



the Tourism Company

Providing insight for the business of tourism



www.tourismco.com



Who we are

the Tourism Company is a management and marketing consulting firm specializing in the tourism industry. Established in 1994, the company is recognized as one of Canada's leading tourism consulting firms. The firm has been involved in assignments in all Canadian provinces and territories and in a broad range of international destinations including the United States, the United Arab Emirates, Montenegro, Bolivia, New Zealand, Morocco, Panama, and Jamaica. We attribute our success to two factors. Firstly, we are dedicated to servicing only the fields in which we feel expert - tourism. Secondly, the individual areas of expertise of each of our partners combine to create a company greater than the sum of its parts. While each of us shares a passion for the tourism industry we each bring individual talents, insights and experience to the task.

the Tourism Company provides the following consulting services to public, private and non-governmental organization (NGO) clients:

- Strategic destination planning and development;
 - Primary and secondary tourism market research including design and facilitation of focus groups, workshops and seminars;
 - Visitation demand forecasting;
 - Financial forecasting/modelling and economic impact assessment;
 - Market and financial feasibility studies for new or expanding tourism ventures including accommodation, attractions, events, and tour operations;
 - Preparation of tourism product/experience development plans – taking a project from concept through implementation -- marketing strategies and business plans;
 - Organizational development, including human resources training and development;
 - Strategic tourism marketing;
 - Development and implementation coaching of digital marketing strategies.
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Our clients

the **Tourism Company** is a Canada-based management consulting firm supporting private, public and non-governmental organizations seeking success in the tourism industry. A partial list of clients includes:

- Ontario Tourism Marketing Partnership;
- The Business Development Bank of Canada;
- Relais & Chateaux North America;
- Tourism Toronto;
- Inter-American Development Bank (Washington);
- New York State Development Corporation;
- Department of Canadian Heritage;
- Parks Canada;
- EMAAR Morocco;
- Sorouh Real Estate, Abu Dhabi;
- City of Regina;
- Quark Expeditions;
- Travel Manitoba;
- Waterfront Toronto;
- Mount Arrowsmith Biosphere Reserve Foundation;
- Fundacion Avifauna Eugene Eisenmann;
- Alberta Tourism, Parks and Recreation;
- Nunavut Tunngavik Inc. (Inuit land claim organization);
- Viking Trail Tourism Association;
- Government of Montenegro.

...and many small and medium sized tourism businesses.

High quality work is delivered consistently, with a strong commitment to customer service. As a result, many clients are repeat clients.

Relevant project experience

the **Tourism Company** is recognized as one of the most experienced tourism specialists in Canada in the area of destination area planning and development at a national, provincial, regional, and local scale. The three partners in the firm have combined tourism planning experience of more than 80 years. Over this time frame they have been involved in and/or responsible for a wide range of large geographic area destination planning and development assignments across Canada and internationally including the following examples:



- National Ecotourism Assessment for Bolivia;
- Provincial/State tourism strategies for the provinces of British; Columbia, Saskatchewan, and Manitoba, and State of New York;
- Regional Tourism Strategies in BC, Alberta, Saskatchewan, Manitoba, Ontario, Newfoundland/Labrador, Nova Scotia, New Brunswick;
- Regional Tourism Strategies in New Zealand, Cuba and Portugal;
- Strategic Ecotourism Planning work in the interior of Jamaica.

The partners also have extensive experience in strategic marketing for destinations, organizational planning, training program development, and project feasibility assessment and business planning. The firm is a Canadian

leader in planning for more sustainable models of tourism as evidenced by the firm's role as Project Managers of the award winning Arviat Community Ecotourism project which was chosen the Tourism for Tomorrow Community Award winner for 2014 and also as a TIDES Canada social change leader in 2013. The partners are members of the following associations:



- The International Ecotourism Society;
- Australian Ecotourism Association;
- Tourism Industry Association of Canada.

Others areas of expertise include:

- Adventure tourism;
- Mountain tourism and ski resorts;
- Ecolodges and resorts;
- Rural tourism;
- Cultural heritage tourism;
- Coastal tourism;
- Wellness tourism.

