Formulation Of An
Ecotourism Policy Framework
For Manitoba

by

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Abstract

Ecotourism is considered to be one of the fastest growing segment of the tourism industry. The overall expansion of tourism, growth of specialty travel, and an increase in the public's awareness and concern for the environment are driving factors behind the growth of this market. The total direct international economic impact of the ecotourism industry in 1994 is estimated at $US166-250 Billion. A recent study done for Alberta and British Columbia estimates a potential ecotourism market, within seven U.S. urban centres alone, at 13.2 million travellers.

The term 'ecotourism' is frequently associated with a number of definitions, being variously described as a destination, a product, or an experience. In its simplest form, ecotourism is essentially a concept that revolves around "the development of a more meaningful and less consumptive relationship between visitors and their host environments and communities" (Scace et al. 1992). Implicit within this concept is the idea that: ecotourism activities be non-consumptive in nature; some degree of purposeful environmental or cultural education be present within the ecotourism experience; and the position of the host communities not only be respected, but also enhanced.

Manitoba, with its diversity of ecological and cultural reserves, has a tremendous opportunity to capitalize on the growing demand for ecotourism experiences. This study addresses that opportunity, presenting a policy framework for the development of ecotourism in Manitoba. In developing this framework, interviews were carried out with members of various stakeholder groups, including: government (Provincial and Federal), industry (operators, marketers, and associations), First Nations, and environmental non-government organizations.

Proposed objectives are developed for eight different policy areas, addressing issues relating to: sustainability; business viability; integrated resource management planning; infrastructure; leadership and cooperation; marketing; aboriginal involvement; and awareness and understanding. Individual policies are formulated to achieve each objective and suggestions are made for application of the policies.

Based upon priorities identified in the research process and examples of ecotourism

development efforts in other geographic regions, recommendations for the development of Manitoba's ecotourism industry and implementation of this document include efforts to: further develop the proposed policy framework; establish industry credibility within the marketplace; facilitate quality product development; and market Manitoba as an ecotourism destination.

Manitoba's current ecotourism industry is fragmented, with many existing lodges and outfitters trying to enter the market on a part-time basis. Outside of the Licencing Advisory Committee's guidelines, there are no policies in place to direct the development of Manitoba's ecotourism industry. The proposed policy framework represents a starting point for addressing this need; establishing the Province of Manitoba as a leader in the field of ecotourism development.

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1.0   INTRODUCTION

1.1   Background

Tourism is considered to be the largest industry in the world, employing 10.6% of the global workforce and producing an annual gross output in the area of $3.4 trillion (Global Paradox 1996). One of the fastest growing sub-sectors of the tourism industry is the area of 'ecotourism' (Hall et al. 1995).

Ecotourism can be formally defined as "tourism that involves travelling to relatively undisturbed or uncontaminated natural areas with the specific object of studying, admiring, and enjoying the scenery and its wild plants and animals, as well as any existing cultural aspects (both past and present) found in these areas" (Ceballos-Lascurain, cited in Milne et al 1995:25). The definition of ecotourism may encompass a variety of activities, however the concept surrounding the term itself, demands that these activities be ecologically, culturally, and economically sustainable.

To date, most of the research surrounding ecotourism in Manitoba has focused on the cataloguing of potential sites (Weaver et al. 1995). These studies suggest that Manitoba has the potential to develop a variety of ecotourism activities. In order for this potential to be developed in an effective and efficient manner, a number of key issues must first be addressed (Weaver et al. 1995). These issues include the need for; secured land lease agreements, a standardized certification system, educational initiatives and a revised business liability policy. Other provinces within Canada, including British Columbia, Alberta, Saskatchewan, Ontario, Quebec, Newfoundland, and Nova Scotia have already begun to address these types of issues by developing their own ecotourism development strategies and initiatives (Christ 1995).

More than traditional tourism pursuits, the development of ecotourism activities necessitates that a strategic planning approach be taken (Evans 1994). Without such an approach, uncontrolled ecotourism activities can result in the destruction of the same ecological, cultural, and economic environments they serve to promote. Risk of this destruction emphasizes the need for a comprehensive policy that can help guide the development of an ecotourism industry.

1.2   Issue Statement

Ecotourism has the potential to generate a variety of sustainable economic benefits for a host area. With a diversity of ecological and cultural reserves, Manitoba is in an ideal position to develop its own ecotourism industry. Presently, a policy for the development of ecotourism in Manitoba does not exist.

The formulation of an ecotourism policy for Manitoba would help to ensure the development of a sustainable ecotourism industry, allowing the Province to capitalize on a relatively untapped economic opportunity. The purpose of this study is to formulate a policy framework that facilitates the development of ecotourism in Manitoba.

1.3   Objectives

To facilitate the process of formulating an ecotourism policy framework for Manitoba, this study adopted five specific objectives. These objectives include the:

- identification of key issues addressed within existing ecotourism policies, guidelines and strategies developed for other regions;
- establishment of key issues to be addressed within an ecotourism policy framework for the Manitoba region;
- formulation of ecotourism policy objectives and components;
- development of policy application recommendations; and
- formulation of recommendations for the further development and implementation of the proposed policy framework.

1.4   Hypothesis

To assist with the direction of this study, and to contribute to academic knowledge in the subject area, two research hypotheses were established:

1.   *Manitoba's stakeholder groups will identify a common set of opportunities that enhance the development of ecotourism in Manitoba*; and

2.   *Manitoba's stakeholder groups will identify a common set of barriers that hinder the*

development of ecotourism in Manitoba.

1.5 Scope

The policy framework presented in this study applies to ecotourism activities in general; no attempt is made to differentiate between specific types of ecotourism activities. For example, the policy framework does not differentiate between whale watching activities and kayaking activities. Given the working definition for ecotourism adopted for use in this study (see Section 2.1.2), and keeping the general principles of ecotourism in mind, the policy framework applies to a variety of activities. A listing of activities commonly classified as ecotourism, and activities not commonly classified as ecotourism, is provided in Section 2.1.2.

The policy framework is intended to be specific to Manitoba as a whole. An attempt was made to incorporate concerns from all regions within the Province, however separate policies for individual regions are not presented.

In identifying key policy issues, the research process did not gather the opinions of every individual concerned with Manitoba's ecotourism industry. Instead, individuals from various stakeholder groups were solicited for their opinions regarding the development of ecotourism in the province. The gathered opinions represent a compilation of individual perceptions and are not necessarily representative of official stakeholder group positions.

While a thorough attempt was made to integrate the proposed policy framework with Manitoba's current policy environment, the complexity of issues raised in the interview process precluded an exhaustive examination of related policy and legislative initiatives. To facilitate a more thorough examination process, the documents/initiatives presented in Table 1 should be considered.

Throughout the policy framework, suggestions are made for application of the proposed policies. The suggestions are presented as general directions that may be taken when implementing the policies and do not apply to any one stakeholder group. Specific responsibilities for application of the policies are not contained within this document.

Table 1
Provincial and Federal Ecotourism Related Initiatives

Provincial	Federal
• Sustainable Development Act (Bill 61) • Sustainable Development Strategy • Parks Act • Wildlife Act • Fisheries Act • Forestry Act • Parks System Plan • new park management plans • initiatives to develop new provincial conservation easement legislation • initiatives to extend Manitoba's Network of Protected Natural Areas • Framework Agreement Treaty Land Entitlement	• National Parks Act • Historic Sites and Monuments Act • Parks Canada Operational Policies (including the National Parks Policy, National Marine Conservation Areas Policy, Canadian Heritage Rivers System Policy, and the National Historic Sites Policy) • National Park System Plan • National Park management plans • Canadian Environmental Assessment Act • Fisheries Act • Migratory Birds Convention Act • initiatives to develop a Canadian Endangered Species Protection Act • Canadian Bio-Diversity Strategy

1.6 Research Strategy Overview

A variety of methodologies were employed to satisfy the study's objectives. To provide a broad understanding of both the ecotourism industry and policy formulation processes, a literature review was first undertaken. Relevant literature was identified through the use of library software packages (e.g. Silver Platter), the Internet, and telephone discussions with knowledgable individuals and organizations (e.g. The Ecotourism Society). The review included an examination of ecotourism policies, strategies and initiatives being undertaken at regional, national, and international levels.

Personal and telephone interviews were then carried out to identify ecotourism development issues specific to Manitoba. Interviews were conducted with individuals from a variety of stakeholder groups, including: government (Provincial and Federal); industry (operators, marketers, and associations); Aboriginal groups (First Nations); and environmental

non-government organizations.

Issues raised during the interview process were formulated into a preliminary set of objectives and policies. Stakeholder input into these preliminary objectives and policies was then sought through written commentary and telephone interviews, and incorporated into a revised framework document. A focus group involving members from each stakeholder group was then conducted around the revised document, with the results being incorporated into the policy framework presented in this document.

1.7   Organization

This study is organized into seven chapters. The first chapter discusses the primary purpose of the study, its specific objectives and scope, and the general research strategy that was employed. Chapter two explores literature relating to ecotourism development and policy-making, providing a summary of key issues that need to be addressed within an ecotourism policy. Chapter three provides a detailed description of the research strategy used in this study, including the identification of stakeholders and a description of the research instruments. Chapter four details the current state of Manitoba's ecotourism industry, providing an overview of the environment in which Provincial tourism policy decisions are made. Chapter five discusses the results of the stakeholder consultation process. Chapter six presents the overall policy framework, including a discussion of objectives, policy components, and recommendations for application. Finally, chapter seven provides some overall concluding remarks and makes recommendations for the further development and implementation of the policy framework.

2.0   UNDERSTANDING ECOTOURISM POLICY

2.1   Understanding Ecotourism

Before formulating an ecotourism policy there is a need to explore the concept of ecotourism, clarify its principles, and establish a definition (Scace et al. 1992). In addition to satisfying these needs, this section provides insight into the profile associated with a typical ecotourist and discusses the potential costs and benefits associated with ecotourism development.

2.1.1   The Concept of Ecotourism

The literature commonly cites Hector Ceballos-Lascurain as the first individual to coin the term 'ecotourism' (Scace et al. 1992, Boo 1990, Ceballos-Lascurain 1996); defining it in 1983 as:

> "travelling to relatively undisturbed or uncontaminated natural
> areas with the specific object of studying, admiring, and enjoying
> the scenery and its wild plants and animals, as well as any existing
> cultural aspects found in these areas" (cited in Scace et al. 1992).

Evidence of the term 'ecotourism' being used prior to 1983 does exist, however, being found within a government publication dedicated to promoting 'ecotours' along the Trans-Canada highway (Peterson et al. 1980).

Since its initial inception into the world of tourism lingo, a number of alternative definitions have been developed for the term 'ecotourism'. Ecotourism has been variously described as a destination, a product, or an experience (Wight 1993). A sampling of some of the more popular definitions for ecotourism is provided in Table 2.

The varied content of these definitions is testament to the fact that ecotourism means different things to different people. Tour operators view ecotourism as an avenue to expand their business; governments view it as a strategy for achieving sustainable economic development; resource managers view it as a tool for preserving bio-diversity; and some indigenous groups view it as an opportunity to maintain community lifestyles (HLA and ARA 1994).

Ziffer (1989) suggests that no firm definition has been developed for ecotourism

Table 2
Popular Ecotourism Definitions

"Ecotourism is responsible travel to natural areas that conserves the environment and sustains the well-being of local people" (The Ecotourism Society 1993)

"Ecotourism is an enlightening nature travel experience that contributes to conservation of the ecosystem while respecting the integrity of the host communities" (Scace et al. 1992)

"...tourism with an emphasis on travellers being especially respectful of an area and as unobtrusive as possible" (Adler 1990, as cited in Backman et al. 1994)

"...purposeful travel that creates an understanding of cultural and natural history, while safeguarding the integrity of the ecosystem and producing economic benefits that encourage conservation" (Whelan 1991)

"...tourism to protected natural areas, as a means of economic gain through natural resource preservation, (that) ideally merges recreation and environmental responsibility" (World Wildlife Fund as cited in Government of Newfoundland and Labrador 1993)

"Ecotourism is nature-based travel to Hawaii's natural attractions to experience and study Hawaii's unique flora, fauna, and culture in a manner which is ecologically responsible, sustains the well-being of the local community, and is infused with the spirit of aloha aina (love of the land)" (Centre For Tourism Policy Studies 1996)

"Ecotourism is nature-based tourism that involves education and interpretation of the natural environment and is managed to be ecologically sustainable" (Allcock et al. 1994)

"It is a subset of nature tourism taken a step farther, with nature and tourism considered equal partners" (Farrell and Runyan 1991)

because "it is a complex notion that ambitiously attempts to describe an activity, set forth a philosophy and espouse a model of development", all within the same breath. The absence of a consistently used definition has led many individuals to simply equate ecotourism with confusion.

Adding to this confusion is the abundance of alternate terms that are often used interchangeably with ecotourism (Table 3). These terms range from being merely descriptive (e.g. "nature tourism" or "cultural tourism"), to those which imply value-based judgements (e.g. "alternative tourism" or "responsible tourism") (Wight 1993, Centre For Tourism Policy Studies 1996).

Table 3
Commonly Used Terms For Ecotourism

Nature Tourism	Travel With Mother Nature	Ecological Tourism
Adventure Travel	Appropriate Tourism	Sustainable Tourism
Low-Impact Tourism	Nature Travel	Nature-Based Tourism
Environmental Tourism	"Drifter" Tourism	Environmental Pilgrimage
Cultural Tourism	Environmental Education	Wildlife Tourism
Green Tourism	Nature-Oriented Tourism	Responsible Tourism
Ethnic Tourism	Special Interest Tourism	Community-Based Tourism
Ecoventures	Soft Adventure Tourism	Ethical Travel
Soft Tourism	Biotourism	Jungle Tourism
Anthropological Tourism	Ecotripping	Natural Areas Travel
Ecotravel	Environmental Conservation	Science Tourism
Nature Vacations	Primitive and Remote Travel	Resource-Based Tourism
Wilderness Tourism	Rural Tourism	Safari Tourism
Nonconsumptive Wildlife -	Socially Responsible Tourism	Alternative Tourism
Recreation	Endemic Tourism	Sanctuary Travel

Source: Valentine (1993): Scace, Grifone, and Usher (1991): Centre For Tourism Policy Studies (1996): Rinkinen (1997)

While there is great debate surrounding the most appropriate terminology or definition for ecotourism, there is general agreement about the concept it entails. The concept of ecotourism revolves around the development of "a more meaningful and less consumptive relationship between visitors and their host environments and communities" (Scace et al. 1992). Implicit within this concept is the idea that ecotourism allows for the integration of the environment and the economy (Scace et al. 1992).

Efforts to refine the concept of ecotourism have resulted in the establishment of numerous sets of principles and criteria (Butler 1991, Wight 1993). According to the criteria established by the Canadian Environmental Advisory Council (Scace et al. 1992), ecotourism must:

- involve a first-hand experience with natural, cultural and social environments;

- involve appropriate modes of transportation to natural areas and/or traditional cultural sites;

- heighten tourist awareness, understanding and respect for the area's natural and cultural

environment;

- be respectful and adaptive to the natural environment and local culture;

- involve knowledgable and responsible tour leaders;

- generate economic benefits and or knowledge that supports protection of the natural environment, and the socio-economic well-being of the host community;

- not be facility intensive;

- recognize that there are limits to the carrying capacity of the natural environment, and adopt a supply-driven management scheme;

- provide an educational experience for all persons associated with the activity;

- promote the adoption of an environmental ethic;

- acknowledge the interdependence of operators, hosts and resource managers and the benefits of partnership in resource stewardship;

- include local, grassroots involvement in all phases of development;

- provide economic benefits to the tourism industry;

- be developed in a manner consistent with sustainable development and the responsibilities that come with ecotourism;

- be conducted in areas where there is long-term security of the land-base;

- be a complete experience, where tourists are educated from the time they enter the travel office to the end of their trip; and

- involve codes of ethics and conduct to guide development and activities.

2.1.2   A Working Definition

For purposes of clarity and consistency it is necessary that a working definition for ecotourism be adopted. Since a consistently used definition does not exist, a working definition unique to Manitoba was adopted. The working definition draws upon recommendations by the Canadian Environmental Advisory Council (Scace et al. 1992), and incorporates fundamental elements occurring within ecotourism definitions worldwide, as identified by Allcock et al. (1994). These elements require that ecotourism:

- involve the natural environment (defined to include the cultural environment);

- allow for ecological and cultural sustainability;

- provide for education and interpretation; and

- generate local and regional benefits.

The working definition adopted for use in this study is:

> *Ecotourism in Manitoba entails an enlightening, nature-based or cultural travel experience, that contributes to conservation of the ecological environment, and is respectful of the economic and cultural integrity of the host communities.*

Implicit within this definition is the requirement that:

- ecotourism activities be non-consumptive in nature;

- some degree of purposeful environmental or cultural education be present within the ecotourism experience; and

- the position of the host communities not only be respected, but also enhanced. That is, benefits should accrue to the host communities.

The working definition encompasses a wide range of activities, including those that are:

- highly specialized *and/or* of more general educational interest (e.g. beluga whale watching *vs.* interpretive nature walks);

- delivered in small *and/or* large scale operational formats (e.g. customized bird watching tours *vs.* polar bear watching tours);

- occurring in remote *and/or* more easily accessible locations (e.g. Churchill *vs.* Riding Mountain National Park); and

- based on cultural *and/or* natural values (e.g. traditional Aboriginal ceremonies *vs.* wildlife viewing) (Allcock et al. 1994).

Given the working definition, and keeping the principles of ecotourism in mind, an ecotourism policy framework might apply to a variety of activities. A listing of activities commonly classified as ecotourism, and activities not commonly classified as ecotourism, is provided in Table 4.

Table 4
Designation of Ecotourism Activities

Ecotourism Activities		Non-Ecotourism Activities	
wildlife viewing	camping	hunting	lawn-bowling
canoeing	backpacking	fishing*	swimming
hiking/trekking	exploring	down-hill skiing	marathon running
walking	nature photography	golfing	parachuting
birding	sightseeing	snowmobiling	dirt-biking

NOTES:
1. *Those activities denoted with a* * *are recognized to be **incidental consumptive activities** (i.e. not considered ecotourism, but often happening in connection with the provision of ecotourism activities).*
2. *This list is intended for guidance only and should not be interpreted as a complete classification.*

2.1.3 Profile of an Ecotourist

To provide insight into the ecotourism market, numerous attempts have been made to try and profile the typical ecotourist (Machlis and Costa 1991, Ballantine 1991, Reingold 1993, Crossley and Lee 1994, HLA and ARA 1994). The majority of these attempts have focused on the identification of socio-demographic factors (e.g. age, income, occupation, and country of origin). Several common characteristics emerge from these attempts, describing the typical ecotourist as:

- highly educated;

- between 25 and 54 years of age;

- having a high level of financial earnings relative to the average tourist;

- belonging to nature related clubs/organizations; and

- being more likely to spend a greater amount of time in a single area than the average tourist.

While useful for providing a snapshot of the target market, these socio-demographic characteristics reveal little about the reasoning behind an ecotourist's behavior. To fill this need, researchers have attempted to assess the psychographic profile of ecotourists (i.e. their needs,

desires, attitudes, motivation, and benefits sought) (Fennel 1990, Eagles and Cascagnette 1992, Silverberg et al. 1994). An understanding of the psychological profile associated with these tourists is fundamental to the process of preparing appropriate tourism polices (World Tourism Organization 1995).

In an examination of psychographic studies and related literature, Keszi (1997) identifies a general set of psychological characteristics common among ecotourists. These characteristics describe the ecotourist as:

- having travel motives different than those of general travellers;

- having strong environmental values and an ecologistic attitude;

- extremely wary of environmental claims advertised by tour operators;

- seeking multiple activities in a vacation experience, some of which may seem contrary to their image (e.g. shopping and sun-bathing);

- having a strong need for information, both before and during travel; and

- seeking out experiences that provide a high level of value.

Although they have certain commonalities, ecotourists are also recognized as a highly diverse target market. Weiler and Richins (1993) point out that ecotourists differ along at least three distinct dimensions:

- their level of environmental commitment;

- the level of intensity in which they interact with the environment; and

- the level of physical challenges they seek in a tourism experience.

Despite these variances, the literature commonly identifies ecotourists as being interested in minimizing the impact their activities have on areas they visit. However, while ecotourists may be interested in minimizing their impacts on the surrounding environment, "there is an inherent danger in assuming the ecotourist is automatically an environmentally sensitive breed" (Cater 1993). Ecotourists face an ever present temptation to extend their activities beyond a sustainable level (Machlis & Costa 1991). Ecotourists may be tempted to behave in inappropriate ways because: they may only be visiting a destination for a few days, perhaps unlikely to ever return, and thus unlikely to care for the long-term repercussions of their

activities; and/or they may have paid significant dollars for their ecotourism experience, assuming some right to use the resource to their fullest desire (Cater 1993). It is these types of temptations that represent the potential costs of ecotourism development. Uncontrolled ecotourism activities can result in the destruction of the same ecological, cultural, and economic environments they serve to promote.

2.1.4   Potential Impacts of Ecotourism

Ecotourism is frequently touted as the ideal form of tourism, allowing for economic growth and development while protecting the environment upon which it is based. However, numerous examples of ecotourism activities worldwide show that this is not always the case (Table 5). Without proper management, ecotourism activities may generate negative impacts worse than those experienced with mass tourism (Cater 1993). Identifying and understanding the variety of impacts associated with ecotourism development is a critical step towards ensuring the formation and growth of a sustainable ecotourism industry (Andereck 1995).

The potential impacts associated with tourism development are well documented (Ziffer 1989, Boo 1990, Farrell and Runyan 1991, Hawkins and Roberts 1993, Jacobson and Lopez 1994, Burger et al. 1995, Tisdell 1996) (Appendix 1). A variety of direct and indirect impacts, associated with numerous tourism activities and environmental features, have been identified over the years (Andereck 1995). To provide a general understanding of the potential impacts associated with ecotourism development, a brief summary of tourism related impacts relating to key ecological, socio-cultural, and economic concerns is provided below (adapted from McIntyre n.d.):

Agriculture, Forestry and Fisheries

Impact: Increased demand for products; increased competition for land and water use.
Opportunity/Benefit: Job creation; competition for labor can improve salaries; recreational use of fishing boats can augment income; recreational uses of forests can prevent over-harvesting.
Problem/Cost: Land speculation; inappropriate land uses.

Table 5
Cases Highlighting Ecotourism's Negative Impacts

Amboseli National Park, Kenya	*"The sensitive soils of the Savannah are criss crossed with tire tracks where tourists in search of wildlife have offered drivers large tips to go off the roads.... The feeding and mating habits of the region's wildlife have been disrupted as animals react to [these] viewers. Some animals such as the cheetahs, become so disturbed that they frequently fail to feed, mate or raise their young."* (Olindo, 1991)
The Pantanal Wetlands, Brazil	*"In the Pantanal, tourism is an increasingly destructive force, coupled with the introduction of throw-away bottles, litter is now as common a sight as Kingfishers and Cormorants."* (Trent, 1991)
The Himalayas, Nepal	*[Because of tourist trekkers, the Nepalese] "are faced with a dwindling fuel wood supply and erosion caused by deforestation; garbage and human waste polluting the fare more sensitive land and water supplies of the lower elevations where most of the Himalaya's dwellers live; and a serious and increasing assault on the cultural self esteem of some ancient and extraordinary civilizations"* (Neuspiel, 1992)
The Highlands, Northern Thailand	*"Unless changes are made in the way tourist trekking operates, the rich cultural fabric of the highlands - made up of 20 distinct ethnic groups with rich animistic religions, traditions of herbal medicine and a history of self-sufficiency - could be washed away by the tide of over-exploitation."* (Shafroth, 1991)
Galapagos National Park, Ecuador	*"During the first ten years of visitation, the park's initial management strategies and management assistance worked relatively well with small numbers of visitors and continued to improve during the 1970's. Since then, regional economic woes and decreased Park Service budgets; increased pressures from the private sector; lack of political backing for park officials; and inadequate leadership, planning and monitoring have combined with the increases in visitation to create concerns about the sustainability of park resources and management capability."* (Wallace, 1993)

Source: Mandziuk (1994:13)

Infrastructure, Buildings and Roads

Impact: Increased use of land; can be irreversible.

Opportunity/Benefit: New infrastructure may benefit resident population; local building techniques and designs may be improved; use of local materials can improve the economy; beautification may occur.

Problem/Cost: Increased competition for prime lands; degradation of landscape and biological resources; blight and overcrowding.

Raw Materials

Impact: Increased use, processing and transporting of resources.

Opportunity/Benefit: Increased demand for resources can boost the local economy; increased demand for value-added products can provide additional work.

Problem/Cost: Depletion of natural resources; deterioration of nature and landscape.

Land Use Patterns

Impact: Tourism competes with the traditional uses of land.

Opportunity/Benefit: Tourism usually offers better economic returns than traditional land uses.

Problem/Cost: Displacement and involuntary relocation of residents, and established industries.

Consumer Activity

Impact: Increased demand for food, water, power and luxury goods.

Opportunity/Benefit: More options for resident population including more and better restaurants, improved water quality and supply, improved utility systems, greater availability of luxury goods, improved life-styles.

Problem/Cost: Depletion of resources; waste dependency on imported goods; disruption of traditional values; potential for inflation.

Population

Impact: Tourism is a competitive land user; bringing tourists into an area can attract outside investment and workforce.

Opportunity/Benefit: New employment opportunities may reduce an existing pattern of emigration to urban areas or abroad, especially by the younger generation; tourism can offer higher incomes to some; outside investments can include local partnerships.

Problem/Cost: Construction of tourist facilities may cause displacement and involuntary resettlement; foreign labor may displace local workers; concentrations of local residents around tourist facilities may cause cultural conflict.

Levels and Distribution of Income

Impact: Tourism as economic development generates employment and income in a society.

Opportunity/Benefit: A wider distribution of income; tourism may generate additional incomes in other sectors because of the multiplier effect; new job opportunities.

Problem/Cost: Changes in income levels may disturb social structure through an increase in disparities since not all benefit from tourism; in developing countries high incomes generally benefit skilled foreign staff only; seasonable tourism generates income or a limited period only.

Employment Levels

Impact: Tourism demands a high volume of labour with of different skill levels.

Opportunity/Benefit: Tourism generates employment, not only in the tourist trade but also in related activities; tourism businesses need a varied staff with different skills.

Problem/Cost: Construction staff is employed for a limited period only; competitive demand between tourism and local trades or industries for workers; untrained labour remains unemployed; in developing countries there is frequently a large influx of foreign workers; employment is often seasonal and thus generates seasonal unemployment.

Social Structure

Impact: Interaction between host population, tourists and foreign labour.

Opportunity/Benefit: Cultural enrichment; increased possibilities for social mobility.

Problem/Cost: Influx of tourists and foreign labour may disrupt basic social cohesiveness.

Recreation

Impact: Increased use of recreational resources.

Opportunity/Benefit: Development of more new facilities than the community could support on its own; upgrade existing facilities.

Problem/Cost: Fees may exceed local residents ability to pay; conflict over cultural differences.

Cultural Traditions

Impact: Interaction between host population, tourists and foreign labour.

Opportunity/Benefit: Preservation of traditions; local arts and crafts as a tourism product; stimulation of cultural pride.

Problem/Cost: Commercialization; loss of authenticity of artisan products and traditional artisan skills; modification of traditions to please tourists; erosion of social values.

Religious Beliefs

Impact: Interactions between host population, tourists and foreign labour.

Opportunity/Benefit: Stimulation and revival of religious traditions through interest by tourists; restoration of places of worship because of funds generated from tourism and pilgrimages.

Problem/Cost: Disturbance of places of worship and services by curious tourists; erosion of religious traditions when they become a commodity to market to tourists.

Archeological, Historical and Architectural Sites

Impact: Increased use of sites.

Opportunity/Benefit: Chance for preservation an conservation; enhance community esteem and awareness of roots; visitor interest and support may finance maintenance and rehabilitation.

Problem/Cost: Litter and vandalism; congestion; desecration; souvenir taking; use may exceed carrying capacity.

The variety of impacts presented above lends support to the argument that tourism development can not be analyzed in terms of a single activity. To fully understand the impacts associated with tourism development, the industry must be recognized as a complex web of

interdependent and inseparable activities, each one with its own associated impacts (Briassoulis and van der Straaten 1992). The complexity of impacts associated with tourism development is especially evident in the case of ecotourism, where tourists seek to explore a wide variety of ecological and socio-cultural experiences at an intimate level. Managing the potential impacts associated with ecotourism activities requires that a broad-based, comprehensive management approach be adopted.

2.1.5   The Need For Ecotourism Policy

Government involvement in tourism planning is necessary to promote the cohesive development of the industry (Harrison 1994, Bodlender et al. 1991). Government is responsible for setting out the parameters within which tourism may develop; guiding the private sector by clearly indicating what type and volume of tourism is acceptable, and in which locations. Without this involvement, the industry is likely to adopt short-term development initiatives that may threaten its very existence (Bodlender et al. 1991). This trend is especially evident in the ecotourism industry, where inappropriate development often takes place for the sake of capitalizing on a popular trend (Wight 1993). Ideally, a strategic planning approach should be taken to guide the development of an ecotourism industry.

While desirable, Echtner and Kirker (1995) caution that the formulation and implementation of a comprehensive strategic tourism management approach is a difficult task to complete. A lack of coordinated efforts between private organizations and government policy makers has resulted in the strategic management of most destinations being plagued with fragmentation, duplication of efforts and lack of a common vision (Echtner and Kirker 1995). The development of an ecotourism policy can help to address these problems, acting as an input into the overall planning process (Lang and Armour 1987).

The formulation of an ecotourism policy provides for a clear visualization of development values and goals; necessary inputs into the planning process (Bryan and Taylor 1990). An ecotourism policy also serves to establish realistic objectives, and the means for achieving those objectives; activities necessary for maximizing ecotourism's potential

contributions and minimizing it's potential costs (Bodlender et al. 1991). In fact, to a large extent, it is policy and legislation that determines the amount of natural and cultural resources available for ecotourism use (Williams 1992).

2.2 Understanding Policy

2.2.1 Defining Policy

An atmosphere of bewilderment often arises when the topic of policy is raised in discussion. As is the case with ecotourism, the term 'policy' means different things to different people.

Within the private-sector, policy is typically equated with "strategic guidelines for actions, which spell out what can and cannot be done" (Mockler 1972). Public-sector policy on the other hand, is generally defined in a broader context. Some people define public policy in terms of the choices that governments make (or do not make), while others choose to describe public policy in terms of the process it entails (Howlett and Ramesh 1995).

Echtner and Kirker (1995) define public policy as "a broad framework within which more specific strategies can be formulated and implemented". They point out that public policy must deal with a dynamic external environment made up of competing political parties, special interest groups, government agencies, legislative committees, and individual constituents. To be effective, public policy must be broad enough to bridge the competing and often conflicting demands of these groups; it is "purposely broad and vague". In sum, public policy is recognized to be a highly complex phenomenon involving numerous decisions by numerous individuals (Howlett and Ramesh 1995).

The role of public policy is to help ensure that the decisions of government adhere with their basic objectives (Lang and Armour 1980). To be effective in this role, all policies must contain certain basic elements (Henson *pers. comm.* 1996). These elements include:

- an overall goal;
- clearly defined objectives;
- instruments to address these objectives;

- the means for assessment; and

- the ability to be reviewed and repaired.

A policy goal is defined as a formally and broadly worded statement that represents long-term desires (Patton and Sawicki 1986). A policy goal serves to provide policy users with an overall direction that can be followed when constructing the solution to a problem (Henson *pers. comm.* 1996). When developing policy goals, consideration must be given to the possibility of conflict with the goals of other policies. The determination of possible conflicts assists policy makers in setting realistic objectives.

Objectives are defined as "focused and concretely worded statements about end states" (Patton and Sawicki 1986). In essence, they represent specific points of progress that are planned for in reaching a stated goal. Objectives are an essential component of an effective policy because they represent, in both temporal and spatial terms, the actions that will be taken to reach the policy goal (Henson *pers. comm.* 1996). Without agreed upon objectives, formal development is likely to be uncoordinated and unsatisfactory (Bodlender et al. 1991). To reach these objectives, policy instruments must be chosen.

Policy instruments represent specific tools that are employed to achieve the defined objectives (Trebilcock et al. 1982). The variety of policy instruments available for use is limited only by one's creativity. Typical policy instruments include: regulations, tax incentives, subsidies, and training programs.

2.2.2   Tourism Policy

Across most regions, few comprehensive policies and guidelines have been developed for tourism resources. More commonly, tourism resources have been guided by informally recognized strategies and guidelines (Williams 1992). Tourism policies that do exist have traditionally been associated with promotion, focusing on the generation of additional tourist flows. However, it is now widely accepted that in order to be effective, tourism policy must move beyond mere promotional considerations (van der Borg 1992).

Public tourism policy must serve to provide a vision of tourism's role in the economy

and in society as a whole (Ritchie 1979, as cited in Echtner and Kirker 1995). A tourism vision is comprised of two basic components: tourism philosophy and tourism mission. Tourism philosophy is defined as "a general principle or set of principles which indicate the beliefs and values of members of a society concerning how tourism shall serve the population of a country or region, and which act as a guide for evaluating the utility of tourism related activities"; whereas tourism mission is defined as "an explicit statement of the purpose which tourism development should serve within a country or region" (Echtner and Kirker 1995). In effect, the development of a tourism vision represents the creation of a formally stated policy goal; one of the first steps in the policy formulation process.

2.2.3   The Policy Formulation Process

The literature contains few studies that have examined the process of tourism policy-making, creating a great deal of confusion among those responsible for the task (Echtner and Kirker 1995). However, the tourism industry is not alone. Theory surrounding policy-making in general is rife with confusion and debate. Much of this confusion is due to the absence of a "monolithic policy process" suitable for addressing all types of subject-matter (Thomas and Adie 1987).

Theoretical Observations on Policy-Making

Howlett and Ramesh (1995) discuss several main bodies of thought surrounding the public policy-making process. One group of theorists argue that the nature of the political system itself acts as the major influencing factor on the decision-making process. These theorists focus on examining political structures and their links with society to determine the major influences on government decision-making. Other theorists believe it more valuable to concentrate on identifying the causal micro and macro level variables that influence policies. Alternatively, some theorists prefer to focus on policy outputs, examining their direct and indirect impacts on society.

Another group of theorists choose to focus on the content of policies (Howlett and

Ramesh 1995). Led by Theodore Lowi, this group theorizes that the policy-making process should be determined by the degree of conflict and coercion associated with the content of a policy. Lowi classifies policies, and their associated formulation processes, into four basic categories: distributive, regulatory, redistributive and constituent.

A distributive process involves decision-making that distributes benefits to certain groups on a highly individualized basis (Thomas and Adie 1987). The costs of these benefits are distributed across a larger population so that no clear winners and losers emerge from the process. As such, this process is associated with relatively low levels of political conflict. Subsidies that benefit particular regions or groups are often the result of distributive policy-making.

In contrast, a regulatory process involves more deliberate choices about which groups will benefit and which will be harmed (Thomas and Adie 1987). This process generates clear winners and losers, providing a greater incentive for more groups to become involved in the policy-making process. Policy created under this process is more often than not the result of group conflict.

A redistributive policy-making process is similar to the regulatory process, with the exception that fewer groups are involved in the conflict (Thomas and Adie 1987). Since this process frequently involves the redistribution of economic power, the conflict primarily takes place between society's haves and their have-nots.

Policy Cycles

While useful for understanding the various considerations associated with policy-making, the above theories provide little specific direction to those responsible for formulating policy. A number of individuals have tried to address this problem by breaking down the policy-making process into distinct stages. When linked together, this series of stages is commonly referred to as a 'policy cycle' (Howlett and Ramesh 1995). An example of a policy cycle model for the formulation of an environmental policy is provided in Figure 1.

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A Policy Formulation Process
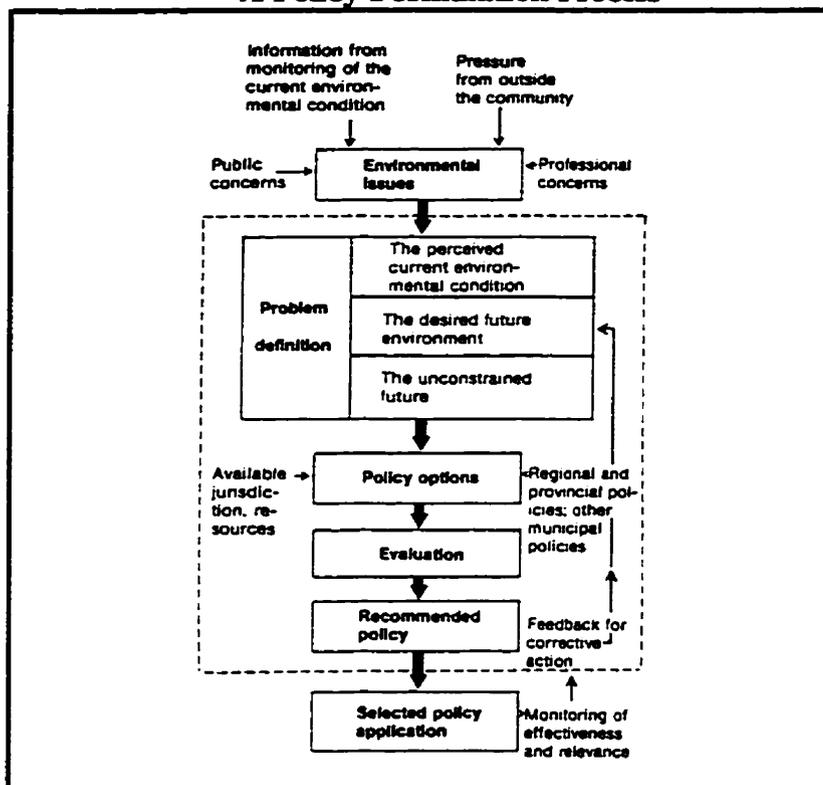
Figure 1
Source: Lang and Armour (1980:232)

The literature provides numerous examples of policy cycle models, each with their own interpretation of the basic policy-making stages. Howlett and Ramesh (1995) argue, however, that these models are all based upon one common operative principle, the logic of applied problem-solving. To clarify their argument, they equate the stages of a general policy cycle model with the phases of applied problem-solving (Figure 2).

