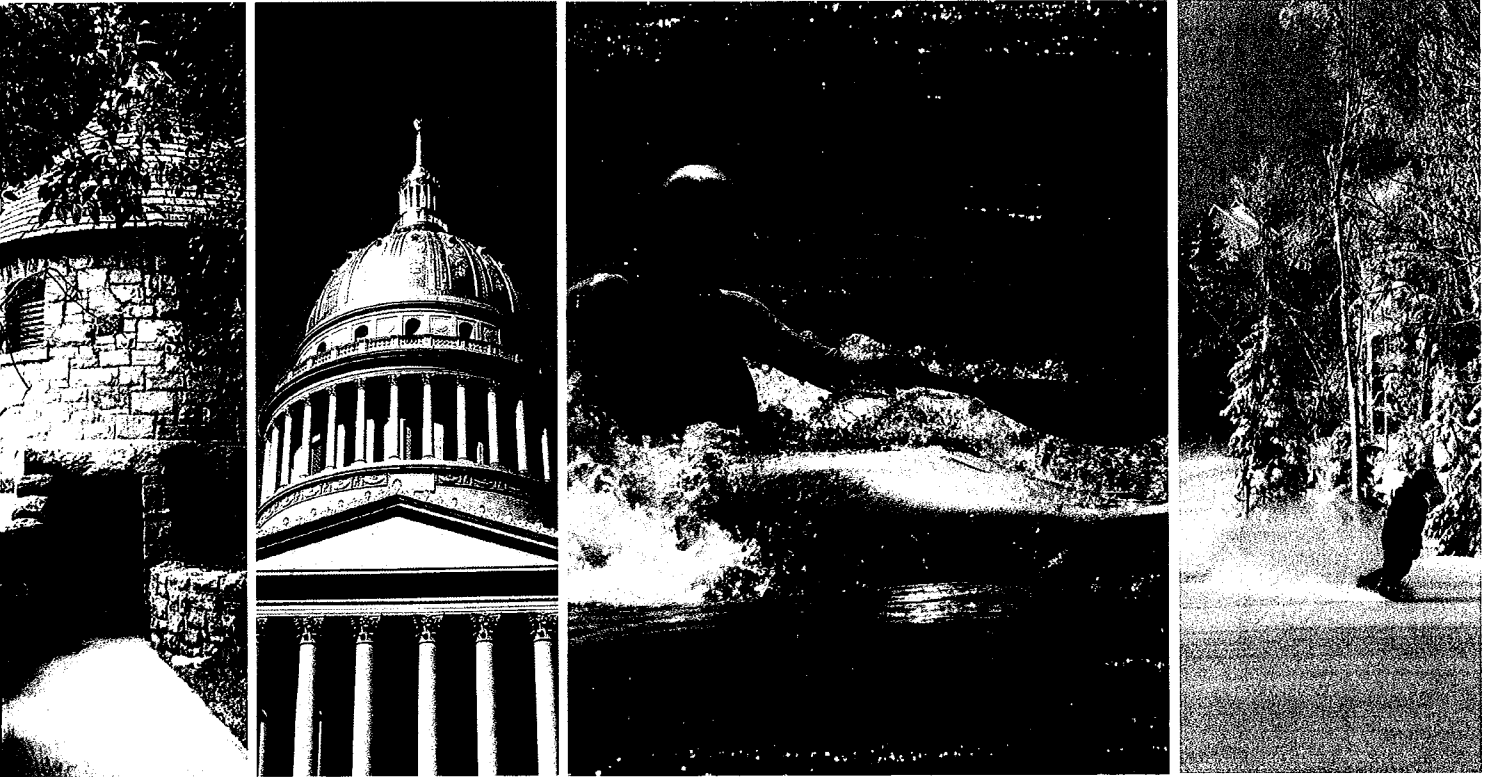


**ORIGINAL**

# Preparation of a Ten Year Tourism Strategic Plan for West Virginia



**TECHNICAL PROPOSAL #TOR4089**

**InterVISTAS**  
CONSULTING GROUP

prepared for

The State of West Virginia | Division of Tourism

prepared by

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# Executive Summary

## Overview

The State of West Virginia through Senate Resolution 31 is requesting a comprehensive analysis and action plan to fully develop the tourism industry in West Virginia, including the future development of events, attractions and facilities.

With a unique culture, history and geography, West Virginia tourism is "truly a sleeping giant," as identified by Senator Richard Browning, and represents a major opportunity for the economic growth and prosperity of the state.

InterVISTAS Consulting (InterVISTAS), a global consulting group in tourism, transportation and economic development, is pleased to submit this proposal to the state of West Virginia. Working in partnership with the key tourism stakeholders in West Virginia, we believe that we will not only collectively accomplish the goals set out in the RFP, but develop a Strategic Plan that will also deliver on broader state goals for economic development, employment and wealth generation.

Among the company's core competencies are tourism strategic planning, tourism business development, national and international tourism market development, economic development, economic and regulatory analysis, market research and analysis, and air service development.

InterVISTAS has completed more than 1,500 projects with over 250 clients in more than 40 countries worldwide. We have offices and staff located in Washington, D.C., Charlotte, San Francisco, Canada, Brazil, the UK, the Netherlands, Croatia, Turkey and Qatar.

We believe success will be achieved in West Virginia's Tourism Strategic Plan if the outcome: provides a platform for prudent and informed decision-making; ensures the development of an increasingly strong, diversified and competitive tourism product; identifies the institutional capacity and infrastructure to enable industry prosperity and growth; and expands the economic opportunities overall for the state and for all West Virginians.

## The Bid Team: InterVISTAS and Key Partners

For this critical assignment, InterVISTAS has partnered with the following groups to maximize the outcome for tourism development and economic strength in West Virginia:

**VITAL Economy** –The ViTAL Economy Alliance is a for-profit social enterprise providing consulting resources to state and regional economies while also assisting community leaders take stewardship and management of their economy. Since 1992, the work of the ViTAL Economy Alliance in the U.S. has led to billions of dollars in new, sustainable economic growth, hundreds of high performing businesses and the creation of thousands of high wage jobs.

**Management Analysis, Incorporated (MAI)** – MAI is an economic development and tourism master planning firm based in Vienna, Virginia that has served a wide range of government and private sector clients in in all 50 states, five of six U.S. Territories and numerous other foreign countries. For more than 35 years, MAI has aided governments in evaluating and developing policies, prioritizing investments in infrastructure, planning for new and emerging industries and maximizing opportunities to leverage public-private partnerships.

**Delcan** – Delcan is a global firm that has successfully delivered systems and infrastructure solutions for transportation projects in over fifty countries around the world. Over more than 50 years, Delcan has provided the highest caliber of traditional planning and engineering services, while also being at the forefront of innovation in technology and management solutions. As management consultants, Delcan advises top decision makers in the infrastructure and transportation sectors on strategy, technology, program & project management, asset management, and finance & economics. Delcan will contribute to the project team from its Vienna, Virginia office, yet where required, will also liaise with additional infrastructure specialists in its 8 other U.S. locations, or via its 17 international offices.

**West Virginia University - Bureau of Business and Economic Research** – Under the guidance of its Director, Dr. Tom Witt, the Bureau of Business and Economic Research (BBER) is West Virginia's leading economic research center. Among many other industry sector studies in economics for public and private sector groups in the state and beyond, the team at BBER has conducted two major projects for West Virginia's Division of Tourism (Tourism and the West Virginia Economy, 2007 and 2005), and has published more than 40 other documents on the tourism economy of West Virginia.

### **Qualifications and Experience**

The bid team is comprised of individuals who have direct in-industry executive experience and extensive consulting experience working in tourism and economic development programs for states, provinces, government departments, destination marketing organizations at regional and city/resort levels, tour operators, travel agencies, airlines and airports.

We have a long and successful track record planning and marketing the types of tourism products and experiences that define West Virginia and are a key part of the state's economic future, including: four-season mountain recreation resorts; adventure tourism activities and sites; festivals and events; natural and built attractions; heritage/historic/cultural tourism; gaming and casinos; touring vacations; leisure groups; the Meetings, Conventions and Incentive market; and city/town destinations dependent on both leisure and business markets.

For example, we have conducted tourism or economic development strategic plans on behalf of:

- 43 regional economies in the U.S., as well as the U.S. territories of Puerto Rico and the Northern Mariana Islands
- The 2010 Vancouver Winter Olympic & Paralympic Games
- Whistler Resort, British Columbia and Banff/Lake Louise, Alberta
- The Provinces of British Columbia and Alberta in Canada (very similar to West Virginia's key four-season tourism products)
- The major city destinations of San Antonio, Texas and Vancouver, British Columbia

Key personnel have also advised development groups such as Intrawest and Resorts of the Canadian Rockies on various planning and marketing initiatives in Mammoth, California; Mont Tremblant, Quebec; Whistler-Blackcomb, Fernie and Kimberley in British Columbia.

Yet, it was critical to complement this global track record and experience with deep and expert knowledge of West Virginia's tourism and economic development climate and opportunities throughout the state. To this end, we will call upon Dr. Tom Witt and his team from the West Virginia University Bureau of Business and Economic Research to act as our strategic advisors at the key state, tourism region and county levels.

### **Relevant Projects For Review**

In the proposal, we have included summary information on 5 recent tourism and economic development projects that in our view are of direct relevance to the West Virginia assignment, convey our related skill sets, and shows tangible business outcomes in achieving clients' goals.

These projects are:

- The 2010 Olympic & Paralympic Games – Tourism & Economic Development Leveraging Plan
- The 2010 Olympic and Paralympic Torch Relay – Strategy to Highlight All Tourism Regions
- Washington State Tourism Strategy (Olympic Peninsula)
- Puerto Rico Tourism and Transportation Strategic Plan
- City of San Antonio, Texas – Tourism & Economic Development Plan for the Mexico Market

We have also included references as requested, and additional information on related tourism and economic development projects conducted for federal, state/province, municipal and private sector clients that demonstrate our expertise in:

- Comprehensive strategic tourism planning projects, and economic development projects
- Tourism marketing plans
- Long and short haul travel market studies and comparative analyses
- Transport access analysis such as state-to-state highway trends, cross-border highway trends, and air travel trends
- Detailed travel trade and visitor analyses
- Air market development and air route support.

### **Our Approach**

In partnership with West Virginia, our aim is to develop a ten year plan that protects and expands current tourism markets, while introducing new short and long haul markets. We will do this by working with industry and government partners to identify inter-related regional and product-specific tourism development and marketing strategies which build outwards from existing inventory and infrastructure to create new tourism offerings, packages and experiences to a wider range of potential tourists. At the same time, we will ensure the integrity of the tourism experience and its positive impact on the regions and counties of West Virginia.

For this assignment, we have created a comprehensive, three-stage strategic planning process that includes a Situational Analysis, Assessment of Options and the creation of a Strategy and Action Plan. This process will optimize our ability to work iteratively with the Steering Committee, the Division of Tourism, key stakeholders and regions, and ensure that we develop a comprehensive tourism strategy based on a deep understanding of both the travel market opportunities and of the tourism products and development potential in West Virginia.

## **Timeframe**

In terms of timeframe, we see the project duration spanning a 9 month period. Although key activities will be worked on simultaneously and consultation sessions are dependent on stakeholder availability, the three-stage process can be approximated within three major time periods:

- Assuming an award date and project initiation meeting in early March, we view that March to May would be primarily targeted to engage in and complete the Situational Analysis for the State.
- We view June to August as the Assessment of Options stage primarily (yet recognize the availability challenges of summer scheduling with key stakeholders' travel and potential vacation schedules). At the conclusion of this phase, we would develop a summary document and presentation for delivery at the annual Governor's Conference on Tourism in September. We see this event as an opportunity to acknowledge and thank all key stakeholders for their involvement to date, provide a project status, introduce emerging key findings, and communicate next steps and the timing of the final strategic plan.
- We view September to November as the timeframe to develop, finalize, complete and launch the 10-Year Strategic Plan and associated 12-Month Action Plan.

# 1. Introduction

## 1.1 Our Understanding of Your Requirements

### Overview

The state of West Virginia, via Senate Resolution 31, is requesting a study of the implementation of a comprehensive analysis and action plan to fully develop the tourism industry in West Virginia, including the future development of events, attractions and facilities.

Situated within 500 miles of 60% of the U.S. population (and 500 miles from the Canadian border), tourism in West Virginia generated an economic impact of \$4.38 billion in 2008, directly supporting 44,000 jobs. With a unique culture, history and geography, the West Virginia tourism sector represents a major opportunity for the economic growth and prosperity for the state.

Tourism is a simple proposition by definition, but in practice, quite complex. As recognized in the RFP, both tourism-related sectors and those entities which affect tourism must work together to build a cohesive plan. The interests of different regions, tourism sites and facilities, communities, the public sector and the private sector must be balanced. Tourism product development must be competitive, and occur in parallel with transportation access enhancements, economic

### **Major Opportunity**

#### **SUMMIT BECHTEL FAMILY NATIONAL SCOUT RESERVE AND NATIONAL SCOUT JAMBOREE**

This unique site will be a significant attractor for the 4.1 million youth, their families and 1.2 million volunteers in more than 300 councils who make up the Scouting movement in the United States, as well as 74,000 youth and 23,000 volunteers in Scouts Canada, most of whom are located in Ontario. Through the World Organization of the Scouting Movement, the National Scout Reserve has the potential to reach 25 million youth and adults in 161 national Scout organizations, all of whom share the values articulated by Boy Scouts of America.

The site adds tremendous potential to West Virginia's tourism product line for all markets. Moreover, the Scouting group -- scouts, families and volunteers -- can be targeted for other West Virginia tourism activities and products, such as Civil War/history/festivals, and other attractions. In addition, the site has strong potential to attract other tourism markets such as adventure tourists, leisure groups, corporate retreat and incentive travel clients if developed appropriately.

development, and sustainability. The success of West Virginia tourism over the next ten years will depend on its ability to build a tourism plan that incorporates all of these elements into a comprehensive plan that is greater than the sum of its parts: a tourism strategy that leads to measurable benefits for every region of the state, and extends beyond the tourism-related industries themselves.

InterVISTAS Consulting (InterVISTAS), a global consulting group in tourism, transportation and economic development is pleased to submit a proposal to the state of West Virginia that will not only accomplish the goals set out in the Request for Proposals, but develop a Strategic Plan that will support broader state goals for development, employment and wealth generation.

The Strategic Plan will provide a reference for informed, decision-making, and ensures that West Virginia develops a diversified and competitive tourism product, has the institutional capacity to manage it, and expands and strengthens its markets and economic opportunities.

## The Tourism Opportunity in West Virginia

West Virginia's current tourism is characterized by an abundance of unique geography, culture, music and history that is known world-wide. It currently shows most strength in the drive-in markets, with outdoor activities, city/town stays, festival/event visits, touring vacations, and cultural/historic travel as leading tourism products. It is a four season destination, with 60% of the U.S. (and Southern Ontario, Canada) market, within a 500 mile drive. Access to West Virginia is primarily provided through its seven key commercial airports (with Yeager Airport in Charleston as the largest), and via seven Interstate highways.

### Major Opportunity

#### FOUR-SEASON TOURISM

With major mountain resort centers, luxury golf resorts, diverse cities and towns, unique adventure tourism and touring experiences, historic/cultural sites, festivals and events, sports and gaming attractions, and numerous other assets, West Virginia has the potential to realize significant four-season tourism growth over the next ten years. The Strategic Plan conceived by InterVISTAS and its partners will provide the road map for West Virginia to achieve this tourism future and a strengthened and diversified economy.

Located in the world-renowned Appalachian Mountain Range, West Virginia boasts nine tourism regions, each with its own set of unique tourism products. Other tourism highlights in West Virginia include four national parks, a state park system of 36 parks and 2 rail trails, and four alpine skiing resort locations. Of significance, West Virginia will also be home to the National Scout Reserve, and beginning in 2013, the permanent site of the National Scouts Jamboree.

In our preliminary review of West Virginia tourism products and services, we found that there is a tremendous potential to be unlocked in each type

of tourism experience, whether it be regional, outdoor, festivals and events, or cultural/historical tourism.

Our approach to how this can be achieved is summarized below, and detailed in Section 3. Our aim will be to develop a ten year plan that both protects and expands current markets and develops new short and long haul markets. This will be achieved by creating inter-related regional and product-specific tourism development and marketing strategies. These strategies build outwards from existing inventory and infrastructure to create new tourism offerings, packages and experiences to a wider range of potential tourists.

For illustration, we have briefly highlighted two examples of major opportunities we have identified as having great tourism development potential for West Virginia: the Summit Bechtel Family National Scout Reserve and National Scout Jamboree and an overarching four-season tourism approach for the state. Our planning will be enhanced by a comprehensive analysis of current infrastructure and facilities, key tourism markets, available capital, air and road access, and the creation of a renewed air service development strategy.



## The InterVISTAS Approach

The business of tourism has become increasingly more sophisticated and competitive over the last decade, and conventional approaches to tourism planning are no longer sufficient. Reviewing external factors, West Virginia tourism must respond to new market opportunities, increasingly knowledgeable travellers and shifts in desired experiences and in the price/value proposition. Internally, it must deal with increased competition as greater numbers of local and regional governments in the United States and around the world, are recognizing – and actively seeking – the many benefits provided by tourism dollars.

The most critical elements that distinguish one tourism location from another are the history, culture and people: and in these assets, West Virginia has few equals. Its successful tourism plan must not only sustain the unique qualities of its regions, but ensure that the tourism products express the true essence of the state.

InterVISTAS has the experience and expertise to accomplish this complex task effectively, efficiently and successfully. We will use our extensive tourism experience in the U.S., Canada and worldwide to inform our work with our partners, and develop a clear and measurable set of steps needed to achieve the 10-year plan. We will use research, evidence and our greatest resource - extensive local consultation - to determine the best courses of action, and not presuppose any answers. We will listen to the people and government of West Virginia to be certain that the plan doesn't work only on paper, but works for and in, every community.

To do this, we have assembled a team of specialists from the U.S. and Canada who have been selected specifically for this project. Using a combination of senior core InterVISTAS staff and carefully chosen expert partners, we offer unrivalled expertise that extends beyond the conventional requirements of a strategic tourism plan. Core competencies include tourism and transportation, strategic planning, tourism marketing, development economics, research, benchmarking and analysis, air route development, financing and public/private partnerships.

These experts will be backed by a Project Management Team that will not only organize and drive the project to its successful conclusion, but will work with the Steering Committee and the Division of Tourism to address issues in real time, and to add a level of unprecedented quality assurance and oversight to every stage of the strategic tourism plan.

## A Three Stage Process

We propose a three stage process. The first, a ***Situational Analysis***, will use state-wide consultations, competitive analyses, literature reviews, benchmarking, product inventory/capacity utilization, and analyses of Strengths, Weaknesses, Opportunities, and Threats (SWOT) to provide a 360-degree picture of the current tourism environment, including tourism products, transportation and tourism infrastructures, competition, tourism market health, the enabling environment (labor force, government policies/regulations, taxation, etc.), traffic patterns, capacity, utilization and economic impacts.

The second stage, the ***Assessment of Options***, will identify, in collaboration with stakeholders, the options that offer the greatest 10-year potential for increased and incremental visitations by type of product/experience, by tourism region and by travel market sector. This assessment will also include a comprehensive risk analysis.

The third and final stage is the creation of the **Strategy and Action Plan** which will

- Identify key measures to be taken by the public and private sector to enable and enhance tourism development
- Provide a detailed map of the tourism products and product mix identified and developed, by type of product and by region
- Identify the elements required to support tourism development, including human resources, transportation access, destination marketing plans, financing strategies, etc.
- Result in an implementation plan that provides a road map for the ten year plan, including an on-going tracking and evaluation system to revise and adjust the plan based on new travel patterns and opportunities as they emerge.

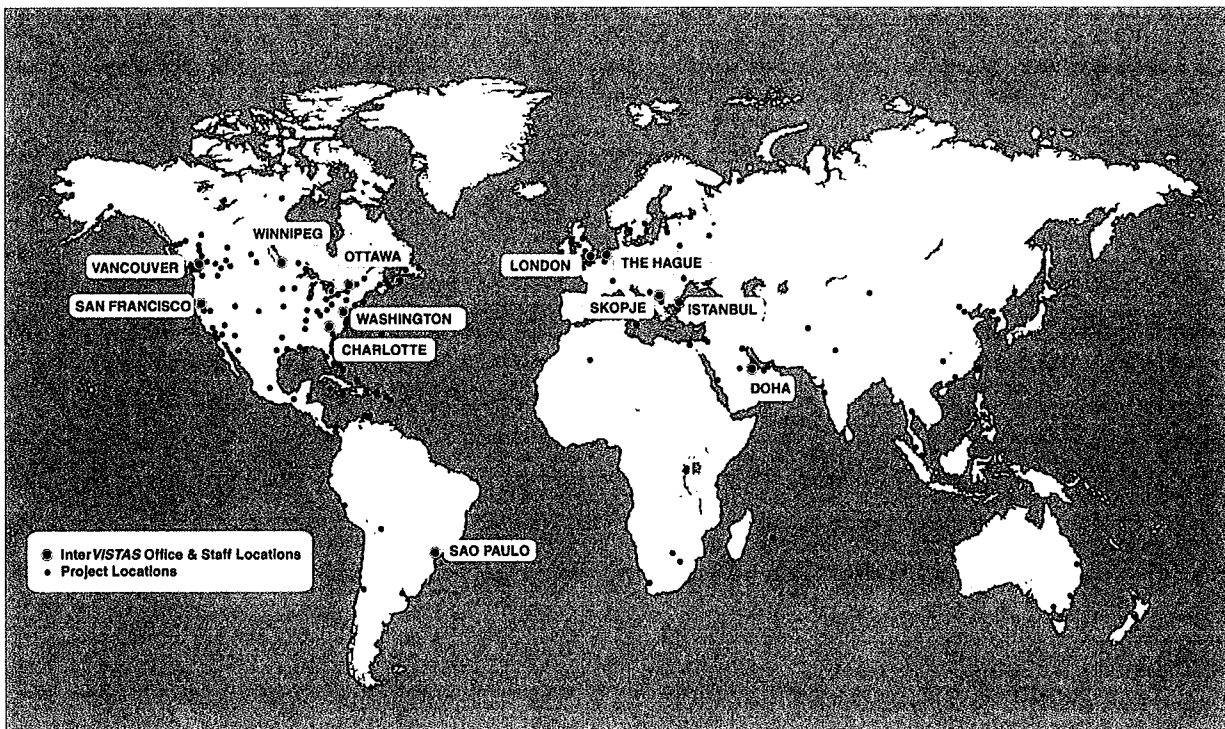
With its expertise, experience, quality assurance and insight, InterVISTAS and its partners will deliver a Strategic Tourism Plan for West Virginia that works across all sectors, at every level of granularity to drive successful outcomes, for businesses of all sizes, for communities, for the people, and for the state.

## 2. Related Experience and References (Qualifications)

The consulting team has completed tourism projects world-wide for a wide variety of clients including national governments, state governments, tourism departments of government, tourism associations, national and regional destination marketing organizations, and regional and city planning departments, airlines, and tour operators.

### 2.1 InterVISTAS Consulting Group

The InterVISTAS Consulting Group ("InterVISTAS") is a leader in consulting services in the tourism and transportation sectors. Among the company's core competencies are tourism strategic planning, tourism business development economic and regulatory analysis, market research and analysis, and air service development. InterVISTAS has completed more than 1,500 projects with over 250 clients in more than 40 countries worldwide. We have offices and personnel in Washington, D.C., Charlotte, San Francisco, Vancouver, British Columbia, Ottawa, Ontario, Winnipeg, Manitoba, Brazil, the UK, the Netherlands, Croatia, Turkey and Qatar. These offices and staff locations provide InterVISTAS with strong international reach and perspective.



The InterVISTAS Consulting Group is comprised of several integrated companies that provide a range of services to the world-wide travel and tourism industry. Within the U.S., InterVISTAS operates through InterVISTAS Consulting LLC, located in the Washington, D.C. suburb of Bethesda, Maryland. InterVISTAS provides services to clients in the areas of international and domestic air service development, travel and tourism marketing, security and border facilitation,

international transportation policy, and a wide range of related services. InterVISTAS has a professional staff of 65 people, and has averaged \$12 million in billings each year over the past five years.

The InterVISTAS Consulting Group has its primary offices in the United States (Washington, DC); Canada (Vancouver BC); The Netherlands (The Hague) and the United Kingdom (London). For over 30 years, InterVISTAS professionals have successfully provided government and commercial clients with expertise in all key areas necessary for the successful completion of transportation and tourism assignments.

InterVISTAS' Washington, DC/Bethesda, Md. office is staffed with transportation, tourism, and economic development professionals. In addition, this office is the focal point for the firm's active involvement in air service marketing (passenger and cargo) for airports and communities throughout the U.S. It is also fully equipped to perform related economic, regulatory and policy development. Further balanced with a strong expertise in tourism development, InterVISTAS is well positioned to provide strategic guidance and implementation over a broad range of transportation-related efforts.

A complete company profile with additional information about InterVISTAS can be found in **Appendix B.**

## 2.2 Our Partners

### 2.2.1 ViTAL Economy

The ViTAL Economy Alliance is a for-profit social enterprise with a mission and purpose to not just provide consulting resources to regional economies but rather teach community leaders how to take stewardship and management of their economy. This is accomplished through the knowledge transfer process by which ViTAL Economy Alliance members are embedded in the community during an initiative, counselling and advising hundreds of community and business leaders on the use of the tools and processes. Since 1992, members of the ViTAL Economy Alliance have guided regional economies in 43 states and three countries to a brighter future using a proven blueprint, The VE Journey. The results of providing years of business, economic, change management and leadership skills has created billions of dollars in new, sustainable economic growth, hundreds of high performing businesses and the creation of thousands of high wage jobs. Additional information on ViTAL Economy can be found in **Appendix C**.

