DESTINATION MASTER PLAN
PROPOSAL FOR SAN DIEGO TOURISM
MARKETING DISTRICT CORPORATION

Resonance Consultancy LLLP
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October 16, 2014

Mr. Lorin Stewart
Executive Director
San Diego Tourism Marketing District Corporation
8880 Rio San Diego Drive, Suite 800
San Diego, CA 92108
(619) 209-6108
lstewart@sdtmd.org

Dear Mr. Stewart,

Please find enclosed a digital copy (on CD) and three hard copies of the Resonance Consultancy LLLP proposal and supporting documentation for our bid to produce a Destination Master Plan for San Diego Tourism Marketing District.

Resonance Consultancy is joined in this proposal by:

• Horwath HTL – Global leader in hospitality consulting; and
• TODERIAN UrbanWORKS – Award-winning Vancouver-based consultancy providing services in advanced urbanism, city planning and urban design.

We have enjoyed considering the issues put forward in your RFP, and have prepared a proposal that we are confident will help the Tourism Marketing District organize its efforts to create and agree upon a Destination Master Plan; that will deliver recommendations, strategies and implementation plans that create positive long-term gains for Travel & Tourism; and that will help the tourism industry in San Diego to achieve its fullest economic potential.

Please note that the “Bidders Response Information” is attached as Appendix A with some answers to specific questions referenced in the main document.

Best regards,

Chris Fair
President
OUR UNDERSTANDING
According to “A White Paper Discussion – Tourism: San Diego's 2nd Largest Traded Economy”, dated April 2, 2013:

Tourism is San Diego's second largest traded economy. In 2012, over 32 million visitors generated $8 billion in direct spending on goods and services, thus creating a total economic impact of $18.3 billion for the San Diego region. Visitor spending directly supported jobs for 160,000 San Diegans and produced over $406 million in local tax revenues.

The travel industry plays a vital and critical role in maintaining San Diego's economic health, both for generating revenue and creating jobs. Tourism is largely a service industry, which has employment at its base and provides jobs that can’t be outsourced. One in every eight jobs in the U.S. is affected either directly or indirectly by tourism, and 13 percent of all employment in San Diego is directly supported by traveler spending.

In 2007, City leaders warned that due to the City's dire financial crisis, there would be no future funding of tourism promotion unless the industry found a way to privately fund sales and marketing of San Diego.

In response to the City's financial situation, the lodging industry established the San Diego Tourism Marketing District (TMD), one of the first of its kind in the nation. The TMD united the lodging industry, which voted to self-assess in order to raise funds to support the SDTA and promote San Diego. A 2 percent assessment fee was levied on lodging establishments with 70 rooms or more. The TMD relieved the City of San Diego from funding tourism promotion and the SDTA, thus saving the City $10.4 million per year in obligations – $52 million total over the lifespan of the first district.

The formation of the San Diego TMD created a new public-private partnership that relieved local government from funding tourism promotion while protecting the vitality of the tourism economy. Since 2008, the SDTA has received its funding from the TMD versus City TOT. The SDTA program does what individual businesses can’t do for themselves – provide an overarching platform to promote the San Diego Brand, nationally and internationally, to protect and grow destination demand to benefit the San Diego community.

According to the RFP, “The purpose of the 20-year tourism master plan is to provide a roadmap to maintain and enhance San Diego's lodging industry’s competitive positioning relative to other desirable tourism destinations and to anticipate the future state of tourists’ needs and tourist markets. The current and future needs of group meetings and conventions are also a priority, as well as growing future markets such as China.”

Ultimately, the goal of the Destination Master Plan is the “development of long-term recommendations for San Diego as a tourism and meeting destination that will increase the transient occupancy tax (TOT) for the City of San Diego to $300 million by 2020, with subsequent continued growth.”

Target completion date for the Destination Master Plan is June 30, 2015.
BUSINESS IDENTIFICATION & CONTACT INFORMATION
Resonance Consultancy

Shaping the Future of Destinations Around the World

Resonance Consultancy creates marketing strategies, development plans, and tourism policies that shape the future of destinations and developments around the world.

Our team has advised destinations, communities, cities and governments in more than 70 countries. We provide leading public and private sector organizations with visioning, trend forecasting, marketing strategy, stakeholder engagement, tourism development strategy, and tourism policy to help places realize their full potential.

From Bucharest to Brasilia, Hawai‘i to Haiti, we have helped clients understand consumer trends, influence policy, engage their communities, plan for the future, and market their unique destinations. Our future-focused visions, reports and development strategies help our clients find their way forward, provide plans for action, and give officials, investors and the public ways to engage and reasons to believe.

The principals of Resonance have more than a half-century of development and tourism experience, and have completed more than 100 visioning, strategy, planning, policy and branding projects for destinations and communities in 15 states and more than 70 countries around the world. Together, we’ve created an integrated process that helps both public and private sector clients look ahead – ahead of the curve, around the corner or a decade from now. Our work helps foster community, preserve cultural heritage, protect the environment and generate economic benefits for all those involved.

Resonance Consultancy was incorporated in Vancouver in 2007 and maintains a branch office in New York. The company is owned and operated by Chris Fair, Richard Cutting-Miller and Dianna Carr with a total staff of seven full-time employees. Resonance Consultancy and its principals are members of the Destination Marketing Association International, the Urban Land Institute, the U.S. Travel Association and the Travel & Tourism Research Association.

Approximately 50% of Resonance Consultancy business is represented by this type of project.

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For this Destination Master Plan project, Horwath HTL and TODERIAN UrbanWORKS will be subcontracting and reporting directly to Resonance Consultancy.
Horwarth HTL

As a global leader in hotel advisory services, Horwarth HTL is uniquely positioned to provide both the depth and breadth of advice required by leading hotel owners, investors, financiers, operators and destinations. The global team of Horwarth HTL comprises 52 dedicated offices in 37 countries, with more than 200 professionals dedicated to hotel, tourism and leisure projects and is the world’s largest consulting organization specialized in the hospitality industry.

Horwarth HTL adds value for clients through in-depth market knowledge both in established and emerging markets, financial and hospitality technical expertise and unrivalled experience. Our services include market and feasibility studies, valuations and appraisals, asset management, strategic planning, operator assessment and selection, hotel consulting, industry research and project development services. Within the area of Market and Financial Feasibility studies we have a particular expertise in virgin and emerging markets.

Horwarth HTL adds value for clients by combining hospitality and financial technical expertise with in-depth market knowledge both in established and emerging markets and unrivalled industry experience. We specialize in researching and understanding markets with a view to preparing comprehensive project feasibility studies for a range of stakeholders including prospective owners, operators, developers and funders. All of our staff are trained hospitality consultants with a background in hotel operations. Our extensive experience of undertaking a broad range of hotel consultancy engagements across North America is supplemented by engagement specific primary research undertaken both during and subsequent to a fact-finding mission to the proposed location for the development in question. Our comprehensive feasibility study reports are widely regarded and accepted as authoritative studies and we always strive to offer the best impartial advice to all of our clients.

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TODERIAN UrbanWORKS

TODERIAN UrbanWORKS is an award-winning Vancouver-based consultancy providing city planning, urban design, municipal innovation and advanced urbanism services across Canada and globally. Launched early in 2012 by former Vancouver Director of City Planning Brent Toderian, TUW builds on Brent’s unique public and private sector work in Vancouver and across Canada, as well as his experience as a leading international voice in city-building + urbanism.

TUW’s work combines creativity and innovation with the kind of pragmatic results-focus that actually changes cities for the better. Our work isn’t about business-as-usual – it’s about making our cities and communities more successful, resilient, sustainable and vibrant. TUW has a unique ability to understand and work with the needs and aspirations of cities; to “read the moment” a city finds itself in, and advise and assist in how to make the most of that moment, with fresh thinking, creativity, and a drive for real results. This attention to the “will and skill” required for creative city-making not only supports planning and design, but also supports culture change and capacity-building where it’s needed.

TUW’s work doesn’t sit on a shelf collecting dust. Our work, our collaborations, are city-changing.

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QUALIFICATIONS, EXPERIENCE AND BACKGROUND
Research
No Destination Master Plan is complete without world-class research. Economic research, market research, travel trends research, competitive research and consumer research – coupled with focus groups and one-on-one interviews – are just a few areas of expertise we provide for our clients when helping them to create destination development strategies. In partnership with the Luxury Institute, Resonance also conducts a national biennial study of U.S. Affluent Travelers and publishes the Resonance Report, a summary of U.S. affluent household values, aspirations and intentions with respect to travel and leisure.

Business Planning
Our future-focused strategic business plans are roadmaps for a destination that dig deep by engaging stakeholders and articulating a clear and manageable framework for implementation. They start with an analysis of vision, mission and core values and work through to objectives and the strategies needed to reach them. A Resonance business plan leaves no strategic stone unturned, be it financial strategy, human resource plans, budgeting and forecasts, advertising and PR, or metrics and KPIs.

Tourism Policy
Policy development is a lynchpin in sustainable tourism development. We help destinations identify policies that may be inhibiting growth, and understand others that can ensure the long-term health of a tourism industry. We help travel and tourism companies and destinations impact policymaking and legislative and regulatory processes, aid with the adoption or amendment of laws, work toward regulatory relief or protection, obtain government appropriations for project funding, and raise or improve a client’s profile with policymakers. We’ve done policy work for destinations as varied as Namibia, Singapore and Brunei, and we understand the complicated mechanics behind sound tourism practices.

Development Strategy & Tourism Master Planning
A tourism master plan identifies a wide range of priorities that guide a destination toward a long-term goal for tourism growth. A plan must engage stakeholders to identify challenges and opportunities; involve local government so that infrastructure and policy may be designed for visitors as much as residents; and articulate products, amenities, programming and experiences that will differentiate a destination in today’s hypercompetitive climate. Our recent work creating the City of Vancouver’s first ever tourism master plan illustrates our capacity to produce in-depth research, engage a broad range of tourism stakeholders, and create a consensus strategy and action plan that are embraced by public and private sector organizations and stakeholders alike. Our work with governments such as the City of Calgary and Haiti’s Ministry of Tourism is rejuvenating and revitalizing regions.

Marketing Strategy & Place Branding
Creating a differentiated brand positioning for a destination, be it a community, city or country, can result in the creation of a brand that will resonate both at home and abroad. The Resonance approach to place branding defines destinations as more than the sum of their parts. We consider the tangible and logical hardware – infrastructure, geography, attractions and transportation – and we also engage the community to identify unique, emotional software – the programming, sights, sounds, culture and experiences that make a place memorable. With buy-in on those elements and an alignment of messages, we can help chart strategies to leverage these many strengths so they grow the whole community – industry, residents and visitors alike.
Hotel Asset Management

Understanding what strategies and management practices result in increased cash flow and asset value, we take an assertive position in an asset management role as owner representative to maximize returns and asset values over time. We assess, explore and make detailed recommendations on how to improve business performance, whilst evaluating your internal processes against the best the industry can offer.

Hotel Planning and Development Services

Getting the planning and development right is fundamental for any hotel, tourism and leisure project. Our international team of experts will use their project experience, market research and analytical capabilities to help you navigate the entire process. We can spot development opportunities, recommending the concept and product that will realize its full potential.

Tourism & Leisure Services

Public policy and framework play a fundamental part in the development and success of tourism initiatives and form the backbone of our expertise. We work together with local offices and governmental bodies to fully develop a strategy based on technical skill and international best practices to create viable long-term schemes that will create value and sustainability. At this stage of the development, we offer a range of services to scope out public policy, examine the long term development and the likely economic impact they will have, develop master plans, specific concepts, feasibility studies, strategic, operational and marketing plans.

Hotel Transactional Advice

Through our industry expertise and extensive involvement with successful hotel financing and transactions of all sizes, we are able to undertake both the Principal Advisor and financial consultant roles in the due diligence process, offering clients an unparalleled depth of understanding concerning the critical issues and steps affecting transaction closure. We have also frequently taken the receiver role in cases of insolvency, including management of the asset disposition process. In all cases, our specialist advisory services are particularly effective for reducing transaction risks and expediting transaction completion to our client’s optimal satisfaction. These services can be provided for a single property transaction, or as part of a portfolio investment, or to support a financial or public market deal.
Hotel Valuation Services

Today, Horwath HTL is the leading industry expert retained by major hotel owners, lenders and operators to optimize their investment returns. We employ a sophisticated Discounted Cash Flow (DCF) valuation approach recognized as the standard by investors in the hospitality industry. In our experience, sophisticated investors use replacement cost and sales comparisons only as secondary references. The DCF valuation process involves thorough review of the market, quantification of current and future market demand and most importantly, projection of a property's potential future operating and financial performance based on assessment of its competitive attributes and characteristics. Discount rates based on prevailing investment trends and the weighted average costs of debt and equity are then applied to the projected net cash flows and aggregated to derive the property's present value. Often, we also identify the potential upside opportunities associated with strategic repositioning through rebranding and/or capital improvements to derive a value reflecting an asset's optimal performance.

Health and Wellness

Horwath HTL Health and Wellness offers a full range of consulting and management services that make a difference in hotel and spa performance. From preliminary market research and feasibility work that helps determine if, what and how a property should be created, positioned and run in a given location to taking responsibility for its ongoing management and success.
CITIES, TOWNS + COMMUNITIES
PLANNING + URBAN DESIGN + MASTER PLANNING

Brent Toderian has successfully led city, town, and community-scaled planning + design exercises in four provinces and one territory across Canada. He has also provided advice and consulting on complex planning and design issues for cities in the United States, Europe, Australia, New Zealand, South America and Asia. As a recognized national and international leader in planning, design and advanced urbanism, Brent’s work integrates visioning and policy planning; urban form, master planning and design; social and economic development; and smart growth + sustainability. His work is known for uniting vision and implementation, in innovative ways, with strategic and effective public engagement.

An urban generalist, Brent’s experience includes city-wide plans and policy; municipal strategic plans; community / area plans; downtown / main street plans and designs; transit-oriented development; active-transport, walkability and biking strategies; urban design and public realm strategies / guidelines; alternative and special design standards; master-planning; growth management and smart growth initiatives; economic development strategies; cultural, social and housing strategies; heritage strategies; and special city-building initiatives.

CULTURE + CREATIVE CITY
INITIATIVES, PLANNING + DESIGN

Brent Toderian believes that culture and art is a 4th component of sustainability and progressive city-building, along with the economic, social, and environmental spheres. In Vancouver, he worked closely with Cultural staff in all aspects of cultural planning, policy and facilities design. He was an active leader in the Creative City Task Force, negotiated cultural facilities and features into proposed projects / designs, was instrumental in new approaches for integrating public art into building and public realm design, and helped develop new procedures and approaches for artist production space and artists live-work units. Brent often acted as a bridge between cultural and transportation experts in the integration of art and events into streets and the public realm, including street activations and installations like the “Picnurbia” street activation.

In Calgary, Brent acted as an unofficial cultural manager in the Centre City before the position was ultimately created. The “Thriving Centre City” cultural and artistic policies and strategies in the Centre City Plan were some of the first integrated cultural policies in Calgary’s downtown. Brent also co-launched the development of a Creative Cultural “precinct” along Stephen Avenue pedestrian mall, aided by UK-based creative cities consultant Charles Landry.

Brent’s downtown revitalization strategies across Ontario and in NWT often included arts and culture, identity, branding, public life and public art strategies, as well as place-making initiatives. These contributed greatly to economic and civic revitalization.
Brent Toderian is a nationally and internationally recognized authority and practitioner in downtown, main street and waterfront planning and design. Brent's work in the 1990's as an Ontario-based consultant included downtown + main street projects in over a dozen cities and towns, from Toronto to Yellowknife. Early in his career, Brent became a key voice in downtown revitalization and transformation in Canada. His work built on his training and certification in Professional Downtown Management with the National Main Street Center in Washington D.C.

He has since gone on to lead innovative and award-winning downtown planning and design in two of Canada's fastest changing downtowns, Vancouver and Calgary, as well as provide downtown and waterfront peer advice globally.

In Vancouver, Brent successfully transitioned the visioning for the Central Area from “Living First”, to a complex and complete “Downtown that Works.” Much of his planning and design work as Chief Planner was dedicated to complex issues in and around the Downtown Peninsula, including the Metro-Core Jobs and Economy Strategy, downtown urban design and master planning, the Viaducts / Eastern Core Re-Visioning, Olympic Village design/implementation, new Skyline-Shaping and View Corridors strategies, and many street activation initiatives. He led complex strategies in the Downtown East-Side, Chinatown, the West-End and the Waterfront.

In Calgary, Brent re-visioned disconnected downtown initiatives into the new “Centre City Family of Plans”, including the multiple-award-winning Centre City Plan. He led all design, special initiatives and implementation in Centre City, while at the same time transforming the approach, positioning and attitudes around Centre City success.

Brent's downtown planning work has been profiled in international publications and press, including the Discovery Channel, CNN International and The New York Times.

Brent Toderian is a strong proponent and practitioner of “complete cities and complete communities”, and the most challenging aspect of such is often strong, integrated and diverse job-space. In Vancouver's Downtown and Broadway Corridor, Brent led strategies that protected and expanded job-space capacity to ensure a “Downtown that Works” in the face of strong residential speculation and pressures. He led the strategic amendment of older industrial policies next to mass transit to facilitate economic development and transit ridership, while protecting but re-visioning key older industrial lands for new forms of manufacturing and production. Brent led the creation of the City's first Green Enterprise Zone initiative, and participated actively in Vancouver's first city-wide Economic Development Strategy. Protecting and expanding job-space lands for resilient cities has become one of the most important city and regional issues in Metro Vancouver, in part through Brent’s leadership and work.
In Calgary, Brent initiated the City’s first cost-of-growth processes for inner-city and suburban development, co-led the City’s Employment Centre Strategy and Jobs / Housing Balance Strategy, and stressed job-space and office development in the “Thriving Centre City” theme of the award-winning Centre City Plan. He oversaw master-planning of numerous industrial and mixed-use developments, including the largest planned office / institutional town centre planned for the city, the Seton District.

In Ontario, Brent led the largest municipally-initiated Study / Strategy on Economic Development and Tourism to that date, on behalf of seven coordinated municipalities in the Georgian Triangle region of Ontario, centred on Blue Mountain.

In all three provinces, and for the public and private sector, Brent led planning and design processes and the negotiation of office, job-space, industrial and mixed-use projects.