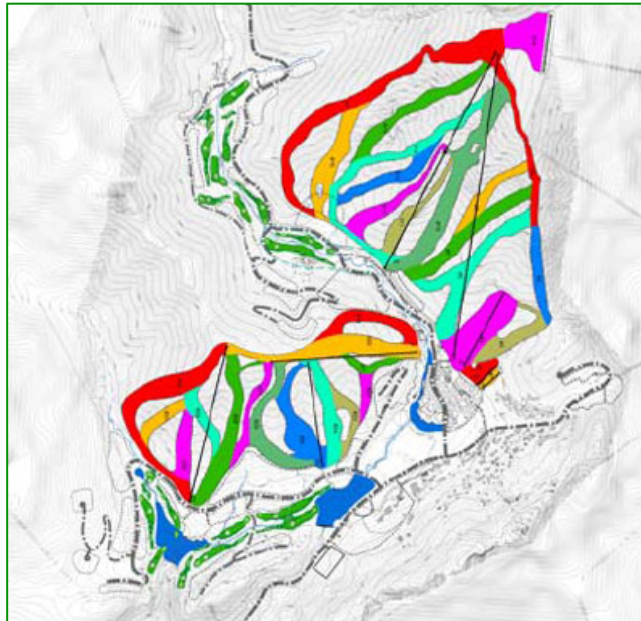
Mountain Resort Master Planning

Oukaïmeden Atlas Ski and Golf Master Plan

Client: EMAAR Morocco

Date: 2006 - 2008

Consulting Team: LANDInc in association with ^{the} **Tourism Company** & Alford Design Group



Project Descriptions:

As a tourism destination, Morocco was in a period of rapid development and expansion generating strong growth in market demand. From 2002 to 2006, international arrivals in Morocco grew a remarkable 47% from approximately 4.5 million to 6.6 million visits annually. Europe, particularly France, Spain and the United Kingdom, were the strongest origin markets, while Morocco was also attracting substantial numbers of visitors from many other European countries, North America, North Africa and the Middle East.

In 2006 the LANDInc team of Canadian consultants were retained by EMAAR to prepare a Master Plan for a 4-season mountain resort in the Atlas Mountains an hours drive outside of Marrakech.

The skiing opportunity at Oukaïmeden runs from a base area elevation of 2,600 m to a top elevation of 3,273 m on Jebel Oukaïmeden offering a total potential skiable vertical of 673 m. The smaller peak just to the northeast of Jebel Oukaïmeden offers ski potential as well and extends from a base elevation of 2,550 m to a top elevation of 2,865 m with up to 315 m of potential skiable vertical. Across the entire property the vertical rise of potential skiable terrain is 723 m. The base elevation of Oukaïmeden is significantly higher than most well known European ski resorts as well as many North American resorts, an increasingly important fact in an age of global warming.

Responsibilities:

^{the} **Tourism Company**, working as sub consultants to LANDInc were responsible for the upfront demand and supply analysis work that informed the direction for the development concept, ski area physical planning, financial modelling for the ski area component, and all tourism considerations in the design process.

Destination Planning and Development

New York State Multi-Season Tourism Destination Study

Client: New York State Urban Development Corporation in association with the Department of Economic Development

Date: 1992 - 1994

Consulting Team: Marshall Macklin Monaghan Ltd (with Mike Robbins as Project Manager and D'Arcy McKittrick as Project Consultant), working with Development Planning Services and Lane Frenchman and Associates



Project Description:

The overall objective of this assignment was to complete a strategic assessment of tourism opportunities throughout New York State and identify key multi-season destination attractions in each of the twelve tourist regions. The more specific objectives were:

- To assess regional, national and international tourism trends and the current state of the tourism industry;
- Assess and compare existing successful multi-season tourism destinations in NYS with analogous successful multi-season destinations in other northern climate areas;
- On the basis of market and resource assessments develop a listing of development opportunities and complete pre-feasibility level assessments of the higher priority projects requiring government assistance.