### 2.2.2 Management Analysis, Incorporated (MAI)

Over the past 35 years, MAI – as an economic development and tourism master planning firm - has served a wide range of government and private sector clients in in all 50 states, five of six U.S. Territories and numerous other foreign countries. With headquarters in Vienna, Virginia, MAI has delivered high quality research and solutions for issues current governments are facing today. The company's services have aided governments in evaluating and developing policies, prioritizing investments in infrastructure, planning for new and emerging industries and maximizing opportunities to leverage public-private partnerships.

MAI recently completed a project in efficiency, productivity and revitalization for a nationally-known art center in the City of Alexandria (Virginia). In West Virginia, MAI was hired by the U.S. Army Corps of Engineers to complete a study of all of the recreational areas and boating facilities under its jurisdiction. The firm also prepared guidelines for the operation of a number of these facilities for the Corps. See **Appendix D** for additional information on MAI.

### 2.2.3 Delcan

Delcan is a global firm that has successfully delivered systems and infrastructure solutions for transportation projects in over fifty countries around the world. Over more than 50 years, Delcan has provided the highest calibre of traditional planning and engineering services, while also being at the forefront of innovation in technology and management solutions. As management consultants, Delcan advises top decision makers in the infrastructure and transportation sectors on strategy, technology, program & project management, asset management, and finance & economics. Delcan will contribute to the project team from its Vienna, Virginia office, yet where required, will also liaise with additional infrastructure specialists in its 8 other U.S. locations, or via its 17 international offices.

## 2.2.4 West Virginia University Bureau of Business and Economic Research (BBER)

Founded in 1949, the West Virginia University Bureau of Business and Economic Research (BBER) is the state's leading economic research center. With five Ph.D. economists and demographers, along with master level economists and graduate/undergraduate research assistants, BBER conducts research in the following areas:

- Economic development and impact studies
- Economic forecasts for West Virginia, regions of the state, and specific sectors
- Industry studies including tourism, bioscience, energy, wood products, and chemicals
- International exports
- Labor market studies
- State and local public finance
- Public policy studies
- Strategic planning in collaboration with the WVU Center for Executive Education

BBER publishes its work on its website [www.bber.wvu.edu](http://www.bber.wvu.edu) and through regular publications such as the West Virginia Business and Economic Review and the Morgantown MSA Monitor. BBER is the lead agency in West Virginia for the Federal-State Cooperation on Population Estimates, a program of the U.S. Bureau of the Census.

BBER collaborates with other faculty within the College of Business and Economics on sponsored research programs. The College has also launched a new hospitality management program in collaboration with key leaders of the West Virginia hospitality and tourism industry.

Additional information on BBER can be found in **Appendix E**.

## 2.3 Consulting Team

To undertake this project, InterVISTAS has assembled a uniquely qualified consulting team, with extensive experience and expertise in tourism and tourism strategic planning. The assigned team has been selected to provide the state of West Virginia with a high value combination of experience and resources in order to complete the program within the timeline provided in the RFP.

A project management organization chart showing team member roles is provided on page 19 followed by a brief description of the experience and expertise of each member. The curriculum vitae of each of the consulting team members for the project can be found in **Appendix A**.

### **Paul Clark, Vice President, Destinations & Customer Experience, InterVISTAS Consulting (Project Leader and Destination Strategy Specialist)**

Paul Clark has more than 20 years international management experience in the tourism and transportation industries, specializing in strategic planning and market development. He has developed business solutions for national and regional tourism bodies, mountain recreation resort resorts, city destination marketing organizations, tour operators, travel agencies and airport management groups. He has worked in tourism and travel projects for organizations based in the United States, Puerto Rico, Canada, the Dominican Republic, St. Martin/St. Maarten, the Canary Islands in Spain, Australia, New Zealand, Chile, India and China. As Director of Research and Strategic Planning for Tourism Whistler, he worked closely with Intrawest on tourism development and marketing for their Whistler-Blackcomb and Mont Tremblant operations. He recently returned to InterVISTAS from Tourism British Columbia where he was on a 2-year executive secondment developing international tourism strategies for the host destinations of the 2010 Vancouver Winter Olympic and Paralympic Games.

### **Steve Martin, Senior Vice President, Economics and Strategic Services, InterVISTAS Consulting (Deputy Project Leader and Economic Development Specialist)**

Steve Martin directly manages InterVISTAS' Development Economics and Environment groups, and is located in the Washington DC/Bethesda, Maryland office. He provides management oversight of regulatory impact assessments, economic impact studies, forecasting, development economics projects, and environmental services. He was the Principal Investigator of a project for the Transportation Research Board (TRB) of the National Academies relating to passenger air service development in smaller U.S. communities. Prior to joining InterVISTAS, Steve served as Assistant Director at the U.S. Government Accountability Office (GAO). Building on that experience and GAO's reputation for accuracy, integrity, and reliability, Steve oversees the practice's quality assurance functions.

### **Paul Ouimet, Executive Vice President, InterVISTAS Consulting (Strategic Advisor and Tourism Strategic Planning Specialist)**

Paul Ouimet is one of the founding partners at InterVISTAS and has played a major role in developing the firm's strategic planning practice in the tourism and transportation sectors. Among numerous tourism assignments, he was retained by the Puerto Rico Tourism Company to complete a comprehensive 10-year strategic plan to develop Puerto Rico's tourism and transportation industries. In this major economic development initiative, he provided ongoing senior-level guidance to Puerto Rico's government, its tourism division, and all tourism and transportation stakeholders for nine years (2001-2010).

**Dr. Tom Witt, West Virginia University Bureau of Business and Economic Research  
(Strategic Advisor on Tourism's Role In West Virginia's Economy)**

Dr. Tom S. Witt is the Director of the Bureau of Business and Economic Research (BBER) in the West Virginia University College of Business and Economics. Dr. Witt's research spans the areas of regional economics, public finance and policy, economic development, and energy economics. He has co-authored and edited two books, *West Virginia in the Nineties: Policies for Economic Progress* (WVU Press) and *Power From the Appalachians* (Greenwood Press) and has numerous economic publications in academic journals and research monographs.

**Dr. Michael Tretheway, President, InterVISTAS Consulting (Strategic Advisor in Tourism Economics)**

Dr. Tretheway is President of InterVISTAS Consulting Inc., and Executive Vice President and Chief Economist with InterVISTAS Consulting Group. He is a world-renowned economist, and is a sought-after speaker and advisor to tourism and transportation entities worldwide. His key areas of expertise include:

- Tourism economic impact, cost benefit and multiple accounts analysis
- Forecasting
- Airport economics
- Airport business planning and financing
- Destination marketing

**Frank Knott, Founder, ViTAL Economy (Strategic Advisor in Community Economic Development)**

Frank Knott founded ViTAL Economy in 1992 to provide a structured, yet flexible approach for underperforming rural communities to achieve economic, social and environmental prosperity. VE has served more than 40 regions throughout North America and Australia, helping regions build locally-led, sustainable community economic development initiatives that would make them winners rather than victims of the global economy. Frank Knott has overseen the development of tourism strategies as part of comprehensive community economic development initiatives in locations such as Washington State, California's Coachella Valley, Wisconsin, Southern Illinois, New England, Nova Scotia and British Columbia, Canada, and in Tasmania, Australia.

**Jim Haguewood, ViTAL Economy (Community Economic Development Specialist)**

Jim Haguewood has broad expertise and experience in the tourism industry in three areas; restaurant ownership, community tourism leadership and tourism economic analysis. Jim Haguewood was the Executive Director of the Clallam County Economic Development Council leading an award winning and nationally recognized asset based regional economic development initiative called "Clallam networks." This initiative included a tourism component providing analysis and tourism strategic planning for regional gateway economies with the north Olympic Peninsula acting as a major entry point to Vancouver, Canada and a National Heritage Park, The Olympic National Park. This strategy also included how tourism can be linked to other regional economic sectors such as agriculture to drive product sales and economic value.



**Mark Madsen, VITAL Economy (Community Economic Development Specialist)**

For the past 18 years Mr. Madsen has been providing community & economic development and management consulting services. Those services include management of complex real estate development and construction projects; business management and economic analysis; community and economic development; entrepreneurial training and mentoring; and tourism product development. He has worked extensively with Native American and First Nations communities, where he was extensively involved through the Affiliated Tribes of Northwest Indians (ANTI) to develop regional collaboration for tribal tourism. Mr. Madsen served for four years on the board of directors of the Port Angeles Regional Chamber of Commerce.

A member and Chief Economist of the VITAL Economy Alliance, Mr. Madsen is currently facilitating economic community and develop initiatives in Southern Illinois (Connect SI), Maine (Mobilize Maine) and Vermont.

From 2005 through 2008 Mr. Madsen served the City of Port Angeles as City Manager, and holds BS, MS, and PhD. degrees in Economics. He has taught business and economics courses at Utah State University where he helped design a new master's degree program in Community & Economic Development at the request of then Governor, Mike Leavitt. Mr. Madsen taught Economic Development courses at Oklahoma State University while on a National Endowed Fellowship from the USDA.

**Jacqueline Kuehnel, Associate Consultant, InterVISTAS Consulting (Tourism Product, Travel Trade and Market Development Specialist)**

Ms. Kuehnel is a tourism marketing consultant with 25 years of executive travel industry experience in tour operations and tourism product development. She also specializes in the lucrative Canadian outbound travel market, and advises clients worldwide on business development strategies in this market. In addition, she consults on climate change and corporate social responsibility topics, and is a published academic researcher on corporate social responsibility for outbound Canadian tour operators.

**Lynn Knight, Management Analysis, Incorporated (MAI) (Tourism Strategic Planning and Tourism Product Specialist)**

A resident of the state of Virginia who has lived in New York, California and Saipan, Lynn Knight has 30 years of experience in tourism, economic development and integrated communications. Her professional experience in tourism includes hotel and tour company management, market research, trends and issues analysis, economic valuation of the industry, strategic business and industry-wide planning, site selection and development of new tourism businesses, improvement and revitalization of tourist sites, special events, destination promotion, and industry advocacy. Throughout her career, she has effectively promoted public-private partnerships between government, non-profit and private sector stakeholders to support tourism and general economic development.

**Dr. Richard Mudge, Vice President, Delcan (Transportation Access Specialist – Road Networks)**

Dr. Mudge is a recognized expert in the economics and finance of all modes of transportation. He has held a series of management positions as a transportation consultant. These include co-founder, President, and Chairman of the Board for Apogee Research. Previously he directed the transportation policy group for the Congressional Budget Office and worked in applied research at the RAND Corporation. He currently serves as Vice President for Delcan and helps to lead the firm's work in economics, finance, technology and strategy.

Dr. Mudge's consulting clients are usually decision makers, whether from public agencies or private firms. Much of his work covers technology -- including the development of market forecasts and business strategies. Dr. Mudge's work often involves the changing market place for transportation, including forecasts for future markets. When prepared for public sector clients, they usually assess the economic and social impacts. When performed for the private sector, they incorporate forecasts of profits and return on investment as well as competitive market assessments.

**Solomon Wong, Senior Vice President, Borders, Security & Planning, InterVISTAS Consulting (Policy and Land Use Specialist)**

Solomon Wong is the lead consultant for InterVISTAS' planning group. In this capacity, he leads multi-disciplinary teams to develop integrated solutions in the field of transportation. From building business cases for new concepts, to developing improved processes, Mr. Wong has built a solid reputation for the development of out-of-the-box strategies and solutions. Partnerships built for public/private sector interests from Mr. Wong's work have increased customer satisfaction and opened new market and revenue opportunities for clients. Mr. Wong is an urban planner by training and has worked on facility and master plans for transportation facilities throughout the world.

**John Weatherill, Senior Vice President, Route Development, InterVISTAS Consulting (Air Service Development Specialist)**

As Senior Vice President, Route Development at InterVISTAS Consulting, John Weatherill holds responsibility for the management of air service development projects in the U.S., Canada, Europe, Asia, and the Middle East. Mr. Weatherill has extensive experience in strategic airline route planning, market share modelling, route profitability forecasting and airport incentive package development. He has represented airport clients in air service presentations and incentive negotiations with airlines throughout the world.

**Howard Mann, Vice President, Policy and Market Analysis, InterVISTAS Consulting (Policy and Air Service Development Specialist)**

Howard Mann is a specialist in bilateral government policy, passenger/border/security facilitation, and in air service development. Prior to joining InterVISTAS, he served with ACI-NA where he worked extensively with U.S. and Canadian airport members on a wide variety of issues including bilateral air service policy, domestic air service and passenger facilitation. Mr. Mann served as key liaison to U.S. and Canadian airports on ACI-NA's JumpStart program, U.S. passport and visa policy, U.S.-VISIT and various other CBP Issues. Mr. Mann has also worked with the U.S. Department of State, U.S. Department of Transportation and U.S. Department of Homeland Security on numerous occasions.

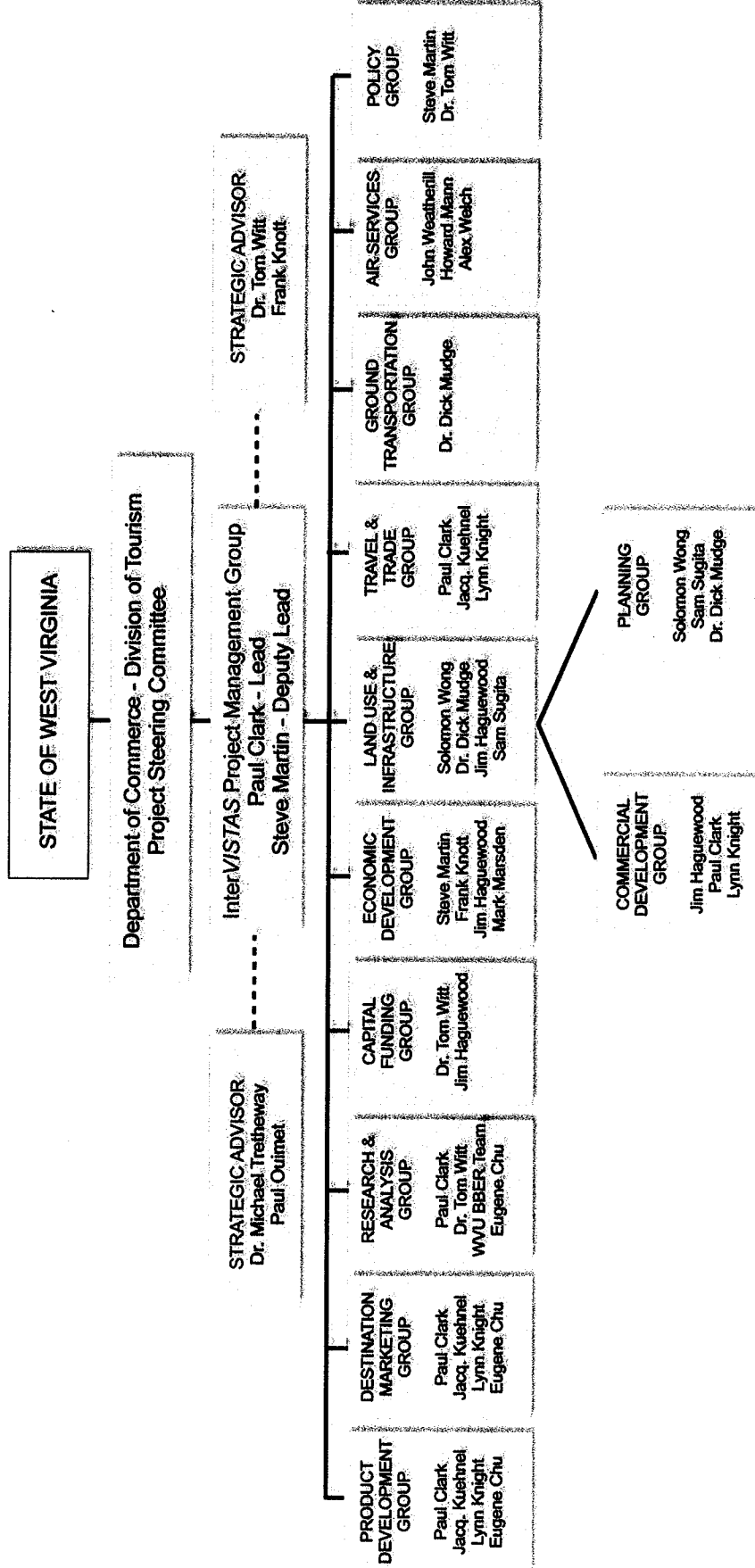
**Eugene Chu, Senior Project Manager, InterVISTAS Consulting (Tourism Specialist)**

Eugene Chu has over seven years of experience in the tourism and transportation industries, specializing in strategic planning, tourism development and economic impact assessment. Mr. Chu has been involved in a wide range of consulting assignments and projects at InterVISTAS, completing work for government and private sector clients in the U.S., Canada and the Caribbean.

**Sam Sugita, Senior Analyst, InterVISTAS Consulting (Land-Use and Planning Specialist)**

Samuel Sugita provides land use and transportation planning solutions to a variety of public and private clients. He has a strong foundation in community and regional planning. He has completed a wide array of land use planning, urban design and transportation planning projects in the United States and Canada. Mr. Sugita has worked on master plans, general/community plan updates, design guidelines and development standards for communities and resorts. This includes Southern California Association of Governments - Compass Blue Print Demonstration Projects, resort and community development for Lake Elsinore, Big Bear and Mammoth Lakes, as well as other plans for communities in Southern California.

Figure 2-1: Project Management Chart



## 2.4 Recent Relevant Projects

Over the years, InterVISTAS and its partners have developed numerous tourism strategic plans and economic development plans for countries, states, regional economies, cities and towns, and private sector operators. The projects detailed in this section have been selected based on:

- Their relevance to West Virginia and West Virginia's tourism strategic planning assignment
- Their demonstration of the overlapping and complementary skill sets possessed by InterVISTAS and its partner firms
- The overlap of personnel on these projects, and those on the West Virginia project team
- Demonstrable success in achieving clients' goals

PROJECT NAME & LOCATION	
<b>2010 Vancouver Winter Olympic &amp; Paralympic Games: Tourism &amp; Economic Development Leveraging Plan, Province of British Columbia</b>	
Client Reference & Contact Information	
Raymond Chan, Assistant Deputy Minister, Ministry of Tourism, Trade and Investment, Government of British Columbia, Tel: 1-250-387-6826, <a href="mailto:Raymond.Chan@gov.bc.ca">Raymond.Chan@gov.bc.ca</a> , Box 9809 STN PROV GOVT, Victoria, BC, V8W 9W1, Canada	
Type of Project	
While on a 2-year executive secondment to Tourism British Columbia (a provincial government tourism agency), Paul Clark directed all sales and marketing programs that profiled British Columbia (BC) tourism destinations via co-operative campaigns with Olympic-related groups such as organizers and sponsors. Campaigns included: exclusive use of BC tourism footage to showcase Olympic sponsor Panasonic's HD TV products in international trade and consumer shows; use of BC tourism footage and thematic backdrops for the Coca-Cola Pavilion venue during Games.	
Goals & Objectives	
<p><b>Goal/Objective:</b></p> <p>Tourism British Columbia sought to maximize exposure and the economic development opportunities of its province-wide tourism destinations by leveraging the world-wide attention focused on the 2010 Olympic and Paralympic Games.</p>	<p><b>Successfully met by:</b></p> <p>The International Olympic Committee stated in their formal post-Games assessment that the promotional leveraging conducted by the 2010 host tourism destinations resulted in the most innovative campaigns and greatest ROI ever experienced in Olympic history. More than 3 billion TV and online viewers, and 250,000 games-time visitors, saw extensive BC and national tourism promotions featured within key pre-games and games-time programming. International visitor arrivals to BC in 2010 have grown 4% YTD over last year (outstripping the national average), with recent research indicating games-related campaigns as a significant contributor to the increased visitor demand. Additionally, Canada leveraged the tourism development aspect of the Games nationally and internationally, and was given the world's No. 1 Country Tourism Brand annual award from FutureBrand of New York in November of 2010.</p>

### Relevance to West Virginia Strategic Tourism Plan

- Development of a major tourism strategic plan and marketing plan for a Canadian province that possesses numerous similarities in its tourism products – four season mountain recreation resorts, adventure tourism, touring products, unique city/town destinations, historic/heritage/cultural sites, etc.
- Building comprehensive tourism plans from marquee/legacy events (e.g. the Greenbrier PGA Tour event)
- New market expansion
- Leveraging a broad and integrated regional development strategy from a few key tourism sites
- Use of traditional and new media channels
- Measuring and monitoring strategies and campaigns to develop ROI assessments

**PROJECT NAME & LOCATION**

**2010 Vancouver Winter Olympic and Paralympic Torch Relay – Strategic Plan to Highlight All Tourism Regions (2009-2010)**

**Client Reference & Contact Information**

Raymond Chan, Assistant Deputy Minister, Ministry of Tourism, Trade and Investment, Government of British Columbia, Tel: 1-250-387-6826, [Raymond.Chan@gov.bc.ca](mailto:Raymond.Chan@gov.bc.ca), Box 9809 STN PROV GOVT, Victoria, BC, V8W 9W1, Canada

**Type of Project**

While on executive secondment to Tourism British Columbia, Paul Clark also created and directed a strategic plan via social media to highlight provincial tourism attractions located around the route of the Olympic and Paralympic Torch Relays. Online viewers experienced 48 daily videos capturing Relay events and tourism storylines. Viewers were invited to join the journey and provide ongoing input via an integrated strategy involving YouTube channels, Facebook, Twitter and partner websites. The concept was expanded to a Canada-wide scale, drawing partnerships with the Canadian Tourism Commission, the Vancouver Olympic Organizing Committee and Torch Relay sponsor, Coca-Cola.

**Goals & Objectives**

**Goal/Objective:**

Tourism British Columbia sought to showcase province-wide tourism destinations and experiences to a world-wide audience focusing on events prior to and during the 2010 Vancouver Winter Olympic and Paralympic Games.

**Successfully met by:**

The campaign generated an online community of 415,000 people in 21 countries who followed the video series across Canada and engaged in an ongoing discussion. The campaign also helped to drive 2 million online visits to Tourism BC's website from viewers seeking vacation and booking information on a wide variety of provincial destinations.

**Relevance to West Virginia Strategic Tourism Plan**

- Successful use of traditional and digital marketing methods, and social media strategies, to drive significant tourism/economic development results
- Expanding a key event into a multiple destination opportunity for all regions within a province/state-scale



**PROJECT NAME & LOCATION**

**Strategic Marketing Plan for San Antonio-Mexico, City of San Antonio**

**Client Reference & Contact Information**

Ms. Barbara Prossen, Marketing & Community Relations Director  
 Aviation Department | City of San Antonio  
 Tel: 210-207-3450 / Email: barbara.prossen@sanantonio.gov

**Type of Project**

InterVISTAS was retained to develop a plan to establish the City of San Antonio, Texas as Mexico's preferred global destination for commercial, cultural and educational activity.

The assignment included:

- Identifying opportunities to increase Mexico-San Antonio market demand in key areas such as leisure travel, business travel and education-based travel
- Addressing the need for more San Antonio-Mexico air service options
- Developing a comprehensive strategic plan to establish and market San Antonio as a destination of choice for Mexican nationals

**Goals & Objectives**

**Goal/Objective:**

The Mexico market appeared to be a strong natural market for San Antonio yet the numbers did not bear this out. Community leaders believed that there were major awareness challenges. An initiative to increase demand across the entire San Antonio economy with Mexico was launched. It was led by a broad-based, public-private partnership spearheaded by community champions.

**Successfully met by:**

A comprehensive plan was developed for San Antonio with over 100 specific initiatives to build the Mexico market across all key sectors of the economy, including tourism. The plan was endorsed by the Mayor of San Antonio and the Mexican Ambassador.

**Relevance to West Virginia Strategic Tourism Plan**

- Development of a successful multi-sector, public-private economic development process at an approximately equivalent population scale (the City of San Antonio has a population base of 1.4 Million residents while the State of West Virginia has 1.8 Million residents)
- Added additional large-scale city destination marketing/convention and visitors bureau experience to an extensive track record, which can be applied to the West Virginia CVB sector (San Antonio is now the 7<sup>th</sup> largest city in the U.S.)

- Development of new public-private sector partnerships
- Development of niche high-yield travel segments and economic development opportunities such as educational travel, medical travel, and two-nation investor travel
- Comprehensive and successful stakeholder and community engagement plan
- Building under-developed drive markets

**PROJECT NAME & LOCATION**

**Tourism and Transportation Strategic Plan & Program Updates for Puerto Rico (2003-2010)**

**Client Reference & Contact Information**

Mr. Jose Suarez, Former Executive Director  
 Puerto Rico Tourism Company | La Princesa Building #2 Paseo La Princesa  
 Old San Juan, P.R. 00902  
 Telephone: 1-787-721-8500

**Type of Project**

InterVISTAS was responsible for developing and overseeing implementation of both the overall strategic plan and the air service strategic plans for the Puerto Rico Tourism Company (PRTC), and has since provided comprehensive updates to each plan. Included in the implementation was the coordination of the stakeholder partnership group, managing the steering committee, and coordinating airport, tourism and government funding for new tourism development and air route incentives.