In the general policy model identified by Howlett and Ramesh (1995) (Figure 2), the Agenda-Setting stage refers to the process by which problems are brought to the attention of government. The next stage, Policy Formulation, refers to the process of defining, considering, and accepting or rejecting options. Within this stage, feasible and unfeasible policy options are identified according to both real and perceived constraints. Howlett and Ramesh (1995) emphasize that this formulation stage rarely follows the well-organized and rational steps

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Formulation Of An Ecotourism Policy Framework For Manitoba

Five Stages of the Policy Cycle And Their Relationship to Applied Problem-Solving

Phases of Applied Problem- Solving		*Stages in Policy Cycle*
1. Problem Recognition	→	1. Agenda-Setting
2. Proposal of Solution	→	2. Policy Formulation
3. Choice of Solution	→	3. Decision-Making
4. Putting Solution into Effect	→	4. Policy Implementation
5. Monitoring Results	→	5. Policy Evaluation

Figure 2
Source: adapted from Howlett and Ramesh (1995:11)

proposed by academic theories. The Decision-Making stage involves choosing from among the feasible options identified in the policy formulation stage. Howlett and Ramesh (1995) identify three models of decision-making commonly employed to help make these choices: the *rational model*, the *incremental model*, and the *garbage can model*.

As its name implies, the *rational model* is based on the premise of a rational individual following a pre-described series of steps (Howlett and Ramesh 1995). Following these steps allows an individual to identify the most efficient option to satisfy a specific policy goal. While frequently employed, this model is often criticized for its unrealistic assumptions about the decision-making environment.

The *incremental model*, it is argued, more realistically approximates the behavior of decision-makers in practical situations. This model describes the decision-making process to be a political process characterized by bargaining and compromise. Decisions are arrived at by making "successive limited comparisons" with earlier decisions (Lindblom 1959). The decisions derived by this process represent what is politically feasible, rather than what is desirable.

Finally, the *garbage can model* represents a combination of the rational and incremental models. Developed by March and Olsen (1984), this model views decision-making as a non-rational process based on convenience and ritualized decision-making behavior. Decisions are made by policy actors who simply define goals and then go about choosing the means to address these goals. The process involved is quite variable, being contingent upon individual situations.

Howlett and Ramesh (1995) emphasize several important considerations associated

with the decision-making stage. Firstly, they emphasize that this stage does not represent the entire policy-making process. The decision-making stage represents only one component of the entire policy cycle, and is dependent upon the actions and results of the previous stages. Secondly, it is emphasized that the decision-making stage is not a technical undertaking. This stage represents a political process, where both 'winners' and 'losers' are created. Finally, they recognize that the degree of freedom afforded to decision-makers is often limited by a number of imposed constraints from both government and society.

The fourth stage of the policy model identified by Howlett and Ramesh (1995) refers to the means by which the government implements its policies. This stage involves generating, evaluating, and selecting appropriate policy instruments. Finally, the Policy Evaluation stage refers to the processes by which policy effects are monitored (Howlett and Ramesh 1995).

The Policy Sub-System

While it is important to understand the basic stages of the policy-making process, it is perhaps more important to understand who actually makes the policy. According to Howlett and Ramesh (1995), "policies are made by policy subsystems consisting of actors dealing with a public problem". These actors represent those individuals and groups involved in the policy-making process (Pross 1986).

A proactive policy-making approach will seek input from policy actors throughout the formulation process. Bryan and Taylor (1990) emphasize that a proactive, consultative approach to policy-making has several important advantages. Consultation with policy actors serves to reduce potential conflicts in the early stages of planning and decision-making. This reduced level of conflict helps to mobilize the actors to participate in change, generating an atmosphere of cooperative behavior. This cooperation, in turn, serves to reduce the costs associated with developing policy and improves the chances for successful implementation. However, while it is desirable for policy actors to be involved throughout the policy-making process, all of these actors need not participate in the policy-making process to the same degree (Howlett and Ramesh 1995).

Following the model presented by Howlett and Ramesh (1995), a large number of actors are commonly involved in the agenda-setting stage of the policy-making process. These actors do not necessarily have anything in common, except the desire to bring a particular problem to the attention of government. As the policy cycle progresses, the number of actors remaining involved in the policy-making process starts to decline.

Those actors who participate in the policy formulation stage of the model are considered to be members of policy communities and policy networks (Howlett and Ramesh 1995). Policy communities are comprised of individual policy actors who share a common focus. This focus, usually represented as a shared knowledge base, provides the members with a reason to remain in contact with each other. The members of policy networks are also linked together by a common knowledge base, however, they also share some type of common material interest. This interest serves as an additional incentive for the members to remain in contact with each other. By the decision-making stage of the model, virtually all non-state actors have been excluded from the policy-making process. Only those government authorities with the power to make decisions participate in this stage of the model.

2.3   Policy Related Ecotourism Initiatives

To generate insight into the types of issues that need to be addressed in an ecotourism policy and to help set the context in which ecotourism policies exist, it is worthwhile summarizing ecotourism policies, strategies and initiatives developed by regions outside of Manitoba. While every attempt was made to acquire any and all copies of these documents, this was not always possible. The information presented below represents a summary of some of the more significant ecotourism policies, strategies and initiatives being undertaking throughout the world; with a focus on their contributions to the policy-making process. Literature not associated with a particular region, yet relevant to the understanding of key policy issues, is also reviewed.

2.3.1   Canadian Efforts

National Efforts

One the first examples of federal interest in ecotourism development is found in a 1992 report produced by the Canadian Environmental Advisory Council for the Minister of the Environment. Entitled *Ecotourism in Canada* (Scace et al. 1992), this report identifies, among other things, constraints to ecotourism development within Canada. These constraints include the:

- lack of consideration for ecotourism opportunities within the resource planning process, resulting in the restriction of possible ecotourism experiences;

- reluctance of the private-sector to invest in the industry because of the unpredictability of land designations;

- absence of baseline data and effects monitoring;

- shortage of funding to carry out necessary research;

- lack of standards for tour operators, both within the field and within communities;

- absence of product guidelines, and the delivery of an inconsistent experience;

- problem of enforcing codes of conduct;

- lack of adequate opportunities for training;

- problems associated with marketing an industry with many small operators and few clearly identified products; and

- lack of local and national leadership within the ecotourism industry.

More recently, the Federal Government, through the recently created Canadian Tourism Commission, has developed a national framework strategy for adventure travel and ecotourism. With input from each of the provinces and territories, the framework proposes specific strategies to address: product development, packaging, resource protection/sustainability, business development and management, marketing and promotion, training/human resources, and industry organization (Canadian Tourism Commission 1998). Manitoba's input into the formulation of this strategy was primarily delivered by industry and government representatives (Goy *pers. comm.* 1997).

Provincial Efforts

British Columbia

The British Columbia Government does not presently have any type of provincial policy, strategy or initiative relating to ecotourism development (Bekker *pers. comm.* 1996). According to Bekker, policy issues relating to ecotourism are presently addressed by a "seat-of-the-pants" management approach. Ecotourism development in British Columbia is viewed as an issue to be addressed within their larger sustainable development policy, currently being developed.

Of a more immediate nature, the British Columbia Government is trying to work with private-sector tourism members to develop a provincial ecotourism growth strategy. Efforts to date have primarily focused on product identification and market analysis, however, more attention is now being placed on incorporating ecotourism considerations into their land-use planning process (Bekker *pers. comm.* 1996).

The most significant ecotourism initiative carried out within the province is a joint study contracted by the Governments of British Columbia and Alberta in 1994, to assess the market demand for ecotourism in those areas (Bekker *pers. comm.* 1996). The study provides information related to the ecotourism market in general, ecotourist characteristics (including motivations and preferences), overall demand, and perceived barriers to visiting the two provinces. Product and market development implications associated with this information are also identified (HLA and ARA 1994).

While valuable, market analysis studies have failed to provide British Columbia's tourism industry with any sort of development guidelines. To address this need, many of the private-sector tourism interests have adopted the Tourism Industry Association of Canada's (TIAC) *Codes of Conduct* (Bekker *pers. comm.* 1996). Alternatively, some groups (e.g. whale watching tour operators) have taken it upon themselves to develop and enforce their own voluntary codes of conduct.

Alberta

Apart from their participation in the HLA and ARA (1994) study, the Alberta Government has not formally developed any sort of province-wide policy, strategy or initiative to develop their ecotourism industry (Wight *pers. comm* 1998).

Saskatchewan

In partnership with provincial and federal government departments, and other regional organizations, a series of ecotourism studies were recently commissioned by the Saskatchewan Watchable Wildlife Association (SWWA); a *State of the Resource Report*; a *Working Strategy*; and a primary research strategy to test the working strategy (Anderson/Fast et al. 1996).

The *State of the Resource Report* primarily serves to inventory ecotourism opportunities present within Saskatchewan. The *Working Strategy* builds upon this information, recommending specific strategic initiatives to develop Saskatchewan's ecotourism industry, including:

- the creation of a Sustainable Tourism Council to oversee product development, marketing, inter-governmental affairs and policy development;

- the development of an ecotourism accreditation program and a sustainable tourism policy;

- the creation of a separate marketing strategy and policy;

- the involvement of local communities in the design and delivery of ecotourism travel packages; and

- the establishment of appropriate guide and interpretation training programs.

According to McCallum *(pers. comm* 1998), the Saskatchewan Government is now attempting to address these recommendations through two basic initiatives. An ecotourism task force, consisting of representatives from the private-sector, the government and Aboriginal groups, has been assembled to examine and work towards implementation of the recommendations. To date, the task force has developed a draft set of policy related recommendations (Appendix 2), which are currently under public review.

The second basic initiative the Saskatchewan Government plans to follow is the development of a site accreditation program. The program will replace traditional forms of licensing for ecotourism businesses in Saskatchewan, and will allow accredited ecotourism businesses to display a special 'eco-logo' on their doors, verifying their commitment to the concept of ecotourism. The Saskatchewan Government plans to aggressively market their province as an ecotourism region, focusing on the promotion of accredited organizations. McCallum *(pers. comm.* 1998*)* believes that the responsibility for this program will be contracted out to either the SWWA, the provincial parks department or the environmental resources department.

Ontario

According to both Athanassakos *(pers. comm.* 1996*)* and Andrea *(pers. comm.* 1996*)*, Ontario does not have a provincial ecotourism policy, nor have they undertaken any initiatives or major studies dealing with ecotourism. The northern region of Ontario has, however, recently developed a new resource-based tourism policy that applies to ecotourism operations (Webber *pers. comm.* 1998*)*. The policy was developed in consultation with numerous stakeholder groups, including: the forestry, mining, and prospecting industries, tourism operations, environmentalists, First Nations representatives, anglers and hunters, and various levels of government. The overall goal of the policy seeks "to promote and encourage the development of the Ontario resource-based tourism industry in both an ecologically and economically sustainable manner" (Ontario Government 1997:). The specific objectives of the policy are to:

- recognize the resource-based tourism industry as an important component of Ontario's tourism sector and its importance to the well-being of Ontario;
- ensure that the natural resource base the resource-based tourism industry depends on is managed in a sustainable manner; and
- implement a fair and open process for the allocation of tourism-related natural resources and for the resolution of potential conflicts.

The policy represents a framework from which specific instruments can be developed to

achieve the overall goal. In guiding policy options and decisions, a set of nine general principles act as fundamental evaluation criteria (Appendix 3). The framework offers individual operators the potential to improve their business opportunities as they relate to land tenure, allocation of resources and the responsibilities they undertake for the use and stewardship of resources. Four different resource use allocation categories are presented within the policy, each with varying degrees of benefits and responsibilities (Appendix 3). In general terms, the policy framework dictates that greater exclusivity in land-use be accompanied by greater financial costs and resource management responsibilities. The manner in which the policy will be implemented and the roles associated with government and private industry stakeholders is also presented in Appendix 3.

Quebec

The Government of Quebec does not have a provincial policy or strategy relating to the development of ecotourism (Cluzeau *pers. comm.* 1996). The Province has been quite active, however, in developing a number of ecotourism related reports; primarily relating to the development of marketing initiatives. In addition, the Province was host to the 7th Annual World Congress on Adventure Travel and Ecotourism in October, 1997.

Newfoundland & Labrador

In 1993, the Government of Newfoundland and Labrador released a Discussion Paper focusing on the development of an adventure tourism strategy for this region (Government of Newfoundland and Labrador 1993). Within the paper, the term 'adventure tourism' is defined to encompass a variety of activities, including those classified as ecotourism. The paper does not propose a specific strategy, but rather identifies those factors which might impact upon the development of a strategy. Incorporating input from provincial and federal government departments, industry associations, and individual tour operators, the paper examines a variety of considerations relating to product development, human resource development, the entrepreneurial environment, environmental management, and marketing. For a more detailed

description of the issues contained within each of these areas, readers are directed to consult Government of Newfoundland and Labrador (1993).

New Brunswick

New Brunswick was one of the first Canadian Provinces to investigate the development of a provincial ecotourism industry (Cunningham *pers. comm.* 1996). Numerous marketing studies were carried out in the early 1990's, many in conjunction with the National Autobahn Society. The results of these studies led the Government of New Brunswick away from an ecotourism focus, towards the development of a more broad-based tourism product. Activities and features commonly associated with ecotourism are still promoted, but receive secondary attention to the main attraction being promoted. Provincial involvement in ecotourism initiatives today primarily relate to specific developments and frequently revolve around the development of strategic plans (Touchie *pers. comm.* 1996)

Nova Scotia

The tourism industry in Nova Scotia is relatively unregulated. All that is required of tour operators is that they acquire a standard business license. Over the last several years, however, the Government of Nova Scotia has become more involved in the development of their tourism industry. The primary focus at this time is the development of a Provincial Nature-Tourism Strategy (McNutt *pers. comm.* 1997).

A discussion paper containing a framework for the development of a Provincial Nature-Tourism Strategy was released for public comment in March, 1995 (Government of Nova Scotia 1995). Within this paper, nature-tourism is described as *travel to a specific area to experience and learn about the natural environment of that area*. To be classified as nature-tourism an activity must not only provide a beneficial experience to the tourist, it must also have some type of educational component.

The paper was developed with input from provincial representatives from the departments of: Economic Renewal (Tourism, Marketing), Environment, Natural Resources,

Municipal Affairs, Education (N.S. Museum), Transportation & Communications, and Sport & Recreation. Public commentary on this discussion paper is being used to develop a Draft Strategy, however, nothing has been released to date. According to McNutt, the first phase of this strategy will focus on infrastructure and marketing concerns.

The discussion paper identifies a number of key issues relating to the development of a nature-tourism strategy. These issues are categorized into three main categories: (1) environmental conservation and management, (2) sustainable development and use, and (3) awareness. A summary of the major issues associated with each category is presented in Appendix 4. To address the variety of concerns associated with these issues, the consultation paper adopts a basic strategic objective:

> "....to develop a Nature Tourism Strategy which encourages the positioning of nature tourism as a key component of the Nova Scotia tourism economy. This is to be done through initiatives which foster sound resource conservation and management practices, sustainable development and use, and increased public awareness".

To achieve this objective, several guiding principles are adopted. These principles revolve around the encouragement of initiatives that:

- are socially and culturally acceptable to the local way-of-life;

- use consultative and co-operative approaches involving concerned stakeholders;

- work towards the dual goals of environmental sustainability and economic development;

- provide high quality and safe experiences; and

- increase the understanding and appreciation of nature by both residents and visitors.

Other government initiatives relating to the development of ecotourism in Nova Scotia include the creation of a small financial assistance program for communities wanting to develop a nature-tourism industry, and the establishment of thirty-one new park sites (McNutt *pers. comm.* 1997).

Nova Scotia's private-sector has also undertaken its own initiatives to develop nature-tourism in the Province, including the establishment of a new adventure tourism organization

(Nova Scotia Adventure Tourism Association) and a separate Sustainable Tourism Initiative (Smith *pers. comm.* 1997).

Yukon

There are no specific policies or strategies guiding the development of ecotourism in the Yukon Territory (Spicer *pers. comm.* 1996). At present, the Yukon's ecotourism industry is solely governed by their general business Licensing Act, which requires only that operators obtain a standard business licence. The Yukon Government is, however, working towards the development of comprehensive adventure/wilderness tourism legislation that will encompass activities traditionally classified as ecotourism. The development of licensing legislation for adventure/wilderness tourism operators (including non-consumptive users) is viewed as the first step within the development process. The creation of the new licensing legislation is currently underway, however, nothing is yet available for public review.

Northwest Territories

The Government of the Northwest Territories does not have a territorial wide policy or strategy relating to the development of ecotourism. The most recent ecotourism initiative undertaken by the government involved partnering with the World Wildlife Fund to develop a code of conduct for communities and travellers in the Nunavut region (Smyth *pers. comm.* 1998).

2.3.3   International Efforts

United States

The United States has not developed any sort of national policy or initiative relating to ecotourism development (Johnston *pers. comm.* 1996, Mallet *pers. comm.* 1997). Hawaii and Alaska are the only two states where ecotourism policy initiatives were identified.

Hawaii

Following Hawaii's first State Conference on Ecotourism in 1994, the Department of

Business, Economic Development & Tourism sponsored a study to examine the ecotourism industry in Hawaii (Centre for Tourism Policy Studies 1994). The study primarily serves to examine some of the more marketing related aspects of ecotourism, however, public policy issues relating to the development of an ecotourism industry are also identified. Identified issues include the:

- usage of both private and public sector lands;
- preservation of lands;
- presence of excessive and uncoordinated regulations (with permits and government departments);
- redistribution of tourists to less crowded areas;
- need for government to take a more active role in product development;
- development of funding sources;
- need for research on carrying capacities (physical and sociocultural) for different regions; and
- development of education and interpretation programs.

Alaska

Outside of a concerted effort to develop a strong marketing campaign, the State of Alaska does not presently have a policy relating to ecotourism development (Carlson *pers. comm.* 1996). The success of their marketing campaigns have, however, accelerated the need for an overall ecotourism development policy. The private sector has attempted to fill this need by developing their own set of ecotourism guidelines (Maling *pers. comm.* 1996). Developed by the Alaska Wilderness Recreation and Tourism Association (1995), these guidelines are presented in Appendix 5.

Australia

In 1994, the Federal Government of Australia released it's *National Ecotourism Strategy* (NES) (Allcock et al. 1994). The NES was developed around the vision of developing

an ecotourism industry that is ecologically and culturally sustainable, internationally competitive, and domestically viable. To realize this vision, three separate goals are developed:

- to identify major issues affecting the planning, development and management of ecotourism in Australia;

- to develop a national framework to help guide the actions of operators, natural resource managers, planners, developers and all levels of government; and

- to formulate policies and programs to assist those who want to work towards achieving the vision statement.

The NES was developed through consultation with a broad range of organizations and individuals, including: government bodies, natural resource managers, tour operators, tourism marketers, planners, conservation and community groups, developers, and aboriginal groups. Key ecotourism issues identified by these groups include the need for:

- minimal impact and ecologically sustainable approaches in planning, development and management;

- simplified and integrated processes in the planning and regulation of ecotourism, across government boundaries and between agency jurisdictions;

- consideration of the factors affecting the management of natural resources, including those constraints that could be imposed by additional use;

- development of appropriate infrastructure;

- monitoring of impacts to assist in effective management and decision-making;

- consideration of the challenges associated with marketing ecotourism products;

- appropriate industry standards and a possible accreditation system;

- educational initiatives, for both tourist and operators;

- involvement of aboriginal groups, resource managers, and tourism operators;

- consideration of factors affecting the viability of ecotourism businesses; and

- integration of equity considerations arising from competition for a limited natural resource base.

In addition to this national effort, regional strategic plans have been developed for

Queensland, New South Wales, Victoria, Tasmania, Southern Australia, Western Australia, the Northern Territory, and the Capital Territory (Preece et al. 1996).

Bahamas

The Bahamas has recently completed the formulation of a sustainable tourism policy for the development of its outlying islands. While the completed policy is not yet available for public review, an examination of its executive summary reveals the basic policy components (ecoplan:net 1995). The basic components revolve around the following topics:

- Sustainable Development *(integrated planning, maximizing economic contributions, local involvement in development and sharing of benefits, consultation with all local stakeholders, intergenerational equity)*;

- Marketing;

- Hotel/Resort Green Management *(green management policy, purchasing procedures, energy and water conservation, use of pesticides and herbicides)*;

- Heritage Restoration *(architecture, site planning and protection of heritage landscapes)*;

- Sites/Facility Development *(site planning, site design, building design)*;

- Environmental Impact Assessments;

- Research and Monitoring of Environmental Impacts;

- Natural and Cultural Resource Protection and Enhancement;

- Protection of Marine Resources;

- Marine Debris Reduction;

- Enforcement of Regulations and Laws;

- Waste Management *(waste reduction, solid waste management)*;

- Water Conservation;

- Training and Education *(staff training, public environmental education, tourist education)*;

- National Initiatives *(sustainable tourism planning, Bahamas conservation strategy,*

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strengthening sustainable resource management capacities); and

•   Establishment of a Sustainable Tourism Development Unit.

    The sustainable tourism policy, in its entirety, is currently under cabinet review by the Bahamas Government. Ten of the 34 proposed policies are expected to be endorsed and released in the near future (Bowe *pers. comm.* 1997).

Other International Regions

    In addition to the regions discussed above, Costa Rica, Belize, Brazil, Ecuador, and South Africa have all developed or are in the process of developing comprehensive ecotourism policies and/or strategies (Eplar-Wood *pers. comm.* 1997, Thlale *pers. comm.* 1997). Despite several attempts, efforts to obtain copies of these ecotourism initiatives were unsuccessful.

2.3.4   Ecotourism Guidelines

    Although few destinations have developed comprehensive ecotourism policies, a number of attempts have been made to develop a more general set of ecotourism 'guidelines', 'codes of conduct', and/or 'codes of ethics' (herein referred to as 'guidelines'). In general, ecotourism guidelines provide direction on how to deal with commonly occurring circumstances (Blangy and Wood 1993). Ecotourism guidelines exist in a number of forms, with some emphasizing the strategic aspects of development and others placing more emphasis on operational concerns (Hawkes and Williams 1993). Examples of general/strategic ecotourism guidelines and more specific/operational ecotourism guidelines are provided in Table 6 and Appendix 6, respectively. For further examples of ecotourism guidelines readers are encouraged to consult Blangy and Wood (1993), Hawkes and Williams (1993), Fisheries Joint Management Committee (1994), Tourism Industry Association of Canada (n.d.), and the South Carolina Nature-Based Tourism Association (n.d.).

    In a review of 70 different sets of ecotourism and minimum impact guidelines, Blangy and Wood (1993) identify six different ecotourism stakeholder groups who have developed their own guidelines: religious and ecumenical groups, the tourism industry, environmental

Table 6
Example of General/Strategic Guidelines
(Sierra Club's Ecotourism Policy)

1)Plans must respect the right and needs of indigenous human populations.

2) Plans must respect the carrying capacity and bio-diversity of the environment.

3) Development of ecotourism should be integrated with broader land-use planning to avoid destruction of ecosystems.

4) Specific fragile areas, such as ecosystems containing rare and unique species, should be set aside for complete protection.

5) Infrastructure and other development within natural preserves and surrounding areas should be limited to basic maintenance needs and support services.

6) Respect must be given to wildlife migration routes and to the maintenance and restoration of interconnected ecosystem structure and function.

7) Visitor plans should be designed and implemented to include use of equitable rationing or quota systems for access to those sensitive areas were visitor access would not be a conflict.

8) Proper waste management, energy conservation, and environmental restoration should be a part of all planning.

9) All waste should be stored on-board ships and other watercraft for proper disposal in ports. Ships should have the capability to store all wastes on-board for the duration of the trip.

10) Helicopters are inappropriate vehicles for many sensitive areas such as endangered species' recovery areas, certain national parks, etc., and should be eliminated or strictly controlled as to height limits.

11) Encourage and support local, national, and international conservation efforts through appropriate actions and donations.

Source: Sierra Club (1996)

non-government organizations; governments (e.g. national and local land management agencies); outdoor equipment stores; and consumer associations. In general, these ecotourism guidelines are targeted at three primary groups: visitors, travellers, and ecotourists in general; commercial and non-profit tours, cruise operators, and concessionaires; and specialists such as researchers, educators, hunters, snorkelers, wildlife watchers, and hikers (Blangy and Nielson 1993). Guidelines have also been developed specifically for government agencies (Tourism Industry Association of Canada n.d.).

The specific intent and focus of ecotourism guidelines will often vary with the mandate

Table 7
Key Issues Addressed by Ecotourism Guidelines

Ecological Guidelines	
• Garbage disposal • Human-waste treatment • Firewood collection and fuel self-sufficiency • Campfire placement • Campsite placement • Trail, driving, or boating behavior • Endangered species protection • Suitable distances for wildlife • Viewing and photography	• Feeding or touching animals • Pet care • Protection of clean water supply • Noise levels of campers, vehicles, radios • Visual impact of visitors on other visitors • Group size • Collecting natural souvenirs • Purchasing natural souvenirs • International trade laws

Social Guidelines	
• Local customs and traditions • Religious beliefs • Permission for photographs and other social favours • Dress • Language • Invasion of privacy • Response to begging • Keeping promises	• Use and abuse of technological gadgetry • Bartering and bargaining • Indigenous rights • Local officials • Off-limits areas • Alcoholic beverages • Smoking • Tipping

Economic Guidelines	
• Purchasing local products • Paying user and entry fees • Making donations to local NGOs	• Using locally-owned restaurants and lodging • Appropriate tipping procedures

Source: adapted from Blangy and Wood (1993)

of the associated stakeholder group, however, they generally tend to relate to three different areas: ecological, social, and economic (Blangy and Wood 1993). A summary of the specific issues associated with these areas is presented in Table 7. An examination of the compliance attitudes of ecotour operators towards industry guidelines points out that compliance with ecotourism principles is influenced by a variety of both intrinsic and extrinsic factors (Sirakaya 1997). Influencing factors include the: type of social and economic sanctions facing the operators; gender of the respondents; perceived moral obligations; and the level of revenue obtained from ecotourism activities. Sirakaya (1997) suggests several strategies which may improve the level of compliance with ecotourism guidelines, including: educating operators

Formulation Of An Ecotourism Policy Framework For Manitoba

about their impacts and the benefits of complying with guidelines; describing to operators the logic behind each of the items included within the guidelines; making the guidelines available to all operators within the community; making non-compliance costly to the operator (e.g. publishing the names of non-compliant operators in a local newsletter); and providing incentives to operators who exhibit a high level of compliance. Overall, key strategies for improving operator compliance with ecotourism guidelines seem to lie in educating the operators and placing a call to their conscience (Sirakaya 1997).

In addition to the development of guidelines, some environmental non-government organizations have further embraced the concept of ecotourism by developing their own tourism programs and products. For example, World Wildlife Fund (WWF) Canada, assisted by the Canadian International Development Agency and the Costa Rican Government, has recently opened up three new ecotourism lodges in north-central Costa Rica (Winnipeg Free Press 1996).

In a similar fashion, the Nature Conservancy has developed an ecotourism lodge in Peru. Funds from these types of development efforts are incorporated back into environmental conservation efforts; and in the case of the Nature Conservancy, a portion of the funds are delivered directly back to the local population (Kaplan *pers. comm.* 1996).

2.4   Summary

Several key issues relating to ecotourism development emerge from the policies, strategies, initiatives and guidelines reviewed in the preceding sections. These issues represent the basis for the formulation of an ecotourism policy and include the need:

- for comprehensive stakeholder involvement;
- to manage and improve the net impact of ecotourism developments;
- to develop appropriate physical infrastructure;
- to address land-use conflicts;
- for the creation of industry standards;
- to promote educational and training initiatives; and
- for financial assistance.

Similar issues are also identified by Mandziuk (1994) as common planning and management practices emergent within the literature. According to Mandziuk (1994), trends evident throughout these practices include the: involvement of key stakeholders; development of interpretive programs; establishment of development guidelines for protected areas and neighboring communities; consideration of carrying capacities and zoning requirements; promotion of environmentally and culturally sensitive designs for ecotourism facilities; application of marketing, human resources, and finance disciplines; and the creation of monitoring and evaluation programs.

Incorporating the work of Mandziuk (1994) and related literature, a brief discussion of the key issues identified from the preceding sections is presented below. While each issue is discussed separately, it must be emphasized that a certain degree of interconnectedness runs between them. The discussion does not attempt to provide a comprehensive understanding of this interconnectedness, but rather, seeks to establish a level of understanding conducive to the formulation of a comprehensive ecotourism policy.

2.4.1   Stakeholder Involvement

In the past, decisions to develop tourism activities have largely been left to the private sector. Development decisions have often been made in a vacuum, resulting in non-viable operations and the inappropriate use of specific areas (Boyd et al. 1994). A more inclusive decision-making process that incorporates the concerns of all stakeholder groups is needed to ensure that ecotourism is developed in a sustainable manner (Ceballos-Lascurain 1996, Knowles-Lankford and Lankford 1995, Boyd et al. 1994, Butler 1994, Boo 1990, Ziffer 1989). According to Mandziuk (1994), the most successful ecotourism strategies seek input from a variety of stakeholder groups, including: government representatives, landowners, area residents, tourists, environmental organizations, tourism operators, business people, developers, parks and protected area managers, mass transport companies, economic development agencies, and financial institutions.

Consulting stakeholder groups improves the overall decision-making process by

helping to identify potential impacts and alternatives, and by establishing a sense of legitimacy for final decisions. Incorporating stakeholder input into decision-making processes also helps to build an overall sense of trust, confidence and community support for ecotourism development efforts (Mandziuk 1994). Despite the benefits of incorporating stakeholder input into decision-making processes, effective consultation efforts are rarely undertaken. Stakeholder consultation is frequently viewed by developers and decision-makers alike as an unnecessary and/or vexatious task, wasteful of valuable time and financial resources.

To maximize the benefits associated stakeholder input, consultation should be sought throughout the development process. It is also important that consultation efforts are carried out in a genuine and sincere manner. Attempting to gather 'input' in a superficial manner, for purposes of political correctness and/or regulatory demands, may only serve to aggravate local stakeholders; decreasing the overall acceptance of a development effort (Arnstein 1969).

To further improve the overall sustainability of an ecotourism venture, stakeholder involvement in the development process must move beyond mere consultation efforts to include the sharing of financial benefits. Ensuring that communities derive financial benefits from ecotourism activities helps to create a sense of community ownership, and acts as an incentive for communities to manage their ecotourism resources in a sustainable manner (Ceballos-Lascurain 1996, Boo 1990).

2.4.2   Improving Net Impacts

As highlighted in Section 2.1.4, the potential impacts associated with ecotourism development are wide ranging. Understanding the significance of these impacts is a complicated process that requires: an analysis of the backward and forward linkages between tourism and other sectors; an understanding of the spatial location of tourism activity; and the identification of stakeholders experiencing the impacts (Ceballos-Lascurain 1996). To ensure that ecotourism activities are carried out in a sustainable manner, efforts must be taken to improve the overall net impact of development efforts. Improving the net impact requires that developers, operators, and consumers make every attempt to maximize the positive and minimize the negative impacts

associated with their activities.

Maximizing the benefits associated with ecotourism requires that its associated activities deposit as many benefits as possible within the host community (Ceballos-Lascurain 1996, Mandziuk 1994, Boo 1990). To accomplish this task, ecotourism efforts should employ as many local residents as possible. In those situations where the local population does not have the skills to capitalize on employment opportunities, they must be provided with an opportunity to improve their skills. In all cases, local people should be considered first when making hiring decisions. In a similar fashion, local businesses should be given first priority when purchasing items relating to the development and operation of an ecotourism business. Involving local people in both development and operational activities not only serves to multiply positive financial impacts and minimize economic leakages, but helps to improve the overall political acceptability of a development.

Efforts to counter the negative impacts associated with ecotourism development may take a variety of forms. One of the more commonly accepted methods of minimizing negative tourism impacts involves the development of specific zoning requirements (Mandziuk 1994). The requirements themselves may take a number of forms but traditionally involve setting aside specific areas for tourism activities, and/or limiting the types of activities and developments that may take place in a certain area.

Development limitations in general are frequently based around the concept of carrying capacity. The concept of carrying capacity is based on the belief that the surrounding environment can only handle so much activity before a decline in ecological value, cultural value or visitor experience is reached (Coccosis and Parpairis 1992). Although it has its drawbacks as a definitive resource management tool, the concept of carrying capacity is frequently used to guide the development of popular visitor management frameworks; i.e. the Recreation Opportunity Spectrum (ROS) used by the US National Forest Service; the Limits of Acceptable Change (LAC) model; and the Visitor Activity Management Process (VAMP) used by the Canadian Parks Service (Mandziuk 1994).

To truly improve net impacts, consideration must also be paid to the distribution of the

benefits and costs associated with development efforts. There are often great inequities in the way that tourism impacts are distributed throughout host communities. Local residents are often forced to bear the burden of costs while operators, frequently from outside the host communities, enjoy the majority of benefits (Williams 1992). Distributional inequities are largely due to the fact that tourism developers have focused their efforts on economic growth, relying upon market forces to deal with distributional issues. However, traditional market economies are not designed to deal with distributional issues, and so there is no guarantee that economic growth will solve distribution problems (Ceballos-Lascurain 1996, Randall 1981). To ensure the fair distribution of ecotourism impacts, determined efforts must be taken to involve local people in all aspects of development decisions.

2.4.3   Land-Use Conflicts

Shortcomings within the tourism industry frequently arise because of conflicts among special interest groups, difficulties with planning and local control, and the tendency of capital expansion to create development and dependency (Burr 1995). At the heart of these issues lies a debate/conflict over the most appropriate usage of lands. As it requires pristine wilderness for its very product offering, the ecotourism industry is especially susceptible to a variety of land-use conflicts.

Land-use conflicts associated with ecotourism development may arise from any number of scenarios. In areas that sustain more established and extractive resource-based industries, there is a likelihood that conflict may arise over access to a specific resource base. In many areas, however, the issue is not ecotourism versus no development, but rather ecotourism as an alternative or complementary form of development. Ecotourism may not always be able to completely substitute for more extractive resource industries, including other forms of tourism, but it may be able to co-exist with these industries, promoting more environmentally sensitive development practices in the process (Williams 1992).

A potential for conflict is also interwoven within the resource protection versus development debate. The development of tourism activities in and around protected natural areas

is not viewed by all stakeholders as an acceptable option. Park managers often criticize the tourism industry for promoting population growth in and around protected natural areas, arguing that this growth is incompatible with park values. Alternatively, local populations may develop hostility towards tourism activities if they feel that foreigners are trying to invade their natural areas (Ceballos-Lascurain 1996).

Another related issue fuelling the potential for conflict relates to the area of jurisdiction. While some prime ecotourism areas (e.g. national parks) are generally administered by a single management organization and set of policies, the surrounding land is often under the control of a variety of stakeholders (Ceballos-Lascurain 1996). Regardless of the issue at hand, maintaining open communication channels between all stakeholder groups appears to be the best available option for avoiding potential land-use conflicts.

2.4.4   Appropriate Infrastructure

The development of any sort of tourism requires destinations to adopt infrastructure that suits the needs and expectations of the target market (Cater 1993). With respect to the ecotourism market, this means adopting infrastructure that is sensitive to the surrounding ecological, cultural, economic and aesthetic environments (Andersen 1993).

Ideally, infrastructure should be developed to reinforce and enhance an ecotourist's enjoyment and understanding of the natural and/or cultural setting of an area (Mandziuk 1994, Andersen 1993). General infrastructure needs associated with the development of an ecotourism industry may include sleeping quarters, interpretive facilities, nature trails, access routes, viewing platforms, etc. (Ceballos-Lascurain 1996, Andersen 1993). One of the more fascinating characteristics associated with ecotourism infrastructure is that there does not exist one perfect formula for design. By its very nature, ecotourism infrastructure is not conducive to mass production techniques. Ecotourism infrastructure ideally grows "from the special spirit of the place" (Andersen 1993).

To address the need for appropriate infrastructure development, numerous sets of design criteria have been developed and incorporated into planning practices over the years

(Mandziuk 1994). A sample set of design criteria and/or guidelines for the development of ecotourism infrastructure might include considerations for (adapted from White 1994):

- minimal site disturbance, including provisions for locating structures in only second growth vegetation areas (leaving all primal forest areas undisturbed);

- emphasizing the use of local resources (e.g. materials and craftsmanship);

- adopting a holistic approach to infrastructure development, whereby all aspects of infrastructure are seen as interdependent;

- using renewable energy resources (e.g. hydro, wind and solar power);

- viewing sewage as a recyclable resource rather than a disposal problem;

- using self-contained DIET (Design Integrated Environmental Technology) buildings to minimize site disturbance for mechanical and electrical system lines throughout the site;

- using recyclable and recycled products and materials; and

- embracing simplicity in design, using quality materials, and building low-maintenance systems.