Responsibilities:

Mike and D'Arcy, two of the current partners in ^{the} **Tourism Company** were responsible for managing the team's efforts on this assignment, taking overall responsibility for the final recommendations.

Follow-up:

^{the} **Tourism Company**, established in 1994 was involved in a number of follow on assignments in New York State including:

- Preparation of a Strategic Marketing Plan for the New York State Canals;
- Preparation of a Tourism Development Strategy for the Finger Lakes Region;
- Niagara Falls Canada Heritage Master Plan (tourism component);
- A number of specific project feasibility assessments and business planning assignments.

Resort Master Planning

Al Fujairah Beach Resort & Umm Al Quwain Beach Resort, UAE

Client: Sorouh Real Estate, Abu Dhabi

Date: 2008 - 2010

Consulting Team: IBI Group in association with ^{the} **Tourism Company**



Project Description:

Umm Al Quawain Resort

IBI Group were retained by Sorouh Real Estate PSJC of Abu Dhabi to undertake a Master Planning and Architectural Design Concept exercise for a 28 ha waterfront site, zoned for resort and tourist accommodation uses, located in Umm Al Quwain in the United Arab Emirates. Work on this project focused on market analysis, resort master planning, 3-D massing and identification of massing/architectural precedents.

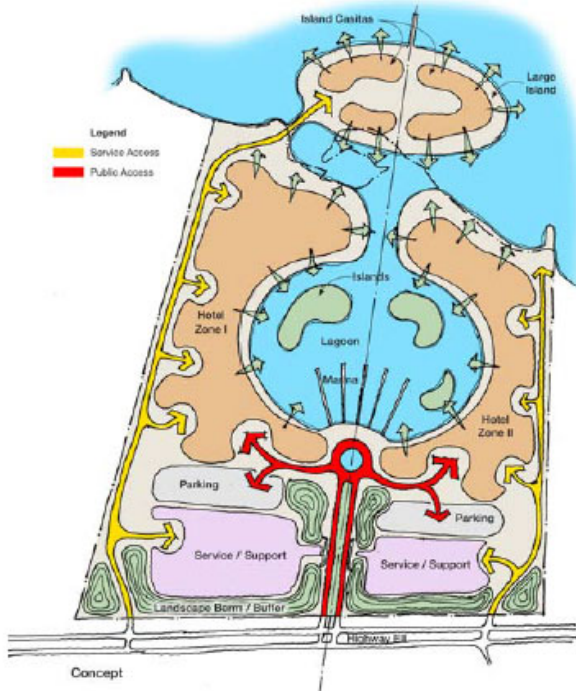
Alternatives explored for the site included three hotel options with a variety of other complementary uses including themed pedestrian retail streets, resort residential villas and condo / apartments, employee housing and other support services.

Al Fujairah Resort

The team of Canadian consultants was retained by Sorouh Real Estate to create a large scale contemporary master plan for a beachfront resort near Dibba in the northern corner of the Fujairah Emirate. The master plan for this 110ha development aimed at enhancing the waterfront as a major destination for residents, visitors and tourists by offering a mixed use residential, hospitality and commercial product built to international quality standards, enhancing the heart of Al-Fujairah and highlighting the cultural heritage of the city. The design team's objective was to create an unprecedented showcase product incorporating the principles of cultural, social, economic and environmental sustainability.

Responsibilities:

^{the} **Tourism Company**, working as sub consultants to IBI Group were responsible for the upfront market analysis work that informed the direction for the development concept.