SPECIAL INITIATIVES + PROJECTS
PLANNING, DESIGN + “OUT-OF-THE-BOX” THINKING

As a strategic, creative and effective leader in both the public and private sectors, Brent has often been called upon to create, lead or actively participate in unusual processes, projects or initiatives. Brent believes in urban leaders playing the role of what author Charles Landry calls “the Civic Creative”, thus he enjoys non-traditional roles, and challenges that require innovative and out-of-the-box thinking.

No-where was such thinking more necessary, than in the strategy, planning, design and preparation leading up to (and the successful hosting of) the 2010 Winter Olympic Games in Vancouver. This included the design, negotiations, and implementation, as well as the design review process itself under crushing time-frames, for the Olympic Athletes Village (shown in the picture above).

Brent has initiated international ideas competitions and has been a juror in many such competitions and awards. He has reviewed and revitalized public engagement processes in both Vancouver and Calgary, to make them more “engaging”, effective and interesting (and as Brent puts it, more “human”). He has managed, created, and restructured complex public benefits and development costs processes to ensure that amenities and housing diversity can be provided as part of “density done well”. He has led and engaged in First Nations processes and negotiations, assisted in the negotiations of amalgamating municipalities, and has provided peer advice to dozens of global cities, both from Vancouver, and as a guest of these cities.
Brent Toderian believes that advanced urbanism requires a complete integration of land-use and mobility thinking. He currently provides strategic transportation advice to the cities of Auckland, Sydney & Medellin, and to many other cities in the context of complex city and community-scaled policy and planning.

Brent was co-leader of Vancouver’s city-wide and downtown Transportation Plan Update; co-steered all transportation and land-use decision-making for the City; co-led the Green Mobility Task Force as part of the Greenest City Action Plan; oversaw planning and design along the Cambie Corridor Subway Line and UBC/Broadway Corridor Transit Corridor; oversaw planning and design around the City’s planned new Downtown Multi-Modal Transportation Waterfront Hub; actively participated in all strategies, planning and design around expanded cycling, walking and transit capacity; and was instrumental in a culture-shift from streets as places of movement only, to places of gathering, events and every day living as well as movement.

In Calgary, Brent was a key participant in the Centre City Transportation Plan; championed the study to convert avenues from one-way to two-way in the Centre City; oversaw the creation of new street classifications and alternative design standards, as well as customized standards on special projects; and oversaw the critically important downtown parking strategy as a method of promoting mode-shift to transit. Brent led many active and alternative transport initiatives that led to significant change.

In Ontario, Brent’s downtown and community processes had integrated transportation and land-use considerations. Brent led numerous transportation exercises / workshops in Waterloo and Kitchener, and co-managed the Uptown Transportation, Movement and Urban Design Strategy as well as the Downtown Kitchener Parking and Design Strategy.
Chris Fair, President  
CFair@resonanceco.com  
Vancouver, British Columbia

A futurist, facilitator and strategist, Chris holds a Masters degree in Studies of the Future and has married his marketing expertise with futures methodologies to help a wide variety of clients envision and create development strategies, plans, policies and brands that shape the future of places around the world. As president of Resonance Consultancy, Chris leads a team that has completed more than 100 visioning, strategy, planning, policy and branding projects for destinations and cities such as Vancouver, Calgary, Cincinnati, Aruba, Hawaii, Haiti and Ireland.

A contributing industry expert to DMAI’s Destination NEXT project, Chris frequently speaks on tourism and social trends to organizations such as DMAI, the Urban Land Institute, CEOs for Cities, Association of Travel Marketing Executives, World Leisure Congress, and the World Future Society. He has been featured in Fast Company magazine and is a frequent commentator on lifestyle and leisure trends for leading publications such as The Wall Street Journal, Bloomberg, The Globe & Mail, Los Angeles Times, and Worth magazine.

In 2013, Chris was recognized as the “Place Branding Thought Leader of the Year” at the World Sense of Place Summit. He recently designed Resonance Consultancy’s new Place Equity Index®, which analyzes and ranks 130 U.S. cities based on a unique benchmarking model that blends core statistics with millions of consumer ratings and reviews in 30 different categories to benchmark the relative attractiveness (for talent, investment and tourism) and “place equity” of one U.S. city to the next.

Chris is a bilingual Canadian who was granted permanent residence in the U.S. as an “individual of extraordinary ability.” After living in the U.S. for the past 12 years, Chris and his family recently relocated to Vancouver, B.C.

Qualifications
Master of Science (Studies of the Future), University of Houston, Houston, Texas USA, May 2006
Bachelor of Arts (Journalism), Concordia University, Montreal, Quebec, Canada, August 1994

Membership in Professional Associations
He is a member of the Destination Marketing Association International, Urban Land Institute, the World Leisure Organization, the Luxury Marketing Council, the Luxury Board, and the Association of Professional Futurists.

Current And Previous Positions
President, Resonance Consultancy Ltd., Vancouver, BC: 2007 – present
President, IMI Resort Marketing LLC, Greenville South Carolina, USA: 1999 – 2007
President, Ryan & Deslauriers Communications Ltd. Montréal, Québec:1996-1999
President, Traveller Infomedia Corp. Mont-Tremblant, Québec:1993-1996
Richard Cutting-Miller, Executive Vice-President
RRCM@resonanceco.com
New York, New York

Richard R. Cutting-Miller has produced more than 50 Strategic Plans for tourism-focused economies (national, state and regional) ranging from China, Hong Kong and Macau to South Carolina, the Former Soviet Union, the Caribbean and Montenegro.

A 25-year travel industry veteran, Richard was Executive Vice President for the World Travel & Tourism Council (WTTC) and played a principal role in shaping and directing the organization, policy agenda, research program, communications and membership services for the organization.

During his 16-year tenure with WTTC, Richard travelled worldwide, consulting and speaking on the topic of Travel & Tourism economics, policy and advocacy, and produced more than 100 strategy and policy projects for regions such as the Caribbean, the Mercosur and APEC, and countries as diverse as China, Montenegro, Qatar, Indonesia, Australia, Thailand, Namibia and South Africa. In total, Richard has worked in 65 countries and more than 350 cities.

Prior to joining WTTC, Richard served as a management consultant for Deloitte & Touche in New York. As a member of the firm’s Travel & Leisure industry practice, he managed a number of Travel & Tourism consulting projects, including the Strategic Plan for Tourism for the State of Hawai’i.

Qualifications
Master of Business Administration (Finance), Southern Methodist University, Dallas, Texas, USA, 1986
Bachelor of Science (Mathematics) University of Oklahoma, Norman, Oklahoma, USA, 1983

Membership in Professional Associations:
Travel & Tourism Research Association, U.S. Travel Association, Pacific Asia Travel Association, UN World Tourism Organization

Current And Previous Positions
Executive Vice-President, Resonance Consultancy Ltd. 2012-Present
Founder and Principal, Tourism Policy Group, 2012
President & CEO, Tourism ROI LLC, 2007-2012
Executive Vice President, Vice President Research and Economics, Director Policy Development and Research, World Travel & Tourism Council, 1991-2007
Dianna Carr, Vice-President
DCarr@resonanceco.com
Vancouver, British Columbia

For the past two decades, Dianna has honed her storytelling skills in print, television, radio, video and across social media as a journalist, advertising creative director, writer and consultant. As the Vice-President of Resonance Consultancy, she has helped organizations and destinations tell the stories that define sense of place, articulate values and vision, and market new products, urban neighborhoods, resort communities, regions and tropical islands.

Dianna has particular expertise in distilling the narratives that emerge from stakeholder workshops and community engagement, and finding language that moves and rallies a wide range of participants and stakeholders. Her keen curiosity and singular prose style has found its way into every medium in the past two decades.

In the Travel & Tourism sector, Dianna has been a communications and branding consultant to clients such as Four Seasons Hotels, Fairmont Raffles Hotels, Parks Canada, Intrawest, Hyatt, Auberge Resorts, and the Kor Hotel Group.

Her storytelling career began in journalism in Vancouver, British Columbia and Montréal, North America’s most European city, where she became editor-in-chief of the city magazine there, then founded MTL, another city lifestyle publication. Her knowledge of and passion for the city landed her at the Canadian Broadcasting Corporation – where she worked as a columnist, writing and performing weekly radio scripts on a wide range of cultural subjects – and on-camera at CTV, a national television broadcaster.

Over a decade in advertising with global advertising agency DMB&B and many others, she wrote print, radio and television campaigns for cultural institutions, tourism destinations, cars, consumer goods and many other clients, eventually working as creative director.

The booming resort real estate market led to an enduring passion for place branding with work on destinations from Mont Tremblant, Québec to Les Arcs in France and many American places in between. Most recently, as a founding partner at Resonance, she has written detailed strategic narratives for cities, regions and companies – stories that help articulate desired futures and differences to help set people, culture and place apart.

Qualifications
Certificat en culture et civilization, Université d’Aix-Marseille, France, 1977
Post-Graduate Certificate in Journalism, Vancouver, BC, 1979

Current And Previous Positions
Vice-President, Resonance Consultancy, Vancouver: 2007-present
Creative Director, Envisioning and Storytelling, Vancouver: 2005-2007
Creative Director, Ryan and Deslauriers, Montréal: 1996-2005
Copywriter, DMB&B, Montréal: 1990-1995
Editor, Montréal Calendar and MTL Magazine: 1985-1990.
Joel Rosen, Chairman Emeritus
jsrosen@horwathhtl.com
Toronto, Canada

Joel Rosen is Chairman Emeritus of Horwath HTL’s Global Hospitality Practice and oversees the firm’s Canadian practice.

Joel received a Bachelor of Arts, from the School of Hotel, Restaurant and Institutional Management at Michigan State University in 1973. Mr. Rosen received his designation as a Certified Management Consultant (CMC) from the Institute of Management Consultants of Ontario, in 1976. He has completed courses, at the Harvard Graduate School of Design in Golf Course Development and Appraisal in 2002, and in Real Estate Appraisal through the University of British Columbia in 2003.

In June of 1973, Mr. Rosen joined the Toronto office of Laventhol & Horwath, an accounting and management consulting firm specializing in the hotel industry. In 1975, Mr. Rosen helped form the firm Frank Wolman Associates, a consulting practice focusing specifically on the hotel and tourism industry.

Mr. Rosen launched his own firm in 1979, providing management consulting and operational services to hotels and restaurants. In 1980, he joined his firm with Consolidated Hotel Management. Mr. Rosen became Vice-President of Consolidated and was responsible for the management of the firm’s owned and operated hotels.

He rejoined Laventhol & Horwath in 1984, and became a partner of the firm in 1988. He was named President of LTI Hotel Management Corporation, (a subsidiary of Laventhol & Horwath), with the primary responsibility of managing hotels on behalf of the firm’s clients including independent owners and major financial institutions.

In 1990, the partners and professional staff of the Toronto office of Laventhol & Horwath merged with Price Waterhouse. Mr. Rosen was placed in charge of the marketing and management services practice of the Hospitality Consulting Group.

In June of 1992, Mr. Rosen joined Delta Hotels & Resorts as Vice-President of Marketing and Sales. During his tenure at Delta, he represented the company's interest in Supranational Hotels. He was elected to the Executive Committee of Supranational and held the position of Vice-Chairman. Supranational Hotels is an affiliation of international hotel companies and one of the world’s largest reservation referral systems.

In September of 1995, Mr. Rosen formed his own firm, Horizon Hospitality Group, a management consulting practice, specializing in strategic marketing, hotel, resort and golf course development and management, feasibility studies, valuations, property tax appeals and franchising. While continuing the operation of Horizon, in the spring of 1996, Mr. Rosen joined with a group in Montreal to relaunch Horwath Consultants Canada (now Horwath HTL), of which he was named Chief Executive Officer.
In 2000, Mr. Rosen was elected Chairman of Horwath International’s global hospitality consulting practice, a position he held until 2004.

Mr. Rosen’s areas of expertise include: Market Analysis, Feasibility Studies, Valuations, Asset Management, Due Diligence, Strategic Planning, Litigation Support, Financing, Property Tax Assessment Appeals and Management Contract Negotiation for hotels, resorts, gaming and entertainment facilities.

Mr. Rosen is a frequent lecturer at universities and speaker at conferences on tourism development, hotel investment and development, marketing, strategic planning, operational management and customer service. He has lectured at the University of Guelph, Ryerson Polytechnic University and George Brown College. He has been a featured speaker for the Institute for International Research, the Direct Marketing Association, the internationally acclaimed New York University’s Hospitality Industry Investment Conference, the Canadian Hotel Industry Investment Conference and the Asia-Pacific Hospitality Industry Investment Conference.

He is the author of articles on Valuation of Hotels for Property Tax Assessment, Vacation Ownership, Marketing Alliances, Customer Service and is the primary author and contributing editor of the CCH publication Canadian Hospitality Industry Guide. Mr. Rosen has conducted engagements on behalf of private and public sector clients in Canada, the United States, Mexico, Caribbean, Europe, Asia and China.
Paul Breslin, Principal  
pbreslin@horwathhtl.com  
Atlanta, Georgia

Paul Breslin, Principal of Horwath HTL, is a 30-year veteran of the hospitality industry. His background within the industry is all encompassing, as he has extensive experience in hotel operations, development and asset management with major branded hotels as well as independent and smaller luxury hotels.

After his experience of working with eleven different hotels and resorts in ten different cities over the years, Mr. Breslin founded Panther Hospitality in 2005 to provide consulting services to developers and hoteliers in all aspects of their businesses. In February 2013 Panther Hospitality joined the Horwath HTL network of global consultants. From property acquisition and infrastructure development to the successful opening and operating of a hotel, Mr. Breslin and his team of industry professionals leverage their expertise and customize their services to meet the needs of their global client base. He and his team have successfully consulted on a variety of establishments within the industry, including boutique hotels, both limited and full-service hotels, as well as luxury hotels. Major brands such as Hilton, Marriott, Starwood, IHG, Hardrock, and Hyatt have worked with Mr. Breslin, as well as independent resort hotels such as the Inn on Destin Harbor, Daytona Beach Resort & Conference Center, Foxhall Resort and Sporting Club and Barnsley Gardens Resort.

Previous to founding Panther Hospitality, Mr. Breslin held positions at the world-famous Fontainebleau Hilton Resort and Spa, the Sheraton San Diego Resort, the Sheraton New Orleans and three convention hotels in Atlanta, Georgia. He became a Certified Hotel Administrator (CHA), which is the most prestigious hospitality certification available to a hotel general manager and hospitality executive. He is also a member of the International Society of Hospitality Consultants and the Hospitality Asset Managers Association, and a founding member of the Atlanta Hospitality Alliance.

Mr. Breslin, who is qualified as a Certified Hospitality Educator (CHE), is also a respected and well-known teacher and leader within the industry. He is the Executive-in-Residence in Lodging in the J. Mack Robinson College of Business, Cecil B. Day School of Hospitality at Georgia State University. The GSU program was recently ranked as one of the top 25 hospitality programs in the nation according to the Journal of Hospitality and Tourism Education. He has trained senior level executives at the Rixos Hotel Leadership Training Program through Sabanci University in Turkey and is a frequent lecturer at national conventions and hospitality industry conferences throughout the United States. Mr. Breslin has also been quoted on hospitality issues in publications such as The Wall Street Journal, USA Today, Atlanta Business Chronicle, Atlanta Journal-Constitution and The Miami Herald. He has also appeared on the Clark Howard Show.

In addition to his work as a consultant and educator, Mr. Breslin provides hotel expert witness services to attorneys specializing in litigation, bankruptcy, real estate, franchising, employment and personal injury cases related to the hospitality industry. His caseload as an expert witness over the years includes work with both plaintiffs and defendants.
John Montgomery, Principal  
jmontgomery@horwathhtl.com  
Denver, CO

Mr. Montgomery has more than forty years of hospitality industry experience, including over 30 years of financial and operational consulting. His consulting work, which was performed when he was a Senior Principal with an international consulting firm and most recently with Horwath HTL/Lodging & Hospitality Consultants Inc. was for a variety of hospitality and real estate clients. He had operations and development experience with Hyatt Hotels Corporation and a select-service lodging company. Mr. Montgomery's experience with Hyatt Hotels Corporation involved positions as Corporate Sales Manager and Director of Sales and Marketing. His experience with the select-service lodging company was as a Vice President of Development and Operations.

Mr. Montgomery's involvement in a real estate project often begins with product conceptualization and continues through the market study, facility recommendation, financial analysis and on-going consulting phases. As a consultant, Mr. Montgomery has conducted engagements throughout various states in the Rocky Mountain Region, as well as in the southeastern and southwestern United States.

Mr. Montgomery's areas of specialization include the following:

- Market analysis, conceptual development and financial analysis of a wide range of hotel development projects including full-service, resort, bed and breakfast, budget, economy, limited service, all-suite, convention and historic properties.
- Market analysis, conceptual development and financial estimates for restaurants and athletic clubs.
- Market analysis for recreational real estate including golf courses and ski areas.
- Operational analysis of hotels, motels, restaurants and resorts.
- Concept planning for the development of University/College related lodging properties;
- Market analysis, conceptual development and financial estimates for executive conference centers and city/state convention centers.
- Determination of market position, budgeting requirements and marketing plans for Convention and Visitor Bureaus.
- Litigation support and expert witness testimony

Mr. Montgomery received his BSBA degree from the School of Hotel and Restaurant Management at the University of Denver and has a minor in secondary education from the same university. In addition, he has completed selected graduate level business courses at the Master Business Administration (MBA) program at Abilene Christian University in Dallas, Texas.
Brent Toderian, MCIP, President
brent@toderianurbanworks.com
Vancouver, BC

Brent Toderian is a nationally and internationally respected practitioner with over 21 years of experience in advanced urbanism, city planning and urban design.

Brent launched TDERIAN UrbanWORKS upon leaving the role of Chief Planner for Vancouver after 6 years of significant achievement. His accomplishments included 2010 Winter Olympics-related planning and design; the EcoDensity and Greenest City Initiatives; downtown and inner city planning and design; street activation, active transport & place-making strategies; a new vision for Vancouver’s Viaducts; new city-wide smart growth and next-generation transit oriented development approaches; and inventive job-space strategies emphasizing a “complete city”, not just a livable one. He oversaw all architecture and design review, championing greater diversity and architectural risk-taking. Brent earned his reputation as a hands-on visionary and results-oriented city-changer.