2.4.5   Industry Standards

As discussed in Section 2, the term 'ecotourism' has evolved over the years to encompass a variety of meanings. With ecotourism businesses as well, a great deal of variation is evident in the areas of service delivery, marketing approaches and general operational practices (Allcock et al. 1994). In an attempt to raise the consistency of ecotourism experiences, many destinations have chosen to adopt a set of ecotourism standards. A comprehensive standards program not only helps to promote the delivery of high quality and sustainable ecotourism experiences, but provides consumers and authorities with a basis for discriminating between legitimate and unscrupulous operators (Allcock et al. 1994).

To complement and promote adherence with ecotourism standards, several independent accreditation programs have emerged within recent years. One of the most well-known accreditation programs is operated by Green Flag International (GFI). GFI is a non-profit company that works in partnership with the tourism industry to make improvements to the

environment worldwide. GFI bases its accreditation decisions upon an environmental audit of tour operations. The auditing process is based around several sustainable tourism criteria, including the (Wight 1993):

- degree of consideration given to landscape, wildlife and cultural heritage;
- presence of efficiency in operations;
- presence of pro-active waste disposal and recycling initiatives;
- degree of interaction with local communities, in terms of purchased goods and services; and
- presence of environmentally sensitive building designs.

Operators who satisfy accreditation criteria are provided with the opportunity to use an internationally recognized ecotourism logo. Similar accreditation programs are also offered through the World Travel and Tourism Council (Green Globe) and the Ecotourism Association of Australia.

Operators who abide by set standards and participate in accreditation programs gain increased credibility and thus a competitive advantage within the marketplace (Sirakaya 1997, Allcock et al. 1994, Wight 1993). To ensure their sustainability and effectiveness, it is imperative that standards and accreditation programs be developed in conjunction with local ecotourism operators and be financially self-sufficient over the long-term (Goy *pers. comm.* 1996).

2.4.6 Financing

Although designed to be less intrusive than other forms of tourism activities, an ecotourism business is not necessarily less costly to develop. As with other forms of tourism, financing is needed to cover a variety of developmental and operational concerns, including: resource inventories; planning and land acquisition activities; infrastructure construction and maintenance; interpretation programming; staff salaries; and training programmes (Mandziuk 1994). In some instances, because of the need to adopt low-impact practices, the cost of developing an ecotourism businesses may exceed that of more traditional nature-based tourism

operations (e.g. hunting lodges) (Patterson 1997).

The difficulty of finding financing opportunities for tourism development activities in general is well respected by those within the industry. The service-oriented nature of the tourism industry has little appeal to a financial system that bases its lending decisions around the valuation of 'hard assets'. The challenges are especially great for smaller operations, who are frequently ignored by financial institutions not wanting to be bothered with small value loans (Whitehouse Consultants 1995). The relatively new emergence of the ecotourism industry only serves to compound these financing difficulties. In fact, a lack of funding is identified as the single greatest limitation to the implementation of ecotourism strategies (Mandziuk 1994).

User fees are traditionally the most common and desirable form of revenue generation for an ecotourism operation. However, Ziffer (1989) points out that not all ecologically important areas may be able to generate sufficient tourist revenues; outside sources of revenue may be needed to maintain a tourism operation. Mandziuk (1994) identifies several other potential sources of revenue, including: corporate or private donations; grants or concessionary loans from government agencies, conservation organizations, and/or foundations; bequests; lotteries; and the sale of ancillary services or products.

While touted by academics and consultants alike as an ideal employment opportunity, the reality is that most ecotourism operations generate meagre profit margins (Patterson 1997). The challenges of making a living off of ecotourism are not to be approached lightly; Patterson (*pers. comm.* 1997) advises prospective ecotourism operators "not to quit their day job" before their businesses are fully established.

2.4.7 Education & Training

Common throughout all of the key issues discussed above is the need for educational initiatives within the ecotourism development process. Educational initiatives are needed to provide all stakeholders with a general understanding of the complexities associated with ecotourism development. Educational initiatives must create a level of knowledge and awareness that allows: local residents to make informed decisions regarding the level and type of tourism

that is desired (including ownership, scale, location, and timing considerations); tourists to fully understand the impacts associated with their activities; and tour operators to develop and maintain their operations in a sustainable manner (Cater 1993). In particular, educational initiatives are needed to ensure that all stakeholders have a clear understanding of the roles they and others play within the ecotourism development process (Cater 1993).

Educational initiatives may take a variety of forms, including the development of stakeholder 'codes of conduct', community meetings, newsletters, and training programs. The need for effective training programs, in particular, is highlighted throughout the literature (Mandziuk 1994). Effective ecotourism training programs are critical for ensuring that: an adequate pool of qualified guides are available for hire; communities have the skill-set to take advantage of ecotourism opportunities; protected area managers are able to deal with the potential impacts of ecotourism activities; business operators have the necessary skills to run an ecotourism business; and the needs and expectations of the target market are met (Ceballos-Lascurain 1996, Mandziuk 1994, Boo 1990, Ziffer 1989).

Ideally, specialized training programs should be developed for protected area managers and support staff, park rangers, government authorities, politicians, tour operators, tour guides, travel agents, hotel and restaurant owners and managers, investors and entrepreneurs, conservationists, and local communities. Specialized training programs are needed to ensure the effective participation by all stakeholders in the ecotourism development process (Ceballos-Lascurain 1996). In all cases, Ceballos-Lascurain (1996) advises that an interdisciplinary and multi-sectoral approach be adopted when developing training programs. Tourism education efforts in general must incorporate information from the fields of psychology, anthropology, sociology, economics, business administration, geography, ecology, law, and of course, education (World Tourism Organization 1995).

2.4.8   Towards The Formulation Of An Ecotourism Policy

The complexity and magnitude of potential impacts associated with ecotourism activities necessitates that a strategic approach to development be adopted. The literature,

however, reveals few formal attempts by governments to develop comprehensive ecotourism policies. There appears to be more of a public penchant for creating marketing studies and promotional campaigns than there is for creating overall strategic direction.

The lack of existing ecotourism policies is due, in part, to the complexity of issues associated with the industry. An ecotourism policy must remain broad enough to address a variety of key issues relating to the areas of: public involvement; ecological, social, and economic impacts; land-uses; infrastructure; financing; and education and training. An effective policy formulation process must not only seek to identify these issues, but to try and understand the interconnectedness between them.

3.0   RESEARCH STRATEGY

The literature describes the public policy-making process to be a fragmented and often nebulas undertaking. The process that ends up being adopted by policy-makers is a product of their individual preferences, the surrounding political climate, and the importance of the topic under review (Howlett and Ramesh 1995, Bryan and Taylor 1990, Majchrzak 1984). A set process for formulating tourism policy simply does not exist (Echtner and Kirker 1995).

The policy formulation process adopted in this study incorporates the logic of Howlett and Ramesh's (1995) general policy model, but re-works the stages to more closely correspond with the desired end-product; a policy similar in organizational structure to Manitoba's sustainable development policies. The basic organizational structure of Manitoba's sustainable development policies centres around four main features: (1) key issues, (2) policy objectives, (3) policy components, and (4) policy applications/instruments. Discussed below, the stages of this study's policy formulation process are named after these main features (Figure 3).

Formulation Process For Manitoba's Ecotourism Policy Framework

Stakeholder Input ⇒ Establishment of Key Policy Issues ⇐ *Stakeholder Input*
⇓
Formulation of Policy Objectives
⇓
Formulation of Policy Components
⇓
Development of Policy Application Recommendations
⇓
Stakeholder Input ⇒ 1st Draft Policy Framework ⇐ *Stakeholder Input*
⇓
Stakeholder Input ⇒ 2nd Draft Policy Framework ⇐ *Stakeholder Input*
⇓
Proposed Policy Framework
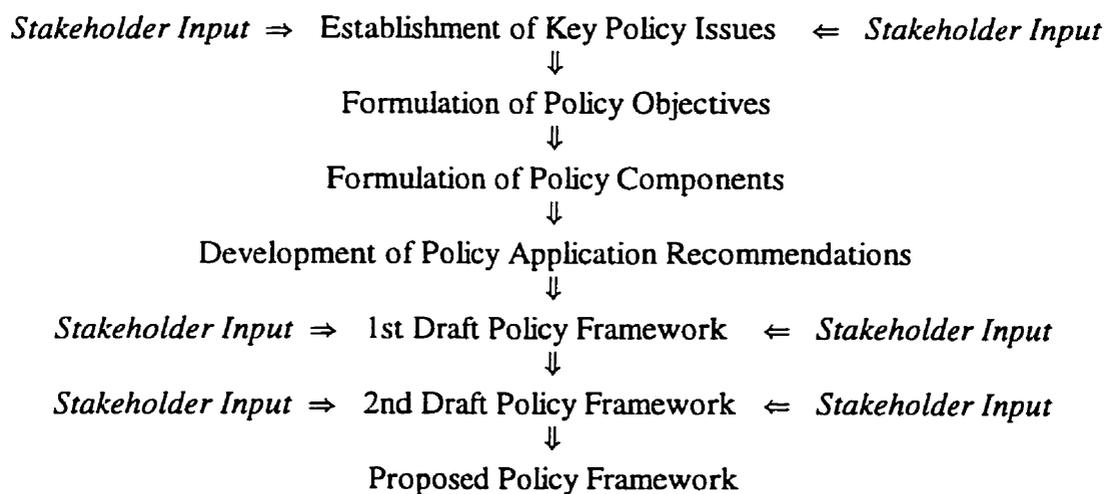
Figure 3

3.1 Establishment of Key Policy Issues

It is important that an effective public policy identify the perspectives and concerns of those individuals and groups who may be affected by its implementation. The literature commonly refers to these individuals and groups as a *policy subsystem*; more specifically, they are referred to as *policy communities* and *policy networks* (Howlett and Ramesh 1995). For purposes of simplicity, this study commonly refers to these individuals and groups as *stakeholders*. The perspectives and concerns of these stakeholders represent the key issues that a policy is based around. To identify key issues facing the development of Manitoba's ecotourism industry, a multi-stakeholder interview process was employed.

3.1.1 Identification of Stakeholders

Following the example set in Australia during the formulation of its *National Ecotourism Strategy* (Allcock et al. 1994), input was sought from a variety of stakeholder groups, including:

- government bodies (Provincial and Federal) (including resource managers);
- private industry (tour operators, tour marketers, and tourism associations);
- environmental non-government organizations (ENGO's); and
- Aboriginal groups (First Nations).

Specific individuals from each group were identified through discussions with key informants associated with the groups. After being briefed about the purpose and objectives of this study, informants were asked to make recommendations regarding potential respondents for the study. Throughout the interview process, the respondents themselves also made recommendations regarding additional potential respondents.

Every attempt was made to try and interview a fair and representative number of individuals from each stakeholder group, however, this was not always possible. The number of individuals interviewed from each stakeholder group was subject to a number of influencing factors, including:

- the relative degree of complexity associated with each stakeholder group (for example,

the 'private industry' stakeholder group was considered to be more complicated than the others, given the presence of both tour operators and tour marketers, and the variety of tours associated with each);

- time considerations associated with this study;
- the willingness of individuals to participate in an interview; and
- the ability of individuals to participate in an interview.

Generally, these influencing factors applied evenly over the range of stakeholder groups. In the case of the 'industry operators' group, care was taken to ensure that individuals were chosen from across the province and from a variety of ecotourism activity sectors; including those relating to polar bears, whale watching, birding, northern lights viewing, canoeing, naturalist activities, photography, trail riding, cultural tours, and kayaking. Also of special note, was the difficulty experienced in obtaining responses from the Aboriginal stakeholder group.

In instances where recommended individuals belonged to more than one stakeholder group, a decision was made to assign the individual to a single group. Assignment decisions were based on recommendations by the nominating individual, the availability of other potential respondents for a particular stakeholder group, and the preferences of the potential respondent. A total of 22 individuals (respondents) were interviewed; a listing of these respondents and their associated stakeholder groups, is provided in Table 8.

It is important to emphasize that while respondents were classifed as members of specific stakeholder groups, their participation in the interview process did not necessarily represent the 'official' position and/or opinion of those groups. Stakeholder opinions gathered and discussed within this study represent a compilation of individual perceptions and do not necessarily represent the 'official' opinion of Manitoba's ecotourism stakeholder groups.

3.1.2 The Interview Process

After a list of potential respondents was identified, each was contacted by telephone to discuss their participation in the interview process. In contacting potential respondents, a standard greeting was used to introduce the purpose of the call, the overall intent of the research,

Table 8
Interview Respondents

	Respondent Name (Specialization)	Stakeholder Group
1.	Grant Baker (Resource Policy)	Government (Provincial) (Natural Resources)
2.	Glen Suggett (Wildlife)	Government (Provincial) (Natural Resources)
3.	Barry Bentham (Parks)	Government (Provincial) (Natural Resources)
4.	Jim Crone (Parks)	Government (Provincial) (Natural Resources)
5.	Gene Tino (Licencing)	Government (Provincial) (Natural Resources)
6.	Jan Collins (Tourism Development)	Government (Provincial) (Tourism)
7.	Susan Nicoll (Farm Tourism)	Government (Provincial) (Rural Devpmt.)
8.	David McVetty (Business Analyst)	Government (Federal) (Canadian Heritage)
9.	David Hatch (Operator & Marketer)	Industry (Greenspaces Trekking)
10.	Don Finkbeiner (Marketer)	Industry (McDonald Worldwide Travel)
11.	Daniel Weedon (Operator)	Industry (Riding Mountain Nature Tours)
12.	Gerry Turenne (Operator)	Industry (Aikens Lake Lodge)
13.	Max Johnson (Marketer)	Industry (Great Canadian Travel Company)
14.	Charlie Taylor (Operator & MLOA)	Industry (Kaskattama Safari Adventures & MB Lodges & Outfitters Assoc.)
15.	Gail Hall (Association)	Industry (MB Tourism Education Council)
16.	Ernest & Donna Fraser (Assoc.)	Industry (MB Country Vacation Assoc.)
17.	Stanley Bear (Business Advisor)	Aboriginal (Assembly of Manitoba Chiefs)
18.	Elmer J. Fontaine (Econ. Dvlpmt.)	Aboriginal (Assembly of Manitoba Chiefs)
19.	Ian Cramer (Economic Dvlpmt.)	Aboriginal (Southeast Tribal Council)
20.	Hendrick Hersst	ENGO (Spirit of Nopiming & Sierra Club)
21.	Harvey Williams	ENGO (TREE & CPAWS)
22.	Mike Brown	ENGO (MB Naturalists Society)

the requirements of the research, and to confirm their participation in the interview process (Appendix 7). Potential respondents were also notified that the research was being carried out as part of a Master's thesis, funded through Travel Manitoba.

Individuals who agreed to participate in the interview process were given the option of participating in either a personal or a telephone interview. Where feasible, every effort was taken to try and deliver personal interviews. Telephone interviews were used in those situations where personal interviews were not feasible.

Interview Briefing

Preceding their respective interviews, each respondent was briefed as to the purpose and structure of the interview (Appendix 7). Delivered in a standard format, this briefing also involved introducing and defining for respondents, two key terms used throughout the interview process; i.e. 'ecotourism' and 'policy'. Definitions were provided to help ensure the respondents interpreted the words, and the interview questions themselves, in a similar fashion (Silverman 1993, Foddy 1996).

For the first two interviews, definitions were provided to respondents at the beginning of their interviews; afterwards, a decision was made to provide the definitions to respondents at least one full day prior to their interview. The decision to distribute the definitions at an earlier point in the interview process was made to ensure each respondent had ample opportunity to read and interpret the definitions in an unpressured and comfortable environment. To further improve the comfort level of respondents, they were reminded of their opportunity to ask questions at any point in the interview, to have their answers remain anonymous, and to cancel the interview at anytime.

Interview Questions

After the briefing period, each respondent was asked a series of questions. The formulation of questions was influenced by previous research carried out by Weaver et al. (1995). As discussed in Section 4.2, Weaver et al. identify a significant set of issues associated

with the development of ecotourism in Manitoba. To confirm, clarify, and build upon these issues, interview questions similar in content and wording to those used by Weaver et al. were adopted in this study. Following the general line of questioning used by Weaver et al. (1995), respondents were asked to identify their own set of barriers/opportunities that hampered/assisted with the development of Manitoba's ecotourism industry. Detailed in Appendix 7, respondents were also asked to discuss their perspectives, concerns, recommendations and priorities regarding these issues.

Initially, the research strategy for this study involved providing respondents from the industry stakeholder group with a general summary of the issues identified by Weaver et al. (1995) (Appendix 8), and asking for their perspectives, concerns, recommendations and priorities regarding these issues. Since they were not included in the original research carried out by Weaver et al. (1995), respondents from government, Aboriginal and ENGO stakeholder groups were not scheduled to receive a list of these issues. A scoping exercise conducted under this initial strategy revealed a great deal of confusion and frustration for both the respondent and the interviewer. After the scoping exercise, a decision was made to use the same set of questions across all stakeholder groups. The respondent involved with the scoping exercise was re-interviewed, using the same set of questions delivered to all other respondents.

Question Delivery

In all cases, questions were delivered to respondents in an open format. An open question approach was employed to allow respondents the chance to speak their minds without being influenced by interviewer suggestions (Foddy 1996). A general response framework was, however, provided at the beginning of the interview session. The response framework simply asked that respondents react to the interview questions from the perspective of their associated stakeholder group.

In situations where respondents found a question too broad, or if they had any other difficulty in understanding or responding to a question, an attempt was made to clarify the question. For example, respondents were reminded of the variety of subject areas they might

refer to in their responses; i.e. physical/natural, cultural/social, government/political, or economic. If the difficulty persisted, further guidance was provided through the use examples or 'for instance' responses. To avoid biasing the interview results, care was taken to ensure that examples provided during the interview process related to completely different topics.

3.1.3 Analysis of Interview Results

Due to the method of sample selection, the semi-structured format of the interviews, and the qualitative nature of the responses, formal statistical analysis techniques were not employed to analyze the interview results (Rita & Moutinho 1994). Instead, this study adopted a more qualitative approach to analyzing interview responses.

After all stakeholder interviews were completed, responses were examined and reduced to their most primary issues. While every attempt was made to clarify issues during the interview process itself, the complexity of responses and the use of colloquial language by respondents often precluded the precise documentation of specific issues. In some cases, respondents identified several key issues within a single statement, while other respondents would repeatedly identify the same issue throughout the entire interview. A post-interview examination of responses allowed key issues to be identified and documented in a more clear and concise manner. The average interview lasted approximately two hours and 15 minutes, with the longest interview lasting six hours and the shortest interview lasting 45 minutes. Issues identified in the interview process represent the basis for the policy framework objectives and components.

3.2 Formulation of Policy Objectives & Components

In formulating policy objectives, key issues identified from the interview process were first examined and grouped into general categories. The categories were chosen in a subjective manner, to reflect basic similarities and relationships between the identified issues. Guidance in developing the categories was also derived from examples of ecotourism policies and strategies found within the literature. The number of subject areas changed throughout the policy formulation process, as inter-relationships among key issues became more apparent.

After all identified issues were grouped into general categories, a draft set of policy objectives were formulated. One objective was formulated per category; in a form specific enough to address the content of the issues contained within the category, yet broad enough to incorporate the diversity of stakeholder interests associated with the issues. Care was also taken to ensure that the formulated objectives remained consistent with the overall goal of the policy framework.

After objectives were established, policy components were formulated to address each objective. More specifically, policy components were formulated to address the specific aspects of each objective; i.e. the stakeholder issues associated with each objective. Every attempt was made to ensure that all issues were addressed, however, this was not always possible. For example, issues relating to the 'extreme temperatures' and/or 'abundance of mosquitos' in Manitoba were raised in discussion but not explicitly addressed within the policy components because of their degree of constancy. An emphasis was placed on addressing the more "malleable" issues; i.e. issues that are "open to influence and intervention" (Majchrzak 1984). For example, issues relating to 'attitudes' and 'perceptions' are typically viewed as more malleable than those relating to natural processes (e.g. weather conditions). Studies that focus on malleable issues are recognized as having a much greater likelihood of producing useful, implementable recommendations (Majchrzak 1984). A total of 10 objectives and 37 polices were contained within the draft framework.

Silverman (1993) argues that good research involves going back to the research subjects with tentative results, and refining the results in light of the subjects' reactions. Following this line of logic, an iterative approach incorporating comments from two separate stakeholder review processes (discussed below) was used to develop the set of policy objectives and components presented in Section 6. An iterative approach not only allowed stakeholders the opportunity to review and comment on the research findings, but provided the primary researcher with time to reflect on the study's results and conclusions so that "limitations and lack of generalizability across different situations and methods (could be) more clearly understood" (Majchrzak 1984).

3.3   Policy Application Recommendations

The effectiveness of a policy is largely determined by its ability to be applied to the situation at hand. The tools used to apply or implement policies are commonly referred to as 'policy instruments' (Trebilcock et al. 1982). Policy instruments and general application recommendations for this study were identified from: (1) a literature review of instruments/applications used in ecotourism strategies and initiatives being undertaken at regional, national, and international levels; and (2) suggestions provided by respondents throughout the interview process. As with the policy objectives and components, policy application recommendations were determined using an iterative approach, based on stakeholder review and commentary.

3.4   Stakeholder Review of Draft Policy Framework

After a draft policy framework (including policy objectives, components, and application recommendations) was formulated, a two-stage stakeholder review process was undertaken, involving:

*   written and/or verbal commentary on the first draft policy framework; and

*   focus group commentary on a revised (second draft) policy framework.

Within the first stage of the review process, individuals who participated in the interview process were provided with a copy of the draft policy framework and asked to provide written and/or verbal commentary on its content. Select individuals not involved with the initial series of interviews were also provided with the opportunity to comment on the draft policy framework (Table 9). Individuals commenting on the draft policy framework who were not part of the initial interview process, were first provided with relevant background information on the policy formulation process. The only exception to this situation involved the unsolicited distribution of the draft policy framework throughout the Department of Natural Resources.

Respondents were given a two-week period to review and comment on the draft policy framework. Each respondent was reminded of the confidentiality of their reply. Specifically, respondents were asked to comment on:

Table 9
Additional Respondents Reviewing Draft Framework

Respondent Name (Specialization)	Stakeholder Group
1. Loretta Clarke (ADM)	Government (Provincial) (Tourism)
2. Merlin Shoesmith (ADM)	Government (Provincial) (Natural Resources)
3. Henry Goy (Tourism Development)	Government (Provincial) (Tourism)
4. Ken Hildebrand (Tourism Services)	Government (Provincial) (Tourism)
5. Wayne Neily (Operator)	Industry (Peregrine Heritage Tours)
6. Mike Reimer (Operator)	Industry (Seal River Heritage Lodge)
7. Patsy Barker (Operator)	Industry (Paddling Pursuits)
8. David Koritko (Operator)	Industry (Wilderness Odysseys)
9. Gaile Whelan Enns	ENGO (World Wildlife Fund)

- the effectiveness of the policies in addressing the identified issues; and

- recommendations for implementing/applying the policies.

Respondents were also provided with the opportunity to provide additional comments on any aspect of the draft policy framework. To facilitate the review process, respondents were provided with a self-addressed stamped envelope to return their comments.

Of the 30 draft framework policies sent out for review, 24 were returned with comments; 16 from the original group of interview respondents and 8 from respondents not involved with the interview process. Of exceptional note are the number of framework policies that were not returned by the government stakeholder group; respondents working with the Department of Natural Resources were directed not to return their comments, pending a more complete review of the draft policy framework by regional representatives throughout their Department. Unfortunately, while a complete Departmental review of the policy framework would have provided valuable commentary, the comments were not received. Over a period of two and one half months, five different requests were made regarding receipt of the commentary and five different promises were made regarding delivery of the commentary.

After all comments on the draft framework were received, they were examined and incorporated into a revised draft policy framework. A focus group was then held to gather stakeholder input around the revised document. A focus group approach was adopted to allow for interaction between stakeholder groups.

An interactive review process allows individuals to better understand the perspectives and concerns of other stakeholder groups, increasing the chances for consensus approval; an important ingredient for the long-term success of any policy (Ritchie 1988). In addition, interaction between individuals assists stakeholders in refining and clarifying their comments, resulting in more valuable commentary (Tull and Hawkins 1987). Focus groups also provide an opportunity for stakeholders to arrive at some level of consensus regarding future directions for the development of policy (Sinclair *pers. comm.* 1997).

The focus group took place over a four hour period and involved individuals from each of this study's identified stakeholder groups (Table 10). All participants were provided with a copy of the revised policy framework one week prior to the focus group. The focus group was facilitated by a qualified individual, unassociated with the research and without direct relation to any of the stakeholder groups. Results of the focus group were recorded by this study's primary researcher.

The focus group had two primary purposes:

1.   to help clarify issues raised from the stakeholder review of the first draft framework; and

2.   to arrive at some level of consensus regarding actions and responsibilities for implementing the policies.

Throughout the focus group, participants were asked to comment on several aspects of the draft policy, including: its appropriateness, its potential effectiveness, and the feasibility of implementation. Participants were also asked to provide recommendations for improvement and further development of the policy framework. Input from the focus group was then incorporated into the final policy framework, presented in Section 6.

Table 10
Focus Group Participants

Participant Name	Stakeholder Group
Dr. Richard K. Baydack	Facilitator
Joseph M. Keszi	Recorder
1. Barry Bentham	Government (Provincial) (Natural Resources)
2. Jan Collins	Government (Provincial) (Tourism)
3. Don Finkbeiner	Industry (Marketer)
4. Charlie Taylor	Industry (Operator & Association)
5. David Hatch	Industry (Operator)
6. Stanley Bear	Aboriginal
7. Gaile Whelan Enns	ENGO

4.0 THE MANITOBA CONTEXT

The complex nature of the policy arena requires that an effective policy be able to anticipate and adapt to a variety of challenges and opportunities. The policy formulation process requires that policy makers go beyond theoretical frameworks, and examine the actual conditions under which policies are introduced (Jacobs 1993). To set the context under which this study's research applies, this section provides general insight into Manitoba's tourism industry, the state of ecotourism in the province, and Manitoba's overall tourism policy environment.

4.1 Manitoba's Tourism Industry

Manitoba's tourism industry contributes over $1.1 billion in annual expenditures to the provincial economy and generates over 29,000 person-years of employment (Travel Manitoba 1998). The provincial government has identified tourism as one of Manitoba's top economic development opportunities, including it as one of the top 5 areas of focus in its framework strategy for economic growth.

The majority of tourism expenditures in Manitoba are generated by Manitobans travelling within the province, however, Ontario, Saskatchewan and the US states also represent important market segments. Increasingly, travellers from European and Asian markets are playing a greater role in Manitoba's tourism industry (Table 11).

Provincial government responsibility for the development of Manitoba's tourism industry sits with the Tourism and Business Development Branch, Department of Industry, Trade and Tourism. More specifically, tourism initiatives are administered under the general division of Travel Manitoba, through its three primary sections: Development, Marketing and Services.

Prior to its disbandonment in July of 1997, general private-sector tourism interests in the province were represented by the Tourism Industry of Manitoba (TIM). At present, the Manitoba Tourism Marketing Council (MTMC) remains the only broad-based private-sector tourism organization in the province; with representatives from across the province and from numerous tourism sectors. Private-sector tourism interests in Manitoba have also organized under a variety of special interest associations, including the: Manitoba Farm Vacation

Table 11
Visitor Trips and Expenditures In Manitoba

Traveller Origin	Expenditures ($ 000's)	Volume (person trips)
Manitoba	$570,000	6,169,000
Ontario	$80,030	283,000
Saskatchewan	$50,340	295,000
Other Canada	$167,070	267,000
North Dakota	$13,700	220,800
Minnesota	$21,895	209,300
Other U.S.	$63,120	202,300
U.K.	$6,945	16,200
Germany	$4,635	9,800
France	$980	3,500
Japan	$5,130	8,100
Other Foreign	$17,180	26,200
Outbound	n/a	110,000
TOTAL	$1,111,025	7,710,200

Source: Based on Statistics Canada Canadian and International Travel Surveys (1994)

Association (MFVA); Manitoba Lodges & Outfitters Association (MLOA); Manitoba Tourism Education Council (MTEC); and the Manitoba Recreational Canoe Association (MRCA).

Historically, Manitoba's strongest resource-based tourism markets have been the areas of hunting and fishing. Over the years, a well-established lodging and outfitting industry has developed to service these markets. Contributing to the success of Manitoba's lodging and outfitting industry has been the adoption of a province-wide catch-and-release fishing program. The first such program of its kind in North America, the catch-and release program has allowed Manitoba to maintain a healthy and stable population of sport fishing stocks.

Despite its past success, the lodging and outfitting industry in Manitoba is now beginning to face a shrinking market base. Market interest in traditional hunting and fishing

vacations is starting to decline as shifting demographics and environmental attitudes draw more people towards non-consumptive nature-based tourism activities. In an attempt to replace lost revenues, many lodges and outfitters in Manitoba have, or are contemplating, entering into the ecotourism market (Clarke *pers. comm.* 1997).

4.2   Ecotourism in Manitoba

Manitoba's current ecotourism industry is fragmented, with many existing lodges and outfitters trying to enter the market on a part-time basis (Clarke *pers. comm.* 1997). In 1993, there were an estimated 104 operators offering nature viewing tour packages in Manitoba, many of them based in the United States (Aronitz 1993). Regional community tourism associations are also starting to participate in ecotourism development activities, spawning a myriad of concept studies and action plans over the past few years. Presently, an association dedicated to the coordination of ecotourism interests in Manitoba does not exist.

Among those businesses who advertise themselves as ecotourism operators, a wide range of experiences and quality standards are evident. Unfortunately, while there are examples of businesses who deliver genuine ecotourism experiences, there are more examples of businesses who promote ecotourism products yet fail to comply with basic ecotourism principles. In fact, it may be argued that ecotourism, in its purest form, does not exist within Manitoba. It is not the purpose of this discussion to debate the degree to which ecotourism exists within Manitoba, but to recognize that it does not exist in its ideal form. A complete accounting of the degree to which ecotourism exists in Manitoba would require a comprehensive analysis beyond the scope of this study. While the remainder of this study commonly refers to 'Manitoba's ecotourism industry', it is acknowledged that the industry, in its present form, does not represent the purest form of ecotourism.

To date, most of the research surrounding ecotourism in Manitoba has focused on the cataloguing of potential sites and the collection of industry baseline data (Weaver et al. 1995). An in-depth analysis of Manitoba's ecotourism industry does not exist.

The most comprehensive analysis of Manitoba's ecotourism industry was carried out by

Weaver et al. (1995). As part of their baseline assessment of Manitoba's ecotourism industry, Weaver et al. surveyed twenty-four ecotourism operators and seven ecotourism marketers to identify barriers/opportunities that hamper/assist with the development of ecotourism in Manitoba. Presented in Appendix 8, these barriers and opportunities are classified into one of four categories: (1) Physical/Natural, (2) Cultural/Social, (3) Government/Political, and (4) Economic. In general, Weaver et al. (1995) identified a number of factors that characterize Manitoba's ecotourism industry, including observations that:

- many tour operators try and attract a variety of clients by offering both ecotourism and non-ecotourism activities;

- public lands form the majority basis for ecotourism activities;

- wildlife viewing is the most common ecotourism activity offered by operators (followed by photography, touring and camping), with route activities (e.g. hiking and canoeing) viewed as corollary events;

- mammals are the most popular wildlife species offered in tours (although birds and other species also attract attention);

- plants are viewed as important secondary product offerings;

- only larger ecotourism operations (located in Churchill) are part of larger organized tours, with many operators having no tour connections;

- operators have both a lack of, and demand for, ecotourism training;

- ecotourism activities are often offered as a side-line to other activities (including other tourism related activities);

- many government regulations, programs and departments are perceived negatively or are seldom accessed by operators;

- Travel Manitoba is viewed by operators as the most helpful government department;

- few operators identify physical barriers to their businesses;

- operators view Manitoba's wilderness and quality of environment as major opportunities;

- operators face difficulties in obtaining financing for ecotourism ventures; and

- most ecotourism operators experience no competition, but believe it would be healthy for the industry.

The Churchill region remains the most well-known ecotourism destination within the Province. Ecotourism activity within this region is primarily centred around polar bear viewing, however, whale watching, birding, and landscape/skyscape viewing tours are also present. It is estimated that the ecotourism industry contributes approximately one million dollars to Churchill's local economy each year (Weaver et al. 1995).

An abundance of ecotourism opportunities also exist outside of the Churchill region. Manitoba's extensive network of protected natural areas (including parks, wildlife management areas, ecological reserves, bird sanctuaries, provincial forests and heritage sites) have the potential to accommodate a variety of ecotourism activities. A sampling of natural areas in Manitoba with ecotourism potential are presented in Table 12. Although faced with a variety of opportunities, Manitoba's ecotourism industry is characterized by a lack of established ecotourism products (Clarke *pers. comm.* 1997, Hatch *pers. comm.* 1997, Johnson *pers. comm.* 1996).

4.3   Manitoba's Tourism Policy Environment

The primary legal framework governing the development and operation of Manitoba's tourism industry is contained within the province's Tourism and Recreation Act. Under this Act, the Minister of Industry, Trade and Tourism is charged with the administration of all government matters relating to tourist facilities and the tourist industry in the province (Manitoba Government 1988).

By Order-In-Council (793/91), authority for the licencing of resource-based tourism operations was transferred from the Department of Industry, Trade and Tourism to the Department of Natural Resources (DNR). The transference was one of many harmonization initiatives being applied to provincial government departments at the time, and was based on the belief that DNR could better manage the natural environment if it had control over resource-based tourism licensing (Collins *pers. comm.* 1997).

Table 12
Sample List of Natural Areas In Manitoba With Ecotourism Potential

Bakers Narrows Provincial Park	Amisk Provincial Park
Clearwater Lake Provincial Park	Caribou River Provincial Park
Grass River Provincial Park	Numaykoos Provincial Park
Paint Lake Provincial Park	Kettle Stones Provincial Park
Sand Lakes Provincial Park	Asesseppi Provincial Park
Spruce Woods Provincial Park	Duck Mountain Provincial Park
Turtle Mountain Provincial Park	Whiteshell Provincial Park
Hecla Provincial Park	Nopiming Provincial Park
Nelson River	Atikaki Wilderness Park
Riding Mountain National Park	Oak Lake/Broomhill
Oak Hammock Marsh	Elgin Reservoir
Lauder Sandhills	Broomhill Wildlife Management Area
The Poverty Plains	Oak Lake Marsh
Minnedosa Potholes	Minnedosa Refuge
Rosedale Demonstration Farm	Big Valley
Proven Lake	Onanole Wildlife Management Area
Lake Audy - Bison Enclosure	Assiniboine River Valley at Miniota
Arden Ridge - Sidney to Birnie	Hummerston Community Pasture
Fulford-Trail Walkway	Big Grass Marsh
Portia Complex and Jarvie Lake	Big Point
Delta Marsh	Brandon Hills
Pelican Lake - Ninette	Souris River Bend Wildlife Management Area
Snowflake Area	Portage Wildlife Management Area
Tolstoi	Red Pine Plantation
Moose Lake Road	East Braintree to Sprague
Dawson Trail	Pisew Falls
Bird River	Mars Hill
Libau - Scanterbury	Patricia Beach
Grant's Lake Wildlife Management Area	Narcisse Wildlife Management Area
Marble Ridge	Pembina Valley
Whitewater Lake	Sleeve Lake Wildlife Management Area
Mantagao Lake	Saint Lakes Area
The Fish Road	Turtle Marsh - Dauphin Lake

Source: Matrix Management (1991), Stilwell (1997)

responsibility for "advising the minister on matters respecting the issuance or suspension of licences" lies with the Licencing Advisory Committee (LAC) (Manitoba Government 1988).

The mechanism used to administer the licencing authority for resource-based tourism is clearly defined by legislation. Under Section 2.1 of the Tourism and Recreation Act, The LAC is cross-departmental group, comprised of persons from the: Department of Natural Resources; Department of Industry Trade & Tourism; Department of Northern Affairs; Department of Health; Department of Municipal Affairs; and the Liquor Control Commission.

While legislation clearly defines the authority and mechanism for resource-based tourism licensing, it does not define the manner in which licences are issued. The manner in which a licence is issued is determined by DNR's resource-based tourism licensing policy (herein referred to as the "licensing policy"). Since the licensing policy is not documented within DNR's Policy & Procedures Manual, it does not "officially" exist in the opinion of government (Tino *pers. comm.* 1997). However, the fact that the LAC issues licences in a discriminating manner provides evidence that some sort of policy (formal or informal) exists; officially or unofficially, the LAC implements this policy.

To a large degree, the policy implemented by the LAC is represented by a set of general guidelines. LAC guidelines provide the basis upon which resource-based tourism licences are issued (Collins *pers. comm.* 1997). Present LAC guidelines view "optimum sustained use of the resource as (the) first priority" in determining whether or not a licence is awarded, but also considers the (Licensing Advisory Committee n.d.):

- structure that will be built to accommodate tourists;
- availability of the natural resource that will be used by the tourism operation;
- presence of similar tourism operations in the area; and
- viability of the business operation.

LAC guidelines were originally developed for, and focus on, consumptive resource-based tourism markets; i.e. angling and hunting. Non-consumptive (i.e. ecotourism) operations have traditionally been omitted from the licensing process. However, recent revisions to LAC guidelines now contain provisions for the licensing of non-consumptive tourism operations in Manitoba (Collins *pers. comm.* 1997). Unfortunately, because the revised guidelines are not yet available for public release, the extent to which non-consumptive tourism operations are dealt

with is not determinable at this time.

Outside of LAC guidelines, there are no policies in place to direct the development of Manitoba's ecotourism industry. There are, however, a variety of related initiatives which may influence the development of Manitoba's ecotourism industry (see Section 1.5, Table 1). It is neither desirable nor possible to consider in detail all those areas which impinge on tourism policy making, however it is important to recognize that tourism policy must include considerations relating to both economic and non-economic factors (Bodlender et al. 1991). The scope of this study precludes an exhaustive examination of all related ecotourism initiatives, however, a brief summary is provided below for those initiatives with direct relevance to the development of ecotourism in Manitoba.

