

***Rethink* Vancouver**

Phase 1: Destination Strategy



Prepared by Gary Grimmer & Company, on behalf of the ***Rethink*** Advisory Council.
The contents of this report are subject to final changes.



The ***Rethink*** Vancouver 2020 strategy is dedicated to our friend and colleague, Virginia Greene, for her constant, inspiring and selfless devotion to building an ever more successful British Columbia.

Phase 1: Destination Strategy

1. Destination Plan

- a. Vision, Mission & Values
- b. Goals
- c. Key Performance Indicators
- d. Strategies

2. Appendices (Discovery)

- a. Issues and Gaps
- b. *Rethink* Opportunities
- c. Customer and Stakeholder Market Scan
- d. Sources for this study

Destination Vision

What stakeholders want from a vision statement:

- Customer focused
- Concise – something people will talk about
- Easy, short, aspirational
- Why more visitors will come to Vancouver
- Measurability

Key concepts

- “Year-round”
- “Must visit”
- Successful results

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

Destination Mission

What stakeholders want from a mission statement:

- Local industry focused
- What we will do to get more visitors
- Experiences are special, unique, worth doing
- Generate word-of-mouth

Key concepts

- Compelling reasons for people to come
- Urgency
- Repeat visits
- Inspiring
- Exciting

Vancouver's visitor industry will work together to offer compelling reasons for travelers to visit sooner rather than later and to deliver unsurpassed experiences that motivate them to return. Our visitors will become enthusiastic promoters of Vancouver as the most welcoming, inspiring, exciting and naturally beautiful destination in the world.

Destination Values

What stakeholders want from a values statement:

- Community focused
- How Vancouver achieves sustainable success
- Sustaining the “Olympic Spirit” enthusiasm
- Locals’ role in delivering the visitor experience

Key value concepts

- Diversity
- Sustainability
- Environmental
- Livability
- Accessible
- Tolerant
- Accountability

Vancouver’s visitor industry will seek to increase tourism in a way that further builds Vancouver’s energy, reinforces local values and delivers sustainable economic, cultural and environmental benefits. The Vancouver community will recognize the importance of the tourism industry and actively help to provide unique experiences to our visitors.

Phase 1: Destination Strategy

1. Destination Plan

a. Vision, Mission & Values

b. Goals

c. Key Performance Indicators

d. Strategies

2. Appendices (Discovery)

a. Issues and Gaps

b. *Rethink* Opportunities

c. Customer and Stakeholder Market Scan

d. Sources for this study

Vancouver Destination Goals for 2020

What stakeholders want included in goals:

- Growth in value and impact
- “Must visit”
- “Year-round”
- Measurability
- Exciting destination

Key concepts

- Sustainability
- Fill unused capacity
- Goals align with vision, mission & values

- 1. Vancouver will be ranked as one of the top 10 “must visit” destinations in the world.**
- 2. Vancouver will achieve high levels of growth in every season of the year.**
- 3. Vancouver’s visitors will have such great experiences that they will become destination evangelists.**
- 4. Vancouver’s tourism industry will sustain over \$10 Billion per year in visitor spend.**

Phase 1: Destination Strategy

1. Destination Plan

- a. Vision, Mission & Values
- b. Goals
- c. Key Performance Indicators
- d. Strategies

2. Appendices (Discovery)

- a. Issues and Gaps
- b. *Rethink* Opportunities
- c. Customer and Stakeholder Market Scan
- d. Sources for this study

Goal 1: Vancouver will double the value of its visitor industry.

For illustrative purposes only: KPIs will be finalized when final destination goals are decided.

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Industry Value (Billions of dollars)	3.6	3.9	4.2	4.5	4.9	5.3	5.7	6.2	6.7	7.2

* Vancouver's visitor industry generated \$3.6 Billion in value in 2009

Goal

Source: TVan records and Gary Grimmer & Company analysis

Goal 2: Vancouver will be ranked as one of the top 5 cities in the world.

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Vancouver's Ranking	8	8	7	7	7	7	6	6	6	5

* Vancouver ranked as the #8 city in the world in the 2008 Anholt City Brand Index.

Source: Anholt City Brand Index, 2008 and Gary Grimmer & Company analysis

Goal 4: Vancouver will be a top 10 city in the world for international conventions.

	2011	2012	2013	2014	2015	2016	2017	2018	2019	2020
Known Conventions already secured	22	11	4	1	1	1	0	0	0	0
Secured in 2011	20	15	20	20	15	10				
Secured in 2012		20	15	20	20	15	10			
Secured in 2013			20	15	20	20	15	10		
Secured in 2014				20	15	20	20	15	10	
Secured in 2015					20	15	20	20	15	10
Secured in 2016						20	15	20	20	15
Secured in 2017							20	15	20	20
Secured in 2018								20	15	20
Secured in 2019									20	15
Secured in 2020										20
Total	42	46	59	76	91	101	100	100	100	100

**For illustrative purposes only:
KPIs will be finalized when final
destination goals are decided.**

Goals would be based on ICCA reported international conventions, which require 300 delegates or more. Vancouver hosted 46 of these conventions in 2009.

This would mean 275 new international conventions booked and occurring between 2011 and 2015

Goal

Phase 1: Destination Strategy

1. Destination Plan

- a. Vision, Mission & Values
- b. Goals
- c. Key Performance Indicators
- d. Strategies

2. Appendices (Discovery)

- a. Issues and Gaps
- b. *Rethink* Opportunities
- c. Customer and Stakeholder Market Scan
- d. Sources for this study

Vancouver Needs Government Policies That Enable Success

Tourism Master Plan	<p>Vancouver's industry and government will work together to develop a Tourism Master Plan for use in guiding the future development of the industry.</p>
Air Access	<p>Government and Industry will seek to strengthen Vancouver's access through changes to the Open Skies Policy</p> <ul style="list-style-type: none"> ▪ US pre-clearance for PAX arriving on foreign carriers which can't get US slots ▪ Alignment between 5th Freedom Rights and Canadian visa policies on transfers ▪ Open skies with EU (e.g. currently by Canadian Government Policy Air France only permitted to land in Quebec and Ontario) ▪ Allocated slots for service from markets where Air Canada has high load factors (i.e. doesn't need protection) ▪ Achieving more Low Cost Carrier (LCC) service would help eliminate barrier caused by cost of air access. ▪ Identify, promote and support new direct air access route development to Vancouver
Air Costs	<p>Government and industry will work to make Canada more competitive through changes to tax and fee policies.</p> <p>Canada is not competitive with US, which has no ground rents, and government subsidizes the ATSC, airspace control and airport improvements (grants and bonds.) In 2009, the World Economic Forum ranked Canada 106th out of 133 countries on price competitiveness, with taxes and fees being a key contributing factor.</p> <ul style="list-style-type: none"> ▪ Eliminate airport rents and municipal taxes on airports ▪ Reduce Air Travelers Security Charge (ATSC) and other fees
Visa Policies	<p>Government and industry will work to change visa policies that are proving to have a significant negative effect on visitor activity.</p>
Boarder Clearance	<p>Increase resources for Canadian Border Services Agency and Implement smart boarder control technologies</p>
National Marketing	<p>A top priority for industry will be to restore CTC funding to world leading levels.</p>
Provincial Marketing	<p>A top priority for industry will be to make Tourism BC Canada's top funded provincial marketing effort.</p>
Customs & Immigration	<p>Industry and government will seek policy solutions to enhance border clearance experiences for conventions and events by providing VIP fast-track services for delegates and streamlined customs procedures for exhibitors and sponsors.</p>

