

FOREST BASED ECOTOURISM IN SMALL NORTHWESTERN
ONTARIO COMMUNITIES: PANACEA OR PLACEBO?

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ABSTRACT

The research question: "Under what conditions does forest-based ecotourism represent a valid opportunity for sustainable economic development for northwestern Ontario communities?" was explored using three communities—Rosspport, Armstrong, and Atikokan. They were compared to two United States centers—Bayfield, Wisconsin and Ely, Minnesota. All five communities share a history of dependence on declining resource-based industries and are adjacent to present or potential large wilderness parks. Criteria for success are presented in the form of key questions that communities or founders can use to assess their ecotourism potential. Ecotourism alone is unlikely to replace resource-based industries, but it has the potential to enhance economic diversity and stability in hinterland communities.

Key words: Tourism, ecotourism, sustainability, community forests, parks, wilderness tourism, biodiversity, hinterland economics, community economic development, nature travel, adventure travel, resource conservation, remote tourism

INTRODUCTION

Currently, ecotourism is not well developed in northwestern Ontario. If a narrow definition of the term is used, the economic benefit accruing from ecotourism is very limited, and value-added revenue is low. Some people feel it has great economic potential, while others are very sceptical about its value because of its seasonal nature and the fact that it takes place far from large population centers.

Traditionally, forest-based tourism has been founded principally on hunting and fishing. Because of the stress placed on a limited supply of fish and game resources, conflict with local recreationists, and tourist operators' concern with encroachment by forest harvesting operations, there is pressure for change. If tourism is to play a larger role in the economy, a broader range of tourism activities must be developed.

The resource-based industries in northwestern Ontario are in a state of distress, with employment levels in the forest products and mining industries continuing to drop. As a result, in many small communities people are searching for alternatives.

Northwestern Ontario has a number of parks, some being world class, which attract visitors and attention from around the world. At times the parks are not well regarded by the local community because they are seen as reducing the total economic activity in the area. Both government policies and many of the more "purist" park supporters have not tended to endorse the commercial use of parks.

A knowledge and information gap exists regarding what elements may lead to successful ecotourism in northwestern Ontario forests, and how the region's communities can benefit.

The goal of this research was to answer the question: "Under what conditions would ecotourism represent a valid, sustainable, economic development opportunity for communities in northwestern Ontario?" To provide an answer, a framework was developed that can be used by northern Ontario communities to assess their own potential and to determine what steps, if any, they may choose to take to establish ecotourism in their area.

Ecotourism will not, on its own, provide an alternative economic base for resource-dependent communities. What this research shows is that ecotourism can be an important element in diversifying the economy of communities in the region. Within communities, outstanding local leadership can match quality natural resources with emerging market forces to develop ecotourism into an economic mainstay.

METHODS

Three northwestern Ontario communities were identified for the research project: Atikokan, Armstrong, and Rossport. Each is a resource-dependent community, and each has suffered from economic swings in forests products, mining, and commercial fishing industries.

Each community is located adjacent to a world class natural resource which, in turn, has been awarded varying degrees of protection (Fig. 1). Quetico Provincial Park is a well established wilderness park near Atikokan. Wabakimi Provincial Park is a more recent, less developed park near Armstrong. Currently it is in a state of change regarding boundaries. The Rosspport Islands in Lake Superior are adjacent to Rosspport. In conjunction with the Ontario Ministry of Natural Resources, the Rosspport Islands Management Board, a citizens group, is developing a management plan for these islands. Other forms of protection, such as a national marine park, are discussed periodically. Each of these communities is working to develop its ecotourism opportunities.

As points of comparison, two United States' communities were selected. Bayfield, Wisconsin, on the south shore of Lake Superior, is near a collection of offshore islands called the Apostle Islands National Lakeshore. Ely, Minnesota, is the United States' entry point to the Boundary Waters Canoe Area, and to Quetico Provincial Park. Both of these communities have been successfully developing and broadening their ecotourism activities for several decades. As well, both share a significant natural resource with their Canadian counterparts. Bayfield and Rosspport are on opposite sides of Lake Superior, the world's largest lake, and one of the world's most beautiful areas. Ely and Atikokan share access to and use of the Boundary Waters Canoe Area and Quetico Provincial Park, the largest wilderness canoe area in North America. Partnerships between both pairs of communities could be mutually beneficial.

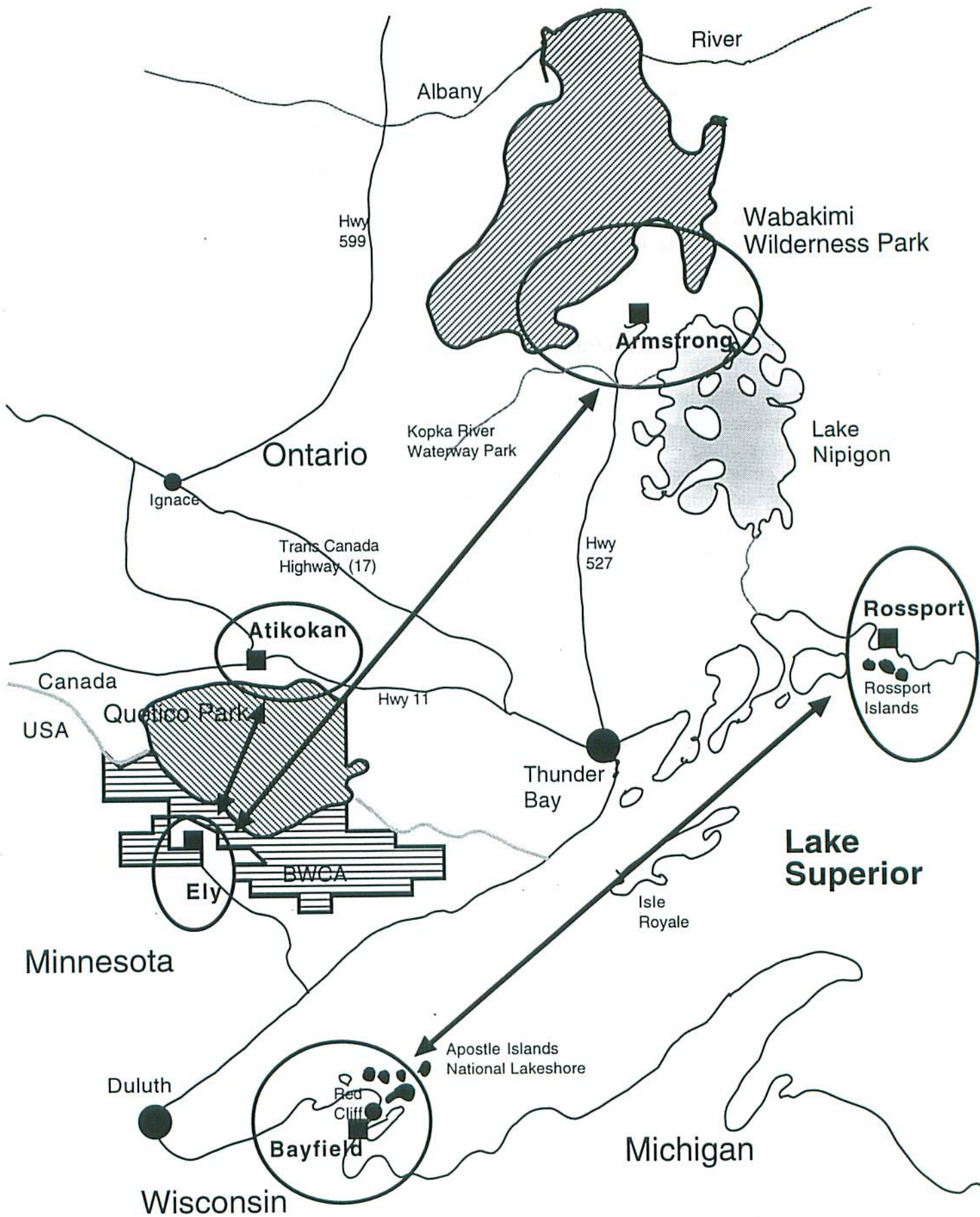


Fig. 1 NODA Ecotourism Study Areas

The research project was undertaken in the following steps between June 1993 and March 1994:

- Step 1. Preparation and literature review
- Step 2. Study of comparison communities – Ely, Minnesota and Bayfield, Wisconsin
- Step 3. Reconnaissance visits to Atikokan, Armstrong, and Rosspport
- Step 4. Key respondent interviews
- Step 5. Economic analysis of the three northwestern Ontario communities
- Step 6. Community workshops in Atikokan, Armstrong, and Rosspport
- Step 7. Interim report
- Step 8. Development of factors for community success in ecotourism
- Step 9. Socioeconomic benefit analysis
- Step 10. Community workshops in Atikokan, Armstrong, and Rosspport
- Step 11. Final report.

A key element in this research was the use of community workshops. These were organized so that local people could learn about ecotourism and have the opportunity to consider what it might mean for their community. It is clear that a community's attitude toward ecotourism is important. The aim of the workshops was to give northern communities the opportunity to identify their ecotourism potential and to consider whether or not they wished to develop it. The workshops and the associated reports prepared for the communities were part of the transfer of knowledge and tools.

WHAT IS ECOTOURISM?

A literature review suggests that clarity does not yet exist on the definition of ecotourism. Work in the three communities has revealed that ecotourism as a concept has perhaps not yet reached the main stream of the tourism industry in northwestern Ontario. Some individuals feel that ecotourism is a "buzz word" whose time will come and go. Others, who define the term broadly, suggest that it is just another word for tourism. Some of those who define the term narrowly are sceptical about its potential and are concerned that it may even infringe on the current types of tourism on which they depend. Some have never heard the expression used.

A sample of the definitions in use are:

"Responsible travel that conserves the environment and sustains the well-being of local people."

"An enlightening nature travel experience that contributes to conservation of the ecosystem while respecting the integrity of the host community."

"Generally, ecotourism is recognized to link in some way low-impact use of the resource base, environmental conservation, and sustainable economic activity."

"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."

"Small-scale tourism, accommodating low numbers of visitors, is less destructive than mass tourism, is environmentally sound and socially aware, and the main attraction is the natural environment."

To these definitions, the people contacted during this project have added:

"Making the best use of what you have."

"Bridging the use of natural resources in a way that provides for all resource users while maintaining a diverse and stable economy."

An appropriate definition of ecotourism should include aspects of tourism that:

- are based on the natural, cultural, or historic environment;
- are managed so that impact is low;
- generate economic activity and wealth that stay in the local area;
- encourage conservation; and
- foster learning or increased understanding.