Brent has advised many global cities, from Copenhagen, Rotterdam, Oslo, and Helsinki, to Sydney and Medellin.

Brent was Manager of Centre City Planning + Design in Calgary, as well as the City’s Chief Subdivision Planner. In these roles he pioneered innovative approaches to visioning, design and architectural review, and special initiatives in inner-city and suburban contexts.

His career started with nine years as a leading planning and design consultant based in Ontario, with projects from Toronto to Yellowknife.

A passionate practitioner of creative city-making, Brent is the founding President of the Council for Canadian Urbanism (CanU); a writer for Atlantic Cities, the Huffington Post, Planetizen, and SPACING; a regular columnist on “City-Making” with CBC Radio; and an active participant in many global urban organizations. He is a highly sought-after speaker, teacher and collaborator on issues of advanced urbanism.

Qualifications
Masters, City and Regional Planning, University of Waterloo—Candidate (Focus: downtown / inner-city planning, integrated communities, and urban design)
Honours Bachelors Degree, Urban and Regional Planning (Legal Studies Minor), University of Waterloo, 1992 – graduated 1st in class.
Applied Certificate in Urban Design, Simon Fraser University, Vancouver
Certificate in Prof. Downtown Management, National Main Street Centre, Washington DC USA (urban design, economics, promotion/marketing, organization)

Membership in Professional Associations
Full Member, Canadian Institute of Planners (CIP) and PIBC
Founding President + Director, Council for Canadian Urbanism (CanU)
Founder, CIP National Urban Design Interest Group (NUDIG)
Advisory Board Member, Urban Land Institute (ULI) BC
Writer – Atlantic Cities, Huffington Post, Planetizen, and SPACING magazine.
Regular Columnist on CBC Radio on “City-Making”
Member, CNU National Highways-to-Boulevards Task Force, USA
PlaceMaking Leadership Council, Project for Public Spaces, New York
Fellow, Forum for Urban Design, New York
Chair, CIP 2005 National Conference Program Committee (Calgary). Program Committee National Rep, CIP 2008 (Winnipeg); Convenor of CanU 3 National Summit (Vancouver)

Current and Previous Positions
President, TORDERIAN UrbanWORKS, Vancouver, Canada, 2012 – present
City of Vancouver, Canada, Director of City Planning, 2006 – 2012
City of Calgary, Canada, Manager of Centre City Planning + Design, 2004 – 2006
City of Calgary, Canada Chief Subdivision Planner, 2001 – 2004

Selected Professional Achievements
Ongoing advice to the City of Helsinki, Finland Planning Department on regional and city planning challenges
Ongoing advice to the City of Medellin, Colombia Planning Department on general land use plan and city-making challenges
Advice on new Public Benefits Strategy, as well as proposed new State Planning System for the City of Sydney Planning Department, Sydney, Australia
Ongoing “Density Done Well” consultations and advice, Australian Urban Task Force, Sydney, Australia
“Rethink London” City-wide Plan, Downtown Master Plan + Transportation Plan ongoing advice, City of London Planning Department, London,ON
2022 Winter Olympic Bid; Downtown + Waterfront Planning – ongoing advice, Oslo, Norway Consultant for new Public Benefits + Amenities Strategy, City of North Vancouver, BC
City of Regina “Design Regina” City-wide Plan and related advice on culture change /capacity building, Regina, SK
Fleetwood Town Centre Transit-Oriented Action Plan, City of Surrey, BC
Review and oversight of all architectural and design proposals and applications in the City of Vancouver (2006-2012) and City of Calgary Centre City (2004-2006)
EcoDensity and Greenest City Initiatives, Vancouver, BC
City-wide housing, economic, environmental, transportation, sustainability policies /initiatives, Vancouver, BC
Cambie Corridor Plan and Broadway Corridor Plan, Vancouver, BC
Vancouver Transportation Plan Update + “Green Mobility” Strategy, Vancouver, BC
Laneway Housing + Affordable /Rental Housing Initiatives, Vancouver, BC
Olympic Village Design+Implementation, South-East False Creek planning. Downtown Olympics- related transportation, public space and “spectacles” planning, Vancouver, BC
Northeast False Creek Master-Planning + Vision; BC Place Planning + Design, Vancouver, BC
Arbutus Centre, Little Mountain, + Oakridge Centre Policy / Master Planning, Vancouver, BC
Open Streets /”Viva Vancouver” streets activation program, Vancouver, BC
Metro-Core Jobs + Economy Strategy; Industrial + Job-Space Land City-wide Strategies, Vancouver, BC
Eastern Core Strategy + Viaducts Re-Visioning; Downtown Transportation Hub Master Plan, Vancouver, BC
Centre City Plan and “Family of Plans” (Transportation, Parks, Social Planning Plans etc); East Village, Beltline and 17th Avenue Plans and Design Strategies, Calgary, AB
Parking policy review; Downtown Innovation Zone/Creative Hub; 4th Street underpass visioning; Downtown library re-visioning; Eau Claire master-planning; Centre City Calgary, AB
Inner-city and suburban innovative community designs (Garrison Woods/Garrison Green/ Currie Barracks, “The Bridges” Community, SETON Transit-Oriented Community, Mackenzie Towne); Calgary, AB
Costs of Growth, “Sustainable Suburbs” and Smart Growth leadership in suburbs and inner- city, Calgary, AB
City of Yellowknife Downtown Enhancement Plan and Redevelopment Strategy, NWT and 12 other downtown plans and strategies
Multiple downtown revitalization plans, city-wide plans, community plans, strategic plans, design strategies, and commercial /retail plans for Ontario municipalities.

Selected Awards/Recognition
2013 Canadian Institute of Planners Award of Planning Excellence – City of Vancouver 2040 Transportation Plan
2012 Canadian Institute of Planners + PIBC Awards of Planning Excellence – Vancouver Cambie Corridor Plan
2012 CSLA National Award of Merit – Granville Street Design Transformation
2010 Canadian Institute of Planners Award of Planning Excellence – Olympic Village Neighbourhood Development (numerous additional awards 2009-2012)
2009 Canadian Institute of Planners Award of Planning Excellence – Vancouver EcoDensity Initiative
2008 Canadian Institute of Planners and AACIP Awards of Planning Excellence – Calgary Centre City Plan
2007 Canadian Institute of Planners Award of Planning Excellence – East Fraser Area Development Plan
2000 OPPI Awards of Professional Merit (2) – Preston Downtown Streetscape/Public Realm Master Plan, Cambridge; and Downtown North Bay Action Strategy.
The Resonance team has been passionately shaping places worldwide for decades. We create economic development plans, strategies and master plans, policies, marketing strategies and brands that ensure the success of your destination.

As a team that grows, brands and markets destinations and developments, cities and nations, we envision the future of places, creating and communicating strategies that help prospective visitors, residents and governments imagine them anew. We help our clients understand their tourism development opportunities and challenges, influence policy, provide advocacy services, and create marketing strategies that help places sustainably grow their economies.

Recent clients of Resonance that have benefited from our experience, approach and process include Tourism Vancouver, Aruba Tourism Authority, Haiti Ministry of Tourism, Calgary Municipal Land Corporation, DMB and Alexander & Baldwin for Kukui’ula Resort, Failte Ireland, Cincinnati USA and the World Travel & Tourism Council. Summary descriptions of these projects follow.
Vancouver, BC, Canada – Vancouver Tourism Master Plan

Vancouver is a mature tourism destination that has never had a tourism master plan. Tourism Vancouver wanted to guide the long-term sustainable planning and design of Vancouver and its neighborhoods as tourism destinations by identifying, innovating and articulating potential products, amenities, programming and experiences. Resonance was engaged for the project at the end of 2012 through an international RFP selection process.

From the beginning of the six months of work that resulted in the plan, Resonance sought to engage Vancouverites of all kinds in the process. We began by setting up a website and blog that became an information hub, with background information and news updates to keep interested people abreast of developments and upcoming activities. Throughout the process, we worked with a steering committee of industry representatives, the City of Vancouver and Vancouver Economic Commission: the group collaboratively set goals that centered on economic, environmental and experiential aspects of city tourism.

- Over several months, we undertook some 180 one-on-one interviews with tourism stakeholders from every sector to gather comprehensive input on issues and opportunities facing the industry, and then held a charrette with Tourism Vancouver to focus on key takeaways.
- From there, an online survey was built to bring Vancouverites of all kinds into the process, and a video featuring the Tourism Vancouver CEO and Resonance was created to explain the process and the importance of participation in the survey. Some 2,200 people participated, offering 11,000 written comments.
- From all the combined input, eight areas of focus were determined, from transportation to visitor experience design, infrastructure and product development, neighborhood tourism, advocacy and public affairs and partnerships and alliances.
- Presentations were made to the heads of City departments and to City Councillors to discuss and agree on the findings.

The Vancouver Tourism Master Plan was presented to Tourism Vancouver members, with the press on the occasion of the organization’s Annual General Meeting, with the important support and participation of Vancouver Mayor Gregor Robertson. A presentation and extensive discussion was undertaken with more than 300 TVan members and with the result clearly showing that the City and tourism stakeholders were much more closely aligned in their vision for the industry. Recommendations were offered in the eight areas of focus, with the City and Tourism Vancouver committing to their realization.
Aruba – Aruba Tourism Authority (ATA) Strategic Business Plan

Aruba is a 33-kilometer-long (20 mi) island of the Lesser Antilles in the southern Caribbean Sea, located 27 km (17 mi) north of the coast of Venezuela. Together with Bonaire and Curacao, it forms a group referred to as the ABC islands of the Leeward Antilles, the southern island chain of the Lesser Antilles. Collectively, Aruba and the other Dutch islands in the Antilles are commonly referred to as the Netherlands Antilles or the Dutch Antilles.

The Aruba Tourism Authority has evolved from a government agency to a unique independent legal entity within the public sphere. As the Destination Marketing Organization (DMO) for Aruba, ATA is responsible for uniting tourism interests amongst the on- and off-island stakeholders / partners in order to coordinate destination marketing, business development and partnerships.

The Aruba Tourism Authority commissioned Resonance to update its Strategic Business Plan to provide structural guidance for ATA to move forward into the next stage of professionalization, to outline clear direction and overall goals that are applicable for the entire organization, and to help align the organization with its various stakeholders.

Resonance conducted an internal operational assessment and external marketing intelligence review to create a situational analysis; engaged dozens of stakeholders to identify their opinions, aspirations and ideas for the future strategy of the Aruba Tourism Authority; and conducted an organizational visioning workshop to create a coherent picture of the ATA’s strengths, weaknesses, opportunities and threats. All of this led to a final Strategic Business Plan incorporating a set of short-term and long-term actions for each strategic area of focus, complete with performance measures for each action.
Haiti – Tourism Development Plans

Battered but resilient, Haiti is emerging from decades of dictatorship and disaster. A visionary Tourism Minister is determined to create the tourism infrastructure and experiences that will change the narrative about the country and attract much needed revenue. The ministry wished to focus on three separate areas of potential: Jacmel, an artisan hub; Île à Vache, an island off the south shore; and Môle St. Nicolas, the landing place of Columbus and potential cruise and container port.

Resonance was engaged by the international planning firm IBI to partner in the creation of development strategies for the three areas. Through visioning workshops with Haitian officials and members of the community, Resonance succeeded in articulating a future vision for tourism, urban and industrial development in the three areas, and contributed to the creation of development strategies that outlined steps to take in the creation of new places and new place brands. Jacmel has been positioned as a center of creative tourism, Île à Vache as a retreat into well-being, and Môle St. Nicolas as the keeper of historical memory and a new industrial identity for the country.

In 2013, Haiti again became a credible tourism destination. The three regions of focus have been the subject of positive travel stories from many respected publications, and infrastructure improvements have begun in the regions. The tourism ministry has undertaken a campaign in international markets and brought Haiti closer to other destinations in the Caribbean. As always in Haiti, progress is slow but the results are already visible.
Calgary, AB, Canada – East Village Development Strategy

East Village was a long-neglected 49-acre brownfield site in eastern downtown Calgary that had tremendous potential but needed significant remediation – both in terms of the physical site, and also in the minds of Calgarians, most of whom had a real aversion to the area, even if they’d never been there. The area where Calgary was founded had been excluded from decades of growth and prosperity in the city, and had become the stage of the city’s blight and bad behavior.

An Area Redevelopment Plan was approved in 2003, and in 2007 the Calgary Municipal Land Corporation (CMLC) was formed to execute the ARP. Stable funding, in the form of a Community Revitalization Levy (similar to Tax Increment Funding in the U.S.) was put in place.

While infrastructure work was carried out (some $180 million has been spent to date) Resonance was engaged to conduct research, create a development strategy, work on reconstructing public opinion and brand the new master planned urban village that East Village was becoming. Using research insight, inventive collateral, engaging sales environments, public engagement, advertising, web and social media tools, Resonance created a robust communications strategy that told Calgarians a new story of city living.

We articulated the East Village sense of place through workshops that provided ideas and vivid imaginings of what might be, how people might live, what they could experience and what they would feel around the built environment. And just as CMLC created new streetscapes, underpasses and connections to the rest of the city, Resonance also built bridges to the national, regional and local development communities to present the East Village opportunity.

In the five years since Resonance partnered with the East Village team, the neighborhood has been transformed physically and perceptually. East Village has become a movement, a potent and positive symbol of a new way of life in downtown Calgary. Nearly $1.8 billion in private development has been attracted to the neighborhood, and four major condominium projects with some 1,000 units are under construction or in the pre-selling phase; a dual-branded Hilton will break ground in 2014; a major urban grocery store partner will be announced this year; a National Music Centre museum and entertainment complex is being built; a New Central Library for the city is being designed by international starchitects; and the site’s historical landmark building will be operated by a team of the city’s top foodies. In early 2015, the first wave of new residents in East Village in decades will move into the first new condos in the neighborhood in 10 years.

Resonance has become an integral part of the CMLC team, trusted advisors with deep knowledge of the neighborhood’s history, and was recognized in 2010 with a record five awards from the Economic Developers Association of Canada for our work to revitalize the area.
Kaua'i, Hawai'i – Kukui'ula Brand Strategy and Implementation

Located on more than 1,000 acres on the Hawaiian island of Kaua'i, Kukui'ula is one of the most significant new resort destinations to be developed on the Hawaiian islands in decades. At the height of the Great Recession, developers DMB of Scottsdale, AZ and Alexander & Baldwin of Honolulu opened a spectacular private paradise with a unique mix of amenities: a working farm, a Tom Weiskopf golf course, an experienced adventure team and a luxurious plantation-style clubhouse, cottages and bungalows. But with a sea of discounted and foreclosed housing on the island, how could Kukui'ula kindle desire for their ultra high-end product?

In 2010, Resonance was engaged to craft brand strategy, positioning and communications for Kukui'ula. With little physical product to sell, we began by telling a story that combined the attributes of the community with those of the island, crafting messages that juxtaposed high-end luxury with down-to-earth truths about Kaua'i life and family-oriented culture – messages that resonated in post-recession America. As the recovery began and Kukui'ula built new residential product, we studied owner demographics and refined positioning, messaging and media – a mix of coffee table book, brochure, web, social media and traditional media outlets – to speak to the strengths of island place, community programming and residential product. The result is a cohesive positioning and messaging that works for both sales and marketing teams.
Ireland – International Market Development Strategy

Resonance Consultancy has been selected by Fáilte Ireland, from among more than a dozen global firms, to develop a Thematic Tourism Brand Proposition and Identity for the South & East region of the country, which stretches from Carlingford to Cork.

A key focus in Failte Ireland’s Strategy Statement for the period 2010 – 2012 was destination development. The thinking then, in the face of dwindling resources, was to concentrate efforts on those destinations with strong tourism activity and viable networks of tourism enterprises, and equip them to take advantage of any upswing in international tourism. While the focus is still very much on growing international tourism whilst regaining lost ground in closer to home markets such as Great Britain, a marked change in emphasis is now beginning to emerge. Attention is now being focused on the capacity of a small number of strategic propositions to stand out in the international market place; spark the imagination of visitors; harness the support of the industry locally and realize dividends in terms of increased visitor numbers and enhanced revenue. The Wild Atlantic Way and Dublin / Dublin Plus projects are well on their way towards realizing this new ambition.

In sharp contrast to the ruggedness of the western seaboard experience, the South & East region of the country is more complex, more understated yet equally intriguing. A verdant tapestry that has been worked, reworked and layered from the earliest times, its appeal is deduced rather than declared. This assignment presents an opportunity to both understand and position the strategic significance of this area within the context of the wider destination, and to embark on a forensic examination of its characteristics, visitors, profile and market prospects at home and abroad. Critically importantly, this project is about revealing the true essence of the South & East, and communicating through a shared story its spirit of place and breadth of appeal in ways that will resonate with those customers who are most responsive to its unique value proposition.
Cincinnati USA – Destination Development Strategy

Resonance Consultancy has been selected by three tourism partners (Partners) from the Cincinnati USA market area (Cincinnati USA Convention & Visitors Bureau CCVB, Northern Kentucky Convention and Visitors Bureau NKCVB, and Regional Tourism Network RTN) to develop a tourism Growth Modeling Study for the Cincinnati USA market area.

This effort follows recent “unprecedented growth and development” that has contributed to a “stronger roster of events, attractions, restaurants and hotel and convention facilities that appeal to business and leisure travelers the world over.”

As such, the Partners are “emboldened by this success” and have sought Resonance’s assistance to “take their collaboration to new tactical and strategic levels.”

Furthermore, in examining the results of the regional Travel & Tourism Economic Impact Study commissioned by the Partners in 2012, it has become apparent at the Board and staff levels that “opportunities exist to enhance the collaboration” of the Partners, including the “creation of a 10-20 year unified strategic plan to grow the travel and tourism industry” and they are therefore using this initiative to work toward that objective.