InterVISTAS completed 3 detailed reviews:

- Tourism and transportation trends and their economic impact on Puerto Rico
- Situational analysis reviewing infrastructure and key tourism product offering nationally
- Competitive analysis relative to other major destinations and their key markets

**Goals & Objectives**

**Goal/Objective:**

The Puerto Rico Tourism Company retained InterVISTAS to develop a comprehensive strategic plan to develop their tourism industry. Puerto Rico was facing fierce competition from other Caribbean destinations, and travel was down dramatically following 9/11 and in subsequent years. A new approach was needed to bring government officials and industry leaders together to develop and agree upon a new long-term strategic plan.

**Successfully met by:**

InterVISTAS developed a new strategic plan which was officially endorsed by the Governor of Puerto Rico and strongly supported by the tourism industry. As a result of the plan, Puerto Rico has seen strong gains in the tourism economy and economic development generally. InterVISTAS also secured increased airline seat capacity by over 12%, significantly higher than the U.S. average rate at that time. Additionally, our work facilitated the development of new air services to Puerto Rico from several airlines such as Air Tran, American, Continental, JetBlue, Spirit, United and US Airways to new markets including Atlanta, Boston, Los Angeles, New York, Washington, Orlando, and Fort Lauderdale, among others.

### Relevance to West Virginia Strategic Tourism Plan

- Major public-private stakeholder consultation process and partnership program to develop long-term tourism development and economic development strategies
- Tourism development plan produced in concert with a transportation access plan, and with associated recommendations on infrastructure, policy, land-use, and commercial development as an economic and tourism product enabler

**PROJECT NAME & LOCATION**

**Olympic Peninsula Tourism & Economic Development Strategy,  
Washington State (2000-2005)**

**Client Reference & Contact Information**

Tom Keegan, President, Peninsula College  
 1502 E. Lauridsen Blvd.  
 Port Angeles, WA 98362  
 Ph: 360-417-6200  
 Email: [tomk@pcadmin.ctc.edu](mailto:tomk@pcadmin.ctc.edu)  
 (Former President of Clallam County Economic Development Council during project)

**Type of Project**

Clallam County and the north Olympic Peninsula tourism industry was a contributor to the region's economy, yet had unrealized market potential to be a more significant economic engine. VITAL Economy expanded the region's traditional view of tourism as a visitor attraction strategy to one where tourism became a driver of additional economic value in linking visitors to the region's unique indigenous products. Strategic industry sector linkages were developed in this economic development project and included healthcare, agriculture, eco-tourism, Native American culture and events and festivals. Specific opportunities were identified in international tourism market development, lifestyle packages, regional branding and marketing strategies. The opportunities were valued at \$180M based on expanding the spending of 3 million tourists by \$60/day.

**Goals & Objectives**

**Goal/Objective:**

To significantly increase the economic diversity and value of tourism by linking visitors to the region's unique indigenous products and experiences.

**Successfully met over the 5 year program by:**

Transforming a 30-year distressed economy to one with a 2% lower unemployment rate than the State average at the time, Clallam County emerged from the economic development initiative with the lowest unemployment rate in 34 years.

- Total wages increased by over \$326M.
- Retail sales increased by 35% in four years – a value of \$232M
- Average wage rates in the north Olympic Peninsula grew significantly despite a weak State of Washington economy at that time.

### Relevance to West Virginia Strategic Tourism Plan

- Transformation and diversification of a state economy at a regional and county level, positively impacting urban and rural tourism destinations in a sustained manner
- Creation of new attractions, festivals and events, and tourism packages to re-invigorate and enhance the visitor experience within a state

### 2.4.1 West Virginia Tourism and Economic Development Projects

In addition to the 5 key project examples noted, our partners at the Bureau of Business and Economic Research (BBER) within West Virginia University have more than 40 years of project work conducting tourism and economic development studies for the state of West Virginia. The following are a listing of recent BBER tourism and economic development related studies:

- West Virginia Economic Outlook 2011- includes forecasts of the hospitality industry
- Economic Impact of West Virginia Casinos - currently in draft form as part of a larger study on the industry for the West Virginia Lottery Commission
- Tourism and the West Virginia Economy 2007 - produced for the West Virginia Division of Tourism
- Tourism and the West Virginia Economy February 2005 - produced for the West Virginia Division of Tourism
- Funding Challenges and Opportunities in a Growing Tourism Destination: The Case of Broward County

A complete list of more than 40 tourism-specific economic studies produced by BBER can be found in **Appendix E**.

## 2.5 Other Tourism and Economic Development Projects

The previous section gave several detailed examples of past projects that are directly related to the proposed Strategic Plan for West Virginia, as well as illustrating the comprehensive series of tourism and economic development projects conducted by our partners at the BBER.

The following section highlights additional project experiences related to tourism and economic development and demonstrates our core competencies in tourism strategic planning at the federal, state/provincial and city/resort levels. These areas of expertise include:

- Comprehensive strategic tourism planning projects
- Tourism marketing plans
- Tourism business development
- Long and short haul travel market studies and comparative analyses
- Real-time analysis of cross-border/air travel trends
- Detailed visitor analyses
- Market development and air route support

### 2.5.1 National-Level Projects

#### **Design of the Canada-China Tour Operator Program, Canadian Tourism Commission -**

InterVISTAS was retained to develop and finalize Canada's official tour operator guidelines under the future Approved Destination Status (ADS) Scheme with China. These guidelines set up the code of conduct and quality assurance program regulations for Canada's receptive tour operators, a critical document required by Canada and China as they develop their ADS arrangement. The ADS scheme is a unique bilateral tourism agreement between the People's Republic of China and foreign destination countries which allows Chinese nationals to travel to the destination country in a leisure group tour format. Without ADS, Chinese nationals are generally only permitted to travel to destination countries for business, study or for visiting friends and relatives. ADS also allows the designated destination country to actively market its tourism products and services in the China market. The ADS Scheme was launched by the Chinese government in 1983.

#### **Strategic Advisory Services on the Travel Trade and Consumer Markets, Canadian Tourism Commission -**

InterVISTAS was recently contracted by the Canadian Tourism Commission (CTC) as a pre-qualified specialist consultant for a period of three years. Under this standing offer arrangement, InterVISTAS has become an official advisor to the CTC, and has been retained on an on-call basis. Specifically, InterVISTAS has been contracted to provide advice on new business development opportunities for Canada within the international travel trade community and from Canada's leading inbound travel markets.

### 2.5.2 State/Provincial/Territorial Level Projects

**Tourism Master Plan for 2011-2015, Northern Marianas Islands.** Lynn Knight a project funded by a technical assistance grant of the U.S. Department of the Interior for the U.S. Commonwealth of the Northern Mariana Islands, contracted to MAI. The project involves coordination of a 12-member team in Virginia, Washington D.C., Hawaii, Japan and the islands and includes a visitor exit survey of 5 U.S. and international markets, the development of a new destination branding strategy, and a strategic master plan with specific guidelines for implementation. This effort



followed the successful completion of an earlier **5-Year Strategic Tourism Master Plan** for the Northern Marianas Islands covering the period 2006-2010. That project involved gathering input from hundreds of public and private stakeholders in the region regarding the current state and future of tourism in the islands. The report analyzed historical data and the history of tourism in the destination, trends, challenges, strengths and opportunities. It evaluated the role of the government-run Marianas Visitors Authority in promoting tourism, as well as the condition of hotel facilities and recommendations for improvements. The study analyzed transportation access and air service uncertainty. It inventoried the destination's attractions, including scenic ecotourism sites, cultural and historical sites (both ancient and related to World War II battles), land and marine-based sports, golf courses, casinos and a range of annual community events. The publication also identified opportunities to develop new attractions. The strategic plan was launched with a publication, video and presentations for public meetings, and coordination of 9 public-private committees tasked with implementation.

**Mexico Travel Market Study, Alberta Economic Development** - This project included a comprehensive analysis and assessment of Mexico's outbound travel market, and evaluated new opportunities for Alberta. The market investigation involved a detailed review of Mexico's outbound travel performance, analysis of Mexico's total outbound air services to Canada and development of specific Mexico visitor profiles. In addition, a series of extensive interviews were held with key industry stakeholders in both Canada and Mexico.

**Alberta Air Access Comparative Analysis and Monitoring** - InterVISTAS conducted a detailed analysis of the quality air access to Calgary and Edmonton versus the air access to Vancouver, Toronto and Montreal over the period 2005 through 2008 for Travel Alberta. Air access was measured using a quality of service metric that incorporates the number of stops and connections, overall travel time, and the aircraft type used on air services. The study was designed to determine whether air access to Alberta is: competitive with that of the other major Canadian airports; trending positively versus the rest of the country; consistent with the travel market demand; offers opportunity for expanded marketing efforts. InterVISTAS collected air service data from OAG and the Canadian Transportation Agency, and used the Planet airline market share models to determine the quality of air access to Alberta.

**Alberta U.S. Visitor Monitor** - InterVISTAS provided Travel Alberta with a monthly analysis of air visitors to Alberta from the United States from 2007 – 2009. The monitor is designed to provide rapid updates on travel trends ahead of the customs entry statistics provided by Statistics Canada. InterVISTAS uses information collected from the Airline Reporting Corporation (ARC) air ticket clearing house, which is used to settle all U.S. travel agency sales, to conduct the analysis. Additionally, InterVISTAS incorporates customs entry data, airline schedule information, airport enplaned/deplaned passenger statistics, U.S. DOT on flight information and OAG.

**Alberta International Visitor Analysis** - InterVISTAS developed a detailed analysis of international air visitors to Alberta from Japan, Korea, Australia, Germany, the Netherlands and the United Kingdom from 2006 – 2010 for Travel Alberta. The analysis, based on reservation information collected from the GDS systems, provides: visitor volume by both airport of origin; visitor volume by approximate city of residency; monthly travel patterns; major travel routings and gateways; year over year volume comparisons; advance purchase profiles. In addition to the

distribution system booking data, InterVISTAS incorporated information from the Statistics Canada custom entry reports and the U.K. and German Civil Aviation Authorities.

**Alberta Domestic Visitor Analysis** - InterVISTAS developed a detailed analysis of domestic air visitors to Alberta from Ontario and Quebec the period 2006 through to June 2007. The analysis, based on reservation information collected from the GDS systems, provides: visitor volume by both airport of origin; visitor volume by approximate city of residency; monthly travel patterns; major travel routings and gateways; year over year volume comparisons; advance purchase profiles.

**North America Market Development Strategy, Government of Canary Islands** - Purpose was to create a long-term market development strategy for the Canary Islands to develop the Canada and U.S. inbound travel markets. InterVISTAS worked closely with government and tourism stakeholders in the Canary Islands to determine priorities, key issues and market development initiatives. Strategy includes both air services development programs and travel trade market development initiatives including interviews and meetings with tour operators in North America and Europe.

**Abu Dhabi Route Development Support** - InterVISTAS has provided comprehensive strategic, analytical and training support to Abu Dhabi Airports Company (ADAC). The firm has prepared business cases and route forecasts for a number of successful new route wins, including Air Asia X, Thai Airways and Air France. As part of the air service development strategy preparation, InterVISTAS solicited and incorporated input from government and tourism stakeholders. The strategy involved the analysis of over 2,000 markets, and identified more than 175 viable routes.

**Houston Route Development Support** - Since 2005, InterVISTAS has been the air service development consultant for the Houston Airports, which operates George Bush Intercontinental and William P. Hobby Airport. In this period, Houston has welcomed new service from Emirates, Qatar, Singapore Airlines, EVA Cargo, China Airlines Cargo and the Continental family of airlines (Mainline, ExpressJet and Connection services). Each of the air service efforts takes into account some of the unique global connections that are attractive to Houston due to the corporate mix (oil, energy, etc.). Most recently, InterVISTAS was involved in a broad air service strategy related to Houston Bush Intercontinental shifting from a SkyTeam Hub to a Star Alliance Hub and the various air service efforts that are being adapted to accompany this change.

### 2.5.3 City/Resort Level Projects

**Strategic International Market Assessment (China and India), Rocky Mountaineer Vacations-** InterVISTAS was commissioned by Rocky Mountaineer Vacations, a division of the Armstrong Hospitality Group (AHG), to provide a strategic assessment of the emerging outbound tourism markets from China and India, and to evaluate the business opportunity for AHG. The project included consumer and travel trade research, market assessment, and interviews with tour operators and travel agents in China and India to evaluate the business potential of these emerging international markets for AHG. Focus was on the identification of high-yield markets that fit with AHG's products and services. Several strategic planning sessions were held with the senior management team at AHG. InterVISTAS provided AHG with a set of strategic recommendations to develop the market including potential tour packages, strategic international partnerships, and potential long-term investment opportunities in China and India.

**2008-2015 Strategic Plan, Tourism Vancouver** - InterVISTAS was contracted to develop a long-term strategic plan for Tourism Vancouver in its marketing and promotion of Vancouver as a city destination. This plan was developed in association with the senior management team at Tourism Vancouver and the Board of Directors, and involved multiple workshops and facilitation sessions to develop long term national and international tourism development strategies for Vancouver. The plan spans initiatives and programs from 2008-2015. As a key part of the strategic plan, a market model with detailed market-by-market growth scenarios was developed in collaboration with Tourism Vancouver. This included an identification of key supply and demand factors driving tourism growth, and requirements to achieve the market growth scenarios, to help the Province of BC reach its \$18 billion tourism revenue target for 2015. The official Strategic Plan was launched at Tourism Vancouver's AGM on May 30, 2007.

**2007-2012 Strategic Plan, Tourism Richmond** - InterVISTAS prepared Tourism Richmond's Strategic Plan 2007-2012 document based on the Tourism Richmond Board Retreat. The strategic plan included an identification and assessment of key demand and supply factors driving tourism growth in the City of Richmond, including tourism trends, socio-economic changes, government and transportation policy, and a detailed SWOT analysis to identify the opportunities and strategic issues for Tourism Richmond. An updated vision was created, along with strategic objectives and measurable targets, including recommendations and strategies to contribute to the Province of B.C.'s \$18 billion tourism revenue target for 2015.

**Five-Year Marketing Plan, Ski Banff/Lake Louise/Sunshine Village** - This project involved the creation of a detailed five-year marketing plan for the collective resorts and ski hills at Ski Banff, Lake Louise and Sunshine Village. This includes a situational analysis, market review, competitive analysis, SWOT, and development of long-term objectives and measurable targets for the resorts. Detailed market-by-market forecasts were created along with specific strategies and action plans for national and international target markets in North America, Europe and Asia, including a market tracking and program evaluation plan.

## 3. Approach and Methodology

### 3.1 Overview

The RFP recognizes the importance of experience in working with the tourism industry and key organizations in order to create a cohesive and workable tourism strategy. Specifically, this pertains to demonstrating expertise in strategic planning, product development, market development, and research and market analysis expertise for the tourism sector, as well as in other agencies, industries and entities that affect tourism.

The previous section - Related Experience and References, describes the bid team's experience working with multiple stakeholders to address a wide range of interests and concerns.

This section describes how the team will approach the work. Our process will not only create a successful Strategic Plan for tourism, but will also support the state's larger objectives, including infrastructure, access to capital, employment generation and the support of other industries.

To accomplish this, we have developed a three-stage methodology that combines the goals and objectives outlined in RFP 2.4.1 and 2.4.2, examining both the tourism-related sectors and those that affect tourism as a whole. This will allow us to provide a complete picture of all the relevant impacts on tourism, both direct and indirect, and build a tourism plan that has the buy-in and support from the wide range of stakeholders associated with tourism in West Virginia.

The three-stage plan, which is detailed in the following section, includes a situational analysis, an assessment of options stage, and the creation of the tourism strategic plan and 12-month action plan:

- The **Situational Analysis** will provide a 360-degree picture of the current tourism environment, including tourism products, transportation and tourism infrastructures, enabling environment (labor force, government policies/regulations, taxation, etc.), traffic patterns, capacity, utilization and economic impacts.
- The **Assessment of Options** will identify, in collaboration with stakeholders, the options that offer the greatest potential for sustained increases in visitation and tourism spending by type of product/experience, by tourism region and by travel market sector. This assessment will also include a comprehensive risk analysis.
- Among other key factors, the **Strategic Plan and Action Plan** will:
  - Identify key measures to be taken by the public and private sector to enable and enhance tourism development.
  - Detail the key tourism products and product mix identified as having most long-term potential, by type of product and by region.
  - Identify the elements required to support tourism development, including human resources, transportation access, destination marketing plans, financing strategies, etc.
  - Provide an implementation plan that represents a road map for the ten year strategic plan, including an on-going tracking and evaluation system to revise and adjust the plan based on new travel patterns and opportunities as they emerge.

## Plan Development

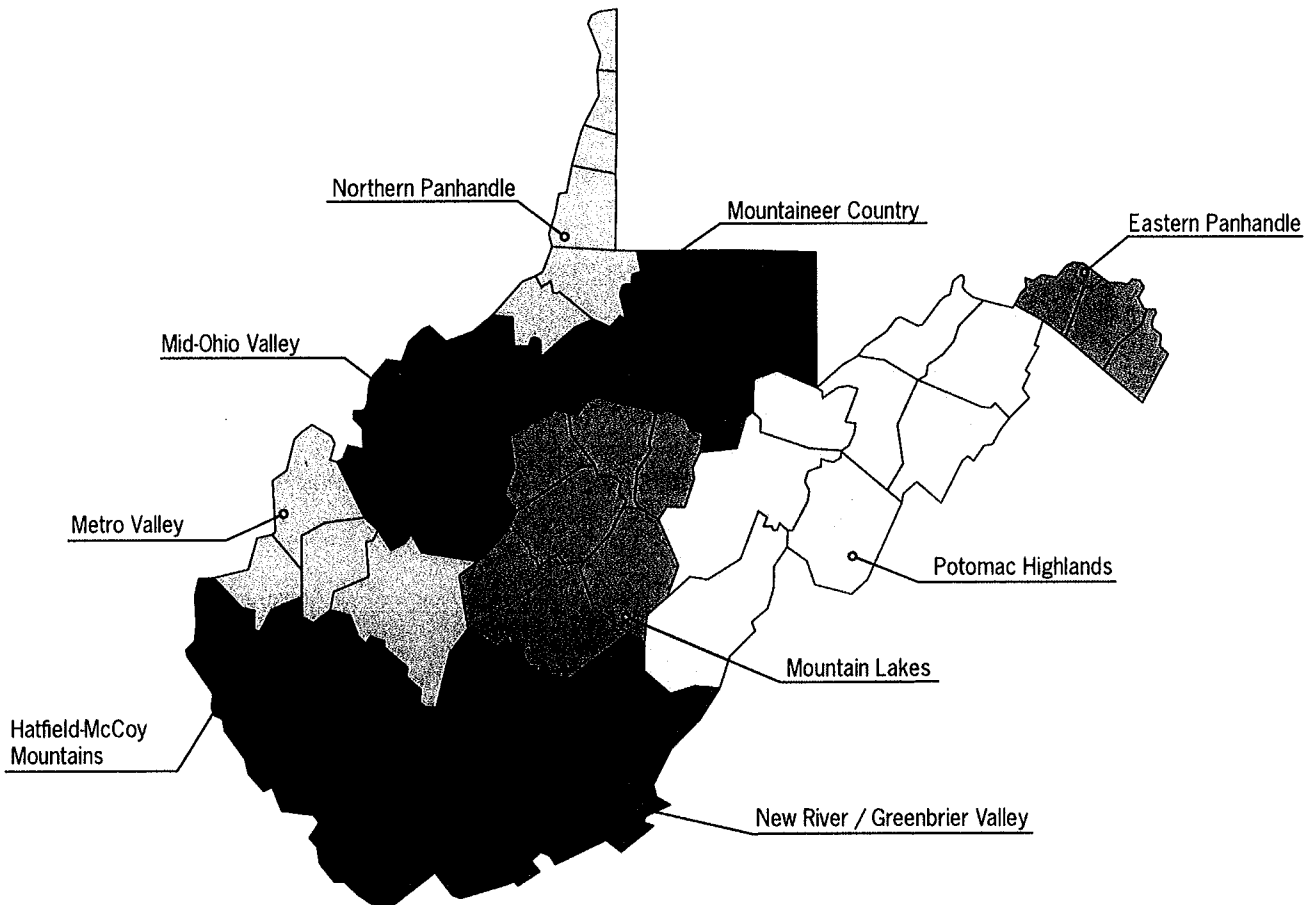
In order to establish a baseline for further work, and to build the Strategic Plan, we will draw on a number of key contacts, consultations/outreach and analysis of existing literature in our examination. We will also identify gaps to be addressed as the plan evolves.

We have identified key targets through a preliminary scan, which is intended to be expanded in consultation with the project Steering Committee. These include:

- **Analysis of current research and data** of West Virginia tourism, including, but not limited to:
  - West Virginia Official State Travel Guide Study, 2010, Destination Analysis
  - Economic Impact of Travel on West Virginia, 2000- 2008, Dean Runyon & Associates
  - Linking Tourism Resources and Local Economic Benefits: A Spatial Analysis in West Virginia, Deng & Dyre, 2009
  - Travel USA 2008 West Virginia Visitor Report, Longwoods International
  - Travel Is An Economic Engine, Power of Travel, US Travel Association
- **Analysis and measurement of previous tourism planning strategies/outcomes**
  - West Virginia Division of Tourism Marketing Plans 2010 & 2011, and other related business plans and sales plans
- **Review of product inventories, capacity analyses by product type and region**
  - **By all key tourism products e.g.**
    - Group tourism: MC&IT, tours, packages
    - Winter sports; e.g., downhill and nordic skiing, snowmobile, snowshoe touring etc.
    - Adventure sports; e.g. white water rafting, ziplines, climbing, etc.
    - Motor sports; including motorcycles, dirt bikes, ATVs, auto racing, rallies and touring
    - Hunting, fishing
    - Golf
    - Soft outdoor adventure; e.g., touring, scenic drives, camping, hiking
    - Spas and wellness centers
    - Historic Tourism; e.g., Harpers Ferry, Civil War tours, etc
    - Arts/Culture, music, performance and visual arts, culinary, festivals, museums
    - Cities and towns; shopping, festivals, dining, getaway breaks
  - **By tourism region**
    - Mid-Ohio Valley
    - Potomac Highlands
    - Northern Panhandle
    - Mountain Lakes

- Mountaineer Country
- New River/Greenbrier Valley
- Eastern Panhandle
- Metro Valley
- Hatfield-McCoy Mountains

**Figure 3-1: West Virginia Tourism Region Map**



- **Market Research and Trends**

Current and potential short and long haul markets, by:

- Mode of Transportation
- Demographics and Psychographics
- Seasonality
- Travel Trends / Demands
- Market Sector
- West Virginia visitation patterns (specific region or product/experience sought)
- Other breakdowns where required

- **SWOT Analyses**

SWOT (Strengths, Weaknesses, Opportunities and Threats) Analyses will be created as part of the Situational Analysis, and may be adapted, if required, for SWOTs by region, by tourism, product, and for the state. We have created notional and top-line SWOT for West Virginia, reproduced below, for illustrative purposes only. The SWOT components would obviously be much more extensive in the actual exercise.

