



Destination Vancouver

*Destination Update &
2022 Business Sprint*

January 25, 2022



Welcome



Host

Lucas Pavan

Destination Vancouver Team Member

Manager, Membership & Dine Out Vancouver Festival



To transform communities and visitors through the power of travel

DESTINATION VANCOUVER TEAM MEMBERS



Royce Chwin
President & CEO



Sandra Sharples
Director, People
& Culture



Ted Lee
CFO & VP,
Destination
Stewardship



Dave Gazley
VP, Meetings &
Conventions



Karen Soyka
VP, Strategy &
Business
Development

Welcome

TEAM VAN
COU
VER

2022 BUSINESS SPRINT

January 25, 2022

DESTINATION
VANCOUVER

AGENDA

- Trends / Disrupters
- Rebuild vs Recovery
- Outlook for Vancouver
- 2022 Business Sprint & Priorities
- Resources for Partners



A modern office interior with large windows overlooking a harbor and mountains. Two women in business attire are sitting on a dark green sofa, looking at a laptop. The office has a wooden ceiling and a staircase in the background. The view outside shows a harbor with a large ferry, mountains, and a city skyline.

MISSION

To responsibly rebuild a sustainable visitor economy to \$13B by 2026

SHIFTING PRIORITIES

	2019	2020-2021 New Realities	2022 Added Complexity
Leisure Travel	International growth	Inspiring locals	Markets that can travel
M&C Travel	New Business	Rebook business	Hybrid meetings
Product	Supply vs Demand	Advocate for businesses	Demand vs Supply
Service	Personalization	Health and safety rank #1	Traveller expectations
Labour	Shortages	Manage workforce	Rebuild workforce
DMO	Promotion	Relevancy agenda	+ Management
Customer	Visitors	Sentiment vs confidence	Residents & Communities
Climate action	Growing awareness	Global concern	Responsible action
Funding	Increasing	Grants & Subsidies	Dependent on destination

TRENDS

MACRO TRENDS

COVID-19
Uncertainty

Labour & Skills
Shortage

Economic
Change

Social
Change

Climate
Change

Accelerated
Digitalization



INDUSTRY TRENDS

DMO Role
Changes

Increased
Costs

Supply Chain
Disruption

Changes in
Access

Reduced
Business Travel
& Events

Travel
Friction

MARKET TRENDS

Increased
Flexibility

Responsible
Travel

Reconciliation

Health &
Wellbeing

Desire for
Outdoors

Remote
Work

REBUILD VS RECOVERY

Where will lost meeting business come from?

Will sustainability really matter to future travellers?

Who are the right travellers for Vancouver?

How can tourism become a community-shared value?

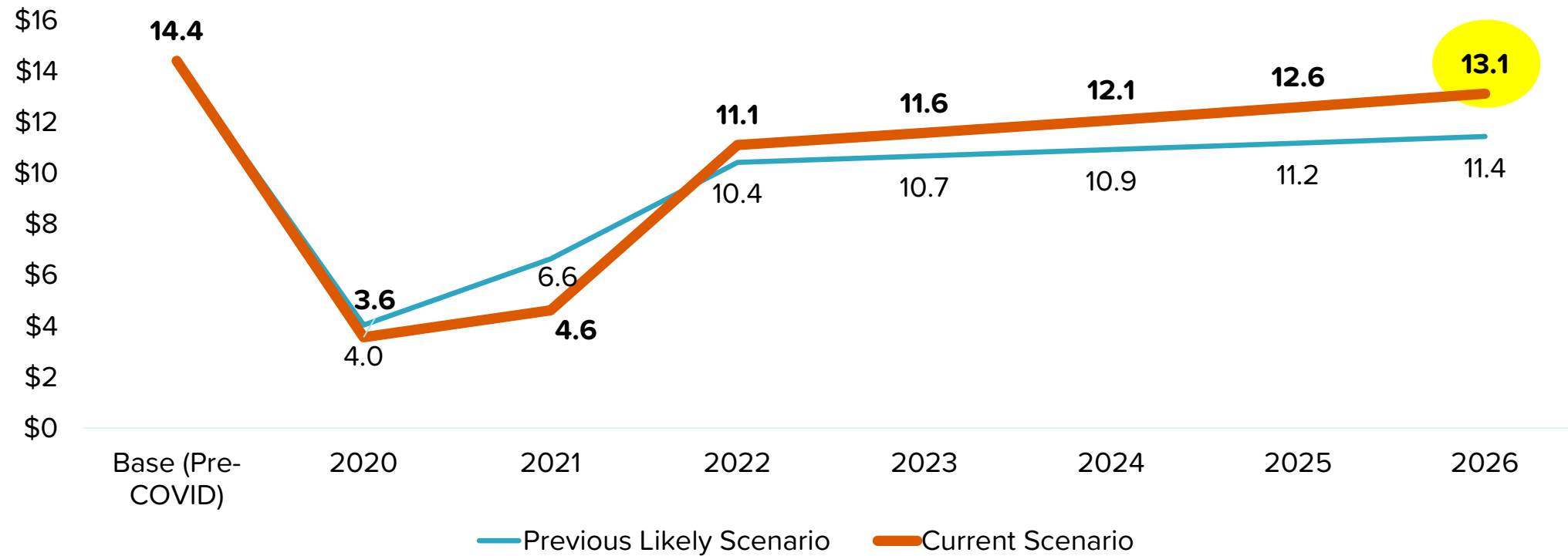
What are our digital possibilities?