Manitoba's Sustainable Development Act

In 1997, the province passed a Sustainable Development Act to create:

"a framework through which sustainable development will be implemented in the provincial public sector and promoted in private industry and in society in general" (Manitoba Government 1997).

Section 3(2) of the Act states that "the government shall have regard" to sustainable development and the principles and guidelines it entails when reviewing and revising existing legislation and policies. Provided in Tables 13, 14 and 15, respectively, the province's sustainable development definition, principles and guidelines directly support the philosophy behind ecotourism and the development of an ecotourism industry in Manitoba. It must be noted, however, that while the Act was passed in 1997, it has not yet been promulgated.

Also contained within the Act is a requirement for the development of a provincial Sustainable Development Strategy. To construct this Strategy, the province has begun creating a series of component strategies that address specific economic, environmental, resource, human health and social policy sectors. Already completed, and of direct relevance to the development of ecotourism in Manitoba, is the Land and Water Strategy (LWS).

Manitoba's LWS addresses the development, use, conservation and protection of the

Table 13
Sustainable Development Definition For Manitoba

Sustainable development means meeting the needs of the present without compromising the ability of future generations to meet their own needs.

Source: Manitoba Government 1997

Table 14
Guidelines for Sustainable Development In Manitoba

1. EFFICIENT USE OF RESOURCES - which means:
(a) encouraging and facilitating development and application of systems for proper resource pricing, demand management and resource allocation together with incentives to encourage efficient use of resources; and
(b) employing full-cost accounting to provide better information for decision makers.

2. PUBLIC PARTICIPATION - which means:
(a) establishing forums which encourage and provide opportunity for consultation and meaningful participation in decision making processes by Manitobans;
(b) endeavouring to provide due process, prior notification and appropriate and timely redress for those adversely affected by decisions and actions; and
(c) striving to achieve consensus amongst citizens with regard to decisions affecting them.

3. ACCESS TO INFORMATION - which means:
(a) encouraging and facilitating the improvement and refinement of economic, environmental, human health and social information; and
(b) promoting the opportunity for equal and timely access to information by all Manitobans.

4. INTEGRATED DECISION MAKING AND PLANNING - which means encouraging and facilitating decision making and planning processes that are efficient, timely, accountable and cross-sectoral and which incorporate an inter-generational perspective of future needs and consequences.

5. WASTE MINIMIZATION AND SUBSTITUTION - which means:
(a) encouraging and promoting the development and use of substitutes for scarce resources where such substitutes are both environmentally sound and economically viable; and
(b) reducing, reusing, recycling and recovering the products of society.

6. RESEARCH AND INNOVATION - which means encouraging and assisting the researching, development, application and sharing of knowledge and technologies which further our economic, environmental, human health and social well-being.

Source: Manitoba Government 1997

Table 15
Principles of Sustainable Development In Manitoba

INTEGRATION OF ENVIRONMENTAL AND ECONOMIC DECISIONS

1(1) Economic decisions should adequately reflect environmental, human health and social effects.

1(2) Environmental and health initiatives should adequately take into account economic, human health and social consequences.

STEWARDSHIP

2(1) The economy, the environment, human health and social well-being should be managed for the equal benefit of present and future generations.

2(2) Manitobans are caretakers of the economy, the environment, human health and social well-being for the benefit of present and future generations.

2(3) Today's decisions are to be balanced with tomorrow's effects.

SHARED RESPONSIBILITY AND UNDERSTANDING

3(1) Manitobans should acknowledge responsibility for sustaining the economy, the environment, human health and social well-being, with each being accountable for decisions and actions in a spirit of partnership and open cooperation.

3(2) Manitobans share a common economic, physical and social environment.

3(3) Manitobans should understand and respect differing economic and social views, values, and traditions and aspirations.

3(4) Manitobans should consider the aspirations, needs and views of the people of the various geographical regions and ethnic groups in Manitoba, including Aboriginal peoples, to facilitate equitable management of Manitoba's common resources.

PREVENTION

4. Manitobans should anticipate, and prevent or mitigate, significant adverse economic, environmental, human health and social effects of decisions and actions, having particular careful regard to decisions whose impacts are not entirely certain but which, on reasonable and well-informed grounds, appear to pose serious threats to the economy, the environment, human health and social well-being.

CONSERVATION AND ENHANCEMENT

5. Manitobans should:

(a) maintain the ecological processes, biological diversity and life-support systems of the environment;

(b) harvest renewable resources on a sustainable yield basis;

(c) make wise and efficient use of renewable and non-renewable resources; and

(d) enhance the long-term productive capability, quality and capacity of natural ecosystems.

REHABILITATION AND RECLAMATION

6. Manitobans should:

(a) endeavour to repair damage to or degradation of the environment; and

(b) consider the need for rehabilitation and reclamation in future decisions and actions.

GLOBAL RESPONSIBILITY

7. Manitobans should think globally when acting locally, recognizing tat there is economic, ecological and social interdependence among provinces and nations, and working cooperatively, within Canada and internationally, to integrate economic, environmental, human health and social factors in decision-making while developing comprehensive and equitable solutions to problems.

Source: Manitoba Government 1997

province's natural, environmental, heritage and cultural resources. The LWS is comprised of a series of substrategies that relate to the areas of water, forests, natural lands and special places, fisheries, soils, minerals, wildlife and others. A review of these substrategies, and the policies contained within them, details a policy environment that further supports the development of ecotourism in Manitoba.

Manitoba's New Parks System Plan

As a requirement of Manitoba's new Provincial Parks Act, the province has begun development of a new provincial parks system plan. The plan is being developed to ensure that an organized approach is taken to park protection, use and development over the long term (Manitoba Natural Resources 1996). Although not yet completed, the new parks system plan identifies specific land-use categories (LUCs) within each of Manitoba's provincial parks. Six different LUCs are identified: Wilderness, Backcountry, Resource Management, Recreational Development, Heritage, and Access. While recreational activities are allowed in each of these LUCs, varying restrictions on infrastructure development (including base camp, accommodation, and access provisions) have the potential to influence the development of ecotourism in Manitoba.

National Parks Act and Parks Canada Operational Policies

While it does not have a direct mandate relating to the development of tourism, Parks Canada does have a role to play in recognizing and supporting the tourism industry. More specifically, Parks Canada has a role to play in: presenting an image of Canada to visitors; in helping to maintain a sound and prosperous economy; and fostering sustainable development that benefits local communities. However, while it may support tourism, the National Parks Act clearly identifies the maintenance of ecological integrity, through the protection of natural resources, as Parks Canada's primary mandate. The protection of ecological integrity holds first priority in all park zoning and visitor use decisions (Canadian Heritage 1994).

To ensure fulfilment of its primary mandate while allowing for the recreational

enjoyment and use of national parks, Parks Canada has adopted a set of guiding principles. Outlined in Appendix 9, these principles contain the key policy elements that guide Parks Canada operations. The application of these principles is detailed in a series of more specific operational policies (National Parks Policy, national marine conservation Areas Policy, Canadian heritage Rivers System Policy, National Historic Sites Policy, Historic Canals Policy, Federal Heritage Buildings Policy, Heritage Railway Stations Policy). A review of these operational policies shows that Parks Canada generally supports the philosophy and development of ecotourism in and around national parks and heritage sites. Limitations placed on visitor activities and the development of infrastructure allow for the development of a variety of recreational activities while respecting the ecological integrity of the host area.

Framework Treaty Land Entitlement Agreement

On May 29, 1997, the Manitoba Government signed a Framework Agreement with the Treaty Land Entitlement (TLE) Committee of Manitoba (representing the 19 Bands in Manitoba with unsettled land claims) and the Government of Canada. The Agreement initiates a formal process that provides for the settlement of all outstanding TLE claims in Manitoba. A major component of the TLE settlements will involve the transfer of unoccupied Crown lands from the provincial government to First Nation Bands (Treaty Land Entitlement Committee Of Manitoba et al. 1997).

The selection and transfer of Crown lands has the potential to impact upon a variety of third party interests, including those relating to tourism. Given the likelihood that the majority of selected lands will contain significant natural resource bases, public ecotourism development opportunities on Crown lands may be negatively impacted. Alternatively, the settlement of outstanding TLE claims may allow for increased ecotourism development opportunities for First Nations communities.

Royal Commission On Aboriginal People Report

Recently, a comprehensive report outlining the history of injustices carried out against

Aboriginal people was submitted to the Federal Government; i.e. the Royal Commission On Aboriginal People Report. Included within the Report are recommendations for mediating many of the negative impacts felt by Aboriginal people since the arrival of Europeans and the signing of Land Treaties. In addition to comprehensive recommendations relating to the general area of natural resources management, the Report contains specific recommendations relating to tourism development. The Report recommends that provincial and territorial governments take the following action with respect to outfitting:

> (a) increase their allocation of tourist outfitters' licences or leases to Aboriginal people, for example,

>> (i) by including exclusive allocations in certain geographical areas, as Ontario now does north of the 50th parallel;
>> (ii) by giving priority of access for a defined period to all new licences; and
>> (iii) by giving Aboriginal people the right of first refusal on licences or leases that are being given up.

> (b) not impose one particular style of outfitting business (lodge-based fly-in hunting and fishing) as the only model; and

> (c) encourage Aboriginal people to develop outfitting businesses based on their own cultural values.

Endorsed by the Assembly of Manitoba Chiefs, these recommendations have the potential to dramatically impact upon the development of ecotourism in Manitoba (Bear *pers. comm.* 1997).

4.4   Summary

Consistent with international trends, Manitoba's tourism industry is undergoing a period of growth and transformation. Faced with an increased demand for non-consumptive nature-based tourism experiences, both new and established tour operators are seeking to develop a variety of ecotourism activities. One of the most significant transformations involves lodges and outfitters currently involved with consumptive nature-based activities (e.g. hunting and fishing),

attempting to offer more non-consumptive tourism activities (i.e. ecotourism).

The growing popularity of Churchill as an ecotourism destination provides evidence that Manitoba has the potential to offer ecotourism experiences of an international calibre. Recent studies have identified a variety of potential ecotourism opportunities throughout the province. The development of these opportunities is subject to a variety of influences, including numerous public policies, legislation, and related initiatives. With the exception of a single set of outdated licensing guidelines, there are no policies in place to assist Manitoba's ecotourism industry in addressing these influences. Without a comprehensive ecotourism policy, Manitoba's ecotourism industry is at risk of developing in a less than optimal manner.

5.0 DEVELOPING AN ECOTOURISM POLICY FRAMEWORK

As emphasized in the preceding discussions, a comprehensive policy that incorporates the concerns of all stakeholder groups is critical to ensuring the successful development and long-term sustainability of an ecotourism industry. Following the outline presented in Section 3, stakeholders involved with this study were provided with the opportunity to respond openly and freely throughout the policy formulation process. Stakeholder input was never confined to pre-established categories or responses. Documenting the variety of stakeholder responses required the prudent use of interpretation and judgement.

Following the advice of Madjchrzak (1984), results of the research process are presented in as simple a form as possible. Study results are presented in a discussionary manner, revolving around the two research hypotheses adopted in this study. To honour some respondents' requests for anonymity, specific stakeholder comments are not presented in this study. The discussion of stakeholder input is presented in a more general fashion, with analysis relating to general stakeholder groups.

5.1 Issues Identified By Respondents

Respondents identified a total of 59 issues during the interview process. Presented in Table 16 (3 parts), these issues are grouped into eight different categories, relating to the areas of: Sustainability, Business Viability, Integrated Resource Management Planning, Infrastructure, Leadership and Cooperation, Marketing, Aboriginal Involvement, and Awareness and Understanding. As detailed in Section 3.2, the issues presented in Table 16 are based directly around respondents' commentary, however, the exact wording of the issues has been modified by the primary researcher to better communicate the substance underlying each issue. While the issues are documented as separate matters, a certain interconnectedness runs between them. In a similar fashion, the issue categories presented in Table 16 frequently overlap. As outlined in Section 3.2, the issue categories were determined through an iterative process, drawing from the insights of the primary researcher and examples contained within the literature.

Table 16
Ecotourism Issues Identified By Manitoba Stakeholders

Identified Issue	Stakeholder Group			
Grouping Category: Sustainability	G	P	E	A
• uncontrolled tourism can destroy a destination or resource	4	4*	4*	4
• ecotourism industry dependent upon the very same product it promotes	4	4	4*	4
• need to know about carrying capacities for ecotourism locations	4	4	4	
• maintenance of ecological integrity/protection of environment	4*	4	4*	4
• ecotourism initiatives can help ensure survival of natural areas	4	4	4	
• need for host areas to realize economic benefits	4	2	4*	4
• economic history and stability of host areas must be respected	4			4
• environment has value beyond its tourism value			4	4
• conservation efforts offer a competitive advantage for operators	4	4	4	
Grouping Category: Business Viability				
• availability of skilled local guides	2*	2*	1	1
• high rate of staff turnover		2		2
• basic business skills of entrepreneurs	3*	3*		2*
• high cost of liability insurance	2	2*		
• availability of financing opportunities	2	2*		2*
• part-time businesses have little available resources (temporal and financial) for training		2		2
• land tenure uncertainty	2*	2*	2	2
• lack of standardized product within the industry	2*	2*		2*
• quality control for guides	2	2		
• high cost of environmentally sound operations	2	2		

G = Government Stakeholder Group (Provincial & Federal)
P = Private Industry Stakeholder Group (Operators, Marketers, Associations)
E = Environmental Non-Government Organization Stakeholder Group (ENGOs)
A = Aboriginal Stakeholder Group (First Nations)

1 = Opportunity
2 = Barrier
3 = Opp./Barrier
4 = Neutral
* = Priority Issue

Formulation Of An Ecotourism Policy Framework For Manitoba

Table 16
Ecotourism Issues Identified By Manitoba Stakeholders

Identified Issue	Stakeholder Group			
Grouping Category: Integrated Resource Management Planning	**G**	**P**	**E**	**A**
• identification of areas with 'high ecotourism value'	2*	2*	2*	
• conflicts between consumptive and non-consumptive resource uses	2*	2*	2*	2
• recognition and respect for alternative resource based industries	4			4
• crown lands support majority of Manitoba's ecotourism operations	3	3*	3	3*
• ecotourism development may assist in achieving other policy goals	1		1	
• conservation efforts needed to meet market expectations		4	4	
• compliance/enforcement of existing regulations	2*	2*	2*	2
Grouping Category: Infrastructure				
• prime ecotourism sites are frequently the most sensitive sites	4	4	4	4
• infrastructure has ability to control visitor activity	4	4	4	
• availability of transport to ecotourism areas	3	3*	3	1
• lodging expectations of ecotourists	4	4	4	4
• availability of suitable accommodations	3*	3*		1
Grouping Category: Leadership & Cooperation				
• communication/coordination/cooperation among government departments and between levels of government	2*	2*	2*	2*
• communication/coordination/ cooperation among industry members	2*	2		
• need for consultation between government and stakeholder groups	2*	2*	2*	2*
• support for industry leadership	1	2		
• mechanism for cross-departmental ecotourism policy	2			
• credibility of ecotourism operations	2*	2		
G = Government Stakeholder Group (Provincial & Federal) P = Private Industry Stakeholder Group (Operators, Marketers, Associations) E = Environmental Non-Government Organization Stakeholder Group (ENGOs) A = Aboriginal Stakeholder Group (First Nations)	1 = Opportunity 2 = Barrier 3 = Opp./Barrier 4 = Neutral * = Priority Issue			

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Table 16
Ecotourism Issues Identified By Manitoba Stakeholders

Identified Issue	Stakeholder Group			
	G	P	E	A
Grouping Category: Marketing				
• need for marketing partnerships within the industry	2*	2*		2
• expense of buying into marketing & promotional opportunities	2	2*		
• need for ecotourism promotional material	2	2		
• pre-mature promotional efforts of new businesses	2*			
• need for broader promotional efforts that highlight all ecotourism areas in Manitoba		2*	2	
• target market scepticism surrounding authenticity of marketing claims	4	2*	1	2
Grouping Category: Aboriginal Involvement				
• ecotourism opportunities often located off reserve lands				2*
• aboriginal products provide an international competitive advantage	1	1	1	1
• interest in sharing Aboriginal culture without commercializing it				4*
• involvement of Aboriginal people when developing Aboriginal tourism products	4	4	4	4*
• further acculturation of Aboriginal people			4	4
• skill set of Aboriginal populations	2	2		3*
• involvement in tourism often viewed as supplementary income				2*
• opportunity to follow example of an established leader	1			1
Grouping Category: Awareness & Understanding				
• expectations about what ecotourism can provide to a community	4*	4	4	4*
• ecotourism sometimes viewed as threat by other resource use groups	2*	2	2	
• misconception about the concept of ecotourism	2*	2*	2*	
• knowledge of opportunities within the province	3*	3*	3*	3*
• knowledge of permitting and licensing system	2	2*		
• confusion about functioning of government	2	2*	2	2

To assist with documentation and discussion of the research results, a coding system is used to reference the stakeholder groups and issues presented within Table 16. Stakeholder groups are identified by the following letter codes: **G** = Government Stakeholder Group (Provincial & Federal); **P** = Private Industry Stakeholder Group (Operators, Marketers, Associations); **E** = Environmental Non-Government Organization Stakeholder Group (ENGOs); and **A** = Aboriginal Stakeholder Group (First Nations).

Numerical codes are used to classify stakeholder viewpoints regarding each of the identified issues. The numbers assigned to each issue are used for reference only, and in no way imply or reflect any degree of significance otherwise. Table 17 details the meaning behind each of the assigned numerical codes. A stakeholder group is documented as identifying an issue if at least one individual from that stakeholder group raised the issue in their interview.

Table 17
Numerical Code Descriptions

Code	Meaning of Numerical Code
1	Issue is perceived as an opportunity that can assist with the development of ecotourism in Manitoba.
2	Issue is perceived as a barrier that hampers the development of ecotourism in Manitoba
3	Issue is perceived as both a barrier and an opportunity influencing the development of ecotourism in Manitoba
4	Issue is perceived as an important factor in the development of ecotourism in Manitoba, but not necessarily perceived as an opportunity or a barrier. Issue is perceived more as a 'fact of life' than an opportunity or a barrier. Issue is classified as 'neutral' because it is not perceived as an 'opportunity' or a 'barrier', however, it is still perceived as important.

Within the overall category of *Sustainability*, the nine identified issues were largely perceived as neutral. All stakeholder groups identified a strong understanding of the importance of the natural environment and the need for its conservation. Ecotourism activities and conservation initiatives were also recognized as complementary undertakings. Only two groups, the ENGO and the Aboriginal groups, identified the importance of recognizing that the 'environment has value beyond its tourism value'. Each group recognized the necessity of providing economic benefits to host areas, with private operators identifying the high cost of purchasing supplies in remote and/or rural locations as a barrier to their operations. The government and Aboriginal groups were the only two groups to identify the importance of developing ecotourism activities in a manner respectful and non-conflicting with the economic structure/history of a host area.

Issues relating to *Business Viability* were generally identified as barriers. The most frequently identified barriers relate to the areas of financing, high costs, staffing, and quality control. The ENGO group is largely absent from this category, recognizing only two out of the ten identified issues. The two identified issues, 'availability of skilled local guides' and 'land tenure uncertainty', were also the only two issues in this category commonly identified by all stakeholder groups. While the latter issue was commonly perceived as a barrier, 'the availability of skilled local guides' was perceived differently among the groups. The private industry and government groups perceived the issue as a barrier, citing the absence of such guides; while the ENGO and Aboriginal groups perceived the issue as an opportunity, touting the number of amateur environmentalists and local Aboriginal people, respectively, who could act as part-time guides. Also of note, were the differing perceptions held by the private industry and government groups regarding the level of business skills among entrepreneurs. While each group identified both high and low levels of skills (opportunities and barriers), the government group perceived high level skills as the exception to the rule, while the private industry group perceived the exact opposite.

Issues relating to the area of *Integrated Resource Management Planning* brought out a variety of responses from interview respondents. While only seven issues are presented in this

category, the complexity and conviction associated with the issues accounted for a significant portion of interview of time. Two of the most emotional issues, relating to 'conflicts between alternative resource uses' and the 'compliance/enforcement of existing regulations', were commonly perceived as barriers among all stakeholder groups. There was a general consensus that more stringent and consistent regulations are needed to protect and help develop Manitoba's ecotourism industry. The recognition that 'crown lands support the majority of ecotourism operations' was also identified as a common issue, with each group perceiving the issue as both an opportunity and a barrier. All but the Aboriginal group identified the province as doing a poor job of identifying and protecting areas with 'high ecotourism value'. The 'opportunity for ecotourism development to assist with the achievement of other policy goals' was highlighted by both the government and ENGO groups.

Three out of the five issues identified under the category of *Infrastructure*, were perceived as neutral issues. Two of these neutral issues were common among the groups, 'acknowledging the sensitivity of ecotourism sites' and the 'lodging expectations of the target market'. The 'availability of transport to ecotourism areas' was also commonly identified among stakeholder groups, however, it was perceived differently. Government, private industry and ENGO groups perceived an absence of available transport as both an opportunity and a barrier; recognizing that a lack of transport helped to protect an area, but also dramatically increased the cost of reaching an area. Alternatively, the Aboriginal group perceived the issue solely as an opportunity, citing their experience and level of comfort in reaching remote areas. The Aboriginal group also perceived an opportunity to provide the type of accommodations the target market is seeking. The government and private industry groups recognized opportunities to partner with established Aboriginal and rural accommodations, but also perceived a lack of suitable accommodations across the province as a barrier.

The six issues identified under the category of *Leadership and Cooperation*, were generally perceived as barriers. Two of the issues, relating to poor 'communication, coordination, and cooperation among government departments and between levels of government', and the 'need for consultation between government and stakeholder groups', were

commonly perceived as barriers by all stakeholder groups. A poor 'level of communication, coordination and cooperation among industry members' was also perceived as a barrier by both the government and private industry groups. An overall absence of leadership within the province was also identified, with both the government and private industry groups questioning the credibility of certain operations. Private industry perceived a lack of government support for entrepreneurs wanting to take a leadership role, while government perceived their own level of support as an opportunity for entrepreneurs. Challenges in developing and coordinating ecotourism related initiatives across government departments were also cited by the government group.

As with the Integrated Resource Management Planning category, issues identified under the category of *Marketing* generated a great deal of emotion among respondents. The vast majority of the emotion was of a negative nature, with an 'absence of marketing partnerships', 'high marketing costs', and the 'need for broader promotional efforts' being cited as barriers. The government and private industry groups dominated issue identification in this area. Of particular interest is the issue relating to the existence of 'target market scepticism surrounding the authenticity of marketing claims'. While the government group perceived 'market scepticism' as a neutral issue, both the private industry and Aboriginal groups perceived the scepticism as a barrier. Alternatively, the ENGO group perceived market scepticism as an opportunity; forcing operators to develop authentic and quality ecotourism products.

All eight issues within the *Aboriginal Involvement* category were identified by the Aboriginal group. Unlike any of the other issue category groups, three of the issues within the Aboriginal involvement category were only identified by one stakeholder group; the Aboriginal group. Two of the three issues, 'ecotourism opportunities often located off of reserve lands' and 'Aboriginal involvement in tourism often viewed as supplementary income', were perceived as barriers; the third issue, emphasizing the desire of Aboriginal people to share their culture without commercializing it, was perceived as a neutral. The recognition that 'Aboriginal tourism products provide Manitoba with a competitive advantage in the international marketplace' was commonly perceived as an opportunity across all stakeholder groups. The importance of

involving Aboriginal people in the development of Aboriginal tourism products was also identified and perceived in a common manner (neutral) across all stakeholder groups. The Aboriginal group was in agreement with the government and private industry groups in identifying a lack of tourism skills among Aboriginal people, however, unlike the latter two groups who perceived the issue solely as a barrier, the Aboriginal group also perceived certain aspects of Aboriginal peoples' skill sets as a strength/opportunity.

Three out of the six issues found under the *Awareness and Understanding* category were commonly identified by all stakeholder groups. Each group recognized that 'community expectations' play an important role in ecotourism development, but did not perceive the issue as either a barrier or an opportunity. All groups were quite adamant in their perceptions regarding the functioning of government; a great deal of confusion within government processes was perceived as a barrier. Alternatively, the abundance of ecotourism opportunities in Manitoba was passionately perceived as an opportunity across all stakeholder groups, with respondents spouting off numerous examples of prime ecotourism areas. However, a general lack of public knowledge regarding these opportunities also led respondents to perceive the issue as a barrier. A general lack of knowledge, and misconceptions associated with the concept of ecotourism were also perceived as barriers by the government, private industry and ENGO groups.

5.2   Respondent Recommendations For Addressing Issues

In addition to being asked to identify policy issues, respondents were asked to provide recommendations for addressing the issues. While respondents were able to provide recommendations in some instances, the vast majority of issues received no recommendations whatsoever. For reasons outlined below, a detailed discussion of each recommendation is not provided in this section, instead, specific recommendations are incorporated directly into the policy framework presented in Section 6. A general discussion of the responses is, however, presented below.

Generally, recommendations for developing identified opportunities revolved around creating awareness about the specific opportunities. Promotion, education, and the creation of

partnership arrangements were the most popular recommendations for creating awareness about the opportunities. General recommendations for addressing the identified barriers revolved around the provision of funding dollars (for development and advertising), increasing communication between stakeholder groups, developing and enforcing regulations, and improving the credibility of operations through training programs and codes of conduct.

Throughout the interview process, respondents acknowledged the importance of identifying appropriate means for addressing the identified issues. A genuine inability to respond, rather than a lack of desire, seemed to be responsible for the shortage of recommendations. Respondents also seemed to be more interested in providing examples of identified issues, rather than developing solutions to the issues. Respondents who did not provide concrete recommendations generally responded in one of two ways.

In some instances, respondents simply acknowledged the complexity of the issue at hand and expressed their inability to make recommendations. The complexity of the situation at hand was often complicated by the fact that respondents would try and group several issues together when trying to think of a recommendation. For example, respondents would try and think of a single recommendation for 'developing marketing partnerships between tour operators who don't talk to each other and don't have the money to advertise anyways'. In these situations, attempts were made to clarify and/or simplify the issue statements, however, the efforts were rarely successful; the researcher was not always able to accurately clarify the issue during the interview process, and respondents preferred to use their interview time to deliver anecdotal evidence of the issues. In some cases, the relayed anecdotes did provide further insight into the associated issues, and helped to identify general directions that recommendations might take. For example, anecdotes relating to the inconsistent enforcement of existing regulations generated insight into the tenuous relationships that sometimes exist between operators and the need for all stakeholders to become involved in the enforcement process.

Another popular response to the request for recommendations involved the respondents simply describing a situation opposite to that being discussed. For example, when discussing the lack of financing opportunities available to tourism businesses, respondents would simply state

that 'more financing opportunities should be made available to tourism businesses'. While these types of observations provided some general level of guidance for addressing issues, they generated few concrete application recommendations.

5.3 Respondent Opinions On Associated Responsibilities

Similar to their experiences in developing recommendations for addressing the identified issues, respondents experienced a great deal of difficulty in assigning responsibility for addressing the issues. Difficulties in assigning responsibility appeared directly related to the respondents' inability to make recommendations for addressing the issues. Respondents who were able to make clear recommendations for addressing issues were also able to make recommendations for assigning responsibility, while respondents who were unable to make recommendations for addressing issues experienced difficulties in assigning responsibility. Responsibilities that were identified, related directly to the recommendations for addressing the issues, rather than the issues themselves.

Questions that attempted to differentiate between respondents' perceived views of responsibility and their normative views of responsibility almost always created a great deal of confusion and disinterest. Only two respondents were interested in discussing the differences in their perceptions, with both discussions turning into philosophical wanderings. Several respondents did express their lack of knowledge regarding the 'official' stakeholder group responsible for addressing the issue under discussion.

The only respondent commentary that was commonly brought out among all stakeholder groups referred to the role of government in addressing the identified issues. The government stakeholder group was perceived as being responsible, at least in part, for all of the issues discussed under this line of questioning. The private industry group was also delegated a certain degree of responsibility, primarily from the government and ENGO stakeholder groups, while the Aboriginal group was perceived as being responsible, at least in part, for addressing the issues relating to 'Aboriginal Involvement'.

5.4   Priorities Identified By Respondents

Although no limitations were placed on the number of priority issues that each respondent was allowed to identify, in the majority of instances, respondents chose to identify three priority issues. A greater degree of variation did occur, however, within the levels of priorities assigned to the identified issues. While some respondents felt it necessary to assign only one issue to each of the High, Medium, and Low priority levels, others identified several issues at the same level of priority. Overall, while respondents expressed a certain degree of conviction when identifying priority issues, the assignment of priority levels to those issues met with little care. Differentiation between priority levels appeared to be based more on a sense of obligation towards the researcher rather than any sort of genuine conviction.

Priority issues identified by each stakeholder group are incorporated into Table 16. Priority issues are identified in the Table using an asterisk (*). A stakeholder group is documented as identifying a priority issue if at least one individual from that stakeholder group identified the issue as a priority during their interview. Due to the unequal sample sizes among stakeholder groups and differences between the number of priority issues identified by each respondent, no reference is made to the number of times each issue was identified. Similarly, because of differences in the number of times each respondent assigned a particular priority level, no reference is made to the level of priority assigned to the identified issues.

The information contained in Table 16 is intended to provide a general overview of the priority issues among stakeholder groups. The priorities are assigned to issues in general; i.e. for priority issues that are perceived as opportunities and barriers (i.e. classified as a '3'), no distinction is made as to which perception is viewed as a priority. While the majority of priority assignments related directly to specific issues, in some instances priorities were assigned to statements that contained several issues. In other instances, priorities were assigned to application recommendations associated with the issues. In situations where priorities were not clearly assigned to a specific issue, judgement was used to clarify and assign the priority to a specific issue.

The identified priorities are wide ranging in their scope. In general, priorities identified

by the government and private industry group are more diverse than those identified by the ENGO and Aboriginal groups; with the government group identifying 19 priority issues, the private industry group identifying 23 priority issues, the ENGO group identifying 11 priority issues, and the Aboriginal group identifying 13 priority issues. The greater diversity of responses associated with the government and private industry groups may be due to their more comprehensive involvement in all aspects of the ecotourism industry, or may simply be attributable to the increased number of individuals interviewed from these groups.

Priority issues relating to the overall category of *Sustainability* were most frequently identified by the ENGO group. The government and private industry groups were in agreement with the ENGO group in recognizing the negative impacts associated with uncontrolled tourism and the general need to protect ecotourism resources. The ENGO group also assigned priority to the issue of 'providing host areas with economic benefits'.

Six out of the ten issues under the general category of *Business Viability* received some assignment of priority. Two issues, relating to the 'business skills of entrepreneurs' and the 'lack of standardized product within the industry' were identified as priority issues by each of the government, private industry, and Aboriginal groups. The availability of skilled guides and the uncertainties associated with land tenures were also perceived as priority issues, being identified by both the government and private industry groups.

Three issues relating to the category of *Integrated Resource Management Planning* generated priority rankings by each of the government, private industry, and ENGO groups; recognizing the importance of: 'identifying areas with high ecotourism value', addressing 'conflicts between consumptive and non-consumptive resource uses', and fostering a greater 'compliance/enforcement of associated regulations'. The private industry and Aboriginal groups also gave priority recognition to the fact that 'crown lands support the majority of Manitoba's ecotourism operations'.

Only two issues within the category of *Infrastructure* are identified as priority issues, relating to the availability of transport and suitable accommodations. Priorities assigned to these issues are associated with the government and private industry groups.

A certain degree of stakeholder consensus developed within the category of *Leadership and Cooperation*, with two issues being given priority recognition by each stakeholder group. Consensus issues dealt with 'communication, coordination, and cooperation among government departments' and the 'need for consultation between government and stakeholder groups'. The government group also identified the 'level of communication, coordination and cooperation among industry members' and the 'credibility of ecotourism operations' as priority issues.

With the exception of one issue ('the need for promotional material'), all issues within the category of *Marketing* were identified as priority issues. Priority assignments were mostly made by the private industry group, however, the government group did perceive 'pre-mature promotional efforts by new businesses' and 'the need for marketing partnerships' as priority issues. The ENGO and Aboriginal groups did not associate any degree of priority with issues under this category.

With one exception, perceived priorities within the category of *Aboriginal Involvement* were identified by only the Aboriginal group; the government group gave priority recognition to the fact that 'Aboriginal products provide Manitoba with an international competitive advantage'. The Aboriginal group perceived all issues within this category as priority, except those which relate to the 'further acculturation of Aboriginal people' and 'the opportunity to follow an established leader'.

All of the issues relating to *Awareness and Understanding* received some degree of priority recognition. Priority assignments were largely made by the government and private industry groups, however, some recognition was also provided by the ENGO and Aboriginal groups. 'Knowledge of opportunities within the province' was commonly perceived as a priority issue among all stakeholder groups. 'Misconceptions associated with the concept of ecotourism' also attracted priority attention, being identified by each of the government, private industry and ENGO groups.

As detailed in Section 3.2, issues identified through the interview process were clarified and formulated into a draft set of policy objectives and components. Examples of respondent recommendations for addressing the issues were also provided within the draft framework. To

improve the clarity of the draft document, and thus assist with the review process, comments relating to stakeholder responsibilities and assigned priorities were not included with the framework.

5.5   Commentary on 1st Draft Framework

On average, respondents commented on 27 different aspects of the proposed framework; with the greatest number of comments being 35 and the lowest number being 11. Two individuals responded in a written manner, outside of the response framework presented to them, and two individuals responded verbally. Eight respondents provided input in the 'additional comments section' at the end of the framework. A general discussion of trends found within the respondents' overall commentary is provided below.

A great variety of comments were generated from the stakeholder review of the first draft framework. Commentary was provided in both colloquial and more formal manners, and in both specific and general terms. In many instances, respondents simply commented using a check mark (✓), a 'yes', or a 'good' response. In other instances, respondents provided highly detailed suggestions regarding, for example, the reorganization of the policy framework. Generally, comments relating to perceived weaknesses or faults within the framework contained the most detail.

None of the respondents made direct reference to the effectiveness of the draft policies in addressing their concerns, however, comments relating to the wording of the presented issues, objectives and policies provided some evidence of perceived ineffectiveness. In the majority of instances, respondents provided suggestions for addressing their concerns relating to wording.

Similar to the interview process, comments and recommendations relating to implementation of the proposed policies were somewhat less than desirable. While a greater number of recommendations were made than in the interview process, some policies were left without any recommendations whatsoever. A number of the respondents recognized the importance of certain policies but questioned the ability of proposed recommendations to achieve the policies. In some instances, respondents used their past experiences with similar policy

recommendations to judge the potential success of the draft recommendations. Criticisms relating to implementation recommendations were rarely accompanied by alternative suggestions.

While no apparent trends were evident within each stakeholder group's comments, three general trends were evident throughout the overall stakeholder commentary. Respondents generally expressed a degree of discontentment with policies and implementation recommendations that sought to provide direct benefits to stakeholder groups other than their own. This trend is especially evident among those policies which sought to improve Aboriginal involvement in the ecotourism industry; where policies were perceived as 'biased towards Aboriginal people', 'unnecessary', and 'unrealistic'. Respondents recognized the importance of the Aboriginal tourism product, but did not perceive the need to provide 'preferential treatment to Aboriginal people'. As an additional example, some members of the private industry group expressed concern that the framework would provide new operators and/or new destinations with preferential treatment over established operators and/or destinations.

The second general trend evident within the stakeholder commentary relates to the issue of responsibility. As with the interview process, respondents were consistent in discussing the issue of responsibility, yet sporadic in their recommendations for assigning responsibility. The implementation recommendations associated with the policies did, however, bring some level of focus to the discussion of responsibility. More so than in the interview process, respondents recognized the importance of having all stakeholder groups involved with the implementation of policies; less overall responsibility was placed with the government group.

A subtle feeling of scepticism surrounding the policy framework as a whole was also evident throughout some of the respondents' commentary. The sources of this scepticism are varied, with some respondents questioning the role of an ecotourism policy, and some respondents simply doubting the government's ability to carry out the proposed policies. Commentary regarding the role of the policy was complex. Some respondents were respectful of the need for government to protect ecotourism resources, but questioned the role of government in providing development incentives above and beyond those already existing in the marketplace;

i.e. respondents believed that market incentives should be sufficient driving factors in developing an industry. Other respondents who questioned the role of the policy expressed concern that it would 'only create more government bureaucracy that will get in the way of developing the industry'. Alternatively, some respondents were simply unclear as to whom the individual policies were meant to apply. Commentary regarding the ability of government to carry out the proposed policies focused upon the difficulty of enforcing regulations, and the general complexity associated with the policy issues.

Although an emphasis was placed on reminding respondents (verbally and written) that the framework was a draft document and that the arrangement of the objectives and policies had no bearing on their relative degree of importance, five respondents made comments that suggested their beliefs were otherwise. Suggestions relating to the renumbering/re-organization of certain policies were made to 'place more importance and focus' on the policies. The avoidance strategy adopted by the Department of Natural Resources, discussed above, also provides evidence that the framework document was perceived in a manner different than its intent.

Every attempt was made to incorporate all comments into the revised (2nd) draft policy framework. When making revisions, a cross-referencing strategy was adopted to ensure that suggested revisions were not in conflict with the revisions/commentary put forward by other respondents. In general, while some comments disagreed with the proposed objectives and policies, individual comments were not in direct conflict with one another. In situations where proposed revisions were in obvious conflict with the issues identified in the interview process, judgement was used to try and arrive at a middle ground. Revisions were made with the understanding that they were part of an iterative policy formulation process.

