

VANCOUVER / TOURISM / MASTER PLAN



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INTRODUCTION

Tourism Vancouver, the official destination marketing organization for Vancouver, the City of Vancouver, and the Vancouver Economic Commission, collectively known as the Partners, commissioned the production of the Tourism Master Plan (TMP) for Vancouver to:

“guide and provide specific recommendations for the policy and planning framework that will ensure that the tourism industry grows in a manner that is economically, socially and environmentally sustainable and thus able to meet the future needs of residents, visitors, investors and other stakeholders.”

This Tourism Master Plan Overview summarizes the research carried out and the recommendations made by Resonance Consultancy Ltd. in the development of a Tourism Master Plan between December 2012 and June 2013.

Tourism Vancouver initiated the Tourism Master Plan based on recommendations laid out in the *Rethink Vancouver* report (see page 4). The City of Vancouver has been an active partner in the development of this Tourism Master Plan, contributing expertise, advice and resources to all aspects of its development. The Vancouver Economic Commission also contributed its experience and expertise on issues related to tourism investment and growing Vancouver’s tourism industry.

A broad range of input and ideas have been considered as part of this process, with more than 180 one-on-one stakeholder interviews conducted by Resonance Consultancy and participation of more than 2,000 Vancouver residents and business leaders via an online survey – through

which more than 11,000 comments and ideas were submitted.

Based on this input, research and analysis, key issues and opportunities for potential products, amenities, programming and experiences broadly supported by both the tourism industry and Vancouver residents have been identified in areas such as transportation, visitor experience, events, product development, partnerships and alliances, tourism infrastructure, marketing of neighbourhoods, and public affairs and advocacy on tourism-related policies and issues. While the focus of the Tourism Master Plan is on the City of Vancouver, references to the broader region of Metro Vancouver appear throughout the document.



BACKGROUND



BACKGROUND



This TMP follows the *Rethink Vancouver* visioning process conducted in 2011, which recommended seven actions be taken by Tourism Vancouver, including the creation of a Tourism Master Plan.

The idea behind *Rethink Vancouver* was to carry out a year-long strategic assessment and visioning process that would respond to two key questions:

1. What is it that the 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 2011?

In the *Rethink* project, Vancouver's tourism leaders and stakeholders first worked together to develop a destination strategy. Second, an organization strategy was developed which has far-reaching implications on how the industry works together in pursuit of these destination goals, and how Tourism Vancouver organizes itself in the future.

The beginning point of the destination strategy was to establish a consensus on what Vancouver's tourism industry wanted to accomplish together. First, a shared vision, mission and values were established. Then high-level goals were developed which, when accomplished, would effectively mean that Vancouver had achieved its mission.

The shared vision was developed during a series of meetings with Vancouver's tourism industry stakeholder groups. Key themes that emerged in the discussions were that the vision should be customer focused, should relate to more visitors coming to Vancouver and be measurable. What emerged was a clear consensus that Vancouver needed to be a high profile, year-round, must-visit destination – one that people all over the world would talk about.

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

BACKGROUND



Stakeholders saw the mission outlined in *Rethink* as a call to action for the local industry. Recurring themes were about offering unique and inspiring visitor experiences that would translate into higher levels of visitation and generate more word-of-mouth promotion.

The Mission: Vancouver’s visitor industry will work together to offer compelling reasons for travellers to visit, and will deliver unsurpassed experiences that motivate them to return and to become enthusiastic promoters of Vancouver.

Throughout the stakeholder discussions, it was clear that community support for the tourism industry and a continuation of ‘Olympic Spirit’-type delivery of quality visitor experiences was essential. The values statement is about building the tourism industry as a force for the preservation and extension of Vancouver’s unique qualities of life.

Shared Values: Vancouver’s visitor industry will seek to increase tourism in a way that further builds on 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.

This Tourism Master Plan is intended to close the gap between the demand side of the equation (Tourism Vancouver) and the supply side (policy makers at the City, Province and Federal Government). The TMP is also intended to provide a consensus between the stakeholders who participate in decision-making on tourism-related development for the City and advising investors and businesses on where they should be putting their energies as Vancouver’s tourism industry realizes this mission and vision.

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SITUATIONAL ANALYSIS

The Vancouver tourism industry is an integral part of the Vancouver economy. The city is highly regarded as one of the world's best places to live in terms of its environment, cultural diversity and quality of life, which makes it attractive to visitors. Vancouver has tremendous strengths in terms of its infrastructure and natural assets that support tourism, including one of the world's most highly regarded airports, the Canada Line, the Vancouver Convention Centre, and the newly renovated BC Place Stadium, which is an outstanding indoor sports and events venue. The 2010 Olympic Winter Games showcased Vancouver to the world.

Over the past 10 years, Vancouver has seen increasing traffic at its international airport, and despite increases in aviation charges, changes to border policies and a stronger Canadian dollar, overnight visits to Vancouver are higher today than 10 years ago.

From an organizational and funding perspective, Tourism Vancouver has experienced fluctuations in funding over the last several years. Its main source of revenues is derived from the 2% additional hotel room tax that is enabled by the Province of BC. After peaking in 2009, Tourism Vancouver's level of staffing has declined which is reflective of revenues. Even so, Tourism Vancouver has been able to increase its level of sales and marketing investment in the past several years, and has been able to achieve industry-leading results relative to its peers.