POSITIVE FEATURES OF ECOTOURISM

A literature review has revealed the following list of positive features and potential drawbacks of ecotourism. It:

- does not need to involve large groups of people;
- can be carried out on a small scale and require minimal infrastructure;
- involves environmental impacts that are less severe than traditional resource-based activities;
- is a powerful tool in resource conservation and preservation;
- encourages the establishment of protected areas;
- may provide major socioeconomic benefits;
- may provide opportunities to expand the economy of an area at little cost;
- contributes to the local, regional, and national economies;
- has the potential to attract foreign visitors and currency;
- has the potential to diversify a community's economy;
- can be used as an "add-on" to typical tourist trips to extend the length of stay;
- educates travelers about the importance of the ecosystem they visit;
- involves activities that are less consumptive;
- may offer more stable employment opportunities where there are a diversity of products;
- fosters cultural understanding between hosts and guests;
- has the potential to preserve and strengthen the cultural heritage of an area; and
- requires and encourages collaboration and cooperation at the local level.

POTENTIAL DRAWBACKS OF ECOTOURISM

There are also potential drawbacks of ecotourism. These include:

- serious negative impacts if activities are not managed properly or if they are uncontrolled;
- a potential for environmental degradation;
- an unstable source of income, because tourism is subject to external factors (politics, weather, currency fluctuation);
- the potential to degrade the local culture;
- economic benefits may bypass the local community and largely benefit the tour operator alone;
- a reliance on seasonal trends;
- local people may not be given an adequate role in planning and implementing activities;
- initial development may be slow, so that it takes some time for business to grow to the point of generating a reasonable level of economic benefit;
- activities may be difficult and expensive for small entrepreneurs to market, particularly initially; and
- difficulty in establishing enough activities. One or two entrepreneurs may have difficulty surviving long enough to develop a full range of activities to attract guests.

Does ecotourism include activities such as motor boating, fishing, or flying to remote outposts? Is it only nonconsumptive, nonmotorized, guided, and educational? Can these two fairly distinct approaches to tourism coexist?

Rather than allow these different definitions to obstruct discussions with people, all sustainable, nature-based tourism activities were included in the definition of ecotourism.

GRADATIONS OF ECOTOURISM

There appear to be three gradations on the ecotourism scale:

TRADITIONAL FOREST-BASED TOURISM: features fishing, motor boating, and flying or driving to either roadless or "end of the road" locations.

HYBRID—RANGE OF TOURISM ACTIVITIES: includes a blend of many of the activities associated with both traditional and pure ecotourism. Both Bayfield and Ely are involved in hybrid tourism activities.

PURE ECOTOURISM: features the "silent (nonmotorized) sports" such as kayaking, canoeing, sailing, hiking, or biking and combines learning-oriented guided tours of historical, cultural, or natural history sites.

Currently, traditional forest-based tourism is most common in northwestern Ontario. In Quetico Provincial Park, canoeing is well established and it is growing in the Wabakimi area. It seems unlikely that many communities or entrepreneurs will be able to be supported by pure ecotourism alone. It would appear that the ideal would be to offer both traditional and "pure" ecotourism activities so as to supply a range of options for people. This will require good planning because not all types of tourism are compatible in the same time and place.

COMPARISON SCENARIOS: ELY, MINNESOTA AND BAYFIELD, WISCONSIN

In many communities in northwestern Ontario, ecotourism is an unknown concept. As a result, to consider future possibilities and what it takes to be successful, two communities that have more extensively developed ecotourism were studied.

Ely, Minnesota and Bayfield, Wisconsin were chosen because:

- they are close to each other geographically;
- they draw from similar market areas;
- there are opportunities for collaboration with Canadian centers because in two cases there is a shared resource: Lake Superior (Rosspoint and Bayfield), and the Boundary Waters Canoe Area and Quetico Provincial Park (Atikokan and Ely); and
- both have experienced a shift in their economy away from traditional resource extraction.

Visits were made to Ely and Bayfield during the tourist season, and interviews were held with people to determine what contributed to the success of the communities in ecotourism and what challenges they faced. The intention was to develop a general picture of current circumstances and conditions that would help with the identification of factors for community success in tourism and ecotourism. As well, the implications for present or potential parks was explored.

ELY, MINNESOTA

Ely is truly a community at the "end of the road" because the highway that leads to the town ends there. As a result, Ely is a destination tourism location; people don't just happen to drop in as they are passing through.

Ely is located in the Iron Range and, until 1960, a mine was located very near to the community. After the local mine closed, many people traveled to work at other mines in the area. Since 1960, the opportunity to commute to work in neighboring towns has dwindled to almost zero.

Logging was also a larger part of the area's economy in the past than it is at present. Today, there are no mills adjacent to the town. Much of the land surrounding Ely is located within the Boundary Waters Canoe Area, where no logging is allowed. Additional land is used for other tourism purposes, such as lakeside resorts and lodges. Where logging does occur people are concerned with "below cost timber sales". This term means that the revenues collected by the government as a result of timber harvesting is less than the cost of maintaining the land and having it available for logging. There is some possibility that, under emerging United States Forest Service policies, below-cost sales may be phased out completely.

The move toward a tourism economy in Ely has had supporters and detractors. People who were employed in high-paying jobs in the mines would prefer to continue mining, even though it is no longer an option. Much of the tourism development in Ely has been established by people from outside the area. People from New York, Chicago, Minneapolis, and other large centers come to the community for both business opportunities and the potential for lifestyle changes. Gradually, the old attitudes are fading and being replaced by a local culture that is both supportive and skilful when it comes to tourism.

Ely's population, which dwindled over the years as the economic base changed, dropped from 7 900 in the late 1960s to 3 900 in 1994.

Tourism in Ely is multifaceted. The Boundary Waters Canoe Area and "wilderness" are the focal points—both for people who actually experience the wilderness and for those who do not. At present there are 17 canoe outfitters and 47 resorts. As well, a number of interpretive centers and museums are involved in both interpretation and education.

SUCSESSES: KEY THINGS THAT ELY HAS DONE RIGHT

Ely has managed to become the fifth largest tourist destination in the state of Minnesota. Only Minneapolis, Duluth, Rochester, and St. Cloud are larger. This is an impressive feat given that in the United States' context, Ely is very remote.

Chamber of Commerce

The Ely Chamber of Commerce has been a key player in developing a culture of cooperation.

The chamber recognized that different elements of the business community have different interests. As a result, they organized two subcommittees—one for merchants and one for resorts and outfitters. This has helped to increase the productivity of both groups.

Tourism promotion is the chamber's main role. This activity is funded by a "bed tax"; an additional \$2.00 is charged for every night that a person stays in a resort or hotel in the area. There is some discussion of expanding the tax to include outfitters. The funds raised allow the chamber to promote the community and the area. Individual businesses promote themselves.

Turned "The End of the Road" image into an advantage

Ely has been very successful at turning what may have been seen as a disadvantage, being at the end of the road, into an advantage. The image the community projects is one of "wilderness", "northwoods", "frontier", and "remote". This gives Ely a special place in the marketplace. From the perspective of Canadians, who live farther north and where there are many towns that are more remote, this image may seem somewhat overdone. However, because the image is marketed at Americans from more southern and urban centers, it works very well.

Attracted citizens who want to live there

Over the last 40 years, the community of Ely has attracted newcomers who really desire to settle there. They are people who are attracted to the "wilderness" and to the proximity of outdoor adventures. In a number of cases these people have created jobs for themselves because they wanted to stay in Ely. This has resulted in a more diversified economy and a broader range of interesting opportunities for the tourists.

Options for tourists

Ely has a diversified tourism economy. There is a variety of accommodations, including motels, lakeside resorts, and canoe trips. As well, there are a number of activities available for people staying in the Ely area to enjoy before or after a wilderness trip, during a resort or campground stay, and on rainy days. As a result, people stay longer, learn more, and come to appreciate the area more fully.

Forethought to set up the Iron Range Rehabilitation Fund

The Iron Range is an area in northern Minnesota that was heavily dependent on iron mining. Industry and government leaders realized some time ago that there would come a time when ore reserves would run out and iron mining would no longer be the backbone of the economy. At that time a heritage fund was set up. A small levy was collected per ton of ore and invested until the time that it would be needed for economic diversification. The spending of the money is managed by the Iron Range Rehabilitation Board. The combination of a small levy on millions of tons of ore and the effect of compound interest over a long period of time have resulted in a substantial amount of money being available now to develop a tourism infrastructure and to do

marketing. Ely and other Iron Range communities are now using these funds to diversify their economies.

Extending the tourist season

As in any northern location, it is a challenge finding ways to sufficiently extend the season to provide people with a living, while still supporting the level of services that people wish to find during the peak season. Individual entrepreneurs and the community as a whole have done this in a number of ways, as described below:

Education and research

The International Wolf Center is an excellent example of a facility that draws people to an area all year round. School groups and other touring groups and individuals are able to visit the center in the off-season and to make use of other local facilities. The center also provides administrative and research jobs. Because of substantial fund raising efforts, information about Ely is being disseminated all over the country. Many people decide to visit the facility as a result of supporting the work with wolves.

Retailing of "woody" products

There are a number of stores in the community that sell expensive wilderness goods and gifts. These stores appeal to customers no matter what the weather. Some of the businesses do a substantial Christmas, as well as summer, trade.

Manufacturing

Two businesses manufacture high quality wilderness gear. One makes boots, moccasins, and mukluks; the other produces outerwear. While these goods are sold largely during the tourist season, they are manufactured for a longer period and are available year round by mail.

Mail Order

Mail ordering has been developed by a number of Ely businesses as a way to serve customers all year. This applies to the two manufacturers above, as well as to publishers, several retail outlets, and some businesses that operate solely on a mail-order basis.

Publishing

Book, magazine, and poster publishing is also done in Ely, with a number of beneficial results. "The Boundary Waters Journal", a magazine distributed throughout Canada and the United States, brings information into peoples' homes on a regular basis and reminds them of the magic of the Ely area. Also, the magazine provides a place for Ely businesses to advertise. Book publishing activities also attract attention and increase knowledge about, and esteem of, the area.

Winter tourism

Cross-country skiing and dog sledding are being developed. To date these are relatively small, but growing, activities.

Building on roots and culture

A key to creating the kind of atmosphere now present in Ely is that the community has built its theme around its history and unique qualities.

The International Wolf Center is one example. Northern Minnesota is now the only area in the lower 49 states where wolves are found in significant numbers. As a result, it is a perfect location for an interpretive facility that combines research with conservation and public education.

Some entrepreneurs specialize in dog sledding expeditions. These too are based on the mystique of the wilderness, and the idea of a journey into the past.