How do we raise the profile of tourism as a career vs a job?



PROJECTED TOURISM REVENUES

\$13 billion by 2026

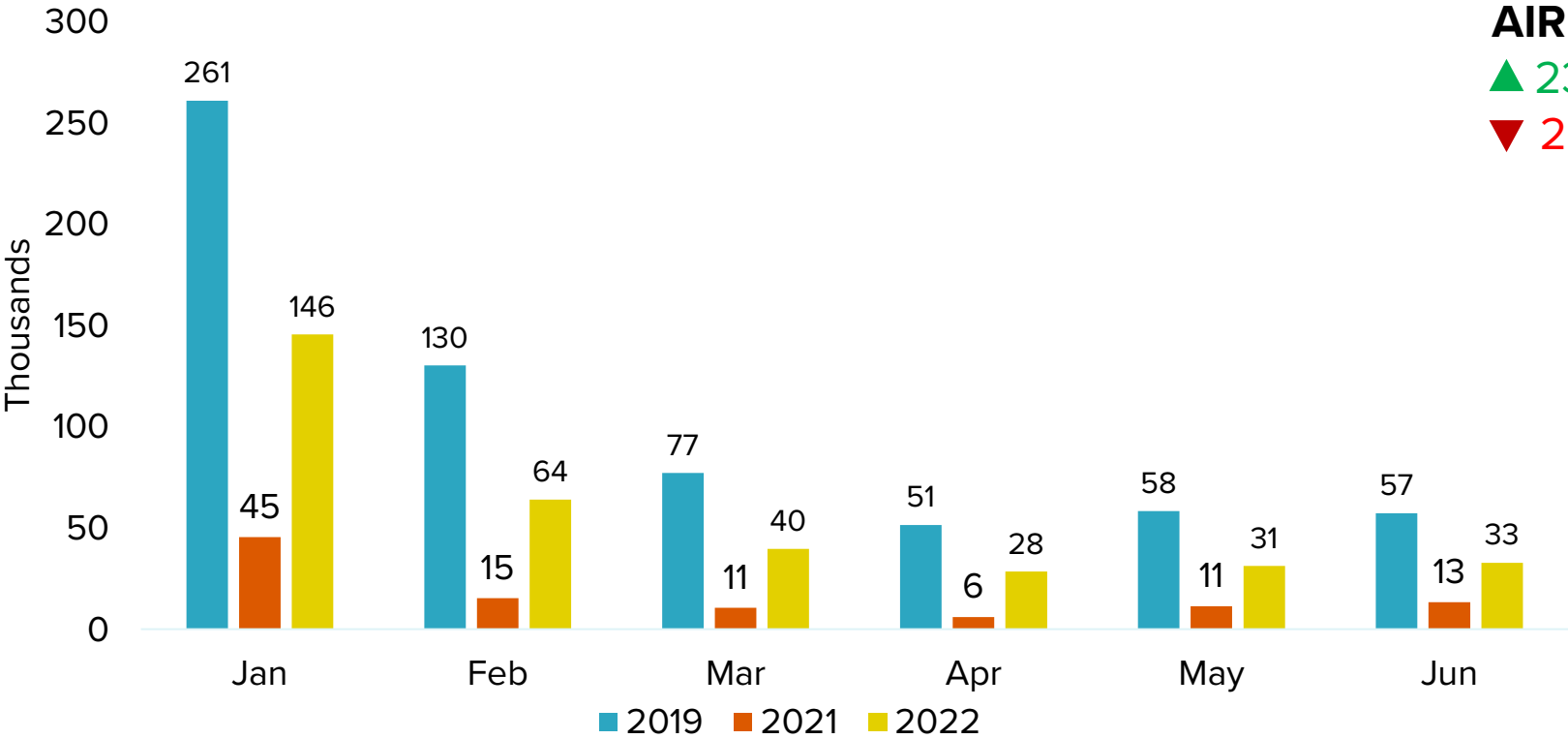


A scenic landscape at sunset. In the foreground, a grassy hillside is bathed in golden light. A paved path leads from the bottom left towards the center, where a person in a red shirt is running away from the viewer. To the left of the path, there are several large, leafy trees. In the middle ground, a small, modern building with a glass facade and a dark roof stands on the path. Beyond the path, a calm body of water stretches to the horizon. The sky is a deep