On the product side, renovations and improvements to long-standing attractions such as Science World, the Vancouver Aquarium, VanDusen Botanical Garden, Capilano Suspension Bridge Park and Grouse Mountain along with the opening of the new Fly Over Canada attraction, are positive signs. In addition, significant increases in the development of restaurant

and retail space in the downtown core are currently underway.

While Vancouver has seen the development of several luxury hotels in recent years, the total supply of hotel rooms is slightly less today than a decade ago and is unlikely to see substantial growth in the next 10 years. The relationship between current annual occupancy levels, average daily rates that operators are able to charge and current city land values combine to create a climate unfavourable to further hotel development, and puts increasing pressure on the conversion of existing hotel properties into other asset classes.

As such, Vancouver must focus on improving occupancy and increasing yield with the supply that it has in order to grow throughout the year. This will require a concentrated effort to develop new products and events in the first and fourth quarters, leveraging the cultural diversity and unique characteristics of the city's neighbourhoods as tourism products, and improving visitor transportation and connectivity between these products, events and neighbourhoods in order to lengthen visitor stays and increase the rate of repeat visitation.

SITUATIONAL ANALYSIS

Costs and barriers related to travel to Canada are unlikely to change in the near future. Therefore, from a market development perspective, Vancouver must position itself and compete in the U.S. and abroad as a higher-end travel destination for independent travellers and a premium meetings and conventions destination.

Accomplishing this will require continued and strengthened cooperation between key stakeholders such as Tourism Vancouver, the City of Vancouver, and the Vancouver Economic Commission. At the same time, these stakeholders must work together as

advocates for changes to provincial and federal policies on issues such as aviation charges and liquor regulations in order to ensure Vancouver's tourism industry is able to compete and grow as a leading world tourism destination.



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SITUATIONAL ANALYSIS

Key Assets

- In terms of branding and image, the 2010 Olympic Winter Games showcased Vancouver to the world, and Vancouver continues to be rated as one of the world's best places to work, live and visit according to numerous media and indexes.
- Vancouver has a diverse population with many different cultural communities that provide visitors with unique cultural experiences and have strong global connections.
- Passenger traffic at Vancouver International Airport (YVR) has been generally increasing over the past 10 years. On April 10, 2013, YVR was named Best Airport in North America at the Skytrax World Airport Awards in Geneva, Switzerland.
- The Canada Line connecting YVR with downtown was anticipated to see 100,000 boardings per day in 2013 when it was built, but it has consistently exceeded early targets and daily ridership now exceeds 120,000.
- The Vancouver Convention Centre (VCC) is one of Canada's largest convention centres. The west building expansion is certified LEED (Leadership in Energy and Environmental Design) Platinum. In 2002, and again in 2008, the VCC was awarded the International Association of Congress Centres (AIPC) 'Apex Award' for the 'World's Best Congress Centre'.
- BC Place reopened on September 30, 2011 as the world's largest cable-supported retractable roof stadium. BC Place has been described as one of the most beautiful stadiums in all of North America, and is busy, hosting more than 200 event-days per year, including British Columbia's largest trade and consumer shows, concerts, community events and motorsports.
- Vancouver's parks, beaches and the seawall are highly regarded, with Stanley Park ranked by Trip Advisor as the city's #1 attraction, and recently named the second best city park in the world by *Travel + Leisure Magazine*. Vancouver has also been named one of the world's 'Top 10 Beach Cities' by *National Geographic*.
- Also on the product side, improvements and renovations to long-standing attractions such as Science World, the Vancouver Aquarium, VanDusen Botanical Garden, Capilano Suspension Bridge Park, Grouse Mountain and the opening of the new Fly Over Canada attraction demonstrate renewed investment in Vancouver's tourism product. Furthermore, a new hotel to be operated by the five-star Trump Hotel Collection is under construction at 1133 West Georgia Street.
- Vancouver is on its way to become the greenest city in the world by creating and implementing the Greenest City 2020 Action Plan – a strategy for staying on the leading edge of urban sustainability.

SITUATIONAL ANALYSIS

Potential Constraints

- Canada's aviation policies continue to make Canada an expensive destination. Aviation charges have contributed to Canada's ranking of 106th among competing nations for Travel & Tourism Price Competitiveness by the World Economic Forum, and since leisure travel is particularly price-inelastic, this ranking has a major negative impact on potential travel to Canada and Vancouver.
- Canada's bilateral aviation agreements continue to limit access to Vancouver International Airport. In particular, Canada does not have an Open Skies agreement with any Asian country, and virtually all of the Canada's bilateral agreements with Asian countries are restrictive, limiting which airlines should be allowed to serve particular cities, how many flights should be allowed and how airfares should be regulated.
- Canadian border control, security and visa policies have set unnecessary barriers to industry growth from some markets.
- Vancouver's cruise business has lost ground to Seattle, but is forecasted to recover some traffic in 2013 and 2014. A looming 2015 regulation requiring cruise ships on the North American coast to use more expensive, but cleaner, low-sulfur fuel on cruise passenger ships could increase cruise prices and impact cruise demand.
- Funding for the Canadian Tourism Commission continues to lag behind funding for other countries, reducing international promotion of Canada as a tourism destination.
- The total supply of hotel rooms in Vancouver is virtually the same as 10 years ago, as new luxury properties that have come online have replaced more economical hotel properties that have been converted to other uses. Vancouver is unlikely to see substantial growth in hotel rooms in the near future as current city land values make the development of other asset classes more attractive.
- Vancouver requires incremental, long-term, sustainable and legislated funding in order to compete with the likes of Montreal and Toronto, which both have annual budgets of approximately \$30 million. Tourism Vancouver's gross budget is less than half of that allocated in these cities. Tourism Vancouver and the Hotel Association of Vancouver need to continue to work closely with the Province of BC to determine options for addressing this funding situation.