Building upon the mining theme is another way that the past is brought into the present, as evidenced by the Dorothy Moulter Museum. Moulter was a pioneer who, until recently, lived as a trapper in the Boundary Waters Canoe Area. She made root beer from sarsaparilla and sold it to passing canoeists.

The community college also uses the wilderness theme to attract students. In its marketing and programs, such as "wilderness ranger", the college builds on the wilderness theme and provides an opportunity to learn in and enjoy the benefits of a remote location.

Partnerships

Essential to the success of Ely as a tourism destination has been the concerted joint effort that Ely people and organizations have made. The fact that people were able to rise above interpersonal and interbusiness differences and work together to develop the tourism industry in their community is noteworthy.

SOCIOECONOMIC CHALLENGES TO ECOTOURISM IN ELY

Seasonal nature of the business

Because of the seasonal nature of the tourist industry, some of the infrastructure elements needed to support tourism are not in place. There is no commercial air service to Ely; the closest airport is in Duluth, a 3-hour drive away. Most of the motels in the town are small, and some are seasonal. A larger, full-service hotel is needed. Both of these developments have been held back by the slowness of the winter trade.

Reducing quotas in the Boundary Water Canoe Area

Control and management of the Boundary Waters Canoe Area is influenced, but not controlled, by the people and businesses of Ely. As a result, some anxiety has been expressed as to how this uncertainty could affect the business environment. The quota for the park is expressed in numbers of parties. Proposals are currently being reviewed that would reduce the group party size from nine to eight individuals. While this is a concern to some outfitters, others see it as an advantage and believe that it makes their product more exclusive, and that a higher price can be charged. This may require different marketing efforts so as to draw those people who are willing to pay a higher price. People who live at a distance from Ely will likely fly rather than drive to the town.

Old attitudes

While most people in the community see and feel the benefits of tourism, others remain who are not yet convinced, and harken back to "the good old days" when there were high paying mining jobs and less regulations regarding the use of wilderness. As a result, these people are sometimes unsupportive of developments that serve tourists. The sense that tourists are taking advantage of the fishing and outdoor opportunities that "belong" to local people has not totally disappeared. Some citizens feel that tourists are not positive additions to the community. This sceptical attitude encourages the proponents of new initiatives to plan well, because they have to convince the locals before selling to their clients.

Some animosities

As in any community, some animosities exist among businesses and among various schools of thought. However, for the most part they seem to be managed well and are not especially counter productive.

BAYFIELD, WISCONSIN

Like Ely and the Ontario communities studied, Bayfield initially had an economy based on resource extraction. The town once enjoyed a vibrant commercial fishing industry, and the remnants of it still remain.

In the late 1800s, a thriving brownstone quarrying industry also existed. Brownstone was shipped to distant markets as well as to regional destinations, and was used to build some of the majestic buildings still found in Bayfield.

Forest products industries were also economically important in the last quarter of the 1800s and the first quarter of the 1900s. Bayfield's last sawmill closed in 1924. Since then, forest products industries have played a more minor role in the area. There is some timber harvesting of the remaining forests, but there is a concern that these are "below-cost timber sales." Currently there is talk of eliminating this practice.

Because of its location on Lake Superior, tourism in Bayfield developed early. In the 1880s,

luxurious tour boats from Buffalo, Chicago, and Detroit stopped in Bayfield, but the Great Depression and World War II stalled tourism. The designation of the Apostle Islands National Lakeshore brought a new impetus for tourism beginning in 1970. Because the park is made up of many islands that can be accessed from the mainland or the lake, it does not yet have a reservation, registration, or fee collection system.

The heyday of Bayfield's economy occurred during the period from 1880 to 1910, and it is that period that Bayfield has adopted as the architectural theme or signature for the community.

The move to a tourism-based economy had its supporters and sceptics. Today, many wish that more year-round employment was available to compliment the largely summer tourist industry.

The following information gives a perspective on the community and area population.

	1980	1987
City of Bayfield	778	741
Bayfield Township	607	640
County Total	13 822	14 151

In 1990, the Bayfield County unemployment rate of 6.7 percent was higher than the state level of 4.4 percent. At the same time, the adjusted per capita income in Bayfield County \$8,386 was 66 percent of the state average of \$12,636 (U.S.\$).

State of Wisconsin economic profiles describe the Bayfield–Washburn–Ashland area as a Category A Primary Growth Center. (The scale includes Primary Growth Centers A, B, and C; Secondary Growth Areas; and Recreation Growth Areas.) This indicates that the community is viewed by senior government as having growth potential.

SUCSESSES: KEY THINGS THAT BAYFIELD HAS DONE RIGHT

Lake Superior Focal Point

Lake Superior and the Apostle Islands National Lakeshore are the focal points of much of the community's tourism thrust. There are charter boats, a ferry to Madelaine Island, kayaking independently or on guided outings, tour boats, power boating, and sailing. Because of its location, Bayfield attracts traffic bound for other destinations.

Diversified Tourism Activities

The community has worked together to develop a range of activities for tourists. These include:

Doing: sailing, kayaking, motor boating, and historical walking tours with guide books

Viewing: boat tours, Lake Superior Big Top Chataqua—a venue for plays each night for a 90-

night season;

Learning: museums, sea kayak instruction, and a kayak symposium;

Events: sailing regattas, the Inland Sea Kayak Symposium, and the Apple Festival; and

Facilities: quaint bed and breakfasts, good restaurants, and interesting shops.

Community Direction Setting

In the late 1960s and early 1970s, while planning for the future, a significant amount of community involvement developed. This was precipitated by the establishment of the Apostle Islands National Lakeshore, which at the time was somewhat controversial. Those planning efforts have been in part responsible for the healthy and orderly development of the community's tourism economy. Some citizens feel that it is time once again for the community to become involved in planning for its future.

Strong Zoning By-laws

The development of Bayfield has been guided by the municipal government, which enforces strict zoning by-laws. Most people feel that this approach has been of benefit to the community, because it helped to create and protect its character. The by-laws serve to limit the size of buildings, exclude neon signs, limit the size of signs, restrict the number of signs to one per establishment, and limit the number of lights to one per sign. While these by-laws may seem restrictive, they have resulted in a pleasant image that is much different from most communities.

Strong Chamber of Commerce

The Chamber of Commerce in Bayfield is a strong force for joint marketing, because it markets the community rather than any particular business. It also does bookings for the many small bed and breakfast establishments in the community. The marketing and referrals assistance role is crucial to these small businesses, because they are generally too small to undertake such activities themselves.

Specific Niche

Bayfield has chosen a specific niche in the tourism industry. The community does not wish to encourage visitors who may not like what they find. This effort is largely successful, but work continues to better define their niche. The nearby Red Cliff Indian Reservation will soon be building a large casino and hotel. While Bayfield is, on the one hand, pleased to welcome more tourists, there is nevertheless a concern that some tourists who will be drawn to the casino will be looking for a different type of vacation experience than can be found in Bayfield.

Airstrip an Asset

While Bayfield does not have an airport with commercial service, the airstrip on Madelaine Island is used by people who have summer homes there and by tourists with their own small airplanes.

A Walking Community

Because many people arrive in Bayfield by air or water, the community is organized in such a way that a vehicle is not needed to get around. This also helps to preserve the quaintness of the town. Accommodations, restaurants, stores, and museums are all within walking distance of the dock. Shuttle buses are available for out-of-town activities, such as the Big Top Chataqua.

Extending the Tourist Season

Extending the tourist season is a challenge in Bayfield, as in so many other communities. Efforts to date include:

The Apple Festival: Held in October, the Apple Festival is the biggest event of the year. It currently attracts approximately 30 000 people. The festival was initiated because the price that the farmers received for their apples was not high enough to warrant shipping them to southern markets.

Snowmobiling and cross-country skiing: Both of these are relatively small-scale activities at this time, but efforts are underway to expand them.

Special Weekends: In the winter, spring, and fall seasons a variety of special weekend events are held, including guided tours and talks and seminars on both natural and historical themes.

Crocus Planting: A civic group is organizing mass crocus plantings by offering crocus bulbs at an attractive price. The hope is that many people will plant them, thus creating the impression that "spring comes earlier" in Bayfield. This could be an attraction which, as well as being enjoyable to the residents, will attract tourists earlier than they might otherwise visit. This is an example of how the community works together.

Building on Roots and Culture

The Bayfield Heritage Association, an important organization within the community, includes members who are involved with tourism and those who are not. Evidently, great pride is taken in preserving the architecture of the late 1800's heydays, encouraging new construction to conform to the period style, keeping the town very neat and attractive, and encouraging tourists to appreciate and learn about the architectural traditions. Businesses in Bayfield are generally small, and reflect the style of the late 19th century. Efforts are now being made to involve native people in the tourism economy. Kayak trip guiding is one activity that has already begun.

Partnerships

Working together has been an important ingredient in Bayfield's success as a tourist destination. The local Chamber of Commerce is a key link among businesses; so also is the Bayfield Heritage Association. It is of particular interest that this association's members include those working in the tourist industry and citizens at large. The Town and County of Bayfield work together to accomplish common goals.

Ecotourism entrepreneurs have also been instrumental in creating partnerships. A company called Trek and Trail, with a shop, kayak rentals, and trips, has been responsible for creating and supporting the Inland Sea Society. The society has a Lake Superior focus, and unites people and issues from around the lake and beyond. It is also a vehicle for generating new thinking regarding the area's use and protection. Trek and Trail is also working with the Red Cliff Indian Reservation to create employment and shared ownership of tourism ventures.

SOCIOECONOMIC CHALLENGES TO ECOTOURISM IN BAYFIELD

How Is The Quality Of Life Maintained?

Maintaining a high quality of life for both tourists and local people will continue to be a challenge. Many local people do not wish to live in a town overrun by tourists. Similarly, many tourists do not want to visit an overdeveloped or overcrowded area. In fact, some boaters have already moved to less crowded spots. At the same time, the tourist industry requires a sufficient volume to survive, particularly because of the relatively short season. Some people are concerned that if development occurs too quickly, inflation in land values will result. Others are concerned that if too much money is spent on tourism infrastructure development, taxes will become too high for local people.

More Accommodation Is Needed

While there are many bed and breakfast establishments in the community, not enough accommodation is available to handle all the people who visit Bayfield. As a result, individuals who have not reserved their accommodations often stay for only a few hours.

Seasonal Unemployment

High seasonal unemployment continues, but this could be alleviated somewhat by extending the tourist season.

Factions

A number of factions have developed within the community. At times this has been detrimental to the development of tourism, but generally people pull together when required.