STRENGTHS, e.g.,	WEAKNESSES, e.g.,
<ul style="list-style-type: none"> <li>● Distinctive culture, history and geography</li> <li>● Four season tourism</li> <li>● Wide array of tourism offerings</li> <li>● Within 500 miles of 60% of U.S. population</li> </ul>	<ul style="list-style-type: none"> <li>● Limited air access</li> <li>● Limited awareness nationally as a tourism destination</li> <li>● Limited brand recognition</li> </ul>
OPPORTUNITIES, e.g.,	THREATS, e.g.,
<ul style="list-style-type: none"> <li>● National Scouts Reserve &amp; Jamboree</li> <li>● Potential expansion of winter tourism product and related facilities</li> <li>● Emergence of the Corporation for Travel Promotion – international market leverage opportunities for West Virginia</li> </ul>	<ul style="list-style-type: none"> <li>● Competition from nearby jurisdictions</li> <li>● Lack of development funding</li> <li>● Continued low visitor volumes generally due to ongoing weakness in the national economy and low consumer confidence levels overall</li> </ul>

- **State priorities and strategies for economic development, through a tourism lens**

As tourism is a key part of West Virginia’s ongoing economic development planning, we will incorporate the West Virginia “Open For Business” four pillars as a guide tourism planning. This will help build the linkages between tourism and other sectoral planning exercises and are:

- *Being Global/Acting Local*

- *Growing Skills*
- *Small Business is Big Business*
- *Financing Development*

- **Consultation and Outreach**

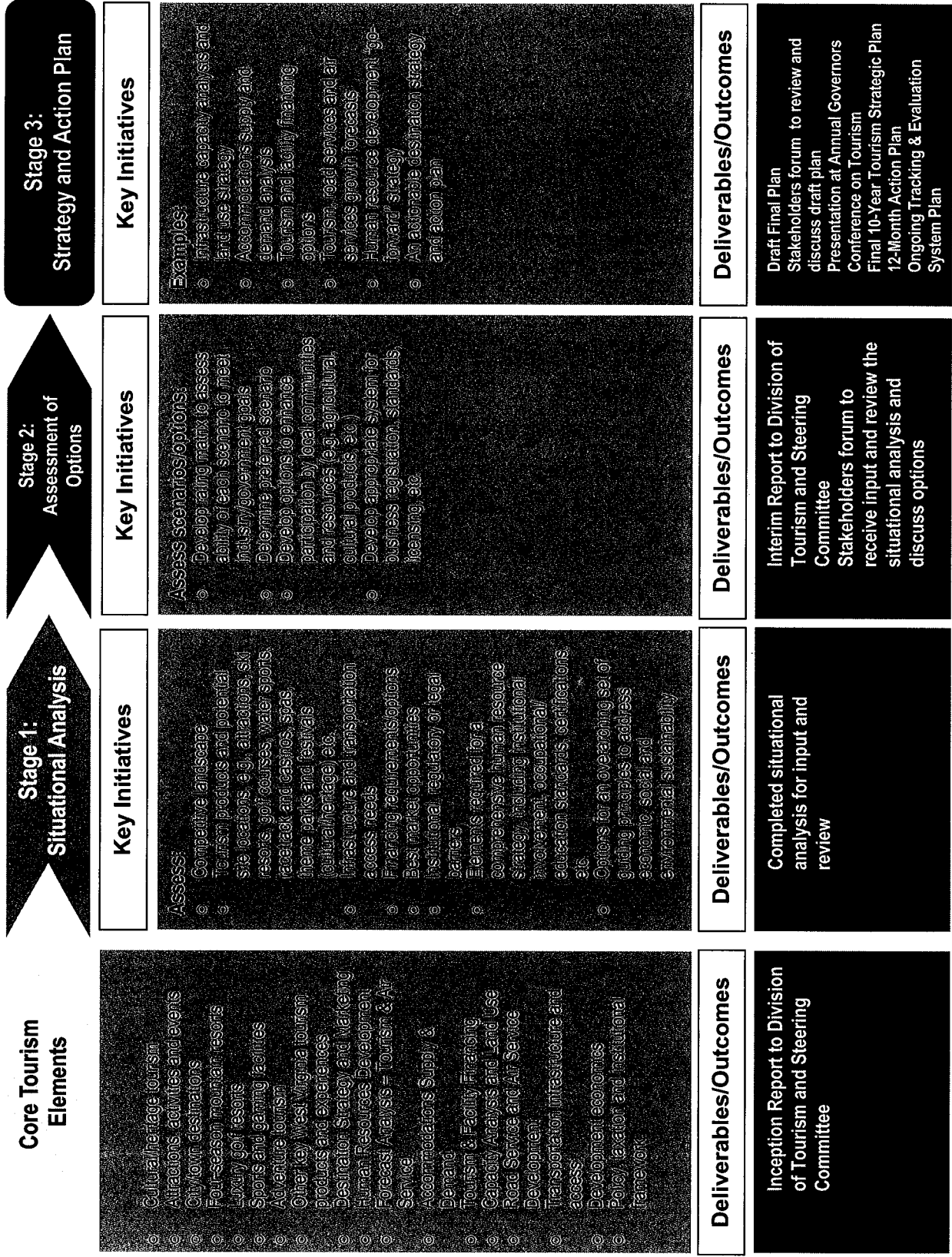
A tourism plan must have cohesion and integrity, and be as workable and effective in the regions as it is at major tourism sites and events. To ensure this, we intend to consult broadly with tourism and other industry sector stakeholders, including government officials, institutions, tourism providers, communities and individuals. These will include, but not be limited to:

- SCR31 Committee:
  - Members of the Legislature
  - Tourism Commission
  - West Virginia Hospitality & Travel Associations
  - Tourism Industry representatives
- Department of Commerce/Division of Tourism
- Other tourism associations, chambers of commerce, etc.
- Communities of interest: e.g., law enforcement, youth, communities, etc.
- Cultural and historic organizations
- Support industries to tourism
- Other industrial sectors
- Learning and training institutions

We believe this level of detailed analysis, and our three-phased approach will allow the InterVISTAS Project Management Group to work with the state of West Virginia to create a Strategic Tourism Plan that is demonstrably effective at every level, for the decade to come.



Figure 3-2: Work Plan Overview



## 3.2 Stage 1: Situational Analysis

The Strategic Tourism Plan begins with a detailed situational analysis of the current tourism environment. This analysis will allow us to develop a complete picture, and assess the current tourism product, infrastructure, enabling environment, traffic trends, capacity, and utilization of the West Virginia tourism product.

We will then measure this in relation to numerous key external factors – for example, tourism trends, source markets, growth, key market segments, traveler preferences, forecasts and competitor destinations. Through every step of the situational analysis, we will seek the input of individuals in both the private and public sectors, who have a stake in tourism development issues and opportunities.

The areas to be reviewed in the Situational Analysis will be determined in consultation with the West Virginia Division of Tourism, the Steering Committee and key stakeholders. In general terms, areas that will likely be addressed will be:

- **Review of the state of the tourism sector**, including its performance relative to main competing tourist destinations, relevant state and national policies, plans, strategies and regulations;
- **Audit of the tourism product on offer**, including market demand characteristics, and other factors such as the assessment of existing tourism products and experiences relative to existing laws and policies;
- **Identification of experiences, sites and attractions with potential to become new tourism products**;
- **Review of the impact of the current marketing strategy** and identification of potential new markets and market niches;
- **Assessment of and recommendations on the adequacy of tourism data** and related systems for measuring and monitoring the performance of the industry, and return-on-investment assessments for major state marketing and sales activities;
- **Analysis of the existing Institutional Framework for tourism policy-making**, planning and programs.

Having reviewed the requirements, and based on our experience in tourism market development, we have added forecasting tourism growth in West Virginia and surrounding states, transportation access strategies and development economics to the list of elements to be analyzed.

Team members will use a combination of tools to complete the analysis in each of these areas, including, but not limited to:

- Desk research, primary published research and new research
- Market analysis
- Site visits/field investigations
- Telephone interviews
- On-line research and scans
- Stakeholder interviews and focus groups
- Competitive analyses, including identification of best practices and case studies

- SWOTs
- Formal analysis and assessment of data and data sources

Once completed, we will use this detailed information compiled by team members to create a solid Situational Analysis “from the ground up”, giving us a three-dimensional and complete understanding of the current state of tourism in West Virginia.

### 3.2.1 Air Service Development

As part of this Strategic Plan, the project team will also assess West Virginia’s opportunity to further develop its air services and air tourism markets over the next ten years. The team at InterVISTAS have already begun to assess the nature and characteristics of air traveler service options and airline services in West Virginia, and have invested time in developing an initial air service picture for the state. As part of economic development and tourism projects throughout the U.S., Canada and overseas, InterVISTAS has assisted states and airport communities in protecting existing services, securing vital additions to existing air services, or developing entirely new air travel markets for these clients. InterVISTAS will develop a comprehensive air service development strategy for West Virginia within the strategic planning process. Currently, West Virginia has a total of 35 airports, of which eight of these have historically offered commercial air services. **Figure 3-3** illustrates the eight commercial airports within West Virginia, and the airlines serving those airports.

**Figure 3-3: Map of West Virginia's Airports**

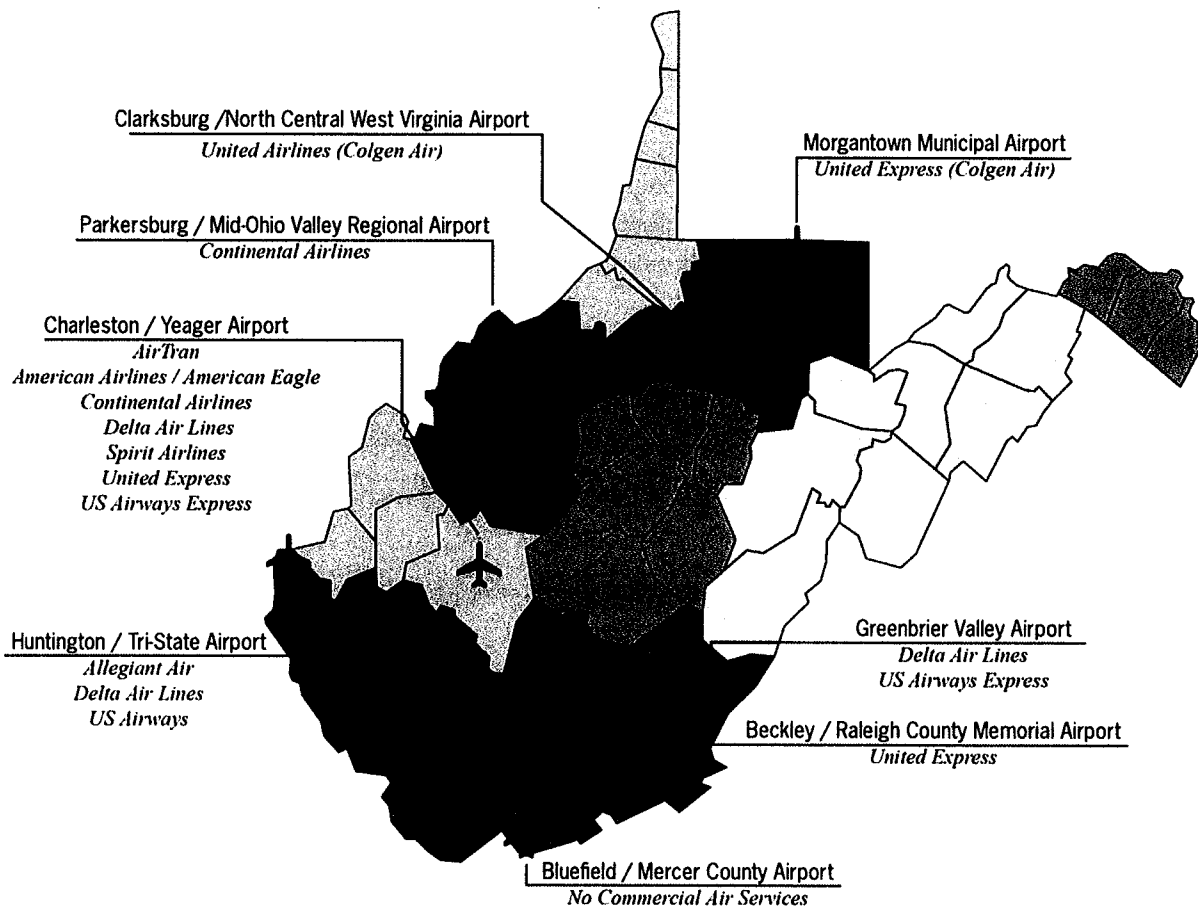


Figure 3-4 provides an overview of the initial air traffic analysis conducted by InterVISTAS, which reveals the current service coverage at these eight commercial airports. As seen below, Yeager Airport and HuntingtonTri-State Airport are the two largest airports, having handled over 510,000 and 220,000 annual passengers respectively in 2010.

**Figure 3-4: Summary of West Virginia's Current Commercial Air Services**

<b>Airport</b>	<b>Airlines Serving the Airport</b>	<b>Non-stop Markets Served</b>	<b>Annual Passengers, 2010*</b>	<b>Average Weekly Seat Capacity, 2010*</b>
<b>Charleston / Yeager Airport</b>	<ul style="list-style-type: none"> <li>▪ AirTran</li> <li>▪ American Airlines/ American Eagle</li> <li>▪ Continental Airlines</li> <li>▪ Delta Air Lines</li> <li>▪ Spirit Airlines</li> <li>▪ United Express</li> <li>▪ US Airways Express</li> </ul>	<ul style="list-style-type: none"> <li>▪ Orlando, FL</li> <li>▪ New York, NY</li> <li>▪ Chicago, IL</li> <li>▪ Houston, TX</li> <li>▪ Atlanta, GA</li> <li>▪ Detroit, MI</li> <li>▪ Fort Lauderdale, FL</li> <li>▪ Myrtle Beach, SC</li> <li>▪ Washington, DC</li> </ul>	518,970 passengers	15,020 seats
<b>Huntington / Tri-State Airport</b>	<ul style="list-style-type: none"> <li>▪ Allegiant Air</li> <li>▪ Delta Air Lines</li> <li>▪ US Airways</li> </ul>	<ul style="list-style-type: none"> <li>▪ Orlando, FL</li> <li>▪ Tampa Bay / St. Petersburg, FL</li> <li>▪ Ft. Lauderdale, FL</li> <li>▪ Myrtle Beach, SC</li> <li>▪ Cincinnati, OH</li> <li>▪ Charlotte, NC</li> </ul>	224,190 passengers	6,020 seats
<b>Parkersburg / Mid-Ohio Valley Regional Airport</b>	<ul style="list-style-type: none"> <li>▪ Continental Airlines</li> </ul>	<ul style="list-style-type: none"> <li>▪ Cleveland, OH</li> </ul>	9,720 passengers	790 seats
<b>Clarksburg / North Central West Virginia Airport</b>	<ul style="list-style-type: none"> <li>▪ United Express (Colgan Air)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Washington, DC</li> </ul>	17,980 passengers	1,270 seats

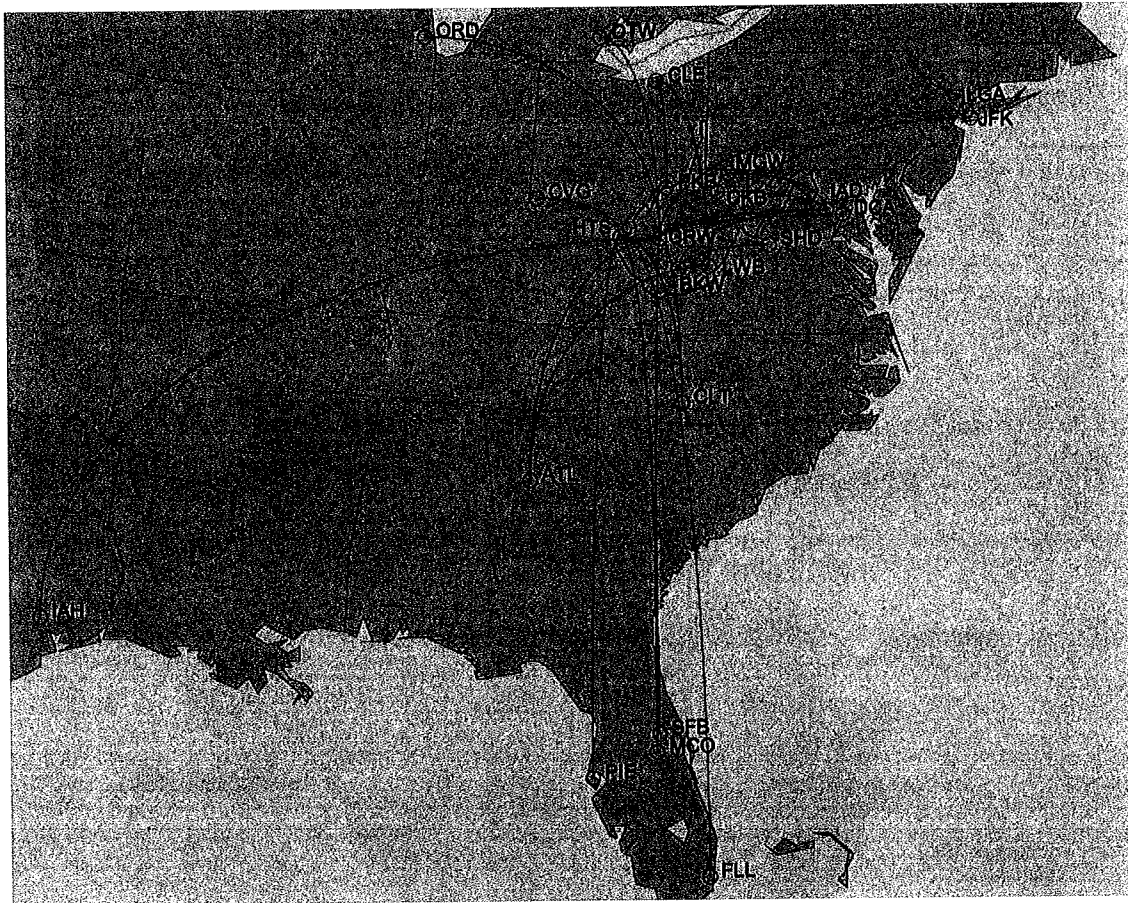
<b>Airport</b>	<b>Airlines Serving the Airport</b>	<b>Non-stop Markets Served</b>	<b>Annual Passengers, 2010*</b>	<b>Average Weekly Seat Capacity, 2010*</b>
<b>Morgantown Municipal Airport</b>	<ul style="list-style-type: none"> <li>▪ United Express (Colgan Air)</li> </ul>	<ul style="list-style-type: none"> <li>▪ Washington, DC</li> </ul>	33,230 passengers	1,650 seats
<b>Greenbrier Valley Airport</b>	<ul style="list-style-type: none"> <li>▪ Delta Air Lines</li> <li>▪ US Airways Express</li> </ul>	<ul style="list-style-type: none"> <li>▪ New York, NY</li> <li>▪ Atlanta, GA</li> <li>▪ Cleveland, OH</li> </ul>	20,360 passengers	970 seats
<b>Beckley / Raleigh County Memorial Airport</b>	<ul style="list-style-type: none"> <li>▪ United Express</li> </ul>	<ul style="list-style-type: none"> <li>▪ Washington, DC</li> </ul>	4,600 passengers	750 seats
<b>Bluefield / Mercer County Airport</b>	No Commercial Air Services Currently			

Sources: T-100 Market and Segment Database.

\*Annual passenger figures and average weekly seat capacity figures include both total inbound and outbound non-stop flights between November 2009 and October 2010.

**Figure 3-5** provides a geographic representation of the air markets served by each airport. Market catchment is part of an air service development strategy for specific airports in that market area. Further analysis and scenario development for air service will provide options for these eight commercial airports in attracting new travellers to the state from a variety of markets.

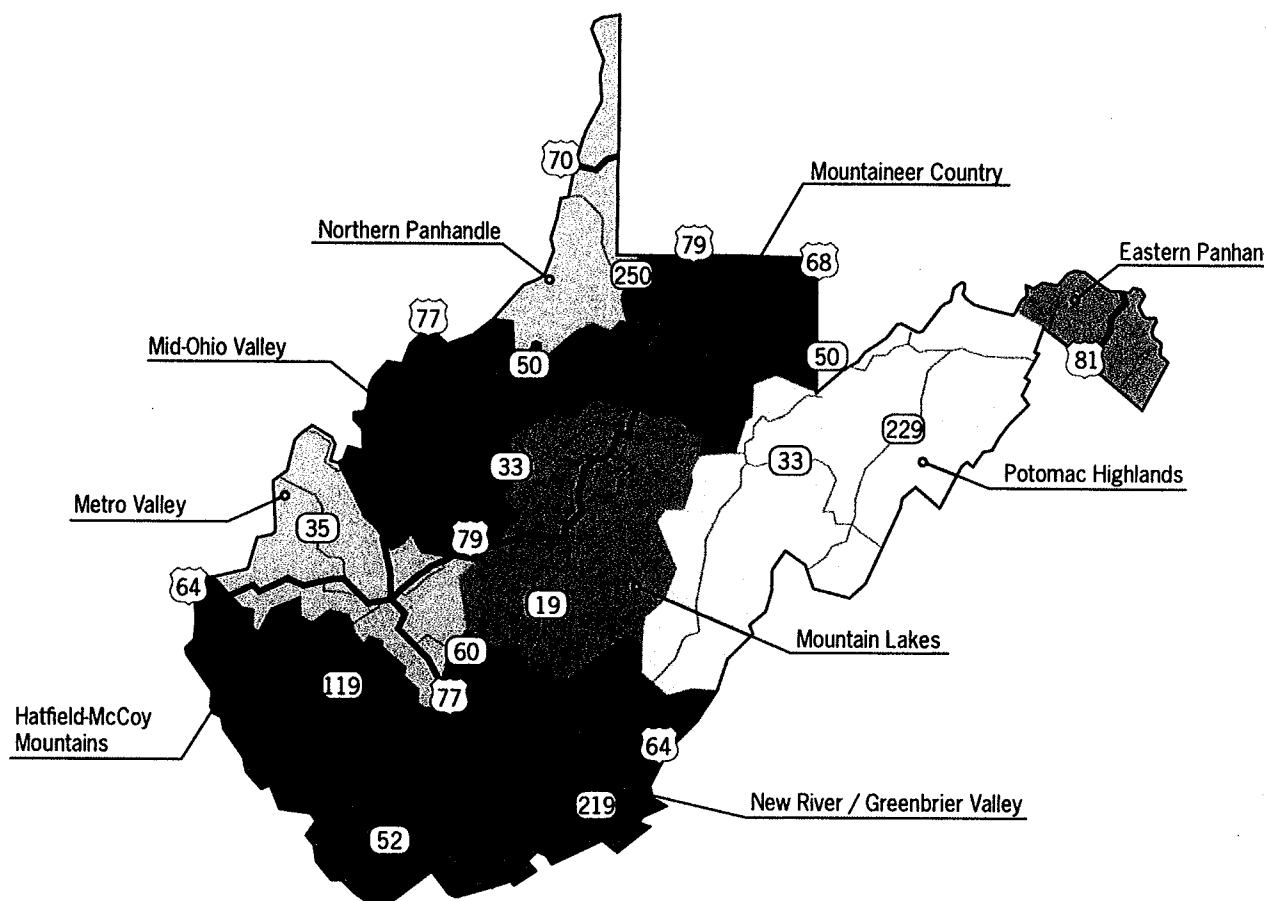
**Figure 3-5: Map of Non-Stop Air Markets Reached Via West Virginia's Commercial Airports**



### 3.2.2 Road Network Development

Due to the significance of the drive market to tourism activity, the study team will be assessing the level of accessibility for West Virginia's road networks beyond and within the state. The potential for road development and expansion will also be examined from both a business-case and policy framework. The project team is pleased to have Dr. Richard Mudge (Vice President with Delcan) conduct this assessment. **Figure 3-6** displays a map of West Virginia's current road network, which includes all major highways providing access to the state.

**Figure 3-6: Map of West Virginia's Current Major Road Network**



### 3.2.3 Capital Development

Jim Haguewood of ViTAL Economy (VE) is a renowned expert in capital funding and financing strategies, and will examine the issue of access to capital as part of the Tourism Strategic Plan for West Virginia. Again, to illustrate our approach in this module of the plan, VE developed an overview of capital development strategies.

Remote regional economies often are presumed to have limited financing resources based on historic patterns of decline in their performance. Although this perception persists, there is clear

evidence that many remote economies have access to more regional wealth resources than imagined.

VITAL Economy members are entrepreneurs who have experienced the highs and lows that accompany the process of accessing equity and debt financing to grow their firms. A number of its alliance members also have been involved in angel and venture capital networks. These experiences taught them that the long-term success of a firm was dependent on the availability and accessibility of specialty equity and debt finance sources that are appropriate to specific stages of development (i.e. start-up, emerging, growth or mature). This is also true for regional economies.

VE recognizes that each regional economy has unique capital requirements and assets. VE has created Regional Economy Capital Strategy services that first develop a financial services industry cluster composed of the region's private and public providers of capital resources. VE then works with cluster leaders to assess the regions in terms of:

- Levels of capital availability
- Areas of proven risk-analysis expertise
- Traditional and innovative lending resources
- Equity investor networks for each life-cycle stage of business development

Once an assessment is completed, cluster leaders work with VE to develop a Regional Economy Capital Strategy that identifies how regional resources will be better connected and accessed. The strategy also delineates the external capital resources needed to implement the regional Community Economic Development (CED) strategy.

VE has also developed an equity and debt finance life-cycle assessment process to determine a region's long-term capital requirements and gaps. This assessment and gap analysis ascertains the types of capital needed to fund public and private equity as well as debt financing for a region's CED strategy. This Life-Cycle Financing Service also provides valuable information that increases leadership's financial literacy and the likelihood that CED action plans will be financed.

### **3.2.4 Tourism Market Development**

As part of the Strategic Planning exercise, we will also produce a series of key tourism market analyses. As an example of this approach, Jacqueline Kuehnel (our team's Travel Trade and Tour Operator Specialist) has described our analytical process using the case of Canada, West Virginia's largest international market to date.

In 2009, 17.96 million Canadians crossed the border to the United States and despite a 5 percent drop from 2008, it remained the leader in international arrivals. Although this decline ended five consecutive years of 6 percent annual growth, Canada continued to account for over 33 percent of the total international arrivals into the U.S. Canada's 5 year consecutive record-setting numbers for tourism exports came to an end in 2009 but, despite a 13% decline, it held its place as the top international market, generating a \$10 billion trade surplus. U.S. travel and tourism exports account for nearly 38% of total U.S. services exports to Canada. Canada therefore remains the largest international market prospect for West Virginia, making a tourism analyses from Canada an intrinsic component of the economic development impact study.



The end-to-end analysis for a tourism market development plan would follow a four step process as outlined in **Figure 3-7**

**Figure 3-7 - Tourism Marketing Development Approach**



### **Market Research and Analysis**

Although West Virginia can be reached from across Canada by air using connectors via Atlanta (Delta), Philadelphia, Charlotte (US Airways), Newark (Continental), Chicago and Washington (United), the biggest geographical reach is from Ontario and Quebec (the two most populated Canadian provinces) from which land access is also possible. The research and analysis would therefore, focus on these provinces and would include:

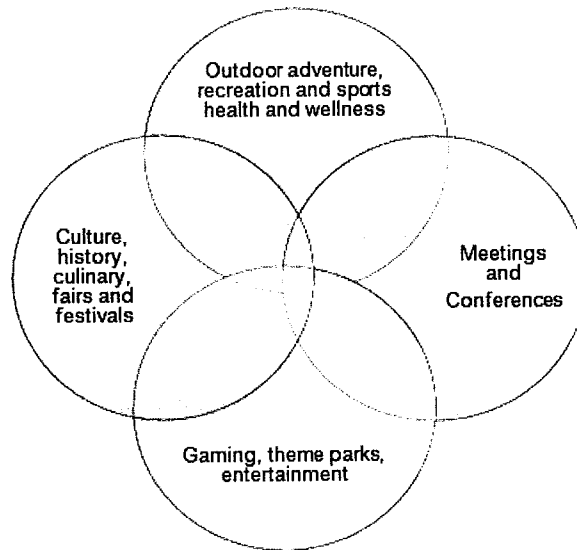
*Market size and projected trends*

*A competitive market scan*

*Demographics and preferences by West Virginia tourism product attribute clustering*

Current market size and projected trends for travel to the U.S. (air and land) would be done by province with a focus on Ontario and Quebec. Data for air routes would be sourced from the GDS (global distribution systems), bookings and cross border land data from Stats Canada, Outbound Canada from the Conference Board of Canada, Office of Travel and Tourism Industries (OTTI), the Canadian Automobile Association (CAA) and any other research the West Virginia Tourism Commission may provide from local sources.