Key Opportunities

Looking at the demand side (visitors and new markets) and the supply side (new products and services) of the tourism equation in Vancouver, there are a number of key opportunities to grow the industry.

On the demand side, a number of recent tourism trends and developments play to Vancouver's strengths:

- **Global Tourism Defies Numerous Crises**
People around the world still want to travel despite the global financial and economic crisis. Looking ahead, the World Tourism Organization (UNWTO) is predicting a 2-3% rise in international arrivals annually. This moderate but solid growth demonstrates that world tourism is remarkably stable despite slow global economic growth.
- **U.S. Recovery** As the U.S. economy improves and outbound U.S. international travel increases, Vancouver has the potential to regain lost U.S. market share. Some economic analysts are also forecasting that the Canadian dollar will decline to as low as 90 cents in 2014, with long-term depreciation of the currency towards its equilibrium value of between 80 to 90 U.S. cents, which would make Canada more attractive to U.S. travellers and keep more Canadian travellers at home.
- **The Growth of Emerging Markets**
A nascent middle class in emerging markets such as Brazil, Mexico, China and India has burst onto the tourism scene and is casting around for the ideal locations in which to spend its tourism dollars. China now accounts for the largest number of outbound travellers in the world and Vancouver can capitalize on the direct air service to several Chinese cities currently in place.

- **Travel Heads for New Horizons**

Adventure, cultural and creative tourism are growing fast as people seek diverse new experiences. These forms of tourism help protect local communities and the environment as they tend to grow in a responsible and sustainable manner.

- **Safety and Security** Affluent U.S.

travellers rate safety and security as increasingly important in the selection of their international travel destinations.

On the supply side, several major recent announcements and plans under review hold great promise for Vancouver's future visitors:

- **The TED Conference** With the advent of the TED (Technology, Entertainment, Design) Conference, Vancouver is carving out a place as an intellectual capital and has an opportunity to engage locals and attract future visitors to a unique event schedule inspired by TED's creativity and intellectual cachet.
- **Aboriginal Culture Pavilion** Aboriginal Tourism BC has developed plans to create a new aboriginal tourism centre and attraction in Stanley Park on the site of the current Klahowya Village. This plan is a significant cultural tourism opportunity as 1 in 4 visitors to BC have expressed an interest in aboriginal cultural tourism experiences.

Key Opportunities Cont'd

- **The Vancouver Art Gallery** The proposed new Vancouver Art Gallery (VAG) is an opportunity to create an important piece of tourism infrastructure that is also a major indoor attraction and a year-round cultural, community and gathering space that can serve residents, artists and cultural tourists. Its new building and location will make it an important cultural destination offering the cultural tourist one more, very compelling reason to visit Vancouver, and enriching and expanding the conversation about the city beyond its geographical credentials.
- **Entertainment District and Tourism Corridor** With the potential removal of the viaducts and impending development of Northeast False Creek, Vancouver has the opportunity to create a major new tourism destination and entertainment district offering a central public meeting place with major restaurants and bars, speciality retail shops and exciting nightlife with music, dancing and live entertainment. With this opportunity, Georgia Street could become a 'Tourism Corridor' connecting the entertainment district to downtown hotels and important attractions such as a new VAG, Queen Elizabeth Theatre and Stanley Park.
- **Granville Island** Granville Island is one of Canada's most visited places and attracts 2 million tourist visits a year. The recent announcement of Emily Carr University's move to a new Great Northern Way campus has sparked discussion about the future of one of Vancouver's most important visitor destinations. The proposal to reallocate two underused lanes on the Granville Bridge to create an elevated cycling and pedestrian path in the centre of the bridge – with potential for elevator connections to Granville Island – represents significant opportunities to enhance and improve one of Vancouver's most important attractions.
- **Resident Enthusiasm and Diverse Neighbourhoods** Vancouver residents are willing hosts who love to share their city and neighbourhoods. Vancouver has many diverse and culturally rich neighbourhoods that currently host a small number of tourists, but could absorb additional visitors with energy and enthusiasm.