Working in partnership with Tourism Economics, Resonance Consultancy will assist the Partners to develop a destination asset assessment; conduct an analysis of product and service gaps and opportunities; and deliver a potential growth modeling study focused principally on the visitors of the future. The results and information from this initiative will then be used by the partners to create a 10-20 year unified strategic plan to sustainably grow the travel and tourism industry.
World Travel & Tourism Council

Resonance Consultancy’s Executive Vice-President Richard Cutting-Miller was exclusively engaged by the World Travel & Tourism Council (WTTC) between 1991 and 2006 to provide a broad range of tourism policy, tourism economics, tourism forecasting and travel trends research. During his 16-year engagement with WTTC, Richard spearheaded the creation of Tourism Satellite Accounting research for 176 countries around the world working in partnership with Wharton Economics, The WEFA Group, Oxford Economics and Tourism Economics. Richard also produced dozens of country projects for the WTTC Board of Directors and various cabinet level tourism ministers and authorities around the world focused on customized tourism satellite accounts and forecasts (economic impact research), analysis and reporting of travel and tourism trends, markets and infrastructure, and analysis and recommendations of policy issues and tourism development opportunities.

As a result of Richard’s leadership, WTTC reports have been sought out by mature and developing countries, regions, states and destinations around the world for their rigorous and pioneering research, analysis and insight.

Algarve, Portugal – 1998
Argentina – 1996
Australia – 1996
Bahamas – 1995
Brazil – 1995
Brunei Darussalam – 2005
Caribbean – 2005
China, Hong Kong SAR and Macau SAR – 2002, 2005
Croatia – 1999
Hungary – 2001
India – 2002
Indonesia – 1998
Kerala, India – 2004

Malaysia – 1999
Namibia – 2004
Philippines – 1997
Puerto Rico – 2000
Romania – 2002
Russian Federation – 2005
Singapore – 1997
South Africa – 2000, 2004
State of South Carolina – 2000
Thailand – 1998
Trinidad & Tobago – 2003

Additional details and a full list of projects can be found at: www.resonanceco.com/index.html#ourExperience
Nordic Gaming owned and operated the Fort Erie Race Track which forms part of a total parcel of land comprising approximately 300 acres. Nordic Gaming was considering developing the lands contiguous to the Race Track as a year-round destination resort and residential community that would be a tourism gateway for the Province of Ontario. The concept as proposed would create the “Gateway” destination to Ontario and would complement other attractions and destinations in the Province including Niagara Falls.

The focal point of the complex was a 350,000+ square foot high-end pedestrian village lifestyle retail center, restaurants and sidewalk cafes. The pedestrian village would be anchored by a family entertainment and corporate center component featuring an internationally recognized 500-room branded hotel and 35,000 square foot conference centre, with a 100,000 square foot indoor/outdoor water park, and a spa, a 100,000 square foot dual track indoor kart racing centre with recreational entertainment, meeting and event space similar to F-1 Boston or Grand Prix New York. Other site attractions would include an upgraded race track and slots including night racing, a family racing education center, an equestrian center offering horseback riding and riding tours of the Niagara Peninsula and Wine Country, a Wine Pavilion and big box golf store. These facilities would be complemented with a 2200-home residential community.

We developed the overall master plan concept. In addition, we assisted in negotiations with various government agencies to obtain financial assistance for the project. We conducted detailed feasibility studies for each of the components: retail, hotel, water park, conference center and spa, food and beverage establishments and indoor karting center. The studies included a comprehensive analysis of the greater Toronto area, Golden Horseshoe, the Niagara Region, Niagara Falls, N.Y., Buffalo, western N.Y., Michigan, Pennsylvania and Ohio, a detailed analysis of supply and demand, an analysis of comparable destinations, concept development and recommendations and detailed financial analysis. We worked with the project architects on designing the overall land use layout and assisted in negotiations with various levels of government (Provincial and Municipal) to obtain financial support for the project. We also identified prospective hotel operators and negotiated a letter of intent for the hotel operations and prospective operators for the lifestyle retail component as well as the indoor karting facilities.
The Wanda Group is in the process of developing a new major year-round destination resort in northeastern China. The resort will be a “greenfield” development and includes a pedestrian village (similar to Whistler and Mt. Tremblant), a new ski mountain, two world-class golf courses designed by Robert Trent Jones Jr. and Jack Nicklaus, six hotels, restaurants and a retail component. The project is being designed to create a new tourism destination in China that will cater primarily to the domestic market and to a lesser extent the Korean market.

In conjunction with our office in Beijing, we conducted the master feasibility study for the hotel components, which included internationally branded properties ranging from full-service luxury hotels to mid-market select service hotels. Our study examined the demand for skiing and outdoor recreation activity in China, included a comparables analysis of major North American destination resorts with a focus on their key success factors, developed concepts for the pedestrian village and the overall master plan, a detailed supply and demand analysis, recommendations of the size and type of facilities most suited to the market and a financial analysis for each of the individual hotels.

As an additional step, we organized a “learning tour” of major North American destination resorts for Wanda. This included comprehensive site visits to three major resorts, in-depth meetings with management of the resorts and destinations to gain an understanding of their initial planning and development stages, transition and maturity into world-class destinations, critical success factors and impediments to growth, competitive challenges, target markets and growth strategies.
Over the years, we have conducted numerous feasibility studies and hotel valuations for the Niagara 21st Group and its predecessor company, including such projects as the Marriott Fallsview, Sheraton Fallsview, Embassy Suites and Courtyard by Marriott. Recently, the Niagara 21st Group was considering expanding its Marriott Courtyard and adding an additional hotel on the site. The concept was to create a Marriott Village with two or three different Marriott branded hotels and that would offer a variety of common services.

We were retained to conduct a feasibility study for the various hotel components which included a detailed market overview of the Niagara Region, analysis of demand drivers, examination of the competitive supply including a SWOT analysis and to make recommendations as to the sized and type of hotels best suited to meet the demands of the Niagara Falls market. The study also included a detailed financial model reflecting the incremental revenues and profits that would be generated by creating a Marriott Village and diversifying the concepts.
Located on a 27-acre site, the Sherman Campus represents a rebirth and refurbishment of a landmark establishment. Creating a junction of “humanity, theatre, music, art, health and wellness,” the Sherman Campus will represent the intersection of hope, opportunity, services and concern for all members of the Jewish community. The campus will include a new Jewish Museum of Canada, a Holocaust Education Center, a community center and a Jewish Walk of Fame, a series of indoor paths and bridges connecting these remarkable facilities to one another and to the community they serve.

We were initially retained to conduct the feasibility study for a new, state-of-the-art Celebration Center that would include conference and banquet facilities and restaurants. One of the underlying objectives of UJA Federation was that the campus be open to the community at large and offer kosher food services.

Our study examined the size of Jewish community in Toronto, profiled competitive venues, identified comparable centers throughout North America and examined their offerings looking at best practices, defined the competitive supply, estimated potential market demand, made recommendations of the type of foodservices and concepts including a conference center, banquet facilities, multi-purpose venue and restaurants and cafes and provided a detailed financial analysis for all components.
Graywood Group, one of Toronto’s most prominent developers, is developing the first full-service five-star hotel in Canada’s financial capital. Located on a site in downtown Toronto’s entertainment district, this project will be an icon for the city. Situated between two parkettes, the Ritz Carlton will be incorporated as part of a new 53-storey luxury condominium and hotel complex comprising approximately 766,000 square feet. The project includes 267 rooms (on the first 20 floors) and 153 condominium residences above the proposed hotel. The hotel will include a fine dining restaurant and lounge, a ballroom and meeting facilities and a 21,000 square foot full-service spa and salon with pool and fitness facilities.

We were retained to conduct the initial feasibility study and business valuation for this hotel to assist with the underwriting. Our study provided a detailed market overview, supply and demand analysis, recommendations of facilities and amenities and financial analysis.
The King West area of downtown Toronto is an emerging neighborhood with an eclectic mix of retail, restaurants and high-end condominium residences. The developer Peter Freed had a vision to bring a luxury branded hotel to the area as an anchor to revitalize and energize the neighborhood. We were retained to identify potential hotel brands and to negotiate a long-term hotel management agreement. In addition, we were retained to conduct the feasibility study for this project which included a detailed market analysis. Since the hotel is located outside of the traditional financial and entertainment core of the city, we conducted extensive interviews with stakeholders in the neighborhood and potential business clients in the advertising, technology and services areas that would be the most likely clientele for the hotel. Our study also included a detailed analysis of the North American boutique hotel market, critical success factors and a micro competitive market analysis. Based on this analysis, we recommended the facilities and amenities for the hotel and prepared the financial model for underwriting.

The hotel opened in late spring 2010 and includes 102 guest rooms, 3 restaurants, an indoor-outdoor roof-top lounge with swimming pool, meeting and conference facilities, a theater and a night club.
Calgary Centre City Plan

As Calgary’s Manager of Centre City Planning + Design, Brent Toderian reorganized the formerly disconnected downtown work program, into the Centre City “Family of Plans” (a term and scale of planning he conceived). Until then, downtown planning was broken into area + issue specific plans and guidelines, a literal “stack of plans and policies”, and the Downtown, Mid-town and Beltline areas had never been planned as a coherent whole.

As initial project manager for the new Centre City Plan, Brent took an unusually holistic, multi-disciplinary and comprehensive approach. Under the three themes of the “Livable, Thriving and Caring Centre City,” Brent envisioned a plan that would be visionary, bold and ultimately action-oriented, measurable and monitored.

The ‘Family’ guided by the Centre City Plan would ultimately include the East Village and Beltline Area Redevelopment Plans, the Mid-Town and 17th Avenue Urban Design Strategies, and the more detailed Centre City Social, Transportation, and Open Space Plans. All plans were coordinated and communicated by Brent in a legible and coherent way.

The Centre City Plan would prove to be highly effective and transformative, with significant profile and buy-in across the community. Furthermore, it included an effective monitoring system through report-cards and regular Centre City Symposia. The Plan received numerous awards, including the Canadian Institute of Planners Award of Planning Excellence, the AACIP Award of Planning Excellence, and a Mayors Urban Design Award.

**Project Information**

Location: Calgary  
Year: 2004-2007  
Employer: City of Calgary  
Awards: Many
Cambie Corridor Plan

After inheriting a work program that envisioned a series of four individual station area plans (that would take 8 years) along the then-under construction Canada Line subway, Brent Toderian reconceived the exercise as a true urban transit corridor that would also emphasize complete, mixed-use communities for walking, biking, and transit. Renaming the exercise the Cambie Corridor Plan, Brent steered the project team toward a next-generation transit-oriented development that used advanced modelling to assess the success of alternative building forms against ridership, energy performance, and affordability/cost success-levels. Highly informative visuals were produce to convey intended built forms. Energy was utilized as a new third component in the form-making relationship between land-use and transportation/mobility.

Breaking the assumption that in Vancouver density comes in the form of tall towers, the Cambie Corridor Plan calls for predominantly mid-rise forms along most of the corridor, with individual station area heights and densities influenced by the defined ‘neighbourhood characteristics’. In this way, the Corridor still reflects the “city of neighbourhoods” tradition in Vancouver planning.

The Cambie Corridor Plan has received high praise and a growing number of awards from North American urbanists, as a new ‘best practice’ for transit-oriented corridor design and planning, and for integrating energy into the process as an overt form-shaper.

Project Information
Location: Vancouver
Year: 2010-2011
Employer: City of Vancouver
Awards: CIP + PIBC Awards of Excellence
Ecodensity

In 2006, Vancouver Mayor Sam Sullivan introduced the term EcoDensity to the city, region, and world. From that point on, it was Brent Toderian’s task to define the term, convene a challenging but healthy city-wide public dialogue about strategic, green densification across every neighbourhood, and eventually develop a Charter and Action Plan that would make it a reality.

In 2008, after three drafts, hundreds of meetings, huge public discussion and media around what “density done well” could mean in many contexts across the downtown and city, and 7 nights of public hearings before Council, Vancouver City Council unanimously approved EcoDensity. This unanimous approval under challenging circumstances (including a highly politicized situation where the two political parties that didn’t coin the term, were initially invested in the initiative’s failure) was largely credited to the strategy, approach, credibility and innovative content executed by Brent Toderian as hands-on leader with a talented staff team.

EcoDensity has transformed planning and design in Vancouver, through the Charter policies and priorities around smart, strategic densification (i.e. along transit, in centres and along corridors); “gentle, hidden and invisible density” in the former single-detached neighbourhoods (including over 500 laneway houses already approved); the first LEED Gold and District Energy policies for private developments in North America; removal of barriers to green design; and many other actions and initiatives. EcoDensity has become a globally known and studied initiative, transforming density debates regionally, and won the Canadian Institute of Planners Excellence in Planning Award in 2009.

Project Information
Location: Vancouver
Year: 2008
Employer: City of Vancouver
Awards: CIP Excellence in Planning Award
TECHNICAL APPROACH AND PROPOSED PROCESS
The Travel & Tourism industry has undergone a period of extreme change over the past 10 years. Travelers’ motivations and financial circumstances have shifted, leaving many destinations that were well positioned just a decade ago adrift in the current economic environment. At the same time, this market dislocation is creating opportunities for new tourism destinations and products to satisfy the needs and desires of both today’s and tomorrow’s anticipated travelers. Correctly identifying and understanding these aspirations and needs, and developing a corresponding Destination Master Plan that will resonate with both today's and tomorrow's anticipated travelers, will help San Diego reach its goal of realizing tourism's full economic potential.

Our approach to the creation of a Destination Master Plan is designed to help stakeholders articulate and share a clear vision for the future—because when people share a vision of the future, it gives them shared belief, shared purpose and shared passion. Our approach seeks to define a destination as more than the sum of its parts. While the Destination Master Plan will address critical hardware—such as transportation and attractions—that is required to achieve San Diego’s goals, it will also address the software of relationships and programming required to foster the culture and experiences necessary to create a unique and compelling sense of place. Our experience has taught us that successful destination master planning requires the participation and alignment of not only industry stakeholders, but those of both the visitor and your local community as well. As such, our approach is designed to not only consult, but also engage and collaborate with your tourism industry stakeholders, visitors and community.
Our approach is also designed to:

• Provide a rigorous set of research activities and efforts necessary to deliver a comprehensive Destination Master Plan to guide San Diego for the years ahead.

• Create a public and transparent operational approach and communications* process to the project so all interested parties can see the activities taking place, monitor project status and be assured that deliverables are on target.

• Create an “apolitical” project environment with an independent and unbiased approach to the issues at hand to help assure that all stakeholders, including the San Diego Tourism Marketing District Corporation, partner stakeholders and organizations, receive the best recommendations and advice possible.

• Create several methods of input and collaboration with stakeholders from all interested groups, so there is ample opportunity to contribute wide-ranging and diverse opinions to the project.

• Work closely with the San Diego Tourism Marketing District Corporation to formulate, draft and finalize Destination Master Plan conclusions and recommendations.

Our process will help you identify, innovate, create and articulate unique products, amenities, programming and experiences – along with the policies and protocols required – to guide the long-term planning and design of San Diego as an important tourism destination.

The Destination Master Plan will:

• Create consensus among your stakeholders of the trends impacting your industry and the threats and opportunities they represent;

• Assess and define the product development needs of San Diego, its tourist attractions, services, facilities and transportation;

• Identify growth and expansion opportunities for San Diego's tourism industry with respect to market realities;

• Identify tourism industry actions and activities that can benefit the local economy and social well being;

• Provide policies to inform and direct planning and development in a manner that supports tourism development goals and objectives;

• Be used as a management tool to prioritize the use of resources to achieve general and specific goals established through the process; and

• Be used as an information resource in conducting individual agency, business or organization planning processes and operations.
World Class Research

No Destination Master Plan is complete without world-class research. Economic research, market research, travel trends research, competitive research and consumer research, coupled with stakeholder engagement, focus groups and one-on-one interviews are just a few of the areas of expertise we provide for our clients when helping them to develop tourism development strategies and plans.

Our research and analyses drill into habits and mindsets and we analyze trends and data to uncover new opportunities. Then, in consultations with you and your team, we study the information we’ve gathered and its implications for your destination. We look at your world through a lens of possibility to build visions of what the future could be like, and chart strategies to get you there.

The Resonance Consultancy approach to carrying out the activities associated with this project is divided two ways – between primary research to facilitate and collect extensive stakeholder input:

- Conducting intensive and extensive one-on-one interviews;
- Facilitating focus groups / workshops / product development sessions; and
- Producing comprehensive online stakeholder and community engagement for “massive collaboration.”

...and secondary research and analysis focused on:

- Market analysis;
- Trend analysis & customer profiling;
- Lodging demand analysis and forecasting;
- Tourism assessment mapping;
- Protocol analysis; and
- Event gap analysis.

We find that this combination of primary and secondary research approach allows us to understand both the qualitative and quantitative sides of the destination’s issues in the most productive and cost effective manner for our clients.
**Project Steering Committee**

It is not unusual for Resonance Consultancy to work with and for a project steering committee or multiple stakeholder groups in its tourism consulting work.

For example, the Vancouver Tourism Master Plan recently completed by Resonance was partnered by three organizations: Tourism Vancouver, the City of Vancouver and Vancouver Economic Commission (VEC).

- Tourism Vancouver – As the authorized official Destination Marketing Organization for Vancouver, Tourism Vancouver leads the effort the bring visitors to the city.
- The City of Vancouver – Has also been an active partner in the development of the Tourism Master Plan, contributing expertise, advice and resources to all aspects of its development.
- Vancouver Economic Commission – Works to strengthen the city’s economic future by helping existing businesses, attracting investment, researching the business environment and making policy recommendations.

For this project, the Tourism Master Plan partners created a steering committee that monitored and managed the process and provided feedback to Resonance on the research, conclusions and recommendations.

In the development of the project, Resonance was thoroughly engaged with the project steering committee to review and agree to the project output, but was also required by extension to gain the buy-in, support and signoff of the Tourism Vancouver Board of Directors, the City of Vancouver’s Senior Management Team, City Manager and Mayor, as well as the Senior Management of the Vancouver Economic Commission.

To illustrate Resonance’s success with this large collection of stakeholders, the Master Plan was official launched by the Mayor of Vancouver – who also represented VEC – and the Chairman of Vancouver Tourism at the Annual General Meeting of Vancouver Tourism. The launch was a major public event and made front-page news.

In projects like the Vancouver Tourism Master Plan or this San Diego Destination Master Plan, where issues and opportunities are likely to involve a broad and diverse collection of stakeholder groups, public and private sectors organizations, as well as visitor markets and resident populations, we are convinced that engaging with a multi-faceted project steering committee is critical for success.