OVERVIEWS OF ARMSTRONG, ATIKOKAN, AND ROSSPORT

This section of the report summarizes, by community:

- "current baseline" economic conditions, and the levels and benefits of tourism in the Armstrong, Atikokan, and Rosspport areas; and
- information from two community workshops and community key respondent interviews relating to ecotourism development and its economic impact.

It is extremely difficult, given the existing data, to separate ecotourism from broader tourism activities in these communities. However, most of the activities can be categorized within a broad definition of ecotourism.

ECONOMIC AND SOCIAL BENEFITS OF TOURISM

In many instances residents of communities throughout northern Ontario and elsewhere, particularly those who have no direct involvement with visitors and tourists, hold negative views toward tourism as an economic activity. It is sometimes perceived as:

- providing only low paying and seasonal employment;
- interfering with residents' own use of what they consider to be "their" recreational resources and activities;
- costing local taxpayers substantial amounts of money for public developments, such as waterfronts, parks, and hiking trails, which benefit the visitors more than the residents;
- adding to the stress on limited natural resources;
- intruding on the overall lifestyle of smaller communities; and
- causing upward pressure on retail and service prices.

Such views are sometimes the basis for conflict between local business people (particularly those catering to visitors) and other community residents.

Some of the economic and social benefits of tourism, such as providing local jobs and incomes, can be readily quantified and expressed. Other benefits that are partially the result of tourism, such as enhanced lifestyles, improved shopping, and more recreational facilities and activities, are often not as obvious to residents.

The following are some of the social and economic benefits of tourism that were highlighted during the initial workshops:

- employment;
- local spending (visitors, tourist operators, and residents);
- community improvements;
- community activities and events;
- recreation facilities and services; and
- improved shopping and services.

ECONOMIC ANALYSES

The socioeconomic analysis is based on existing data drawn from secondary sources. The information in the community summaries was derived from:

- interviews with community leaders, local business people and tourist operators, economic development staff, and government representatives; and
- existing studies and databases provided by interviewees and the consultants' own reference materials.

For each community, information is presented that highlights the current and potential impacts of tourism related to employment, incomes, level of business activity, etc., to the extent possible using the limited information available.

It should be noted that the type, quantity, and quality of information varied significantly for each of the three communities. Very little current, reliable information exists on tourism, particularly as it relates to small communities in northern Ontario. As a result, there are limitations to the reliability and accuracy of the descriptions of current conditions, and therefore to the projections made using these estimates as a baseline. The estimates of current economic activity and future impacts resulting from ecotourism development in each of the communities should only be considered as "orders of magnitude". While the estimates are by no means precise, they do provide a good indication of the present and potential importance of ecotourism.

It is advised that each of the communities institute fairly simple, straightforward, inexpensive data collection procedures that would enable them to more accurately estimate the current level of tourism and its impact. This data would provide a sounder basis for measuring year to year changes and for projecting the likely contributions of various initiatives.

Of the three communities, only Atikokan had any relevant, recent estimates of wages, employment, and expenditures related to tourism. Estimates for Armstrong were based primarily on key respondent interviews and on the consultants' experience in other similar communities. The Armstrong estimates are for outfitters only and do not reflect activity levels in the spheres of retail, service, motels, or restaurants, because no reliable information was available. Estimates for Rosspport were based solely on key respondent interviews and the consultants' experience.

The estimates of current conditions and initial projections were presented in the first and final workshops, respectively. The revised projections presented in the following sections on each community are based upon feedback from participants.

In all three communities, workshop participants accepted the estimates of current conditions. However, the initial projections of potential changes in spending, employment, and wages (presented in the appendices) were considered by the participants to be conservative. As a result, they have been raised to reflect the participant's perceptions of the magnitude of increases that may be achieved. The consultants' comments and observations for each community highlight considerations that bear on the participants' expectations.

During the final round of workshops, participants generally agreed that projections should be based on a 10-year period. However, it should be noted that it has not been possible to adjust these straight line projections based on when activities will be implemented. Clearly, this will be a significant consideration, but it cannot be determined at this time.

In each of the communities, several potential development opportunities and initiatives were identified during key informant interviews and the initial round of workshops. During the workshops, these very long lists were partially screened by workshop participants and the most promising opportunities were highlighted for further consideration.

In preparation for the final series of workshops, matrices were developed to provide a tool for participants to more carefully examine the merits of opportunities and initiatives identified during the initial workshops. These matrices, called "Opportunity Assessment and Methods for Increasing the Level of Tourism and Related Expenditures", can be found in the appendices.

The "Opportunity Assessment" matrix was used to examine specific opportunities or projects (e.g., attractions, facilities, services) that may have an impact on the current level of tourism. The "Methods for Increasing" matrix was used to look at ways of increasing tourism (e.g., marketing, season extension, niche markets). Both were intended to provide people in the communities with basic tools for examining and assessing ideas that they felt should be pursued.

It was not possible for participants to complete all of the matrices during the final workshops. However, they provided a reasonable basis for establishing general priorities among the opportunities and initiatives identified and selected during the initial workshops. This subjective assessment of opportunities and initiatives serves as a partial basis for estimating the range of impacts that is provided for each community over a 10-year period.

Because even prefeasibility analyses were beyond the scope of this study, accurate impact projections for individual opportunities and initiatives could not be made. Rather, it has been assumed that the combinations (participants' shortlists) of development opportunities and initiatives, as a package, will have an impact that will fall somewhere between the minimum and maximum projections. Obviously, in many instances there is a critical need to more thoroughly analyze the feasibility of these opportunities and their impacts before significant time and money are allocated for further implementation.

The descriptions of current conditions, shortlists, matrices, and impact projections are a means for people to further understand and explain to others the potential for tourism development, in particular ecotourism, within their communities.

ARMSTRONG

Armstrong is located at the end of Highway 527, approximately a 3-hour drive north of Thunder Bay. In 1989, the population of Armstrong was 389. Because it is an unorganized community there is very little data available to describe its demographic and economic characteristics. The

Whitesand First Nation is located adjacent to Armstrong and its on-reserve population was estimated to be 240.

Present employers in the town include Canadian National Railways, forest product subcontractors involved in timber harvesting, government offices and services, the school board, a few retail and service businesses, and tourist operators. A major radar defense installation, once located in Armstrong, has closed. Statistics Canada census data is not available for Armstrong because it is not a municipality, and there are no other readily accessible, reliable estimates of the labor force, incomes, education levels, etc. Participants in the ecotourism workshop indicated that Armstrong suffers from chronically high levels of unemployment and a large percentage of people receive public assistance.

There is a substantial amount of tourism activity in the Armstrong area, specifically fly-in fishing base camps that service remote lodges and outposts. Much of the tourism is somewhat "invisible". Because most of the fly-in base operations are located outside the community, the visitors have little reason to visit Armstrong itself. Consequently, many residents of Armstrong do not consider tourism to be a major contributor to the local economy. Many believe that very little of the tourists' expenditures remain in the town because several of the operators are seasonal residents. The perception is that operators take most of their money out of the community at the end of each season.

There are few shopping opportunities for tourists or tourist operators in Armstrong; therefore, many needed supplies are not available locally.

People tend to ignore the fact that tourist operators provide seasonal employment for area residents. At the present time this is likely the primary economic benefit to the community. It should be noted, however, that several operators mentioned that they have trouble finding area residents who are willing to work for them. As a result, they often hire people from outside the area.

Little effort has been made to enhance Armstrong's public tourism infrastructure. This is due largely to the fact that most of the operators do not live in the community. The tourist operators have steadily upgraded and improved their own operations and facilities, but not those in the community. There appears to be a minimal level of cooperation among the tourist operators, and reluctance to increase cooperation and collaboration. Because many of them have few ties to the community, this reinforces the residents' view of the operators as outsiders who contribute little to Armstrong.

Over the years, tourism has been perceived as interfering with one of the major local economic activities, namely timber harvesting. As a consequence, there is much resistance on the part of some residents to undertake initiatives that may increase the level of tourism in the area. Tourism is perceived to have an adverse impact on timber harvesting.

No tourism studies or reliable tourism data for Armstrong and the surrounding area were found.

Apparently, some tourist operators have acquired financing through government programs to upgrade and expand their operations. While applications for this type of financial assistance may contain information relevant to this study, it is considered confidential and therefore was not available. The Ministry of Culture, Tourism and Recreation has lists of operator outpost camps, but these are also considered confidential and were not available.

WABAKIMI PARK

Wabakimi Provincial Park, a wilderness park under the jurisdiction of the Ontario Ministry of Natural Resources, was established in 1984. Unlike the parks near Atikokan and Rosspport, little data is available on activity levels within its boundaries. The Ministry tracks the number of inquiries made regarding Wabakimi Park, and this information is available, but there are no reliable indicators of usage levels. Records are kept only of written or telephone requests for information, not the number of people who actually enter the park, their length of stay, or party size.

ARMSTRONG AND AREA TOURIST ATTRACTIONS, FACILITIES, AND SERVICES

The following list of Armstrong's tourism infrastructure is based on interviews and observations made during visits to the Armstrong area.

- outfitters (estimated value of facilities \$9–10 million)
 - 10 lodges, capacity approximately 325 people
 - 35 outposts, capacity approximately 235 people
- 1 canoe outfitter (part-time)
- 16 aircraft (estimated value \$4.5 million)
 - 5 Otters (4 piston, 1 turbo)
 - 9 Beavers
 - 2 Cessnas
- 1 campground with cottages
- 3 motels
- 3 restaurants
- 5 retail businesses
- Wabakimi Provincial Park

1993 ARMSTRONG TOURISM IMPACT ESTIMATES

- direct jobs include 40 full time and 55 seasonal positions with approximately \$2,000,000 in gross wages
- visitor expenditures (for people using outposts and lodges) total \$5–6 million
- information was not available for restaurant, motel, retail, and service expenditures.

Sources: Key respondent interviews and consultant's estimates.

SOCIOECONOMIC CHALLENGES TO ECOTOURISM IN ARMSTRONG

How does an unorganized community act collectively?

Armstrong is currently an unorganized community operating under a Local Services Board. This board has a narrow range of responsibility, limited by the Municipal Act to water and sewage service, lighting, fire, recreation, and garbage collection. Therefore, how can the community become organized to develop tourism opportunities, improve its image, or develop an infrastructure to support tourism? (For example, Armstrong is now missing opportunities to use money provided by the North of Superior Tourism Association to staff a tourist information booth and install community signage.) The Armstrong Resources Development Corporation may be able to assume some parts of this role. It has recently broadened its mandate and invited a tourism industry representative to sit on the board.

What shape and form will Wabakimi Provincial Park take and what impact will it have on tourism?

At present, a multistakeholder process is under way to determine new boundaries for the park. Both the size and status of the park will have an impact on the local economy.