GOALS

In order to grow and develop its tourism industry, Vancouver should enhance the visitor experience by developing new products, events and services, leveraging the cultural diversity and unique characteristics of its neighbourhoods as tourism products, and improving visitor transportation and connectivity between these products, events and neighbourhoods. A particular focus should be placed on developing new products and events in the first and fourth quarters to improve hotel occupancy throughout the year. With aviation charges, border policies and hotel supply unlikely to change in the near future, Vancouver should focus on yield and position itself as a premium travel destination while improving and enhancing the sustainability of its travel and tourism industry.



Experience – Visitor

Vancouver will create, enhance and deliver tourism products and services, activities and events that create a compelling, must visit destination experience that reflects the unique culture and diversity of Vancouver.



Experience – Resident

Vancouver will foster a positive social, cultural and economic relationship between the tourism industry, visitors and local residents that turns Vancouverites into engaged and committed hosts.



Environment

Vancouver's tourism industry will embrace the vision of the Greenest City 2020 Action Plan, green its operations, and work with the City of Vancouver to develop and promote Vancouver as a world-leading sustainable community and tourism destination.



Economics – Seasonality

Vancouver will focus creation, enhancement and delivery of tourism products and services, activities and events in low traffic months to help reduce and optimize the seasonality of visitation.



Economics – Investment

Vancouver will foster expansion of private sector investment in tourism projects and services and the coordination of public infrastructure investment to achieve optimum benefits for the tourism industry and residents.



Economics – Growth

Vancouver's tourism industry will deliver 'peer-group leading growth'* that is consistent with optimized carrying capacity, reduced seasonality, and high value products, activities, services and events.

*'Peer-group leading growth' is defined by a top-of-the-list ranking among Vancouver's competitive group.



Employees – Employment

Vancouver's tourism businesses will become employers of choice for residents seeking long-term careers, offering exceptional opportunities for growth in the competitive tourism industry.



Employees – Education

Vancouver's secondary and post-secondary institutions will offer world-renowned tourism education to attract and develop future tourism employees and leaders.

RECOMMENDATIONS



RECOMMENDATIONS

In order to meet the Tourism Master Plan’s experiential, environmental, economic and employment goals, key issues need to be addressed and new opportunities for growth identified and implemented. Doing so will require building on the strength of the current relationship between the City of Vancouver, Tourism Vancouver and the Vancouver Economic Commission, and enhancing collaboration and cooperation with key industry stakeholders.

The following recommendations were developed based on input and ideas received from more than 180 stakeholders in one-on-one interviews and feedback received from more than 2,000 Vancouverites via an online survey. Their ideas and suggestions have been evaluated in light of the constraints, trends and developments identified in the situational analysis and grouped into eight key areas of focus:

- 1. Product Development** While Vancouver’s natural beauty and assets are exceptional, growing global tourism competition necessitates that Vancouver enhance support of existing attractions and events and expand its product offering.
- 2. Events** Whether they be centred around culture, business or sports, events play an increasingly important role in stimulating tourism demand. Vancouver has demonstrated its ability to host and produce world events such as the 2010 Olympic Winter Games. It needs to leverage this experience and the infrastructure it enjoys to both enhance existing events and create or attract new ones, particularly those suitable to the first and fourth quarters of the year.
- 3. Visitor Experience Design** Additional research is required to better understand and create profiles of typical Vancouver visitors in order to understand where improvements are required from a transportation and wayfinding perspective. At the same time, there is an opportunity for Vancouver to develop a world leading digital visitor experience via the implementation of free Wi-Fi and creation of new mobile wayfinding, augmented reality and activity booking applications.
- 4. Neighbourhoods** Vancouver is one of North America’s most culturally diverse and liveable cities. Many of its neighbourhoods can be developed and promoted as tourism destinations in order to lengthen visitors’ stays, increase repeat visitation and distribute more of the economic benefits generated by tourism outside the downtown core.
- 5. Tourism Infrastructure Development** Core facilities, such as convention centres and stadiums, and the clustering of tourism products and services within high traffic areas of the destination are key factors in tourism success, and Vancouver offers an exceptional convention centre and stadium already. Important destinations such as Granville Island need long-term planning that takes into account the visitor perspective, and new core tourism areas need to be identified and developed. This will ensure the long-term growth of the industry while also meeting the needs and interests of the local community.

RECOMMENDATIONS

6. Transportation An efficient and effective visitor transportation network is a key enabler for the tourism industry. While elements of Vancouver’s public transportation system, such as the Canada Line, serve visitors very well, the lack of late night public transportation negatively impacts both tourism industry employees and visitors alike.

7. Advocacy and Public Affairs There are several federal and provincial policies and regulations that negatively impact the tourism industry as identified in the situational analysis. While Tourism Vancouver and the City have no authority over these areas, they can work together with other key industry stakeholders to lobby for change.

8. Partnerships and Alliances The management of Vancouver as a tourism destination is the joint responsibility of the City of Vancouver and Tourism Vancouver, along with key stakeholders such as the Vancouver Economic Commission. This Tourism Master Plan is an important first step and builds upon the excellent relationship already established between these partners, while identifying specific roles and responsibilities for each.



ONE

PRODUCT DEVELOPMENT

Initiate a product development strategy to support existing attractions and create original new tourism concepts and experiences.