**Project Management**

In recognition of the importance of adhering to the timetable for the work, the necessity to coordinate a range of activities and tasks over a set period of time – and the need to maintain close liaison with the client and good relations with the key stakeholders – we have built specific provisions into this proposal to ensure the effective and efficient delivery of the assignment. This project management activity will also ensure the necessary consistency between all of the outputs both in terms of the reports themselves as well as their timely production in line with the proposed program of activities.

A core element of our project management approach will be the establishment of a Project Initiation Document (PID) at the outset of the assignment. This is a standard feature of our approach and is used as a basis for agreeing on / refining with you how we will approach the study. The primary benefit of this
document is that it provides an opportunity to ensure that from the outset the assignment is undertaken in a controlled and efficient manner. Briefly, the PID helps ensure that:

- The detailed scope of the study and overall methodology is understood and agreed by all parties from commencement;
- Arrangements for governance of the study, including decision-taking is clearly defined and understood by all;
- Timetables for completion of the study are established and monitored throughout the engagement to enable that corrective action is taken if individual tasks fall behind plan; and
- It enables risks to the project delivery being identified early, assessed and arrangements put in place to manage them.

Our general approach to project management encompasses a number of other distinct aspects, as follows:

- Open, honest and regular communication with the client team and the stakeholders. This approach offers the best potential for securing consensus between all the parties to the assignment. Regular communication is critical to ensuring that emerging findings are understood by the relevant stakeholders and the client team, and that any emerging outputs meet with everyone’s expectations.
- Our approach will also involve regular reporting on project progress throughout the study. Resonance Consultancy utilizes the Cloud-based Daylight time-tracking and reporting system ensuring that weekly project status reports are available; these detail the work incurred by each team member on a daily basis.
- Resonance Consultancy utilizes the GoTo Meeting platform, which enables screen sharing and participant video conferencing to enable regular virtual meetings with participants in a range of geographic locations.

More specifically:

- At a strategic level, this will involve a weekly update on progress against the Project Initiation Document;
- At an operational level, we will provide regular updates on progress against the project activities;
- At a client team level, we envisage having a series of short and timely meetings to initially discuss and agree on our approach to the study and subsequently to facilitate the feeding back of outputs and results; and
- Our project manager Tyler Smith will be the key contact on a day-to-day basis to ensure that the Client Team and stakeholders are always provided with a central point of contact. Tyler has extensive experience in managing projects of this nature and will bring his recent experience of successfully project managing the Vancouver Tourism Master Plan to bear on this assignment.

These mechanisms should ensure that updates are provided promptly on project progress, a two-way exchange of views on a regular basis is facilitated and the required timescale is met. We are flexible in our approach to the nature and format of this assignment and fully appreciate the complexities involved. Therefore, our approach will be fluid and responsive to the emerging requirements that arise throughout the process.

There will be a checkpoint review at the end of each stage of our methodology, at which point the team will meet to discuss process and issues arising.
Quality Assurance

As an international leader in tourism development consulting, Resonance Consultancy takes seriously its obligation to maintain high professional standards. We are committed to the achievement of excellence and have developed a Quality Assurance Plan to support attainment of our, and our clients’, quality objectives. Project-specific instructions and procedures will be developed in accordance with the scope of work at the outset of the project.

While all levels of our staff are actively involved in and responsible for monitoring and assessing quality, Resonance Consultancy employs a dedicated project co-ordinator (Tyler Smith) to track, monitor and manage its consulting work. All work created by the Project Team is reviewed and verified by the project co-ordinator while company principals are charged with the continued assessment of the Quality Assurance Plan and the consistent implementation of project-specific procedures designed to reach Resonance Consultancy’s and our clients’ quality goals.

Principals contributing to a report will review and edit his/her own work before submitting it to a second Principal who will review and verify its accuracy and quality.

Reviews of reports with multiple authors/consultants differs from that for single author reports primarily by the fact that the Principal assigned to lead a particular stage of the project assembles the report from individual contributions and he/she, therefore, is responsible for formatting and assembly of the First Draft.

The First Draft will then be reviewed and edited by the Project Manager for the project. At the discretion of Resonance’s Project Co-ordinator, a senior staff member other than the Project Manager may be designated to review the First Draft and produce the Second Draft.

Review of the Second Draft and production of the final draft (Third Draft) remains as above.

Copies of controlled documents (current and superseded), project records (voided and revised), and report manuscripts (final, draft, and edited hard copies) will be retained at Resonance Consultancy’s Vancouver office as quality documents.
Based on the RFP’s Scope of Services, Resonance Consultancy proposes a work plan divided into:

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### 1. Kick-off

The “Kick-off” will take place onsite at SDTMD offices and will include:

- Introductions, orientation and project Kick-off between Resonance Consultancy, Horwath HTL, SDTMD staff and key stakeholders.
- Development and agreement of the Destination Master Plan goals and objectives from which the project can build.
- Collection of all secondary research recommended and available from the SDTMD and other appropriate sources.
- Detailed project planning between Resonance Consultancy’s Project Team and SDTMD staff to coordinate the “Stakeholder Engagement” and “Opportunities Development” phases.
Secondary Research

The first stage in the SDTMD Master Plan includes a survey of publicly available secondary research to identify and categorize the universe of opportunities and issues that may be impacting tourism industry business in San Diego now or could do so in the future.

These opportunities and issues will be documented and presented to establish a foundation and discussion guide for the Stakeholder Engagement phase of the Tourism Master Planning process. Although it is not yet know what these issues might be for San Diego, in Vancouver this exercise identified the following opportunities and issues:

Vancouver Opportunities:

- Aboriginal Tourism
- Chinatown
- Commercial Drive
- Culture
- Digital Media, Film & Television Production and Tourism
- Downtown Eastside
- Events
- Gastown
- Georgia and Dunsmuir Viaducts / Eastern Core
- Hastings Park PNE
- Mountain Biking
- Plaza of Nations
- Sports
- Transportation – Bike Share
- Vancouver Art Gallery

Vancouver Issues:

- Aviation – Strategy, Rules, Regulations, Policies & Fees
- Aviation – YVR and BC Airports
- Border Control
- Canadian Dollar
- Canadian Tourism Industry Deficit
- Cruise Ships
- Excitement
- Family Friendly
- Gaming
- Government Relations and Communications
METHODOLOGY

2. Stakeholder Engagement

Identifying key issues and opportunities with respect to developing San Diego tourism, communicating with stakeholders and residents about the project and engaging stakeholders and residents to assist in prioritizing recommendations.

In decades of tourism consulting work, we've learned that incorporating knowledgeable stakeholder input into the Destination Master Plan is considered fundamental and critical to the project. As such, strategic tourism industry consultation has been built into the project work plan.

This is also an opportunity to enlist important industry stakeholders into the discussion about destination strengths, weaknesses, opportunities and threats. As such, engagement also helps to build ownership of the results and recommendations of the study. It also ensures that the project team is able to effectively combine its broad international and national knowledge base and expertise with up-to-date local context, ideas and insights to ensure that important issues are not overlooked and selected opportunities are realistic.

To begin this activity, we will conduct a stakeholder analysis to identify and investigate the Force Field formed by any group or individual who can affect or is affected by this initiative. We will begin with a broad definition of the term stakeholder: it will include those who have an interest or a stake in the project; those who are likely to be affected by the project, those who may influence the project’s outcomes; and the beneficiaries of the project. While it must be acknowledged that the purpose of engagement may change over the life of the project, the identification and selection of stakeholders is an important consideration as it will guide the choices concerning who should be involved, how participation is organized, how ideas are taken on board and how a coalition of support around the Master Plan can be built.

In undertaking this stakeholder mapping, we will use a participation planning matrix – a technique that acknowledges the notion of a spectrum of levels of participation and ranks the significance of consultees accordingly. The levels of participation range from a minimum of simply obtaining information from and informing stakeholders through to consulting, involving, collaborating and co-creating with others.

VIP Interviews

Strategic informational inputs for the Destination Master Plan will be gathered through a series of one-on-one discussions – what we are terming VIP Interviews – to ensure that important opinions are canvassed, concerns raised are responded to, and potential sources for the purposes of research are identified.

Approximately forty (40) one-on-one sessions will be conducted with VIPs identified in the stakeholder analysis and compiled from lists provided by the SDTMD. VIPs usually include Board Members, key industry association heads, private sector CEOs and public sector agency heads and office holders (city managers and mayors). The planning, organization and conduct of one-on-one sessions will be coordinated with SDTMD.
**Community Communications**

As part two of Stakeholder Engagement, we recommend the development and publication of a San Diego Tourism Marketing District Destination Master Plan website (SanDiegoDestinationMasterPlan.org) to communicate the destination master plan process, activities and results open to all industry stakeholders and community residents.

This online portal will serve as a centralized point of information on the project with News, Background, Insights and the Destination Master Plan. The website will also provide for input, comments and contacting the project team.

Resonance will work with the SDTMD communications team to draft and publish regular blog entries to highlight project activities and milestones to keep the stakeholders, registered users and community informed.

Community Communications will also include a high-production value video for use on the project website, YouTube channels and other social media platforms. The video will serve to introduce the Destination Master Plan project, including the benefits that the project is expected to achieve, the activities that will take place, and the timeframe for the work as well as solicit and engage the community in the process by asking them to provide feedback and comments to specific issues and opportunities.

**3. Market Analysis**

*Identifying who the current market is, how it might change in the future and potential opportunities to grow San Diego’s market share.*

This activity is focused on an analysis of existing customer data and source markets to profile current audience composition with demographic projections by source market and trends analysis to understand how those audiences and their aspirations might change in the future.

Drawing on a wide range of data sources, we will analyze and report a detailed description of the existing tourism marketplace for San Diego’s tourism products and services, and the implications for future development and hotel demand. This includes, but is not limited to:

- Visitation volumes and growth
- Visitor market origins
- Visitor travel patterns
- Air passenger traffic
- Key attractions visitation
- City-wide convention demand
- Demographics including population growth, households, income, employment, labor market
- Economic activity including commercial office, industrial, retail and residential development
- Primary trip purposes and visitor activities
- Seasonality patterns
• Types of accommodations used
• Expenditure impacts

The focus of this activity will be to:

• Obtain relevant data on existing market segments (i.e., current visitors to San Diego in the corporate, group and leisure segments and geographic origin);
• To identify opportunities to attract new visitors from segments or emerging and geographic markets not currently coming to San Diego; and
• Develop a profile of the typical visitor segments utilizing hotel accommodation in San Diego and their market mix.

Special attention will be paid to new high potential visitor markets including but not limited to China.

Focus Groups

Next, Resonance will conduct a series of consumer and MICE oriented focus group sessions in key feeder markets, in coordination with the San Diego Tourism Authority in up to five key feeder markets such as Los Angeles, Phoenix, San Francisco, Denver and Las Vegas. These focus group sessions will focus on product development topics / issues such as:

• Tourist attractions and services
• Hotels and accommodations
• Restaurants and retail
• Tourist events, activities and programming
• Tourist icons
• Transportation and infrastructure
• Meetings and convention facilities

To increase the level of “consumer experience” and productivity of the discussions, the focus group participants will be selected from a list of well-established tour operators, allowing us to reach deeper into the collective buyers’ decision making process and understand how San Diego compares to other tourism and resort destinations.

Coincident with the consumer-oriented panels, Resonance will also hold a series of focus groups with meeting planners who do regular business in San Diego and other competing destinations to understand their perspective on San Diego as a MICE destination.

Consumer Analysis and Survey* (Provisional Activity)

The project team will review and analyze all consumer research on the San Diego brand and the visitor profile available from SDTMD to assess consumer perceptions of San Diego tourism products and services.
METHODOLOGY

In the event that the secondary data (visitor research) available from SDTMD and its partners is not sufficient to properly assess the quality of the San Diego tourism experience received by recent visitors and provide comparisons vis-à-vis its competitive set, Resonance will create and distribute an online survey to recent San Diego visitors in key feeder markets to understand their assessment of tourism products, activities, festivals and events and how these compare with alternative and competing destinations.

The rationale for this direct survey is to deliver quantitative measures by real time experts (consumers) to a question that is usually not oriented to quantification – product assessment and competitive standing. These results will then be used to identify the gaps and opportunities, from a consumer perspective, on the destination asset side for consideration during the product development workshops.

This survey will allow for a straight-forward comparison of destination assets (infrastructure, products, services, events, etc.) in the same way that a leisure visitor would compare and contrast their choices, in order to select a destination for pleasure, vacation or holiday travel.

The survey will be designed to:

- Assess the quality of tourism infrastructure in the San Diego market area relative national and international standards for infrastructure, wayfinding, and tourist information services, etc.
- Understand the accommodations and attractions offerings, as well as product quality levels relative to current marketplace expectations.
- Assess the destination’s events, festivals and activities
- Assess the quality of restaurants and food service facilities of various types.
- Assess the types and quality of marketing activities and promotional efforts used by San Diego DMOs.
- Understand San Diego’s primary competition for leisure business and how it compares and contrasts to those destinations and their offerings.

In the event that it is necessary to activate this “provisional” activity, we ask that the SDTMD staff organize and facilitate the email lists of past visitors, so we can focus our efforts on survey development, data collection and analysis.

This provisional activity is itemized separately in the project budget with the amount excluded if the activity is not necessary.

Trend Analysis & Customer Profiling

We will examine and report on a wide range of consumer trends and their implications for San Diego in order to create prospective profiles of the visitor of the future. In addition, Resonance will share its own proprietary research and data on the U.S. market with the SDTMD team. Since 2008, Resonance President and Futurist Chris Fair has led a biennial study of affluent U.S. households (income $150k+) in partnership with the Luxury Institute to better understand the preferences, habits and aspirations of affluent travelers who are responsible for more than 30% of all U.S. travel spending. In 2014, Resonance has expanded its consumer research and launched national U.S. studies on Millennial Travel & Tourism.
Trends and Senior Travel & Tourism Trends. The research, data and national Millennial, Senior, and Affluent traveller consumer intelligence developed by Resonance will be made available to the SDTMD team as part of this project.

Trends we anticipate covering as part of this research include, but are not limited to:

- International, national, state and local tourism growth and trends
- Changing demographics
- Impacts of technology
- Accommodations preferences and quality expectations
- Packaging and marketing
- Cultural / heritage tourism
- Auto and motorcoach tours
- Vacation / second home tourism
- Meetings, conventions and group travel
- Adventure travel / ecotourism / outdoor recreation
- Spa and wellness tourism

Future “needs” we anticipate covering as part of this research include, but are not limited to:

- Meeting and convention, as well as the planned expansion of the San Diego Convention Center
- Retail and culinary
- Visitor experience and nightlife
- Medical tourism
- Tech-industry such as biomedical and clean-tech
- Research institutions and universities such as UCSD

**Hotel Supply and Demand Analysis**

Resonance’s project partners, Horwath HTL, will lead this exercise to analyze and forecast San Diego’s hotel supply and demand.

**Hotel Supply Analysis**

- Identify the existing hotel supply in San Diego and stratify by:
  - Market tier (e.g., luxury, upper upscale, upscale, upper midscale, midscale economy, convention, conference centers, resorts, B & B’s, Air bnb, etc.);
  - By brand;
  - Independent; and
  - Boutique.
- Determine the size (i.e., number of rooms, facilities and amenities).
METHODOLOGY

• Identify hotels under construction, in the final planning phase (where construction will begin in the next 12 months) and those in the planning or rumored stage (we will verify the existence of these projects through the local planning department, chain feeds or other verifiable sources).
• Conduct a physical examination of the primary hotels / resorts in the San Diego market to gain an appreciation of their location, attractiveness, quality of facilities and amenities.
• Determine product gaps that currently exist and that will exist through 2025.
• Recommend opportunities for the type(s) of accommodation facilities most suited to fill those gaps (this will be tied to the hotel demand analysis to determine if there is sufficient demand now and for the foreseeable future to support new accommodation facilities).

Hotel Demand Analysis

• Conduct interviews with designated hoteliers and the hotel association, to gain insight into market trends, pricing strategies, marketing strategies, relationships with other industry sectors (e.g., convention center, SD Tourism Marketing District, attractions, sporting events, etc.) to understand the dynamics of marketing San Diego as a destination and the area’s hotels.
• Obtain demand data through interviews with hoteliers, and from independent third-party sources such as STR (Smith Travel Research) who track supply, demand, occupancy, average rate and revenue data for the hotel industry globally.
• Stratify demand data by market segment (e.g., corporate, group, leisure and other segments as appropriate).
• Project occupancy, average rate and RevPar, for the competitive market for a ten-year horizon, based on prevailing and forecasted economic trends impacting supply and demand in the competitive market area.
• Analyse historical performance.
• Based on the future needs analysis, determine potential hotel demand (room nights) by year through 2025 from:
  • Meetings and conventions, as well as the planned expansion of the San Diego Convention Center;
  • Retail and culinary opportunities;
  • Visitor experience and nightlife;
  • Medical tourism;
  • Tech-industry such as biomedical and clean-tech; and
  • Research institutions and universities such as UCSD.
• Determine the number, size and type of accommodation facilities best suited to meet future demand and fill the gaps in San Diego’s accommodation supply.
• Project occupancy, average rate and Revenue for the accommodation sector through 2025.
• Project transient occupancy tax (TOT) for the city of San Diego through 2025 (with subsequent continued growth).
• Investigate opportunities to increase TOT through the addition of new accommodation sources (e.g., Air bnb; VROB; other transient accommodation sources).
4. Competitive Analysis

Identifying the quality of the current San Diego tourism experience and how it compares to other cities.

Reviewing and benchmarking of San Diego tourism assets, products, hotel supply and services versus its competitive set to identify areas of competitive advantage and gaps that need to be developed to attract target audiences.

Tourism Assessment Mapping & Benchmarking

Assessing and mapping the existing tourism infrastructure, product and services in the San Diego market area and comparing these results to alternative / competing destinations is an important step in developing the Destination Master Plan. It is most important that this supply-side analysis and mapping be based on extensive first-hand familiarity with the tourism infrastructure, products and services in the San Diego market area and alternative destination choices.

In this case, Resonance will utilize its proprietary Destination Analytics research that focuses on a destination’s supply side portfolio to quantify and map “quality tourism products and experiences.”

This approach and methodology is the result of extensive work by Resonance Consultancy over the past few years to undertake Destination Assessments and Tourism Development Plans for a wide range of places. The more we researched, the more we began to understand that traditional measures of success – numbers of visitors and the spending they generate – don’t tell Destination Marketing and Management Organizations the whole story.