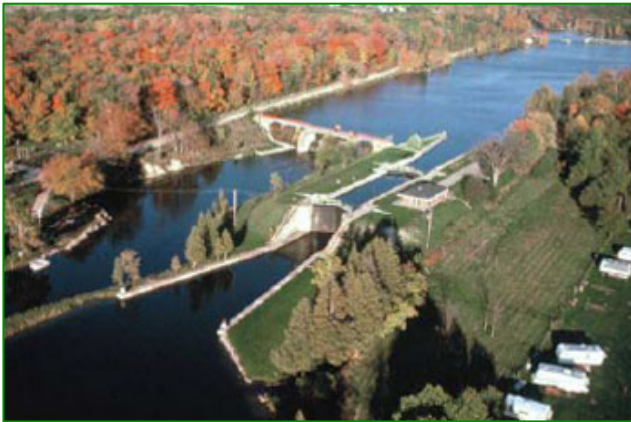
National Parks and Historic Sites

Parks Canada Trent-Severn Waterway Strategic Marketing Plan

Client: Parks Canada

Date: 1998

Consulting Team: ^{the} Tourism Company



Project Description:

^{the} **Tourism Company** were retained by Parks Canada to prepare a strategic marketing plan for the Trent-Severn Waterway. The project included an assessment of boating market demand, forecasting of boater use on the Trent-Severn Waterway, assessment of Waterway strengths, weaknesses, opportunities and threats, and extensive consultation with Waterway stakeholders.

The Trent-Severn Waterway, meandering 386 km along central Ontario has been named "one of the finest interconnected systems of navigation in the world". Successive groups of Native people have travelled the natural waterway formed by the Waterway Lakes since at least 9000 B.C. Around the 17th century, the waters were a significant transportation route for fur traders.

The beauty and variety of its scenery is one of the Waterway's greatest assets, traveling through lush farmlands, then the spectacular lake country and then up onto the Canadian Shield into Georgian Bay.

Follow-up:

^{the} **Tourism Company** has been retained by Parks Canada for many assignments since including:

- National Heritage Tourism Strategy for the Department of Canadian Heritage the parent of Parks Canada;
- Situation Analysis for an Ontario Regional Marketing Strategy;
- expand to Rideau Canal National Historic Site and World Heritage Site;
- Numerous interpretive centre planning assignments;
- Providing assistance to Veritas Canada in preparing a new Promotions Strategy for Parks Canada in 2013.

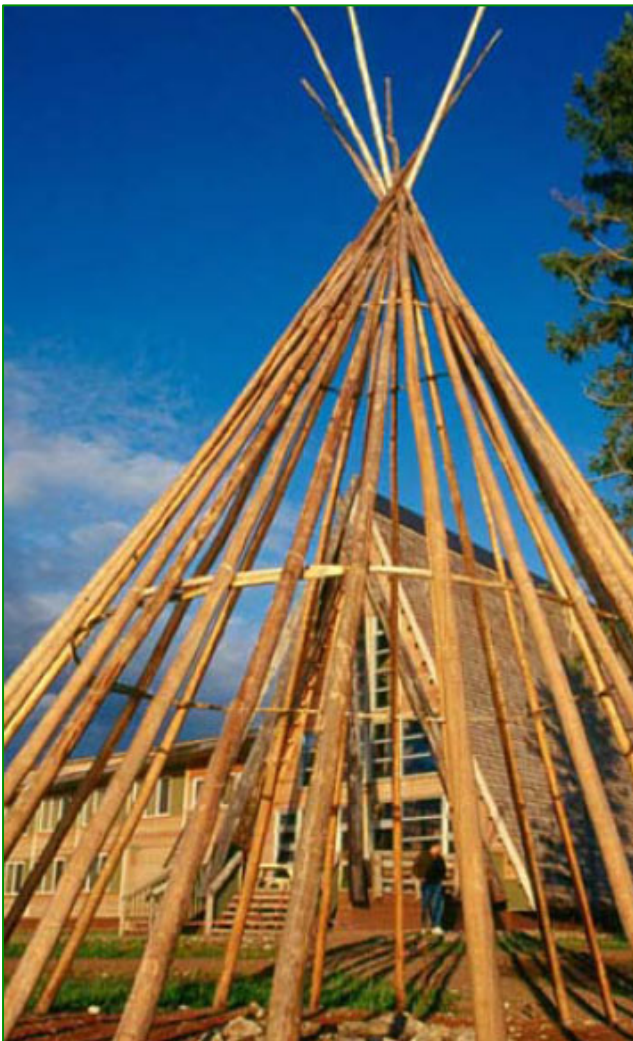
Ecolodge Business Planning

Cree Village Ecolodge Business Planning and Operational Planning

Client: Moccreebec Cree First Nation

Date: 1987 - ongoing

Consulting Team: ^{the} Tourism Company



Project Description:

This facility was developed over a five years period by MoCreebec Council of the Cree Nation located on Moose Factory island in north-eastern Ontario at the southern tip of James Bay. The Cree Village Eco-lodge became fully operational on July 15, 2000. The project is a world-class ecotourism project developed by, owned by and operated by an Aboriginal community, with the culture and values reflected in all aspects including a focus on energy efficiency.

In the early planning stages in 1997 ^{the} **Tourism Company** was retained to provide a third party assessment on the Feasibility Study and Business Plan prepared by MacLeod Farley & Associates. The firm then prepared and implemented a marketing plan for the introduction and ongoing marketing of the first designed and purpose-built ecolodge in Canada.

The Cree Village Ecolodge won the prestigious Air Canada Business of the year Award from the Tourism Industry Association of Canada in 2005.

Follow-up:

^{the} **Tourism Company** were subsequently involved with MacLeod Farley & Associates in the business planning and marketing for the Wa-sh-ow James Bay Wilderness Centre. The firm has been involved in, or responsible for a number of other ecolodge feasibility assessment and business planning assignments as follows:

- Eagle's Perch Ecolodge, Sagamok Anishnawbek First Nation;
- Vision Quest Ecolodge, Henvey Inlet First Nation;
- Lake Nipigon First Nation Ecolodge;
- Copper Thunderbird Ecolodge, Sand Point First Nation.

Regional Master Planning

Great Lakes Heritage Coast Coastal Protection and Sustainable Tourism Strategy

Client: Ontario Ministry of Natural Resources

Date: 2002-2003

Consulting Team: IBI Group in association with ^{the} **Tourism Company** and NONTA Consulting



Project Description:

The Ontario Ministry of Natural Resources retained IBI Group, as lead consultant, in association with ^{the} **Tourism Company** and NONTA, to develop a strategy to protect the coastal environment while enhancing and developing tourism opportunities based on local cultural and natural heritage values along the Heritage Coast (a 4,200 km stretch of coastline on the Great Lakes). The strategy for the Heritage Coast addresses the opportunities, identifies gaps, and investigates partnership opportunities for coastal protection and tourism and how this strategy is best managed for this vast geographic area. The team assessed how other national and international coastal and tourist regions have addressed economic development, with a particular focus on aboriginal tourism, tourist infrastructure, funding and implementation strategies and undertook an economic impact analysis of select recreation and tourism interpretive projects, identifying the economic benefits of employment and tax revenues as a result of implementing these projects.

The Great Lakes Heritage Coast encompasses 2 National parks, 1 National Marine Conservation Area, 2 World Biosphere Reserves, and 31 Provincial Parks.

Responsibilities:

^{the} **Tourism Company** was responsible for the strategic tourism planning work and industry consultation, consultation with the 25 First Nations, and the preparation of the Sustainable Tourism Strategy for the Coast.

Tourism Investment Attraction Strategy

Ontario Tourism Investment Attraction

Client: Ontario Ministry of Tourism

Date: 2008-09

Consulting Team: HLT Advisory and ^{the} **Tourism Company**



Project Description:

Ontario is transitioning from a manufacturing centre to a service-based economy. Tourism is becoming an increasingly important component of the economic development of the province and many of its communities. In the spring of 2008, the Government of Ontario initiated a process to establish a clearer path for tourism in the province. Dubbed the Ontario Tourism Competitiveness Study and led by former Minister of Finance Greg Sorbara, the Study had three objectives:

- To engage Ontario as a whole — not just the tourism industry — in a process to consider the future of tourism in [in Ontario].
- To raise the tourism industry's profile and create a platform for new initiatives
- To deliver a focused agenda for tourism — for the public and private sectors

As support to the Sorbara study, the Ministry of Tourism engaged several consulting firms to produce background papers on different aspects of tourism in Ontario. HLT Advisory and ^{the} **Tourism Company** were engaged to prepare a study on investment attraction related specifically to tourism.