RECOMMENDATIONS

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1. Product Development

By creating a product development strategy the Partners can support existing attractions and create original, new tourism concepts and experiences, building distinctive and sustainable tourism products, services, attractions and infrastructure that help shape a compelling, must-visit destination. Particular focus should be paid to indoor attractions and cultural facilities that provide year-round activities in order to address seasonality caused by rainy weather. Stronger partnerships with relevant stakeholders and investors should also be cultivated to strengthen Vancouver's desired position as a world city.

• Aboriginal Tourism



Vancouver can showcase its First Nations history and heritage by sharing, developing or incorporating authentic Aboriginal cultural elements into the visitor experience.

• Aquatic Tourism



More harbour, river and ocean touring activities can be developed that connect visitors with the waterside and seascape.

• Creative Tourism



Vancouver can leverage its TED conference host city status and the reputation of the city's leading creative institutions, such as Emily Carr University, Vancouver Film School and the Centre for Digital Media to develop and promote new creative programs and classes targeted towards domestic and international visitors.

• Culinary Tourism



Vancouver can leverage and enhance its reputation as a Top 10 destination in North America for foodies through support of current food and beverage establishments, expanded street food offerings, farmers markets and events that spotlight culinary diversity – and by doing so, focus attention on local food production, breweries and wineries.

• Cultural Tourism



The City of Vancouver can continue to support, invest in and develop infrastructure, cultural facilities and activities that are focused on neighbourhood diversity and the needs and desires of both visitors and Vancouver residents (e.g. Vancouver Art Gallery, Downtown Eastside Culture Crawl and Bard on the Beach).

RECOMMENDATIONS



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A new purpose-built Vancouver Art Gallery that allows for greater exhibitions while providing an interesting space to visit (not necessary a starchitect building) would be a good addition to Vancouver's tourism offering.

» VANCOUVER TOURISM MASTER PLAN SURVEY PARTICIPANT

1. Product Development Cont'd

• **Cycling**

The City of Vancouver can continue to support cycling for all ages and abilities and expand (and Tourism Vancouver should promote) touring circuits that connect city neighbourhoods and adjoining municipalities, while supporting Vancouver cycling merchants who rent bicycles and equipment for these excursions.

• **Health and Wellness Tourism**

The tourism industry can support and create lifestyle events, activities and business opportunities focused around health, fitness and living well, such as the Vancouver Marathon, Gluten Free Expo, GranFondo and SeaWheeze.

• **LGBT Tourism**

Vancouver can intensify its efforts to create and host Lesbian, Gay, Bisexual and Transgender (LGBT) products and visitors, including infrastructure and aesthetic enhancements to Davie Village and the West End; and supporting events, attractions and businesses that cater to this lucrative market segment.

• **Parks and Nature**

The Vancouver Park Board and the tourism industry can create, develop and promote more products, activities and events such as bird watching and soft adventure activities that emphasize engaging with the region's parks, gardens, nature and wildlife in a responsible, sustainable manner. The Vancouver Park Board should also develop enhanced branding and merchandizing for parks such VanDusen Botanical Garden and Stanley Park to strengthen their identities as key tourism destinations and attractions.

• **Seawall and Beaches**

The City can continue working with the Park Board, private developers and other partners to deliver improvements by identifying existing and future issues of capacity, quality, comfort, accessibility and conflict on the seawall and beaches. The Park Board should explore additional opportunities to animate the seawall and its beaches with entertainment, artistic exhibitions and performances, food and beverage establishments and other activities that allow residents and visitors to more fully engage in an urban outdoor experience.

RECOMMENDATIONS



1. Product Development Cont'd

- **Shopping**



The City and the Vancouver Economic Commission can continue to support the development of local retail establishments, products and services, and Tourism Vancouver should enhance the promotion of shopping, associated activities and the variety of international, national, and local brands available in its marketing and communications.



- **Vancouverism**



Tourism Vancouver can continue to leverage the city's growing reputation for urban design, planning, sustainability, integration of land use, transportation and energy to attract not only designers, planners and engineers from around the world, but also leisure travellers interested in urban living, architecture and design.

TWO

EVENTS

Establish a dedicated events organization to lead, organize and manage citywide efforts in delivering year-round events – with emphasis on the first and fourth quarter.

RECOMMENDATIONS



2. Events

Having a dedicated events organization or initiative could help to lead, organize and manage citywide efforts to create, develop, facilitate, fund and incubate a wide range of important events that deliver year round economic contribution with strong emphasis on first and fourth quarters traffic.



- **Cultural Events**

The tourism industry can support, enhance and leverage the events, festivals and holidays of major cultural groups and organizations such as the Pride Parade, Vaisakhi Parade and Chinatown’s Spring Festival Parade.

- **Signature Events**

Vancouver can support and foster current city events and encourage and facilitate the development of a world-renowned indoor signature event.

- **Sports Tourism**

Tourism Vancouver can join with PavCo (VCC and BC Place), the Vancouver Sport Network and other partners in moving a sport strategy forward – and restore its sports tourism marketing efforts to bid for and deliver sport conferences and premier events such as the Davis Cup and FIFA Women’s World Cup to the city.



Find the signature event that best positions Vancouver and then build opportunities around that event 365 days per year – and then you’ll take a signature event and turn it into a sustainable tourism opportunity.