Vancouver Needs Planned Reinvention

Global Leadership	Vancouver’s tourism industry will encourage formation of a “World City Task Force” to maintain a focus on, and activities geared towards establishing the city’s position as a world leading place to live, work and play.
Major Attractions	Vancouver will focus on more successfully marketing existing attractions while also working with potential developers of any new attractions.
Air Route Development	Vancouver will develop new direct and non-stop air routes through financial and marketing incentives.
Product Trials	<p>Vancouver will develop highly experiential short break products</p> <ul style="list-style-type: none"> ▪ Based on CTC data a key driver of visitors to Canadian destinations is “past travel.” ▪ This responds to market tendency for shorter, more frequent and highly experiential trips.
Celebrity Endorsements	During development of marketing campaigns, Vancouver will seek involvement of celebrities who are regular visitors and keen ambassadors. (e.g. “My Houston” and Vancouver’s “You Gotta Be Here.”)
Legacy Events	<p>Vancouver will host Signature travel trade conferences</p> <ul style="list-style-type: none"> ▪ E.g. Cruise 360, Routes, Rendezvous, etc.
Cruise Competitiveness	<p>Vancouver will develop a long term, well resourced cruise marketing program including value propositions to offset current cost barriers.</p> <ul style="list-style-type: none"> ▪ Subsidized air fares to make Vancouver total costs competitive.
Canada’s Events Capital	Vancouver will seek to implement a comprehensive events strategy designed to make it the Events Capital of Canada (e.g. Edinburgh and Melbourne models)
Recruitment	Government and industry will develop a bidding and sponsorship program to attract International Niche - Annual events.
Legacy Events	<p>Vancouver will host Signature meetings, conventions and exhibition conferences</p> <ul style="list-style-type: none"> ▪ E.g. MPI, CSAE, ASAE, PCMA, IAEM, UFI, etc.

Vancouver Needs Planned Reinvention

Meetings Innovation

Vancouver will become broadly acknowledged as the world's most innovative meetings destination.

- The focus will be on strategic business solutions, not real estate rental and hospitality management.
 - Thought leadership
 - New service models
 - Attendance promotion
 - Revenue generators
 - Co-creation on event design
 - Sustainability (Copenhagen Sustainable Meetings Protocol – CSMP type model)
 - Knowledge management
 - Meetings architecture
 - Meetings ROI / ROO
 - “Event Relationship Management”
 - Hybrid events (combining physical and virtual)

Positioning

Vancouver will position itself as a “world's central meeting place,” equidistant between Europe and Asia, and adjacent to the USA.

Industry Profile

Vancouver will work to build a Meetings Canada tradeshow as a platform for promoting Vancouver as the epicentre of the Canadian meetings industry.

Incentive Product

Vancouver will implement an incentive product development program.

Aboriginal Experiences

Vancouver will seek to support Aboriginal Tourism BC in marketing authentic aboriginal product.

Vancouver Needs to Go Even More Organic

Radical Transparency

Vancouver will seek to develop the world's most transparent approaches to social media and digital marketing.

- Facilitating organic proliferation of Vancouver related user generated
 - Major push on digital content / visitor generated reviews
 - Outsourced blog activity in full range of niche markets / celebrity bloggers
 - Wiki-Vancouver
 - Helping people find aps that include Vancouver content
 - "Self propelled holidays" online utilities that allow people to build their own itineraries

New Channels

Vancouver will be part of the seamless mobile universe – multilingual web and mobile channels

Syndication

Vancouver will use social media to extend its brand reach and stimulate virtual "word of mouth"

Extending and Activating the Fan Base

Vancouver will offer exclusive benefits to its fans, especially to those who become active advocates.

- Audit overall experience to identify and improve gaps in service delivery
- Engage previous visitors to recommend, develop and test "new" itineraries – create the product

Segment Development

Vancouver will identify all viable niche markets and improve product / market alignment to build stronger relevancy for the destination while marketing to them.

- **Cruise / Adventure / Accessibility / Green tourism / Families and multi-generational travel / ETC.**
- **GLBT** – Ability to get married and honeymoon
- **Culinary** – Cooking school experiences, sustainable food
- **Cultural** – Indigenous tourism
- **Study Tours** – ESL / languages / history / arts & craft / photography
- **Health & Lifestyle** – 100 mile diet, organic, local with known provenance
- **Ethnic markets** – e.g. US Hispanic and Chinese markets
- **VFR** – "Invite your Friends and Family" campaign

Incubating Product / Capacity Building

Supporting development of new visitor products / promotion

- Mentoring organizations on product development and accessing distribution channels and knowledge transfer (e.g. aboriginal tourism, cultural tourism, culinary tourism, etc.)
- Revitalizing and refreshing existing experiences and itineraries
- Community based task forces for different niche product areas, (eg. cultural, festivals and events, etc.)

Vancouver Needs BC, Canada and Others to be More Successful

Leveraging the Resources of Competitors

Vancouver will seek to strengthen cooperative international market development efforts between CTC, Provincial tourism organizations and major city CVBs.

- Based on GTW data a majority of the visitors resulting from Asia will come to Vancouver, and a fair share will come from Europe.

Packaging

Vancouver will work with other destinations to engage customers in creating diverse experiential package products.

Partnerships

Vancouver will develop marketing relationships with other BC destinations and US and Canadian cities to capitalize on opportunities to promote multi-city itineraries.

Incubation

Vancouver will seek development of a 50 – 50 matching grant program with Governments to internationalize existing City or Provincial Annual events or create new events with international potential.

Grants could be used for promotion, event enhancement or travel product development such as working with local suppliers to create and promote packages.

Diversification & Dispersion

Vancouver will work with provincial DMOs to inventory the provincial events calendar and set goals for creating a range of events that are geographically distributed, have tourism appeal and reflect British Columbia's artistic and cultural diversity.

Capacity Building

Vancouver will work with provincial DMOs to create a standard manual on events creation and provide technical assistance to local organizations seeking to establish, manage and operate new events.

Measurement

Vancouver will work with provincial DMOs to track visitor origins and spend at events happening in British Columbia.

While administering subvention programs, the Government should make payments contingent on the collection and reporting of quality data on not only events but also conventions, exhibitions and incentives.

Vancouver Needs to be More Competitive

Market Aggressiveness

Vancouver will seek to develop long term, dependable destination marketing resources that surpass those of its major competitors.

Air Cost Offsets

Vancouver will develop subsidized air fare packages for longer stay visitors.

Subvention

Government and industry will work together to develop a subvention policy.

This will include a sustainable subsidy program as well as development of an alternative model involving marketing support for exhibitor, sponsor and delegate participation. The program will be geared to risk minimization, providing marketing support to achieve negotiated financial outcomes, with cash subvention support only to cover shortfalls, and subvention reduction if outcomes are surpassed. Shared risk and reward. (Glasgow model)

Professional Network

Vancouver will broaden its ambassador programs into a community supported strategy to identify encourage and support local doctors, scientists, engineers and professionals to assume leadership roles in international associations. (Singapore model)

Association Community

Vancouver will develop a grant program to support the development of Canadian Chapters of international associations that will be headquartered in Vancouver. (Singapore model)

Incubation

Vancouver will seek to develop a program to provide financial and marketing support to national exhibitions that have potential for internationalising.

Subvention

Vancouver will seek to develop a program to provide marketing support to qualified international show producers geared toward attracting more North American and Asian exhibitors and buyers.

Partnerships

Vancouver will work with leading global show producers to identify gaps and opportunities for titles that they are producing elsewhere.

Joint Ventures

Vancouver's industry will work to develop JV arrangements with prospective show producers.

JV arrangements will reduce risks to potential new show producers in the current climate of risk aversion. They also provide an opportunity for sharing the proceeds of successful shows, providing capital for investment in other future JV arrangements.

Vancouver Needs to be More Competitive

Developing Travel Trade Key Accounts

Vancouver will identify, nurture and support key accounts in long haul markets that are selling, or have potential to sell, Vancouver based itineraries.