Some people feel that a large park will be a benefit to tourism, in that it will ensure over the long term that the forest remains intact and that logging does not threaten the wilderness atmosphere. Others are concerned that policies may not always assist tourism, and that there is a risk in establishing a large park because its policies may be too restrictive. However, on balance, most outfitters feel that a park will provide the best protection for tourism values.

Some people in the community are concerned that the park may reduce the number of logging jobs. Others consider this to be a lesser issue because most people who work in logging operations are from out of town and reside in Armstrong only temporarily.

The economic benefit of Wabakimi Provincial Park to Armstrong is unclear to most people. Many visitors who enter the park do not pass through Armstrong. Therefore, a number of respondents suggested that an access zone to the park, including a campground and interpretive center accessed from Armstrong, may be of benefit.

Relationship between tourism and the community

Many respondents commented on the distant relationship between tourism operations and the town. Neither has much appreciation for the other. Because most tourist operations are located on the highway leading into Armstrong, many visitors never visit the town itself. As a result, local people are not fully aware of the magnitude of the tourism operations and the economic benefit they bring. This condition is worsened by the fact that most tourist outfitters are seasonal residents of Armstrong, and do not fully involve themselves in local affairs. This relationship is likely partially responsible for the town missing tourism development opportunities such as those

provided by the North of Superior Tourism Association.

Distance

Armstrong, literally located at the end of the road, is a 3-hour drive from Thunder Bay and has no air service. As a result, Armstrong is a destination tourism location and it receives no drive through traffic. This means that tourists must be attracted to a specific activity. As such, Armstrong must be clear in its message to potential tourists concerning the niche it wishes to fill. A potential ecotourist needs to know in advance what activities are available, and that these activities are superior to what might be found closer to home. As discussed earlier, Ely, Minnesota is also an end-of-the-road community, but Ely uses its location to add to its sense of wilderness. That opportunity is also available to Armstrong.

ARMSTRONG SHORTLISTED OPPORTUNITIES

During the final workshop there were several areas of consensus among participants for achieving significant economic benefits.

- The presence of Wabakimi Provincial Park and accessibility to wilderness experiences are keys to diversification and economic enhancement. It is felt that the park offers significant potential to attract more visitors to the area.
- The participants believe that a significant growth potential exists for outfitter operations. This can be accomplished by more effective marketing and by undertaking initiatives to diversify the outfitters' products. In particular, a move toward less consumptive activities would be effective in increasing annual occupancy levels by promoting products and ecotourism experiences during those months when there is a substantial excess capacity.
- It is not certain that Armstrong itself will reap major benefits as a result of significantly higher levels of tourist activity. While there may be some increased local employment, for local businesses to experience an increase in business proportional to the increase in the number of visitors it will be necessary to improve Armstrong's overall image, make more effort to cater to visitors, and give visitors utilizing the park and local outfitters a reason to shop in the hamlet.

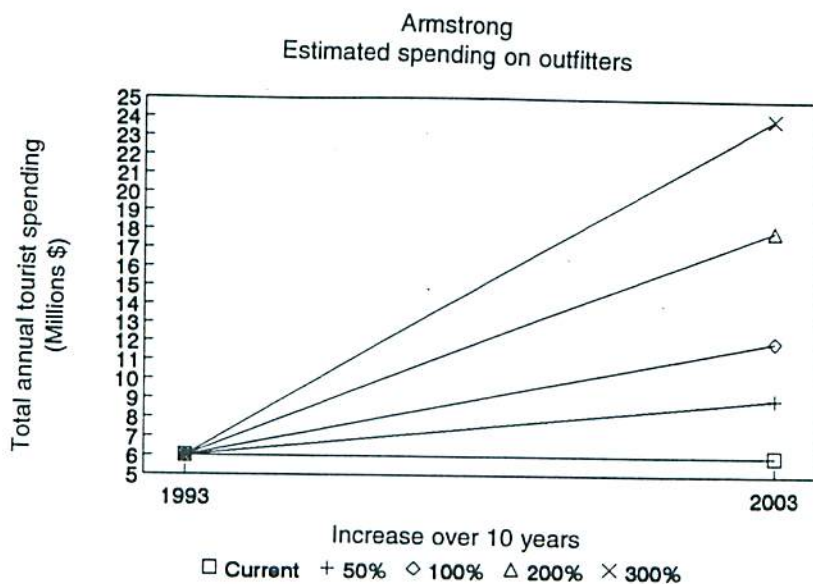
Workshop participants agreed that, in general, the level of tourism in the area could be doubled in less than 5 years and that the rate of growth was sustainable for at least the next 10 years. This would translate into an increase of 200 – 300 percent or more above current tourism levels. This was not considered to be an unrealistic target. Participants felt that efforts should focus on:

- establishing Armstrong as the gateway to Wabakimi Provincial Park;
- developing a Woodland Caribou Center;
- increasing winter activities and expeditions;

- undertaking a cultural and historical inventory;
- sponsoring native powwows;
- encouraging outfitters to offer more diversified products, combined with more effective, coordinated marketing of the area as a destination rather than promoting individual outfitters.

PROJECTIONS, COMMENTS, AND OBSERVATIONS

The participants in the Armstrong workshop would like to see a 200 – 300 percent increase in tourism in the area over the next 10 years. These are rather high targets. They may be achievable, but a concerted effort will be required to accomplish this by 2003 (Fig. 2).



The projections for Armstrong, Atikokan, and Rossport (Figs. 2 to 9) are "orders of magnitude" estimates only of both current and future conditions. Achieving them depends very much on the community being able to mobilize its resources and pursue a set of common objectives.

It should also be noted that the estimates of increases in tourist spending, wages, and employment were assumed to increase proportionally with each other. In reality, concurrent, proportional increases are unlikely to occur. For example, if existing businesses have excess capacity, they may be capable of absorbing increased visitor spending without registering immediate increases in employment and wages. However, if businesses are operating at capacity, the increase in spending from additional visitors could result in a proportional increase in employment and wages.

The relationship between increased visitor spending and employment and wage increases will, to some extent, also be a function of the degree to which particular businesses cater exclusively

or almost exclusively to visitors. Businesses for which visitor spending represents a much less significant proportion of their overall revenues, such as local restaurants and retailers, would experience less growth.

An underlying assumption in projections is that a combination of initiatives will jointly contribute to increased business. This is particularly true in cases where projected increases are significant.

The projections are intended to provide some general indications about achievable objectives that are over the medium term, not to reflect all of these and many other factors.

Participants focused on:

- greater utilization of Wabakimi Park; in particular, establishing a major gateway to the park near Armstrong; and
- dramatically increasing the utilization of fly-in and other outfitter services.

These two areas of primary focus are quite reasonable. There may be some conflicts between the development of Wabakimi Provincial Park and expanded outfitting, but these need not be mutually exclusive. Development of the park and expansion of outfitting in the park and the surrounding area face some significant, but not insurmountable, obstacles. With the right approach, major gains can be made.

Wabakimi and its gateway

Several significant factors will influence the expansion of tourism in Wabakimi Provincial Park and the economic impact this may have on Armstrong: namely,

- current planning activities and the subsequent ministerial decision will determine the eventual Wabakimi boundaries and allowable activities; and
- the amount of public sector funding available for the development and operation of Wabakimi may be insufficient. The financial constraints facing all levels of government may hamper its development and therefore its economic impact over the 10-year time frame under consideration.

Assuming that these issues are resolved favorably, the potential exists for Wabakimi to become a major destination, that could draw visitors from throughout North America and beyond. It has been suggested that because of some users' perceptions that Quetico Provincial Park is becoming overcrowded, Wabakimi could become a preferred destination.

The extent to which Wabakimi will have a direct and beneficial impact on the Armstrong area is very much dependent upon its management and operation. The greatest benefit will be derived if provisions are in place to ensure that:

- significant numbers of users pay appropriate fees;

- nonresident users are strongly encouraged, even required, to use local outfitting services and guides; and
- Wabakimi becomes an anchor and main attraction in the area with a series of complimentary but compatible activities and attractions.

With Wabakimi as a focal point, other activities and attractions that effectively utilize the area's physical attributes, history, and culture could be pursued to diversify the range of opportunities for visitors. These include the proposed Woodland Caribou Center, Native powwows, and cultural events.

Operating Wabakimi on a similar basis to Quetico Provincial Park, although not on the same scale, would nevertheless have a significant impact on Armstrong in terms of employment and potential secondary benefits to local businesses. At the present time, virtually no OMNR staff time is expended to operate the park. Expanded boundaries and operation of Wabakimi Provincial Park would create several new direct jobs in management, overall supervision, and maintenance. As well, jobs would be provided by outfitting and guiding services. While some of the management and operational jobs would be permanent and year-round, many of the other positions would be seasonal. The likely magnitude of direct job creation cannot be determined until the Wabakimi Provincial Park management plan has been established. With the high levels of unemployment and welfare dependency in Armstrong, even seasonal jobs would benefit the community.

Increased outfitting

An increase in outfitting could contribute dramatically to the level of tourism (and related economic benefits) in the Armstrong area. It is evident that most of the area's outfitters have excess capacity, except during peak fishing periods in the late spring and during the hunting season in late fall/early winter. As well, to date there has been only a token development of winter-outfitted expeditions.

Although excess capacity exists among outfitters, the extent to which greater utilization occurs is partially dependent on their willingness to devote more time, money, and effort to their businesses. There is an interest in increasing occupancy and utilization during the spring, summer, and fall seasons, but it is less evident that many of the operators are prepared to remain open all year. Principally, this may be due to owners and operators being accustomed to a very intensive effort from the spring to the fall, followed by an extended off-season during the winter months. Usually this is spent away from Armstrong. Winters are used for rest and relaxation, and for marketing treks to major centers throughout Canada and the United States.

The excess capacity usually exists during periods when neither hunting nor fishing are particularly good, or else the season is closed. The potential to increase occupancy and utilization is likely quite significant, if operators are interested. Success in this endeavor will be dependent on:

- outfitters modifying their products and services, or leasing them to others; and

identifying and catering to customers with primary interests other than hunting and fishing.

Consequently, outfitters must concentrate on promoting a wider range of activities that relate generally to the wilderness, as well as on specific cultural, historical, and physical aspects of Armstrong and the surrounding area. Because of the trend toward couples and families who seek more diverse outdoor experiences, outfitters must ensure that they can meet at least some of their requirements, and that the area as a whole provides a wider range of recreational pursuits.