5.6   Commentary on 2nd Draft Framework (Focus Group)

Participant discussion throughout the focus group was lively and informative. While general commentary and recommendations were made regarding the wording of the proposed framework, the general thrust of the objectives and policies remained unchallenged. Participant

commentary and recommendations primarily related to the general category of sustainability. The importance of distinguishing between separate issues, and the usage of appropriate terminologies within the policies was highlighted.

Difficulties were experienced in trying to maintain the initial schedule laid out for the focus group session. Regardless of the task at hand, participants consistently returned to the issue of stakeholder responsibility. In the interests of time, and in an attempt to maintain flow within the focus group session, scheduled questions regarding specific policies were forgone. The forgone questions related to the overall impressions generated by specific policies. Participants were provided with the option of discussing the forgone questions and policies after the focus group session, however, no additional commentary or request for commentary was received.

Participants expressed a passionate desire to discuss stakeholder responsibility and implementation of the proposed policies. In particular, the government stakeholder group was identified as a key player in all implementation discussions. Unfortunately, commentary rarely focused on one policy for any length of time, with participants preferring to jump from issue to issue. Efforts by the facilitator to maintain a consistent focus were largely met with futility. Participants were determined in their efforts to communicate their immediate thoughts, regardless of the issue at hand. Participants took an exceptional interest in relaying anecdotal evidence to highlight the issues underlying the proposed policies. Despite numerous requests by the facilitator and primary researcher, participants were generally reluctant to bring forward specific policy implementation recommendations.

Despite the sporadic and diverse nature of participant responses throughout the focus group, a strong level of consensus was reached towards the end of the session regarding further development of the policy framework. Participants were in unanimous agreement that:

- stakeholder involvement in the policy formulation process should continue;
- further discussion was needed to assign responsibilities and actions to the adopted policies, and that a neutral facilitator should be used during these discussions; and
- a multi-stakeholder advisory committee should be formed to oversee implementation of

the policy.

5.7   Summary

Based on the preceding analysis, it can be stated that a common set of issues relating to the development of ecotourism in Manitoba does exist among Manitoba's stakeholder groups. A total of twenty issues were commonly identified by Manitoba's stakeholder groups. The claim of commonality is made because each stakeholder group acknowledged the presence of the issues. Stakeholder perceptions associated with the issues were, however, somewhat less than common. Of the 20 common issues identified by Manitoba's stakeholder groups, 1 is perceived as an opportunity, 6 are perceived as barriers, 2 are perceived as opportunities and/or barriers, 7 are perceived as neutral issues, and 4 are perceived as a mixture of opportunities, barriers and/or neutral issues.

While a common set of issues exist, the degree of commonality associated with the issues is less than absolute. Only those issues perceived in the same manner, by all stakeholder groups, can be classified as absolutely common. Fourteen out of the 20 issues can be described as absolutely common, with 1 issue being perceived as an opportunity, 6 issues being perceived as barriers, and 7 issues being perceived as neutral issues. The presence of a common issue among stakeholders appears to be due more to individual self-interest than some level of innate commonality contained within the issue. That is, commonality is determined by individual perceptions, not the issues themselves. A common issue does not necessarily imply common perceptions.

Also evident within the preceding analysis, and common among stakeholder groups, is the recognition of need for a comprehensive ecotourism policy. However, while stakeholders may recognize a common need for a policy, the perceptions associated with this 'need' are varied. As is the case with the commonly identified issues, the 'common need' for a policy is due more to the overlapping self-interests of individual stakeholders rather than some level of innate need.

6.0   AN ECOTOURISM POLICY FRAMEWORK FOR MANITOBA

As detailed in the preceding sections, the policy framework presented below is primarily based upon the results of a comprehensive stakeholder consultation process. Stakeholder input was used to both complement and support the thoughts of leading ecotourism experts, and to identify key policy issues unique to Manitoba. To further guide the development of this framework, an overall policy goal was adopted.

Consistent with commonly accepted ecotourism principles and the overall vision of the provincial government department responsible for tourism development in Manitoba, the goal of the proposed policy framework is:

> To contribute to Manitoba's economic and environmental well-
> being by promoting the development of an ecotourism industry that
> is domestically viable, internationally competitive, and sensitive to
> the surrounding ecological, cultural and economic environments.

To accomplish this goal, objectives were developed for eight different policy areas (Table 18). Individual policies were formulated to achieve each objective and suggestions were made for application of the policies. A condensed version of these objectives and policies is presented and discussed below. A more complete presentation of the policy framework, including background discussions for each objective and policy, and recommendations for the application of each policy, is provided in Appendix 10. The appended version of the policy framework is presented in a structure similar to Manitoba's sustainable development policies, ready for further stakeholder consultation.

When analyzing the policy framework, it is important to recognize that the numbers assigned to the objectives and individual policies are for organizational purposes only. Assigned numbers do not reflect any degree of relative importance between the proposed objectives and policies. It is also important to note that the policy framework as a whole was informed through both the literature review and stakeholder consultation processes. The objectives, policies, background discussion, and application recommendations contained within the framework represent an amalgamation of leading thoughts from international ecotourism experts and Manitoba's stakeholder groups.

Table 18
Policy Framework Objectives

SUSTAINABILITY **Objective #1** *To ensure the development of Manitoba's ecotourism industry is carried out in a manner consistent with the concept of sustainability.*	*LEADERSHIP & COOPERATION* **Objective #5** *To establish an atmosphere that supports the development of leadership and cooperation within the industry.*
BUSINESS VIABILITY **Objective #2** *To facilitate the development of viable ecotourism operations that are able to meet the needs and expectations of domestic and international markets.*	*MARKETING* **Objective #6** *To promote marketing initiatives that assist in establishing Manitoba as a diversified and high quality ecotourism region.*
INTEGRATED RESOURCE MANAGEMENT PLANNING **Objective #3** *To develop a strategic and integrated approach towards ecotourism development, balancing ecotourism activities with alternative resource uses.*	*ABORIGINAL INVOLVEMENT* **Objective #7** *To enhance the opportunity for Aboriginal involvement in the development of ecotourism products.*
INFRASTRUCTURE **Objective #4** *To facilitate the development and maintenance of tourism infrastructure that meets the needs of the market and is respectful of local ecological, cultural and economic conditions.*	*AWARENESS & UNDERSTANDING* **Objective #8** *To improve the overall level of awareness and understanding regarding ecotourism development within the Province.*

6.1   Presentation of Policy Framework

Objective #1

To ensure the development of Manitoba's ecotourism industry is carried out in a manner consistent with the concept of sustainability.

Policy 1.1 Ecotourism activities shall be planned and developed in a manner that respects the economic integrity, and the ecological, cultural and visitor carrying capacity of the host area.

Policy 1.2 Monitoring efforts shall be undertaken to ensure that ecotourism development is being carried out in a manner that is respective of the environment and people.

Policy 1.3 The economic involvement of local residents in ecotourism development activities shall be encouraged.

Policy 1.4 The incorporation of conservation efforts into ecotourism development activities shall be promoted.

Objective #2

To facilitate the development of viable ecotourism operations that are able to meet the needs and expectations of domestic and international markets.

Policy 2.1 The level of business skills among present and potential ecotourism operators shall be enhanced.

Policy 2.2 A greater range of financing options for ecotourism development initiatives shall be supported.

Policy 2.3 Enhanced training opportunities for ecotourism guides shall be encouraged.

Policy 2.4 Efforts shall be taken to ensure that, respectful of carrying capacity considerations, ecotourism operations have access to crown lands and waters.

Policy 2.5 The quality and consistency of operator conduct shall be raised to a level that meets international expectations and supports the long-term viability of the industry.

Objective #3
To develop a strategic and integrated approach towards ecotourism development, balancing ecotourism activities with alternative resource uses.

Policy 3.1 Natural areas that provide Manitoba with a competitive advantage in the ecotourism marketplace shall be afforded equal consideration and protection from competing forms of resource development.

Policy 3.2 Efforts shall be taken to minimize conflicts between ecotourism operations and other types of resource uses.

Policy 3.3 Equal consideration shall be afforded to ecotourism development opportunities in both strategic and tactical resource-based development decisions.

Policy 3.4 Ecotourism development within protected natural areas shall be subject to special conditions to reflect the unique status of the areas.

Policy 3.5 Efforts shall be taken to ensure compliance with applicable government regulations and ecotourism standards.

Objective #4
To facilitate the development and maintenance of tourism infrastructure that meets the needs of the market and is respectful of local ecological, cultural and economic conditions.

Policy 4.1 Upgrading and/or utilisation of existing infrastructure shall be considered as an alternative prior to the undertaking of new construction activities.

Policy 4.2 In situations where new infrastructure development is needed, it shall be designed and built in a manner that minimizes negative ecological and cultural impacts, is complementary to the local landscape, and utilizes local materials and labor. Where it is physically possible, infrastructure development shall occur outside of protected natural areas.

Policy 4.3 Development of infrastructure that assists in minimizing negative ecotourism impacts, delivering educational components, and securing economic spin-offs shall be supported.

Objective #5
To establish an atmosphere that supports the development of leadership and cooperation within the industry.

Policy 5.1 Stakeholder opinion shall be incorporated into decisions that affect the development and operation of Manitoba's ecotourism industry.

Policy 5.2 Individuals and organizations with leadership abilities shall be identified and encouraged to move forward with ecotourism development initiatives.

Policy 5.3 The formation of public/private/community partnerships and strategic alliances relating to ecotourism development shall be encouraged.

Policy 5.4 Recognition shall be provided to operators who adopt and respect high level industry standards.

Objective #6
To promote marketing initiatives that assist in establishing Manitoba as a diversified and high quality ecotourism region.

Policy 6.1 The establishment of cooperative and affordable marketing partnerships shall be promoted.

Policy 6.2 Marketing research that assists in the identification and development of primary target markets shall be undertaken and distributed in a practical manner.

Policy 6.3 Ecotourism promotional efforts shall be diversified to promote areas across the Province, focusing on areas where visitor expectations can be met and where product supply and carrying capacity are in sync. Promotional material shall be designed and distributed in a manner consistent with target market expectations.

Policy 6.4 The effectiveness of ecotourism marketing efforts shall be monitored and adjusted to meet changing market characteristics.

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Objective #7

To enhance the opportunity for Aboriginal involvement in the development of ecotourism products.

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Policy 7.1 Preferential consideration shall be afforded to qualified Aboriginal people in matters concerning the development of new ecotourism opportunities that revolve around Aboriginal culture.

Policy 7.2 Consultation with local Aboriginal people shall be sought prior to the development or offering of Aboriginal products in ecotourism programs.

Policy 7.3 The development of specialized training programs and ecotourism strategies for Aboriginal communities shall be supported.

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Objective #8

To improve the overall level of awareness and understanding regarding ecotourism development within the Province.

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Policy 8.1 Efforts shall be taken to increase awareness about potential ecotourism opportunities within the Province.

Policy 8.2 The underlying concept of ecotourism, the activities it entails, and the potential benefits and costs associated with it shall be communicated across stakeholder groups.

Policy 8.3 The roles and requirements of government departments, as they relate to ecotourism development activities, shall be clarified and communicated across stakeholder groups.

6.2 Discussion of Policy Framework

As detailed in the preceding sections of this study, the policy framework presented above is the result of an iterative policy formulation process. The initial draft framework, represented by 10 objectives and 37 polices, evolved over the course of two separate stakeholder consultation processes to contain 8 objectives and 31 policies. A brief discussion of the final objectives and their associated policies is presented below.

The first objective set within the policy framework seeks to ensure that Manitoba's

ecotourism industry develops in a manner consistent with the concept of sustainability. To satisfy this objective specific policies are formulated to: limit overdevelopment of ecotourism areas; monitor the industry's impact on the environment and improve the knowledge base for future ecotourism decisions; and contribute back to the economic and ecological environment upon which ecotourism activities are based.

The second area of focus within the policy framework relates to the overall notion of business viability. To facilitate the development of viable business operations, policies are proposed to ensure that operators have the necessary skills to establish and maintain an economically viable operation, and to ensure that operators deliver tours in a manner consistent with market expectations. Efforts are also taken to improve the overall environment in which ecotourism businesses operate by proposing policies that: assist operators in dealing with economic barriers; increase the availability of skilled local guides; and reduce the uncertainty associated with using crown lands for ecotourism development purposes.

The third policy framework objective seeks to promote integrated resource management, balancing competing interests to ensure the 'best use' of a given ecotourism resource base. More specifically, this objective seeks to support the development of the ecotourism industry through policies that: protect valuable ecotourism resource bases from conflicting and inappropriate developments; minimize conflict between ecotourism operators and other resource uses; ensure ecotourism opportunities are fairly considered in resource development decisions; ensure ecotourism businesses operate in an appropriate and legal manner.

The fourth area of focus within the policy framework deals with the development of appropriate infrastructure for ecotourism operations. Policies associated with this objective seek to limit negative ecotourism impacts by promoting the use of existing infrastructure over new developments, and ensuring that any new infrastructure is designed and built in a manner consistent with the concept of ecotourism. Policies are also proposed to encourage the development of infrastructure that seeks to minimize negative ecotourism impacts and promote educational initiatives.

The fifth objective contained within the policy framework seeks to establish an overall

industry atmosphere that supports the development of leadership and cooperation. To accomplish this objective, specific policies are proposed to: ensure that stakeholder opinion is incorporated into ecotourism development decisions; establish a sense of leadership within the industry; promote the development of positive relationships among industry stakeholders; and support those operators who act as positive role models.

Addressing concerns relating to the overall area of marketing, the sixth framework objective seeks to establish Manitoba as a diversified and high quality ecotourism region. To accomplish this task, specific policies are proposed to: promote the development of marketing partnerships among industry members; provide valuable marketing information to industry members; design promotional efforts that reflect the abundance of ecotourism areas throughout the province, paying special attention to those areas able to meet market expectations and handle visitor impacts; ensure that marketing efforts are in line with target market characteristics; and contribute to future ecotourism marketing decisions.

The seventh objective set within the policy framework seeks to enhance the opportunity for Aboriginal involvement in the ecotourism industry. To help ensure that Aboriginal people remain in control of ecotourism efforts that seek to capitalize on their culture, policies are proposed to: provide Aboriginal people with first opportunity to develop ecotourism products around their culture; ensure ecotourism activities are not being carried out in a manner disrespectful of Aboriginal people; encourage communication and partnerships between Aboriginal and non-Aboriginal people; and ensure that interested communities have the training and strategic plans necessary for developing an ecotourism industry.

The eighth and final objective presented within the policy framework relates to the overall level of awareness and understanding towards ecotourism development within Manitoba. To improve this level of awareness and understanding, policies are proposed to ensure that developers are aware of available opportunities within the province, and that all stakeholders have a clear and consistent understanding of the industry, including the roles and requirements of government departments involved with the industry.

6.3 Summary

The policy framework presented and discussed above (detailed in Appendix 10) provides direction for the overall development of ecotourism in Manitoba. Although discussed as separate features, a certain degree of interconnectedness runs throughout all of the objectives and policies. It is the policy framework as a whole, rather than any one specific objective or policy, that provides the necessary guidance to oversee the strategic development of Manitoba's ecotourism industry.

7.0   CONCLUSIONS & RECOMMENDATIONS

7.1   Conclusions

Perceived as a panacea by many, and as a fraud by others, ecotourism is one of the most controversial terms in the tourism industry. While the guise of ecotourism is frequently used as nothing more than a hollow marketing ploy, this study is premised upon the belief that ecotourism means much more. Consistent with the principles inherent within the concept of ecotourism, this study formulated a policy framework for the development of an ecotourism industry in Manitoba that is sensitive to the surrounding ecological, cultural and economic environments. Incorporating input from industry, government, Aboriginal, and environmental non-government organizations, eight different policy objectives and thirty-one policy components were developed.

After a comprehensive review of ecotourism policies, strategies, and initiatives existing in other jurisdictions, it is evident that ecotourism has not yet attracted any sort of widespread attention from public policy-makers at local, regional, or international levels. Few examples of comprehensive policies were found, with the majority of ecotourism related initiatives centering around the development of guidelines, strategies, and marketing studies. Discussion with individuals from other jurisdictions does, however, indicate a growing recognition for the development of public policies relating to ecotourism.

While there are few examples of existing ecotourism policies, there is an abundance of related literature that can provide policy-makers with insight into some of the issues that must be addressed within such a policy. An examination of this literature revealed seven key issues that serve as the basis for the formulation of an ecotourism policy. These issues establish the need: for comprehensive stakeholder involvement; to manage and improve the net impact of ecotourism developments; to develop appropriate physical infrastructure; to address land-use conflicts; to create industry standards; to promote educational and training initiatives; and to provide financial assistance. To clarify and expand upon these key issues as they relate to Manitoba's ecotourism industry, twenty-two individuals from four different stakeholder groups were interviewed. Stakeholders identified a total of fifty-nine issues, with the government and

private industry groups being the most diverse in their responses.

The variety of issues raised in the interview process highlights the importance of the policy sub-system within the policy formulation process. While the literature (Ceballos-Lascurain 1996, Boo 1990, Ziffer 1989) may provide a basic understanding of key ecotourism issues, only the policy actors themselves can identify the local relationships associated with those issues. Personal interests and a familiarity with loca, economic, cultural, political and geographic conditions allowed stakeholders to identify a wide range of derivative issues similar to, but different than, those found within the literature.

The actual process of transforming stakeholder issues into a series of policy objectives and components was a unique and challenging process. Outside of the basic stakeholder issues, a diverse array of influencing factors, including political concerns, personal histories and personality conflicts, crept into the formulation process. To help manage these influences, an open and iterative policy formulation process, involving a stakeholder review of a draft policy framework and a focus group around a revised policy framework, was employed to arrive at the objectives and policy components presented in this study.

Throughout the formulation process, the analysis of policy issues and stakeholder comments was subject to a great deal of qualitative interpretation. While every attempt was made to apply a consistent level of interpretation, the sheer number of policy iterations generated throughout the formulation process raises questions about the ability of policy-makers to maintain a consistent level of judgement. Policy-makers must recognize that they are subject to the same influencing factors as are other policy actors; i.e. varying levels of awareness, evolving self-interests, past experiences and changing moods. To counter potential lapses in judgement and/or misinterpretations by policy-makers, it is essential that checks and balances be incorporated into the policy formulation process. Stakeholder reviews not only help to balance interpretive judgements, but are critical in creating the stakeholder 'buy-in' necessary for implementing the policies.

Burr (1995) highlights the fact that despite the general acceptance of sustainable tourism practices, like ecotourism, a gap commonly exists between policy endorsement and

policy application. To bridge this gap, recommendations for applying the proposed policies were identified through the literature review and stakeholder review processes discussed above. Both processes identified a common need to develop policy application alternatives, however, application recommendations in general were difficult to identify.

While a certain degree of guidance can be derived from examples present within the literature, variant perceptions associated with policy issues and the need for 'buy-in' suggest that application recommendations are best generated by regional stakeholders. Within this study, however, stakeholders experienced a great deal of frustration in identifying application recommendations. Fuelling their frustration, was the overall issue of 'responsibility'. The complexity of inter-relationships between policy issues, solutions, implementation measures, and responsibilities appeared too great a challenge for stakeholders to conquer at one time. As the policy formulation process progressed, however, and the issues became more clear, stakeholders were more adept at identifying application recommendations. Based on this trend, future efforts at developing policy application recommendations, including the development of instruments and the assignment of responsibilities, should only be undertaken after all stakeholders have a clear understanding of the underlying policy issues. In particular, issues relating to responsibility appear to be best addressed after specific policy implementation recommendations are put forward.

Common Issues Among Stakeholder Groups

At the beginning of this study it was hypothesized that: (1) Manitoba's stakeholder groups would identify a common set of opportunities that enhance the development of ecotourism in Manitoba; and (2) Manitoba's stakeholder groups would identify a common set of barriers that hinder the development of ecotourism in Manitoba. In fact, certain commonalities did emerge from the interview process.

Out of the fifty-nine identified issues, twenty of them were common among all stakeholder groups. The perceptions associated with these issues were not, however, always in agreement. In some instances, common issues were perceived differently both within and among

stakeholder groups. Only fourteen of the identified issues were perceived in the same manner among all respondents, i.e. either as a barrier, an opportunity, or as a neutral issue (neither an opportunity nor a barrier). Based on these results, it is safe to say that a common set of issues exist among Manitoba's stakeholder groups. However, it is also apparent that individual levels of awareness, self-interest, past experiences, and present moods will influence the perception of these issues. In fact, the presence of common issues among stakeholders appears to be due more to these influencing factors than some level of innate commonality contained within the issues themselves.

In response to the hypotheses, it can be stated that Manitoba's stakeholder groups commonly perceive 'the international competitive advantage afforded by Manitoba's Aboriginal culture' as an opportunity that enhances the development of ecotourism in the province. In a similar fashion, commonly perceived barriers that hinder the development of ecotourism in Manitoba include: 'land tenure uncertainty', 'conflict between consumptive and non-consumptive resource users', 'compliance/enforcement of existing regulations', 'communication/coordination/ cooperation among government departments and between levels of government', 'the need for consultation between government and stakeholder groups', and 'confusion about the functioning of government'.

Expanding the scope of the hypotheses, it is also apparent that stakeholder groups perceive a common set of 'neutral' issues; i.e. issues that are perceived as important but not necessarily viewed as barriers or opportunities. Neutral issues were perceived more as the 'facts of life', and include the recognition that: 'uncontrolled tourism can destroy a destination or resource', 'the ecotourism industry is dependent upon the same product it promotes', 'ecological integrity/protection of the environment must be maintained', 'prime ecotourism areas are frequently the most sensitive sites', 'ecotourists have unique lodging expectations', 'it is necessary to involve Aboriginal people when developing Aboriginal tourism products', and 'expectations about what ecotourism can provide to a host community must be realistic'.

When analyzing the hypotheses, it is important to recognize that the use of unequal sample sizes among stakeholder groups may have had an adverse affect upon the research results.

A larger and more balanced sample size, i.e. a greater range of personal opinions and more representation from the Aboriginal and environmental non-government organizations, may have resulted in a different set of common issues. A revised and more accurate hypothesis might state that: *a common set of issues relating to the development of ecotourism in Manitoba exists among stakeholder groups, however, the degree of commonality will be influenced by individual levels of awareness, self-interest, past experiences, and present moods.*

The recognition that 'common' policy issues may be perceived differently among stakeholder groups, and by individuals within the same stakeholder group, has several direct implications for policy-makers. First, policy-makers must not assume that policy issues common among stakeholders in one region are equally as common to similar stakeholders in another region. For example, while the industry stakeholder group in Manitoba perceived 'market scepticism' as a barrier to development of ecotourism, the same stakeholder group in another part of the world (e.g. Australia) may not perceive market scepticism in the same way. Because of their efforts to establish an accreditation system for ecotour operators, it may be possible that the industry stakeholder group in Australia perceives market scepticism as an opportunity; i.e. the presence of an accreditation system may allow Australian operators to take advantage of market scepticism by increasing their chances of luring a sceptic market away from other destinations.

Along the same line of thought, policy-makers must also be careful not to assume that a policy or policy instrument that is successful in one region, will be successful elsewhere. Researchers and policy-makers alike must recognize the importance of moving beyond the mere identification of issues, towards the exploration of perceptions associated with issues. While perception may not always equal reality, in the world of policy-making, it does at the very least dictate reality.

Ecotourism & The Policy Formulation Process

In addition to the conclusions and recommendations made above, several larger policy-related insights emerge from this study. First, it is apparent that the same intricate web of factors which influence the development of an ecotourism industry, also complicate the policy

formulation process. Most public policies are created from an existing set of practices, guided by an overall policy paradigm that has been built-up by influential policy subsystem members over the years (Howlett and Ramesh 1995). The concept of ecotourism, however, forces policy-makers to challenge this paradigm. The formulation of an ecotourism policy requires that the policy arena be expanded to include a variety of issues from three traditionally independent fields, i.e. ecology, sociology, and economics. Policy-makers must recognize the inter-relationships that exist between these fields, incorporating their associated concerns into the formulation process.

By necessitating a change in the way that people view the policy arena, the very concept of ecotourism complicates an already complex policy formulation process. Until the general concept of 'sustainability', i.e. the balancing of ecological, social and economic concerns, establishes itself as a commonly accepted policy paradigm, the formulation of ecotourism policy will remain stunted by the limitations of traditional policy arenas.

The complex nature of the ecotourism industry also hinders the ability of policy-makers to follow a set decision-making process. While a structured policy formulation model was developed and followed within this study, the actual decision-making processes employed within each stage of the model were far from linear. The variety of stakeholder viewpoints presented throughout the study precluded the use of a rigid set of decision-making criteria. Instead, similar to the 'incremental decision-making model' described by Howlett and Ramesh (1995), the decision-making processes adopted in this study were essentially political undertakings characterized by bargaining and compromise. An iterative process, based on stakeholder reviews, was used to identify a series of objectives and policies that represent the best balance between normative and politically feasible viewpoints.

The actual policy formulation process that ended up being adopted is best described as a marriage between traditional distributive and regulatory processes. That is, the benefits generated by the policy framework are largely targeted towards those operating within the ecotourism industry, while the costs are more evenly distributed among a wider stakeholder base. In some instances, it is the ecotourism operators who must bare the cost of the policies, while in

other instances the costs are more evenly shared among all stakeholder groups.

The degree to which costs are borne by specific stakeholder groups depends largely upon the types of instruments used to implement the policies, and the responsibilities associated with each instrument. Within this study, a combination of regulatory, incentive, educational and subsidy based instruments were recommended to implement the individual policy components. The exact allocation of costs among stakeholders is not clearly evident, however, since responsibilities associated with the instruments were not determined. Despite the absence of this information, several critical concerns emerge from around this topic.

First, the ability of stakeholders to comply with the regulatory aspects of the proposed ecotourism policies must be considered. If the policies place undue and/or unmanageable burdens upon stakeholders, they are not likely to be accepted, and thus ineffective in their purpose. In particular, the ability of industry members to generate and maintain a healthy rate of return on their investment must be maintained. The successful implementation of the policies requires that a balance be stricken between 'what is ideal' and 'what is possible'. While the purpose of the policies should be maintained, the manner in which they are implemented may require modification.

Even if stakeholders are able to meet the requirements of the proposed policies, they may not always have the desire to do so. While stakeholders identified a common desire for the formulation of an ecotourism policy, the process of adopting the policies may not be as attractive. For any number of reasons, stakeholders may perceive the opportunity cost of adopting the policies as too great a price to pay. To help overcome this perception, the benefits of adopting policies must be clearly stated and tailored to reflect the needs of each stakeholder group.

Above all, this work highlights the need for a comprehensive policy that can guide the development of a highly complex and growing ecotourism industry. Historically, because it is considered a service industry, tourism has been neglected within development literature and policy debates (Ceballos-Lascurain 1996). Policy-makers, analysts, and researchers may use this study to further examine and clarify the interrelationships between policy, tourism development and the surrounding environment. An integrated approach is essential for ensuring the

development of a sustainable ecotourism industry.

Critical Issues

The policy framework presented in this study was formulated to facilitate the development of a truly sustainable ecotourism industry in Manitoba. Together, the proposed objectives and policies provide the strategic direction necessary for an industry still in its infancy stage. There are, however, several critical issues that must be acknowledged before the policy framework can be successful in its task. While this study addresses certain aspects of these critical issues, their influence upon the development of an ecotourism industry merits special attention. When developing and implementing Manitoba's ecotourism policy, the following critical issues should always be considered within the decision-making process.

Political Will: The policy framework presented in this study crosses the boundaries of several more established economic and political arenas. Given the relatively new and often misunderstood image of ecotourism, it is likely that the introduction of an ecotourism policy may be viewed as a threat within these arenas. A significant level of 'political will' will be needed to meet possible challenges against the introduction of the policy framework. Concentrated political support from all stakeholder groups is needed to help ensure that the further development and implementation of the policy framework is not superseded by more dominant and established interests. In particular, a clear and unified voice is needed to represent the ecotourism industry's concerns at the public table.

Financial Resources: The variety of policies and implementation recommendations made throughout this study require that significant financial resources be committed to developing Manitoba's ecotourism industry. Responsibility for providing these resources must not, however, remain solely with the public sector. While the Government of Manitoba must remain a key contributor of resources, especially at this early stage of the industry's development, all stakeholders must work together to identify and pursue partnership opportunities. The long-term

growth and survival of the industry will depend upon its ability to be self-financing. Regional tourism associations, industry tourism associations, provincial and federal government departments, First Nation governments, traditional lending institutions, and private investment must all be part of the financing solution.

Common Understanding: Highlighted within this study is the recognition that Manitoba's ecotourism industry does not exist in its ideal form. Also prevalent are a variety of viewpoints regarding the types of issues that must be addressed before the industry can progress to a more ideal form. However, while a variety of viewpoints are to be expected, a more common level of understanding is needed to ensure that development efforts work in a coordinated and consistent direction. A key ingredient in having all stakeholders working together is to ensure that they are all communicating at the same level. In particular, it is critical that all stakeholders accept the ecotourism industry as an economic animal. While the ecotourism industry may help to conserve the surrounding environment, the importance of maintaining a healthy level of economic returns must be a priority. The development of the policy framework, and the ecotourism industry as a whole, should not be viewed as a weapon against more established resource-based industries, but as an equal partner in the development of Manitoba's economy.

Stakeholder Buy-In: Without a comprehensive level of stakeholder buy-in, efforts to develop and implement the policy framework will remain unsuccessful. While further consultation with stakeholders may or may not serve to identify additional ecotourism issues or recommendations, their continued involvement in all stages of the formulation process is critical for creating an overall acceptance of the policy. In particular, greater efforts must be made to include members from the environmental and Aboriginal communities in the formulation process. Encouraging the participation of all stakeholder groups requires that an emphasis be placed on communicating the common issues among them.

Responsibility: As with many of the example policies and guidelines found within the literature,

further work is required to address the intricacies of applying the policy framework. It is clearly evident, however, that responsibilities associated with implementing the policies must be distributed among all stakeholder groups. Undue expectations and/or obligations placed upon any one stakeholder group may result in the disassociation of that group from the policy as a whole. While the government should take the lead role in developing policy, all stakeholders must accept the responsibility of contributing to its formulation and implementation.

Perspective & Adaptability: Despite its phenomenal rate of growth over recent years, ecotourism remains but one sector of the tourism industry. While efforts may be taken to develop that sector, its role within the 'larger picture' always be kept in perspective. In addition, it must be recognized that the ecotourism industry is subject to change; what is currently defined as ecotourism may not be so in ten years. Ecotourism policy must not be developed as a monolithic be-all and end-all type structure, but as an organic creature that is able to adapt to a variety of local, regional and international factors, including: ecological conditions, established and developing economic industries (tourism and otherwise); social values; and changing market preferences. Stakeholders must accept that ecotourism policy can never be black and white, only shades of green.

7.2   Where Do We Go From Here?

Due to the complexity and breadth of issues raised in this study, and the recognition that the presented policy framework represents a student thesis rather than official government direction, it is unrealistic to assume the direct application of all proposed policies at this point in time. Based upon priorities identified in the interview process; consensus opinions reached in the focus group; knowledge gained from the literature review; and insights obtained through the completion of this study, recommendations for the development and implementation of this study's results are provided below. In particular, and in keeping with the overall purpose of this study, an emphasis is placed on making detailed recommendations for the further development of the policy framework.

Recommendations are presented as a set of 'key steps' that need to be taken before Manitoba's ecotourism industry can begin to flourish. To assist with implementation, these steps are presented in a prioritized fashion. Specific actions that should be taken to complete the recommended steps are also provided.

While many of the recommendations presented below are interconnected with the 'application suggestions' presented throughout the policy framework, they differ in terms of stakeholder responsibility. While the 'application suggestions' presented within the framework are not intended to be stakeholder specific, recommendations presented in this section apply specifically to the Government of Manitoba. The sole assignment of responsibility to the Government of Manitoba is not meant to imply that the government alone is responsible for developing Manitoba's ecotourism industry, but rather, recognizes the pressing need for broad and strategic guidance at this early point in the industry's development. Specific recommendations for the determination of other stakeholder responsibilities are also provided below.

In priority order, the steps that should be taken to assist with the development of Manitoba's ecotourism industry are:

1.   Further Develop the Policy Framework

2.   Establish Industry Credibility

3.   Facilitate Product Development

4.   Market Manitoba As An Ecotourism Destination

1.   *Further Develop the Policy Framework*

The policy framework presented within this study should not be viewed as a final and all-encompassing representation of Manitoba's ecotourism policy; rather, the document should be viewed as a starting point within a detailed policy formulation process. To facilitate the continuation of this process, the Government of Manitoba should fist seek to:

i.   **Establish a Provincial Ecotourism Commission (PEC) that will be responsible for taking the lead role in further developing Manitoba's ecotourism policy.**

To promote an integrated management approach, and to ensure buy-in from all related government departments, it is recommended that the PEC contain representation from the Department of Industry, Trade, and Tourism, the Department of Natural Resources, the Department Rural Development, and the Department of the Environment. Due to their direct mandate and rapport with industry members, it is recommended that the Department of Industry, Trade and Tourism take the lead role in assembling the PEC. To help ensure that the PEC has the necessary political will to complete its tasks, Commission members should be appointed by their respective Ministers and be positioned, at a minimum, at the Assistant Deputy Minister level.

The PEC's primary role should be to ensure that work on the policy framework is carried out in an effective and efficient manner. The PEC should serve to help coordinate and approve provincial government responsibilities with respect to the completion of the policy framework. More specifically, the PEC should be responsible for ensuring that:

- relevant government departments and employees participate in the policy formulation process;

- necessary funds are available for public consultation and other related policy formulation activities;

- adequate staff time (labour) is allotted to help carry-out policy formulation activities; and

- the completed ecotourism policy is reviewed by their respective Ministers and, ultimately, the Cabinet.

After the establishment of the PEC, more direct efforts may be taken to continue with the policy formulation process. One of the more pressing concerns within the formulation

process at this point relates to the need to determine whether or not the policy framework is in line with other government policies and initiatives. The policy framework presented within this study must not be viewed as the sole influence upon the development of ecotourism in Manitoba. While a surface analysis of related government initiatives was undertaken, a more complete review of the policy framework by all related government departments is needed to help identify areas of potential conflict and/or opportunity. To address this need the Government of Manitoba, through the PEC, should:

ii.   **Conduct a comprehensive cross-departmental analysis of the policy framework, at both the provincial and federal levels, to identify areas of potential overlap with existing/proposed government policies and related initiatives.**

To facilitate the review process, staff time from the Department of Industry, Trade & Tourism, Tourism & Business Development Branch, should be allocated towards coordinating the review process. It is important, however, that the review process be conducted under the auspice of the PEC to help generate a sense of legitimacy and respect for the review efforts. Specifically, commentary on the policy framework should be sought regarding:

- the degree to which the proposed policies overlap with other provincial and federal policies, including the identification of potential conflicts;
- potential opportunities for linking policy 'application suggestions' with existing policy initiatives; and
- the effectiveness of the policies in addressing identified issues.

Inviting government departments to participate in the process will also help to raise awareness about ecotourism in Manitoba and add a sense of legitimacy to discussions surrounding its development. To further increase awareness about ecotourism in Manitoba, and to begin the process of creating a more comprehensive level of stakeholder 'buy-in', the

government of Manitoba, through the PEC, should:

iii.   Establish a multi-stakeholder Ecotourism Advisory Board (EAB) that can serve to assist the PEC with the policy formulation process, the eventual application of ecotourism policies, and general strategic development concerns.

To ensure that stakeholder viewpoints are integrated into decision-making processes, it is recommended that the Board include representation from each of Manitoba's stakeholder groups, including: ecotourism operators and marketers, industry associations, Provincial Government departments, the Federal Government, Aboriginal groups (including First Nations, Non-Status Aboriginal groups, and Métis groups), and environmental non-government organizations. Board members should be chosen according to their ability to represent and communicate effectively with their respective stakeholder group members. The exact composition of the Board should be designed to incorporate both technical expertise and practical experience.

In addition to the basic functions described above, the EAB should be responsible for acting as negotiator and/or arbitrator in conflict situations involving ecotourism stakeholders. To promote stakeholder participation in Board activities it is recommended that a neutral facilitator be contracted to oversee the functioning of Board meetings.

After an effective political infrastructure has been established, i.e. the creation of the PEC and EAB, and a comprehensive review of the policy framework completed, a wider consultation process to develop the policy may be undertaken. To begin this process the Government of Manitoba, through EAB, should:

iv.   Seek to establish a common level of understanding and awareness about Manitoba's ecotourism industry.

Establishing a common level of understanding and awareness will help to ensure that future policy formulation efforts move forward in a coordinated and consistent direction. Without a common understanding of the concept of ecotourism and about the issues surrounding its development in Manitoba, future consultation efforts may remain stunted by simple misunderstandings and preconceived notions. The process of creating awareness and understanding about Manitoba's ecotourism industry will require that a mix of educational and promotional initiatives be undertaken. Specifically, the Government of Manitoba, through the EAB, should:

a. **Undertake research to:**

• identify and clarify the roles and requirements of Provincial Government departments involved with the development of Manitoba's ecotourism industry; and

• establish a portfolio of ecotourism development opportunities, based upon existing literature, that are available within the Province.

b. **Develop and deliver an educational workshop for stakeholder groups that seeks to:**

• educate stakeholders about the concept of ecotourism, the principles it entails, and the benefits and costs associated with it;

• communicate the roles and requirements of government departments involved with the development of Manitoba's ecotourism industry;

• inform stakeholders about potential ecotourism development opportunities within Manitoba;

• address questions and/or concerns by stakeholders about the development of an ecotourism industry in Manitoba; and

• inform stakeholders about the development of an ecotourism policy and their upcoming opportunity to comment on it.