orange, and the sun is visible as a bright, glowing orb behind the trees on the left. The overall mood is peaceful and serene.

2022 OUTLOOK

Forward-Looking Air Arrivals for 2022 (Jan-Jun)

As of January 9, 2022



AIR ARRIVALS ON THE BOOKS: 342,000

▲ 239,000 arrivals over 2021 (+235%)

▼ 294,000 arrivals over 2019 (-46%)

SHARE OF ARRIVALS

- Canada - 44%
- United States - 25%
- United Kingdom - 6%

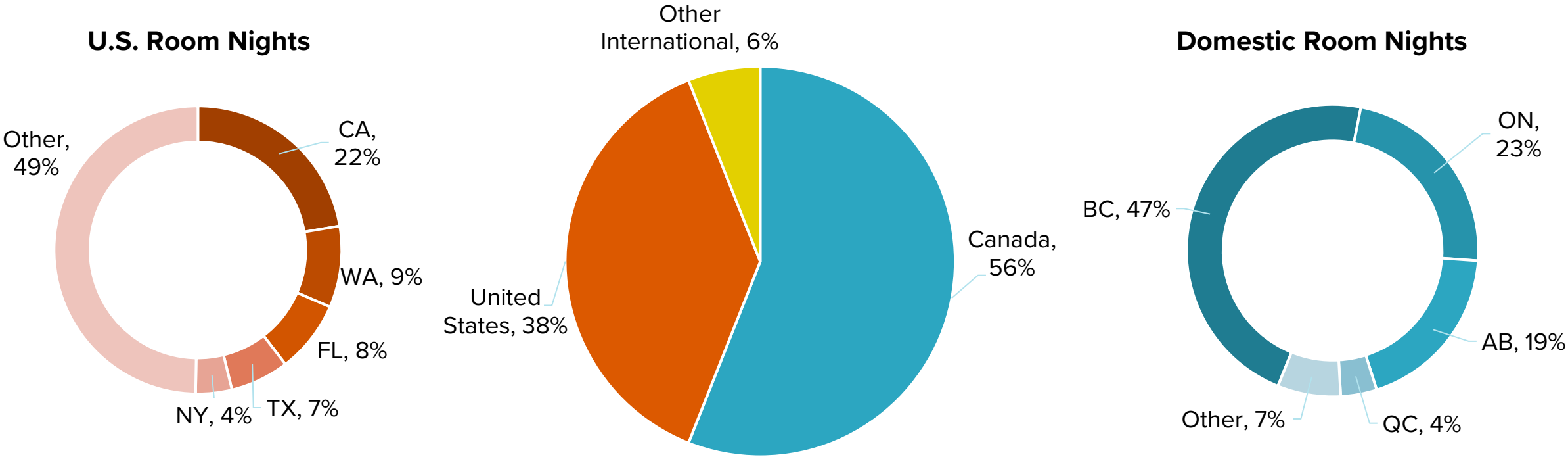
Source: ForwardKeys.

Forward Looking Hotel Bookings – Metro Vancouver

January-June 2022



Source of Destination Room Nights As of January 9, 2022



Source: TravelClick.