Incubating Vancouver Trade Specialists

Vancouver will develop a global network of accredited retail and trade travel specialists.

Initiating Long Haul Consumer Direct

Vancouver will expand its consumer marketing into key overseas markets in support of its travel trade programs.

Vancouver Needs a DMO that is “Us” not “Them”

Informed Decision Making

Vancouver’s supplier industry will work together to strengthen data collection systems that will provide factual insights into market driven decision making.

Agreed Performance Metrics

Vancouver’s supplier industry will work together to form a consensus on performance metrics to be used in measuring the success of the destination.

Branding

Vancouver will revisit the issue of its leisure branding to ensure that the branding approach resonates with audiences and the branding strategy receives broad industry understanding and support.

Agility

Vancouver will maintain marketing programs that are adaptable, scalable and nimble

- Real time tracking and real time industry wide shifts to changes in the marketplace

Market Intelligence

Vancouver’s industry will develop a highly specialised research capability designed to enhance an understanding of key issues relating to individual bids and thus aid in the development of successful bid strategies.

Business Branding

Vancouver’s industry will develop and project a strong business branding which will complement Vancouver’s and Canada’s leisure brand.

Value Proposition

Vancouver’s industry will work together to develop a strong and consistent value proposition that will be communicated during sales, marketing and bid processes.

This will include a strong focus on emerging standards in “Meeting ROI” and “Meeting Architecture.”.

Vancouver, Inc.

Vancouver will establish a coalition to build its corporate meetings business through a collective campaign.

- New campaign, collectively implemented.
- Identify gaps in the current market approach, and move into new priority markets for bidding on larger meetings and for developing leads on smaller meetings.

Implementation Approach

- 1. Identify Strategic Network** - Stakeholders will be consulted to form a list of organizations and individuals whose active engagement will be key to the successful implementation of the destination strategy.
- 2. Endorsement** - The *Rethink* Advisory Council will seek formal endorsement of the destination strategy from each of the organizations and individuals identified.
- 3. Implementation** - Phase 2 of *Rethink* will focus on the organizational and structural approaches, for the industry and within Tourism Vancouver, that will be needed to drive the strategy.

Phase 1: Destination Strategy

1. Destination Plan

- a. Vision, Mission & Values
- b. Goals
- c. Key Performance Indicators
- d. Strategies

2. Appendices (Discovery)

- a. Issues and Gaps
- b. *Rethink* Opportunities
- c. Customer and Stakeholder Market Scan
- d. Sources for this study

The Story in Canada

High Profile and Competitive.....

“In just four short years, Canada has become the most respected country brand in the world.”

Source, November 5, 2010 – article about 2010 Country Brand Index by Future Brand

“Canada is the highest ranked country in the region, ranked 5th out of 133 countries... (and overtaking) the United States this year for the top regional spot.”

2009 World Economic Forum National Tourism & Travel Competitiveness Rankings

But, Not Converting the Business.....

“According to Statistics Canada, (the first quarter of 2010 declined) 5.5 per cent from the comparable quarter of 2009. And 2009 was considered a poor year for tourism.”

“Canada appears to be falling out of favour as a tourist destination, ranked 15th last year in terms of tourist arrivals and receipts, falling from seventh in 2002, according to the UNWTO Tourism Barometer”

“Canada's travel deficit reached \$3.5 billion in the second quarter of 2010, a record high.”

Vancouver Sun – November 3, 2010

And, reducing the effort:

Canadian Tourism Commission Budget	2010	2011	2012
	\$104 M	\$80 M	\$72 M

Brand Issues - Canada

Product Strengths

- Landscapes
- Nature
- Water Scenery

Product Weaknesses

- Culture
- Local Flavours
- Aboriginal Culture
- Historical

Icons

- Mountains
- Maple Leaf
- Niagara Falls
- Nature / Wilderness

Brand Weakness

Authentic



Testing on Brand Canada Personality Traits

Warm, Intriguing, Youthful, Informal, Authentic, Open, Witty, Confident

Resonated

- Easiest for business
- Ease of travel
- Outdoors / Sport
- Friendly locals
- Conferences
- Resorts / Lodging
- Safety
- Political Freedom
- Natural Beauty
- Extend business trip
- Environmental
- Ideal for business
- Desire to visit / visit again

Didn't Resonate

- Authenticity
- History
- Art & Culture
- Rest & Relaxation
- Value for Money
- Fine Dining
- Shopping
- Nightlife

Source: *Future Brand rankings for 2008, GG&Co Analysis*

What is Being Said About Vancouver

Canada's "Most Walkable City"

Up! Magazine. 2010

"Top 10 of the World's Ultimate Sports Cities"

SportBusiness Group, 2010

"Top Canadian Destination" (7 years running)

Travel Weekly – 2009

"Best City in the Americas" (5th time in 7 years)

Conde Nast Readers Choice Awards – 2009

"Top North American Destination for International Meetings"

ICCA – 2009

"World's Most Livable City"

The Economist Intelligence Unit – 2009

"Top City for Business Travel" (3 years running)

The Economist Intelligence Unit – 2008

"#1 Gay Leisure Travel Destination in Canada" (3rd year running)

Community Marketing - 2008

Brand Issues - Vancouver

Vancouver has a strong international brand...



International City Brands

- **Vancouver #8 (from 16 in 2006)**
- **Montreal #10**
- **Toronto #11**

Criteria:

- Presence** – International standing
- Place** – Perceptions of physical aspects
- Pulse** – Vibrant urban lifestyle
- Prerequisites** – Affordable accommodation and public amenities
- People** – Warm, friendly and safe
- Potential** – Economic opportunities, jobs, business, education

Source: Anholt City Brands Index, 2007

City Ratings by Canadians			
	Vancouver	Toronto	Montreal
Vacation	23%	4%	14%
Live in	14%	10%	11%
Sports & Rec	14%	23%	12%
Best City Overall	13%	11%	12%
Eat Out	11%	17%	31%
Arts & Culture	7%	23%	22%
Shopping	6%	25%	30%
Do Business	4%	37%	14%
Nightlife	0%	6%	41%

Source: Angus Reid, Canada's Best Cities, 2007



But, is not recognized for key attributes that are essential to attracting tourists and conventions.

Challenges Vancouver Faces

- Economic Threats
 - World Financial Crisis
 - CDN Exchange rate
- Restrictive government policy
 - Air Canada will be OK, but, what about the tourism industry?
 - Helping Seattle to undermine your cruise industry
 - Creating visa barriers to growing markets
 - Cutting CTC's budget the minute you were ready to "harvest the Olympic afterglow" (9 months lost and counting.....)
 - Changes to Tourism BC might affect its marketing effectiveness and results
- Industry Structural Weaknesses
 - Lack of cohesion and unity exacerbated by shifting government policy and taxation
 - Lack of research to underpin facts based decision making
 - Lack of a clearly understood and supported branding strategy

Vancouver Doesn't Have

- A Tourism Master Plan
 - Festival / Events Development Strategy
 - Destination based Sports Strategy
 - DMO Funding Strategy
 - Product Strategy
 - Sustainable Tourism Strategy
 - Infrastructure Strategy
 - Research Strategy

Phase 1: Destination Strategy

1. Destination Plan

- a. Vision, Mission & Values
- b. Goals
- c. Key Performance Indicators
- d. Strategies

2. Appendices (Discovery)

- a. Issues and Gaps
- b. *Rethink Opportunities***
- c. Customer and Stakeholder Market Scan
- d. Sources for this study

Government Policies that Enable Success

Discussion

There is a broadly expressed industry view that many government policies, especially at the national level, are barriers to success. Examples are:

- Reduced funding for marketing Canada
- Air service restrictions
- Taxes and fees that make Canada uncompetitive on price
- Market disruptive customs and immigration regulations

Issues

Like their counterparts in other countries, the tourism industry in Canada has had limited success at influencing government policy. Commonly heard during interviews was that the industry is “marginalized” when it comes to policy. **The rethinking here relates to clarity on who is at fault and what to do about it.** It is likely that if government isn’t listening to industry, they aren’t thinking it’s their fault.