A competitive market scan of how other U.S. states are currently marketing and promoting their tourism product in Canada would be conducted with data collected via desktop internet research of their advertising and promotions. In addition, the team would conduct interviews with Canadian destination representatives or public relations companies currently retained for areas such as Texas; Massachusetts; Las Vegas, Nevada; Myrtle Beach, South Carolina; Arizona; Colorado; New Hampshire, and others.

**Figure 3-8: Broad Clusters of West Virginia's tourism products**

### **Stakeholder Interviews**

Partnership development in the Canadian market will be an integral part of a tourism development strategy. The stakeholder interviews are intended to gauge the interest for the development of additional air routes from Canada, establish tour operators' and retail agencies interest in packaging and promoting niche and specialty products and explore the meetings, incentive and conference market. The stakeholders would include a wide range of transportation providers (air and land), retail travel agencies, tour operators, meeting planners and associations. Below is an example of the type of organizations that would be targeted for interviews.

#### ***Transportation and Tour operators***

Stakeholders would include airlines such as Air Canada, Porter and Westjet; motor coach tour companies such as Tauck World Discovery, Cosmos, Trafalgar, Insight and Comfort tours; U.S. based incoming tour operators with access to hotel inventory in West Virginia that are able to package with scheduled air; soft adventure companies such as Gap and Intrepid; niche tour operators for golf, motorcycle clubs, outdoor adventures such as water rafting, rock climbing, mountain biking, snowmobiling, etc.

#### ***Travel Retail Agencies***

CAA has over 135 travel agency locations across Canada and provides support to the self-drive market; independent retailers that service the various demographic profiles; online travel merchants such as expedia.ca that offer dynamic packaging of air and hotels.

#### ***Meeting Planners***

Interviews with specialized Canadian agencies such as Carlson Marketing will help to establish potential business development opportunities as well as provide intelligence on competing destinations. These specific interviews will aid in formulating recommendations for West Virginia's enhancement of services, development of infrastructure, and development of meeting and conference products.

**Associations**

Interviews with Canadian trade associations will provide valuable sector specific insights and industry contacts. Stakeholders to be considered are Canadian chapters of Discover America, Meeting Planners International, the Society of Incentive Travel Executives, Ontario and Motor Coach Association, Association of Corporate Travel Agencies, and other activity-based associations such as golf, alpine, motorcycle, hunting and fishing, etc.

A stakeholder questionnaire would be developed in conjunction with the West Virginia Division of Tourism and Steering Committee, and interviews would be conducted over a period of two weeks in person, via phone and email.

**Strategic Analysis**

A SWOT analysis methodology would then be used to consolidate the market research of this study with existing aggregated data from the West Virginia Tourism Commission (and other sources) and the key outcomes from the stakeholder interviews. The purpose of the SWOT is to link the current West Virginia tourism product offering (internal) with the Canadian demand side's requirements and expectations (external). A gap analysis will provide the foundation for recommendations on a growth strategy centered on Canadian market penetration and development (current markets) and tourism product and service diversification and development (future markets).

**Recommendations and Action Development Plan**

The recommendations and action development plan will identify the key strategic issues and challenges in marketing West Virginia as a tourism destination in Canada. Some recommendations may include:

- How to leverage current Canadian drive-through traffic to stop and stay in West Virginia
- Tourism product development to capitalize on the vast natural beauty, culture, history, and culinary attributes. This may include suggestions on infrastructure development initiatives, tourism capacity building, community development, and private and public sector investment
- Possible branding of West Virginia in Canada
- Packaging of West Virginia tourism products with air or land transport for both the individual and group traveler
- Target-market tourism by activity such as ecotourism, golf, adventure, gaming etc
- Use of a Canadian representative to develop integrated trade and consumer marketing plans on behalf of West Virginia and specific to each Canadian province
- Development of targets to measure performance in the short, mid and long-term based on the current tourism product infrastructure and offering, and on development initiatives to enhance traffic to the area in the future

### 3.3 Stage 2: Identify and Assess Options

This stage of the work will present options (i.e., scenarios) for tourism development, based on the Situational Analysis findings.

To accomplish this, we will first identify the broad range of options for tourism development. Then, in collaboration with all key stakeholders, we will select those that offer the greatest potential for West Virginia, based on diversification, demonstrable economic, cultural and social benefits, and sustainability over the long term.

Our work will include:

- (i) **Evaluation of the carrying capacity** and assessment of the infrastructure needs at selected existing and potential sites;
- (ii) **Exploration of options for enhancing participation by local communities and small businesses** as a means of strengthening economic linkages;<sup>1</sup> and
- (iii) **Developing a prioritized list of tourism opportunities**, within a larger context of the competitive environment, market trends, and other related factors

There is no cookie-cutter solution in tourism. Each scenario will have both strengths and weaknesses. In order to rank the various options against risks/opportunities, we will create a detailed matrix that would compare the risks/rewards of each scenario. Based on the input and evaluation of the Division of Tourism, the Steering Committee and other key stakeholders, we would determine which scenario (or mix of scenarios) is the most closely aligned with West Virginia's objectives, and offers the greatest opportunity and least risk.

In keeping with our project methodology and work plan, team members will formulate detailed input into the scenarios to ensure that each has sufficient depth and information for sound decision-making.

The steps we propose are described below.

#### 3.3.1 Steps to identify and assess options and risks

##### 1. Develop scenarios/options

- Present and agree on scenarios with West Virginia
  - Identify potential sites for development
  - Identify tourism products and potential site locations, e.g., attractions, eco-tourism, cultural/heritage tourism, etc.
  - Identify infrastructure and transportation access needs
  - Identify financing requirements and options
  - Identify best market opportunities
  - Identify institutional, regulatory or legal barriers
  - Identify the elements required for a comprehensive human resource strategy, including institutional involvement, occupational/education standards, certifications, etc.
  - Assess the carrying capacity for each potential location

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<sup>1</sup>One such option may be the provision of various incentives to encourage greater participation by local businesses and communities. An assessment of the efficacy of providing such incentives would, therefore, form part of the analysis.

## 2. Assess scenarios/options

- Develop a rating matrix to assess ability of each scenario to meet tourism industry/government goals
- Determine the preferred scenario
- Develop options for enhancing participation by, and benefits to, local communities and resources (e.g., agricultural, cultural products, etc.)
- Develop an appropriate system for business registration, standards, licensing, etc.
- Develop an Interim Report
- Deliver Tourism Forum with all stakeholders to present and fine-tune the situational analysis and to review the emerging scenarios

## 3.4 Stage 3: Tourism Strategic Plan Development

The third stage is the culmination of all the work done in the previous two stages. A strategic plan and marketing action plan will be created, inclusive of risk management measures. Based on the findings in Stages 1 and 2 and the outcome of a second stakeholders' forum, we will know what the State's aspirations are, and what its ten year vision for tourism is. We will know how to best incorporate tourism into West Virginia's cultural and social fabric, in a way that is responsible, respectful and beneficial. We will know West Virginia's strengths as a tourism destination, and how to develop and enhance its products. And, we will know how to market, to whom, and identify the most effective strategies.

To address this, the Project Management Team will create a four-part Action and Implementation Plan.

### 3.4.1 Tourism Strategic Plan Overview

The following describes the tourism strategic plan components which are illustrated graphically in **Figure 3-9**.

#### **Enabling environment**

This section of the Strategic Plan will identify the key measures to be taken by the public and private sectors to enable tourism industry development. These include:

- Legislative Framework; including policy, regulations, liability protection, etc.
- Investment and Access to Funding Plan
- Land Use and Capacity recommendations
- Mechanisms for public/private cooperation
- Economic and Tourism Forecasts
- Improved information and data collections systems
- Linkages to other sectors that support tourism and/or enhance the tourism product
- Linkages to "communities of interest", e.g., law enforcement, public awareness, quality of life for residents, etc.
- Proactive and effective overarching destination strategy

## **Tourism Products**

Based on the analyses of markets, opportunities, infrastructure, carrying-capacity, etc. of Stage 2 options, this section will provide a detailed map of the tourism products and product mix identified or to be developed. These may include, but not be limited to the list provided in the RFP, and may be grouped by type of experience, target audiences, price points, etc.

We have identified the National Scouts Reserve and other assets such as the winter alpine resorts and luxury golf resorts (such as the Greenbrier) as key tourism products that have the potential to reach across North America and the world to attract new tourists to West Virginia. Further research, analysis and consultation will likely reveal other “marquee tourism” sites across the state.

## **Support**

This section will identify the elements required to support all aspects of tourism development, and may include, but not be limited to the following:

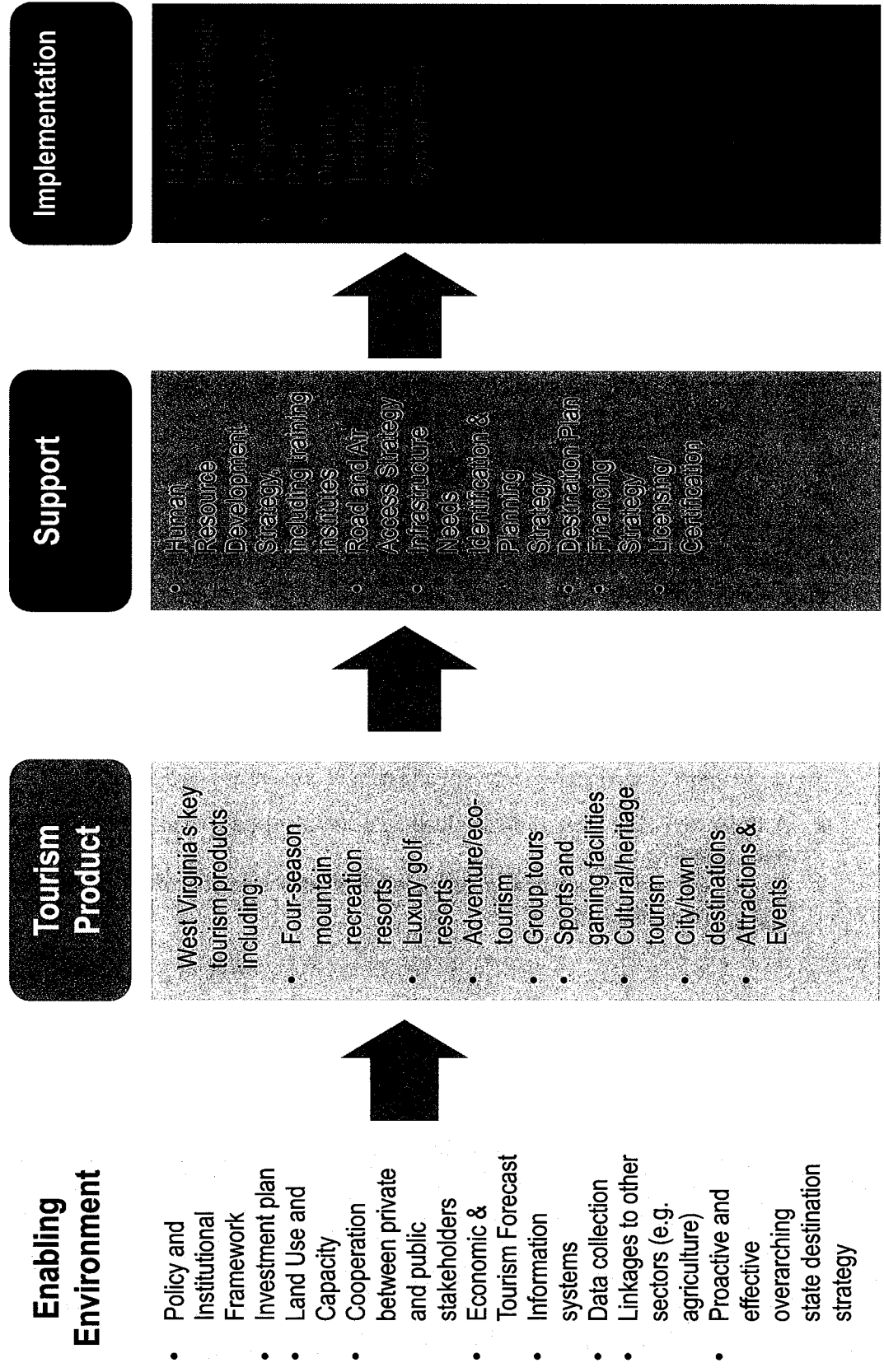
- Human Resource Development Strategy
- Transportation Access Strategy
- Infrastructure Needs Identification & Planning Strategy
- Destination Marketing Plan
- Financing Strategy
- Environmental/Sustainable Tourism Strategy

## **Implementation**

The final element of the Strategic Plan will be an implementation plan that provides a clear road map for the ten years of the Plan, and will enable the state to track, refine and update the plan to ensure it is continuously relevant and current. This also includes:

- A 12-Month Action Plan summary document, including steps to be taken and key responsibilities
- An ongoing tracking and evaluation system plan of all elements of the strategy to revise and adjust as required

Figure 3-9: Strategic Plan Overview



## 4. Project Deliverables and Timeline

### 4.1 Deliverables

The following are deliverables that InterVISTAS envisions for this project.

1. **A series of sub-reports by subject matter:** Each sub-report developed for the draft strategic plan represents a summary analysis of required services to support tourism growth and development in West Virginia. The following are examples of (but not limited to) the subject matter to be produced: Air Service Access Opportunities, Road Network Assessment, Capital Funding Opportunities and Tourism Development Strategies.
2. **SWOT Analysis and Development of State Scenarios:** In Stage 2 of the project, a Strength, Weaknesses, Opportunities and Threats Analysis will be completed to identify and prioritize scenarios and options by subject matter. An evaluation of these scenarios follows this analysis, identifying the relationship between each tourism development component and assessing the preferred scenario. The culmination of Stage 2 would be the preferred and recommended scenario for the draft strategic plan.
3. **Ten Year Tourism Strategic Plan:** The strategic plan envisioned for West Virginia will be a document with strong stakeholder buy-in and support, and implementable initiatives to help maximize tourism opportunities for West Virginia. The consultations held with stakeholders will be essential in developing effective components to the Strategic Plan.
4. **12-Month Action Plan:** An action plan will be crafted to ensure the implementation of the key tourism and economic development initiatives identified in the overall strategic plan.

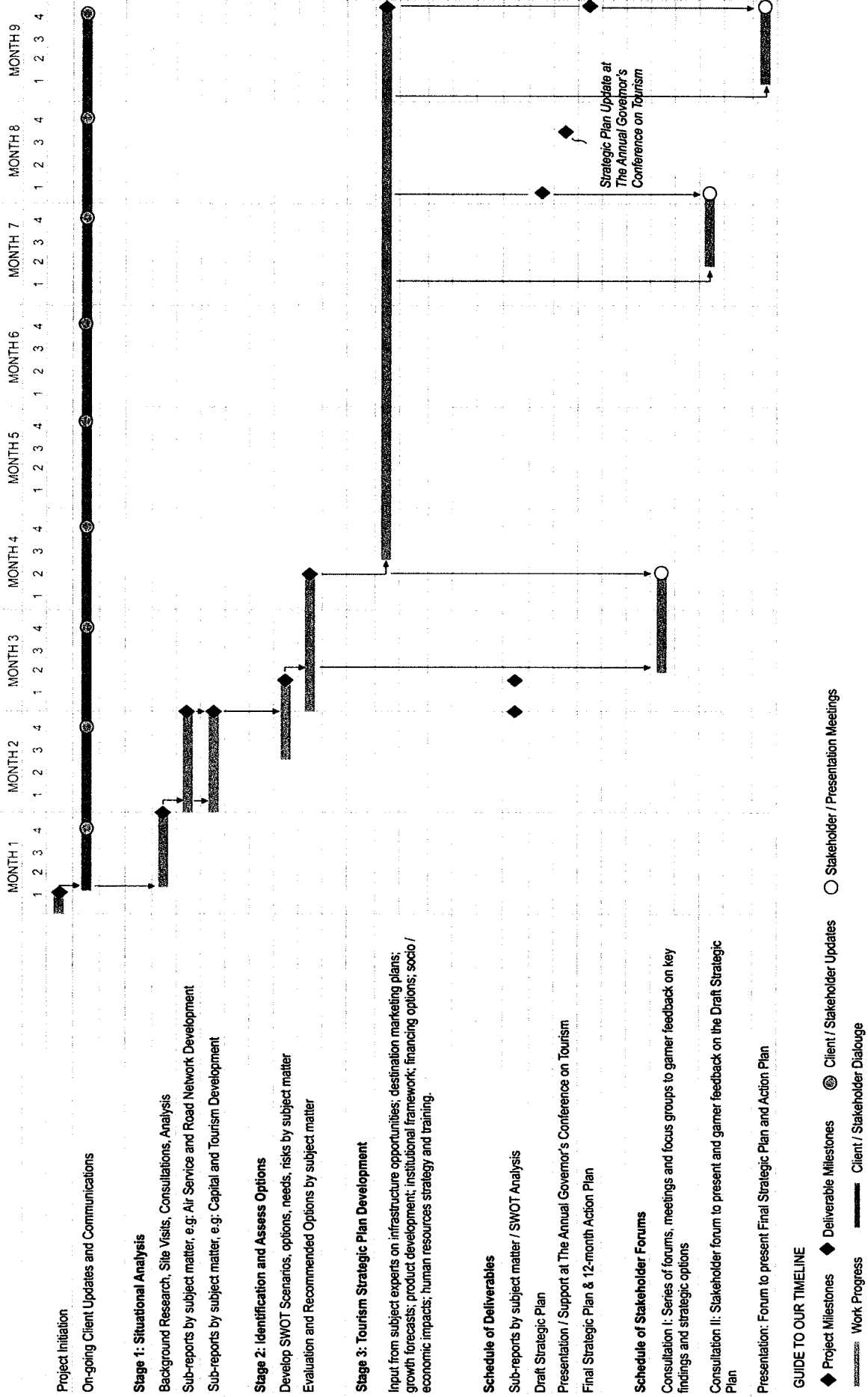
### 4.2 Project Timeline

Figure 4-1 displays the proposed project timeline and deliverables in a Gantt chart.

InterVISTAS is dedicated to ensuring the highest quality work, performed in the most efficient manner, to the satisfaction of its clients. InterVISTAS has weekly internal planning meetings to ensure the schedule developed is strictly adhered to. An ongoing project update has been scheduled at the end of each month to ensure the Division of Tourism and/or the Steering Committee that project tasks are proceeding as planned within each of the stages proposed. InterVISTAS believes in the importance of communication, and as this project requires input from a variety of stakeholders, open communication will be established for client and stakeholder involvement throughout the entire project.



**Figure 4-1: Project Timeline**



## 5. Oral Presentation

Representatives of InterVISTAS and its partners would be pleased to give an oral summary presentation of the bid in person upon request by the Division of Tourism and the Steering Committee.

## 6. Contact

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## **Appendix A: Curriculum Vitae for Members of the Consulting Team**

## Paul Clark

Vice President, Destinations and Customer Experience  
InterVISTAS Consulting Inc.

Mr. Clark has more than 20 years management experience in the tourism and transportation industries, specializing in strategic planning and market development. He has developed business solutions for national and regional tourism agencies, resort and city destination marketing organizations, tour operators and airport management groups. He has worked in tourism and travel projects in the Dominican Republic, Saint Martin, the Canary Islands, Australia, New Zealand, Chile, Canada, the United States, India and China. He recently returned to InterVISTAS from Tourism British Columbia where he was on an executive secondment developing international tourism strategies for the host destinations of the 2010 Vancouver Olympics.

Mr. Clark was appointed as a national industry representative to the Canadian Tourism Commission's Research Committee, and provides input on various national and international marketing research programs conducted by the CTC. In addition to his market development work, he has designed and moderated more than 50 resident and visitor focus groups throughout Canada on a variety of travel-related and event-related topics. Prior to consulting, Mr. Clark held senior posts in market research with Tourism Whistler and the Vancouver Airport Authority, and in marketing and sales with Forbes Travel International. Mr. Clark holds a BSc degree from the University of Glasgow in Scotland and a Masters degree from Simon Fraser University in British Columbia, Canada.

### PROJECT AND WORK EXPERIENCE

- **Directed international tourism development programs** for Tourism British Columbia in the lead-up to and during the 2010 Vancouver Olympic Games
- Designed and developed **Tourism Vancouver's 2008-2015 Strategic Plan**
- Designed and developed **Tourism Richmond's 2007-2012 Strategic Plan**
- Designed and directed an **outbound traveller opportunity assessment** for Armstrong Hospitality Group in **India**
- Designed and directed an **outbound traveller opportunity assessment** for Armstrong Hospitality Group in **China**
- Directed an opportunity analysis and developed recommendations on **Mexico's outbound leisure travel market**, specifically to Alberta, Canada
- Designed and moderated a series of **focus groups** with travel agents, tour operators and residents on airport preferences and key factors influencing vacation choices in the Caribbean, Florida and Europe
- Directed a **cruise terminal review process for the Port of Vancouver**, which involved stakeholder workshop moderation and interviews with key cruise industry partners
- Directed tourism research component and was contributing author on **Puerto Rico's Tourism & Transportation Strategic Plan**

- Designed and moderated a series of **on-board focus groups** with residents and tourists on the travel/service experience provided by the British Columbia ferry system
- Directed **leisure and business travel research** component and was contributing author on the Churchill (Canada) Convention & Visitors Centre re-development study
- Designed and moderated a series of **in-terminal focus groups** with Canadian, European and Asian nationals on the customer service experience provided by Vancouver International Airport Authority
- Created a five-year **marketing plan for Ski Banff/Lake Louise/Sunshine**, the joint-venture resort destination marketing and tour wholesaler group owned by the mountain recreation resorts of Lake Louise, Sunshine Village and Mount Norquay in Banff, Canada. Also conducted a strategic assessment of the 2000 Marketing Plan for Ski Banff/Lake Louise/Sunshine
- As Director of **Market Research for Tourism Whistler**, created and developed numerous programs examining national & international leisure and business travel markets, convention markets, accommodations occupancy & room rate assessments, festival & events markets, and golf markets
- Project Director/Senior Consultant in **air passenger research** (tourists and residents) and customer satisfaction research for Vancouver International Airport, Canada, Edmonton International Airport, Canada, Kamloops Airport, Canada, Fort St. John Airport, Canada, Las Americas & Gregorio Luperon International Airports, Dominican Republic, Wellington International Airport, New Zealand, Arturo Merino Benitez International Airport, Chile, Greater Moncton Airport, Canada
- Project Director of **tourism/airport retail studies** for Vancouver International Airport, Canada (ongoing), Wellington International Airport, New Zealand, Princess Juliana International Airport, St. Maarten, Las Americas & Gregorio Luperon International Airports, Dominican Republic, Arturo Merino Benitez International Airport, Chile, Winnipeg International Airport, Canada

## EDUCATION

- Master of Arts, Geography (Specialization – Travel and Tourism Research), Simon Fraser University, Canada - 1992
- Foundation Program in Tourism Management, Simon Fraser University, Canada - 1990
- Bachelor of Science (Honours), Geography (Specialization – Travel and Tourism Research), University of Glasgow, Scotland – 1987

## Steve Martin

Senior Vice President, Economics and Strategic Services  
InterVISTAS Consulting Inc.

Steve directly manages InterVISTAS' Development Economics and Environment groups. He provides management oversight of regulatory impact assessments, economic impact studies, forecasting, development economics projects, and environmental services. He was the Principal Investigator of a project for the Transportation Research Board (TRB) of the National Academies relating to passenger air service development at smaller communities. oui

Prior to joining InterVISTAS, Steve served as Assistant Director for Aviation Issues at the U.S. Government Accountability Office (GAO), where he worked for over 20 years, managing a diverse and large staff in both headquarters and regional offices. His reports contributed to the public debate on a wide range of aviation policy matters, including the viability of service to small communities, liberalizing air service across the North Atlantic, the effects of airline bankruptcies, and airport security. Building on that experience and GAO's reputation for accuracy, integrity, and reliability, Steve oversees the practice's quality assurance functions.