Cruise Passenger Traffic



2022 OUTLOOK

325 sailings
970,000 passengers

2019 ACTUAL

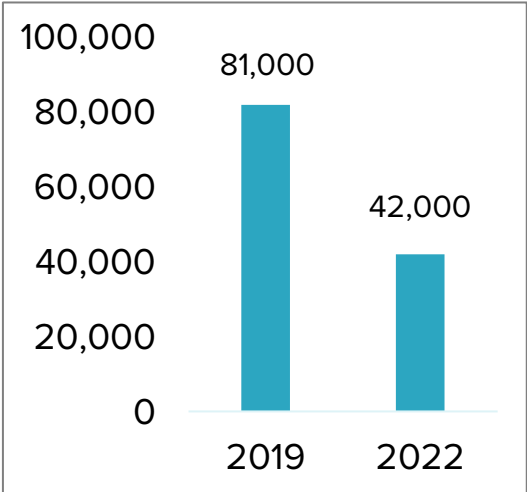
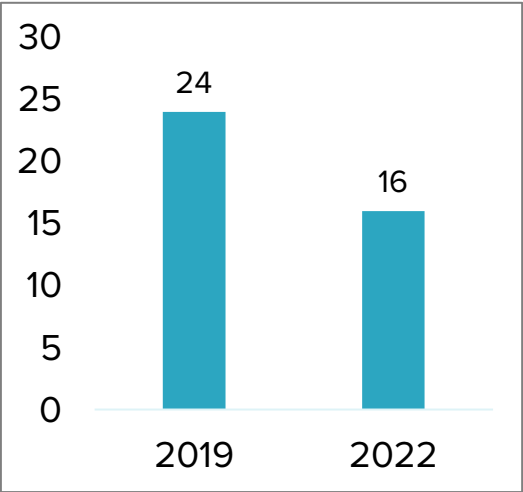
288 sailings
1.1M passengers

Return of Meeting & Convention Business

Number of Bookings and Corresponding Number of Out of Town Room Attendees

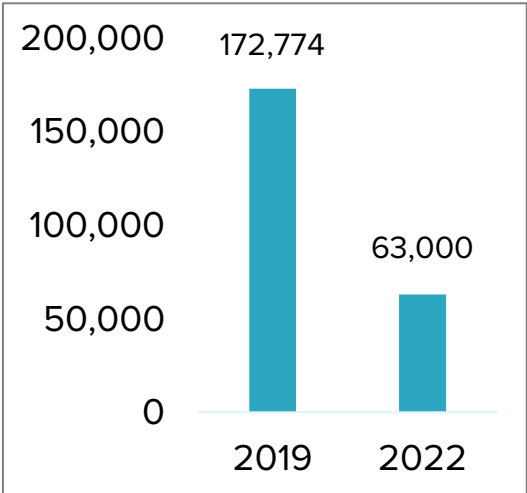
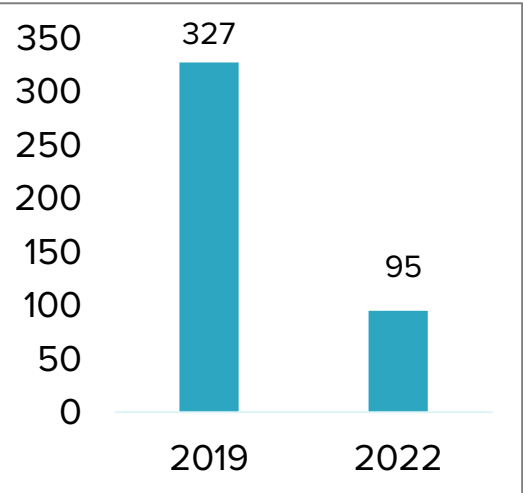


**Citywide M&C definite.
2022 – 4 still tentative**



**Citywide M&C definite
room attendees.
2022 – add 6,400**

**All DVan M&C CRM
definite bookings.
2022 - 106 tentative
bookings**



**All DVan M&C CRM
definite booking room
attendees.
2022 – 48,000 tentative
room attendees**

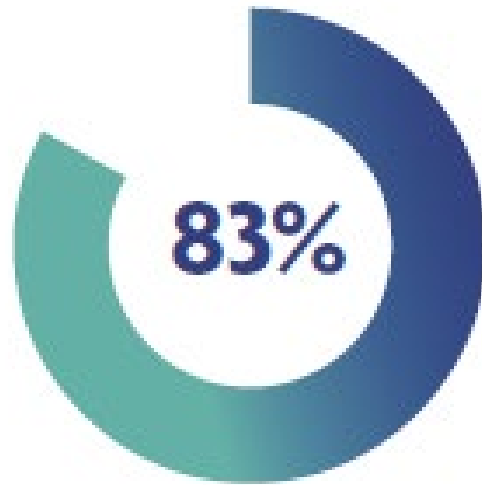
Source: Destination Vancouver.