Opportunities

- **One Voice** – The tourism industry could agree on which organizations speak for the industry at the national, provincial and local level. Then those organizations could agree to what they are saying.
- **Vancouver Tourism Master Plan** – The industry and the City of Vancouver in consultation with the BC Provincial government could pursue a collaborative Master Planning effort that would define a clear way forward, including government policy frameworks.
- **BC Tourism Ministry** – The appointment of a new Minister and Deputy Minister may offer a new opportunity for the industry to become more effectively engaged in provincial policy.

Planned Reinvention

Discussion

Branding surveys, clients and local stakeholders all agree that Vancouver is a great destination. However, they also recognize that the city has real or perceived product deficiencies. **When rethinking product, even destinations that are seen as “having it all” need reinvention – so will Vancouver – always.**

Issues

Shopping, dining and nightlife aren't differentiators, they're mandatory. Montreal is seen as having them in a big way, and Vancouver isn't. Even many local stakeholders say the destination needs more excitement. Visitors see all of Canada as lacking in culture and history and not being “authentic.” Everyone agrees that Vancouver needs to develop itself into an all-season destination.

Opportunities

- **Strengthening Attractions** – Increase awareness of the quality and diversity of existing attractions while supporting possible developments of new assets that provide additional reasons to return.
- **Festivals & Events** – That showcase culture and create more vibrancy and excitement year-round.
- **Product Development** – That fill gaps and satisfy niche interests.
- **Legacy Events** – That showcase Vancouver's expanded capabilities.
- **Value Propositions** – That are consistently expressed and resound with key markets.

An Even More Organic Market Approach

Discussion

When resources are limited, the “wiki” model can be fast and relatively inexpensive. Though less controlled, stimulating the “blogosphere” could also heighten and broaden Vancouver’s reach. Local activists could be put to use in both content and product development.

Issues

Vancouver is already using organic marketing approaches. **Rethinking further extensions of organic strategies will help to ameliorate resource limitations.** In other words, when funds are tight, get your team to find armies that you don’t have to feed.

Opportunities

- **Leverage the Fan Base** – User generated content / applications / niche driven social media.
- **New Channels** – Multi-lingual web and mobile channels.
- **Networked Outreach** – Industry sharing and relaying content through their own virtual channels.
- **Product Farming** – Mentoring groups to create, promote and distribute new product.
- **Activate the Local Host Community** – Getting more professionals to invite conventions and meetings (e.g. “Be a Host”) and encouraging more people to invite friends and relatives to Vancouver (e.g. “Invite the World.”)

Helping BC, Canada and Others to Be More Successful

Discussion

When foreign visitors come to Canada, Vancouver gets a fair share, or better. When any visitor comes to BC, Vancouver is part of the itinerary. When distributors prefer selling Vancouver product, the destination gets the business. If Vancouver spends even more of its focus on helping BC, Canada and others to be more successful, its own success will follow. And, they may even repay the generosity.

Issues

CTC's budget cuts mean a lost opportunity for Vancouver. A stronger BC effort is a major opportunity for Vancouver. **Rethinking ways to be creative in helping others will synergize more business that will naturally come Vancouver's way.**

Opportunities

- **Oh? Canada???** – Cooperatively grow Canada's market presence.
- **More BC Product** – If there's more reason to come to BC, more will visit Vancouver.
- **More Multi-Destination Packages** – Vancouver as part of broader itineraries.
- **More Trade Specialists** – Their success is Vancouver's success.

Making Vancouver More Competitive

Discussion

Being competitive:

- Marketing resources
- Price/value
- Market potential (lower risks, higher rewards)
- Local contacts with global networks

Issues

The market is becoming more intensely competitive. More product and more viable destinations mean more choices for customers. Vancouver has done relatively well, with relatively less, but, the DMO won't be competitive if Vancouver is complacent about it being significantly out-gunned by its primary competitors. Vancouver is seen by some event producers as a smaller, riskier, and yes, in some instances, more expensive market. Vancouver also has a smaller corporate base and a shorter list of local contacts. **Major rethinking is needed to correct competitive deficiencies.**

Opportunities

- **Market Reach** – Competitive resource levels with dependable revenue stream.
- **Cost off-sets** – For key markets when Vancouver prices are a disincentive.
- **Subvention** – Competitive development funding for conventions and exhibitions.
- **Joint Ventures** – For event producers who are risk adverse.
- **Larger Host Community** – More corporate and association headquarters which provide local contacts to support bids and hosting activities for conventions.

Building a DMO that is “Us” not “Them”

Discussion

Tourism Vancouver is not the only DMO in the world that is popularly viewed as “over there – that building, that staff, that board.” However, when an entire industry starts talking about “we” instead of “they” there can be enormous power in the collaboration. It’s about ownership and accountability. The stakeholders own it. So, **when stakeholders are rethinking DMO accountability, they should embrace the notion that they are actually holding the entire industry accountable in the process.**

Issues

The most successful organizations have:

- Facts based decision making
- Tight feedback loops
- Strategic synergies
- Powerful knowledge
- Effective communications

Opportunities

- **Unified Approach** – Market strength in numbers.
- **Brand Strength** – Developed, supported and projected by the industry as a whole.
- **Collective Intelligence** – Industry based data and market intelligence gathering.
- **Consistent Messaging** – Industry-wide projection of value propositions and promotional themes.
- **Industry Based Campaigns** – DMO facilitating collective campaigns to round out destination efforts.