» VANCOUVER TOURISM MASTER PLAN SURVEY PARTICIPANT

THREE

VISITOR EXPERIENCE DESIGN

Undertake a comprehensive assessment of the visitor experience to identify ways to improve Vancouver as a place to visit.

RECOMMENDATIONS

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Creating a world-class digital visitor experience is a ‘no contest’ question. We can lead with other leading cities or we can kick ourselves for lacking the vision...

» VANCOUVER TOURISM MASTER PLAN SURVEY PARTICIPANT

3. Visitor Experience Design

A comprehensive assessment of the visitors experience could be undertaken to identify opportunities for enriching and enhancing all that is delivered by Vancouver’s tourism industry.

• Customer Journey Mapping

Profiles of all visitor types could be created, including descriptions of their in-town journeys and how they enjoy their chosen attractions and neighbourhoods in order to create effective product development and visitor transportation strategies.

• Digital Visitor Experience

With the proliferation of smart phones, Wi-Fi access is becoming increasingly valued by travellers and a growing number of destinations now offer free Wi-Fi throughout high-traffic areas. Free Wi-Fi throughout downtown would enable visitors to share and promote their Vancouver experiences via social networks. Accessible Wi-Fi corridors are also integral to enabling visitors to access and use new wayfinding, augmented reality and activity booking applications currently being developed by Vancouver’s leading digital businesses.

• Hosting and Hospitality

Vancouver can recognize and promote tourism’s contribution to the city’s economic and cultural identity through events and programs such as volunteer recognition, the ‘Vancouver Tourism Awards’, ‘Be a Tourist in Your Own Town’ and celebration of the United Nations’ ‘World Tourism Day.’

• Sustainability

Vancouver hotels and other tourism stakeholders can be encouraged to work to green their operations and pursue global environmental standards and certification programs.

• Wayfinding

Visitor wayfinding requirements can be identified, compiled and communicated to organizations and agencies tasked with improving general citywide and transportation-specific systems. Wayfinding efforts should include signage and mobile applications.

FOUR

NEIGHBOURHOODS

Create a neighbourhood marketing council with Business Improvement Areas (BIAs) to promote Vancouver's cultural diversity.

RECOMMENDATIONS

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Tourists today are looking for unique touchstone connections with locals. Bard, Arts Club, Granville Island, Kits Beach, 4th Avenue, Commercial Drive are all organic, unique and very Vancouver. Funding street parties or events like Kits days and the tourists will naturally make their way there.

» VANCOUVER TOURISM MASTER PLAN SURVEY PARTICIPANT

4. Neighbourhoods

Tourism Vancouver, the City of Vancouver and the BIAs can promote the cultural diversity, shopping and dining in Vancouver's neighbourhoods. Support, investment in, and development of a range of neighbourhood-centred tourism products and services that animate neighbourhoods, engage diverse communities and focus on the needs and desires of both residents and visitors could enliven neighbourhoods, provide new tourists offerings and relieve pressure on existing tourist attractions.

• Neighbourhood Focus

The following BIAs and neighbourhoods could be considered for their tourism development potential and be provided assistance from Tourism Vancouver and the City to further develop their tourism potential.

- Cambie Village
- Chinatown
- Commercial Drive
- Downtown Vancouver
- Gastown
- Granville Island (neighbourhood)
- Kitsilano 4th Avenue
- Mount Pleasant
- South Granville
- UBC (neighbourhood)
- Village at False Creek (neighbourhood)
- West Broadway
- West End
- Yaletown

• Public Art

A public art loop could be created that ties together existing and new public art installations into a neighbourhood-oriented art circuit for both visitors and locals.

FIVE

TOURISM INFRASTRUCTURE DEVELOPMENT

The partners should articulate, plan and champion significant, responsible development opportunities for new tourism infrastructure.

RECOMMENDATIONS

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Granville Island is already a tremendous success. The City of Vancouver and TransLink can further support it by improving transportation options, specifically with the downtown streetcar and major improvements for cycling.

» VANCOUVER TOURISM MASTER PLAN SURVEY PARTICIPANT

5. Tourism Infrastructure Development

Vancouver can actively seek out and help define, articulate, plan and champion significant development opportunities for new tourism infrastructure that provides the foundation to create, grow and enhance the long-term potential for new tourism products and services.

• BC Place

The newly renovated BC Place Stadium, BC's largest indoor venue, should be leveraged to host additional unique and compelling indoor cultural events, festivals and conferences.

• Cruise Business Strategy

Port Metro Vancouver should develop a cruise business strategy that evaluates the condition of existing cruise ship terminal facilities in Vancouver and need for additional facilities.

• Granville Island

With Emily Carr University relocating, the City of Vancouver, Tourism Vancouver and Vancouver Economic Commission can assist Canada Mortgage and Housing Corporation in attracting investment and in planning for the renewal and refreshment of the island for future generations of residents and visitors.

• NE False Creek Sports and Entertainment District

With the impending development of Northeast False Creek, Vancouver can create a major new tourism destination and entertainment district. The district would be adjacent to BC Place and Rogers Arena, and could offer a central public meeting place with major restaurants and bars, speciality retail shops, and exciting nightlife with music, dancing and live entertainment.