To ensure that relevant information is fairly distributed across the province, one workshop should be held in each of Manitoba's eight tourism regions. A printed version of the workshop material should also be made available for individuals unable to attend the workshops.

After a common level of understanding and awareness about ecotourism in Manitoba has been established, more comprehensive efforts to incorporate stakeholder opinion into the policy framework should be undertaken. Specifically, the Government of Manitoba, through the EAB, should:

v.   **Undertake a series of consultative workshops and meetings with stakeholder groups throughout the Province.**

Building upon the understanding generated through the previous set of recommended workshops, this series of workshops should seek to incorporate informed stakeholder opinions into the policy framework. More specifically, the consultation efforts should seek to:

- gauge public acceptance of the working definition and principles of ecotourism;
- identify stakeholder issues that may not have been identified in this study's research process;
- evaluate the effectiveness of the proposed policies in addressing identified issues; and
- generate recommendations for application of the policies, including the assignment of stakeholder responsibilities.

When conducting these consultation efforts, it is critical that discussions remain focused upon the task at hand. In particular, consultation efforts should avoid

becoming overly focused on developing/debating an all-encompassing definition for ecotourism. Too frequently, ecotourism planning efforts are stalled by these types of 'clarification' efforts; creating a sense of frustration and apathy among stakeholders. To ensure that policy development efforts proceed in an expedient and useful manner, consultation efforts should focus upon the principles inherent within the concept of ecotourism and the more substantive issues addressed within the policies.

In addition to generating valuable stakeholder input, a more extensive consultation process will increase stakeholder acceptance of the policy and help to generate awareness about ecotourism opportunities within the Province. To follow-up with the consultation efforts, the Government of Manitoba, through the EAB, should:

vi.   **Incorporate stakeholder commentary back into the ecotourism policy, and provide opportunity for stakeholders to review and comment on the changes.**

Providing stakeholders with the opportunity to review and comment on the results of the consultation efforts will help to further increase their acceptance of the policy and should provide members of the PEC with the political confidence necessary to submit the policy for cabinet approval.

2.   *Establish Industry Credibility*

An abundance of misleading 'ecotourism' advertisements in the marketplace have made ecotourists extremely wary of operators claiming to offer genuine ecotourism experiences (Keszi 1997). For operators, and the industry as a whole, to overcome this barrier, it is essential that a certain degree of credibility be established within the marketplace. To establish Manitoba as a credible, consistent, and quality ecotourism destination, the Government of Manitoba, through the PEC should:

i.   **Encourage and assist industry members to adopt a set of internationally acceptable ecotourism standards.**

Based upon examples of standards used in other geographic regions, it is recommended that Manitoba's standards be industry-driven and based upon a voluntary compliance system. Government involvement in the development of these standards should be limited to facilitation and promotional roles. Specifically, the Government of Manitoba should:

- undertake educational/promotional initiatives that encourage industry members to adopt a set of internationally acceptable ecotourism standards;

- provide industry stakeholders with examples of standards and 'codes of conduct' used in other geographic regions;

- assist industry members in coordinating their efforts to develop these standards;

- provide promotional recognition to ecotourism operators who adopt and comply with industry standards; and

- develop and distribute a 'Best Practices' publication that provides industry members with realistic suggestions for upgrading their operations to meet adopted ecotourism standards.

To address the attitudes and expectations of the target market, standards should be designed to address ecological, cultural and economic concerns. Standards should be developed for both tour operators and the tourists themselves (package travellers and independent travellers). There may be a need to make some standards sector specific, but their core principles should remain the same.

To address potential industry apprehension towards the adoption of business standards, educational/promotional initiatives should emphasize the ability of standards to provide operators with a competitive edge in the ecotourism marketplace. The adoption of standards will also help to ensure the long-term conservation of Manitoba's ecotourism resource base, and thus the long-term viability of individual ecotourism operations.

ii. **Encourage and support industry participation in an internationally accepted ecotourism accreditation program.**

To encourage and support industry participation in an internationally acceptable ecotourism accreditation program, the Government of Manitoba should:

- educate industry members about the benefits of participating in an accreditation program;

- provide operators with initial registration and/or evaluation fees; and

- support efforts by operators to comply with accreditation criteria.

3. *Facilitate Quality Product Development*

An apparent shortage of quality ecotourism product offerings is preventing the growth of Manitoba's ecotourism industry (Clarke *pers. comm.* 1997, Hatch *pers. comm.* 1997, Johnson *pers. comm.* 1997). After a set of industry standards are firmly in place, the Manitoba Government should undertake efforts to facilitate the development of quality ecotourism products. Specifically, the Government of Manitoba should:

i. **Facilitate the development and delivery of business training programs for present and potential ecotourism operators.**

Ensuring the effectiveness of these programs will require that they be designed in a manner that is sensitive to the educational, financial, and temporal needs of the operators.

It is recommended that a focus group be held to identify the key training needs of present and potential ecotourism operators. To ensure that a complete range of training needs are identified, the focus group should involve knowledgeable representatives from industry, government and First Nations stakeholder groups. When designing the specifics of the training programs, guidance may be sought from already established ecotourism training programs (i.e. those designed by *ecoplan:net* and/or *The*

Ecotourism Society). To address the financial and temporal needs of operators, it is recommended that specialized training programs be designed as a seminar series; delivered on a pay-per-visit basis at regional locations throughout the Province.

To enhance the effectiveness and attractiveness of the training programs, it is recommended that an Ecotourism Technical Advisory Committee (ETAC) be established to provide on-going support for program participants. The ETAC should be comprised of government employees who are knowledgeable in the specifics of the program content, and who can assist participants in applying the program teachings to their own operations.

ii.   Promote the establishment of marketing partnerships among industry members.

An apparent lack of cooperative marketing arrangements between industry members is hindering the development of Manitoba's ecotourism industry. To counter this hindrance, the Government of Manitoba should:

- educate ecotourism operators about the benefits of participating in cooperative marketing arrangements, emphasizing the role and importance of tour wholesalers;

- establish a forum where interested stakeholders can meet to discuss cooperative marketing arrangements and other development strategies; and

- provide start-up financial support to operators who want to develop and/or participate in cooperative marketing arrangements.

iii.   Facilitate the development of an ecotourism guide training program.

Manitoba is presently facing a shortage of qualified ecotourism guides. This shortage is apparently deterring existing operators from maximizing their tourism operations, and effectively prevents new operators from entering the market. To address this issue, the Government of Manitoba should support the development of an ecotourism guide training program.

To maximize the efficiency and effectiveness of this program, the curriculum should be developed in close consultation with local industry and established educational institutions. Guidance should also be sought from already established training programs, such as those offered in Australia and Peru, and through The Ecotourism Society and Ecoplan:net Ltd. To encourage industry acceptance of the program, an initial level of financial support should be provided to operators who hire graduates of the program.

4. *Market Manitoba As An Ecotourism Destination*

The search for instant success has led many ecotourism destinations and individual operations to partake in promotional activities before they are ready for market. These premature promotional activities often cause more harm than good, tarnishing the reputation of an area with strong ecotourism potential and limiting its long-term success. Ryel and Grasse (1991) emphasize that an ecotourism destination can not be marketed effectively until it has:

- developed adequate accommodations;

- an availability of knowledgeable and competent guides;

- proper access to ecotourism resource areas; and

- cooperative local or national governments.

After a comprehensive ecotourism policy has been adopted by all stakeholder groups, and a critical mass of qualified ecotourism operators has been established, the Government of Manitoba should take efforts to market the Province as an ecotourism destination of international calibre. Specifically, the Government of Manitoba should develop an ecotourism marketing strategy that:

- details an appropriate image for the Province to base its ecotourism marketing efforts around;

- includes provisions for promoting Manitoba's completed ecotourism policy to national and international markets;

- establishes goals for visitation levels and visitor satisfaction levels; goals must be

achievable and measurable, and should be developed for various market segments (e.g. wildlife viewing, canoeing, Aboriginal experiences, etc.);

- contains adequate provisions for advertising and direct sales (e.g. the development of brochures and support material for visitors, publication inserts, press releases, trade show attendance, familiarization tours, etc.).

7.3   Concluding Comments

Given the comprehensive nature of the issues, objectives, policies and recommendations contained within the policy framework developed in this study, the overall viability of implementing the policy framework has been drawn into question. In reality, the question of viability can only be answered by those stakeholders involved with the development of ecotourism in Manitoba. While the policy framework has been designed with the overall intent and potential to be integrated into the province's policy regime, its implementation is dependent upon the will and determination of individual stakeholders and their associated advocacy groups.

Implementation of the policy framework requires that individual stakeholders band together in support of an ecotourism industry in Manitoba. A concentrated effort is needed to lobby support for the further development and implementation of the objectives and policies presented in this study. Without a concentrated and coordinated effort to develop and implement the policy framework, Manitoba's ecotourism industry will continue to develop in a fragmented and inefficient manner. The strategic direction contained within the policy framework provides stakeholders with their best opportunity to maximize and capitalize on the benefits associated with ecotourism development. In particular, stakeholders must work together to ensure that ecotourism is provided a seat alongside the more traditional decision-makers at the resource allocation table. Ultimately, all stakeholders must accept responsibility for helping to develop Manitoba's ecotourism industry.

Not only is it important for all stakeholders to work together in developing Manitoba's ecotourism industry, but it is imperative that they work together in a timely and efficient manner. This study represents a leading initiative within North America, providing Manitoba with the strategic leadership necessary for capitalizing on the growing demand for ecotourism experiences. However, without immediate action to further develop and implement the proposed policy framework, the Province risks losing any foothold and/or advantage it may now have within the marketplace. While the challenges associated with implementing the policy framework are great, the opportunity costs of not implementing the policy framework are even greater.

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GLOSSARY

(The following definitions were largely taken from the Dictionary of Natural Resource Management, Julian and Katherine Dunster, 1996, UBC Press, University of British Columbia.)

Carrying Capacity: the maximum level of recreational use, in terms of visitor numbers and activities, that can be accommodated before a decline in ecological value, cultural value, or visitor experience sets in.

Cultural Diversity: The variety and variability of human social structures, belief systems, and strategies for adapting to biological situations and changes in different parts of the world.

Ecological Integrity: The quality of a natural, unmanaged or managed ecosystem in which the natural ecological processes are sustained, with genetic, species, and ecosystem diversity assured for the future.

Ecological Process: The actions or events that link organisms (including humans) and their environment, such as disturbance, successional development, nutrient development, carbon sequestration, productivity, and decay.

Host Area: The local area that supports ecotourism activities; includes ecological, cultural and economic dimensions.

Protected Natural Areas: Includes National and Provincial parks; Wildlife Management Areas; ecological reserves; bird sanctuaries; provincial forests; and heritage sites.

Stakeholder (Group): Anybody (or group) who feels that his/her interests will be affected by the outcome of a decision-making process. These interests do not have to be of a financial nature, but may include a whole range of human values, such as the need for natural justice, religious values, ecological principles, and a longing for environmental protection.

Sustainability: The ability of an ecosystem to maintain ecological processes and functions, biological diversity, and productivity over time. Consistent with Manitoba's Sustainable Development Act, the concept of sustainability is represented through a series of sustainable development principles and guidelines (see Tables 14 and 15).

Appendix 1
Potential Benefits and Costs of Tourism

Benefits	Costs
Economic/Financial	
- Foreign revenue for country - Funds for region (e.g. taxes) - Attraction of outside investment for local infrastructure/services - Diversification of local income - Service employment opportunities - Support employment opportunities (e.g. agriculture, fisheries, handicrafts, cottage industry) - Development of export markets for local products/foods etc. "Development pole" or "honeypot" multiplier effects	- Increased local cost-of-living - Seasonality of income or employment - Unstable market - Cost of enforcement/administration - Cost of training (guides, managers, etc.) - Liability of service providers
Political	
- Maintenance of populations in political boundary areas - Maintenance of future development options	Exposure of global public to antihumanitarian activities
Cultural/Social	
- Exposure to new lifestyles - Maintenance of traditional knowledge and products	- Disruption of culture - Loss of traditional knowledge - Degradation of local products - Enhanced local expectations due to exposure to affluent visitors - Increased out-migration
Environmental/Conservation	
- Incentives/funds for park/resource management - Incentives/funds for resource management research - Incentives/funds for natural history research - Improved environmental education - Accelerated development of an environmental ethic	- Resource degradation due to numbers or activities of tourists - Resource degradation due to increased local demands - Resource degradation due to unsuitable facility/infrastructure development - Resource degradation due to improper waste management

Source: adapted from US Congress, Office of Technology Assessment (1992)

Appendix 2
Saskatchewan Ecotourism Task Force Recommendations

1. That an accreditation program be implemented for Saskatchewan's ecotourism products and services, based on standards set by world-recognized authorities in the area. Further, that these accredited products and the overall accreditation program be incorporated into Tourism Saskatchewan's ongoing marketing activities.

2. That Elder's Guidelines established by the Federation of Saskatchewan Indian Nations and implemented by local bands be supported in regard to Aboriginal product development and marketing.

3. That interpretive services be required for all accredited ecotour packages, and that an inventory of such services be produced. This inventory would itemize the specialty and rates for available interpretive resources in the private, public and non-profit sectors, including specialists within the Federal and Provincial systems.

4. That a program be established to promote the visitor's responsibilities as an ecotourist, including involvement in ensuring that the services offered by our suppliers are consistent with their accredited status. The Montreal Declaration of the International Bureau of Social Tourism would be used as the basis for such a supplier-visitor record.

5. That a new 'outfitter' licensing category be established and implemented which recognizes the less consumptive nature of ecotourism-related businesses, and that this licensing incorporate guidelines based on a document developed for operators in the Manitou Sand Hills.

6. That efforts be undertaken to upgrade northern tourist facilities to ecolodge standards, in recognition of the overwhelming perception of northern Saskatchewan as the main ecotourism attribute of the Province. Facilitating investments by the Aboriginal community and developing a management mentoring program will be key to this process.

7. That culturally-unique services and attractions, such as vacation farms, overnight stays in teepees, dog-sledding and fowl suppers be encouraged and incorporated, where appropriate, as part of the accreditation program.

8. That tourism interests be directly represented in all land-use planning forums, and that regulatory authorities be required to utilize an interdisciplinary approach to all future land-use planning.

9. That co-operative relationships with other land users be confirmed by Statements of Mutual Recognition and Respect, formalizing a consultative process regarding future land-use plans.

10. That a process be established where visitors contribute a portion of their expenditures to a fund which has, as its objective, the preservation and enhancement of the natural environment at the local level.

11. That a principle of employing locally and using local suppliers be integrated into the accreditation program.

12.	That ecolodge facilities modelling sustainable systems and technologies be established by a non-profit organization (such as the Saskatchewan Research Council) in each of the Province's main ecozones. These operations could then act as a point of reference for those interested in establishing and/or upgrading their facilities on a more sustainable basis.
13.	That Crown-land lease policies be amended and guidelines prepared to allow for the establishment of ecotourism-related businesses. Also it needs to be determined whether a new tax assessment policy more conducive to multiple land-use and habitat preservation could be developed for land currently zoned as agriculture.
14.	That the Tourism Industry Association of Canada's Guiding Principles on Ecotourism be adopted by all stakeholders.
15.	That a three-part program be established to develop the ecotourism industry in Saskatchewan, including support for: • infrastructure projects which demonstrate innovative and environmentally-friendly technology; • assessment of the changes to environments that result from ecotourism activities, including baseline studies, monitoring and environmental audits; and • integration of ecotourism input into regional planning and development.
16.	That representatives of the ecotourism industry work with financial institutions to establish a lending program which would match a guaranteed/insured deposit base with targeted lending to ecotourism businesses.
17.	That Saskatchewan's ecotourism industry strongly support the introduction of sustainable tourism courses at the province's universities and technical institutions.
18.	That a strategy be formulated to accelerate market development of Saskatchewan's sustainable tourism products and services.
19.	That Saskatchewan ecotourism stakeholders initiate discussions with neighbouring jurisdictions for the purpose of developing integrated planning by ecozone.
20.	That the development of sustainable tourism policies be encouraged through continuation of the task force process, making adjustments as required, with the objectives of securing broad industry acceptance of these recommendations and determining the process associated with their implementation.
21.	That an accreditation process be established (who is accountable, for what and to whom) which could involve the formation of a body to oversee policies and programs designed to further develop sustainability in the industry.

Source: Saskatchewan Ecotourism Task Force (1998)

Appendix 3
Ontario's Resource-Based Tourism Policy (General Principles)

1. The provincial government will promote and contribute to the economic viability of the resource-based tourism industry.

2. The provincial government will facilitate economic opportunities for the resource-based tourism industry through its allocation of land and natural resources: the tourism industry will develop these opportunities.

3. The provincial government will ensure that Ontario's natural resources are managed sustainably for future generations; the tourism industry must share in responsibility and accountability, through resource stewardship, for the sustainability of the resources it uses and/or manages.

4. The utilization of natural resources by the resource-based tourism industry can be balanced and integrated with other users, be sequential, or be dedicated to tourism use.

5. The allocation of natural resources will be done in a fair an open manner that recognizes the resource-based tourism industry.

6. Resource users who get immediate and direct benefits must accept some responsibility, including costs. Responsibilities and costs will reflect the level or degree of allocation of natural resources.

7. Disputes over allocations, management of areas and other matters should be resolved through appropriate dispute resolution processes such as negotiation, mediation, or where necessary, through a fair, open and impartial appeal process.

8. This policy does not prejudice or affect in any way treaty and Aboriginal rights of Aboriginal People in Ontario.

9. The public is entitled to use Crown lands and waters and Crown resources for uses as described in provincial statutes and policies; exceptions must be justified.

Source: Ontario Government (1998)

Appendix 3 (Cont'd)
Ontario's Resource-Based Tourism Policy (Resource-Use Allocation Categories)

Basic Resource-Use Level
- no allocation of fish and/or wildlife resources
- allocation of land base for main lodge and cabins/outpost sites only
- opportunity for more secure tenure for site of buildings
- possible new stewardship responsibility

Enhanced Use of Resources
- minimal allocation of fish and/or wildlife resources
- allocation of land base for main lodge and cabins/outpost sites only
- opportunity for more secure tenure for site of buildings
- possible new stewardship responsibility
- possible increased restriction of access to resources for some users

Integrated Use of Resources
- allocation of fish and/or wildlife resources
- allocation of land base for main lodge and cabins/outpost sites only
- opportunity for more secure tenure for site of buildings
- new resource stewardship responsibilities by operator
- possible increased restriction of access to resources for some users
- shared allocation of Crown land for multiple resource use

Dedicated Use of Resources
- exclusive allocation of fish and/or wildlife resources
- allocation of land base for main lodge and cabins/outpost sites only
- opportunity for more secure tenure for site of buildings
- new resource stewardship responsibilities by operator
- increased restriction of access to resources for some users
- dedicated allocation and utilization of Crown land resources

Source: Ontario Government (1997)

Appendix 3 (Cont'd)
Ontario's Resource-Based Tourism Policy (Implementation)

1.   The government will negotiate matters that affect the resource-based tourism industry, such as phasing in, mitigating factors, timing and costs, through the Northern Ontario Tourism Outfitters Association. The Northern Ontario Tourist Outfitters Association will be responsible for ensuring the tourist industry is consulted and for reflecting the views of the industry in its negotiations with government. The government will continue to negotiate directly with Aboriginal tourist operators regarding their interests.

2.   During the development of any new processes, instruments, or administrative requirements to implement the resource-based tourism policy, the government commitment to minimize red tape will be recognized.

3.   Allocation of resources to the tourism industry will occur through land-use planning, to be carried out by the Ministry of Natural Resources beginning in 1997 and continuing through 1998.

4.   The government will establish and test a process to resolve disputes about allocations, management of areas, and other natural resource matters early in 1997.

5.   The Ministry of Natural Resources will develop mechanisms to provide increased security of tenure for the resource-based tourism industry.

6.   A method of valuing the resources allocated to the tourism industry will be developed.

7.   The government will establish a system of agreements between tourist outfitters and the Crown, where tourist outfitters will receive an allocation of resources in exchange for responsibilities such as resource stewardship and costs.

8.   Resource allocation and management decisions must be based on ecological, social and economic information: the government will work with partners to ensure acceptable standards for data collection and dissemination are established.

9.   The government will ensure that ongoing forest management planning has regard for the resource-based tourism policy. As a priority, additional implementation direction will be established for ongoing forest management planning, particularly the 1997 and 1998 forest management plans, to ensure they reflect the principles of this policy. The alternate dispute resolution process will be available for unresolved concerns.

Source: Ontario Government (1997)

Appendix 4
Nature-Tourism Issues In Nova Scotia

Environmental Conservation Issues

- low percentage (2.6%) of land designated as "protected areas".
- difficulty managing natural resources because high percentage (73%) of privately-owned lands.
- potential impacts on wildlife from increased visitation.
- perception of conflict between resource extraction industries and the interests of ecological protection and resource use.
- scavenging of archeological, mineral and paleontological heritage already present.
- coastal ecosystems already showing evidence of degradation.
- difficult to manage aesthetics of areas (litter, unsightly premises, obtrusive developments).

Sustainable Development & Use Issues

- need to improve mechanisms for building partnerships among stakeholders.
- increased tourism stresses the natural environment.
- new approaches for site development needed (to address issue of declining government dollars).
- safety of tourists -- increasing number of unqualified guides.
- liability of private land owners, when land is used for public tourism.

Awareness Issues

- need to coordinate marketing and development to prevent false expectations and unsatisfactory experiences.
- residents often unaware of opportunities within the Province.

Source: Government of Nova Scotia (1995)

Appendix 5
Alaska Wilderness Recreation and Tourism Association Guidelines

One: Businesses seek environmentally sustainable economic growth while minimizing visitor impacts on wildlands, wildlife, Native Cultures, and local communities by offering literature, briefings, leading by example, taking corrective action and other appropriate means.

Two: Travel modes and facilities used maintain a low impact on the natural environment; tour use is sustainable over time without significantly affecting the resource or negatively affecting the experience.

Three: Businesses provide direct benefits to the local economy and local inhabitants thereby providing an incentive for local support and preservation of wild areas and wildlife habitat.

Four: Businesses seek appropriate means to minimize their effects on the environment in all phases of their operations including office practices.

Five: Businesses ensure that managers, staff and contract employees know and participate in all aspects of company policy to prevent impacts on the environment, Native cultures, and local communities.

Six: There is an educational emphasis and purposeful desire for travellers to learn about the natural and cultural history of the places they visit.

Seven: There is a formula for the business and guest to contribute to local non-profit efforts for environmental protection.

Eight: The travel is in the spirit of appreciation, participation and sensitivity. At some point, a tour group becomes too large to be considered "ecotourism".

Source: Alaska Wilderness Recreation & Tourism Association (1995)

Appendix 6
Code of Conduct For Commercial Tour Operators in Gwaii Haanas/South Moresby, BC

PREAMBLE

This code of Conduct has been developed by the commercial operators and resource guides listed as participants in the Appendix (not provided within this reproduction). it has been developed, primarily, to regulate our own activities in Gwaii Haanas/South Moresby, and those of our guests.

The guiding spirit of this Code of Conduct is to ensure that we cause minimal impacts to the wildlife; wilderness, natural habitats, and the archaeological, cultural, and historical sites of Gwaii Haanas/South Moresby. We seek to preserve and protect this special place as it now is for the appreciation, enjoyment and enrichment of future generations.

The intent of this Code is to guide and regulate our own commercial operations. We also wish to inform, educate, and voluntarily involve all other commercial operators and private visitors who wish to protect in perpetuity, the opportunity for, and the quality of the exceptional experiences found in Gwaii Haanas/South Moresby. We will provide this Code to others when appropriate.

ETIQUETTE

Most of GH/SM is a wilderness area where people expect to have little or no evidence or signs of human activity. Most visitors want to experience the peace, quite and solitude of nature. We recognize the necessity to ensure that everyone can have this kind of experience. Specifically, we will:

1. Keep noise levels at a minimum in anchorages, campsites, on trails, etc. We will discourage loud music, limit excessive engine noises, and keep noise confined to our own group as is possible.
2. Whenever possible, communicate anchorage or campsites to other parties in advance and find another site if one is already occupied.
3. Not take pets (onshore).
4. Store personal gear together in an unobtrusive place when ashore.
5. Co-operate and communicate in a friendly and professional manner with other operators or parties.
6. Limit the size of our groups to 20 people and ensure that we have a knowledgeable guide for every 10 people.
7. Bathe in streams at the mouth, not upstream nor near frequented drinking water sources.
8. Be accurate and responsible with our advertising.
9. Discourage the collection of natural matter (such as shells, rocks), and forbid the collection of fossils.
10. Record and communicate to proper authorities (CHN, CPS, DFO, CCG), any questionable, problematic or unsafe activities.

Source: Hawkes and Williams (1993)

Wildlife
Part of the experience for visitors is to observe close-hand bird life, and marine and land mammals. In order to cause the least intrusion and disturbance to the natural patterns and behaviour of wildlife, we will at all times approach with care and sensitivity all sighted wildlife. We will:

Whales/Dolphins
1.   From a distance, determine the travel direction and diving sequence of the whales.
2.   Approach them slowly from the side and slightly to the rear, but not directly from the front or rear and position the boat parallel to the whales at a distance no closer than about 100 meters, at a speed that matches theirs, and avoid rapid changes in vessel course or speed - let the whales make the decisions.
3.   Be careful not to separate nor come between a calf and cow.
4.   Not interfere with the natural behaviour of whales, i.e. when orcas hunt and kill other mammals, or when they are resting.
5.   Move away slowly when finished whale watching.
6.   Be aware of what other operators are doing, communicate our intentions to each other and not box the whales in.
7.   Record sightings and observations in log.

Seabird Colonies, Bird Nesting Sites, Raptor Eyries
We recognize that the Queen Charlotte Islands are one of the major nesting areas for seabirds, shorebirds, raptors, etc., many of which nest in ground burrows. Birds are extremely vulnerable during nesting season and can be damaged or disturbed by human visitation at this time. All operators are encouraged to become knowledgeable about seabird colonies. Therefore, we specifically will:

1.   Have a knowledgeable guide accompany visitors onto seabird nesting areas.
2.   Obtain a map (such as Queen Charlotte Island Seabird Colonies map from Environment Canada) which shows types of birds, colony location, and nesting dates.
3.   Limit time spent ashore near open nesting sites. Particularly, avoid causing birds to fly off their eggs or leave their chicks, for example at any of the gull, cormorant, or murre colonies, or when near oyster catchers etc.
4.   Refrain from visiting sensitive sites such as: Anthony Islets, Rankine, Kerouard, E. Copper, Jeffrey, and Slug Islands
5.   Not camp nor have fires or bright stationary lights near known nesting sites.
6.   Not climb trees that contain eagle nests. Eagles are know to abandon nests when disturbed.
7.   Not climb cliffs near Peregrine falcon eyries.
8.   Not discharge firearms near nesting sites.
9.   Have no low fly-overs by aircraft of falcon eyries and eagle nests.
10.   Limit number of visitors in colony to 10 at any one time.

Source: Hawkes and Williams (1993)

Seals and Sea Lions

1. Not have low fly-overs (under 500 ft.) by aircraft, or close approaches by vessels that disturb animals at rookeries and haulouts.
2. Be alert to animal movements and leave immediately if more than 2 to 3 animals dive into the water.
3. Take extreme care to not surprise animals - proceed slowly from a direction where animals can see the boat. Approach from downwind.

Bears

1. Not feed or allow close approach to bears.
2. Store food caches at least 75 meters from tent sites.
3. Keep food cache covered and hung in a tree when not attended.
4. Never store food in kayaks or boats that are on the beach.
5. Ensure tents are not set on bear trails.
6. Be careful to not disturb nor come near bears during salmon spawning season.
7. Remain alter to bear sign and activity at all times, and be sensitive to the bear routes and patterns.
8. Report sites where bears have had problems with people.

Deer

Not touch or pick up any fawn even if it appears abandoned.

Visitor Safety

All commercial operations are conducted surrounded by the marine environment of the north Pacific. unpredictable local weather conditions, frequent high winds, strong currents, and extreme tides combine to create dangerous hazards for the unprepared visitor. We encourage the adoption by all operators of the highest degree of responsible operations, vessel standards, and crew/guide training. Some suggestions:

1. All vessel operators have experience with the waters of GH/SM before commencing a commercial venture.
2. All commercial vessels to be seaworthy, well maintained, well equipped, and meet all coast guard standards.
3. All crew to be trained in first aid (preferably advanced), hold radio operator's license and to be trained in marine emergency duties and have C.G. certification where required.
4. Vessels and aircraft to be available in an emergency situation, i.e. marine search and rescue or vessel in distress. Know how to prepare for a medical air evacuation.
5. Crew to monitor C.G. VHF Ch. 16.
6. We encourage all vessels (or groups of vessels) to have EPIRBs, or VHFs and extra safety equipment for emergencies (extra pumps, towing lines, smoke flares, etc.).

Source: Hawkes and Williams (1993)

Appendix 6 (Cont'd)
Code of Conduct For Commercial Tour Operators in Gwaii Haanas/South Moresby, BC

Guides
The need for guide standards has been discussed. Demonstrated skill, experience, training, local knowledge of GH/SM, including knowledge of its natural and cultural history, ability to lead a group, first aid, etc. are essential.

Archeological, Cultural and Historical Sites
We acknowledge and respect the Haida Nation's concerns regarding visitors to Haida archeological and cultural sites. Therefore, we will:

1. Attempt to make radio contact with haida Watchperson before arrival or go ashore and make contact, in order that Watchperson can coordinate with other visitors to limit the number of visitors in a site at any one time.
2. Have one guide per 10 guests when onshore. Limit group size to approximately 20.
3. Not camp on archaeological or sacred sites, i.e. Sgun Gwaii, Hotspring, House Island; not camp within 1 km of any Haida village site.
4. Not dig into middens or in any archaeological site; not touch nor remove any artifact, cultural or historical; not enter burial grounds.
5. Leave no garbage nor human waste in these sites.
6. When on Hotspring Island, no more than 14 people in 3 pools at one time, no more than 20 people onshore at one time. If another group is waiting, limit stay to 3 hours or less. Emphasize spiritual and botanical values of the island as opposed to a party and bathing attitude.
7. Remind any commercial photographers who are our guests that they should receive permission from the band council for taking pictures to be sold.

Burnaby Narrows
Burnaby narrows exhibits one of the special biological phenomenon in the Charlottes and is a popular site. As we are concerned about the possible deterioration of the site because of visitation and to lessen the impacts on marine life by heavy foot traffic, we will:

1. Advise all our guests of the possible impacts of foot traffic on marine life.
2. Attempt to use glass bottom viewers for non-walking, float-through tours of the Narrows.
3. Not gather, collect, nor harvest marine life in the Narrows.
4. Minimize camping activities and anchoring of vessels in the immediate vicinity.

Food Gathering
As part of our guests' experience we do catch and gather some seafood. We will educate and encourage our guests to limit their catch in order to ensure preservation of the resource, to reduce impacts on traditional fisheries, and to maintain the quality of the experience for the future. We support the conservation of marine resources as there is already a depletion of

Source: Hawkes and Williams (1993)

certain species, i.e. abalone, coho, rock scallops, and bottom fish in GH/SM. We will:

1. Limit our catch to what we can eat on the trip.
2. Discourage harvesting of purple hinged rock scallops.
3. As a result of coast wide closure, there is no harvest of abalone (until 1995).
4. Refrain from "catch and release" of salmon.
5. Be certain every person who fishes possesses a valid DFO license.
6. Maintain in our logs a record of fish and shellfish caught.
7. Limit the catch of salmon to one per license per day.
8. Discourage the harvest of shell fish in fragile areas.
9. Be aware of health risks associated with eating shellfish such as P.S.P. and allergies.
10. Discourage collecting of seafood while diving.

Garbage
With increased visitation in GH/SM by boats, aircraft, and people, there will be more garbage and human waste. We will operate utilizing 'no trace' practices. Specifically, we will:

1. Burn paper and organics below the high tide mark.
2. Dispose of our organics overboard when away from anchorages and moorings, preferable well off-shore.
3. Pack out all cans, plastics, bottles, and non-biodegradables.
4. Not discharge holding tanks while in anchorages or moorings.
5. When onshore or in campsites near the ocean, encourage the use of lower intertidal areas for a disposal of human waste. When latrines need to be established away from the shore, they will be at least 200 meters from any freshwater sources.
6. Use biodegradable soaps for dishes, bathing, laundry.

Camping
Most suitable camping sites (protected beach, good anchorage, water source, etc.) are also Haida archaeological sites which visitors should be aware of. We will:

1. Make sure all campsites are left in 'no trace' condition.
2. Build fires in foreshore, below high tide mark, away from driftwood. make sure fires are extinguished when unattended. use only driftwood for fires.
3. On popular, heavily-used campsites, we support the construction and use of latrines (outhouses).
4. Limit durations of stay to one week.

Source: Hawkes and Williams (1993)

Appendix 6 (Cont'd)
Code of Conduct For Commercial Tour Operators in Gwaii Haanas/South Moresby, BC

Local Involvement

Recognizing our involvement with the economy and people of the Queen Charlotte Islands, we will attempt to:

1.   Hire local people in our operations.
2.   Buy supplies and materials locally.
3.   Participate in local events and promote them to our guests.
4.   Encourage the on island provision of pertinent crew and guide training courses and programs.
5.   Improve communication between local people and ourselves.

Source: Hawkes and Williams (1993)

Appendix 7
Interview Dialogue (Scheduling)

- My name is Joe Keszi. I am a student working on my Master's thesis through the N.R.I. at the U of M. The reason I am calling you today is because I am interested in interviewing you as part of my thesis work.

- My thesis involves developing a framework ecotourism policy for the MB Government (through Travel Manitoba). The government is interested in this work because they recognize that the ecotourism industry is growing, and that a policy framework will assist them in promoting and guiding the development of this industry.

- In developing this policy framework, I am interviewing individuals from various stakeholder groups, including Industry, Government (Provincial and Federal), First Nations, and Non-Government Organizations (NGO's).

- After talking with numerous people in the industry, you were identified as a good person to speak with from the perspective of the (insert stakeholder group name) sector.

- The interview will last about one hour and will serve two basic purposes:
  (1) to identify/clarify key issues facing the development of Manitoba's ecotourism industry from the perspective of (insert stakeholder group name); and
  (2) to identify ways to address these issues.

- You should also know that all of the questions have been approved by the University Ethics Committee. The final thesis document will be available for public review, however, if you want, your answers will be kept in the strictest confidence and will not be associated with your name at all. Of course, you also have the option of cancelling the interview at any time.

- After all of the interviews have been completed, I will formulate a Draft policy framework that you will be invited to comment on. These comments will then be incorporated back into the policy framework, which will form the basis for my thesis.

- Are you interested in participating in this interview?
  - If "yes": Can I schedule an interview time with you now?
  - If "no": OK, thanks for your time and have a good day.

Greeting
- Hi, thanks for meeting with me. As I mentioned on the phone, this interview forms part of the work for my Master's thesis at the N.R.I. at the U of M. This thesis involves developing a framework ecotourism policy for the MB Government (through Travel Manitoba). The government is interested in this work because they recognize that the ecotourism industry is growing, and that a policy framework will assist them in promoting and guiding the development of this industry.

Purpose
- Today's interview has two basic purposes:
  (1) to identify/clarify key issues facing the development of Manitoba's ecotourism industry from the perspective of (insert stakeholder group name); and
  (2) to identify ways to address these issues.

Interview Description
- Before I begin, I would like to give you an idea about the format for the interview.
- First, I will provide you with a couple of definitions; one for "ecotourism" and one for "policy". I am providing you with these definitions so that when we are discussing the questions, we are both in agreement about these words.
- After you have read and understand the definitions, I will start to ask you some questions. In total there are (#) questions.
- After the questions are finished, you will then have an opportunity to provide me with any additional comments that may not have been covered by the questions.
- Before we begin, do you have any questions ?

Provision of Definitions
- Here are the definitions for "ecotourism" and "policy" I was talking about. *(provide the definitions to interviewee)*
- People will often attach different meanings to these words, but for the purpose of this interview I ask that you please use these definitions when answering the questions.
- *(wait for interviewee to read definitions)*
- Are these definitions clear to you ? Do you have any questions before we begin the interview ?

Question Delivery
- ask interview questions (see attached)

Closing
- Thank you very much for your time.
- After all of the interviews have been completed, I will be formulating the Draft policy framework. After that has been completed, I will be sending out a copy for you.

ECOTOURISM

Ecotourism in Manitoba entails an enlightening, nature-based or cultural travel experience, that contributes to conservation of the ecological environment, and is respectful of the economic and cultural integrity of the host communities.

This definition requires that:
- ecotourism activities be non-consumptive in nature;
- some degree of purposeful environmental or cultural education be present within the ecotourism experience; and
- the position of the host communities not only be respected, but also enhanced. That is, benefits should accrue to the host communities.

Examples of activities that are and are not classified as ecotourism are presented below. For example, swimming is not classified as ecotourism because it does not involve any sort of educational component or initiative. Alternatively, wildlife viewing is classified as an ecotourism activity because, in addition to being non-consumptive and respectful of the host community, it entails a genuine educational experience.

Designation of Ecotourism Activities

Ecotourism Activities		Not Ecotourism Activities	
wildlife viewing	backpacking	hunting	lawn-bowling
canoeing	exploring	fishing*	swimming
hiking	photography	down-hill skiing	marathon running
walking	(river rafting)	golfing	
birding	(mountain biking)	snowmobiling	
sightseeing	(kayaking)	dirt-biking	
camping		parachuting	

Notes:
*(1) Those activities denoted with a * are recognized to be **incidental consumptive activities** (i.e. not considered ecotourism, but often happening in connection with the provision of ecotourism activities)*
(2) This list is intended for guidance only and should not be interpreted as a complete classification.