### Representative Experience

- **Deputy Practice Manager**
  - Steve provides management oversight of projects and resources within the firm's Economics and Strategic Services practice, including regulatory reviews, economic impact assessments, forecasts of passenger and cargo activity at airports, consumer research, tourism development, and business strategy services. He directly oversaw InterVISTAS' work on regional economic impact models and industry "cluster studies" of transportation and energy for clients in Illinois. He leads the firm's business development efforts with the World Bank, Inter-American Development Bank, and the U.S. Trade and Development Agency (USTDA).
  - He manages the firm's economic impact analyses for various airport clients. These projects estimate the effect that airports' operations (including expansions) produce on regional economies in terms of employment, earnings, and taxes. They include the economic contribution that business and leisure passengers make to an area's economy.
- **ViTAL Economy (2007-present)**
  - Steve is InterVISTAS' member of the ViTAL Economy alliance, which works to enhance economic development in rural economies. InterVISTAS developed an economic model that projects the economic impact of development strategies in those areas. The model uses county-level data from the U.S. Bureau of Economic Analysis to estimate changes in employment, earnings, GDP, and output of various economic development scenarios or strategies. It thus allows regional decision makers to identify and develop quantifiable strategies to foster economic growth. Steve has managed the completion of multiple "cluster studies" that identified specific business

- opportunities in transportation (e.g., rail car cleaning) and alternative fuels (e.g., landfill gas).
- **Alexander County (IL) Intermodal Terminal (2008-2009)**
    - Steve directed InterVISTAS' efforts to examine the economic feasibility of a new port on the Ohio or Mississippi rivers that could support the movement of agricultural and/or bulk commodities in international and domestic commerce. The report examined the key factors underlying potential demand for a new inland waterway terminal in Southern Illinois. The report identified and examined the competitive alternatives that shippers in the area might use (i.e., other nearby port facilities that are already in operation). The project included an analysis of the potential port's Strengths, Weaknesses, Opportunities, and Threats against other ports or terminals in the area, along with a discussion of the structure of small inland waterway port authorities.
  - **Transportation Research Board, (2007-present)**
    - Steve was Principal Investigator of a project for the Transportation Research Board (TRB) of the National Academies relating to passenger air service development at smaller communities. This Guidebook discusses all aspects of air service development techniques and provides a single source that small communities can use as a reference point. The Guidebook is based on both primary and secondary research, featuring surveys and in-depth case studies of 41 small community airports in the continental United States.
  - **Transportation Issues, U.S. Government Accountability Office (GAO)**
    - Steve spent the bulk of his professional career at the GAO. In his last 10 years there, he worked on issues concerning multiple transportation issues, mostly involving aviation. He led GAO's evaluation of issues relating to the financial and competitive health of the U.S. commercial airline industry. These included questions of the effects of airline bankruptcy, potential benefits of liberalizing trans-Atlantic aviation agreements, aviation taxes and fees, reservation systems, various mergers and alliances, and efforts to provide or enhance service to small communities through both the Essential Air Service and Small Community Air Service Development programs. His aviation background includes evaluations of noise mitigation programs and aviation security. He contributed to reports on freight bottlenecks and Amtrak's operations on the Northeast Corridor.
    - As part of this work, Steve prepared and delivered testimony, written reports, and briefings to Members of Congress, committee staff, and Members of Congress' personal staffs. He is intimately familiar with government auditing standards. He maintains regular contacts with staff of the committees in the House and Senate with responsibility for transportation and security matters, including appropriations.
  - **Other**
    - Steve's 30 years of Washington, DC experience provides clients with the benefits of relationships built with major relevant trade associations, including ATA, NBAA, AAAE, ACI-NA, IATA, RAA, and others, as well as the transportation attachés at the major international embassies.



- He has facilitated meetings and workshops with Canadian and U.S. federal aviation officials. He has extensive public speaking experience, having participated in multiple professional conferences and workshops (AAAE, ACI-NA, TRF, and others) and having chaired panels at Transportation Research Board's annual conference. He has often been cited in both the trade and popular press on matters concerning commercial aviation.

**Professional Credentials**

- Master of Arts, Public Policy, Duke University
- Bachelor of Arts (Honors), Political Science, Miami University (Ohio)
- Additional graduate-level coursework, Public Finance and Econometrics, George Washington University (no degree)

**Memberships/Special Qualifications/Publications:**

- Transportation Research Board, Aviation Economics and Forecasting Committee member
- Board of Directors, International Aviation Club of Washington
- Board of Directors, Greater Washington Aviation Open
- AAAE Airline Economics and Air Service Committee
- AAAE Environmental Affairs Committee

## Paul Ouimet

Executive Vice President  
InterVISTAS Consulting Inc.

As one of the founding partners at InterVISTAS, Paul Ouimet has played a major role in developing the firm's strategic planning practice in the transportation and tourism sectors.

Paul Ouimet has worked with many clients to develop strategic plans, including: numerous airports across Canada; Gateway Councils; Honeywell; BC Ferries; and the BC film industry. He has worked closely with the Greater Vancouver Gateway Council (former Chair of that Council's Vision Task Force as well as another Task Force on Tax-Exempt Bond Financing) and other Gateway Councils in Southern Ontario, Halifax, New Brunswick which he helped establish. He has extensive knowledge of transportation policy issues in all modes of transport.

Specifically in tourism, he has prepared strategic plans for several tourism authorities as well as major hotel properties. In 2002, he prepared a comprehensive Tourism & Transportation Strategic Plan for Puerto Rico which was officially adopted by the Governor. Other strategic plans have been developed for: Caribe Hilton Hotel in Puerto Rico; Starwood Properties Our Lucaya Resort in the Bahamas; and the Puerto Rico Hotel & Tourism Association. He has also led several organization and governance reviews. He monitors global tourism developments and issues.

He has gained an international reputation for facilitating strategic planning processes and leading stakeholder consultations. He facilitates board and management retreats for numerous clients on a regular basis. He has also conducted several public and private consultation sessions as a key deliverable under various projects. In 2007, he worked with the Vancouver, North Fraser and Fraser Port Authorities to develop a business case to merge their organizations.

Prior to joining InterVISTAS, Mr. Ouimet was Vice President of the Western Transportation Advisory Council, a highly respected national organization of Canadian business, government and labour leaders. He has extensive knowledge of transportation policy issues in Canada and abroad and has worked on policy initiatives in all modes of transportation. He has worked with Transport Canada and several provincial governments to develop new transport policy statements.

He has also held management positions with the Edmonton Chamber of Commerce and Edmonton Economic Development Authority. He has taught transportation policy at the University of British Columbia.

Paul Ouimet serves on the board of the Canadian Transportation Research Forum and previously served on the Greater Vancouver Transportation Authority (TransLink) Public Advisory Committee. He has worked closely with the Greater Vancouver Gateway Council and was the Chair of the Council's Vision Task Force as well as another Task Force on Tax-Exempt Bond Financing.

## Select Project Experience

### Strategic Planning

- Completed strategic plan assignments for several airports including Vancouver, Halifax, Winnipeg, Regina, Victoria, Comox, Quebec City, Saskatoon, Cranbrook, Gander, Hamilton and Edmonton

- Organized and facilitated strategic planning sessions with several organizations including: Greater Toronto Airport Authority; Halifax Port Authority; Halifax Smart Port Leadership Council; Honeywell Corporation; Puerto Rico Hotel and Tourism Association; Puerto Rico Convention Bureau; and Winnipeg Chamber of Commerce
- Retained by the Puerto Rico Tourism Company to complete a comprehensive strategic plan to develop Puerto Rico's tourism and transportation industries (plan officially adopted by Governor in 2002) and updated plan in 2009
- Led project for the Vancouver, Fraser Port and North Fraser Port Authorities to consider an integrated authority structure and develop the business case
- Retained by the Government of British Columbia to consider options to establish a new Gateway Development Corporation
- Developed start-up plans and strategic plans for the Halifax, Southern Ontario, New Brunswick Gateway Councils and Port Alberta
- Prepared a strategic plan for Starwood Properties Our Lucaya Resort in Freeport, Bahamas
- Completed strategic plan for BC Ferries following announcement of major reorganization in 2003
- Worked with Hilton International to develop strategic plan for Caribe Hilton
- Retained by Canadian Film and Television Producers Association and BC Film Industry to organize a Film Forum and prepare a strategic plan to expand film industry
- Completed comprehensive organizational reviews of Puerto Rico Tourism Company and Bermuda Department of Tourism
- Retained by several groups including Port of Prince Rupert to develop a Northwest Corridor Transportation Strategic Plan
- Prepared Air Transportation Development Strategy for the Alberta Economic Development Authority

### **Transportation Policy**

- Retained by the British Columbia Ministry of Transportation & Highways to work with industry leaders to develop an Integrated Transportation and Border Management Action Plan
- Organized Open Skies Forum for the Canadian Airports Council in 2005
- Retained by the Hon. Tony Valeri, Minister of Transportation, to prepare A New Vision for Transport Canada; policy paper was submitted to Federal Cabinet in December, 2003
- Organized International Air Policy Forum for the Canadian Airports Council
- Served on 'Delta Team', made up of executives from ports, railways, trucking companies and shippers, to discuss possible changes to Canada Transportation Act and provide input to CTA Review Commission
- Organized national workshops for Federal Deputy Minister of Transport to discuss and make recommendations on key issues in the marine industry
- Retained by Transport Canada to organize Port State Control meeting which was attended by 60 Transport Ministers from around the world
- Organized and chaired Program Committee for 1997 APEC Transport Ministers Meeting
- Served as a Member of the Transportation and Tourism Group for the Hon. Michael Wilson's Prosperity Initiative
- Worked at WESTAC, as Vice President - authored numerous publications on trade and transportation policy issues and developments, in all modes of transport

**Economic Development and Marketing**

- Retained by CN Rail to select a rail passenger tour operator on BC Rail line in 2004
- Manage comprehensive Air Access Program for the Puerto Rico Tourism Company and Air Cargo Program for the Puerto Rico Ports Authority
- Worked as Manager, Transportation Development, for the Edmonton Economic Development Authority; responsible for marketing programs for air, rail and truck modes of transport
- Worked as Manager, Development Department, Edmonton Chamber of Commerce, and was responsible for transportation committee and numerous initiatives

**Gateway Councils**

- Worked extensively with the Greater Vancouver Gateway Council on various initiatives, including:
  - Chaired committee on Gateway Vision and was lead author for strategic plan
  - Chaired committee which considered Tax-Exempt Bond Financing options for Canada
  - Represented the Gateway Council on the GVTA Public Advisory Committee
  - Facilitated various retreats for the Council
- Retained by Halifax International Airport Authority, Halifax Port Authority, Greater Halifax Partnership, and Nova Scotia Business Inc. to establish a Halifax Gateway Council
- Developed a strategic plan for the Halifax Gateway Council
- Worked with Greater Toronto Airports Authority, Toronto Port Authority, Hamilton International Airport Authority, Hamilton Port Authority and Hamilton Chamber of Commerce to establish the Southern Ontario Gateway Council
- Developed a strategic plan for the Southern Ontario Gateway Council
- Worked with the Saint John Port and Airport Authorities, Moncton Airport, Irving Oil Canpotex to establish a Southern New Brunswick Gateway Council
- Worked with Edmonton Airports, Edmonton Chamber of Commerce, Edmonton Economic Development Authority and City of Edmonton to develop start-up plan for Port Alberta
- Retained by Infrastructure Canada to prepare a paper on Gateways in Canada for the Cities Secretariat

**Education**

- Masters of Business Administration, University of British Columbia
- Bachelors of Commerce in Economics and Marketing, University of Alberta

**Professional associations**

- Board Member of the Canadian Transportation Research Forum
- Past Board Member:
  - British Columbia Aviation Council
  - Greater Vancouver Transportation Authority (TransLink) Public Advisory Committee

## Dr. Michael Tretheway

President

InterVISTAS Consulting Inc.

Dr. Tretheway is President InterVISTAS Consulting Inc., and Executive Vice President and Chief Economist with InterVISTAS Consulting Group. A native of Chicago Illinois and Madison Wisconsin, he earned a PhD in economics from the University of Wisconsin. From 1983-1996, he served as Associate Professor of Transportation and Logistics at the Business School of the University of British Columbia. At UBC, his speciality was aviation economics and management (carriers and airports). He has recently been re-appointed as an Adjunct Professor in the University's Operation and Logistic Division at the Sauder School of Business. Dr. Tretheway has written extensively in the area of air transport including five books and 40 scholarly papers on airline and airport economics, globalisation, deregulation and privatisation. Dr. Tretheway joined the executive management team of the Vancouver International Airport Authority, where he was Vice President, Marketing. In 1997, he co-founded InterVISTAS Consulting. Dr. Michael Tretheway is widely considered as a leading transportation economist.

### KEY AREAS OF EXPERTISE

- Airport Economics
- Forecasting
- Economic Impact, Cost Benefit and Multiple Accounts Analysis
- Airport business planning and financing
- Marketing

### REPRESENTATIVE ADVISOR CAPACITY

- Consultant to **U.S. Civil Aeronautics Board**
- Responsible for delivery of services to roughly 40 airports for **development of air services**, including, among others, New Orleans, Metro Washington Airports Authority, Government of Puerto Rico, as well as airports in Europe, South America, New Zealand and Canada
- Consultant and **expert witness on aviation and transportation economics** before the U.S. Circuit Court, the U.S. Surface Transportation Board, the European Commission, the Australia Consumer and Competition Commission, the New Zealand Commerce Commission, the High Courts of New Zealand and Australia, various labour arbitration panels, the Canada Transport Agency, and the Canadian Competition Tribunal
- Expert in **aviation forecasting and traffic analysis**. This has included forecasts developed for investors and due diligence forecast reviews for major banks and other financial investors
- Consultant to and **expert witness for several airlines**, including American, United, Qantas, Comair, Cathay Pacific, British Airways, Air New Zealand, SAS, Lufthansa, Canadian, IATA, as well as charter and regional carriers
- Fellow, Australian Bureau of Transport and Communications Policy. During this period he advised the Government of Australia on alternative **airport governance structures and alternative privatisation strategies**

## SELECTED AIRPORT EXPERIENCE

- Strategic Advisor the President, and later Vice President Marketing, **Vancouver International Airport Authority** (1994-1997)
- Major contributor to the **APEC Congestion Points Study Best Practices Manual**, including sections on land transport access to airports and intermodal connections, and environmental management
- Developed computer simulation of **effects of peak load pricing** on airport traffic and revenues
- Developed successful proposal for the **privatisation of the Hamilton International Airport** (Canada). Subsequently developed strategic marketing plan and implemented marketing initiatives which resulted in airport climbing from 67th rank in terms of passengers handled to 10th
- Expert witness in Federal Court proceedings regarding Government of Canada contract cancellation for **Pearson Airport Development Corporation**. Testimony involved determination of airport rates of return and financial risk (Beta analysis)
- Designed pricing policies for the **Bermuda International Airport**, among others
- Assisted **Auckland International Airport** (New Zealand) in price regulation review and financial implications
- Assisted **Wellington International** in defence from suit launched by hire car tenants
- Developed **small airport pricing policies** which stabilised revenue streams
- Conducted or supervised air **service and cargo marketing programs** for roughly 30 airports in the U.S., Canada, Europe, Latin America and the Caribbean
- Developed **financial business plans** for 5 foreign trade zone initiatives
- Annual **business plan review** engagements for several airports
- Used by several bond rating agencies for establishment of **airport bond ratings**
- Advisor to several investment firms on **aviation investments** (airport and airline)

## SELECTED ECONOMIC IMPACT STUDY EXPERIENCE

- Economic impact studies undertaken for roughly 15 airports, including **Vancouver, Melbourne (Australia), Lamezia (Italy)**. Dr. Tretheway's methodology was cited by the former chief economist at ICAO as being the recommended methodology for measuring airport economics.
- Economic impact studies undertaken in other sectors, including tourism, ports, the mining industry, the **2010 Winter Olympics** Organising Committee, and the film and television production industry.
- Defended economic impact methodology in the Federal Court in a suit brought against the airport by resident living in noise impacted areas.

## SELECTED PROFESSIONAL AIRPORT PAPERS

- Airport Economics from Pergamon Press
- "Measurement of the Social Marginal Costs at a Congested Airport: An Application to Toronto International Airport"
- "The Concept of a Critical Mass Airport"
- "Pricing Principles for Airports"
- "A Study of Peak Period Pricing with an Application to Toronto International Airport"

- "A Study of Economic Multipliers and their Application to the Economic Impact of Airports"
- "Giving Airports an Incentive"

### **EXPERT WITNESS TESTIMONY**

- The U.S. Interstate Commerce Commission
- The U.S. Circuit Court
- Australian Trade Practices Commission, the Australian Competition Tribunal, the Australian High Court
- The Federal Court of Canada, the Canada Transportation Commission, the Canada Competition Tribunal, the Royal Commission on Passenger Transportation, the House of Commons Standing Committee on Transportation
- New Zealand Commerce Commission, New Zealand High Court
- South African Civil Aviation Tribunal
- Commission of the European Communities, DG4
- The Government of Hong Kong
- Several labour arbitrations
- Several commercial rate arbitrations

### **EDUCATION**

- Doctorate of Economics, University of Wisconsin (1981) Thesis Titles: "Productivity Growth and Returns to Scale in the U.S. Trunk Airline Industry, 1972-1978". Major field: econometrics, minor field: monetary economics.
- University of Wisconsin-Madison, M.S. (Economics) (1978)
- University of Wisconsin-Milwaukee, M.A. (Economics) (1976). Thesis: "The Velocity of Money: Evidence from Commercial Banking data."
- University of Wisconsin-Milwaukee, B.A. (Economics, summa cum laude, included courses in BBA program to 4th year level) (1974)

## Richard Mudge

Vice President  
Delcan

Dr. Mudge is a recognized expert in the economics and finance of all modes of transportation. He has held a series of management positions as a transportation consultant. These include co-founder, President, and Chairman of the Board for Apogee Research. Previously he directed the transportation policy group for the Congressional Budget Office and worked in applied research at the RAND Corporation. He currently serves as Vice President for Delcan and helps to lead the firm's work in economics, finance, technology and strategy.

Dr. Mudge's consulting clients are usually decision makers, whether from public agencies or private firms. Much of his work covers technology -- including the development of market forecasts and business strategies. Dr. Mudge's work often involves the changing market place for transportation, including forecasts for future markets. When prepared for public sector clients, they usually assess the economic and social impacts. When performed for the private sector, they incorporate forecasts of profits and return on investment as well as competitive market assessments.

### PROJECT EXPERIENCE

- **Bipartisan Policy Center, National Transportation Policy Project.** Dr. Mudge led a team to develop performance metrics to evaluate programs of transportation projects and then to track performance over time. Work involved a critical review of existing literature to determine the relative strengths and weaknesses of metrics in six categories: economic benefit, mobility and accessibility, measurement of transportation costs and benefits, safety, revenue streams, and national connectivity.

The work on economic impacts focused on accessibility as the key summary measure. This work built on a review of the literature on economic development and the role of transportation in stimulating productivity growth. The project developed a number of practical ways to implement accessibility, both on an urban and regional basis. Dr. Mudge's team also developed metrics for regional and national connectivity.

- **Texas Department of Transportation, Texas Statewide Long Range Transportation Plan, 2010.** Dr. Mudge provided the lead technical support for the recent Texas Statewide Long Range Transportation Plan. His work focused on financial options; performance measures; and policy options.
- **Texas Department of Transportation, Texas Statewide Rural Transportation Plan, 2011.** Dr. Mudge serves as the lead economic and financial analyst for this statewide plan. This effort will complement the statewide long-range plan that Delcan completed in 2010, with an emphasis on the specific economic needs of rural Texas.
- **Economic Impact of Regional Passenger Line.** Dr. Mudge is currently leading a team to measure the economic impacts of a proposed non-profit regional rail line in rural Ontario. This project will assess the construction and developmental impacts of extending a current rail line.
- **Using Technology to Operate and Manage 21st Century Transportation Systems.** Dr. Mudge prepared a review of the management implications from full deployment of ITS as well



as other technologies (telecommunications etc.). This work was completed for NCHRP and also published by the Hudson Institute. Specific areas covered include the likely effect on operations, planning, design, finance, and interactions with the community.

- **Evaluation Frameworks.** Dr. Mudge has prepared several sets of evaluation tools. These have all taken a comprehensive look at the potential benefits and costs of new investment. His most recent work was prepared for Transport Canada and has been issued as national guidance. Dr. Mudge has helped to present these recommendations to conferences in England and Canada. Similar work has been prepared for the Federal Aviation Administration and an arm of the Transportation Research Board.
- **Congestion Reduction and Performance Measures.** Dr. Mudge recently led a comprehensive assessment of how to reduce traffic congestion. This work was completed for the Washington State Audit Office and provided an independent assessment of options without regard to the historical jurisdiction of individual agencies. This effort integrated policies that cover demand management, peak-period pricing, operations, technology, and targeted capital investment. Recommendations were made regarding ways to integrate evaluation measures into regional planning. A key part of this work was to show the difference between performance measures (good to do, but usually not action oriented) and performance management – where actions are linked with the ability to meet or not meet specific goals.

## Solomon Wong

Executive Vice President, Borders, Security & Planning  
InterVISTAS Consulting, Inc.

Solomon Wong is the lead consultant for InterVISTAS' planning group. In this capacity, he leads multi-disciplinary teams to develop integrated solutions in the field of transportation. He has participated in terminal review projects throughout the world. Furthermore he has innovated change to airport baggage and passenger processes. From building business cases for new concepts, to developing improved processes, Mr. Wong has built a solid reputation for the development of out-of-the-box strategies and solutions. Partnerships built for public/private sector interests from Mr. Wong's work have increased customer satisfaction and opened new market and revenue opportunities for clients. Mr. Wong is an urban planner by training and has worked on facility and master plans for transportation facilities throughout the world.

### Similar Project and Work Experience

- **Smithers Airport Business & Land Use Plan, 2009**  
Provided oversight to the development of a plan to improve revenues and land use allocation for the Town of Smithers Airport.
- **Kamloops International Airport, Vicinity Land Use Analyses (2008)**  
Solomon provided oversight a project to review 2006 NEF contours and forecast for 2015 with a proposed runway extension. The report also examined vicinity land uses around the airport, specifically focusing on current land uses and zoning designations within the existing, and a review of potential new noise exposure impacts derived from the proposed runway extension project.
- **Kelowna International Airport Master Plan 2025, 2005-07**  
Solomon led a project team to deliver a comprehensive outlook for commercial aviation services, land use planning and terminal development phasing. Mr. Wong led presentation of the plan to regional mayors and City Council approvals.
- **Vancouver Airport Authority, Airside Capacity Study (1999)**  
The Vancouver Airport Authority was evaluating the ability for simultaneous independent parallel operations for its runways in 1999. Mr. Wong authored reports and presentations to consolidate benefits analyses as well as documentation of reduction in block hour operating costs for airlines. Working with SIMMOD results, the output of the Airside Capacity Study was substantial improvements in airside efficiencies.

### Experience Record

#### 1997-present: InterVISTAS

Various positions, including analyst, senior analyst, project manager, and director. Currently Executive Vice President, Security & Planning, overseeing a team of 14 professionals to provide border analyses, transportation security and physical planning of facilities for clients.

#### Other Project and Work Experience

- **BC Ferry Services Strategic Plan, 2003**  
BC Ferry Services became a self-financing company in 2003 with a mandate to widen travel choices for users and to improve the quality of services. Solomon Wong project managed a

team to deliver a Strategic Plan for the new organization, including an assessment of all market opportunities, business models, routes and other issues (safety, security, environment, labour relations). The first strategic plan enabled the corporation to start its new relationship with the Provincial Government effectively and support a major rebranding exercise.

- **Vancouver Airport Authority, Cruiseship Passenger Processing (2000-present)**

InterVISTAS assisted in developing and advancing US Direct processes for cruise passengers travelling between lower 48 states in the U.S. to Alaska through Vancouver International Airport. Working with CBP, and facilitating flow processes and business case analyses, InterVISTAS supported a set of protocols that greatly simplified passenger processing and increased customer satisfaction.

- **Vancouver Airport Authority, Airport Vicinity Area Land Use and Population Density Planning (1998-Present)**

Mr. Wong has developed for the Vancouver Airport Authority geographic information systems models to analyze population and land uses. Working with the airport authority, he also participated in the development of new metrics for noise impact assessment, based upon the weaknesses of the federal NEF model.

### **Education**

- Master of Science in Planning, University of Toronto (1998)
- Bachelor of Arts (Honours), Urban and Economic Geography, University of British Columbia (1996)

### **Language**

- Proficiency in speaking, reading and writing of English is excellent.
- Proficiency in speaking Cantonese is excellent.
- Proficiency in speaking, reading and writing French is excellent.

## Jacqueline Kuehnel

Associate Consultant, Travel and Tourism

### KEY QUALIFICATIONS

- Travel industry executive with 25 years of experience in tour operating in the area of product development in the Caribbean and Mexico.
- Climate Change consultant with experience in strategic carbon management
- Corporate Social Responsibility consultant
- Lecturer on tourism and sustainability
- Published academic researcher on Corporate Social Responsibility and outbound Canadian tour operators

### EDUCATION

- MBA: ATHABASCA UNIVERSITY Center for Innovative Management – estimated completion December 2010
- CSR Certificate Program – University of Toronto - St. Michael's College —September 2009
- Strategic Leadership Certification: UNIVERSITY OF TORONTO - 1999
- Executive Development Program: YORK UNIVERSITY - 1990
- Travel and Tourism Diploma: CENTENNIAL COLLEGE – 1980

### EXPERIENCE RECORD

- JK CONSULTING ENTERPRISES (JKCE) (2004 – present) - Principal. JKCE offers consulting services specializing in the travel and tourism sector in areas of product development, sales and marketing. It also offers business solutions on climate change, sustainable business strategies and corporate social responsibility. JKCE works on an associate model and has agreements with the following organizations:
  - InterVISTAS Consulting Group (2008 to Present) [www.interVISTAS.com](http://www.interVISTAS.com)  
Associate Consultant - Tourism planning and development consultant.
  - Canadian Business for Social Responsibility (CBSR) (August 2007 to Present) [www.cbsr.ca](http://www.cbsr.ca)  
Senior Advisor Climate Change - Climate change, carbon management consultant and special CSR projects.
  - The CarbonNeutral Company (TCNC) (September 2004 to present) [www.carbonneutral.com](http://www.carbonneutral.com)  
Canadian Sales Associate Business development, end-to-end carbon management solutions and the provision of carbon offsets.
  - VOX International (2004 to Present) – [www.voxtm.ca](http://www.voxtm.ca) Business Consultant
  - Caribbean Tourism Organization (CTO) (May 2004 to 2010) - Management of special projects including event planning and sustainable tourism.