Instead, in an age where traditional marketing is less and less influential, the Resonance team is more interested in the way visitors themselves are influencing tourism through their experiences and evaluations of destinations – the comments, images and reviews from family, friends, and associates.

For this work, we consider destinations from both a business and a leisure perspective, so we chose key criteria for each that influence demand for both business and leisure travelers. For business, the four criteria were: number of direct flights; number of Fortune 500 headquarters; places to stay (hotels); size of convention center and exhibit space.

On the leisure side, we count and map quality tourism products and experiences. Twelve factors come into play from several sources, including two of the most important review sites in the world, Trip Advisor and Yelp. Trip Advisor informs the rankings for Outdoor Activities and Parks, Attractions and Amusements, Food Experience, Museums and Fine Arts and Culture and Performing Arts. From Yelp, we draw Shopping, Places to Eat and Drink and Nightlife. In our analysis of millions of traveler reviews, we consider only entries rated as very good or excellent to ensure the results speak not just to the quantity of products on offer, but the quantity of quality experiences as rated by visitors themselves.
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The Resonance destination analytics includes measures on:

- Number of cities with direct regularly scheduled commercial flights
- Number of Fortune 500 corporate headquarters
- Size of convention center
- Number of very good or excellent traveller recommended hotels
- Number of very good or excellent traveller recommended outdoor parks and activities
- Number of very good or excellent traveller recommended amusements
- Number of very good or excellent traveller recommended food experiences
- Number of very good or excellent traveller recommended performances
- Number of very good or excellent traveller recommended culture & landmarks
- Number of very good or excellent traveller recommended museums
- Number of very good or excellent traveller recommended nightlife
- Number of very good or excellent traveller recommended restaurants
- Number of very good or excellent traveller recommended shopping
- Number of major league sports teams
- Crime rates

For this exercise, the geography covered for product assessment and mapping is expected to include:

- The Big Bay
- The Gaslamp
- Little Italy
- Bankers Hill
- Hillcrest
- Balboa Park
- Point Loma
- Mission Bay
- Mission Valley
- La Jolla
- Interstate 15 Corridor (Rancho Bernardo)

Gaps Analysis

Following the tourism asset mapping and analysis for San Diego, Resonance will align this information against similar tourism asset analyses for the competitive set, selecting up to 20 destinations from Resonance’s database of 130 U.S. cities and up to 5 international destinations, to document and illustrate those areas of tourism product that are leading or falling behind.
The competitive set for benchmarking and gaps analysis purposes is expected to include:

- **Tourism destinations** – Hawaii, Orlando and Anaheim / Orange County. Additionally, Resonance recommends that this group include other worldclass destinations such as Miami, Las Vegas, Vancouver, Montreal and New York in North America and Hong Kong, Singapore, Sydney, Paris, London and Rome abroad.

- **Meetings / convention destinations** – Chicago, Las Vegas, Los Angeles, San Francisco, Orlando and Anaheim. Additionally, Resonance recommends that this group also include: Washington DC, Boston, Denver, Vancouver, Seattle and Toronto.

To provide greater detail and results from any of these destinations, Resonance is prepared to visit with the local tourism and meetings / convention leaders and government officials for in-depth interviews, conversations, data gathering and analysis. These onsite visits would be charged on the basis of time involved and travel expenses incurred.

Using these criteria as guidelines, this analysis will look at the current situation, gaps that exist in the market, opportunities, lessons learned from past experiences, and offer suggestions on acquiring or developing gap or anchor events. The analysis will then offer further suggestions for an approach to fill San Diego’s yearly calendar.

**SWOT Analysis**

Upon completion of the Competitive Analysis, Resonance will prepare a SWOT Analysis report that summarizes the Strengths, Weaknesses, Opportunities and Threats for San Diego tourism.

This SWOT report is presented to establish a foundation and discussion guide for the Opportunities Analysis phase of the project.

In addition to the comprehensive SWOT Analysis, Resonance will also provide breakout detail for market sector specific sets such as the “Resorts”, “Meetings & Groups” and “Transient Leisure”.

In this way, each sector’s strengths, weaknesses, opportunities and threats can be highlighted so that they priorities for each and the organizations and activities that focus on and serve the sector do not get lost in the shuffle.

**5. Opportunities Development**

*Identifying product development opportunities to improve and enhance the San Diego tourism experience.*

**Protocol Development**

Independent of the Situational Analysis, but in keeping with a best practice examination, Resonance will review and assess the group of organizations, tasked with marketing and selling the City of San Diego, including but not limited to San Diego Tourism Authority, the San Diego Convention Center Corporation, the Port of San Diego, and the San Diego Sports Commission. This exercise will review their missions,
strategies and operations to discover, document and address any organizational overlaps / redundancies which are unproductive or detrimental to the broader San Diego tourism industry. More importantly, it will identify those sales and marketing activities where the return on investment is greatest among the organizations and champion their success, further development and potential for growth.

**Event Development**

Generally speaking, there already are a generous number and range of events in San Diego reflecting the diversity, interests and demographics of the city. Many events are neighborhood or community based, and in many cases, showcase the cultural or ethnic component of those communities. Others of course are larger, encompass the city and outlying areas, and represent the full scope of event type from arts, music and entertainment to culture, sport and the outdoors. The Event Development will seek to discover openings and opportunities in the event calendar and portfolio and make recommendations to fill the same.

As such, Resonance will review event listings, hold in-person discussions with select venues and event producers and conduct internet research on San Diego events and events / event strategies from other cities similar in nature to San Diego.

During the process of Event Development, Resonance will apply two criteria to help guide the review of information. The first is to view San Diego through the lens of a “world city” and how existing and potential events match up to this criteria. Second, Resonance will seek to identify and propose an “anchor event” that exhibits some, or all, of the following characteristics:

- **Size** – The event should be large enough to attract major local, national and international attention, draw a large number of people and garner media attention.
- **Have a champion** – A visionary with knowledge in the subject matter and who is able to influence others to support the initiative.
- **Appeal to locals and visitors** – The event must have resident support and broad cross-cultural appeal to the many diverse ethnic and cultural populations in San Diego but be strong enough to draw visitors to the city.
- **Be unique in San Diego**, or grow and/or develop to fill a gap in San Diego. An event that is successful in another city with similarities to San Diego could be replicated, an existing San Diego event could be developed to have greater success, or be revitalized with a new approach to be more successful than it was previously.
- **Repeatable** – If it is a one-off event then it should be very large; otherwise, an anchor event should be yearly or every two or three years.
- **Multi-day** – A single day large event could work with other activities built around it; however, the focus should be on multi-day events.
- **Event Mass** – Multiple events with a common theme could be amassed under a coordinating framework to build a much larger, more dynamic event.
Icon Development

Adi Weidenfeld published an important paper in 2010 entitled “Iconicity and flagshipness of tourist attractions” in the Annals of Tourism Research. He wrote:

*Iconic tourist structures have been designed in an attempt to symbolize the changing character of the area, to provide a memorable image that potential visitors will associate with it and to create footfall with attracting visitors.*

*Iconicity underlies a dialogue over history, space and identity, values between marketers and consumers about authenticity, and is directly affected by social and cultural objectives and products’ marketability.*

Our effort to create an icon of San Diego will be focused on “a person or thing regarded as a representative symbol, especially of a culture or a movement; a person or an institution considered worthy of admiration or respect” (Oxford English Dictionary) for San Diego.

Generally speaking for tourism, these elements of authenticity and mental perceptions construct the image of iconic attractions such as Mount Fuji, the Eiffel Tower, the Great Wall of China and the Taj Mahal, which serve as universally recognized symbols or representation of their location or culture/heritage and evoke a powerful image among both tourists and local residents.

In San Diego, our work will be focused on identifying these elements of authenticity and perceptions for the destination through secondary research, VIP interviews, Tourism Asset Mapping and the Ideation Workshops (see below) to translate these qualities into conceptual ideas and artists renderings.

Product Development

With the profiles of the anticipated / desired visitor of the future, potential market opportunities identified, potential market challenges for San Diego in the decade ahead identified, and competitive advantages and gaps defined, Resonance will conduct a series of six topical product development workshops with key relevant stakeholders in each group on:

- Placemaking & Urban Design – led by Brent Toderian, MCIP, President, TODERIAN UrbanWORKS
- Transportation – led by Brent Toderian, MCIP, President, TODERIAN UrbanWORKS
- Hotel Planning & Development – led by John Montgomery, Principal, Horwath HTL
- Meetings & Conventions – led by Paul Breslin, Principal, Horwath HTL
- Amusements & Attractions – led by Chris Fair, President, Resonance Consultancy
- Arts & Culture – led by Chris Fair, President, Resonance Consultancy

This activity is the third component of stakeholder engagement, with participants representing a broad selection of interested public and private sector stakeholders such as:

- Tourism marketing and management organizations
- Economic development agencies
- Parks and recreation departments
- Transportation departments
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• Airport authorities
• Planning departments
• Tourism related enterprises (hotels, restaurants, retail, attractions and events, travel agents, tour operators, destination management companies, museums, theaters, entertainment venues, coach companies, taxi and limo companies, RV parks, etc.)

The goal of the product development sessions is to articulate a clear vision for the future of tourism in San Diego and prioritize key tourism opportunities and challenges from a wide range of stakeholders.

Our team has led visioning and planning workshops in many countries and in multiple languages. We get sparks by rubbing brains together: our people and your community, because inspiration comes from places we don’t know by heart or by habit. We factor in the research we’ve done, and use all the combined energy to help stakeholders uncover new ideas, insights and innovations for their destination.

Resonance will begin each session with an overview presentation providing the project objectives and context. Discussions will then be focused on one topic per session in order to provide a deep dive into the issue, solicit a wide range of ideas and provide plenty of time for prioritizing opportunities and achieving general consensus.

For Resonance, the product development process is as much about business strategy as it is creativity and is differentiated by three core beliefs:

• Engaging a diverse range of participants in the visioning process.
• Shifting the dialogue from focusing on just “What Is” to “What Could Be” through the use of futures techniques and methodologies.
• Utilizing graphic facilitation methods and imagery in strategy-building exercises to paint pictures that are more robust than can be expressed by words alone.

Workshops will be targeted for half-day sessions (4-5 hours) and will be facilitated by Resonance with focus on the issues and opportunities presented in the SWOT Report. The timing and place of sessions will be agreed to, organized and scheduled with SDMTD.

It is expected that this workshop approach will be important to provide the project team with the necessary details to clarify the tourism opportunities and challenges that will feed the Destination Master Plan.

Stakeholder and Resident Survey

Based on past experience, it is likely that the Product Development Workshops will touch anywhere from 200-300 people throughout the San Diego metropolitan region, and although these stakeholders are usually the most vocal and the most engaged in the process, it is not unusual for a broader constituency of stakeholders and residents to be curious, opinionated and vocal about the process and results. In today’s age of social media and 24/7 news, it is important to make sure all voices can be heard.

As a result, we recommend that SDMTD undertake an online public survey of stakeholders and residents to quantify and report a broader measure of public opinion. This will also help to rank and prioritize the individual issues and opportunities defined in the Workshops based on general public opinion.
In Vancouver, this same approach was heavily promoted to industry and non-industry stakeholders as well as Vancouver residents. In total, 2,178 respondents completed the survey:

528 Tourism Industry Stakeholders (30.5%)
192 Non-Tourism Business / Organization (11.1%)
1,012 Residents (58.4%)

In total, these 2,178 respondents also provided more than 11,000 comments.

Although it’s difficult to know if this exercise reduced push-back, the Vancouver Master Plan did not receive any noticeable public resistance.

6. Recommendations & Priorities

TOWS Analysis

Resonance will then conduct a TOWS Analysis* utilizing the market threats, opportunities, key competitive advantages and gaps identified to generate a comprehensive set of specific placemaking, product, programming and protocol recommendations to enhance San Diego’s positioning and grow its market share. These recommendations will be general in nature, but illustrated with best practice examples from other North American, European and Asian cities.

• Place: This speaks to the integration of tourism development with the vision and urban planning of a region. The Place lens incorporates and considers the development of neighborhoods, parks, trails, public spaces and public transportation as key magnets and differentiating characteristics of a destination.

• Product: This is the most obvious and considers and addresses the development of the hardware of a destination such as its airport, convention center, hotels, and attractions.

• Programming: This considers and addresses the development of the software of a destination such as its festivals, events, and supporting services like way finding and visitor information.

• Protocol: This considers both the organizational structure and funding mechanisms for the development, marketing and management of tourism in a region, and the policy linkages between organizations within the region and outside of it at a state and national level.

*A TOWS analysis involves the same basic process of listing strengths, weaknesses, opportunities and threats as a SWOT analysis, but with a TOWS analysis, key threats and opportunities are examined first and key weaknesses and strengths are examined last. After creating a list of threats, opportunistic, weaknesses and strengths, we examine ways the organization can take advantage of opportunities and minimize threats by exploiting strengths and overcoming weaknesses.

This activity will lead to a final list of recommended development strategies that we believe will best resonate with the future market segments identified and that are also aligned with the interests and aspirations of stakeholders and residents to produce “market forecast driven” recommendations.
Development opportunities would then be identified as either “maintenance” or “growth” strategies and prioritized by the team as 5-year (short), 10-year (mid) or 15-year (long) initiatives to inform the demand analysis and forecasting.

**7. Destination Master Plan & Implementation**

*How best to organize, manage and implement the plan*

With a clear understanding of the destination assets, tourism trends, visitor markets, tourism demand, competitive landscape, stakeholder input, issues and opportunities, it is possible to articulate the key results for the Destination Master Plan.

Following the review of recommendations and priorities, the project team will prepare and deliver a draft report of activities, analysis, findings, issues and opportunities for review by the SDTMD and key stakeholders.

Following the draft report review and comments, the project team will then prepare and deliver the Final Report.

**San Diego Tourism Marketing District Summit**

Finally, the Destination Master Plan can serve as an agenda for a San Diego Tourism Marketing District Summit, organized to present and discuss the findings.

This is an opportunity to officially “launch” the Destination Master Plan, and to do so with city leaders as well as industry stakeholders in public support of the plan.

The details of the Summit timing, format, speakers and presentation will be developed with SDTMD.

The Summit’s invitation list would be organized by SDTMD and would be expected to include many of the key stakeholders engaged during the project.
DELIVERABLES
DELIVERABLES

SDTMD will receive a series of formal progress updates, usually in the form of an onsite Powerpoint deck and presentation to the SDTMD and key stakeholders, to coincide with each stage of the project.

1. Kick-off

Deliverable: Project Initiation Document – This document describes any changes to project scope, methodology and / or timing resulting from the kickoff meetings vis-à-vis the original proposal and contract. The document defines the lines of communications and management for the project, as well as checkpoints and processes for regular updates and reviews of work.

Included in the Project Initiation Document will be the articulation of SDTMD goals relative to the production of the Destination Master Plan. These goals will be used to judge the merit and applicability of issues and opportunities that are explored, discussed and ultimately included in the Destination Master Plan.

2. Research & Analysis

Deliverable: Situational Analysis – This project update presents the secondary research analysis of San Diego tourism results, market analysis, trend analysis and customer profiles; it also discusses and summarizes publicly-available information associated with issues and opportunities that impact Travel & Tourism business in San Diego now or may do so in the near future.

This update also summarizes the key comments made during the course of VIP stakeholder and focus group interviews and conversations. Stakeholders’ individual comments will be recorded and filtered based on the stakeholders’ knowledge, experience, involvement with San Diego tourism, insight, awareness, specificity and frequency; comments will be summarized into issue area findings.

Finally, this update reviews, assesses and maps the existing tourism infrastructure, products, services, hotel sector, programming and events for San Diego and compares and contrasts these results to competing destinations from several different perspectives (best practice, tourism competitors and meetings / convention competitors). The reviews will be compiled, summarized and analyzed to provide quantitative and qualitative rankings and prioritization.

3. Destination Development Workshops

Deliverable: Destination Master Plan Workshops Update – This project update summaries San Diego’s key tourism opportunities and challenges and their priority from a wide range of stakeholders. The update will present a consolidated SWOT Analysis for destination master planning with overall and market sector details (Resorts, Meetings & Groups, Transient Leisure).

4. Recommendations & Priorities

Deliverable: Destination Master Plan Recommendations & Priorities – This project update summarizes the key recommendations and priorities that have been developed for review and consideration by SDTMD and the key stakeholders.
5. Reporting & Delivery

Deliverable: Destination Master Plan – This report will present the background of the project, industry organizations and stakeholders in the process, and discussion of the destination master plan process itself. The report will include a summary of the Situational Analysis and will detail the state of the San Diego tourism industry, recent results, trends and developments, existing policy-making, planning and programming framework, key assets and potential constraints and opportunities. The report will then present the overall and detailed recommendations for the major areas of interest. Next, the report will document the future policy-making, planning and programming framework necessary to carry out the recommendations; it also includes a scaling and scoping analysis to prioritize recommendations with action plans, implementation process and protocols. Finally, a communications plan is presented to take the project forward.
The San Diego Tourism Marketing District Destination Master Plan table of contents might include:

**A. Introduction**

**B. Background**

i. History
ii. Tourism Industry Organizations and Stakeholders
iii. Destination Master Planning Process

**C. Situational Analysis**

i. State of the San Diego Tourism Industry Overview
ii. Recent Results
iii. Trends & Developments
iv. Existing Policy-Making, Planning and Programming Framework
v. Key Assets, Potential Constraints & Opportunities
vi. VIP Stakeholder Feedback
vii. Consumer Analysis
viii. Consumer Focus Group Feedback
ix. Product Assessment and Mapping
x. Event Gap Analysis
xi. Hotel Planning and Development
xii. Destination Master Plan Goals and Key Performance Indicators

**D. Best Practice Case Studies and Competitive Analysis**

i. Best Practice Destinations
ii. Tourism and Resort Competitors
iii. Meetings and Convention Competitors
iv. Findings, Implications and Strategies for San Diego

**E. Destination Master Planning Workshop Results**

i. SWOT Analysis (Overall and Market Sectors)
ii. Destination Master Plan Priorities

**F. Recommendations**

i. Overview
ii. Major Issue and Opportunity Categories
iii. Event Strategy
iv. Icon Strategy
v. Destination Attribute

**E. Action Plan & Implementation**

i. Future Policy-Making, Planning and Programming Framework
ii. Recommendations – Scale, Scoping and Growth Analysis
iii. Recommended Action Plans, Implementation Process and Protocols
iv. Communications
SAMPLE OF WORK
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.”

