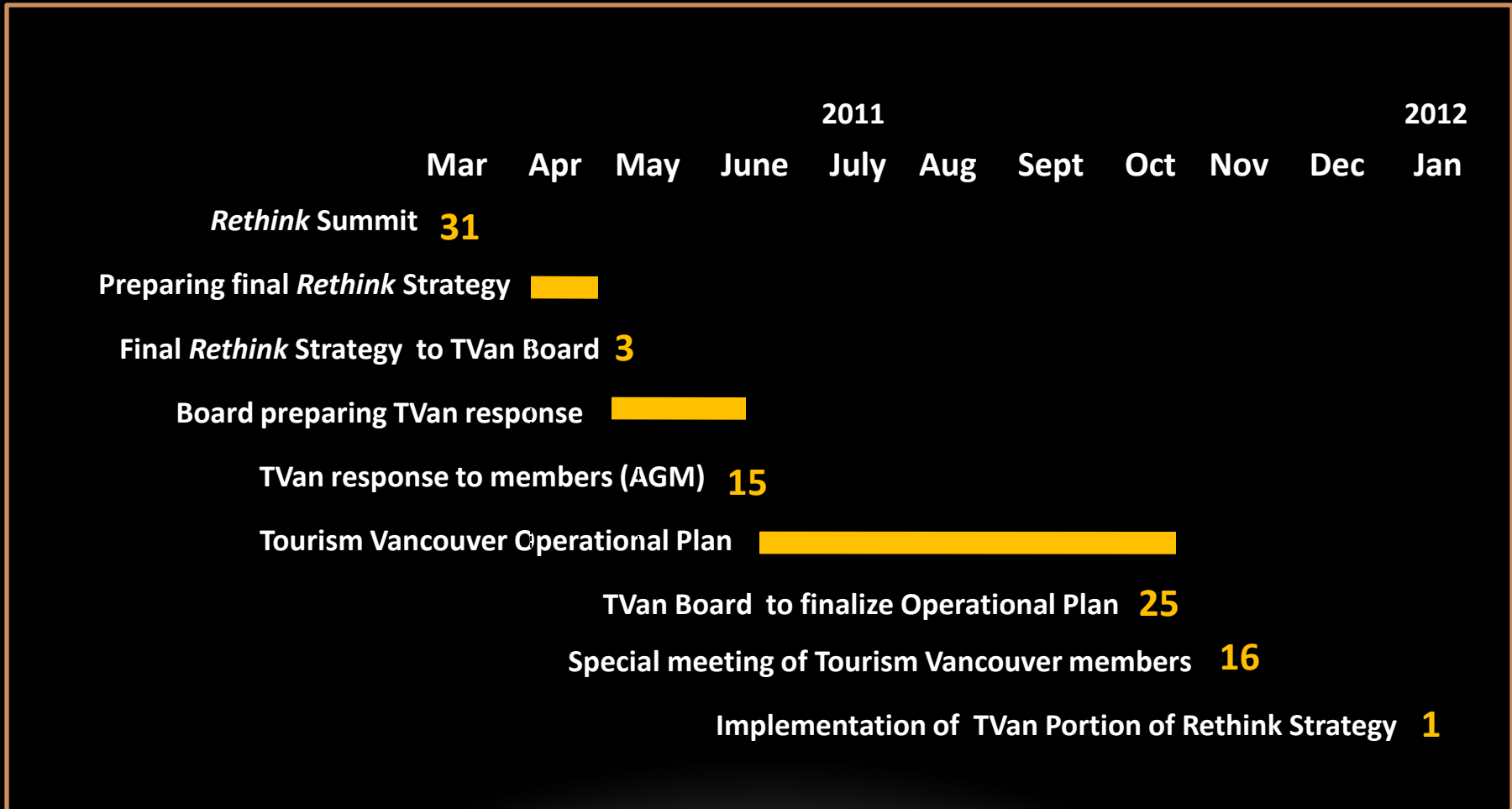
What other issues need to be addressed in relation to Tourism Vancouver's future *Rethinking*?

SUMMIT CONCLUSION

James Terry, Chairman

Rethink Vancouver Advisory Council

Tourism Vancouver Organization Strategy Timeline



Special thanks to the
Rethink Vancouver Advisory Council for their advice and
guidance throughout the course of this study.

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Rocky Mountaineer

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***RETHINK* VANCOUVER**

Industry Summit

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