2019 > 2022 Citywide Out of Town Room Attendees

	2019 (24)	2022 (16)	2022 VD (3)	2022 T (1)
January	1,395	0		
February	1,500	0		
March	4,700	5,428		
April	10,800	1,600		
May	4,500	6,548		
June	25,850	6,030		
July	5,000	3,465	1,060	1,500
August	0	8,000		
September	5,400	5,195	2,880	
October	4,239	2,410		
November	9,660	3,000	1,000	
December	7,920	0		
	80,964	41,676	4,940	1,500

Changing Traveller Values

Relevance of sustainability among global travellers



Of global travellers think sustainable travel is vital



Of global travellers expect the travel industry to offer more sustainable travel options



Of global travellers say the pandemic has made them want to travel more sustainably in the future



2021 – 2022

Business Sprint

Rebuild & Restart



MANDATE

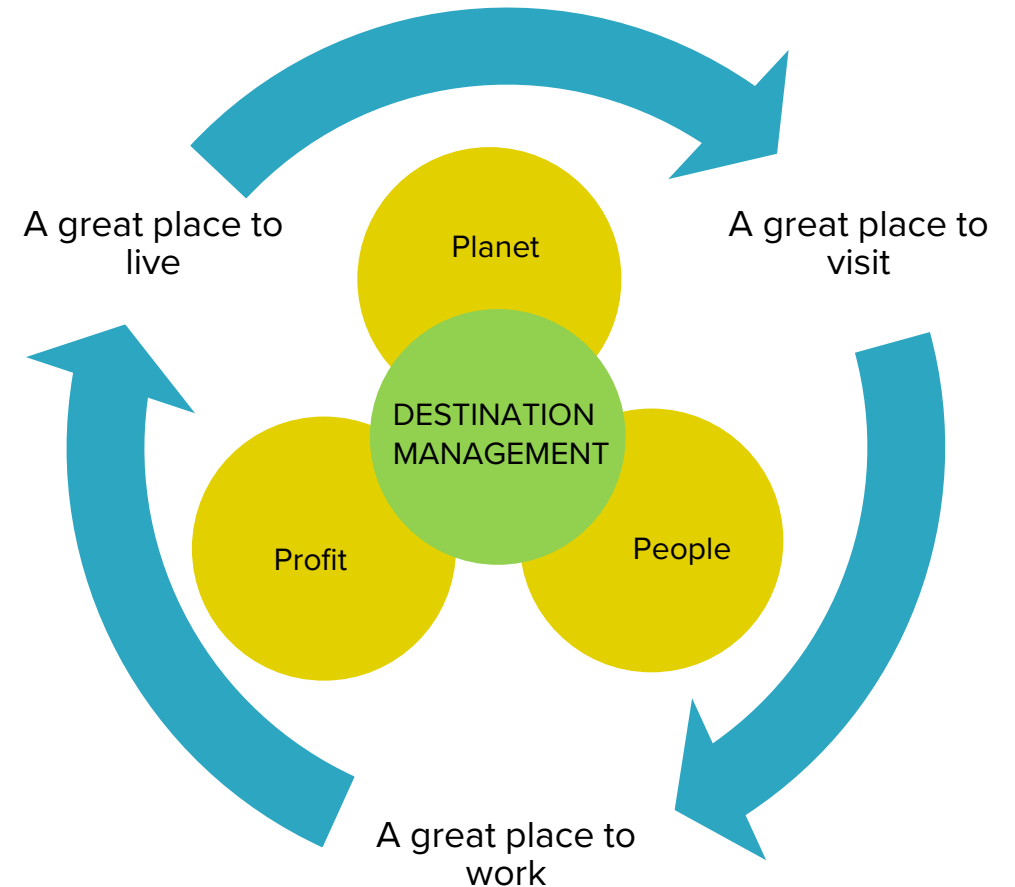
To support Vancouver's tourism industry in developing their experiences, and promoting Vancouver in target Canadian, US, and international markets.

MISSION

To responsibly rebuild a sustainable visitor economy to \$13B by 2026.