- WestJet Vacations (August to December 2006) - Developed processes and strategy for land product contracting to launch 34 Canadian and USA routes.
- Air Transat (March 2010) – Market analysis and proposal for the launch of adventure and specialty product in Ontario.
- Ted Rogers School of Management - Ryerson University Toronto (January 2007 to present) Sessional Instructor - Faculty of Hospitality Management. Lecturer for tourism and business courses to Bachelor of Commerce undergraduates.
- Baxter Travel Media (May 2006 to present) — [www.rttf.ca](http://www.rttf.ca) Conference Programmer - Content development for the Responsible Travel and Tourism Forum.

### **Other JKCE Projects:**

- Hotels Combined – <http://www.hotelscombined.com/> Research and writing of a Responsible Travel Guide and Hotel Green Guide (to be published October 2010)

### **SIGNATURE VACATIONS (1989 - 2004)**

- Vice President Product and Operations (2002-2004) Company Director and a member of the Executive Team, responsible for planning, developing, and implementing leisure travel products for the Canadian market. Responsibilities included hotel contracting and administration; hotel inventory, building, costing and pricing; air planning and scheduling; yield management and destination services.
- Senior Product Director (1995 - 1998) Reported to the President. Responsible for developing contracting plans for hotel and car rentals in southern destinations, Europe, Canada and USA. Managed a portfolio of 800 hotels in 45 destinations.
- Product Manager (1989 – 1995) Responsible for contracting and managing 90 hotels in 15 sun destinations. Developed new product lines that pioneered Central American destinations such as Belize, Panama, Honduras, and Liberia in Costa Rica. Introduced new Mexican resorts such as Los Cabos, Merida, Veracruz and Tampico.
- WARDAIR HOLIDAYS Product Manager (1986 – 1989) Responsible for evaluating and contracting new destinations in Mexico and the Spanish Caribbean. Managed a portfolio of 95 hotels in six resorts, and established Wardair Holidays' leisure product through strong relationships with hoteliers.

### **LANGUAGE**

- Proficiency in English is excellent. Also perfectly bilingual in Spanish and English and fluent in Italian and French.

## John Weatherill

Vice President, Route Development  
InterVISTAS Consulting Inc.

As Vice President, Route Development at InterVISTAS Consulting, John Weatherill holds responsibility for the management of projects in Europe, Asia, the Middle East and North America. Mr. Weatherill has extensive experience in strategic airline route planning, market share modelling, route profitability forecasting and airport incentive package development. He has represented airport clients in air service presentations and incentive negotiations with airlines throughout the world.

Mr. Weatherill has delivered keynote addresses on air service development, airline incentives and air bilateral policy at numerous industry events, and has led route development workshops in the United States, South Africa, Singapore, Malta, the United Arab Emirates and the United Kingdom. He is a contributing author to the *Air Service Development Manual for Regional Development Agencies* and the *Journal of Airport Management*, and is a guest lecturer at Thames Valley University in London.

### SPECIALIZED AREA OF EXPERTISE

#### **Airline Network, Airfare and Strategic Analysis**

Produces data analysis, strategic interpretation, and report writing related to the pricing, profitability and economics of airlines in Canada. Examples of this work include:

- The production of two Domestic Airline Price Monitoring studies for the **Canadian Transportation Agency**, including development of a model to track and evaluate changes in airfares over time and between routes;
- A detailed report on the factors of airline route profitability for the **Atlantic Canada Opportunities Agency**;
- A study on the current state and future of travel agencies and global distribution systems for **Transport Canada**;
- A study on the global trends in consumer behavior in the purchase of air travel for **Transport Canada**;
- Studies for the **Ottawa International Airport** and Transport Canada concerning the economic implications for airports of Air Canada bankruptcy restructuring;
- Ongoing market intelligence briefings to several airport clients in Canada and the United States, with a focus on strategic developments among North American airlines.
- Responsible for analysis, report writing and presentation of several airline support projects focused on route networks, pricing, traffic stimulation, and financial analysis. Clients include **WestJet, Windward Islands Airways and Peace Air**.

## Air Service Development (ASD)

Produces air service development reports and presentations for numerous airports in Canada, the United States, the Caribbean, Europe, Africa and the Middle East. Skilled in the calibration and use of the Planet traffic allocation model, providing a solid analytical foundation for ASD presentations. Responsible for strategic route planning, market share modelling, load factor analysis, route profitability estimates and the development and negotiation of airport incentive packages. Examples of this work include:

- **Charlottetown, Prince Edward Island:** Prepared detailed analysis of potential Northwest Airlines and WestJet Airlines services, including market share and load factor modelling, cost and yield analysis. Developed and negotiated comprehensive airline incentive packages resulting in the initiation of Detroit-Charlottetown and Toronto-Charlottetown air services.
- **San Juan, Puerto Rico:** Produced air service development presentation and participated in meetings resulting in new service by Continental Airlines, JetBlue Airways, American Airlines, US Airways, TransMeridian Airlines and others; coordinated communications efforts and developed incentive package in support of multiple new Puerto Rico air services.
- **Aguadilla, Puerto Rico:** Prepared successful proposal for Aguadilla Airport under the US DOT Small Community Air Service Development Program, resulting in the award of a \$626,000 ASD grant. Managed air service development initiatives in Aguadilla resulting in new air services to New York, Atlanta and Orlando, including the development and negotiation of a comprehensive airline incentive package.
- **Abu Dhabi, UAE:** led a comprehensive air service development strategy project, developed an ASD action plan and incentive program for the airport, provided ASD training and prepared detailed route analysis and business cases for several successful airline presentations.
- **Loreto Bay, Mexico:** Produced presentation package and developed route profitability forecasts used in creating an incentive package for Alaska Airlines, resulting in non-stop Los Angeles-Loreto air services.
- **Gander, Newfoundland and Labrador:** Produced air service development presentations for WestJet Airlines, maintained follow-up communications with the airline, conducted market share modelling, route profitability forecasting and airport incentive analysis. Resulted in the initiation of new Gander - Moncton air services.
- **Kamloops, British Columbia:** Developed detailed air service development presentation, including market share and financial analysis for Horizon Air, coordinated load factor guarantee and supported the establishment of a community-based airline incentive program, resulting in the initiation of Kamloops - Seattle air services.
- **Windsor, Ontario:** Conducted market research and analysis, conducted market share and load factor modelling, developed and presented air service proposal to WestJet airlines, resulting in new Windsor - Winnipeg and Windsor - Calgary air services.
- **Halifax, Nova Scotia:** Developed air service development presentation for WestJet Airlines service; participated in successful program that resulted in new Halifax - Hamilton air services.
- **Other Airports:** Directed air service development strategies and developed proposals for numerous airports in Canada, Europe, the Middle East and Africa, including market share and

financial modelling, airline meeting participation, and incentive program co-ordination and development.

### **Economic Impact Analysis**

- Co-produced detailed update studying the economic impact of the **Vancouver International Airport**, including the airport's contribution to direct, indirect and induced employment, wages, GDP, economic output and tax revenue.
- Provided analysis of local, provincial and federal tax contributions of firms and employees related to the **Port of Vancouver**.

### **Tourism Development**

- Provided quarterly industry intelligence reports to **Tourism British Columbia**, including detailed airfare, traffic, and seat capacity analysis, in order to quantify the effects of consolidation among Canadian air carriers.
- Provided Ticket Lift Survey analysis for **Whitehorse International Airport** Air Access study, and conducted tour operator surveys. Produced report on air traffic diversion and characteristics of travelers to/from the Yukon.
- Conducted research for and contributed to development of a five-year marketing plan for **Ski Banff/Lake Louise**, the joint-venture resort destination marketing and tour wholesaler group owned by the mountain recreation resorts of Lake Louise, Sunshine Village and Mount Norquay in Banff, Canada. Produced reports on market analysis and competitive air access, consumer analysis, and revenue forecasting.

### **EDUCATION/ACADEMIC QUALIFICATIONS**

- Bachelor of Commerce (Honors) in Marketing, University of British Columbia (2000).

### **EMPLOYMENT HISTORY**

Mr. Weatherill has over 11 years' experience in the aviation industry. Prior to joining InterVISTAS in 2000, he worked with WestJet Airlines Inc. at its Vancouver base. In 1998, Mr. Weatherill was employed as a marketing and advertising trainee at a firm in Bialystok, Poland.



## Howard Mann

Vice President, Policy and Market Analysis  
InterVISTAS Consulting, Inc.

Howard Mann is a specialist in bilateral government policy, passenger/border/security facilitation, and in air service development. Prior to joining InterVISTAS, he served with ACI-NA where he worked extensively with U.S. and Canadian airport members on a wide variety of issues including bilateral air service policy, domestic air service and passenger facilitation. Mr. Mann served as key liaison to U.S. and Canadian airports on ACI-NA's JumpStart program, U.S. passport and visa policy, U.S.-VISIT and various other CBP Issues. Mr. Mann has also worked with the U.S. Department of State, U.S. Department of Transportation and U.S. Department of Homeland Security on numerous occasions.

### SELECTED PROJECT & WORK EXPERIENCE

- Provides international **air service development support** for multiple U.S. airports and one Canadian large hub airport.
- Represents the **Association of Asia Pacific Airlines (AAPA)** in Washington, DC on various government affairs issues (security, facilitation, visa policy)
- Currently provides **regulatory and facilitation support** to both U.S. and Canadian airport clients
- Represented 51 U.S. airports at **bilateral air service negotiations** between the U.S. and foreign countries including China, Japan, Russia, Mexico, Vietnam, Philippines and Thailand (2002-2005)
- Plan, coordinated and managed **ACI-NA JumpStart** air service development program which resulted in record attendance each year. (2003-2005)
- Project advisor for consolidated ACI-NA Airport member comments for draft version of **CBP Airport Technical Design Standards** (2005)
- Project director for survey on parking policies for non-official vehicles of **U.S. Federal agency** employees at Canadian preclearance and U.S. airports (2005)
- Project Advisor on response to expanded presence of **U.S. Centers for Disease Control and Prevention** at US Airports (2004-2005)

### EDUCATION

- Bachelor of Arts, Dual Major Program – Business Management/American History, University of Pittsburgh (2000)
- Semester at Sea Program (Spring 1998 Voyage)

## Eugene Chu

Senior Project Manager  
InterVISTAS Consulting, Inc.

Eugene Chu has over seven years of experience in the tourism and transportation industries, specializing in strategic planning, tourism development and economic impact assessment. Mr. Chu has been involved in a wide range of different consulting assignments and projects at InterVISTAS, completing work for government and private sector clients in Canada, U.S., and the Caribbean.

### SELECT EXPERIENCE

- Strategic support for the development of **Tourism Vancouver's** 2008-2015 Strategic Plan including market research and analysis, market modeling, and workshop facilitation support.
- Development of **Tourism Richmond's** long-term strategic plan and accompanying 2008-2012 Business Plan including market research, key strategies, business approach and organizational recommendations, along with workshop and board retreat facilitation.
- Business plan for **Tourism Kelowna's** new Visitor Centre, including site selection, feasibility analysis, business approach and strategies, facilitation of board retreat.
- China and India market opportunity assessment for **Rocky Mountaineer Vacations**, including market research and analysis, stakeholder consultations, market evaluation and development strategies, and recommendations.
- Development of strategic marketing plan for the **City of San Antonio** targeted at the leisure and business travel markets from Mexico.
- Tourism strategic plan for **Puerto Rico Tourism Company**, including market research, review of tourism trends, SWOT analysis, stakeholder workshop and forum, vision development and strategic recommendations.
- Design of an ADS (Approved Destination Status) tour operator quality assurance program for the **Canadian Tourism Commission**.
- Conducted pre-feasibility study for **Kelowna Chamber of Commerce** on the viability of a convention centre for Kelowna.
- Completed nation-wide **Destination Marketing Organization (DMO)** benchmarking study for over 20 DMOs across Canada, examining organizational structure and staffing, budget allocation, revenue sources, returns on investment and operational efficiency.
- Completed strategic plan update for **Comox Airport** including outline of key issues, strategic priorities and action plan.
- Development of 2009-2013 strategic plan for **Halifax International Airport Authority**, including market research and analysis, workshop facilitation, strategic analysis and recommendations.

- Completed economic impact study for **Vancouver International Airport Authority** which highlighted total estimated airport impacts, and also included micro-economic impact of specific flight operations.
- Completed economic impact studies for airports in **Cranbrook, Comox, Kamloops and Prince George**.
- Development of socio-economic and environmental analysis for **TransLink's** 10-year capital plan.

## EDUCATION

- Bachelor of Commerce, Marketing Major, University of British Columbia

## **Sam Sugita**

Senior Analyst

InterVISTAS Consulting, Inc.

Samuel Sugita provides land use and transportation planning solutions to a variety of public and private clients. He has a background in geology and a strong foundation in community and regional planning. He has completed a wide array of land use planning, urban design and transportation planning projects in Canada and the United States. He has also worked with a variety of clients tailoring to the needs of the community and the local government. Mr. Sugita has worked on master plans, general/community plan updates, design guidelines and development standards for communities and resorts. This includes Southern California Association of Governments - Compass Blue Print Demonstration Projects, resort and community development for Lake Elsinore, Big Bear and Mammoth Lakes, as well as other plans for communities in Southern California. In addition to land use planning and development, Mr. Sugita has delved with developments around airports, completed transportation corridor studies and strategic plans for economic development. His interests lie in the field of urban planning and transportation, as a driver for sustainable and liveable community developments.

### **SELECT EXPERIENCE**

#### **Land use and Transportation Planning**

- As a member of the project team, assisted with the Mammoth Lakes North Village Planning Study, providing land use analysis for the continuation of resort development.
- Helped identify trail systems for the City of Big Bear (California), providing the connection between the town center, lake and business district. Additionally, prepared the necessary documents for a federal grant to fund the development of the Pine Knot Trail system.
- Developed a specific land use plan for a waterfront resort and marina called WatersEdge in Lake Elsinore California—a small town branding itself as the location for hosting extreme outdoor sports activities.
- As a member of a project team, took the lead in developing a design guideline and a set of development standards for a master planned community in Saudi Arabia. This guideline outlines the architectural styles for commercial and residential development in the different neighbourhoods of the master planned community.
- Lead the development of a design guideline and accompanying development standards to help re-create/re-brand the City of Calimesa (California). This involved land use analysis of the existing town center and phasing out long term strategies for developing their future downtown district.
- As a member of a team, completed Official Community Plan updates, providing the context for community vision and goals. Prepared the housing, transportation, connectivity, healthy living and sustainable community elements of the Official Community Plan. This included the City of Ontario (CA) and City of Clovis (CA) general plan updates.
- As a member of a team, completed an Environmental Impact Report for the City of Industry (California) for an NFL Football stadium. The elements completed include land use site assessments, transportation impact analysis, future population and housing needs.

- Competed in an international design competition called Magok Waterfront Park in Seoul Korea. Through proper land use programming, integrated parks and trail system, the site for transit stations, off-site facilities, commercial developments and the marina in this 290-acre waterfront park.
- Lead the planning team in completing a Bus Rapid Transit Corridor Study for the Southern California Association of Governments (SCAG). This project identified the feasibility of a bus rapid transit system traversing on a 28-mile route between Brea to Irvine California.
- Completed a study on re-inventing malls for SCAG. This project illustrated case studies in the evolution of a closed mall into lifestyle centers that re-defines the mall visit.
- Worked on the Arrow Highway Corridor study that passes through San Gabriel Valley and the City of Covina for SCAG. This project analyzed land uses along the corridor, identifying redevelopment opportunities in consideration of a town center and transit corridor.
- Completed an Aerropolis Integrated Land Use Compatibility Plan for the City of Leduc (Canada), providing the community with a long-term vision and land use concept that embodies identified issues of the local community.
- As part of the project team, completed an Airport Master Plan for Saint John (Canada), providing the airport with a long-term plan taking into consideration of aerodrome standards and aviation related regulations.

## **EDUCATION/TRAINING**

- Masters of Community and Regional Planning, University of Oregon, United States (2007)
- Bachelor of Science in Earth and Ocean Sciences (Geology), University of British Columbia, Canada (2004)

## Lynn A. Knight

Sr. Management Consultant, Economic Development & Tourism Strategic Planning  
Management Analysis, Incorporated (MAI)

A resident of the state of Virginia who has lived in New York, California and Saipan, Lynn Knight has 30 years of experience in tourism, economic development and integrated communications (market research, public relations, advertising, special events, promotions, branding and public affairs). Her professional experience in tourism includes hotel and tour company management, market research, trends and issues analysis, economic valuation of the industry, strategic business and industry-wide planning, site selection and development of new tourism businesses, improvement and revitalization of tourist sites, special events, destination promotion, and industry advocacy. Throughout her career, she has effectively promoted public-private partnerships between government, non-profit and private sector stakeholders to support tourism and general economic development.

### SELECT EXPERIENCE

#### Government Consulting, Public Sector & Non-Profit Tourism Experience

- **Project Manager for the “Tourism Master Plan for 2011-2015,”** a project funded by a technical assistance grant of the U.S. Department of the Interior for the U.S. Commonwealth of the Northern Mariana Islands, contracted to MAI. The project involves coordination of a 12-member team in Virginia, Washington D.C., Hawaii, Japan and the islands and includes a visitor exit survey of 5 U.S. and international markets, the development of a new destination branding strategy, and a strategic master plan with specific guidelines for implementation. (2011)
- **Project Manager for the City of Alexandria, Virginia’s economic revitalization and tourism project, “Efficiency & Productivity Study of the Torpedo Factory Art Center.”** The project contracted to MAI involved analyzing the governance, daily operations, human resources, promotion and economic contributions of this 35-year-old art center located in the heart of Old Town, Alexandria. The team conducted a tenant census, an online visitor survey, several focus groups, a SWOT analysis (strengths, weaknesses, opportunities, threats) and vetted the report’s findings at numerous public hearings. The published report included an economic valuation of this public asset in the context of the tourism economy. It identified opportunity costs for the use of the building as compared to \$16+M in annual economic benefits for the City. The report further documented proposals for the revitalization of the art center and identified specific recommendations to improve the visitor attractiveness and overall economic return of this historic cultural attraction. (2009-2010)
- **Project Manager, “5-Year Strategic Plan for Tourism 2006-2010.”** For the Office of the Governor of the U.S. Commonwealth of the Northern Mariana Islands and the Marianas Visitors Authority, the project involved gathering input from hundreds of public and private stakeholders in the region regarding the current state and future of tourism in the islands. The report analyzed historical data and the history of tourism in the destination, trends, challenges, strengths and opportunities. It evaluated the role of the government-run Marianas Visitors Authority in promoting tourism, as well as the condition of hotel facilities and recommendations for improvements. The study analyzed transportation access and air service uncertainty. It inventoried the destination’s attractions, including scenic ecotourism sites, cultural and historical

sites (both ancient and related to World War II battles), land and marine-based sports, golf courses, casinos and a range of annual community events. The publication also identified opportunities to develop new attractions. The strategic plan was launched with a publication, video, presentations for public meetings, and coordination of 9 public-private committees tasked with implementation. (Project duration 2005-2006, with implementation through 2008)

- **Chairman, Hotel Association of the Northern Mariana Islands.** Elected 3 terms to lead this non-profit professional association of resort hotels and allied members in the tourism industry from 2004-2009. Served as advocate and spokesperson on a wide range of issues affecting tourism: workforce development and the lack of tourism educational opportunities, the impact of rising costs in energy and water, the regulatory and tax environment, development incentives, and foreign tourist visa issues. Served as a paid consultant to the Association from 1987 to 2001. Developed the first industry-wide hotel statistics for the destination in 1994. Analyzed statistics and industry trends for territorial and federal government officials. Testified before U.S. Congress on tourism issues for the territory in Washington D.C.
- **Governor's Representative and Member, Marianas Integrated Immigration Task Force.** Working in collaboration with the Guam Visitors Bureau and Marianas Visitors Authority, prepared white papers and briefed federal policy makers on tourist visa issues relating to Chinese and Russian tourists. Developed economic valuations of the Northern Mariana Islands' tourism industry. Worked with the Department of Homeland Security, the State Department and Department of Labor on the tourist visas and foreign employee considerations in Washington D.C. Served as the Governor's representative in Washington D.C. full time for a 6-month period in 2009. (2008-2009)
- **Member, Governor's Tourism Task Force for the Northern Mariana Islands.** Studied and provided recommendations regarding workforce needs for tourism, including promoting training and job placement services for citizens. Issues encompassed labor shortages, unions and "right to work" legislation, foreign versus local hiring as well as the need for legislation regarding tour guide quality controls, certification and curriculum for tour guide courses. Studied destination enhancement needs involving beautification, holiday décor, signage, development and/or improvement of tourist sites. Efforts involved cultural heritage projects and sites, World War II historical sites, shopping areas, public parks, beaches and water quality of swimming areas. In coordination with elected leaders from the Executive Branch and the Legislature, also reviewed such issues as public land uses and government regulations affecting development and operation of resort hotels, golf courses and casinos. Promoted the airport with Ports Authority officials for potential new airlines. Appointed to travel with the Governor and key industry executives to Japan for destination presentations to airlines, tour companies and strategy sessions to improve inbound tourism. (2005-2008)
- **Chairperson, Niche Marketing Committee; member of Destination Enhancement Committee for the Marianas Visitors Authority.** Developed plans to promote U.S. military tourism, educational tourism, historical tourism, sports tourism and ecotourism. Represented the industry at U.S. Military, Welfare and Recreation (MWR) Travel shows to promote tourism to military families in the region. Destination enhancement and promotion projects included a vision/proposal for the development of Sugar King Historical Park, a mountain tramway,

ecotourism attractions (the annual flame tree blooming season, a new beach pathway for jogging/walking, an international nature photography competition, Kalabera Cave, Susupe Lake), and tourist-focused activities at a revitalized downtown area (a weekly night market and holiday promotions). Conducted fundraising among private sponsors for a permanent ecotourism exhibit and a children's play area at an international airport. Developed interpretive signage in several languages for a historical park. Promoted and secured significant film-making, television shooting and international celebrity endorsements of the destination involving Chinese, Japanese, Korean and Filipino talent. (2006-2008)

- **Tourism Development Consultant to the Mayor of the Island of Rota.** Created a set of strategies to improve the tourism industry in this ecotourism and sports destination entitled, "10 Quick Wins for Rota Tourism." (2006) Designed a full-color brochure, cataloging all of the islands' scenic, historic and sports attractions. Assisted the Mayor in launching the new destination slogan, "Nature's Treasure Island." Promoted the openings of two new hotels and the islands' first golf course. Handled public and government relations for a Manila Galleon shipwreck project involving a private salvage company off the coast of the island. (1997-1998)
- **Development Consultant to the Mayor of the Island of Tinian.** Provided ideas and aerial photography to identify key sites for future tourism development for golf courses, resort hotels and casinos (2000)
- **Project Team Member - "1999: Visit the Northern Marianas Year."** Developed a year-long tourism destination promotion for the Marianas Visitors Authority. The project involved creating and executing an extensive calendar of community events for the purpose of niche marketing. The events included a range of traditional and extreme sports, historical celebrations, ecotourism activities, arts and cuisine festivals. One event, "The World's Largest Dive," earned distinction in the Guinness Book of World Records. Several events created during the promotion have continued successfully for more than a decade, including the annual "Taste of the Marianas" festival, the "Flame Tree Arts Festival," and several extreme sporting events. (1997-1999)

## PRIVATE-SECTOR TOURISM EXPERIENCE

- **Vice President, Corporate Affairs, Tan Holdings Corporation, owning company of Asia Pacific Hotels and Century Tours** (2001-2008) For the largest privately-held firm in the Western Pacific, served on the executive team of the corporation and its affiliate, Asia Pacific Hotels. Significantly involved in the following hotel projects and operations:
  - **Fiesta Resorts** - Coordinated with the owners, managers and employees of two resort hotels on the islands of Guam and Saipan to successfully change the name and image of the resorts, which were previously bankrupted under former owners. The rebranding project included selecting a new name, developing all new internal/external signage, advertising and websites, planning and executing a calendar of special events, planning for development of expanded facilities and restaurants. Conducted visioning sessions with owners and management team to develop a new business concept of adding more local culture and entertainment within the properties. (2003-2007)



- **General Manager, Century Hotel** - Responsible for overall business planning and operations, profit and loss, human resources management, marketing, space utilization decisions, and maintenance of the 33-room hotel's ISO 9000 quality certification. (2004-2008)
- **Saipan Grand Hotel** - Actively involved with the pre-purchase due diligence, planning and renovation of the resort, which kept its name but changed its character and position within the destination by adding new entertainment facilities. (2004-2008)
- **Project Manager for The Spa at Fiesta Resort & Spa** – Was responsible for developing the business concept, décor and private label product line for a new luxury spa. Studied luxury spas in several competing international resort destinations. Consulted with the hotel management on space utilization, décor, sourcing of spa and retail items; developed the branding and packaging for private-label products. Hired professional spa staff. Managed grand opening marketing and advertising. (2003-2004)
- **President & Creative Director, Sunset Advertising Group, Inc.** Founded a full service PR and advertising agency serving the Western Pacific. Produced marketing, advertising, public relations campaigns and special events for regional clients including Coca-Cola, Verizon, Japan Airlines, the Hyatt Regency Saipan, Hotel Nikko Saipan; handled the grand openings of the Hyatt Regency Saipan - Regency Wing expansion, Rota Resort & Golf Course, Sunset Villa Hotel, and Lone Star Casino. (1987- 2001)

#### **ECONOMIC DEVELOPMENT EXPERIENCE**

- **Chairman, Comprehensive Economic Development Strategy Commission for the Commonwealth of the Northern Mariana Islands.** Appointed by the Governor. Led a 21-member project team to develop the “Comprehensive Economic Development Strategic Plan” for the years 2009-2013. Assessed community needs, attitudes and budgetary issues regarding improvement and/or development of critical infrastructure: airports, seaports, roads, public utilities, health, educational and tourism facilities. Conducted research and strategic planning activities encompassing a review of economic statistics, government documents and plans, interviewed government officials (utilities management, Mayors, Legislators, Governor's Cabinet members), conducted public meetings to gather feedback and inform the community. Presented the plan to government leaders and potential investors seeking business sites. (2007-2008)
- **Member, Governor's Strategic Economic Development Council (SEDC), Northern Mariana Islands** – Appointed. (2004-2008). Monthly public-private think tank for economic development policy
- **Guest Presenter, U.S. Department of the Interior - Island Business Opportunities Conference** –Speaker for conferences in the years 2006, 2007, 2009 on economic development incentives & tourism business opportunities. Promoted specific island development opportunities to American investors
- **Chairman, Overall Economic Development Plan Commission for the Commonwealth of the Northern Mariana Islands.** Appointed by the Governor. Led the development of a comprehensive plan for infrastructure development. (1996-1997)

- **President, Saipan Chamber of Commerce.** Spearheaded the publication of the organization's first business investment guide and "Jobs on Line" website. Worked with members of the Legislature to develop a business incentive package and tax incentive plan for significant business development (2000)
- **Consultant, 7-Year Capital Improvement Plan.** Subcontractor to Arthur D. Little in the research and writing of an infrastructure plan for the Northern Mariana Islands (1988)

## **EDUCATION**

- 2010 Economic Development Course – PennState Harrisburg, Pennsylvania
- Sponsored by the International Economic Development Council and Pennsylvania Economic Development Association
- Bachelor of Arts Degrees – Double Major in Communications & Psychology
- California State, University, Chico
- Business Management Courses – California State University, Hayward

## **MEMBERSHIPS IN PROFESSIONAL ORGANIZATIONS**

- International Economic Development Council – MAI representative
- National Council on Public-Private Partnerships - MAI

## **PUBLICATIONS AND DOCUMENTARIES**

- "Then for Now," - Co-author, book about the Chamorro Native Marine Scouts of WWII (2001)
- "Operation Forager: A Grateful Island Remembers" – Executive Producer, 50-minute video documentary on the World War II invasion of Saipan (1995)
- Pacific Daily News, Guam Business Magazine, Saipan Tribune, Marianas Business Journal – authored articles on golf course development, hotels, general tourism and economic issues (1987-2009)

## Dr. Tom Witt

### Director

#### Bureau of Business and Economic Research (BBER)

Dr. Tom S. Witt is the director of the Bureau of Business and Economic Research (BBER) in the West Virginia University College of Business and Economics. He also serves as a professor of economics at WVU and associate dean for research and outreach in the College of Business and Economics. Dr. Witt joined the Department of Economics at WVU in 1970. He received his BA from Oklahoma State University and his MA and Ph.D. degrees from Washington University (St. Louis).