Phase 1: Destination Strategy

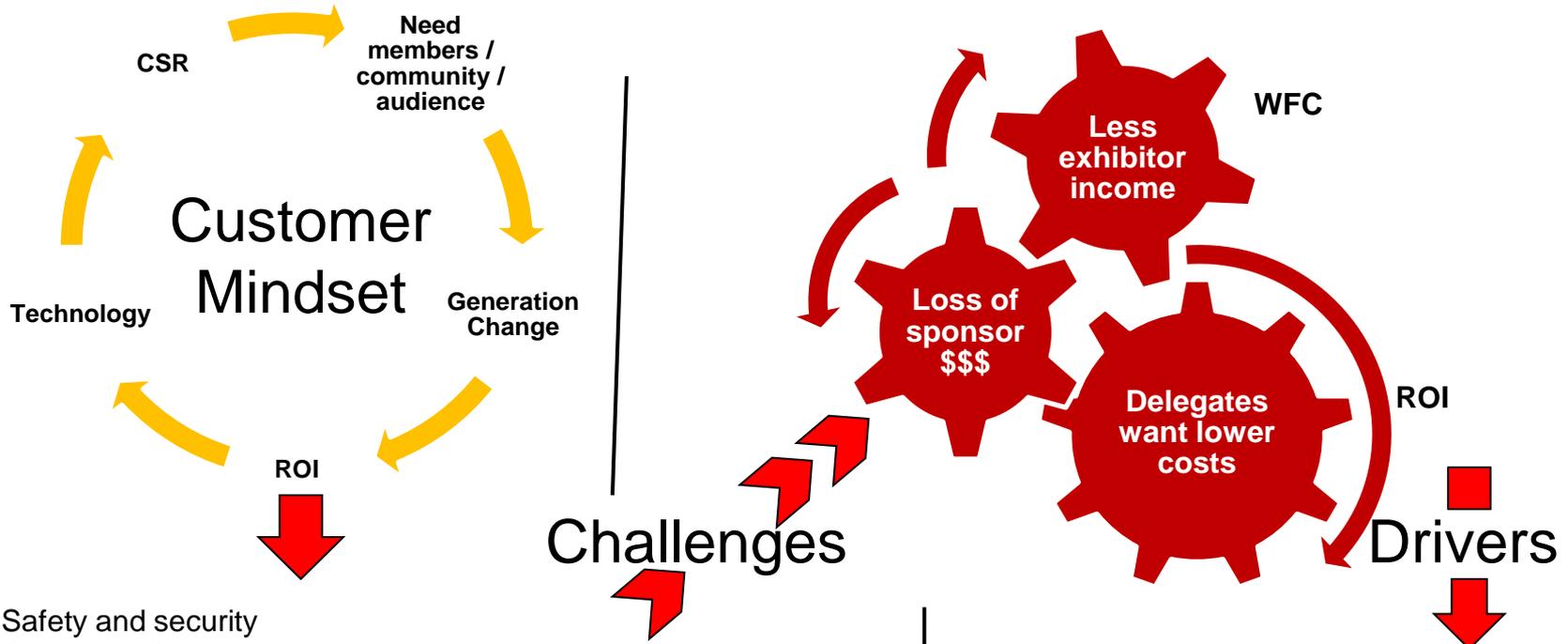
1. Destination Plan

- a. Vision, Mission & Values
- b. Goals
- c. Key Performance Indicators
- d. Strategies

2. Appendices (Discovery)

- a. Issues and Gaps
- b. *Rethink Opportunities*
- c. Customer and Stakeholder Market Scan
- d. Sources for this study

Association trends identified through market testing



- Safety and security
- Guaranteed success
- Delegate counts / customized experiences
- Focus on “meetings architecture”
- Risk minimization / resistance to attrition clauses
- Social media / networking to build communities
- Content specialization
- Delegates looking for lower costs
- Move toward 2nd tier destinations (1st tier fighting back)
- Emerging markets = new member communities
- Support for delegates from developing countries for international meetings
- Destination risks = resource access, commodity prices, environmental degradation, nationalism, fundamentalism, social unrest, corruption, IP theft, crime and cyber-security.

- Revenues / sponsorship / subvention
- Lower costs / **value**
- Transparency
- Growth in professional management
- Outcomes in partnership with destinations
- Convenient facility packages
- Destinations not perceived as junkets
- Local support for international meetings

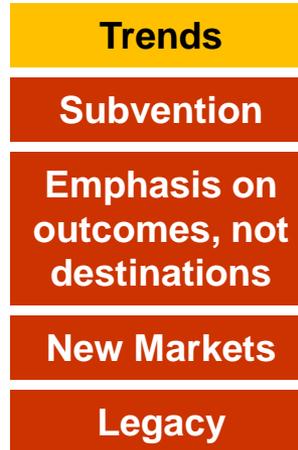
A globalizing convention market will become even more intensively competitive for North American destinations

- **Generational change**

- As Baby Boomers retire, Generations X and Y are taking over. They are connected and ROI focused.

- **Globalization**

- The new reality for associations is that as the world goes global so must they. The future member base of associations is demanding global engagement, global knowledge and global networks.



- **Cost and Value Driven**

- More professionally managed
- Pressured to deliver more for less
- Losing traditional revenue streams (e.g. pharmaceutical support)
- Procurement mentality in international market

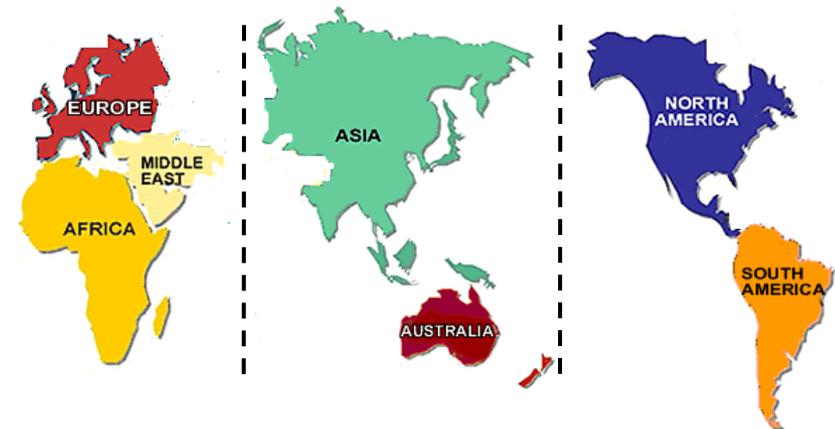
- **CSR**

- More a differentiator than a driver, but Vancouver's green image could be a competitive advantage

- **Tri-polar event rotation**

- The association world is increasingly becoming tri-polar
 - Europe, Africa and Middle East
 - The Americas
 - Asia

Fewer rotations of International conventions into North America, while US associations will begin to include rotations outside of North America.



- **An increasingly crowded market:**

- BRIC: The biggest emerging economies are Brazil, Russia, India and China.
- With EU integration, more Eastern European destinations are getting market ready.
- Within 10 years most major African cities will be getting market ready.
- The Middle East, and especially the GCC are getting market ready.
- Asia is coming on strong.

North America Convention SWOT

Strengths

- #1 Western Canadian destination
- New Vancouver Convention Centre
- Gateway for Asian delegates
- Good reputation
- Natural credentials
- Safe urban environment
- Food product
- Hotels
- Cosmopolitan
- Facility package
- Value

Weaknesses

- Air Access (capacity & lift)
- Lack of Low Cost Carriers (LCCs)
- Distance to East Coast Market
- Air Canada protectionism / air costs high
- Lack of Profile
- Perception of climate
- Government policy (visas / lack of support)
- Limited corporate and association base
- Non-competitive subvention funding
- Limited destination sales budget
- Lack of supplier industry unity

Opportunities

- Mayor and Council interest in alignment
- Conventions in VEDC's new strategy
- DMF as an alternative funding source
- Growing Vancouver's association base
- Growing Vancouver's corporate base

Threats

- CDN exchange rate
- Global economy and slow US recovery
- Workforce shortages
- Worsening border clearance issues
- Competitors giving away space
- Competitors offering large subvention packages
- HST lowering rooms tax revenue streams
- Losing Olympic momentum
- Short term hotel focus
- Not being planned and proactive on global rebound

International Convention SWOT

Strengths

- Midway between Europe & Asia / next to USA
- New Vancouver Convention Centre
- Good reputation
- Safe urban environment
- Food product
- Hotels
- Cosmopolitan
- Facility package
- Value
- Green credentials

Weaknesses

- Air Access (capacity & lift)
- Poor open-skies policy
 - Air France only allowed into Montreal & Toronto
 - Air Canada protectionism – high loads, no growth
 - Difficulty in interlining and code sharing if not Star
 - Non-alignment between 5th freedoms and visa policies
- Visa Policies
- Cost on longer hauls
- Lack of Profile
- Limited local contacts
- Non-competitive subvention funding
- Limited destination sales budget
- Lack of supplier industry unity