It is likely that there will be a marked increase in outfitting before employment levels change noticeably. The likelihood of increased direct employment is very much dependent upon the extent to which outfitters now hire people for the full season, versus hiring occasional workers for peak periods only. If most staff are hired now for the full season, then some additional business can probably be handled without a requirement for more employees. However, if much of the staff are now hired to work during peak periods only, then expansion and diversification would most likely result in proportional increases in employment. With the possible exception of aircraft pilots, it is likely that most new jobs could be filled by appropriately trained local residents.

Figures 3 and 4 show actual wages paid, employment by outfitters in the area, and projected levels over a 10-year period.

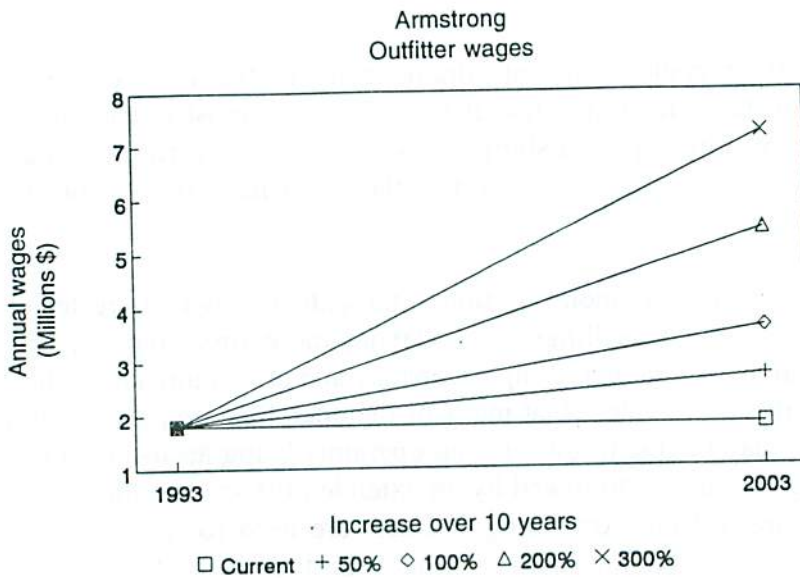
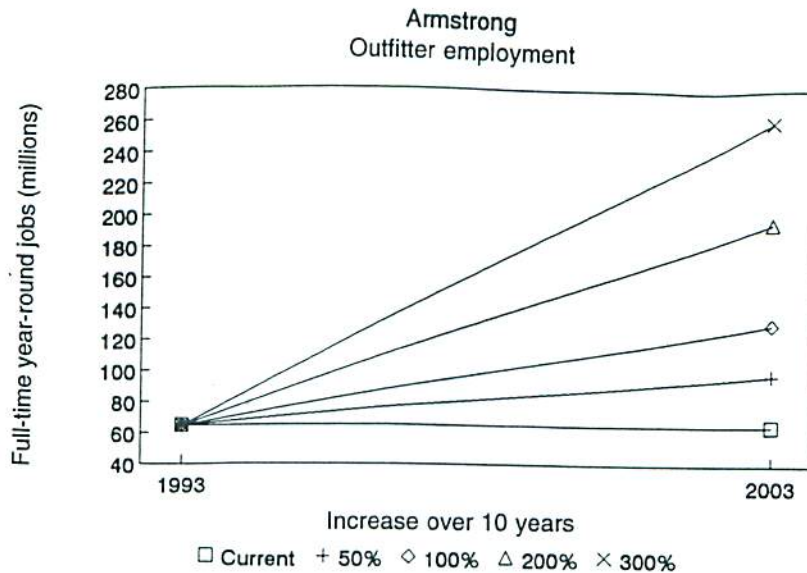


Figure 3. Wages paid by outfitters in the Armstrong area in 1993, with projections to the year 2003.



Winter expeditions

Winter expeditions provide a potential for greater utilization of the outfitters' physical plant and for more local employment. Realistically, however, it must be recognized that:

- the number of winter visitors will always be much lower relative to the number of summer visitors;
- winter operations could significantly limit the operators' ability to carry out marketing at winter sports shows; and
- significant investments may be required to winterize outpost camps and to acquire other equipment needed to provide a range of marketable winter products and services.

Although organizing and marketing winter expeditions will be a challenge, substantial increased revenues and profits may be experienced, and new employment opportunities may be provided for area residents.

Regional destination marketing

To bring about a major increase in tourism in the Armstrong area, increased emphasis will have to be placed on marketing the entire area as a destination, as opposed to marketing only individual outfitters. In time, the area could become a well-known, world-class destination, and outfitters could gain a much higher profile. This will depend upon the development and marketing of Wabakimi Provincial Park.

Woodland Caribou Center

The concept of a Woodland Caribou Center is in the early stages of conceptual development at this time. The center could range from a small research facility with minimal staff and minor potential as a tourist attraction, to a larger facility with both research and visitor capabilities.

Other activities

The Woodland Caribou Center, Native powwows, and cultural events, and a cultural/heritage inventory and center are all reasonable activities that could help to diversify Armstrong and the area's tourism. Each could contribute to achieving the destination status sought by using Wabakimi Provincial Park and wilderness outfitting as anchors. While these smaller attractions have limited direct employment they do contribute to secondary tourist spending, and therefore to employment. These types of attractions could encourage more people to spend time and money in the community.

Community improvements

To date, Armstrong has offered very little to visitors, including reasons to shop in the community. Wabakimi Provincial Park, expanded outfitting, and a series of smaller attractions would create jobs and therefore local wages that would be spent in the community. However, the full benefit of the increased levels of park and outfitter tourism will only be realized if and when the businesses and residents of Armstrong offer more activities to visitors, and when the community becomes more inviting.

Most outfitters' guests have little or no reason to visit Armstrong. When they do visit the community they do not find it to have a pleasant appearance, nor much in the way of goods and services.

Unless a major effort is made to improve the community ambience as well as its shopping and dining potential, it is possible that even a significant increase in the number of visitors to Wabakimi Provincial Park and to local outfitters may not be matched with commensurate benefits to the community. For Armstrong to achieve maximum benefits in terms of employment, wages, and profits for local businesses, a coordinated effort must be made by both public and private sectors to improve the community. Otherwise, the majority of visitors will continue to spend virtually all of their time and money elsewhere.

FACTORS FOR ARMSTRONG

During the second public meeting, people were asked to evaluate their community using an assessment tool created for that purpose; namely, "Factors for Community Success in Tourism and Ecotourism". Individuals were further asked to identify the strengths of their community and improvement opportunities. A summary of their comments follows:

A. Attitude

Participants felt that the community was aware of the need to diversify the local economy. At the same time, there was a concern that most people were unaware of the current economic benefit the community receives from tourism. There was even less of a sense of what that benefit might be in the future.

B. Community leadership and direction

Emerging leadership within the community can deal with tourism issues through the mechanism of the Armstrong Resources Development Corporation. Recently, this group has broadened its area of activity to include a diverse range of issues that affect the local economy. The need for improved planning and community partnerships was identified, as was the difficulty of planning in a community that is not a municipality.

C. Features and protection

There was agreement that Armstrong is located on the edge of a world-class wilderness resource. Being situated at the end of the road can enhance the image of unspoiled natural areas north of the community.

D. Marketing and promotion

Marketing and promotion is done almost exclusively by individual operators. The community must identify its niche, and plan together as to how best to achieve its goals. Also, ecotourists need to be better understood so that their needs can be met.

E. Tour product

Entrepreneurial spirit has been responsible for building up the tourist operations surrounding the community. This development has occurred largely independent of the community. More variety in the types of tourist packages offered and more use of guides were seen as opportunities for improvement.

F. Infrastructure

The range of motels and restaurants available in Armstrong is broadening, as is the infrastructure required as a jumping-off point for expeditions. A campground was cited as a required facility that is now missing. It could act as a point of assembly for visits to Wabakimi Provincial Park (in the same way that the Dawson Trail Campground is an important link between the public and Quetico Provincial Park). It might also attract other tourist traffic to the area.

ATIKOKAN

Atikokan is located on Highway 11, approximately 2 and one-half hours west of Thunder Bay. According to a 1991 census, it had a population of 4 047. This is a drop from the 5 803 individuals recorded in 1976. Atikokan's population loss resulted primarily from the closure of the Steep Rock and Caland mines in 1978 and 1980, respectively.

Over the years, Atikokan has been a focal point for various federal, provincial, and municipal initiatives aimed at stemming the economic decline of this resource-dependent community. Opinions vary as to the success of these initiatives. However, it should be noted that the rate of Atikokan's population loss has been less than what might have been expected given the magnitude of job losses. This suggests that, while not all initiatives have been successful, there have been a sufficient number of successes to partially reduce the rate of decline and to help stabilize the community.

The viability of numerous businesses in Atikokan is at least partially dependent upon visitor expenditures in the region. Atikokan itself is not a major tourist destination; rather it is more of a service center for visitors and tourist operators in the area. This is partially because of its proximity to major entry points to Quetico Provincial Park. As might be expected for a community of its size and location, there are motels, restaurants, service stations, and stores that serve both recreational visitors and business travelers. A few specialty tourist businesses in Atikokan are based on clients who engage in activities outside the town, mainly in and around the park. As well, a number of regional tourist operators and outfitters purchase supplies and services in Atikokan.

The Township of Atikokan and the Atikokan Economic Development Corporation are pursuing a diverse range of economic development initiatives, including several tourism related projects. Increasing the level of tourism in and around Atikokan is not supported by all residents, but there appears to be sufficient political and community-based support to suggest that a potential exists for economic diversification based partially on tourism.

ATIKOKAN AND AREA TOURIST ATTRACTIONS

Those attractions and activities that are being planned or which are under development in the Atikokan area are denoted with an asterisk (*).

- Quetico Provincial Park
- Outfitters (canoe and fly-in)
- Atikokan waterfront
- White Otter Castle*
- Steep Rock Iron Range Interpretive Centre*
- Atikokan to Minaki Waterway
- Rendezvous Trail*
- Snowmobile trail network*

- Prisoner of war camp*
- Atikokan Museum
- Quetico Boreal and Biospheric Research Centre*

This list does not include private sector initiatives that are perhaps being pursued.

ATIKOKAN AND AREA TOURIST FACILITIES AND SERVICES

- 5 Motels with 90 or more rooms
- 11 Fly-in outfitters and tourist camps, including 79 or more cabins
- 6+ Canoe outfitters (some of which are part-time)
- 10+ Restaurants
- 20+ Retail and service businesses

The above information was taken from the following sources:

- Accommodations '93 - Ontario
- Atikokan Mining Theme Attraction, 1990
- Key respondent interviews

1990 ATIKOKAN TOURISM IMPACT ESTIMATES

In 1990, tourism in the Atikokan area generated the following:

- 180 jobs, equivalent to 95 full-time/year-round (150 direct jobs and 30 indirect jobs)
- \$6,000,000 in tourism expenditures in the Atikokan area
- \$2,700,000 in wages for Atikokan residents
- \$28,400 as an average per full-time year-round job equivalent

Sources: Strategic Economic Plan for Atikokan, Profile #6 - Tourism, R.E. Michels & Associates Ltd., 1992.
The visitor market in the Rainy River District: An assessment, Atikokan Economic Development Corporation, 1992.