• Pacific National Exhibition

Vancouver should implement the PNE Hastings Park Master Plan to provide a modernized venue for major new events and festivals.

RECOMMENDATIONS



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5. Tourism Infrastructure Development Cont'd

• Portside

The City, Port Metro Vancouver, and Tourism Vancouver should ensure that the tourism industry is consulted and considered in any future development of the Port Metro lands east of Canada Place in order to ensure that it serves the needs and interests of industry, residents and visitors.

• Tourism Corridor

The potential removal of the viaducts offers a significant opportunity to create a new 'Tourism Corridor' on Georgia Street between a new sports and entertainment district in NE False Creek at one end and Stanley Park at the other. Through transportation, pageantry and wayfinding, the Tourism Corridor would connect these destinations to downtown hotels and important attractions such as a new Vancouver Art Gallery (VAG) and the Queen Elizabeth Theatre, and could feature a new 'cultural tourism hub' at its centre located in the historic provincial courthouse following the relocation of the VAG.

• Vancouver Convention Centre

Tourism Vancouver and VCC should continue to work with the Vancouver Economic Commission to identify leaders within key sectors of the Vancouver economy who can champion and promote meetings and conventions in Vancouver among related associations and organizations.

SIX

TRANSPORTATION

Incorporate the needs of visitors into Vancouver's public and private transportation system.

RECOMMENDATIONS



All great tourist destinations have great public transportation.

» VANCOUVER TOURISM MASTER PLAN SURVEY PARTICIPANT

6. Transportation

A Visitor Transportation Assessment should be conducted to identify the strengths and weaknesses of Vancouver’s transportation system in relation to the transportation needs of visitors.

- **Accessibility**

Tourism Vancouver should continue to work with the Province of British Columbia, LIFT Philanthropy Partners, Rick Hansen Foundation, Destination BC and others to make Vancouver a premier travel destination for people with disabilities (physical, hearing, sight, etc).

- **Centre City Transit Loop**

The City and Tourism Vancouver could develop a transportation strategy to improve public transportation between Canada Place and destinations such as Gastown, Chinatown, the proposed new entertainment district, the Village at False Creek and Granville Island in order to connect key tourism destinations and neighbourhoods outside the downtown core together into a new unified tourism circuit.

- **False Creek Ferries**

Accessibility of the False Creek Ferries is a challenge. The city can work on changes to the docks and the ferry service on False Creek to improve accessibility for all ages and abilities.

- **Late Night Public Transportation**

TransLink and other transportation providers should provide service for late night passengers (employees, patrons and visitors).

- **Public Bike Share**

The City of Vancouver should approve and implement a public bike sharing program. As a component of the public transportation system that considers existing bike rental companies, it will improve and enhance Vancouver’s positioning as a sustainable tourism destination.

- **Rapid Transit**


Rapid Transit is integral to the development of neighbourhoods as tourism destinations. The potential addition of rapid transit in the Broadway Corridor would improve access to several neighbourhoods and to the attractions and facilities at UBC.


RECOMMENDATIONS

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6. Transportation Cont'd

- **Taxis** 

The City can work with Vancouver taxi companies and trade associations to explore the creation of a strategic plan for taxi operations to meet both short-term supply needs and the long-term visitor requirements of a world tourism destination.
- **Walkability** 

The City of Vancouver should continue to enhance and improve pedestrian corridors, safety and connections in the downtown core and continue to implement recommendations from the Pedestrian Safety Study and Action Plan to make walking feel safe, comfortable and enjoyable for everyone.



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SEVEN

ADVOCACY AND PUBLIC AFFAIRS

Align advocacy interests of the partners for the benefit of visitors and residents.

RECOMMENDATIONS



These are all major issues that need to be constantly monitored by the industry. Industry needs resources to ensure that its response to these complex issues comes from knowledge.

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7. Advocacy and Public Affairs

Tourism Vancouver, in cooperation with the Vancouver Tourism Coalition and the Lower Mainland Tourism Alliance, should clearly articulate and support the industry’s advocacy and public affairs positions, backed by rigorous economic impact research.

- **Alcoholic Beverages**

The rules and regulations with respect to the consumption of alcoholic beverages in British Columbia should be reviewed and aligned with those of other important tourism destinations. Current provincial policies and regulations with respect to taxation on the distribution and sale of alcoholic beverages also need to be reviewed and optimized in order to improve the economic competitiveness of British Columbia’s tourism.

- **Aviation Charges**

The tourism industry should continue to educate and inform government leaders about the economic importance of YVR and work to reduce fees and charges imposed on passengers.

- **Bilateral Air Services**

The tourism industry should advocate for open and transparent bilateral air negotiations that maximize the opportunity for growth of the tourism industry.

- **Tourism Vancouver Funding**

Vancouver tourism stakeholders should work with the Province of British Columbia to ensure that Tourism Vancouver is provided secure, incremental, long-term, sustainable funding to effectively market, program and develop Vancouver’s tourism economy.

- **Tourism Workforce Development**

Tourism Vancouver, in partnership with key stakeholders, including DestinationBC and go2, should continue to work together to promote careers in tourism, make BC Canada’s preferred employment destination for tourism professionals, and advocate for additional changes to federal immigration policies in order to address current and forecasted industry labour shortages.