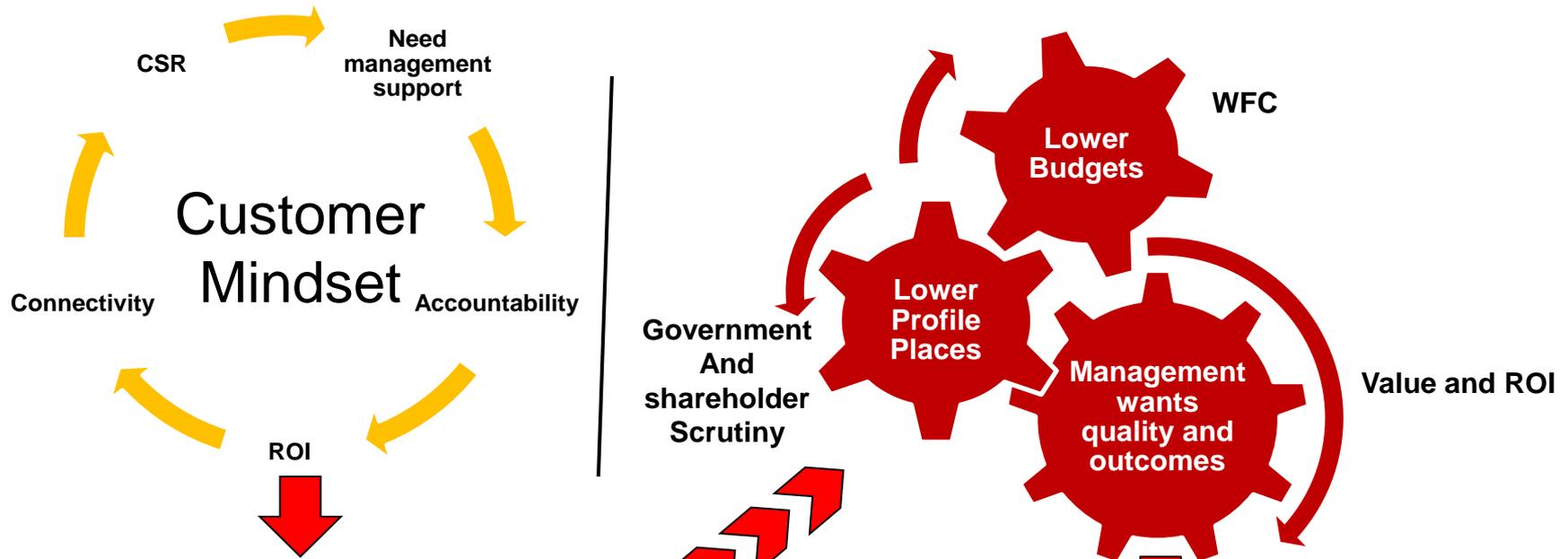
Opportunities

- Conventions in VEDC's new strategy
- DMF as an alternative funding source
- Growing Vancouver's association base
- Growing Vancouver's corporate base
- West Jet interlines with CX into US / Canada
- Increased service by Chinese carriers
- Open skies with EU

Threats

- CDN exchange rate
- Global economy
- Workforce shortages
- Worsening border clearance issues
- Competitors giving away space
- Competitors offering large subvention packages
- HST lowering rooms tax revenue streams
- Losing Olympic momentum
- Short term hotel focus
- Not being planned and proactive on global rebound
- Globalization / world smaller and more competitive

Corporate meetings trends identified through market testing



Meeting affects:

- Safety and security
- Execs in decision process
- ROI on product launch impacts
- Meetings more results driven
- Shorter haul, shorter lead times
- Smaller meetings / shorter duration
- Avoiding high-end venues – “cheaper is chic-er”
- Extending communications outside the building
- Online tools in decision making
- Corporations consolidating business travel services to global partners

- Perceptions – not appearing frivolous
- Less glamour, more experience / business
- Value - lower costs and higher services
- Transparency
- Outsourcing and tech-sourcing
- Procurement (3 proposals)
- Results, not logistics
- Feel safe, trust, in good hands
- CSR

Corporate Meeting SWOT

Strengths

- Good reputation
- Natural credentials
- Safe urban environment
- Food product
- Hotels
- Cosmopolitan
- Value

Weaknesses

- Air Access (capacity & lift)
- Air Canada protectionism / air costs high
- Lack of Profile
- Relatively small market
- Perception of climate
- Limited corporate base
- Non-competitive subvention funding
- Limited destination sales budget
- Lack of supplier industry unity

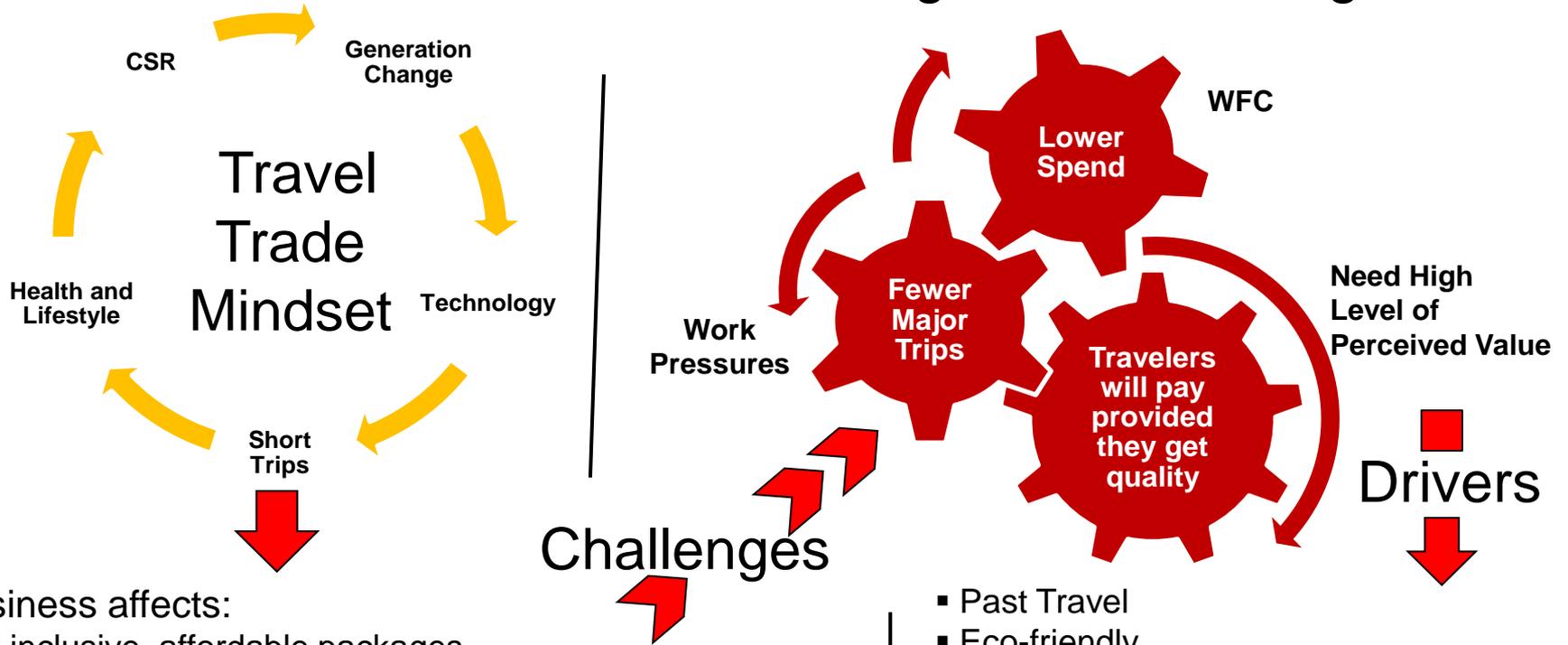
Opportunities

- Mayor and Council interest in alignment
- DMF as an alternative funding source
- Growing Vancouver's corporate base
- Short term business

Threats

- CDN exchange rate
- Global economy and slow US recovery
- Workforce shortages
- Worsening border clearance issues
- Competitors offering large subvention packages
- HST lowering rooms tax revenue streams
- Not being planned and proactive on global rebound

Leisure trends identified through market testing



Business affects:

- All inclusive, affordable packages
- Commission adverse / skeptical of agents
- Competing distribution channels
- Shorter lead times on bookings
- Influence of internet and social media
- Demographic divergence – older travelers and Gen X with different interests and expectations
- Families travelling together
- More choice, more destinations
- Short (more frequent) breaks - compact, experiential visits
- Good experiences = repeat trips for further discovery
- People staying closer to home

- Past Travel
- Eco-friendly
- VFR
- Active self propelled holidays
- Perceptions
- Value - lower costs and higher services
- Low cost air
- On-line referrals / word of mouth
- Green and responsible
- Authentic experiences
- New experiences, new places
- Highly customized
- Specialist agents
- Destination profile / “what’s hot”

North America Leisure SWOT

Strengths

- Safe cosmopolitan environment
- Food product
- Hotels
- Value
- Natural environment and scenic landscapes
- Proximity

Weaknesses

- Air Access (capacity & lift)
- Cost of flights from East Coast
- Lack of Profile
- Limited destination sales budget
- Lack of supplier industry unity
- BC real GDP from 4% growth in 2010 to 2.5% in 2011 (CBC)
- CTC cancelling investment in US market

Opportunities

- Tourism in VEDC's new strategy
- DMF as an alternative funding source

Threats

- CDN exchange rate
- Global economy and slow US recovery
- Workforce shortages
- Worsening border clearance issues
- HST lowering rooms tax revenue streams
- Losing Olympic momentum
- Not being planned and proactive on global rebound
- US promoting domestic tourism (new NTO)

International Leisure SWOT

Strengths

- Safe cosmopolitan environment
- Food product
- Hotels
- Value
- Closest major West Coast airport to Asia
- Natural environment and scenic landscapes

Weaknesses

- Air Access (capacity & lift)
- Poor open-skies policy
 - Air France only allowed into Montreal & Toronto
 - Visas
 - Air Canada protectionism – high loads, no growth
 - Difficulty in interlining and code sharing if not Star
 - Non-alignment between 5th freedoms and visa policies
- Cost on longer hauls
- Lack of Profile
- Limited destination sales budget
- Lack of supplier industry unity

Opportunities

- Tourism in VEDC's new strategy
- DMF as an alternative funding source
- West Jet interlines with CX into US / Canada
- Increased service by Chinese carriers
- US pre-clearance for PAX arriving on foreign flags which can't get US slots
- Open skies with EU
- 40% of world's economic growth from 2008 – 2018 will come from BRIC economies (Ernst & Young)
- Asia's real GDP has grown twice as fast as the US or the EU since 1995 (The Economist)

Threats

- CDN exchange rate
- Global economy
- Workforce shortages
- Worsening border clearance issues
- HST lowering rooms tax revenue streams
- Losing Olympic momentum
- US an easier sell / diversity / appeal / higher profile
- Not being planned and proactive on global rebound

Cruise Market SWOT

Strengths

- Safe cosmopolitan environment
- Food product
- Value
- Location relative to Alaska
- Inside Passage most scenic route

Weaknesses

- Cruise has gone from 1.25 M down to 600,000 Pax
- 10 years ago 100% of Alaska cruises used Vancouver, now 50% or less
- 5 month season vs. all season
- Increased cost to cruises of stop in Vancouver
- Flight costs into YVR for cruise passengers

Opportunities

- Stronger coop marketing for cruise
- Possible economic case for \$30 M CapEx in older terminal (needs decision by 2017)
- Inside Passage is most scenic route

Threats

- CDN exchange rate
- Business moving to Seattle
- Average cost to fly into Vancouver is \$200 more than Seattle.
- Seattle investment in facilities. Their business case is economic development (loss leader) Vancouver's requires ROI
- Government policy
 - \$50 million on Victoria terminal / no overnights
 - Victoria terminal offers shorter, cheaper route
 - Clearances at sea in bad weather / no stops at all
 - Average cruise ship visit impact of \$150,000 in Victoria vs. \$2 Million (+) in Vancouver

Phase 1: Destination Strategy

1. Destination Plan

- a. Vision, Mission & Values
- b. Goals
- c. Key Performance Indicators
- d. Strategies

2. Appendices (Discovery)

- a. Issues and Gaps
- b. *Rethink* Opportunities
- c. Customer and Stakeholder Market Scan
- d. Sources for this study

Panels

Special thanks to the many businesses, organizations and individuals that supported this planning process through their generous participation in discussion panels:

Project Leaders

Rethink Advisory Council

Providers

Hotel Association of Vancouver
Vancouver Hotel Destination Association
PavCo / Vancouver Convention Centre
City of Vancouver
Vancouver Port Authority
Vancouver International Airport Authority
Ministry of Tourism, Culture & Arts (Tourism BC)
Vancouver Attractions Group
Canadian Tourism Commission

Tourism Vancouver Board

Tourism Vancouver Members Forum

Tourism Vancouver Management Team

Tourism Vancouver Staff

Allies

Vancouver Coast & Mountains Tourism Region
Tourism Richmond
Tourism Whistler
Tourism Victoria
BC Destination Marketing Organization Association
Council of Tourism Associations
BC Hotel Association
Canadian Inbound Tourism Association
Sports Organisations
Aboriginal Tourism BC
Alliance of Arts & Culture

Affiliates

Vancouver Board of Trade
BC Business Council
Capilano University
Simon Fraser University
BC Institute of Technology
Vancouver Community College
Vancouver Economic Development Commission
Representatives from business associations

Individual Interviews in Vancouver

Special thanks also to the following individuals for sharing their time and expertise during the course of this study:

- Ms. Judy Adams, Managing Director, Engaging Tourism and Hospitality Operators in Sustainability
- Mr. Amir Ali Alibhai, Executive Director, Alliance for Arts and Culture
- Dr. Penny Ballem, City Manager, City of Vancouver
- Mr. Jean Luc Barone, General Manager, The Westin Bayshore Hotel
- Mr. Graeme Barrit, President, Coast Hotels & Resort
- Mr. Larry Berg, President and CEO, Vancouver International Airport Authority
- Mr. Warren Buckley, CEO, PavCo
- Ms. Ingeborg Carr, VP Marketing, Tourism Richmond
- Mr. Raymond Chan, Assistant Deputy Minister Strategy and Policy Division, Ministry of Tourism, Culture & Arts
- Mr. James Chase, Chief Executive Officer, BC Hotel Association
- Mr. Ken Cretney, General Manager, Vancouver Convention Centre
- Mr. Scott Galloway, Director of Trade Development, Vancouver Port Authority
- Ms. Marion Harper-Treskin, General Manager, The Westin Grand Vancouver Hotel
- Mr. Keith Henry, Chief Executive Officer, Aboriginal Tourism Association of BC
- Mr. Mike Hurst, Consultant, MD Hurst & Company, on behalf of Vancouver Convention Centre
- Ms. Tracy Lakeman, CEO, Tourism Richmond
- Mr. Peter Larose, Director Policy & Corporate Communications, Council of Tourism Associations
- Mr. Grant MacKay, Assistant Deputy Minister, Consumer Marketing Division, Ministry of Tourism, Culture & Arts
- Mr. Doug McCandless, Director of Sales, Capilano Suspension Bridge
- Ms. Michele McKenzie, President and CEO, Canadian Tourism Commission
- Ms. Linda Oglov, Consultant on behalf of VEDC, Vancouver Economic Development Commission
- Mr. Stephen Regan, President and CEO, Council of Tourism Associations
- Mr. Kevan Ridgway, President and CEO, Vancouver Coast & Mountains Tourism Region
- Ms. Susan Rybar, Assistant Deputy Minister, Ministry of Tourism, Culture & Arts
- Mr. Dan Stefanson, Executive Director, Tourism Abbotsford
- Ms. Robin Sylvester, President and CEO, Vancouver Port Authority
- Mr. James Terry, Executive Vice President, Rocky Mountaineer
- Ms. Lori Wanamaker, Former Deputy Minister, Ministry of Tourism, Culture & the Arts
- Mr. Greg Wirtz, Manager Trades Development, Vancouver Port Authority

Market Testing

A broad range of client and supplier interviews and focus groups were conducted to inform this study. The chart below shows the segment and geographical distribution of these discussions.