QUETICO PROVINCIAL PARK

Table 1 was compiled from Quetico Provincial Park registration records for 1992; the 1969 and 1979 information was extracted from previous impact studies conducted for the park.

Table 1. Quetico Park registrations.

	<u>1969</u>	<u>1979</u>	<u>1992</u>
Interior users			
Interior permits			5 158
Average number of nights			6
People per party			4.1
Interior users	20 000	NA	21 148

Interior user nights	160 000	125 333	126 887
Campground users			
Campground permits			1 646
Average number of nights			1.8
People per party			3.1
Campground users	9 400	NA	5 103
Campground user nights	22 000	14 333	15 818
Day users			
Vehicle permits			1 075
Seasonal permits			92
Total day users	5 800	NA	4 775
Total users	35 200	NA	31 026

Sources: 1992: OMNR, Quetico Park staff. Pers. comm.
 Madua, M.A., 1981: The local economic impact of Quetico Park on the Town of Atikokan, Ontario.
 Quetico Provincial Park Economic Impact Study, 1969, 1971.

Quetico Provincial Park Interior Visitors Survey

The following information, collected during a 1992 survey of park users, was derived from a 20 percent sample:

- 52 percent use outfitter services
- 55 percent are familiar with Ontario outfitters
- 16 percent use Ontario-based outfitters
- \$666 was the average party expenditure on Canadian outfitters
- \$549,636 was the approximate amount spent on Canadian outfitters

Source: 1992 Interior Visitor Survey—Quetico Provincial Park

Quetico Provincial Park Economic Impacts

The information for Table 2 was derived from an input/output economic impact analysis conducted by the OMNR using its Regional Economic Impact Model (REIM). The REIM data supplied by the ministry has been manipulated to be presented as shown. The original REIM input/output analysis is appended, along with a glossary of REIM terms. The following analysis relating to wages and salaries is based on \$2,291,055 in expenditures. This includes OMNR operating, and capital costs, and estimated visitor spending by Quetico Provincial Park users within 40 km of the park.

Table 2. Quetico Provincial Park impacts derived from the OMNR Regional Economic Impact Model: Input/output analysis, 1992 wages, and salaries.

Scope	Impacts		
	Direct	Indirect/induced	Total
Provincial			
Wages and salaries	\$1,195,702	\$1,496,159	\$269,186
Person-years of employment	32.8	44.1	76.9
Northwestern Ontario	Direct	Indirect/induced	Total
Wages and salaries	\$805,796	\$1,009,059	\$1,814,855
Person-years of employment	22.5	28.1	50.6

\$35,800 Average wages or salary per full-time, year-round equivalent job (Quetico Provincial Park driven).

\$36,400 Average wages per full-time job (Town of Atikokan, 1991 census).

Sources: Ministry of Natural Resources
Statistics Canada

Table 3 figures are a basis for rough comparison only. They were derived differently in each of the years examined. No comparison of indirect and induced employment is possible from the existing data.

Table 3. Quetico Provincial Park impact comparison.

	<u>1969</u>	<u>1979</u>	<u>1992</u>
Direct employment (person-years, local and northwestern Ontario)	15	28	22.5
Direct wages and salaries (local and northwestern Ontario)	\$100,000	N.A.	\$805,796

Sources: 1992 MNR REIM

Madua, M.A. 1981. The local economic impact of Quetico Park on the Town of Atikokan, Ontario.

Ontario Ministry of Natural Resources, 1971. Quetico Provincial Park Economic Impact Study.

SOCIOECONOMIC CHALLENGES TO ECOTOURISM IN ATIKOKAN

Economic Benefits From Quetico Provincial Park

The debate over securing increased economic benefits from Quetico Provincial Park for Atikokan has been going on for some time. The Quetico Provincial Park Economic Impact Study,

conducted in 1969, mentioned that of the total expenditures made by 20 000 interior campers in the park vicinity, 80 percent was spent in northern Minnesota, and further that 95 percent of the money spent at home and en route was spent in the United States. A summary of expenditures is shown in Table 4.

Table 4. 1969 Quetico Provincial Park user expenditures.

Total campers	20 000
Total camper days	160 000
Total spending	\$1,600,000
Broken down as follows:	
Northern Minnesota	\$1,024,000
Rest of the United States	\$304,000
Local Ontario area	\$256,000
Northwestern Ontario	\$10,000
Rest of Ontario	\$6,000

More recent comparative data do not exist, but there are indications that similar proportional levels of spending continue in northern Minnesota and northern Ontario.

In summary, the debate continues as to how more economic benefit from Quetico Provincial Park might be derived by Atikokan and Ontario. Geography is a key factor (i.e., extra travel distance for American users of the Atikokan, Ontario, area entry versus the Ely, Minnesota, entry area) along with lower United States operating costs. Can its affects be modified by regulation? Over the years a variety of suggestions have been made, including:

- locating the main entrance to the park at Batchewaung Lake, which is much closer to Atikokan (this has been resisted by government as being too expensive);
- using differential rates so that southern entry stations on the United States border would pay a higher fee than the northern entry points that are accessed from the Atikokan area;
- giving some unique privileges to Canadian outfitters, e.g., clearance to fly into certain border lakes; and
- requiring some increased percentage of American canoeists to enter the park via Canadian entry points.

The challenge has been further complicated since the passage of the North American Free Trade Agreement (NAFTA). Two articles bear on the situation:

"Article 1202: National Treatment

1. Each Party shall accord to service providers of another Party treatment no less favourable than it accords, in like circumstances, to its own service providers.
2. The treatment accorded by a Party under paragraph 1 means, with respect to a state or province, treatment no less favourable than the most favourable treatment accorded, in like

circumstances, by that state or province to service providers of the Party of which it forms a part."

"Article 1205: Local Presence

No Party may require a service provider of another Party to establish or maintain a representative office or any form of enterprise, or to be resident, in its territory as a condition for the cross-border provision of service."

In other words, the NAFTA prevents the Province of Ontario from requiring nonresidents to use Canadian outfitters. To do so would be to give less favorable treatment to the other party's service providers than to Canadians.

While this makes the challenge more difficult, it does not rule out all possibilities of obtaining additional economic benefit for Ontario. One avenue worth considering is to use the "green zone" approach that is currently in place in other parts of northern Ontario. Its intent is to increase economic benefits to Ontario by requiring nonresidents to be registered guests of an outfitter. This measure would prevent people from being fully self-outfitted or from camping on Crown land. Such individuals provide no economic benefit to Canada in spite of using the fishery resource, the land, and sometimes generating garbage problems and collection expenses.

In the case of Quetico Provincial Park, a green zone might be established where nonresidents are required to be outfitted. NAFTA would prohibit placing any restrictions on who would do the outfitting, but possibly a section of the park could be chosen where Canadian outfitting is a more likely choice than American outfitting.

Advisory committee to Quetico Provincial Park

The question of whether an advisory committee to Quetico Provincial Park might be a useful tool to assist in its management has often been raised over the years and is again under discussion. The committee would not be involved in revising the management plan, but rather in assisting with the priority-setting process for its implementation. It would be hoped that the committee's membership would include scientific, provincial, and local interests.

An increasingly important theme in resource management in Ontario is that the public wishes to be more involved in decisions that affect them. Community and economic interests in Atikokan and the Lac la Croix First Nation (located southwest of the park) would be worthwhile groups to provide members for such a committee. The positions of local groups would be considered within the context of provincial interests and scientific concerns regarding the park.

This type of committee would work toward a common understanding of issues and operational challenges.

Community involvement in ecotourism

One of the benefits of ecotourism is that some elements of it require little capital investment. This is an advantage when capital funds are difficult to raise. However, ecotourism does require support for product development and marketing.

At the second community workshop in Atikokan, discussion centered around establishing an ecotourism subcommittee to pursue these issues. A number of people present were interested in participating, and the Atikokan Futures Incentives Corporation indicated a willingness to provide logistical support.

Local attitudes regarding tourism

Like most traditional resource-based communities, residents of Atikokan have had mixed feelings about the development of a more tourism-dependent economy. As a result, the community, in the past, may not have been as welcoming to tourists as it might have been. This has changed of late and a variety of initiatives are now being pursued to increase tourism. However, there remains a concern that tourism is not going to benefit the community sufficiently and that economic development should also go in other directions.

Attracting a minimum number of ecotourists

Activities now available in Quetico Provincial Park include guided canoe trips, soft wilderness adventures to the White Otter Castle, and other similar activities. The challenge remains to attract a sufficient number of people who are interested in these specialized services, and to sustain a variety of products. A minimum level of use is required to attract more ecotourists. In short, this represents a "chicken and egg" dilemma.

Generating funds for projects

Extensive planning has been done for a number of projects, but to put them in place will in some cases require a significant capital investment. Raising these funds will be difficult, particularly because Atikokan may have problems generating a local share, due to its depressed tax base.

A SHORTLIST OF ECOTOURISM OPPORTUNITIES IN ATIKOKAN

Participants in the final workshop in Atikokan examined their options from two perspectives.

- increasing benefits to Atikokan from Quetico Provincial Park; and
- increasing their benefits to Atikokan from other tourism opportunities in the town or surrounding area.

They believed that significantly greater economic benefits could be derived from Quetico Provincial Park if:

- the number of guided and outfitted parties could be increased;
- greater use was made of under utilized portions of the park; and
- a greater percentage of park users were to choose Canadian rather than American

entry points and outfitters.

However, they supported the idea that the greatest benefit to Atikokan would be derived by a combination of initiatives that would:

- encourage more Quetico Provincial Park users to visit Atikokan; and
- encourage more people traveling through Atikokan or visiting other parts of northwestern Ontario to stop in the town.

In their view, both of these objectives could be achieved by pursuing a series of projects, most of which are under discussion or are being implemented. These include:

- the Interpretive Bear Centre;
- a fish hatchery and interpretive center;
- converting the Quetico Centre to a hotel and tourism-training school;
- providing cross-country ski and hiking trails;
- developing mining attractions;
- creating a locomotive museum and tours;
- promoting rockhounding;
- the White Otter Castle;
- providing guided outfitting;
- the Atikokan Minaki Waterway; and
- expanding the snowmobile trail network.