Several jurisdictions were identified as part of this study with a view to determining best practices in tourism investment. Jurisdictions were selected from within North America (British Columbia, Kentucky, Mississippi, Pennsylvania and South Carolina) as well as further afield (Singapore, Montenegro, New Zealand, and the United Arab Emirates).

Responsibilities:

This assignment was a collaboration between ^{the} **Tourism Company** and HLT Advisory. ^{the} **Tourism Company** role included:

- Trends analysis and primary research;
- Review of the international tourism investment climate;
- Assessment of barriers and opportunities for Ontario;
- International case studies.

Sustainable Tourism/Ecotourism Planning

Ecotourism Market Assessment in the Hope River and Great River Watershed Management Units

Client: Inter-American Development Bank

Date: 1998

Consulting Team: ^{the} Tourism Company



Project Description:

The Government of Jamaica had been working with the Inter-American Development Bank to maximize the long-term social returns and sustainability of the natural resource assets of watersheds of Jamaica. Following an initial assessment by a local consultant the Bank decided to retain the services of a firm with specialized expertise in sustainable tourism to evaluate if commercially viable ecotourism developments could act as catalysts for broader watershed conservation initiatives in two key watersheds.

The purpose of this assignment completed for the Inter-American Development Bank (IDB) was to assess the market potential, identify possible sites, and prepare financial projections for possible ecotourism development projects in the Hope and Great River watersheds.

A second component of the assignment included preparation of a “manual” to guide the structuring of private/public partnerships as part of the IDB’s Watershed Management Program in Jamaica.

Follow-up:

Following completion of the Jamaica assignment the Inter-American Bank retained the services of ^{the} **Tourism Company** to complete a Sustainable Tourism Assessment for Bolivia.



Community-Based Tourism Planning & Development

Arviat Community Ecotourism Program

Client: Nunavut Tunngavik Inc (NTI) and Kivalliq Inuit Association (KIA)

Date: 2008 – 2014

Consulting Team: the Tourism Company as Project Managers coordinating a range of tourism specialists



Project Description:

In late 2008 the Tourism Company were retained by NTI to provide advise on the best use and allocation for the Conservation Areas land claim agreement. The firm was then retained to assist the community of Arviat in developing a community-based tourism program utilizing the funds from the land. Planning and capacity building for tourism began in 2010 and the program was launched in 2011 for the first few tour groups. Today the Arviat Community Ecotourism program is a recognized leader in sustainable tourism globally as evidenced by their selection as the Winner of the Tourism for Tomorrow Community Award in 2014, and being selected as a TIDES Canada Top 10 social change leader in 2013.



The Arviat Community Ecotourism program (ACE) is a community owned and operated cultural and wildlife tourism program. Arviat is a remote Inuit community located on the western shores of Hudson Bay in Nunavut, reached only by plane or boat. Arviat is a very traditional community with Inuktitut still being used as the primary language. Arviat has little economy and few economic opportunities and yet it is the 2nd largest community in Nunavut with a growing population, over 60% of whom are youth. Tourism and specifically ecotourism (non-consumptive) owned, controlled, and operated locally is now part of the community's future.



By 2013 the ACE program was involving as many as 35 - 40 *Arviarmiut* (the people of Arviat) through a variety of tourism performances and programs, and generating more than \$150,000 in tourism expenditures into the community.

Responsibilities:

the Tourism Company were the Project Managers throughout the planning, development and marketing of the ACE program with responsibility for the initial community consultation, facilitating the development of the market ready tourism programs, hiring the trainers for all tourism skills from cooks to eco-outfitters, assisting new start-up businesses and marketing the programs.