Clients

Segment	Type	Canada	US	EU	Mex/SA	Asia	Aus/NZ
Conventions	AMCs / PCOs / in-house/ CAB	●	●	●			
Incentives	Corporate / In-house	●	●	●	●	●	●
Exhibitions	PEOs / Companies	●	●	●		●	
Corporate	Corporate / In-house	●	●				
Tour	Ops / Wholesalers	●	●	●	●	●	●
Leisure	Agents	●	●	●	●	●	●

Suppliers

Segment	Type	Canada	US	EU	Mex/SA	Asia	Aus/NZ
All	DMOs	●	●	●		●	
Conventions	Venues	●	●	●		●	●
Conventions	PCOs			●		●	●
Incentives	DMCs			●		●	●
Conventions	Service Companies	●	●				
All	Hotels	●	●				
Leisure	Airline	●	●	●		●	

Interviews were conducted by telephone and during international trade events including AES and IMEX (Frankfurt), DMAI (Ft. Lauderdale), MPI (Vancouver), CIBTM (Beijing), Asia for Asia Summit and IT&CMA (Bangkok), ITB Asia (Singapore) and ICCA (Hyderabad.)

References

The following articles, documents, and studies were reviewed as part of the ***Rethink*** destination strategy development process:

- 2010 Joint Tourism Olympic Strategy - Olympic Consortium
- 2010 Olympics Plan - Tourism Vancouver
- 2011 Tourism Outlook Briefing (PPT) – Conference Board of Canada – September 2010
- Aboriginal Tourism BC Blueprint Strategy, Tourism Performance Review - Aboriginal Tourism BC – November 2009
- Anholt City Brands Index , How the World Views Its Cities, Third Edition 2007 – February 2008
- Anholt-GfK Roper Nation Brands Index 2008 Global Report for Media Reference – September 2008
- Anholt-GfK Roper Nation Brands Index Report Highlights – September 2008
- Anholt-GMI Nation Brands Index - GMI – 2nd Quarter 2005
- Anholt-GMI City Brands Index . How the World Sees the World’s Cities – March 2006
- Anholt Nations Brand Index Special Report , Quarter 1 2007– GMI – May 2007
- Asia Pacific Tourism, A Global Consumer Viewpoint – CNN, Global Travel and Tourism Survey by Synovate – May/June 2010
- B.C. Tourism Industry Viability and Competitiveness, Sample of Key Proposed Indicators – Council of Tourism Associations – April 2010
- be Vancouver , a Brand Toolkit for Members and Partners of Tourism Vancouver - Tourism Vancouver – 2008
- Canada’s Economy Profile, Travel and Tourism Competitive Report – 2009 World Economic Forum – February 2009
- Canadian Lodging Outlook – Smith Travel Research and HVS Canada – August 2010
- Canadian Lodging Outlook December 2009 – Smith Travel Research and HVS Canada – February 2010
- Canadian Lodging Outlook May 2010 – Smith Travel Research and HVS Canada – June 2010
- Canadian Weekly Hotel Review – Smith Travel Research and HVS Canada - June 20 to June 26, 2010
- Country Brand Index 2006: Insights, Findings and Country Rankings – Future Brand – November 2006
- Country Brand Index 2007: Insights, Findings and Country Rankings – Future Brand – November 2007
- Country Brand Index 2008: Insights, Findings and Country Rankings – Future Brand – November 2008
- Country Brand Index 2009: Executive Summary – Future Brand – November 2009
- Convention 2020-the Future of Exhibitions, Meetings and Events – Rohit Talwar and Tim Hancock – October 2010
- Effects of Citywide Conventions on Vancouver Hotels (2008)– Price Waterhouse Coopers – May 2009
- The Future of Destination Marketing – Karl Albrecht International for DMAI Foundation – May 2008

Continued on next page

References (continued)

- Global Tourism Watch Year 2: Australia Key Findings– Canadian Tourism Commission – April 2009
- Global Tourism Watch Year 2: China Key Findings – Canadian Tourism Commission – May 2010
- Global Tourism Watch Year 2 :Germany –Key Findings – Canadian Tourism Commission – April 2009
- Global Tourism Watch Year 2: Japan Key Findings – Canadian Tourism Commission – April 2009
- Global Tourism Watch Year 2: South Korea Key Findings – Canadian Tourism Bureau – April 2009
- Global Tourism Watch Year 2: UK Key Findings – Canadian Tourism Commission – March 2009
- Global Tourism Watch Year 2: U.S. Key Findings – Canadian Tourism Commission – June 2009
- Global Tourism Watch Year 3: Mexico Key Findings – Canadian Tourism Commission – August 2009
- Global Tourism Watch Year 3, Summary Report 2009 – Canadian Tourism Commission – November 2010
- Green Paper on B.C's Destination Marketing Network: Funding and Structure – Ministry of Tourism, Culture, & Arts – December 2009
- GVRD Attractions Report – Tourism British Columbia – Year End 2008
- Insights into Conversion Potential for B.C. and Sub-regions – Canadian Tourism Commission – October 2009
- Looking to 2020. The Future of Travel and Tourism in Canada Whitepaper – National Travel and Tourism Coalition – October 2010
- National Market Report January to December 2008 / Trends in the Hotel Industry 2009 – PKF Consulting Inc. – June 2010
- Outlook 2009/2010 – Accommodation Industry Outlook Forum (PPT) – PKF Consulting Inc. – October 2009
- Rating Canada's Cities, National Public Opinion Poll – Angus Reid Strategies – August 2007
- Sports Scotland Strategy – 2009
- STR Monthly Hotel Review December 2009 - Smith Travel Research - January 2010
- Summary of Foresight: Shaping a Sustainable Vision for Tourism in British Columbia – Council of Tourism Associations – June 2007
- Tourism Vancouver's 2008-2015 Strategic Plan (PPT)– Tourism Vancouver – May 2007
- Tourism Vancouver Brand Blueprint – Tourism Vancouver – June 2005
- Tourism Vancouver Draft 2010 Marketing Plan for Input and Discussion (PPT) – Tourism Vancouver - October 2010
- Tourism Vancouver Strategic Plan 2008-2015 Executive Summary - Tourism Vancouver - September 2007
- Towards 2017: A Strategic Blueprint for TIAC – September 2010
- Travel and Tourism Competitive Report 2009 – World Economic Forum – February 2009
- Update on Projections from the 2015 Strategic Plan (PPT) – Tourism Vancouver – June 2010
- Vancouver 2020 - Action Plan for Becoming the World's Greenest City by 2010 – Greenest City Action Team – October 2009
- Vancouver Future Tense (PPT) – Tourism Vancouver – September 2010
- Vancouver Sports Event Marketing Strategy - M.D. Hurst & Company – June 2010
- YVR: Your Airport 2027 – 20 Year Master Plan – Vancouver Airport Authority – December 2008

This study is presented by the
Rethink Vancouver Advisory Council

Chair

James Terry, Executive VP
Rocky Mountaineer

Deputy Chair

Mark Andrew, Reg. VP Pac NW & GM
The Fairmont Hotel Vancouver

Council Members

Larry Donen, Chief Brand Steward
JAMJAR Brands

*Virginia Greene, President and CEO
Business Council of British Columbia

Steve McNally, GM
Hyatt Regency Vancouver

Chris Simpson, Director
Vancouver All Terrain Adventures

Nancy Stibbard, President/Owner
Capilano Suspension Bridge

* Deceased