The Tourism Master Plan 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 (October 2011). 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 has been considered as part of the process, with more than 180 one-on-one stakeholder interviews conducted by Resonance Consultancy and the 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 neighborhoods, 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.

A copy of the Executive Summary is attached as Appendix A to this proposal.
The following is an overview of this project.

**Stages of Work**

The Vancouver Tourism Master Plan process included three major stages of work:

*Stage 1 – Consumer and Tourism Trends Research, Issues and Opportunities Identification*

The first stage in the creation of a Vancouver Tourism Master Plan consisted of a survey of secondary research. The Secondary Research Summary paper (included in Appendix B) discussed and summarized some 200 publicly available documents of issues and opportunities that were identified as impacting tourism industry business in Vancouver currently or in the near future.

These issues and opportunities were presented to establish a foundation and discussion guide for the engagement phase (Stage 2) of the Tourism Master Planning process. After further reflection, discussion and analysis, some of these issues and opportunities were considered and addressed in the Master Plan document.

The documented opportunities included:

- Aboriginal Tourism
- Chinatown
- Commercial Drive
- Culture
- Digital Media, Film & Television Production and Tourism
- Downtown Eastside
- Events
- Gastown
- Georgia and Dunsmuir Viaducts / Eastern Core
- Hastings Park PNE
- Mountain Biking
- Plaza of Nations
- Sports
- Transportation – Bike Share
- Vancouver Art Gallery

The documented issues included:

- Aviation – Strategy, Rules, Regulations, Policies & Fees
- Aviation – YVR and BC Airports
- Border Control
- Canadian Dollar
- Canadian Tourism Industry Deficit
- Cruise Ships
- Excitement
- Family Friendly
Stage 2 – Engagement – Stakeholder Consultations: One-on-One Interviews, Focus Group Sessions, Workshops and Online Survey

During the planning process for the Vancouver Tourism Master Plan project, it was envisioned that the project team would conduct a number of one-on-one interviews and a series of focus group / workshop sessions to review the secondary research document and answer a series of questions including:

1. What other issues do you see that affect tourism? What do you think are the most important issues to focus on?
2. What other opportunities do you see that could improve / enhance / grow tourism in Vancouver?
3. What issues / opportunities are most relevant to your organization?
4. What Vancouver neighborhoods outside the downtown core do you think could be leveraged as tourism experiences?
5. What other destinations have you visited that Vancouver could learn from?
6. What Big Hairy Audacious Goals could Vancouver set to move the tourism needle in the decade ahead?

At an early point in the scheduling / planning of these consultations, it became very clear that organizing a series of focus group and workshop sessions was not going to be collectively convenient for many of the individuals we had hoped to engage, so it was decided that we would instead meet with as many of these people on a one-on-one basis. In total we conducted more than 180 interviews in person and by phone for the Tourism Master Plan.

In addition to the opportunities and issues from the Secondary Research, this engagement phase identified a ‘long-list’ of additional opportunities and issues that should be considered by the Tourism Master Plan including:

- Advocacy Issues
- Advocacy, Activism and Government Relations
- Aquatic Tourism
- City Relations
- City Tourism Office
- Cruise Passenger Terminal
- Cruise Season Opening Day
- Destination Marketing and Industry Promotion
- Digital Visitor
- Granville Island
- Incentives
- Indoor Attractions
- Industry Spokesman
- Liquor and Alcoholic Beverages
- Maritime Museum
- Neighborhoods
- Night Lights
- Panhandling and Loitering
- Product Development
- Public Art
- Regional DMMO
- Seabus
- Signature Event(s)
- Stanley Park
Next, the original issues and opportunities from the Secondary Research and these new issues and opportunities identified in the engagement process were then used to create an online survey which lasted four weeks ending on April 15, 2013. The online survey was heavily promoted to industry and non-industry stakeholders as well as Vancouver residents. In total, 2,178 respondents completed the survey:

- 405 Tourism Vancouver Members (23.4%)
- 123 Tourism Business / Organization (non-TVan Member) (7.1%)
- 192 Non-Tourism Business / Organization (11.1%)
- 1,012 Residents (58.4%)

These 2,178 respondents also provided more than 11,000 comments.
Stage 3 – Analysis of Issues and Opportunities

The Master Plan report includes the analysis and summary of issues and opportunities. Although the full report (200+ pages) of the Vancouver Tourism Master Plan is an internal document and is not available to the general public, the Table of Contents includes:

VANCOUVER TOURISM MASTER PLAN

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Project Communication and VancouverTourismPlan.org

To better communicate the process, activities and results of the Tourism Master Plan project Resonance Consultancy established, constructed, delivered and maintained an online portal www.VancouverTourismPlan.org open to industry stakeholder and community residents. This portal – now offline – served as centralized point of information on the project with News, Background, Insights and the Master Plan. The website also allowed for input, comments and contacting the project team.

During the course of the project, Resonance communicated regularly to the industry and community-at-large thru the website blog and directly via email alerts. Several of these postings are reproduced below to give a sense of the major project events.

Vancouver Tourism Plan blog from January 24, 2013 – A Hands-On Start

On January 17, 150 members of Tourism Vancouver got a hands-on experience of the information-gathering process that was to be used for the Tourism Master Plan.

Members of the Resonance Consultancy team, which has been charged with leading the master plan process, met industry members at the Fairmont Waterfront to explain the plan and get some input.

The members were presented with a list of documented issues around tourism, emerging opportunities for Vancouver, and general tourism industry trends. Then they were asked five questions, which were projected on a screen. The twist is that TVan members answered by text through their smartphones, and the responses showed up immediately on a screen. It allowed members to provide instant, anonymous feedback.
Vancouver Tourism Plan blog from February 20, 2013 – A Flood of Fresh Ideas

Conversations with people involved in tourism, interested in tourism or inspired by tourism have produced a wealth of ideas about the future of the industry in Vancouver. We’ve talked to entrepreneurs, bosses, digital bright lights, LGBTQs, educators, architects, First Nations, BIAs, DMOs, artists, advocates for the disabled, people from the City of Vancouver, bureaucrats, restaurateurs, gardeners, merchants, hoteliers, developers, people with attractions, stadia, convention centres, trains, trolleys and taxis and many other interests. In fact, we’ve talked to 112 people so far.

The Resonance team, which is charged with leading the master plan process, has conducted the in-person and telephone interviews over the past month, with more to come. People have frankly and thoughtfully discussed what works, what needs work and how to make things better. We’ve heard big hairy audacious ideas and smart strategies to better use what we’ve already got. We’ve heard what people think is the next great neighbourhood for tourism and we’ve heard a hundred new opportunities. It’s incredibly exciting.

A steering committee has been struck that involves people from the City of Vancouver, Tourism Vancouver, Vancouver Economic Commission and Resonance. Goals, based on the Rethink report recommendations in 2010, have been agreed upon by all parties. With common objectives, we’re working to figure out what steps need to be taken to reach them.

What’s next? We’ll finish the interviews by the end of February, then start on Phase II of Master Plan prep: gathering groups together for a charrette process designed to dig into some of the issues and opportunities we heard. Phase II, which should clarify key opportunities, will wrap up around April 4, 2013.
Vancouver Tourism Plan blog from March 14, 2013 – Forging Ahead with Phase II

On Friday March 15, the Resonance team begins Phase II of the Tourism Master Plan by holding the first of a series of charettes—workshops designed to help evaluate and prioritize the tourism opportunities that we heard in our 150 interviews with a wide range of people invested and interested in tourism in Vancouver. The first charette will be held with Tourism Vancouver’s Management team; others will follow.

As we proceed, we’re keeping the overarching goals of the Master Plan in mind. These goals emerged from meetings with the master plan steering committee, a group made up of representatives from the City of Vancouver, Tourism Vancouver and the Vancouver Economic Commission.

The goals are framed by what we call “Triple E Tourism”: Economic, Environmental and Experiential.

**Economic:** What kind of tourism attractions, other tourism products and opportunities will create sustainable economic growth in Vancouver? How do we evaluate opportunities to ensure that they bring maximum economic benefit to the city and its residents?

**Environmental:** Vancouver is a leader in urban sustainability. Where and how can the goals of the tourism industry dovetail with those of the City of Vancouver? How do we make tourism products more environmentally sustainable? How does the visitor experience Vancouver’s green capital?

**Experiential:** What kinds of experiences do we want to offer to visitors? What are the experiences that reflect who we are and that provide an authentic path for the visitor to get to know us? What do we want visitors to remember?

Soon, an online survey will be made available to everyone—Vancouver citizens, businesses and people in tourism at every level. The survey synthesizes findings of opportunities and challenges and invites input and feedback. You’ll be hearing about it!

Vancouver Tourism Plan blog from March 20, 2013 – Your Survey Has Arrived!

Take our online survey and help shape the future of tourism in Vancouver. You could even win an iPad mini!

In the past several months, the Resonance team has heard from stakeholders intimately involved in the tourism industry, business people in a variety of sectors and neighbourhood spokespeople who are passionately inspired by the enormous potential of tourism in our city. We’ve listened to more than 150 people. And now we want to hear from you.

You’ll find enclosed a brief online survey that summarizes many of the challenges and opportunities Resonance has heard in the course of the interviews. In it, we ask your feedback and your opinion about their importance.

Once the survey data is complete, Resonance will create a summary document of all prioritized issues and opportunities. That document wouldn’t be complete without your input and that of your friends and colleagues.

The survey is anonymous and takes less than 15 minutes to complete. All responses will be held in strictest confidence by Resonance Consultancy.
And if you participate, you could win a draw for an iPad mini!

The survey is a great opportunity for you to have your say and for those around you to provide input. Please share it with everyone you know who cares about the future of our city.

**Vancouver Tourism Plan blog from March 28, 2013 – Tourism Survey, the Movie!**

In living colour and in a few short minutes, Tourism Vancouver’s Rick Antonson and Richard Cutting-Miller explain why you, your friends and colleagues should participate in the Tourism Vancouver Survey.

Since March 20, Vancouverites of all persuasions have been asked to share their opinions and ideas for the future of tourism in the city via the short survey you can access here. We’ve had great response, and the results will be reflected in Vancouver’s first ever Tourism Master Plan.

There’s still time to make your voice heard. If you need more reasons to participate – besides the chance of winning an iPad – we’ve got lots. We asked Rick Antonson, president and CEO of Tourism Vancouver and Richard Cutting-Miller of Resonance Consultancy, the firm stewarding the master plan process, to explain what a tourism master plan is, why it’s important to Vancouver, and why you should have your say.

“People who care about the tourism industry, or who care about Vancouver and its future get to have a say,” Antonson says. “We have a chance to influence what comes about. We should be thinking today about 20, 30 years down the road. Because 30 years down the road, the Vancouver we’ll have is being shaped – or not shaped – today.”

Be part of it! Participate in the survey because you care about tourism, because you care about Vancouver, or even if you care about winning an iPad. The movie’s about three minutes and the survey takes about 15. We look forward to hearing what you have to say. Of course, it’s anonymous and completely confidential. So speak up! You have until April 15th, 2013.

The YouTube video can be seen here:
http://www.youtube.com/watch?v=UoevZaH5Jq8
This video encourages Vancouverites to participate in a short survey about tourism in the city. The survey is designed to obtain feedback on issues and opportunities that have been identified during the course of creating Vancouver's first Tourism Master Plan. The project has been undertaken by Tourism Vancouver, the City of Vancouver, the Vancouver Economic Commission and the Vancouver Convention Centre. The process is facilitated and shepherded by Resonance Consultancy. In the video, Tourism Vancouver President and CEO Rick Antonson and Resonance Consultancy's Richard Cutting-Miller explain the purpose of a tourism master plan and its importance to the growth of tourism in the city. Take a listen and participate in the survey!

Vancouver Tourism Plan blog from April 16, 2013 – Thanks for Your Smarts!

The online survey about tourism in Vancouver is now closed, but the 2,178 responses and astounding 11,127 thoughtful written comments and suggestions will live on, shaping the content of Vancouver’s first ever Tourism Master Plan.

The survey, which was open to tourism industry people and Vancouverites of all stripes, began nearly a month ago. The questions were distilled from the content of more than 175 one-on-one interviews conducted by Resonance Consultancy with key stakeholders in the tourism industry.

From here, the interviews and survey responses, along with the goals established with members of the Tourism Master Plan steering committee, will all be considered and weighted as areas of focus for the final report are determined.

Readers of this space have likely already seen the video about the tourism master plan, which stars Rick Antonson, president and CEO of Tourism Vancouver, and Richard Cutting-Miller of Resonance. Most recently, the dueling Ricks taped a radio segment with Cheryl MacKinnon for her Great Getaways travel show on Vancouver’s CKNW.
Resonance Consultancy, the firm shepherding the master plan process, along with the City of Vancouver, Tourism Vancouver and Vancouver Economic Commission, would like to thank everyone who participated, Tweeted, Facebooked and otherwise spread the word about the survey. Stay tuned for the outline of main areas of focus for the report, which will be announced soon.

**Vancouver Tourism Plan blog from May 8, 2013 – Draft Report Takes Shape**

The input is officially in, and the output has begun. The draft of the first Vancouver Tourism Master Plan is advancing quickly. Indeed, everyone at Resonance Consultancy, the company charged with producing the report, is writing as fast as they can.

After the close of the extremely well-attended online survey on April 15 – congratulations to Nikos Kallas, president of Metropolitan Printers, for winning the iPad Mini – interested parties from the public and industry got two more chances to chime in. Public events were held at Yaletown Roundhouse April 23rd and at the Tourism Showcase at the Convention Centre on April 24th.

After much deliberation and weighting of passionate, well-informed opinions from industry and residents, eight broad topics were chosen as the core of the report. Each of these areas of focus will be broken down into specific recommendations, along with short-term action items assigned to Tourism Vancouver, the City of Vancouver and other partners.

Here are the eight areas of focus for the report:

- Transportation, a key issue for the public and industry alike, looks at public transportation needs through the lens of visitors and the businesses and employees that serve them.
- Visitor Experience Design discusses ways to innovate on Vancouver’s value proposition through wayfinding, digital visitor experience and the like.
- Events suggests how to create, enhance and fund events of all kinds – indoor, cultural, sports, etc.
• Product Development suggests ideas to grow original tourism concepts and experiences around the city year-round.
• Partnerships and Alliances suggests ways to create a unified voice for Vancouver's tourism industry.
• Tourism Infrastructure Development discusses areas of opportunity to create tourism precincts, corridors, plazas, meeting places and the like.
• Neighbourhoods suggests how the diversity of city neighbourhoods can create and deliver tourism experiences that also enhance quality of life for locals.
• Advocacy and Public Affairs pinpoints issues on which the industry must advocate and articulate positions, from liquor laws to airline charges.

The Lower Mainland Tourism Alliance received a presentation of the broad strokes of the report on April 18, and Tourism Vancouver staff heard a presentation on April 22. Tourism Vancouver’s Board of Directors was brought up to speed on progress on May 2. Tourism Vancouver provided their input on April 30, The City of Vancouver on May 6, and the Vancouver Economic Commission on May 8.

The Tourism Master Plan is heading for an unveiling at the Tourism Vancouver Annual General Meeting in mid-June. Stay tuned for more details.

Vancouver Tourism Plan blog from May 30, 2013 – Almost Ready for Prime Time

The Tourism Vancouver Annual General Meeting is coming up on June 13, and Resonance Consultancy is making final tweaks and additions to the Tourism Master Plan Overview, which will make its debut to TVan membership at the AGM.

The Overview contains detailed recommendations on the master plan’s eight areas of focus, and runs 24 pages. (The draft of the complete report is more like 200, but that’s another story.)

A project this big and important involves a lot of people and a lot of opinions – besides those of the stakeholders, gathered in 180 one-on-one interviews, and over 2,000 members of the public who participated in the online survey. Here’s a rundown on who gets final input into a plan that’ll bring together Tourism Vancouver, the City of Vancouver and many other partners in a common vision for the growth of tourism in the city:

• Our Steering committee, made up of the City of Vancouver Deputy City Manager Sadhu Johnson and Assistant City Manager Wendy Au; Tourism Vancouver’s Executive Vice President Paul Vallee, and Vice President, Marketing Communications & Member Services Walt Judas; Vancouver Economic Commission’s A/CEO Joan Elangovan, Manager, Special Events & Projects Katrina Tu, and Manager, Research and Planning Matt Jacques, and others.
• The Vancouver City Councillors and Corporate Management Team, including reps from Culture, Transportation and Parks
• Mayor Gregor Robertson and City Chief of Staff Mike McGee
• The Tourism Vancouver Board of Directors

Did we forget anyone? Of course, the Tourism Vancouver team has been at our side since day one of this adventure.

Mayor Robertson, TVan Board Chair R. Gordon Johnson and TVan President and CEO Rick Antonson will all be part of the unveiling of the Tourism Master Plan Overview June 13. We can’t wait to show it to you.
Vancouver Tourism Plan blog from June 14, 2013 – Ladies and Gentlemen: Meet the Plan

Highlights of Vancouver’s new Tourism Master Plan were presented at Tourism Vancouver’s Annual General Meeting at the Vancouver Playhouse June 13.

In front of a packed house of 300 TVan members, Mayor Gregor Robertson and TVan Board Chair R. Gordon Johnson addressed the eight main recommendations of the plan, which are in the official powerpoint presented at the session. Take a look for yourself here.

http://issuu.com/resonanceco/docs/vancouver_tourism_master_plan_final/1?e=3122820/5237839

The goals of the Master Plan, decided early in the process, were to set parameters for the Vancouver Experience for both visitors and residents; to frame Economic Growth in terms of visitor spend, seasonality and investment; and to consider the environment and set a goal of becoming a leading sustainable destination.

Certainly, one of the overarching aims of the Master Plan was to more closely align Tourism and the City of Vancouver, and as Mayor Robertson enthusiastically engaged on the recommendations with TVan’s board chair, it was clear that the City recognizes tourism as a key partner, one whose goals dovetail with theirs.