EIGHT

PARTNERSHIPS AND ALLIANCES

Formalize an ongoing group of the partners to oversee Tourism Master Plan actions, with progress reports to industry and residents.

RECOMMENDATIONS

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There seems to be this idea that when something benefits 'tourism,' it doesn't benefit residents. The truth is that pretty much anything that benefits tourism benefits our local economy and directly puts money in the pockets of many of our residents.

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8. Partnerships and Alliances

Tourism Vancouver, the City of Vancouver, the Vancouver Economic Commission and other key public and private stakeholders would greatly benefit from the establishment and formulation of a new strategic committee called the Vancouver Tourism Partnership, whose mission is to create a unified vision and voice for Vancouver's tourism industry.

• Brand Alignment

The City of Vancouver, Tourism Vancouver and Vancouver Economic Commission should conduct a comparative brand audit and develop a unified brand strategy and positioning for the city that emphasizes cultural diversity, economic development, natural beauty and sustainability.

• Regional Tourism Master Plan

The Vancouver region should create a Regional Tourism Master Plan, including Vancouver, Metro Vancouver, the Fraser Valley, Whistler and Squamish.

• Regulations and Incentives

Tourism Vancouver and the City can work together to streamline regulations, reduce the costs of doing business in the city, attract provincial investment, and create incentives to encourage the upgrading and enhancement of tourism infrastructure, products, attractions and accommodations.

• Tourism Industry Promotion

City leaders, (e.g. the mayor and city councillors), along with provincial leaders, should lead the effort to communicate to residents the importance of Vancouver's tourism industry to the Vancouver economy and act as spokespeople for the development of the industry to potential investors, visitors and industry players outside of Vancouver.

A person wearing a white lab coat and white gloves is working on a vibrant, abstract mural. The mural features bold black outlines and a rich color palette of red, purple, blue, yellow, and green. The person is seen from the side, focused on their work. The background is a continuation of the colorful, abstract artwork.

IMPLEMENTATION

IMPLEMENTATION

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The Tourism Master Plan suggests several important changes to Vancouver’s tourism policy-making, planning and programming framework, including the recommendation the Partners undertake several specific tourism management roles and responsibilities:

- Creating a tourism product development strategy;
- Leading the creation of a sports and events organization;
- Moving a sport strategy forward;
- Developing visitor activity and experience mapping to inform a visitor transportation plan and visitor experience design;
- Assisting Canada Mortgage and Housing Corporation (CMHC) in planning and investment promotion for the renewal and refreshment of Granville Island;
- Consulting with Port Metro on the future of ‘Portside’;
- Consulting on the future of the NE False Creek entertainment district and tourism corridor;
- Coordinate the production of a visitor transportation plan;
- Consulting with Translink on local and late night bus service;
- Streamlining regulations, reducing the costs for tourism businesses, attracting investment and creating incentives for tourism business growth;
- Promoting HR credentials, industry involvement in education and training, and increased professionalism in Vancouver;
- Conducting a brand audit to unify the Vancouver brand and positioning; and
- Encouraging the other metro cities to participate in a Regional Master Plan.

IMPLEMENTATION

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The Tourism Master Plan also proposes:

- The creation of the Vancouver Tourism Partnership (VTP). This is the continuation and formalization of the Steering Committee that was formed to manage and direct this Tourism Master Plan project. The Steering Committee includes Tourism Vancouver, the City of Vancouver and Vancouver Economic Commission. The VTP will include other key public and private organizations, and will have as its mission the creation of a unified vision and voice for Vancouver's tourism industry.
- The members of the VTP should ensure that resources are dedicated to the partnership to ensure alignment and co-ordination at the operational level so that resources are maximized and each of the partners are committed to a specific role in advancing the goals of the Tourism Master Plan.
- Based on the recommendations proposed by Resonance Consultancy and the Scale and Scoping Analysis ranking of recommendations, the VTP should evaluate and prioritize the recommendations and develop an action plan and timeline for implementation. Some of these actions will flow directly from an individual recommendation, while other will address a group or series of recommendations. Regular updates on progress in the implementation of the actions should be shared with the tourism industry and Vancouver residents.

The Tourism Master Plan also proposes the creation of the Neighbourhood Marketing Council. The Neighbourhood Marketing Council is a new organization, the concept for which arose from a convergence of stakeholder needs and interest. The need is to create and help market additional tourism products and services within Vancouver neighbourhoods to help drive visitor traffic and spending beyond the downtown core. The interest was expressed by the BIAs and neighbourhood representatives who are seeking tools and advice to develop and promote their opportunities. Tourism Vancouver will initiate this committee with participation from the neighbourhood BIAs, arts and culture representatives and the City.

Although the Tourism Master Plan proposes that an organization be established to lead, organize and manage citywide efforts to create, develop, facilitate, fund and incubate a wide range of important events, it also acknowledges that this organization still requires definition, structure and funding, and thus proposes that Tourism Vancouver undertake the second phase of the events strategy to build a robust business model for the organization before formally embarking on its creation.