PURPOSE

To transform our communities and our visitors through the power of travel.



BUSINESS SPRINT FOUNDATION



- **Strategy Led**
- **Insights Driven**
- **Industry Partnered**

***\$13B**

*based on same day & overnight

DESTINATION VANCOUVER

FOUNDATION

DESTINATION MANAGEMENT

DEVELOPMENT

PROMOTION

FOCUS AREAS

REBUILDING
DEMAND

DESTINATION
STEWARDSHIP

ORGANIZATIONAL
RESILIENCE

PRIORITIES

STRATEGIES

TIME

BUSINESS SPRINTS

ROI

PEOPLE PLANET PROFIT





REBUILD DEMAND

Rebuild Vancouver's visitor economy by leading, leveraging and collaborating on opportunities to drive visitation and spend.

PRIORITIES

- Collaborate to **maximize alignment** and efficiency
- Partner in the **rebuild of air** services
- Prioritize **converting business**
- Create champions to **build future demand**
- Increase **length of stay**
- Create **urgency for travel**
- Partner in the **rebuild of air** services
- Redefine the future of **visitor servicing**



DESTINATION STEWARDSHIP

Bring to life our purpose and destination values to strengthen Vancouver's global reputation through partnerships.

PRIORITIES

- Action **environmental and social sustainability**
- Identify impact of pandemic on **product development**
- **Advocate** for the needs of members and industry
- Evaluate **membership strategy**
- **Activate the MOU with ITBC**
- Develop a **Major Events plan**



ORGANIZATIONAL RESILIENCE

Enable Destination Vancouver's culture and capabilities to anticipate, respond and adapt to change and remain relevant and financially stable.

PRIORITIES

- Invest in **our Team**
- Increase-productivity, **relevance** and **value**
- **Stand up for reconciliation, diversity, equity and inclusion**
- Strengthen **insights driven decision-making**
- Enhance **organization relevance and performance**
- Organizational **risks and mitigations**
- **Prudent financial practices**

2022 SCORECARD

FOCUS AREAS	OUTCOME	PERFORMANCE MEASURE	TARGET
Rebuild Demand Rebuild Vancouver’s visitor economy by leading, leveraging, and collaboration on opportunities to drive visitation and spend.	<ul style="list-style-type: none"> Consideration of Vancouver increases Marketing drives business for industry M&C business generated M&C business generated Partnerships rebuild visitation 	<ul style="list-style-type: none"> Organic search traffic Referrals to industry New citywide wins Booking/conversion ratio Visitor volume from key international markets 	<ul style="list-style-type: none"> 1.9M sessions 320K referrals 16 bookings 40% ≥32% of 2019*
Destination Stewardship Bring to life our purpose and destination values to strengthen Vancouver’s global reputation through partnerships.	<ul style="list-style-type: none"> Member businesses value of Destination Vancouver 	<ul style="list-style-type: none"> Member engagement survey 	<ul style="list-style-type: none"> 70%
Organizational Resilience Enable Destination Vancouver’s culture capabilities to anticipate, respond and adapt to change and remain relevant and financially stable.	<ul style="list-style-type: none"> High degree of pride and Team Member commitment Managing G&A 	<ul style="list-style-type: none"> Team Engagement survey Within ≤10% 	<ul style="list-style-type: none"> 72% ≤10%

* Target will be reviewed and updated when 2021 actual visitation statistics available for forecasting. Source: MNP Forecasts.