“Tourism is one of Vancouver’s most exciting and significant industries, supporting over 28,000 jobs in our city,” said the Mayor at yesterday’s event. “Building on the incredible success of the 2010 Olympic and Paralympic Winter Games, it is an industry with vast potential for growth and one that merits the full ongoing support of government partners. It is important that we come together to ensure coordinated development that meets the future needs of residents, visitors, investors and other stakeholders in showcasing Vancouver to the world.”
The eight recommendations from the plan cover these areas:

- The initiation of a product development strategy in 12 areas of opportunity.
- The establishment of an events organization to facilitate the delivery of cultural, sports and signature events around the year, particularly in Q1 and Q4.
- The comprehensive assessment of the visitor experience, including journey mapping, digital visitor experience, hosting, sustainability and wayfinding.
- The creation of a neighbourhood marketing council with BIAs to promote cultural diversity and consider key neighbourhoods as tourism destinations.
- The planning and backing of key development opportunities for tourism infrastructure, including Granville Island, NE False Creek and the creation of a “Tourism Corridor” on Georgia Street.
- The incorporation of the needs of visitors into public and private transportation, particularly with regards to late night public transportation and walkability issues.
- The alignment of advocacy interests of tourism partners for the benefit of visitors and the industry, particularly on issues such as liquor and alcoholic beverages, tourism workforce development and aviation.
- The formalization of an ongoing group of city, industry and tourism partnership to oversee master plan actions and report back to industry and residents.

Post Project Presentations and Webinar

Following the delivery of the Vancouver Tourism Master Plan, Resonance Consultancy presented highlights of the project in Orlando at the Destination Management Association International Annual Convention (July 16, 2013). Resonance Executive Vice President Richard Cutting-Miller, Tourism Vancouver President & CEO Rick Antonson and Executive Vice President Paul Vallee presented highlights and conducted an extensive Q&A on the process to more than 100 convention attendees.

Also in July 2013, Richard Cutting-Miller conducted a webinar on Tourism Master Planning with details from the Vancouver project. A copy of the webinar can be heard here:

A copy of the webinar slides can be downloaded here:
http://www.slideshare.net/chrisfair/resonance-tourism-master-plan-webinar
June 21, 2013

To whom it may concern:

The letter is to confirm that Resonance Consultancy Ltd. was engaged by Tourism Vancouver and completed the creation of a Tourism Master Plan for the city of Vancouver between December 2012 and June 2013 with a total project value of more than $375,000.

Resonance Consultancy principals Chris Fair and Richard Cutting-Miller and their entire team conducted themselves with the utmost level of professionalism throughout the entire process. The level of engagement and participation that they generated from the public, industry and government was extremely impressive. They effectively balanced and managed the needs and opinions of a diverse range of both public and private stakeholders throughout the process, leading to a set of practical and relevant recommendations. Resonance Consultancy has demonstrated ability to lead, create, and manage the master planning process and we would recommend them to other destinations without reservation.

If you would like to discuss further about our experience with Resonance Consultancy, please do not hesitate to ask. My email is pvallee@tourismvancouver.com and direct line is +1-604-631-2815.

Yours sincerely,

Paul Vallee
Executive Vice President
PROPOSED COST & WORKPLAN
PROPOSED COST


The following tables illustrate our financial proposal for this project. The Professional Fees are set at US$434,000, travel expenses are estimated at US$52,150 and third party research is estimated at US$4,000. The total proposal for this project is US$490,150.

Thank you for the opportunity to propose on this project.

Professional Rates

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## PROPOSED COST

### Travel Expenses

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*The Provisional Activity (Visitor Survey) will only be recommended if existing consumer research is not sufficient to properly assess the quality of San Diego tourism products by existing visitors. The cost for the Provisional Activity will be an additional $14,000, not included in the table above.
## PROPOSED COST

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REFERENCES
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The following is a selection of recent and current Resonance projects with reference contact details.

Paul Vallee
*Executive Vice President*
Tourism Vancouver
tel: +604.631.2815
pvallee@tourismvancouver.com

René Hubert
*Urban Planner, Vice President, Associate*
IBI/DAA Group
cell: +1.514.247.0603
rhubert@groupeibidaa.com

Susan Veres
*Vice-President, Marketing & Communications*
Calgary Municipal Land Corporation
tel: +1.403.718.0300
cell: +1.403.807.1007
sveres@calgarymlc.com

Brent Herrington
*President*
Kukui‘ula Development Company
Kaua‘i, Hawai‘i
tel: +1.808.742.3024
bherrington@dmbinc.com

Projects that Resonance has lost:

*Franklin County, NY – Destination Development Plan*
Resonance was selected by an RFP process to develop a Destination Development Plan for Franklin County NY. However, the County Council ultimately voted not to authorize funding for the project.

*Western New York State Regional Branding Project*
Resonance was selected as runner up out of a dozen firms in this RFP process. Although the Resonance proposal was selected as best among the 12 submissions, the client was not satisfied with the presentation made by Resonance’s MWBE partner (required by NY State regulations) during the presentation phase.
APPENDIX A
BIDDER RESPONSE INFORMATION
Section I: General Bidder Information

1. BACKGROUND
   a. Provide a brief summary describing your organization, its history, structure and ownership. Include the full name, address and phone number for your corporate headquarters. Provide a copy of your most recent annual report (or report to employees/partners.)

   *Please see section entitled: Business Identification & Contact Information (Page 08). Resonance Consultancy does not publish an annual report.*

   b. How long your company has provided these consulting services and what percentage of your organization’s business do these services represent?

   *The principals of Resonance Consultancy have been providing these consulting services for more than 50 years (combined). These services represent approximately 50% of the organization’s business.*

   c. What is total number of organizations for whom you provide each of these services? How many people do you employ to handle these services?

   *Resonance Consultancy normally provides these services to 2-4 organizations per year. Resonance Consultancy employs 7 full time employees.*

2. REFERENCES
   a. Provide four (4) references from clients for which you provide these services.

   *Please see section entitled: References (Page 108).*

   b. Provide two (2) clients for which your company lost projects in the last two (2) years, and the reason(s) why.

   *Please see section entitled: References (Page 108).*

3. FINANCIAL RATING
   a. Provide a copy of your company’s latest audited financial statements (for year-end and the most recent quarter).

   *Please see Appendix B – Company Financial Statements (Page 155).*

   b. Describe any actions that any financial institution, local, state, federal agency or private organization has made or taken with respect to your organization or parent company.

   *None*
4. ORGANIZATIONAL COMMITMENT

a. Does your firm plan to outsource any activities related to this bid to any third parties? If so, list any third parties employed and describe the functions they perform. Describe contractual arrangement with third party.

Resonance Consultancy will subcontract certain activities, identified in the Workplan (Page 106) to the following firms:

- Horwath HTL – Global leader in hospitality consulting;
- TODERIAN UrbanWORKS – Award-winning Vancouver-based consultancy providing services in advanced urbanism, city planning and urban design; and
- Insights West – A progressive, full-service market research company offering insights-driven research solutions and interpretative analysis through leading-edge tools, normative databases and senior level expertise.

A comprehensive description of these firms, their services and role in the project are described on Pages 12-79.

Section II: Services

1. Describe your overall processes for each of the services requested.

The overall processes for each of the services requested is described in the section entitled: Technical Approach and Proposed Processes (Page 57).

2. Describe your approach to the services requested. Include an overall plan that incorporates timeline/key deadlines, actions, critical decision points, resources required and any associated risks.

The approach to the services requested, actions, critical decision points, resources required and any associated risks are described in the section entitled: Technical Approach and Proposed Processes (Page 57). The timeline/key deadlines are described in the section entitled: Workplan (Page 106).

3. Describe your understanding of the TMD’s role in the process and the required time commitment.

Our understanding of TMD’s role includes:

- Solicitor and contracting organization for the project.
- Facilitation of the project activities for the selected consultant
- Review and decision making associated with work products

It is expected that TMD will commit the necessary time and resources to the project to:

- Participate in status updates and periodic project meetings
- Review and comment on work products
• Facilitate activities between the consultant project team and local stakeholders
• Collect and provide secondary research and other materials

Section III: Project Management

1. Describe your project management plan and process, philosophies, and experience proposed to handle this project.


2. Outline your vision of the San Diego 20-Year Tourism Master Plan development including the number of representatives, the hierarchical level they represent, years of related experience, and additional qualifications.

   See section entitled: Key Project Personnel (Page 20).

3. What is the procedure for selecting and assigning the project manager(s) to client organizations? How many clients do your project managers handle? What are your project management “back up” arrangements?

   The project manager for this Destination Master Plan will be Chris Fair, President of Resonance Consultancy. As President, Chris takes responsibility for all client activities for the firm. Richard Cutting-Miller, Executive Vice President of Resonance Consultancy is the “back up” project manager.

4. What method does your organization normally use to communicate “best practices” to its clients?

   “Best practices” are communicated verbally or in writing to clients depending on the circumstances and requirements of the individual projects.

5. How does the project manager educate and communicate with staff regarding contract specifications?

   All staff are briefed on contract specifications by the project manager at the inception of the project.

Section IV: Controls/Systems/Security

Describe your hardware and software environment including software platform, system architecture.

Resonance Consultancy operates and maintains a secure intranet for the sharing and transfer of electronic files efficiently and securely.

Resonance Consultancy utilizes the latest Macintosh computers and most recent versions of Adobe Creative Suite and Microsoft Office for the creation and management of files. All electronic files created by Resonance are shared via a secure server backed up to an offsite location three times daily.
Email communications from Resonance are hosted by Google to the highest international security standards.

1. What measures does your organization take to ensure the confidentiality of your client’s data (e.g., confidentiality agreements with stakeholders, clients, third parties, etc.)?

   Resonance Consultancy regularly executes confidentiality agreements with clients, stakeholders and third parties as requested and required.

2. What is your preferred format for receiving data or information?

   Resonance Consultancy prefers receiving data or information via a secure Dropbox folder.

3. Do your electronic data communications currently comply with HIPPA regulations?

   Resonance Consultancy and its consulting work are not associated with healthcare or medical information and its electronic data communications is therefore not regulated by HIPPA.

4. Describe your security measures for data transmission.

   Resonance Consultancy uses the most secure data transmission measures provided by Google and Dropbox.

5. What type of disaster recovery plan do you have for service and data recovery?

   All electronic files created by Resonance are shared via a secure server backed up to an offsite location three times daily.

Section V: Pricing

1. Please provide a not-to-exceed fee for the San Diego 20-Year Tourism Master Plan. Each quoted fee should be supported with a rate schedule that details the titles and responsibilities of personnel who will be performing this work. Fees should also include the level of consulting, system programming, or technical advice needed to complete the services requested in this RFP and all outside supplier expenses if applicable.

   a. San Diego 20-Year Tourism Master Plan Development including the entire scope of work noted in the RFP document.

      Total Not-to-Exceed Fee: $434,000
      Based on the following project team and rate schedule:
      See section entitled “Proposed Cost and Workplan” (Page 100).

   b. Expenses related to the development of the San Diego 20-Year Tourism Master Plan as noted in the RFP document.

      See section entitled “Proposed Cost and Workplan” (Page 100).

Travel Expense Policy and Guidelines Proposed

Resonance Consultancy will adopt the Travel Expense Policy and Guidelines of SDTMD for travel expenses associated with this project.
APPENDIX A – BIDDER RESPONSE INFORMATION

Third Party Expenses (Research or other)

See section entitled “Proposed Cost and Workplan” (Page 100).

Materials/Other Expenses

Total Travel Expenses and Purchase of Third Party Research Not-to-Exceed Fee: $56,150

Section VI: Billing & Payment

1. TMD will pay “net 60 days” upon completion of work and receipt of a valid invoice.

   Noted.

2. Provide a sample invoice showing the detail that you will include in billings.

   See Appendix D.

3. Include and describe additional payment discounting opportunities.

   Not applicable.

Section VII: Performance Guarantees and Continuous Improvement Outlook

1. Please include the performance measures for these services. Describe the performance guarantees you are willing to provide, including the dollars you are willing to put at risk for each one.

   Consistent with consulting services of this type, Resonance Consultancy Ltd. makes no express or implied representations, warranties or guarantees associated with a Destination Master Plan.

2. The TMD expects the selected supplier to continuously improve and enhance the quality of programs offered.

   Noted.

3. Describe your process for continuous improvement.

   To the extent this project is associated with “continuous improvement”, please see section entitled: Technical Approach and Proposed Process (Page 57).

4. How do you conduct research and benchmarking practices?


5. The TMD expects the supplier to provide all deliverables properly authenticated and endorsed by an authorized officer or principal of the organization.

   Noted.
APPENDIX B
VANCOUVER TOURISM MASTER PLAN – EXECUTIVE SUMMARY
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## IMPLEMENTATION 36
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
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?

1. 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.*
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.
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.
**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.
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.
SITUATIONAL ANALYSIS

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.
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.
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 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.
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.
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).
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**

* Photo used under Creative Commons from Lou
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.
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.
### 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

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.

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
RECOMMENDATIONS

FOUR NEIGHBOURHOODS

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

FIVE

TOURISM INFRASTRUCTURE DEVELOPMENT

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

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 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, pagentry 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.
Incorporate the needs of visitors into Vancouver’s public and private transportation system.
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.
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.
SEVEN

ADVOCACY AND PUBLIC AFFAIRS

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

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

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.
APPENDIX C

COMPANY FINANCIAL STATEMENTS
Notice to Reader

On the basis of information provided by management, we have compiled the balance sheet of Resonance Consultancy Ltd. as at December 31, 2013 and the statement of earnings, retained earnings and cash flows for the year then ended. We have not performed an audit or a review engagement in respect of these financial statements, and accordingly, we express no assurance thereon. Readers are cautioned that these statements may not be appropriate for their purposes.

D.J. Heidt, Chartered Accountant
West Vancouver, B.C.
May 19, 2014
Resonance Consultancy Ltd.
Balance Sheet
December 31, 2013
(unaudited - see Notice to Reader)

<table>
<thead>
<tr>
<th>Assets</th>
<th>2013</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current assets</td>
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<tr>
<td>Cash</td>
<td>$62,902</td>
<td>$43,927</td>
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<td>Accounts receivable</td>
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<td>179,378</td>
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<td>HST recoverable</td>
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<td>5,797</td>
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<td>Income taxes recoverable</td>
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<td>15,032</td>
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<td>Deposits and prepaid expenses</td>
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<td>12,098</td>
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<td>Loan to shareholder</td>
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<td>219,300</td>
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<td>200,708</td>
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<tr>
<td>Capital assets, net of accumulated amortization of $51,567 (Note 3)</td>
<td>19,250</td>
<td>21,595</td>
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<tr>
<td>Investment in Resonance Branding, A Partnership, 50% interest (Note 4)</td>
<td>2,288</td>
<td>–</td>
</tr>
<tr>
<td>240,838</td>
<td>$240,838</td>
<td>$282,303</td>
</tr>
</tbody>
</table>

| Liabilities |        |        |
| Current liabilities |        |        |
| Accounts payable and accrued liabilities | $24,170| $51,738|
| Bonus payable | –      | 10,000 |
| GST payable | 8,046  | –      |
| Income tax payable | 1,000  | –      |
| Payroll taxes payable | 3,275  | –      |
| 36,491 |        | 61,738 |

| Shareholder’s Equity |        |        |
| Share capital (Note 5) | $53  | $53   |
| Retained earnings | 204,294 | 220,512|
| 204,347 |        | 220,565|
| $240,838 | $240,838| $282,303|

| Commitments (Note 6) |        |        |

Approved on behalf of the Board:

Director

The accompanying notes are an integral part of these financial statements.
Resonance Consultancy Ltd.
Statement of Earnings
for the year ended December 31, 2013
(unaudited - see Notice to Reader)

<table>
<thead>
<tr>
<th></th>
<th>2013</th>
<th>2012</th>
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<tbody>
<tr>
<td>Revenues</td>
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<td></td>
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<tr>
<td>Production revenue</td>
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<td>$ 1,003,377</td>
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<tr>
<td>Consulting fees</td>
<td>367,436</td>
<td>108,012</td>
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<td>Reimbursable costs</td>
<td>69,081</td>
<td>48,629</td>
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<td></td>
<td>993,938</td>
<td>1,160,218</td>
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<td>Production costs</td>
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<td>Management fees (Note 7)</td>
<td>370,178</td>
<td>309,953</td>
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<td>Salaries and wages</td>
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<td>247,950</td>
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<td>Reimbursable costs</td>
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<td>49,217</td>
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<td>Production costs</td>
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<td>170,325</td>
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<td>Consulting fees</td>
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<td></td>
<td>750,397</td>
<td>777,445</td>
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<td>Gross margin</td>
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<td>382,773</td>
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<td>General and administrative</td>
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<tr>
<td>Travel and conferences</td>
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<td>35,432</td>
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<tr>
<td>Office and misc</td>
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<td>54,682</td>
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<tr>
<td>Rent and utilities</td>
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<tr>
<td>Consulting fees</td>
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<td>Marketing and promotion</td>
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<td>Professional fees</td>
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<td>Meals and entertainment</td>
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<td>5,805</td>
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<td>Communications</td>
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<td>Memberships and dues</td>
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<td>Insurance</td>
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<td>Amortization (Note 3)</td>
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<td>Net (loss) earnings from operations</td>
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<td>$ 138,890</td>
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<td>Other income (expenses)</td>
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<tr>
<td>Income from share of Resonance Branding</td>
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<td>Foreign exchange income (loss)</td>
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<td>(3,910)</td>
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<td>Other income</td>
<td>978</td>
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<tr>
<td></td>
<td>37,377</td>
<td>(3,910)</td>
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<tr>
<td>Net earnings before income taxes</td>
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<td>Provision for income taxes</td>
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<td>18,392</td>
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<td>Net earnings</td>
<td>$ 13,782</td>
<td>$ 116,588</td>
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The accompanying notes are an integral part of these financial statements.
#1009
Apr 15, 2014

Resonance Consultancy LLP
33 Water Street, Suite 601
Vancouver :: BC :: V6B 1R4
Canada
www.resonanceco.com

Billed To

ATT:

In Reference To
Growth Modeling Study [R14-031]

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<th>Item</th>
<th>Subtotal</th>
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<td>Professional Fees – Progress Payment 20%</td>
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<tr>
<td>Out-of-Pocket Expenses March 2014 – see attached summary</td>
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<td>Subtotal</td>
<td>$41,638.37</td>
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Total due upon receipt $41,638.37 USD

Please make the total amount of $41,638.37 USD payable to Resonance Consultancy LLP. The total amount is due upon receipt.