POLICY
Policy is defined as "a broad framework within which more specific strategies can be formulated and implemented" (Echtner and Kirker 1995).

First, I would like to ask you about the opportunities and barriers facing the ecotourism industry in Manitoba. Specifically, I am interested in these opportunities and barriers as they relate to four different areas:

- physical/natural (including infrastructure);
- cultural/social;
- government/political; and
- economic.

From the perspective of (insert stakeholder group name):

1.0   Are there any opportunities assisting in the development of ecotourism in Manitoba, either: (1) physical/natural, (2) cultural/social, (3) government/political, or (4) economic?

[To ensure that I understand their comments, I will then summarize the opportunities they have discussed. After each opportunity has been summarized I will ask:]

    1.1   Do you have any recommendations about how to develop this opportunity?

    1.2   Who is responsible for addressing this opportunity? Who should be responsible for addressing this opportunity?

        1.2.1   What do you see the role of other stakeholder groups as being? *(list stakeholder group names -- other than the one they have just identified)*

2.0   Are there any barriers hampering the development of ecotourism in Manitoba, either: (1) physical/natural, (2) cultural/social, (3) government/political, or (4) economic? *[To ensure that I have understood their comments, I will then summarize the barriers they have discussed. After each barrier has been summarized I will ask:]*

    2.1   Do you have any recommendations about how to address this barrier?

    2.2   Who is responsible for addressing this barrier? Who should be responsible for addressing this barrier?

        2.2.1   What do you see the role of other stakeholder groups as being? *(list stakeholder group names -- other than the one they have just identified)*

3.0   Which of those opportunities and barriers you have identified *(I will summarize those opportunities and barriers the respondent has identified)* should be classified as high priority, medium priority, and low priority?

4.0   The formal questions have now been completed. Do you have any other comments you would like to make regarding Manitoba's ecotourism industry? Are there any additional issues that should be addressed in an ecotourism policy for Manitoba?

Appendix 8
Pre-Established Industry Issues

Physical Barriers	Cultural Opportunities	Government/Political Barriers (continued)
• Weather • Remoteness • Changing lake levels • Marshes & bogs • Bad snowfall • Forest fires • Land barriers within the parks	• Aboriginal artifacts/native culture • Local homecomings/ established tourism area/ festivals • Nearby historical sites • Low tourism density • Multi-lingual operator • DNR staff supportive • Good transportation facilities	• DNR Governed by a police-like force • Government has only recently started to listen to owners

Physical Barriers
- Weather
- Remoteness
- Changing lake levels
- Marshes & bogs
- Bad snowfall
- Forest fires
- Land barriers within the parks

Physical Opportunities
- Wilderness/edge of wild/ remoteness/natural landscape
- Lakes/clean lakes/private lake
- Wildlife/abundant wildlife populations
- Location (unspecified)
- Excellent for canoeing
- Turtle Mountain area
- Diverse habitats
- Forest
- Marshland
- Arctic coastline
- Tundra flora and fauna
- Natural beauty
- Clear winter sky and long nights
- Marine environment
- Natural trail system

Cultural Barriers
- Native rights/land claims/hunting practices
- Anti-hunting groups/ resistance by cottagers to improvements/ anti-development special interest groups
- People destroying natural conditions
- Wildlife branch, DNR
- Local resistance to activity
- Resistance by people unfamiliar with operations

Cultural Opportunities
- Aboriginal artifacts/native culture
- Local homecomings/ established tourism area/ festivals
- Nearby historical sites
- Low tourism density
- Multi-lingual operator
- DNR staff supportive
- Good transportation facilities

Government/Political Barriers
- Difficulty obtaining permits
- Restrictions in developing outcamps
- Difficult regulations of DNR and Parks
- ATV regulations favour large Churchill operators
- Unsurfaced roads which dissuade visitors
- Lack of fish stocking
- Poor train service
- Cutbacks to parks
- Little money for parks
- Problems with funding
- Lack of funding
- Little help for small operations
- Government airstrip abused by natives
- Native policies
- High taxation by municipality
- Pays lease but has no representation
- No tourism licensing legislation since 1990 resulting in uncontrolled free-for-all
- National Park administration unwilling to accept ecotourism

Government/Political Barriers (continued)
- DNR Governed by a police-like force
- Government has only recently started to listen to owners

Government/Political Opportunities
- Advertising/marketing
- Travel Manitoba
- Government promotion of area
- Manitoba ITT promotion
- Trade shows
- Educational programmes
- Consultant helped to establish business
- FBDB loan
- Government publications
- MLA is supportive
- Co-operation with free enterprise system

Economic Barriers
- Difficulty in obtaining loans and grants
- Leasing, lack of long-term security
- Needs more time to develop business
- People don't want to pay for services

Economic Opportunities
- Possibility of obtaining grants
- Area developing as a tourist destination
- USA market
- Agricultural boom in Europe
- Urban rat race
- Federal assistance to rural areas
- Federal park resorts assist in providing clients

Source: adapted from Weaver et al. (1995)

Appendix 9
Parks Canada Guiding Principles

(1) Ecological and Commemorative Integrity: Protecting ecological integrity and ensuring commemorative integrity take precedence in acquiring, managing, and administering heritage places and programs. In every application of policy, this guiding principle is paramount. The integrity of natural and cultural heritage is maintained by striving to ensure that management decisions affecting these special places are made on sound cultural resource management and ecosystem-based management in practice. It is recognized that these places are not islands, but are part of larger ecosystems and cultural landscapes. Therefore, decision-making must be based on an understanding of surrounding environments and their management.

(2) Leadership and Stewardship: In achieving results relating to protection and preservation of cultural and natural heritage, leadership is established by example, by demonstrating and advocating environmental and heritage ethics and practices, and by assisting and cooperating with others.

(3) New Protected Heritage Areas: The identification, selection, designation, and establishment of nationally significant natural areas and historic places are based on open, systematic, rigorous, cooperative, and knowledge-based practices.

(4) Education and Presentation: The Long-term success of efforts to commemorate, protect, and present Canada's natural and cultural heritage depends on the ability of all Canadians to understand and appreciate this heritage, and to personally adopt practices which are sensitive to heritage and the environment. This is encouraged through a variety of programs, and demonstrated leadership at the local, national and international levels.

(5) Human - Environment Relationship: people and the environment are inseparable. Protection and presentation of natural and cultural heritage tack account of the close relationship between people and the environment.

(6) Research and Science: Management decisions are based on the best available knowledge, supported by a wide range of research, including a commitment to integrated scientific monitoring.

(7) Appropriate Visitor Activities: Opportunities will be provided to visitors that enhance public understanding, appreciation, enjoyment and protection of the national heritage and which are appropriate to the purpose of each park and historic site. Essential and basic services are provided while maintaining ecological and commemorative integrity and recognizing the effects of incremental and cumulative impacts.

(8) Public Involvement: Public involvement is a cornerstone of policy, planning and management practices to help ensure sound decision-making, build public understanding, and provide opportunities for Canadians to contribute their knowledge, expertise and suggestions.

(9) Collaboration and Cooperations: Parks Canada works with a broad range of federal, provincial, territorial and municipal government agencies, the private sector, groups, individuals, and Aboriginal interests to achieve mutually compatible goals and objectives. These relationships support regional integration, partnerships, cooperative arrangements, formal agreements, and open dialogue with other interested parties, including adjacent or surrounding districts and communities.

Source: Canadian Heritage (1994)

Notes:

The remaining pages of this study detail a policy framework for the development of ecotourism in Manitoba. Specifically, the policy framework seeks to:

> *To contribute to Manitoba's economic and environmental well-being by promoting the development of an ecotourism industry that is domestically viable, internationally competitive, and sensitive to the surrounding ecological, cultural and economic environments.*

When analyzing the policy framework, it is important to recognize that the numbers assigned to the objectives and individual policies are for organizational purposes only. Assigned numbers do not reflect any degree of relative importance between the proposed objectives and policies.

It is also important to note that the policy framework as a whole was informed through both the literature review and stakeholder consultation processes. The objectives, policies, background discussion, and application recommendations contained within the framework represent an amalgamation of leading thoughts from international ecotourism experts and members of Manitoba's ecotourism stakeholder groups.

1. Sustainability

OBJECTIVE

To ensure the development of Manitoba's ecotourism industry is carried out in a manner consistent with the concept of sustainability.

Overview

To ensure the long-term viability of Manitoba's ecotourism industry, efforts must be taken to ensure that development is carried out in a manner consistent with the concept of sustainability. Implicit within this concept is the requirement that a supply-driven approach to development be adopted.

Adopting a supply-driven approach requires that ecotourism development activities be limited according to the ability of an area to deliver a sustainable tourism experience. Respecting this ability requires that ecotourism development activities remain sensitive the ecological, cultural, and economic interests of the host area (Ceballos-Lascurain 1996).

Without a respect for these interests, ecotourism development activities have the potential to destroy the very same product that they promote (Cater 1993). Alternatively, by incorporating these interests into the development process, the ecotourism industry will be allowed to develop in a form appropriate for the host area; minimizing negative impacts while maximizing both short-term and long-term economic benefits.

To achieve this objective, policies are proposed to:

- ensure that the ecological, cultural and economic concerns of host areas are integrated into the ecotourism planning and development process;

- ensure that ecotourism development activities are monitored;

- encourage the distribution of economic benefits to host communities; and

- promote the inclusion of conservation initiatives into ecotourism development activities.

Issues Identified Through Interview Process

- uncontrolled tourism can destroy a destination or resource
- need for host areas to realize economic benefits
- ecotourism industry dependent upon the very same product it promotes
- economic history and stability of host areas must be respected
- need to know about carrying capacities for ecotourism locations
- environment has value beyond its tourism value
- maintenance of ecological integrity
- ecotourism initiatives can help ensure long-term survival of natural areas
- conservation efforts offer a competitive advantage for operators

POLICY 1.1

Ecotourism activities shall be planned and developed in a manner that respects the economic integrity, and the ecological, cultural and visitor carrying capacity of the host area.

Background

To ensure conservation of the ecotourism industry's resource base and the long-term sustainability of the industry, development activities must be limited to a level that does not adversely affect the ecological, cultural, and economic interests of the host area. Setting development limits also helps to ensure that the market's desire for a 'natural' and 'uncrowded experience' can be satisfied (Ceballos-Lascurain 1996).

While ecotourism represents a promising economic development opportunity, it is unlikely that Manitoba's ecotourism industry will be able to generate the same level of economic benefits as some of the Province's more established resource-based industries (e.g. mining). In recognition of this fact, ecotourism development activities must be carried out in a manner that respects local economic interests, including the historical use of natural resources in the host area.

Ecological and cultural development limits are commonly set based around the concept of 'carrying capacity'. Carrying capacity refers to the maximum level of recreational use, in terms of visitor numbers and activities, that can be accommodated before a decline in ecological value, cultural value, or visitor experience sets in (Coccosis and Parpairis 1992). While useful for gaining insight into an area's ability to handle tourist flows, the complexity and uncertainty surrounding carrying capacity measurements restricts their usefulness in setting definitive development boundaries.

Carrying capacity measurements may be used as a guide for setting development limits, however to be effective, these limits must remain adaptable, flexible and open to reappraisal.

Intent

1. To ensure that overdevelopment of ecotourism areas does not occur.

2. To ensure that ecotourism development includes consideration of the ecological, cultural, and economic interests of the host area.

Application

- *Participate in studies that measure the 'carrying capacity' (ecological, cultural, and visitor) for different ecotourism areas. Communicate carrying capacity information across stakeholder groups.*

- *Participate in initiatives to educate operators about the concept of carrying capacity and the benefits of setting development limits.*

- *Investigate the feasibility of instituting a requirement for ecotourism operations to be licenced under the Licencing Advisory Committee (LAC) process.*

- *Facilitate the integration of carrying capacity information with current LAC and environmental assessment processes.*

- *Involve local communities in ecotourism planning efforts to ensure that ecological, cultural, and economic sensitivities are fully considered.*

- *Support the development of ecotourism models that can provide direction to present and potential operators. Models may relate to areas of: waste management, product purchasing, air emissions, energy conservation, use of non-toxic pesticides and herbicides, and water quality maintenance.*

- *Participate in promotional efforts that encourage tourists to participate in minimal impact practices.*

POLICY 1.2

Monitoring efforts shall be undertaken to ensure that ecotourism development is being carried out in a manner that is respective of the environment and people.

Background

The opportunity to capitalize on a high growth market has led many tourism jurisdictions to quickly enter into the ecotourism industry. Many of these efforts have been poorly planned, resulting in the degradation of ecotourism resource bases and declining credibility within the marketplace (Boo 1990).

Development of an effective and efficient monitoring program works to avoid these problems, improving the sustainability of an ecotourism industry and contributing to future planning and decision-making activities. Specifically, participating in monitoring activities can assist stakeholders with (Ceballos-Lascurain 1996):

- establishing cause-effect relationships between ecotourism activities and environmental impacts;
- identifying and mitigating negative ecotourism impacts;
- determining sustainable levels of use for different ecotourism areas; and
- developing strategies to maximize ecotourism benefits.

In addition to these benefits, monitoring activities enhance the 'environmental image' associated with an ecotourism product, creating a competitive advantage for ecotourism destinations and operators who participate in monitoring activities.

Intent

1. To ensure that the ecotourism industry's impact on the environment is monitored.

2. To improve the ecotourism information base for future planning and decision-making activities.

Application

- *Participate in efforts to identify specific aspects of ecotourism developments that need to be monitored. Work towards the establishment of both quantitative and qualitative indicators.*

- *Participate in baseline studies that measure current ecological and cultural settings.*

- *Participate in the development of a 'monitoring protocol' that clearly outlines the means through which stakeholder groups can contribute to research and the monitoring of ecotourism impacts. Participate in efforts to educate stakeholders about the benefits of participating in monitoring activities. Communicate and share the results of monitoring efforts among stakeholder groups.*

- *Encourage ecotourism operations to participate in sustainability audits.*

Background

Consistent with the concept of sustainability is the idea that economic benefits from ecotourism development should accrue to host communities. If the livelihoods of host communities are based on, or to so some degree dependent on the conservation of ecotourism resources, they will be able to avoid participating in less sustainable uses of those resources (Ryel and Grasse 1991).

Essentially, generating economic benefits for a community provides them with a vested interest in ensuring the sustainable use and long-term survival of the ecotourism resource area. The provision of economic benefits also helps to ensure community acceptance and support for ecotourism development initiatives, increasing the chances for business success (Boo 1990).

In some situations the delivery of economic benefits to local residents may not always be directly relevant, depending on the remoteness of an ecotourism operation and/or the immediate presence of a host community. Where host populations do surround an ecotourism area, they should ideally be involved with ecotourism development on an ownership/partnership level. In situations where this type of involvement is not feasible, economic benefits should accrue to host communities through the purchasing of local goods and services.

Intent

1. To ensure that host communities are provided with an opportunity to realize economic benefits from ecotourism development.

2. To encourage local participation in ecotourism development opportunities.

Application

- *Provide feasibility assessment support to residents wanting to develop ecotourism opportunities within the Province. Should include support for initiatives that seek to identify and/or study local ecotourism product offerings, including the history, culture, and wildlife/habitat of local areas.*

- *Where appropriate services are available, encourage operators to hire and purchase from host communities.*

- *Participate in initiatives that educate local residents about the benefits and risks associated with ecotourism development, and the service needs of ecotourism operators.*

- *Promote strategic partnership arrangements between local residents and established non-resident operators.*

- *Participate in training initiatives that increase the ecotourism skill set*

of local populations.

- *Investigate the feasibility of instituting a requirement for ecotourism licence applications to identify opportunities for local employment and other types of economic development spinoffs.*

POLICY 1.4
The incorporation of conservation efforts into ecotourism development activities shall be promoted.

Background

The most fundamental principle behind the concept of ecotourism revolves around the minimization of negative ecological impacts. To reduce negative impacts, ecotourism activities are designed to be 'non-consumptive' in nature. It must be acknowledged, however, that despite efforts to eliminate the negative impacts of ecotourism activities, some degree of ecological 'consumption' will always occur (Farrel and Runyan 1991).

The very act of walking into a 'pristine' ecosystem has the potential to trigger a variety of ecological impacts. Our ability to predict these impacts, and thus the potential to avoid them, is limited by our relatively simple understanding of ecosystem processes. Seemingly insignificant ecotourism activities have the potential to damage the ecological integrity of an entire area, threatening the development of present and potential ecotourism opportunities.

To compensate for both known and unknown negative ecological impacts, conservation initiatives that benefit the ecological environment must be undertaken. As much as possible, these initiatives should be designed to benefit the host resource area. Participating in compensatory conservation efforts will help to ensure that ecological integrity is maintained, providing for the long-term sustainability of the industry.

Intent

1. To ensure that ecotourism development contributes back to the environment upon which it is based.

2. To compensate for both known and unknown ecological impacts resulting from ecotourism activities.

Application

- *Participate in initiatives that educate operators about the benefits of participating in conservation efforts.*

- *Participate in the development and distribution of examples of realistic conservation practices that can be implemented by operators.*

- *Investigate the feasibility of instituting a requirement for operators to earmark a percentage of their revenues for conservation efforts, or simply encourage operators to do so on a voluntary basis.*

- *Investigate the feasibility of providing tax breaks to operators who participate in conservation initiatives.*
- *Investigate opportunities for visitors to contribute to conservation efforts.*

2. Business Viability

OBJECTIVE

To facilitate the development of viable ecotourism operations that are able to meet the needs and expectations of domestic and international markets.

Overview

Manitoba possesses a wealth of natural and cultural environments that have the potential to support a diversity of ecotourism activities. The mere presence of these environments is not, however, sufficient in itself to guarantee the successful development of an ecotourism industry.

The successful development of Manitoba's ecotourism industry requires the presence of skilled entrepreneurs who have the ability to turn ecotourism opportunities into viable business operations. To promote a diversified and viable ecotourism industry, efforts must be taken to support the growth and development of these entrepreneurs.

Without facilitating efforts, potentially viable ecotourism operations may be stunted by any one of the variety of challenges that face new business operations. However, given the proper support, potential entrepreneurs will be allowed to follow their ambitions; developing businesses that contribute to Manitoba's economic, environmental, and social well-being.

To achieve this objective, policies are proposed to:

- enhance the level of business skills among ecotourism operators;

- provide a greater range of financing opportunities for ecotourism operations;

- enhance training opportunities for ecotourism guides;

- ensure that ecotourism operations have access to crown lands and waters; and

- raise the quality and consistency of operator conduct.

Issues Identified Through Interview Process

- need for skilled local guides
- high rate of staff turnover
- need for basic business training among entrepreneurs
- liability insurance expenses
- availability of financing opportunities
- part-time businesses have little available resources for training
- land tenure uncertainty
- scale of operations may affect viability of business
- lack of standardized product within the industry
- quality control for guides
- high cost of environmentally sound operations

POLICY 2.1
The level of business skills among present and potential ecotourism operators shall be enhanced.

Background

In today's competitive marketplace, enthusiasm, entrepreneurial spirit, and a 'good idea' are no longer enough to guarantee the success of a business operation. To be successful in a competitive environment it is imperative that business managers/owners to develop a sound set of business management skills.

To run a successful ecotourism business, operators need to develop skills in the areas of: product development; financial management; marketing; natural resource management; planning and decision-making; and human resource management. Ecotourism operators who strive to develop these skills increase the present and future viability of their operations (Patterson 1997).

To ensure that operators remain sensitive to changing market expectations and attitudes, the development of business skills should not be viewed as a one time event. The development of these skills must be viewed as an organic process, with evaluation and learning taking place throughout the life of the business.

Intent

1. To ensure that ecotourism operators have the necessary business skills to establish and maintain an economically viable operation.

2. To maximize the chances for business success through training initiatives.

Application

- *Participate in the assessment of training needs for established and potential ecotourism operators.*

- *Participate in initiatives to educate established and potential ecotourism operators about the need for, and benefits of developing effective business skills.*

- *Facilitate the development and delivery of training programs that meet operator needs and (where applicable) international standards. Opportunity to partner with established educational programs (e.g. Manitoba Tourism Education Council). Design of programs must be sensitive to financial and temporal resources of the operators. Options for delivery include seminars, home study programs, and established educational institutions.*

POLICY 2.2

A greater range of financing options for ecotourism development initiatives shall be supported.

Background

A common barrier preventing the growth of both established and potential business operations is a lack of available financing opportunities. This barrier is especially prevalent in the tourism industry, where lending institutions have traditionally had difficulties accepting/assessing the 'soft assets' upon which tourism businesses are based (Whitehouse Consultants 1995).

Ecotourism operations are especially susceptible to financing difficulties. Given the industry's reliance upon natural and cultural environments, capital investment in 'hard assets' (e.g. accommodations) is less prevalent than with traditional tourism operations. While limited investment in 'hard assets' can help to reduce financial requirements, it also reduces the security of an investment in the eyes of lending institutions. In addition, lending institutions do not generally attach a great deal of significance or attention to small loan requests. These barriers, combined with the relatively new and undocumented potential of Manitoba's ecotourism industry, leave businesses with few private-sector financing opportunities.

With the recent elimination of the Canada-Manitoba Tourism Agreement, public sector financing opportunities for ecotourism businesses have also been limited. Public financing opportunities that do exist (e.g. Canadian Tourism Commission Product Clubs) are often too large for smaller ecotourism operators to utilize.

Intent

1. To assist ecotourism operators in dealing with economic barriers that prohibit the growth of the industry.

2. To maximize ecotourism potential by promoting and supporting financing for potential operators.

Application

- *Investigate, summarize and distribute information relating to available financing opportunities.*

- *Provide financial support for the development and marketing of ecotourism initiatives. Consider linking financial support with business training requirements.*

- *Encourage the establishment of an ecotourism venture capital fund that unites investors and borrowers.*

- *Participate in educational initiatives that reduce traditional concerns/misconceptions held by lending institutions about the tourism industry.*

- *Investigate the development of a more affordable liability insurance system for operators.*

- *Encourage cooperative approaches to problem solving to help overcome financial difficulties relating to isolation and/or size of operations.*

POLICY 2.3
Enhanced training opportunities for ecotourism guides shall be encouraged.

Background

One of the most significant travel motives held by ecotourists revolves around the desire to 'learn about natural and cultural environments' (Keszi 1997). To satisfy expectations associated with this desire, ecotourism experiences must offer travellers the opportunity to interact and learn from respected and knowledgeable guides.

Presently, Manitoba faces a shortage of qualified ecotourism guides. A shortage of qualified guides makes it difficult for operators to deliver viable and internationally competitive ecotourism products, thereby limiting the growth of Manitoba's ecotourism industry.

In concert with the principles of ecotourism and the concept of sustainability, it is preferable that ecotourism guides be residents of the host area where ecotourism activities are taking place. More importantly, however, is the requirement that ecotourism guides:

- be highly knowledgeable about the ecotourism product;
- have the ability to transfer that knowledge to others; and
- be sensitive to the expectations and attitudes of the target market.

The usage of accredited guides and/or well-known personalities can also increase the attractiveness of an ecotourism product offering .

Intent

1. To increase the availability of local, skilled ecotourism guides.

Application

- *Support the development of guide training programs that are industry-driven and work towards the development of occupational certification standards. Opportunity to link with Manitoba Tourism Education Council.*

- *Encourage the integration of guide training programs into the curricula of established training institutions.*

- *Encourage potential and established tourism guides to participate in ecotourism training programs.*

POLICY 2.4
*Efforts shall be taken to ensure that, respectful of carrying capacity considerations,
ecotourism operations have access to crown lands and waters.*

Background

Regional ecotourism industries have traditionally been based around public parks and/or other types of government/crown owned lands (Boo 1992). This trend is evident within Manitoba, with private lands representing a relatively insignificant portion of the land base used by ecotourism operations (Weaver et al. 1995). With plans for an increase in the number of protected natural areas within the Province, the importance of crown lands to Manitoba's ecotourism industry will only increase.

The ability to access crown lands and waters plays a critical role in the development of Manitoba's ecotourism industry. Without a reasonable guarantee that they will have access to these areas, operators will remain unwilling to invest their time and money in ecotourism development activities.

Consistent with the principles of ecotourism, guarantees relating to the usage of crown lands and waters must be based around relevant carrying capacity considerations (Lindberg and Hawkins 1993). In addition, access guarantees should include contingencies or requirements that revolve around 'acceptable operator behavior'.

Intent

1. To reduce the uncertainty associated with using crown lands for ecotourism development.

Application

- *Investigate the feasibility of developing a user-pay and/or option-to-buy system that provides operators with exclusive long-term use of a resource area, subject to 'appropriate conduct' conditions.*

- *Participate in initiatives that inform ecotourism operators about potential uncertainties surrounding the usage of specific lands and waters (including potential land-use limitations, mineral/forestry/hydro-electric developments, and/or Aboriginal land claims).*

- *Encourage the development of a land-allocation system that provides ecotourism operators with equal access to ecotourism resource areas.*

POLICY 2.5

The quality and consistency of operator conduct shall be raised to a level that meets international expectations and supports the long-term viability of the industry.

Background

The term 'ecotourism' is commonly used by operators to describe a variety of activities and experiences. Among 'ecotourism' businesses, a great deal of variation is also evident in the areas of service delivery, marketing approaches, and operational practices (Allcock et al. 1994).

In an effort to raise the quality and consistency of ecotourism experiences, many jurisdictions have chosen to adopt a set of ecotourism standards and/or accreditation systems. Development and adherence to these types of efforts would generate a number of benefits for Manitoba's ecotourism industry. An effective set of ecotourism standards and/or an accreditation system would (Allcock et al. 1994):

- encourage the delivery of high-quality and sustainable ecotourism products;
- enhance the domestic and international reputation of Manitoba ecotourism products;
- provide accredited ecotourism operators with a competitive marketing advantage;
- provide a measuring stick for natural resource authorities wanting to monitor the activities of ecotourism operations; and
- provide consumers with useful information for making comparative assessments of ecotourism offerings

For long-term success, it is imperative that any sort of standards and/or accreditation system be developed in conjunction with local operators, and be financially self-sufficient. Ecotourism standards based upon voluntary compliance generally appear to be the most effective in promoting a consistent delivery of products and services.

Intent

1. To ensure that operators deliver tours in a manner consistent with international market expectations.

Application

- *Support the development of industry standards and/or 'codes of practice' (for both occupational skills and physical/operational aspects) that are acceptable to both operators and the market. Opportunity to draw upon standards developed for other geographic areas. Standards should be industry-driven and developed through an extensive industry consultation process.*

- *Promote the acceptance of standards by: (1) educating operators about the benefits associated with compliance, and/or (2) making compliance with standards a requirement for receipt of operating licence.*

- *Participate in an internationally recognized ecotourism accreditation program (e.g. Green Flag International).*

3. Integrated Resource Management Planning

OBJECTIVE

To develop a strategic and integrated approach towards ecotourism development, balancing ecotourism activities with alternative resource uses.

Overview

Natural resource management is a complex undertaking, where decision-makers are faced with the challenge of interpreting and managing a multitude of interdependent ecological processes. Complicating this challenge is the variety of competing interests and pressures put forward by alternative resource use groups. 'Integrated resource management planning' represents a strategy for addressing these challenges; balancing competing interests (human and otherwise) to ensure the 'best use' of a given resource base.

Adopting a 'best use' development approach involves the harmonization of ecotourism development activities with alternative resource based industries. Ecotourism must not be viewed as a replacement for Manitoba's established industries, but as a complementary addition to Manitoba's diverse and established economic climate.

To achieve this objective, policies are proposed to:

- ensure that equal consideration and protection is afforded to ecotourism areas that provide Manitoba with a competitive advantage in the marketplace;

- minimize conflicts between ecotourism operations and other types of resource uses;

- ensure that equal consideration is afforded to ecotourism development activities in resource-based development decisions;

- ensure that ecotourism activities in protected natural areas are subject to special conditions; and

- ensure operator compliance with applicable government regulations and ecotourism standards.

Issues Identified Through Interview Process

- identification of areas with 'high ecotourism value'
- conflicts between consumptive and non-consumptive resource uses
- recognition of alternative resource based industries
- protected natural areas and crown lands support the majority of Manitoba's ecotourism operations
- opportunity for ecotourism development to assist in achieving other policy goals
- conservation efforts needed to meet market expectatons
- compliance/enforcement of existing regulations

POLICY 3.1

Natural areas that provide Manitoba with a competitive advantage in the ecotourism marketplace shall be afforded equal consideration and protection from competing forms of resource development.

Background

Essential to the development of a viable ecotourism industry is the presence of unique natural areas that have the ability to capture market attention. These areas represent a competitive advantage for ecotourism operators, providing a basis upon which to develop their businesses.

In many cases, natural areas with 'high ecotourism potential' face development pressures from competing resource-based industries. In these situations, choices must be made about the best possible use for a resource area. Unfortunately, because these choices are typically based upon historical economic data, 'ecotourism' as a development option is placed at a distinct disadvantage. Although it may have the potential to deliver superior economic returns, the economic impact and/or potential of ecotourism remains largely unproven for the large majority of resource areas.

To ensure that Manitoba's ecotourism industry has a chance to develop its potential, it is essential that areas with 'high ecotourism potential' be protected from conflicting forms of resource development. Protection strategies may take a variety of forms, however, those strategies based around cooperation and compromise have been shown to have the greatest potential for long-term success.

Intent

1. To ensure the protection of a resource base that can support the development of a competitive ecotourism industry.

Application

- *Participate in the identification of natural areas that provide Manitoba with a distinct competitive advantage in the ecotourism marketplace.*

- *Participate in educational initiatives that inform stakeholders about the need for conserving those areas best suited for ecotourism development.*

- *Support research efforts that work towards the conservation of ecotourism areas. Research into the economic impacts of ecotourism development should be emphasized.*

- *Investigate the development and use of economic instruments that can be used to fund the management and conservation of ecotourism areas.*

- *Investigate methods for securing natural areas that have high ecotourism potential yet have already been allocated for alternative resource uses (e.g. Forestry Management Licences).*

POLICY 3.2
Efforts shall be taken to minimize conflicts between ecotourism operations and other types of resource uses.

Background

An appreciation for natural areas is not limited to the ecotourism market. Natural areas are highly valued and sought after by a number of competing resource based industries, including forestry, mining, and other nature-based recreational pursuits.

With a large number of stakeholder groups interested in utilizing limited resource areas, conflict situations can quickly arise. In Manitoba, conflict over the use of resource areas appears to be preventing the efficient development of the ecotourism industry. The origins of this conflict vary, but include concerns about access to 'pristine' areas and the sustainable use of natural resources. Many concerns appear to revolve around misunderstandings about the needs and expectations of different resource use groups.

A variety of conflict resolution strategies may be employed to prevent and/or resolve stakeholder conflict. Common among all of these strategies is the role of communication in the resolution process. Communication among stakeholders is critical to understanding the sources of their conflict, and in developing options to prevent and/or resolve it.

Intent

1. To minimize conflict between ecotourism operations and competing resource uses.

Application

- *Participate in initiatives that educate resource users about the needs and expectations of other resource use groups.*

- *Promote the benefits of an integrated development approach that allows all resource user groups to benefit from regional attractions.*

- *Participate in the identification of socially equitable approaches that can be used to manage access to natural areas and associated services.*

- *Support the establishment of a negotiation/arbitration team that can facilitate discussions between competing resource use groups.*

- *Encourage stakeholder groups to come forward with concerns before conflict occurs.*

POLICY 3.3

Equal consideration shall be afforded to ecotourism development opportunities in both strategic and tactical resource-based development decisions.

Background

To ensure the long-term viability of an ecotourism industry, it is necessary that a coordinated approach to resource development be adopted. The adoption of a coordinated approach to development requires that ecotourism considerations be integrated into resource-based development decisions.

Without this integration, ecotourism opportunities are likely to be overlooked by decision-makers more familiar with alternative forms of resource development. To ensure that Manitoba's ecotourism industry develops in a coordinated manner, stakeholder groups must consider both present and potential ecotourism opportunities in their resource-based development plans.

Integrating ecotourism considerations into resource-based development plans will help to:

- identify and mitigate potential conflicts before they occur;
- ensure that development decisions reflect future market trends; and
- ensure protection of natural areas that provide Manitoba with a competitive advantage in the ecotourism marketplace.

The cumulative effect of these benefits will help to ensure that Manitoba's ecotourism industry develops in a cohesive and efficient manner.

Intent

1. To ensure that ecotourism opportunities are fairly considered in resource-based development decisions.

Application

- *Undertake initiatives to educate stakeholder groups about the potential benefits associated with ecotourism development, emphasizing the importance of incorporating ecotourism opportunities into planning and decision-making processes.*

- *Encourage regional authorities to incorporate ecotourism development strategies into their natural area development plans.*

- *Promote the development and dissemination of ecotourism information that can assist stakeholders with planning and management activities.*

- *Support efforts to include community participation in regional ecotourism planning efforts.*

POLICY 3.4

Ecotourism development within protected natural areas shall be subject to special conditions to reflect the unique status of the areas.

Background

The importance of protected natural areas (e.g. national parks and nature preserves) to the international ecotourism industry is well documented (Boo 1992). Because of their relatively undisturbed natural environments and unique ecological offerings, these areas are highly valued by ecotourists.

The Province's extensive network of protected natural areas, and the recent approval of plans to increase that network, provides Manitoba with a number of unique ecotourism development opportunities. Efforts to capitalize on those opportunities must, however, be considerate of an area's 'protected status' designation.

In general, protected areas are established to provide the public with an opportunity to access and enjoy natural environments, and to protect the ecological integrity of representative and/or ecologically significant natural areas (Canadian Heritage 1994). To ensure that ecotourism development activities do not contravene protected area mandates, efforts must be taken to establish special development restrictions for these areas.

Intent

1. To ensure that the ecological integrity and unique status of protected natural areas is maintained.

Application

- *Support the development and implementation of special ecotourism standards for protected natural areas (e.g. development standards exist for the Cape Churchill area). Standards must be designed to reflect the characteristics of each protected natural area, and to account for a variety of ecotourism activities.*

- *Participate in initiatives that educate ecotourism operators about the importance of maintaining protected natural areas.*

POLICY 3.5
Efforts shall be taken to ensure compliance with applicable government regulations and ecotourism standards.

Background

No matter how well thought out, the delivery of an ecotourism experience will always carry with it some type of negative ecological impact. To limit negative ecotourism impacts, two basic strategies are typically employed: the adoption of voluntary-based industry standards and/or the development and enforcement of stringent government regulations.

The diverse and often 'nomadic' nature of ecotourism activities makes the ecotourism industry difficult for public authorities to regulate. This factor, combined with an overall decline in available resources for enforcement activities, makes the adoption of voluntary-based industry standards an attractive strategy for limiting negative environmental impacts. However, while it represents an efficient strategy for limiting negative impacts, industry self-regulation also has its downfalls.

Within a self-regulatory system the opportunity for industry members to 'free-ride' off the efforts of others provides little guarantee that the ecotourism resource base will be adequately protected. In addition, industry self-regulation can not over-ride the statutory responsibilities of natural resource managers in areas such as safety and conservation. To ensure the efficient and long-term development of Manitoba's ecotourism industry, self-regulatory strategies must be combined with efforts to enforce existing government regulations that deal with the protection of natural resource areas.

Intent

1. To ensure that ecotourism activities are conducted within the bounds of existing regulations and standards.

Application

• *Support the establishment of a direct (toll-free) complaint line for tourists that witness 'unacceptable' operator behavior. Support the development of a penalty program for ecotourism businesses who operate in an 'unacceptable' manner.*

• *Participate in educational initiatives that educate stakeholder groups about proper operator conduct.*

• *Support the development of a 'Best Practices' handbook to be shared among stakeholder groups.*

• *Undertake educational initiatives to inform operators about existing ecotourism related regulations, and the repercussions associated with 'unacceptable' behavior.*

• *Participate in the establishment of a 'surprise' spot check program.*

4. Infrastructure

> ### OBJECTIVE
> *To facilitate the development and maintenance of tourism infrastructure that meets the needs of the market and is respectful of local ecological, cultural and economic conditions.*

Overview

Comparative to alternative forms of tourism development, the infrastructure needs of the ecotourism industry are relatively modest. A lack of infrastructure may actually represent a competitive advantage for an ecotourism area; contributing to an area's 'undeveloped' and/or 'pristine' image. In some situations, however, infrastructure development is necessary to ensure the long-term sustainability of an ecotourism industry (Andersen 1993).

The infrastructure development needs of Manitoba's ecotourism industry vary according to the types of activities offered, the surrounding ecological climate, and the availability of established infrastructure. Consistent throughout these needs is the idea that ecotourism infrastructure must be developed in the least intrusive and damaging manner possible; transportation routes must be developed within least impact corridors; and accommodations must be sensitive to surrounding landscapes and vistas. Infrastructure development activities in general must incorporate the ecological, cultural and economic interests of the host area (Ceballos-Lascurain 1996).

To achieve this objective, policies are proposed to:

- encourage upgrading and/or utilisation of existing infrastructure

before new construction activities are undertaken;

- ensure that new infrastructure development is designed in a manner that minimizes negative impacts, is complementary to the local landscape, and utilizes local materials and labor;

- ensure that infrastructure development occurs outside of protected natural areas; and

- support infrastructure that minimizes negative ecotourism impacts; assists with the delivery of educational initiatives; and helps to secure economic spin-offs.

Issues Identified Through Interview Process

- infrastructure has ability to control visitor activity
- availability of transport to ecotourism areas
- prime ecotourism sites are frequently the most sensitive sites
- availability of suitable accommodations
- opportunity to link ecotours with existing lodge facilities in rural areas
- lodging expectations of ecotourists

POLICY 4.1
Upgrading and/or utilisation of existing infrastructure shall be considered as an alternative prior to the undertaking of new construction activities.