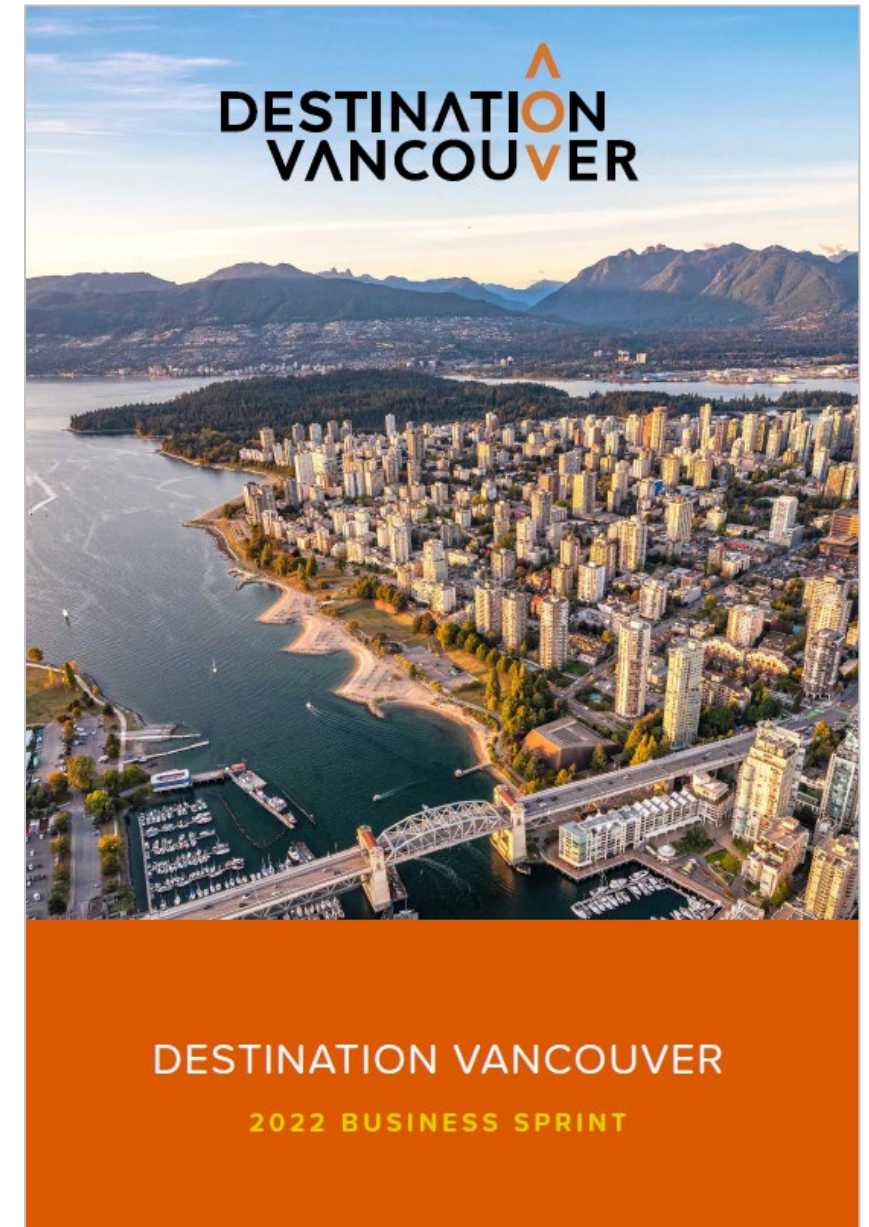
KEY DESTINATION INDICATORS

- Resident Sentiment
- Visitor Sentiment
- Municipal Regional District Tax (MRDT)
- Unemployment Rate Canada
- GDP Canada
- Hotel Room Inventory
- Hotel Occupancy – Metro Vancouver
- Hotel Occupancy – Downtown Vancouver
- ADR – Metro Vancouver
- ADR – Downtown Vancouver
- RevPAR – Metro Vancouver
- RevPAR – Downtown Vancouver



RESOURCES

- **2022 Business Sprint**
 - Shared in this week's Member Enews
 - Available on our website ([About Us](#) section) this week
- **NEW Quarterly Performance Reports**
 - 2021 Q4 Report - available in February
 - 2022 Q1 Report - available in May
- **E-news**
 - Available weekly on Wednesdays



IMPORTANT DATES



- **Upcoming Webinars**

- February 1: Destination Canada presents, *Key Trends Shaping the Future of Canada's Tourism Industry* - [Registration Link](#)
- February TBA: Destination Vancouver business insight and promotion updates. Watch for upcoming dates in E-news.

- **2022 Annual General Meeting** - Thursday, May 19th

A couple is hiking through a dense forest. The man is wearing a red jacket and the woman is wearing a blue jacket. They are walking on a path that is covered in fallen logs and moss. The sun is shining through the trees, creating a bright spot in the center of the image. The word "QUESTIONS" is overlaid in the center in large white letters. In the top right corner, the "DESTINATION VANCOUVER" logo is visible, featuring an orange triangle above the word "ON" and an orange "V" in "VER".

DESTINATION
VANCOUVER

QUESTIONS



Thank You

- Presentation available online:
- www.destinationvancouver.com/members -
 - > Member Resources / Business Resources – Webinars
- Webinar Evaluation – Your feedback is important!