Dr. Witt's research spans the areas of regional economics, public finance and policy, economic development, and energy economics. He has co-authored and edited two books, *West Virginia in the Nineties: Policies for Economic Progress* (WVU Press) and *Power From the Appalachians* (Greenwood Press) and has numerous publications in academic journals and research monographs.

He has served as principal investigator on nearly \$7 million in sponsored research from organizations including West Virginia Manufacturers Association, American Electric Power, Allegheny Energy, U.S. Environmental Protection Agency, West Virginia Development Office, West Virginia Division of Forestry, West Virginia Division of Tourism, The Greenbrier, West Virginia High Technology Consortium, West Virginia Oil and Natural Gas Association, West Virginia Department of Transportation, National Institute of Justice and West Virginia Legislature. He was appointed by Governor Manchin to the Unemployment Compensation Solutions Taskforce in September 2008 and serves on the Governor's Tax Modernization Project. He currently is a member of the Tourism Committee of the West Virginia Chamber of Commerce.

As BBER director he oversees a team of four Ph.D. economists/demographers, one masters level economists, and graduate/undergraduate assistants who conduct economic impact analysis, target industry studies, public finance and policy analysis and forecasts of the West Virginia economy. He organizes state and regional economic outlook conferences within West Virginia that attract upwards of 1,000 attendees annually. As associate dean for research and outreach, he oversees the College's Entrepreneurship Center, Center for Executive Education, Center for Chinese Business and Communications/Marketing.

In recognition of his economic research expertise, Dr. Witt was selected for *Who's Who in West Virginia 2000* by *The State Journal*, West Virginia's leading weekly business newspaper. Dr. Witt is a member of many professional associations including the American Economics Association and the National Association for Business Economics. He is a past president of the Association for University Business and Economic Research, a national organization of academic research centers and serves as AUBER's representative on the Council of Professional Organizations on Federal Statistics.

## Frank Knott

### Founder ViTAL Economy

Frank Knott founded ViTAL Economy (VE) in 1992 to provide a structured, yet flexible approach for underperforming rural communities to achieve economic, social and environmental prosperity. VE has served more than 40 regions throughout North America and Australia, helping regions build locally led, sustainable CED initiatives that would make them winners rather than victims of the global economy.

Frank Knott has led VE Journey's with tourism focus in Canada, Australia and the United States. The VE approach to tourism development is premised upon tourism being a central component of an investment attraction strategy that brings new capital into an economic region without placing significant additional burdens on the social infrastructure of the regions economy. Tourism clusters are formed to identify the unique tourism assets of a region and identify missing components in the value chain that when filled could expand the tourism experience for visitors and extend their stays. These tourism clusters develop measurable goals based on benchmarking each economic region against best practice regions with similar geographic, location and amenity assets.

Frank Knott has overseen the development of such tourism strategies as part of comprehensive community economic development initiatives in Nova Scotia and British Columbia, Canada, Washington State, California's Coachella Valley, Wisconsin, Southern Illinois and Tasmania Australia to name a few. This experience begins in 1992 and continues to the present.

These initiatives identified assets that made them uniquely attractive to regional and international travelers. Owners of these assets were organized into action driven work teams, which developed measurable goals including visitor growth goals, diversification and expansion of visitor origination locations, extending the stays of each visitor, development of visitor lifestyle experiences for different demographic groups and one-stop trip planning and booking mechanisms. Each strategy also included a broadband connectivity strategy that was focused on insuring the attractiveness of each region to 21st century always connected tourists. Each strategy included action team implementation plans inclusive of infrastructure and financing requirements and sources. Examples of specific strategies include an eco-tourism strategy in the early 1990's, which targeted attraction of eco-friendly European and Japanese tourists to Nova Scotia; an extended stay tourism strategy around the 2010 Winter Olympics for British Columbia; development of the Palm Springs Film Festival and an extended stay strategies for regional tourists visiting the Coachella Valley; development of a bed and breakfast network to expand occupancy from an average of 50% to 75% by using an online bed and breakfast broadband network registration and referral system for rural Wisconsin; agri-tourism strategies including 3 days festivals for Washington's north Olympic Peninsula and for Tasmania Australia.

## **Jim Haguewood**

### **ViTAL Economy**

Jim Haguewood has broad expertise and experience in the tourism industry in three areas; restaurant ownership, community tourism leadership and tourism economic analysis.

Jim Haguewood was born and raised in the tourism industry as his family owned and operated a full service 100+ employee restaurant in the gateway community of Port Angeles on the Olympic Peninsula of the State of Washington. From 1982 until 1998, Jim Haguewood was the President of Haguewood's Restaurant responsible for all operations and strategic analysis and planning in respect to the regional tourism industry. During the period he provided leadership within a number of community organizations including the Downtown Business Association, Chamber of Commerce, regional Tourism agency and the Lodging Tax Advisory Board.

From 2000-2005, Jim Haguewood was the Executive Director of the Clallam County Economic Development Council leading an award winning and nationally recognized asset based regional economic development initiative called Clallam networks. This initiative included a tourism component providing analysis and tourism strategic planning for regional gateway economies as the north Olympic Peninsula is a major entry point to Vancouver, Canada and a National Heritage Park, The Olympic National Park. This strategy also includes how tourism can be linked to other regional economic sectors such as agriculture to drive product sales and economic value.

Jim Haguewood has also worked closely with the Jamestown Tribe, 7 Cedars Casino & Resort, as a Board Member advising strategic planning and operations and also contracting business planning services for the development of a 150 room resort hotel in Blyn, Washington. The past five years have included the purchase and upgrades to a 18 hole golf course, development of an upscale convenience store and gas station near the casino and planning and design of casino expansion and resort hotel.

## Mark Madsen

### ViTAL Economy

For the past 18 years Mr. Madsen has been providing community & economic development and management consulting services. Those services include management of complex real estate development and construction projects; business management and economic analysis; community and economic development; entrepreneurial training and mentoring; and tourism product development. He has worked extensively with Native American and First Nations communities, where he was extensively involved through the Affiliated Tribes of Northwest Indians (ANTI) to develop regional collaboration for tribal tourism. Mr. Madsen served for four years on the board of directors of the Port Angeles Regional Chamber of commerce.

A member and Chief Economist of the ViTAL Economy Alliance, Mr. Madsen is currently facilitating economic community and develop initiatives in Southern Illinois (Connect SI), Maine (Mobilize Maine) and Vermont.

From 2005 through 2008 Mr. Madsen served the City of Port Angeles as City Manager, and holds BS, MS, and Phd. degrees in Economics. He has taught business and economics courses at Utah State University where he helped design a new master's degree program in Community & Economic Development at the request of then Governor, Mike Leavitt. Mr. Madsen taught Economic Development courses at Oklahoma State University while on a National Endowed Fellowship from the USDA.

# Appendix B: InterVISTAS Consulting Group Corporate Profile

## INTERVISTAS CONSULTING GROUP CORPORATE PROFILE AND SERVICES

The InterVISTAS Consulting Group ("InterVISTAS") is comprised of several integrated companies that provide a range of services to the world-wide travel and tourism industry. Within the United States, InterVISTAS operates through InterVISTAS Consulting LLC, providing services to clients in the areas of international and domestic air service development, travel and tourism marketing, security and border facilitation, international transportation policy, and a wide range of related services. InterVISTAS has a professional staff of 65 people, and has averaged \$12 million in billings each year over the past five years.

The InterVISTAS Consulting Group has its primary offices in the United States (Washington, DC); Canada (Vancouver BC); The Netherlands (The Hague) and the United Kingdom (London). For over 30 years, InterVISTAS professionals have successfully provided government and commercial clients with expertise in all key areas necessary for the successful completion of transportation and tourism assignments.

InterVISTAS' Washington, DC/Bethesda, Md. office is staffed with transportation, tourism, and economic development professionals. In addition, this office is the focal point for the firm's active involvement in air service marketing (passenger and cargo) for airports and communities throughout the U.S. It is also fully equipped to perform related economic, regulatory and policy development. Further balanced with a strong expertise in tourism development, InterVISTAS is well positioned to provide strategic guidance and implementation over a broad range of transportation-related efforts.

<http://www.intervistas.com/>

## BUSINESS AND STRATEGIC PLANNING

### PLANS AND FACILITATION

InterVISTAS helps clients establish a clear vision of the future and develop effective strategies to achieve their goals. Our strategic planning services provide concrete actions to overcome challenges affecting our clients' business – be it regulatory, process, community relations or competitive threats.

- Strategic Plans
- Business Plans
- Financial Analysis
- Meeting Facilitation and Community Consultation
- Policy Development & Strategic Advocacy
- Benchmarking and Competitive Analysis
- Tourism Development Strategies
- Governance and Performance Reviews

## **MASTER PLANNING**

### ***AVIATION, AIRPORTS AND PORTS***

InterVISTAS provides a wide range of aviation and airport planning services. We translate our clients' strategic objectives into action plans supported by comprehensive analysis and proven methodologies. Our technical skills include aviation forecasting, airport system capacity analysis, facility requirement identification, system integration and optimising solutions. Our products include:

- Master Plans
- Forecasts of Passenger, Cargo and Vehicle Movements
- Noise Exposure Studies
- Land Use Plans
- Commercial Development Plans



## **MARKET AND AIR SERVICE DEVELOPMENT**

### ***PASSENGER & CARGO***

InterVISTAS' airport clients can realise significant increases in both traffic and revenues by implementing carefully researched and planned market development programs. We analyse situations and develop detailed reports with recommendations or proposals for presentation to airlines on behalf of airports. Our services and products include:

- Air Access Studies
- Air Service Deficiency Studies
- Air Service Proposals
- Airfare Analysis
- Cargo Development Plans
- Foreign Trade Zone Development
- Strategies
- Cargo Marketing
- Marketing Plans
- Tourism/Destination Marketing
- Marketing Communications
- Marketing Commercial Opportunities

## **MARKET RESEARCH**

### ***ANALYSIS AND PLANNING***

InterVISTAS uses market research as a powerful tool to support and guide a wide range of commercial initiatives – from air service development and customer service enhancements at airports to tourism/destination marketing. Expertly conducted, scientifically targeted research provides airport decision-makers with the crucial information they need to identify key market opportunities, improve operational efficiencies, and maximise revenues. Our research and analysis services include:

- IATA Air Ticket Sales Data
- Air Travel Market Research & Travel Industry Surveys
- Customer Satisfaction Surveys
- Retail Surveys - Revenue Impacts & Brand/Product Development

## **ECONOMIC AND REGULATORY**

### ***STUDIES AND SERVICES***

InterVISTAS provides its clients with a comprehensive range of economic and regulatory services – services that assist airports and airlines with planning studies, forecasting, and litigation – including:

- Policy Development
- Economic Impact Studies
- Regulatory Services and Testimony
- Expert Witness Services

## **SECURITY & STRATEGIC FACILITATION**

### ***PLANS & ADVOCACY***

InterVISTAS assists clients with services to manage goods and passenger flows within a new security environment. An integrated approach using technology, process re-engineering and regulatory changes provides clients with the means to effectively manage risk and enhance customer service. Services include:

- Explosive Detection Systems
- Implementation Studies
- Security Research & Best Practices
- Security Intelligence & Issues Monitoring
- Pre-Clearance Issues Resolution
- Perimeter Clearance Advocacy & Pilot Project Development
- Strategic Facilitation Advocacy
- Security & Border Agencies Representation
- Process Re-Engineering

## Appendix C: ViTAL Economy

Since 1992, members of the ViTAL Economy Alliance have guided regional economies in 43 states and three countries to a brighter future using a proven blueprint, The VE Journey. The results of providing years of business, economic, change management and leadership skills has created billions of dollars in new, sustainable economic growth, hundreds of high performing businesses and the creation of thousands of high wage jobs.

ViTAL Economy over the past two decades has developed a portfolio of tools and processes that are applied to regional initiatives in a unique and specialized format. Think of this application as a “shrink wrap” approach as every regional economy is different and each community culture has different needs. The tools and processes include awareness seminars, economic benchmarking, assessment and analysis, asset based community economic development, innovation ecosystems, implementation strategies, collaborative finance and investment strategies and knowledge transfer.

ViTAL Economy Alliance is a for profit social enterprise with a mission and purpose to not just provide consulting resources to regional economies but rather teach community leaders how to take stewardship and management of their economy. This is accomplished through the knowledge transfer process by which ViTAL Economy Alliance members are embedded in the community during an initiative, counseling and advising hundreds of community and business leaders on the use of the tools and processes. This is how the ViTAL Economy Alliance has been able to produce significant and sustainable outcomes in rural America.

## Appendix D: Management Analysis, Incorporated (MAI)

### Management Analysis, Incorporated

2070 Chain Bridge Road, Suite 550, Vienna, VA 22182

(703) 506-0505

(703) 506-1436 facsimile

[www.mainet.com](http://www.mainet.com)

### ***Company Profile***

Since 1976, Management Analysis, Incorporated (MAI) has earned its reputation for delivering high quality consulting services and presenting real world solutions to the key issues facing government entities today. Over the past 35 years, MAI has served a wide range of government and private sector clients in all 50 states, 5 of the 6 U.S. territories, and numerous foreign countries.

Headquartered in Vienna, Virginia, MAI is a certified small business with more than 30 project managers, analysts, industrial engineers, and both full-time and contract specialists who are experts in such fields as economic development and tourism master planning. MAI's personnel are experienced in collecting and analyzing quantitative and qualitative data, conducting surveys, leading focus groups and SWOT analysis (strengths, weaknesses, opportunities and threats), facilitating public hearings, and making public presentations.

The company's services have aided governments in evaluating and developing policies, prioritizing investments in infrastructure, planning for new and emerging industries, and maximizing opportunities to leverage public-private partnerships.\*

### ***Relevant Experience***

Funded by a technical assistance grant from the U.S. Department of Interior, MAI is currently developing the new "Tourism Master Plan for 2011-2015" for an ecotourism and sports destination. This multi-faceted project in the Northern Mariana Islands includes a tourist exit survey of U.S. and international markets, a transportation study, the development of a new brand strategy for destination marketing, and the publication of a strategic plan with incremental steps to guide the public and private sectors in implementing strategies for industry growth.

Other recent economic development projects of MAI include an efficiency, productivity and revitalization study for a nationally-known art center in the City of Alexandria, Virginia. In 2009, MAI prepared the 5-year comprehensive economic development strategy (CEDS) and the "1<sup>st</sup> Economic Restoration Summit" for the U.S. Commonwealth of the Northern Mariana Islands. The Summit brought together government and private sector leaders to identify strategies for the development of four new industries. The initiatives developed in the Summit resulted in the creation of hundreds of new jobs within just one year.

In West Virginia, MAI was hired by the U.S. Army Corps of Engineers to complete a study of all of the recreational areas and boating facilities under its jurisdiction. The firm also prepared guidelines for the operation of a number of these facilities for the Corps.

*\*MAI's President Arthur L. Smith is the immediate past chairman of the board of the National Council for Public Private Partnerships(NCPPP). The firm is also active in the International Economic Development Council (IEDC)*

**Repeated Clients of MAI:**

- State of Michigan
- State of Missouri
- State of Maryland
- State of Georgia
- State of Virginia
- State of Vermont
- USDA Forest Service
- US Army Corps of Engineers
- Town of Leesburg, Virginia
- City of Alexandria, Virginia
- Doña Ana County, NM
- Wayne County, NC
- World Bank
- Sonoma County, CA
- Madison County, MS
- Knox County, TN
- St. Mary's County, MD
- Mt. Pleasant, SC
- Washington, DC
- Boynton Beach, FL
- U.S. Army
- U.S. Navy
- U.S. Treasury Department
- National Institute of Health
- Asian Development Bank

## Appendix E: West Virginia University Bureau of Business and Economic Research

Founded in 1949, the West Virginia University Bureau of Business and Economic Research (BBER) is the state's leading economic research center. With five Ph.D. economists and demographers, along with master level economists and graduate/undergraduate research assistants, BBER conducts research in the following areas:

- Economic development and impact studies
- Economic forecasts for West Virginia, regions of the state, and specific sectors
- Industry studies including tourism, bioscience, energy, wood products, and chemicals
- International exports
- Labor market studies
- State and local public finance
- Public policy studies
- Strategic planning in collaboration with the WVU Center for Executive Education

BBER publishes its work on its website [www.bber.wvu.edu](http://www.bber.wvu.edu) and through regular publications such as the West Virginia Business and Economic Review and the Morgantown MSA Monitor. BBER is the lead agency in West Virginia for the Federal-State Cooperation on Population Estimates, a program of the U.S. Bureau of the Census. BBER collaborates with other faculty within the College of Business and Economics on sponsored research programs. The College has also launched a new hospitality management program in collaboration with key leaders of the West Virginia hospitality and tourism industry.

The following are a listing of recent BBER tourism related studies:

- West Virginia Economic Outlook 2011-includes forecasts of the hospitality industry
- Economic Impact of West Virginia Casinos-currently in draft form as part of a larger study on the industry for the West Virginia Lottery Commission
- Funding Challenges and Opportunities in a Growing Tourism Destination: The Base of Broward County
- Tourism and the West Virginia Economy 2005-produced for the West Virginia Division of Tourism
- Tourism and the West Virginia Economy February 2007-produced for the West Virginia Division of Tourism

BBER has collaborated with MarketVision Research on studies on the economic impact of tourism in West Virginia and Ohio during the nineties. BBER has also produced numerous studies prior to 2005, including the following.

- A Study of the Potential for Economic Development in the Travel and Tourism Industry to provide New Employment Opportunities for the Chronically Unemployed, Randy D. Elkin and Randall S. Roberts, May 1980, 93 p.
- A Review of Travel and Tourism Statistics in West Virginia, Morteza Rahmatian, September 1987, 49 p.
- Analytical Measures of Travel and Tourism for States and Smaller Areas, the West Virginia Model, James M. Rovelstad, July 1974.
- An Analysis of the Increased Economic Contributions of The Greenbrier 1999, Randall A. Childs and Tom S. Witt, 2000.
- Appalachian Visitor Profile Report\*, February 1992, Gordon McClung and Rebecca Suter.
- Appalachian Tourism: Economic Importance, Character and Opportunities, Gordon McClung, June 1990, 82 p.
- Appalachian Travel Resources Inventory Report 1991\*, December 1991, Gordon McClung and Rebecca Suter.
- Appalachian Travel Resources Summary Report 1991\*, December 1991, Gordon McClung and Rebecca Suter.
- Behavior Based Marketing Strategies for Travel and Tourism: The West Virginia Model, James M. Rovelstad, September 1975.
- Creating Economic Growth and Jobs through Travel and Tourism, Patricia E. Goeke, ed., February 1981, 317 p. (Available from the National Technical Information Service).
- Economic Impact of Historic Preservation in West Virginia, Randy Childs, David Greenstreet and Tom S. Witt, September 1997.
- Economic Impact of The Greenbrier 1998, Randall A. Childs and Tom S. Witt, 1999
- Economic Impact of Mountaineer Race Track and Gaming Resort Fiscal Year 1998, Randall A. Childs, February 1999
- Feasibility of an Amusement/Theme Park in the State of West Virginia, Gordon McClung, et. al, September 1988, 54 p.
- Guidelines for Attracting Private Capital to Corps of Engineers Projects, G. Richard Dreese, Tom S. Witt, and James Rovelstad, March 1977, 208 p. (Available from the National Technical Information Services).
- Impacts on Tourism and Regional Development of Proposed Reservoir Projects in the Greenbrier River Basin, Tom S. Witt, Gordon W. McClung, David Greenstreet, August 1989, 261 p..
- Market Potential for a West Virginia Amusement/Theme Park, Gordon McClung, February 1989, 66 p.

- Ski West Virginia Campaign Advertising Conversion, Gordon McClung, et. al, September 1988, 34 p.
- The Economic Impact of the Mountain State Art and Craft Fair, Ripley, West Virginia, 1964 Raymond M. Haas, June 1965.
- Travel in West Virginia: Re evaluation for Growth in the 1980s, Patricia E. Goeke, August 1986, 173 p.
- West Virginia Area VI Partnership for Progress Travel and Tourism Economic Impacts - 1991, Gordon McClung and Rebecca Suter, June 1992, 28 p.
- West Virginia Area VII Partnership for Progress Travel and Tourism Economic Impacts - 1991, Gordon McClung and Rebecca Suter, June 1992, 28 p.
- West Virginia Area VIII Partnership for Progress Travel and Tourism Economic Impacts - 1991, Gordon McClung and Rebecca Suter, June 1992, 28 p.
- West Virginia Area IX Partnership for Progress Travel and Tourism Economic Impacts - 1991, Gordon McClung and Rebecca Suter, June 1992, 28 p.
- West Virginia Travel, 1975: Running Ahead of the Pack, James M. Rovelstad, 1976, 10 p.
- West Virginia Travel: Continuing to Prosper, 1975 76, Stanley J. Kloc, 1977, 10 p.
- West Virginia Travel: Dramatic Growth Demonstrates Travel's Potential for Future Economic Development, 1976 77, Patricia E. Goeke, 1978, 10 p.
- West Virginia Area V Partnership for Progress Travel and Tourism Economic Impacts - 1991, Gordon McClung and Rebecca Suter, June 1992, 28 p.
- West Virginia Area IV Partnership for Progress Travel and Tourism Economic Impacts - 1991, Gordon McClung and Rebecca Suter, June 1992, 28 p.
- West Virginia Area III Partnership for Progress Travel and Tourism Economic Impacts - 1991, Gordon McClung and Rebecca Suter, June 1992, 28 p.
- West Virginia Area II Partnership for Progress Travel and Tourism Economic Impacts - 1991, Gordon McClung and Rebecca Suter, June 1992, 28 p.
- West Virginia Area I Partnership for Progress Travel and Tourism Economic Impacts - 1991, Gordon McClung and Rebecca Suter, June 1992, 28 p.
- West Virginia Travel and Tourism Study - An Evaluation, J. William Schmidt and Raymond M. Haas, June 1965.
- West Virginia Travel and Tourism Economic Impacts - 1991, Gordon McClung and Rebecca Suter, June 1992, 38 p.
- West Virginia Travel and Tourism Study - The Potential Market, Raymond M. Haas and J. William Schmidt, June 1968.
- West Virginia Travel and Tourism Economic Impacts 1990, Gordon McClung, January 1991, 34 p.
- West Virginia Travel and Tourism Economic Impacts 1989, Gordon McClung, June 1990, 40 p.



- West Virginia's Image, Gordon McClung, et. al, September 1988, 39 p.
- Wildlife's Contribution to Tourism at West Virginia State Parks, Gordon McClung, September 1988, 24 p

This list excludes some publications produced for the Appalachian Tourism Research and Development Center, a joint program between Concord College and the WVU College of Business and Economics.



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