Background

Consistent with market expectations, ecotourism involves a 'scaled down' or minimal approach to infrastructure development. To meet these expectations, and to remain consistent with the concept of ecotourism, operators should attempt to utilize existing infrastructure before new development activities are pursued.

With a well established lodging and outfitting industry, ecotourism operators in Manitoba have the potential to access a number of established remote accommodation facilities. It must be acknowledged, however, that the design and operation of existing lodge facilities may not be consistent with target market expectations and attitudes. Upgrading and/or conversion activities may be necessary to bring the operation of established lodges in line with market expectations.

Capitalizing on past development activities does not have to be limited to tourism based infrastructure. For example, ecotourism operators might consider the option of utilizing and/or transforming existing fire roads or abandoned rail lines into interpretive trails. To maximize the benefits from these types of 'conservation minded' development efforts, it is important that the target market be informed of the environmental considerations that were incorporated into the decision-making process.

Intent

1. To ensure that existing infrastructure is used to capacity before new construction activities are pursued.

Application

- *Participate in efforts to document the type and quality of infrastructure already available in ecotourism areas.*

- *Support the development and distribution of a guide that lists 'reasonable' upgrading activities that can be undertaken to bring existing lodge facilities in line with target market expectations and attitudes.*

- *Encourage ecotourism operators to use already established accommodation facilities (e.g. lodges, farm vacation facilities, bed & breakfasts).*

POLICY 4.2

In situations where new infrastructure development is needed, it shall be designed and built in a manner that minimizes negative ecological and cultural impacts, is complementary to the local landscape, and utilizes local materials and labor. Where it is physically possible, infrastructure development shall occur outside of protected natural areas.

Background

In situations where new infrastructure development is needed, it should be carried out in a manner that is consistent with the concept of ecotourism. New infrastructure development should be designed and built in a manner that minimizes negative ecological, cultural, and aesthetic impacts. To support the concept of sustainability, infrastructure development activities should also seek to enhance the economic well-being of host areas through local hiring and purchasing activities (Andersen 1993).

New infrastructure development activities must also remain sensitive to wider public concerns about the usage of protected natural areas for private interest purposes. Because these areas are publicly owned, development activities must not infringe upon public concern or usage of these areas.

To reduce public concern about ecotourism development activities, new infrastructure development should be limited to areas outside of protected natural areas. Where this is not feasible (e.g. the development of walking trails), infrastructure should be designed in a manner that minimizes ecological impacts, and benefits the 'public' as a whole (Ceballos-Lascurain 1996).

Intent

1. To ensure that new infrastructure developments are designed and built in a manner consistent with the concept of ecotourism.

2. To maintain the ecological integrity and unique status of protected natural areas.

3. To promote a harmonious relationship between host area populations, visitors, and operators with respect to multi-purpose uses of protected natural areas.

Application

- *Support efforts that help to ensure development activities are conducted in an appropriate location.*

- *Participate in educational initiatives that explain advantages of incorporating conservation initiatives into development activities. Consider: energy efficiency, waste disposal, building of roads, impacts on wildlife, changes in drainage patterns, and transportation requirements. Link with current environmental assessment requirements for infrastructure developments.*

- *Investigate the feasibility of incorporating known conservation technologies into ecotourism facilities (e.g. clivus multrum toilets).*

- *Investigate opportunities to provide financial incentives (subsidies and/or tax breaks) to operators who incorporate conservation initiatives into their infrastructure development activities.*

- *Support the development and distribution of a 'design guidelines handbook' for ecotourism developers.*

- *Encourage developers to seek out professional/technical expertise when constructing new ecotourism based infrastructure.*

- *Support efforts to ensure that infrastructure developments within protected natural areas (e.g. hiking trails and campsites) are constructed in a manner that minimize ecological impacts and benefit the 'public' interest as a whole.*

POLICY 4.3
Development of infrastructure that assists in minimizing negative ecotourism impacts, delivering educational components, and securing economic spin-offs shall be supported.

Background

Target market expectations and preferences for a 'pristine' and 'undeveloped' environment may lead one to believe that infrastructure development in ecotourism areas should be discouraged altogether. In certain situations however, infrastructure development may actually assist operators in delivering a sustainable tourism experience.

For example, the provision of carefully sited and constructed boardwalks and/or walking trails can help to 'confine' tourism impacts to certain areas. Infrastructure development can also serve to increase the social carrying capacity of a site by directing traffic flows and minimizing the perception of crowding (Allcock et al. 1994).

In addition to reducing negative impacts, infrastructure development has the ability to enhance positive ecotourism impacts. Development of visitor centres and interpretive signs can supplement educational initiatives and enhance visitor appreciation for environmental values; setting the stage for increased conservation efforts (Allcock et al. 1994). Development of an appropriate vending area might also assist operators and local populations to capture tourist expenditures.

Intent

1. To support infrastructure development that minimizes negative ecotourism impacts and maximizes positive ecotourism impacts.

2. To promote infrastructure development that supports educational and cross cultural learning experiences about the ecology, culture and history of host areas.

Application

- *Participate in the development and distribution of an educational document that provides examples of infrastructure developments that can minimize tourism impacts, facilitate educational efforts and assist in the securement of economic spin-offs.*

- *Provide financial support for infrastructure development that meets the intent of the policy (e.g. loans, tax breaks).*

- *Investigate the feasibility of upgrading transportation access to ecotourism areas (e.g. more frequent air access to Churchill).*

5. Leadership & Cooperation

OBJECTIVE
To establish an atmosphere that supports the development of leadership and cooperation within the industry.

Overview

The process of developing any new industry typically fosters an environment that is characterized by fragmentation and a duplication of efforts. While the creation of these characteristics may not be purposeful, their presence is undoubtedly destructive; decreasing the efficiency and effectiveness by which an industry develops.

Manitoba's ecotourism industry has not escaped this environment. A distinct lack of cooperation among stakeholder groups and the absence of an established leader are preventing Manitoba's ecotourism industry from maximizing its full potential. Addressing these hindrances will require stakeholders to adopt a more open and communicative approach to development.

Increased communication will allow stakeholders to identify their individual strengths and common needs. An awareness of these strengths and needs will facilitate the creation of a coordinated development strategy, that utilizes existing expertise to maximize Manitoba's ecotourism opportunities.

To achieve this objective, policies are proposed to:

- ensure that stakeholder opinion is incorporated into decisions that affect the development and operation of Manitoba's ecotourism industry;

- encourage individuals and organizations with leadership abilities to move forward with development initiatives;

- encourage the formation of ecotourism partnerships and strategic alliances among public, private and community groups; and

- provide recognition to operators who adopt and respect high level industry standards.

Issues Identified Through Interview Process

- communication/coordination/ cooperation among government departments and between levels of government
- communication/coordination/ cooperation among industry members
- need for consultation between government and stakeholder groups
- support for industry leadership
- mechanism for cross-departmental ecotourism policy
- credibility of ecotourism operations

POLICY 5.1
Stakeholder opinion shall be incorporated into decisions that affect the development and operation of Manitoba's ecotourism industry.

Background

The ecotourism industry's reliance upon publicly owned resources, coupled with target market preferences for a culturally sensitive experience, necessitate that stakeholder opinion be incorporated into ecotourism development decisions (Ziffer 1989).

The incorporation of stakeholder opinion into ecotourism development decisions should not be viewed as 'forced process'. Instead, this process should be viewed by decision-makers as an opportunity to develop a competitive advantage over decisions that do not incorporate stakeholder opinion. Incorporating stakeholder opinion into ecotourism decision-making processes increases the overall competitiveness of an ecotourism endeavour by:

- identifying and preventing conflicts among stakeholder groups;
- increasing stakeholder acceptance of development decisions; and
- enhancing the overall ecotourism experience that is offered to the market.

To realize the full value of stakeholder opinions, they must be incorporated into the very constructs that guide industry development; including the regulatory environment, industry development strategies, and ecotourism product offerings. Incorporating stakeholder opinion into these constructs requires that consultation processes be embraced by all

stakeholder groups, including: Provincial Government departments, local community governments, industry, First Nations, and environmental non-government organizations.

Intent

1. To ensure that stakeholder opinion is incorporated into decisions that affect the development and operation of Manitoba's ecotourism industry.

Application

- *Support the establishment of a multi-stakeholder advisory board, with a mandate to assist in the development and implementation of ecotourism policy and to develop a Provincial ecotourism strategy. Investigate the possibility of having advisory board power originating from Minister.*

- *Participate in initiatives that educate stakeholder groups about the value of seeking opinions from other stakeholder groups prior to ecotourism development decisions.*

- *Support the establishment of a forum that allows stakeholders to meet and exchange opinions and ideas.*

POLICY 5.2
Individuals and organizations with leadership abilities shall be identified and encouraged to move forward with ecotourism development initiatives.

Background

Critical to the development of any new industry is the emergence of a leadership figure. Leadership is needed to help overcome the multitude of growing pains that prevent new businesses from reaching their full potential. A leader creates opportunity, removes barriers, provides hope, and clears a path for others to follow.

One of the primary barriers preventing the development of Manitoba's ecotourism industry centers around an apparent lack of leadership and/or support for leadership within the Province. Without the direction that leadership provides, interested stakeholders have been left questioning their ability to enter and succeed in the ecotourism marketplace.

In ideal situations, leadership roles are filled by those who move forward based upon their own resolve. In situations where this does not occur, efforts are needed encourage those with leadership abilities to step forward. To overcome the doubt and general apprehension facing Manitoba's ecotourism industry, individuals and organizations with leadership abilities need to be identified and encouraged to step forward.

Intent

1. To establish a sense of leadership within the ecotourism industry.

Application

- *Participate in the identification of individuals and organizations with leadership potential.*

- *Investigate specific actions that can be taken to encourage leaders to move forward with development activities.*

- *Support individuals and organizations that adopt leadership roles within the ecotourism industry.*

- *Participate in the development and distribution of a 'Best Practices' book that provides examples of how individuals and organizations can step forward into leadership roles.*

- *Encourage individuals and organizations with leadership ability to work in partnership with those with less ability to ensure that leadership potential is passed on to others.*

POLICY 5.3
The formation of public/private/community partnerships and strategic alliances relating to ecotourism development shall be encouraged.

Background

A variety of barriers face those individuals and organizations involved with the development of Manitoba's ecotourism industry. Faced alone, these barriers may prove significant enough to prevent stakeholders from participating in the development the industry. If stakeholders band together, however, they effectively reduce the significance of these barriers, increasing their ability to participate in development activities (Unaaq 1995).

The formation of partnership arrangements has the potential to generate a number of benefits and/or efficiencies not found in non-cooperative situations. Specifically, the formation of partnerships:

- reduces the potential for conflict among stakeholders;
- generates synergistic benefits that improve product offerings and the ability of operators to deliver those products; and
- provides a greater number of stakeholders with the opportunity to share in economic benefits.

To maximize these types of benefits, partnership arrangements should be encouraged across stakeholder groups. Increasing the number of partnership arrangements would create a competitive advantage for Manitoba's ecotourism industry as a whole, improving the chances for its immediate and long-term success.

Intent

1. To promote the development of positive relationships among industry stakeholders.

Application

- *Participate in educational initiatives that help stakeholders understand the advantages of cooperation.*

- *Support the establishment of a forum that allows interested stakeholders to meet and exchange partnership ideas.*

- *Participate in wide consultation efforts that seek to align the interests of stakeholder groups (e.g. townhall meetings), and thus encourage the formation of partnerships.*

POLICY 5.4
Recognition shall be provided to operators who adopt and respect high level industry standards.

Background

A common problem facing ecotourism destinations world wide is the presence of business owners who misleadingly promote their operations as 'ecotourism'. Tour operators that merely adopt the label of 'ecotourism' yet do not embrace the principles it entails, damage the reputation of the ecotourism industry as a whole.

Because they reduce the credibility of the ecotourism industry, unscrupulous 'ecotourism' operators represent a legitimate threat to the viability of those operators who offer genuine ecotourism experiences. In some areas of Europe, the threat posed by unscrupulous operators is diffused by the ability of credible operators to take legal action. Unfortunately, given the relative amount of confusion surrounding the definition of ecotourism, legal action is not an option for the majority of ecotourism destinations.

With Manitoba's ecotourism industry still in the developmental stages, the threat posed by unscrupulous operators is especially dangerous. Given that legal action is not a viable option, the best strategy for countering the threat posed by unscrupulous operators is to provide preferential promotional considerations to those operators who deliver legitimate ecotourism experiences. Through this type of strategy, operators will be self-motivated to deliver quality ecotourism experiences.

Intent

1. To encourage and support ecotourism operations that act as positive role models.

Application

- *Participate in the development of an ecotourism accreditation scheme based on standards recommended in policy 2.5.*

- *Participate in initiatives to educate the consumer public about the presence of standards and accreditation systems.*

- *Investigate the possibility of developing an ecotourism logo for display by accredited operators. Need to distinguish between physical/operational accreditation and skill/occupational accreditation.*

- *Provide preferential support and promotion to operators who satisfy accreditation standards.*

6. Marketing

> ***OBJECTIVE***
> *To promote marketing initiatives that assist in establishing Manitoba as a diversified and high quality ecotourism region.*

Overview

Critical to the successful development of an ecotourism industry is the presence of a marketing system that can facilitate the delivery of quality products to potential travellers. To promote the efficient development of Manitoba's ecotourism industry, marketing initiatives must be undertaken to support the development of an effective marketing system.

Marketing initiatives must be designed to reflect the diversity of Manitoba's ecotourism product offerings, while remaining supportive of the principles behind the concept of ecotourism. In addition, initiatives must be designed to ensure that the marketing needs of ecotourism operators are addressed. When designing marketing initiatives, care must be taken to ensure that both tactical and strategic concerns are addressed; allowing for the immediate and long-term prosperity of Manitoba's ecotourism industry.

To achieve this objective, policies are proposed to:

- establish affordable and cooperative marketing partnerships;

- undertake marketing research that assists in the development of primary target markets;

- diversify promotional efforts across the Province, focusing on areas where visitor expectations can be met and where product supply and carrying capacity are in sync;

- ensure that promotional material is designed and distributed in a manner consistent with target market expectations; and

- monitor and adjust marketing efforts to meet changing market characteristics.

Issues Identified Through Interview Process

- need for marketing partnerships within the industry
- expense of buying into marketing opportunities (e.g. Canadian Tourism Commission Product Clubs)
- high cost of advertising
- need for ecotourism promotional material
- pre-mature promotional efforts of new businesses
- need for broader promotional efforts
- target market scepticism about 'green' marketing claims

POLICY 6.1

The establishment of cooperative and affordable marketing partnerships shall be promoted.

Background

Research has proven that nature-based travel operations with cooperative marketing strategies perform much better than those without them (Unaaq 1995). Unfortunately, few established marketing partnerships exist between Manitoba's ecotourism operators. One of the main barriers preventing the development of marketing partnerships among ecotourism businesses is a fear among operators that, should they share marketing resources, they will lose clients to competing interests.

The main benefit associated with cooperative marketing strategies is that they allow businesses to pool their financial and informational resources. Ecotourism businesses that participate in these types of strategies have the potential to generate more 'bang for their buck', increasing their chances for business success.

The benefits associated with cooperative arrangements are not limited to cost savings. For example, cooperative packaging arrangements can (Unaaq 1995):

- create a 'new product' that did not exist before;
- offer better value when compared to independent travel products;
- provide some level of quality assurance and security for travellers;
- increase convenience for the traveller; and
- increase the appeal of the travel experience, since the trip planning homework is done by others who presumably know the product well.

Intent

1. To assist in the development of marketing partnerships (including promotional and packaging arrangements) among ecotourism operators.

Application

- *Support the development of a Provincial ecotourism forum where interested industry members can meet to exchange ideas and establish cooperative relationships. Encourage industry members to participate in forum activities.*

- *Encourage and provide support to industry members who want to develop and/or participate in ecotourism marketing consortiums/partnerships. Opportunity to link with Canadian Tourism Commission Product-Clubs.*

- *Participate in initiatives that educate operators about the benefits of participating in marketing partnerships.*

POLICY 6.2
Marketing research that assists in the identification and development of primary target markets shall be undertaken and distributed in a practical format.

Background

Access to relevant target market information is necessary for the successful development of any type of business operation. Unfortunately, due to limited resources, small businesses and other stakeholder groups rarely participate in effective marketing research activities . To promote the successful development of an ecotourism industry, stakeholder groups must have access to both strategic and tactical target market information.

Despite the increased attention placed on the ecotourism industry over the last several years, relatively little is known about the primary target market: ecotourists. Information that has been collected refers primarily to socio-demographic characteristics (age, education, income, country of origin) (Keszi 1997). Information about the expectations, motives, desired experiences, and purchasing patterns of ecotourists is less developed.

In situations where valuable market research does exist, it is often presented in an 'academic' format, making it difficult for stakeholders to interpret. To be effective, market research findings must be presented in a more 'user friendly' format, allowing stakeholders to apply the findings to practical business situations.

Intent

1. To provide ecotourism operators with information that will assist them in identifying and developing primary target markets.

Application

- *Investigate areas where operators require the greatest marketing research assistance, and participate in research (primary and secondary) that helps to address those areas. Research should include an investigation of: market demand and distribution; market expectations and attitudes; effective promotional strategies; purchasing patterns; image perceptions, and pricing structures.*

- *Encourage and assist ecotourism operators to participate in marketing research activities specific to their businesses (e.g. the measurement of visitor satisfaction levels).*

- *Encourage the distribution and sharing of relevant market information among stakeholders.*

POLICY 6.3

Ecotourism promotional efforts shall be diversified to promote areas across the Province, focusing on areas where visitor expectations can be met and where product supply and carrying capacity are in sync. Promotional material shall be designed and distributed in a manner consistent with target market expectations.

Background

Manitoba's international ecotourism image primarily revolves around polar bear viewing activities at Churchill. Unfortunately, the ability of this area to handle additional tourist flows is limited. To ensure the long-term growth of the industry, Manitoba's ecotourism image must be expanded to reflect the variety of alternative ecotourism experiences available within the Province.

Expansion of Manitoba's ecotourism image requires that promotional efforts be diversified to promote ecotourism activities throughout the Province. Directing promotional efforts towards different activities will improve the long-term viability of Manitoba's ecotourism industry, and support the generation and distribution of economic benefits across a greater portion of the Province.

To contribute to the long-term sustainability of Manitoba's ecotourism industry, efforts must be taken to ensure that promotional efforts remain consistent with basic ecotourism principles. In support of these principles, care must be taken to ensure that promotional efforts focus on those areas that have the ability to handle additional tourist flows while delivering a high quality experience.

Intent

1. To ensure that promotional efforts reflect the diversity of products available within the Province.

2. To ensure that priority is placed on promoting those ecotourism areas that are able to meet market expectations and handle visitor impacts.

3. To ensure that promotional material is designed and distributed in a manner consistent with target market expectations.

Application

- *Participate in research to identify areas within the Province where target market expectations can be satisfied, and where product supply and carrying capacity are in sync. Focus promotional efforts on identified areas.*

- *Investigate the option of organizing promotional activities around designated 'ecotourism regions' within the Province. Opportunity to link with established bio-regions or protected-area zones in Manitoba.*

- *Support the development and distribution of pre-visit information that links visitor expectations with quality ecotourism opportunities.*

- *Encourage the development of off-season tours (i.e. secondary use of the primary facilities) to balance seasonal variations in international visitation and domestic supply. Focus on areas where maximum carrying capacity has already been reached.*

- *Investigate and promote 'environmentally friendly' methods for manufacturing and distributing promotional material. Consider using recycled materials and soy-based inks, print double-sided, and use proper eco-logos.*

POLICY 6.4
The effectiveness of ecotourism marketing efforts shall be monitored and adjusted to meet changing market characteristics.

Background

A lack of detailed information about target market characteristics has forced many ecotourism operators to employ a 'hit-and-miss' approach to marketing. In addition to obvious financial concerns, this type of strategy is not desirable because it provides little concrete information about the effectiveness of marketing efforts (Unaaq 1995).

To ensure that marketing efforts are in line with target market characteristics, and to maximize the effectiveness of both present and future marketing expenditures, monitoring activities must be undertaken. Monitoring of marketing efforts should be designed to measure a variety of factors, including the:

- effectiveness of promotional efforts;
- appropriateness of product offerings and pricing structures; and
- ability of the product delivery area to meet basic target market desires.

Ideally, the evaluation of marketing efforts should be based on a long-term strategy; too often marketing efforts are evaluated according to sales volumes over short time frames. To be properly evaluated, marketing efforts need to be given time to grow and improve over a period of years (Rita and Moutinho 1994). In addition, performance measures must be chosen to reflect target market characteristics. Conventional measures of market success, such as visitor numbers and length of stay, may not be as appropriate for ecotourism as

are measures of visitor satisfaction and quality of experience (Allcock et al. 1994).

Intent

1. To ensure that marketing efforts are in line with target market characteristics.

2. To contribute to the effectiveness of future marketing decisions.

Application

- *Participate in the establishment of marketing performance indicators appropriate for the ecotourism market. Participate in the collection of baseline data, and the monitoring of indicators.*

- *Encourage stakeholders to develop achievable and measurable targets for their marketing initiatives.*

- *Encourage the sharing of market information between stakeholders to improve the effectiveness of future marketing decisions.*

7. Aboriginal Involvement

OBJECTIVE

To enhance the opportunity for Aboriginal involvement in the development of ecotourism products.

Overview

The idea of trying to enter into the ecotourism marketplace is gaining increased attention among Aboriginal communities. The unique nature of Aboriginal culture and heritage provides Aboriginal people with an opportunity to develop ecotourism products with international appeal.

To remain consistent with the concept of ecotourism, cultural based ecotourism products must focus upon the education of travellers. Travellers must be provided with an opportunity to learn about the local beliefs, traditions, and skills of Aboriginal people in a culturally sensitive manner. Developing products that meet these requirements has the potential to generate numerous benefits for Aboriginal people, including:

- the creation of employment and business development opportunities;
- the promotion of interracial understanding;
- the conservation of local culture; and
- education of the general public about current Aboriginal lifestyles and issues of concern.

To achieve this objective, policies are proposed to:

- provide preferential consideration to Aboriginal people in the development of new ecotourism products that revolve around Aboriginal culture;

- encourage consultation with local Aboriginal people prior to the development or offering of Aboriginal products in ecotourism programs; and

- support the development of specialized training programs and ecotourism strategies for Aboriginal communities.

Issues Identified Through Interview Process

- ecotourism opportunities often located off reserve lands
- aboriginal products provide an international competitive advantage
- interest in sharing Aboriginal culture without commercializing it
- need for involvement of Aboriginal people when developing Aboriginal tourism products
- skill set of Aboriginal populations
- involvement in tourism often viewed as supplementary income
- acculturation of Aboriginal people
- opportunity to follow example of an established leader

POLICY 7.1

Preferential consideration shall be afforded to qualified Aboriginal people in matters concerning the development of new ecotourism opportunities that revolve around Aboriginal culture.

Background

For Aboriginal communities interested in developing an ecotourism industry, the greatest potential for success revolves around the development of products based on Aboriginal culture and heritage. With the ability to deliver a more authentic cultural experience, Aboriginal people hold a competitive advantage over non-Aboriginal people trying to deliver the same product.

To maximize the potential benefits associated with Aboriginal ecotourism products, it is essential that Aboriginal people be involved with development activities on either an ownership and/or a partnership level. To facilitate this level of involvement it is critical that Aboriginal people be informed about ecotourism development plans, and be provided with the 'right of first refusal' for opportunities revolving around their own culture.

Preferential consideration of Aboriginal people in this regard will help to ensure that they receive the majority of economic benefits generated by their own heritage. In addition, preferential consideration will help to ensure that Aboriginal people maintain primary control over development efforts that seek to benefit from Aboriginal culture.

Intent

1. To ensure that Aboriginal people are provided with first opportunity to develop ecotourism products revolving around their culture.

2. To encourage the formation of ecotourism partnerships between Aboriginal and non-Aboriginal people.

Application

- *Participate in the identification of ecotourism opportunities based around Aboriginal products. Communicate findings to Aboriginal communities.*

- *Investigate the potential and interest of Aboriginal communities in developing ecotourism opportunities.*

- *Investigate the feasibility of instituting a requirement for licence applications (those revolving around Aboriginal Culture) to provide evidence that Aboriginal people were provided with the 'right of first refusal' for the opportunity under consideration.*

- *Encourage the development of partnerships between Aboriginal and non-Aboriginal people interested in ecotourism development.*

POLICY 7.2

Consultation with local Aboriginal people shall be sought prior to the development or offering of Aboriginal products in ecotourism programs.

Background

Fundamental to the concept of ecotourism is the requirement that tour activities respect the heritage, customs, and traditions of host communities (Boo 1990). For non-Aboriginal operators whose ecotourism products incorporate aspects of Aboriginal culture, delivering an experience sensitive to these concerns can prove to be a delicate matter.

Apprehensions held by Aboriginal people towards ecotourism development range from general concerns about the accurate portrayal of their culture, to more specific concerns about the inappropriate usage of traditional and/or sacred lands (Walle 1993). Acknowledging and respecting these concerns requires that ecotourism operators seek the opinions of local Aboriginal people. To ensure that potential conflicts are avoided, these opinions should ideally be sought prior to the development and offering of ecotourism experiences.

In addition to preventing potential conflicts, the process of identifying and addressing the concerns of local Aboriginal people will help to establish a bond of trust between operators and local communities. This trust will enhance community support for ecotourism operations, increasing the chances for business success.

Intent

1. To ensure that ecotourism operations are not being carried out in a manner that is disrespectful of local Aboriginal culture.

2. To encourage communication between Aboriginal and non-Aboriginal people with respect to ecotourism development.

Application

- *Investigate the feasibility of developing and adopting a type of registered trademark to certify Aboriginal approval of an ecotourism product offering.*

- *Support the establishment of an ecotourism forum (e.g. Aboriginal tourism round table) that allows for meetings and discussions with local Aboriginal people.*

- *Investigate the feasibility of instituting a requirement for licence applications (those revolving around Aboriginal Culture) to show evidence that Aboriginal people were consulted in the development of an ecotourism experience.*

- *Participate in initiatives that educate non-Aboriginal operators about the benefits of consultation and partnership with local Aboriginal people.*

Background

To ensure satisfaction of target market expectations, ecotourism operators must develop a wide range of business skills. While the required skill set is essentially the same for all operators, specific training needs will vary among situations. For training programs to be effective, they must be developed in a manner that reflects these differences.

Aboriginal and non-Aboriginal people have many of the same basic training needs, however there are key differences within their cultures that require the development of training programs specific to Aboriginal people. These differences must be reflected in both the content and delivery of training programs.

Not only will specialized training programs help to remove many of the barriers preventing Aboriginal people from developing ecotourism businesses, it will help to ensure that cultural differences are truly integrated into the development of ecotourism products. This integration will enhance the overall ecotourism experience offered to the market, helping to ensure the long-term viability of the industry.

Intent

1. To ensure that interested Aboriginal communities have the training and strategic plans necessary for developing an ecotourism industry.

Application

- *Investigate areas where Aboriginal people require tourism training.*

- *Support the development and delivery of training programs to meet identified needs. Opportunity to link with established training programs.*

- *Support Aboriginal people in the development of regional and/or community based ecotourism strategies.*

- Participate in the delivery of tourism forums that support the development of a Provincial Aboriginal tourism strategy.

8. Awareness & Understanding

> ### OBJECTIVE
> *To improve the overall level of awareness and understanding regarding ecotourism development within the Province.*

Overview

Ecotourism is frequently associated with a variety of marketing terms and activities. In many instances, these terms and activities are in direct contradiction with the principles behind the concept of ecotourism (Ziffer 1989). Misunderstandings associated with these contradictions have generated a great deal of confusion among Manitoba's stakeholder groups. This confusion is not, however, limited to conceptual issues. In some instances, there appears to be confusion and a general lack of awareness about available ecotourism opportunities within the Province.

Without a consistent understanding about the meaning behind 'ecotourism' and a general awareness about Provincial ecotourism opportunities, Manitoba's ecotourism industry will continue to develop in an uncoordinated and inefficient manner. To maximize the ecological, cultural, and economic benefits associated with ecotourism, efforts must be taken to establish a clear and consistent understanding about the current state and potential of ecotourism in Manitoba.

To achieve this objective, policies are proposed to:

- increase awareness about ecotourism opportunities within the Province;

- facilitate stakeholder understanding

about the concept of ecotourism, the activities it entails, and the potential benefits and costs associated with it; and

- clarify the roles and requirements of government departments as they relate to ecotourism development activities.

Issues Identified Through Interview Process

- expectations about what ecotourism can provide to a community
- ecotourism sometimes viewed as a threat by other resource use groups
- misconception about the concept of ecotourism
- knowledge of opportunities within the province
- knowledge of permitting and licensing system
- confusion about functioning of government
- valuable knowledge about ecotourism opportunities through Parks staff

Background

Ecotourism opportunities have traditionally been developed based upon the opinions of ecotourism developers and their interpretation of market demand for those opportunities. Unfortunately, the opinions of developers are not always based upon a complete understanding of the true ecotourism potential for a given area. In some situations, a lack of information about the ecotourism potential of an area has resulted in the inappropriate use of resources and the development of non-viable operations (Boyd et al. 1994).

Within Manitoba, it appears that a lack of information about local ecotourism resources has left many viable opportunities undeveloped and/or underutilised. To facilitate the development of Manitoba's ecotourism industry, developers and operators must be made aware of potential ecotourism opportunities.

During the process of creating awareness, care must be taken to ensure that those parties interested in entering into the ecotourism marketplace are not misled. Although viable ecotourism opportunities can be identified, their successful development is dependent upon a variety of external factors. Interested parties must be educated about the complexities of the ecotourism industry, and of the requirements for its successful development.

Intent

1. To ensure that ecotourism developers are aware of available opportunities within Manitoba.

Application

* *Participate in studies that identify ecotourism development opportunities within the Province. Investigate the possibility of undertaking a GIS survey to identify potential ecotourism areas, as was done in Northern Ontario (Boyd et al. 1994). Communicate results of studies to interested parties.*

* *Encourage the development of a Provincial 'investment portfolio', consisting of viable ecotourism development opportunities.*

* *Participate in initiatives that serve to educate established lodges and outfitters about the potential for developing ecotourism products during their shoulder seasons.*

Background

Massive media attention over the last decade has turned 'ecotourism' into one of the most popular buzzwords in the tourism industry. Unfortunately, a commonly accepted understanding of the term does not exist. Misunderstanding about 'ecotourism' has generated a great deal of confusion among stakeholders involved with the development of Manitoba's ecotourism industry.

While some consistencies in understanding do exist, stakeholder groups appear to disagree on several key ecotourism issues. Misunderstanding around these issues represents a significant barrier to the efficient development of Manitoba's ecotourism industry. To overcome this barrier, efforts must be taken to establish an accurate and consistent understanding of the ecotourism industry among stakeholder groups.

When establishing this understanding, care must be taken to ensure that efforts are not overly focused on developing and/or debating an all-encompassing ecotourism definition. For industry development purposes, it is more important that stakeholder understanding revolve around the concept of ecotourism, the principles it entails, and its potential benefits and costs.

Intent

1. To ensure that all stakeholders have an accurate and consistent understanding of the ecotourism industry.

Application

- *Participate in research that identifies the educational needs of stakeholder groups regarding ecotourism development. Participate in the development and delivery of educational initiatives that address these needs. Encourage the use of participative techniques for educational initiatives (e.g. tourist involvement in research programs).*

- *Support research efforts that seek to measure the economic and cultural impacts associated with ecotourism development.*

- *Participate in educational initiatives that generate awareness among stakeholder groups about the benefits and costs associated with ecotourism.*

- *Investigate methods whereby ecotourism education can be delivered to remote communities.*

- *Encourage educational institutions to incorporate ecotourism components into their curricula.*

POLICY 8.3

The roles and requirements of government departments, as they relate to ecotourism development activities, shall be clarified and communicated across stakeholder groups.

Background

The creation of a successful ecotourism industry is a complex undertaking that requires stakeholders to communicate with each other throughout the development process. For communication efforts to be carried out in an efficient manner, it is essential that stakeholders have a clear understanding of the roles and requirements of other stakeholder groups.

Among all of the interviewed stakeholder groups, there existed a general level of confusion about the roles and requirements of those government departments involved with the ecotourism development process. The presence of this confusion has generated a great deal of frustration among stakeholder groups; frustration that appears to be hindering the development of Manitoba's ecotourism industry.

To address this concern, efforts must be taken to clarify the roles and requirements of government departments, as they relate to the development of Manitoba's ecotourism industry. To be effective, the results of this clarification process must be communicated across stakeholder groups. Because the development of an ecotourism policy has the potential to change these roles and requirements, it is important that clarification and communication efforts be viewed as an on-going process.

Intent

1. To provide stakeholder groups with a clear description of the roles and requirements of government departments.

Application

- *Support efforts to clarify the roles and requirements of government departments as they relate to the ecotourism development process.*

- *Support the development of an inter-departmental working committee to streamline the clarification process.*

IMAGE EVALUATION
TEST TARGET (QA–3)

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	3.6	2.0
1.25	4.0	1.8
	1.4	1.6

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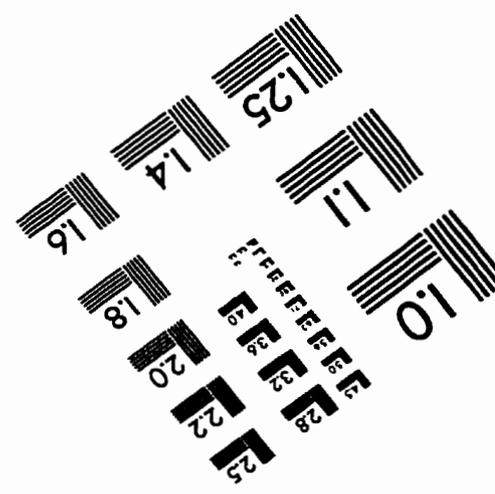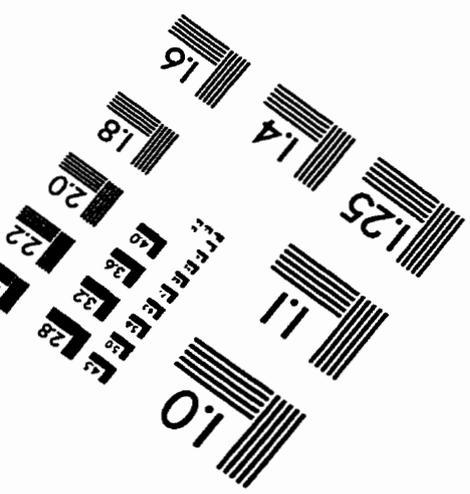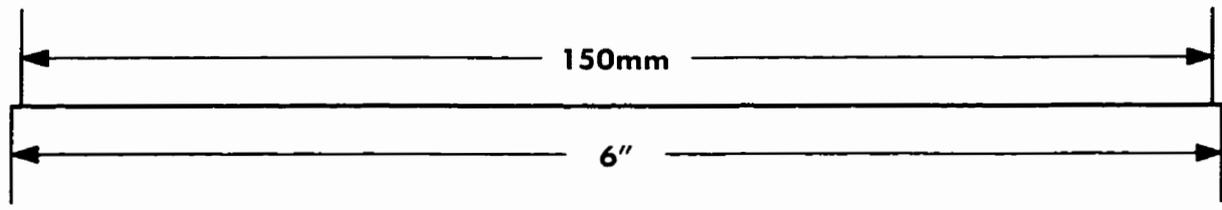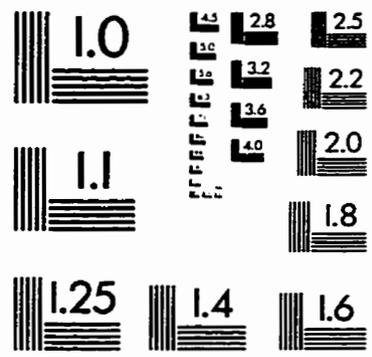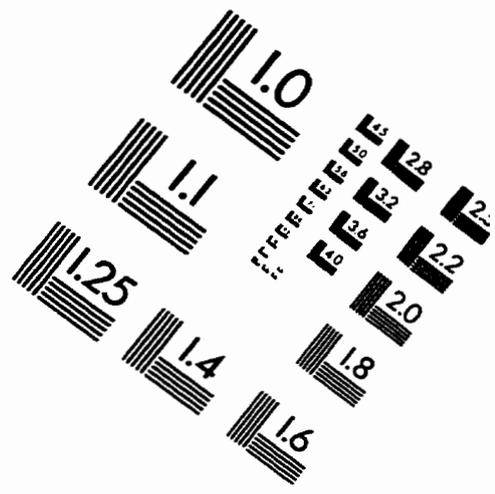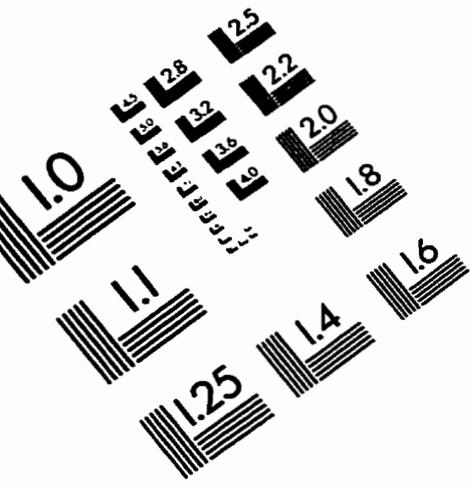
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