Based on a preliminary assessment, the following lists provide preferences and views on the priority and potential of each project:

Very high

Nonmotorized guided outfitting

High

Mining attraction
Bear Research Centre
White Otter Castle
Rock hounding and berry picking
Cross-country ski and hiking trails
Ice climbing

Medium

Locomotive museum and tours
Quetico Centre Hospitality Training

Low

Fish hatchery and interpretative center

There was consensus among participants that these opportunities were fairly consistent with their definition of ecotourism. However, there was some disagreement concerning the Atikokan to Minaki waterway and about promoting a snowmobile trail network. While these were seen by most participants as being potentially valuable in terms of increasing the level of tourism in the area, several participants felt that they did not fit within their own definition of ecotourism.

PROJECTIONS, COMMENTS, AND OBSERVATIONS

Participants in the Atikokan workshops indicated they would like to increase tourism levels by 100 percent over the next 10 years. Estimated and projected levels of spending by tourists, wages paid by tourist operators, and corresponding impacts on tourism-related employment are shown in Figures 5, 6, and 7, respectively.

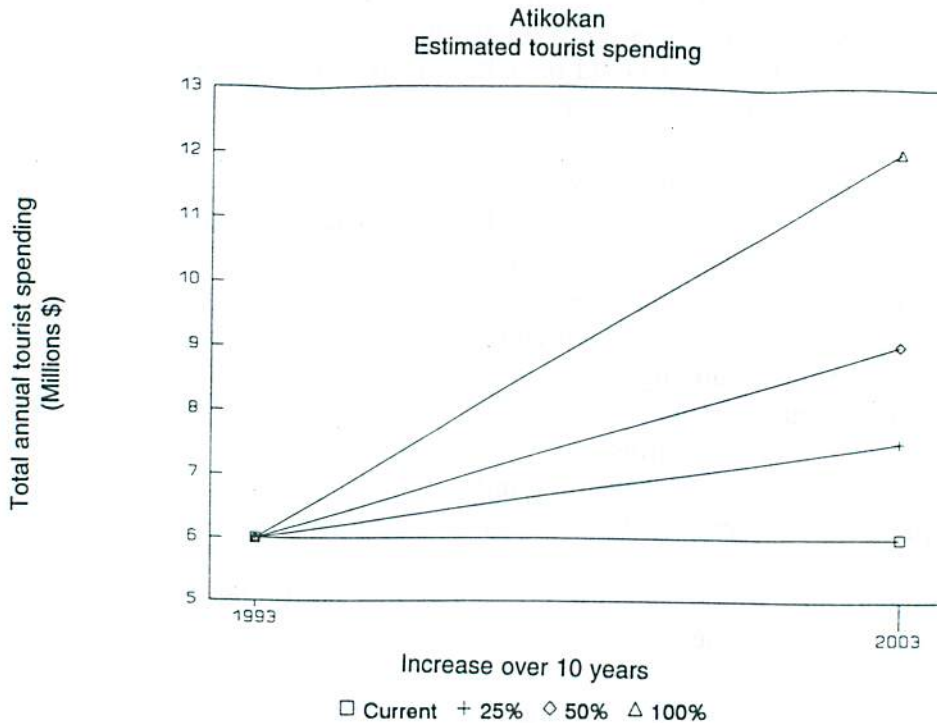


Figure 5. Estimated spending by tourists in Atikokan in 1993, with projected levels to 2003.

Quetico Provincial Park and wilderness experiences outside the park, with or without outfitter services, are the primary attraction for visitors to Atikokan and the surrounding area. Because of the distance from Atikokan to the main entry points of Quetico, the town faces numerous challenges in its ability to derive more secondary benefits from the park. To some extent, the same is true in terms of its efforts to derive secondary benefits from various outfitters and lodges in the area.

The workshop participants' focal points for improvements in ecotourism were:

- more guided outfitting;
- greater utilization of the park's existing capacity;
- diverting an increased percentage of United States based park utilization to Canadian entry points and outfitters; and
- creating more tourist attractions in and around Atikokan that would draw park users as well as a greater portion of people passing through Atikokan or visiting other parts of northwestern Ontario.

While all of these ideas have potential, none will be easy to achieve.

Quetico Provincial Park

As indicated in the data from various Quetico Provincial Park surveys and studies, total revenue generated by Ontario outfitters, guides, and other local products and services are well below those for American counterparts in Minnesota. Increasing the volume of guided outfitting will not be easy to achieve. In fact, if there is to be a major increase, it will probably be necessary for the Ontario Ministry of Natural Resources to establish green zones, in which the use of outfitters or guides is made mandatory. This will inevitably increase the cost of expeditions into the park for many parties, and it may not be acceptable to some current or potential users. Consequently, if guided outfitting becomes mandatory at certain times or in certain portions of the park, it will be necessary to access more park customers for whom the increased costs are not a concern. This may be a daunting task.

More extensive use of outfitters' services, and in particular guides, will raise seasonal employment levels. However, it appears that achieving greater utilization of existing capacity in certain areas of the park and at slow times during the summer season may not have a significant impact on direct employment.

Achieving greater use of the existing capacity is equally challenging. It is readily apparent that many American visitors to the Quetico Provincial Park Boundary Waters areas are deterred from northern (Ontario) entry points by the extra distances that must be traveled.

As well, Atikokan and Quetico Provincial Park do not offer the complimentary amenities, services, and other attractions that are available in Ely. Any hope of making Ontario entry points to this area more attractive to visitors from the United States must be based at least partially on improvements to complimentary services and other attractions. While some improvements can be achieved, providing these amenities may not be possible unless there is a likelihood of significantly larger numbers of people coming to the area.

Other opportunities

Improvements to White Otter Castle, developing the Interpretive Bear Centre, and other attractions can add to the diversity of tourism activities offered. These could also increase the likelihood of drawing to Atikokan more Quetico Provincial Park visitors, highway travelers, and visitors to other areas of the northwest. In most cases, these types of attractions will not be the primary reasons for individuals to come to the area. However, they can be effective in drawing people already in the vicinity, and provide encouragement for visitors to extend their stay.

If implemented, these attractions will likely create some new seasonal employment. Initial increases in the overall levels of tourist visits to Atikokan are not likely to have much effect on current employment levels in tourism, hospitality, or retail businesses. Many existing businesses should be able to generate higher revenue levels without increasing employment and payroll

costs. At present, it is uncertain as to how much larger the increase would have to be before new jobs would be created.

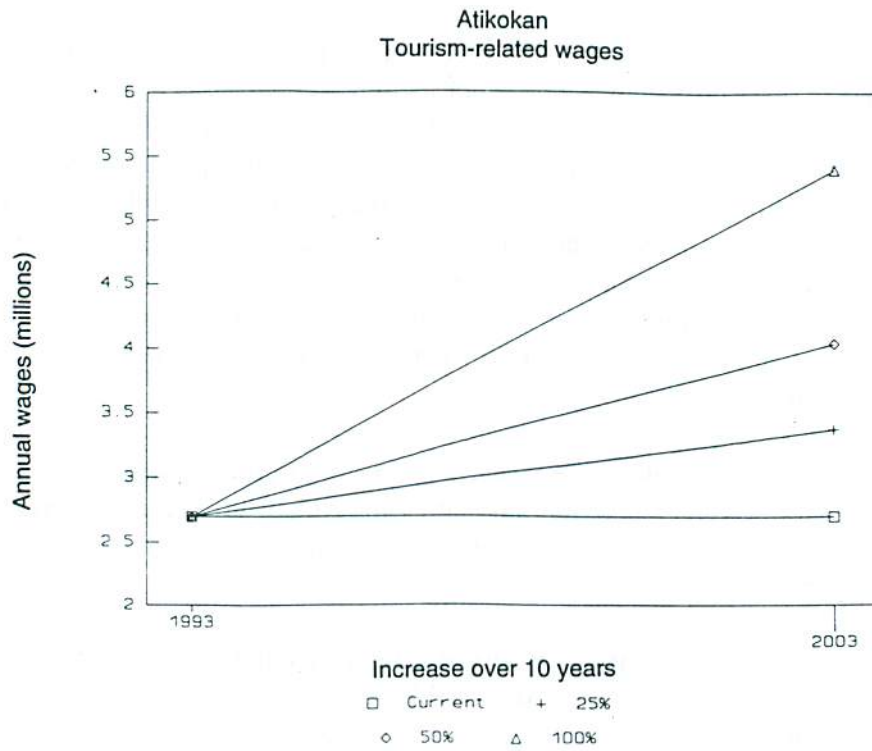


Figure 6. Wages earned in tourism in Atikokan in 1993, and 10-year projections to 2003.

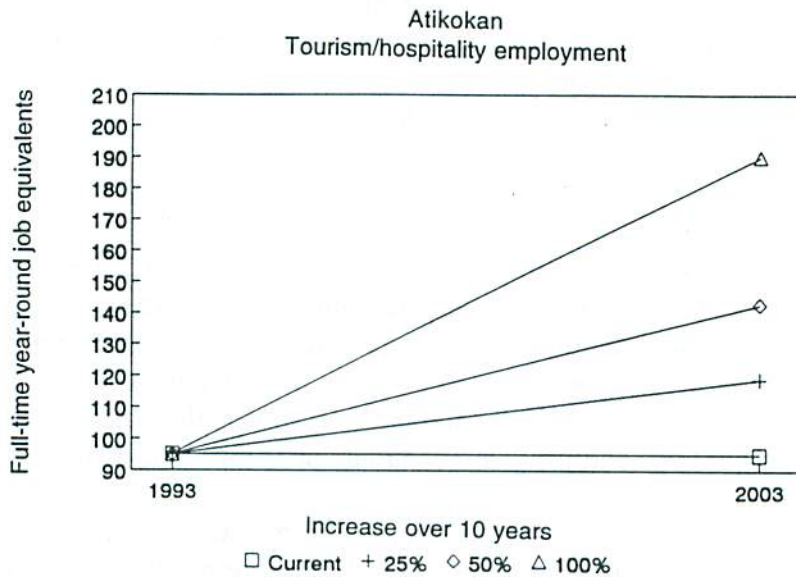


Figure 7. Employment in tourism and hospitality sectors in Atikokan in 1993, and 10-year

projections to the year 2003.

Many attractions and activities are under consideration for Atikokan and the surrounding area. Virtually all of these are likely to be good tourist attractions and thus create employment, but to be implemented most will require a significant amount of government funding. Each of the projects may be worthwhile and, as a group, could significantly contribute to increased tourist visits to Atikokan. The current fiscal constraints in the public sector may severely impede the implementation of several of the higher capital cost initiatives, yet it is these particular initiatives that could be the main attractions to Atikokan.

Achieving a 100 percent increase in tourism levels in Atikokan and the surrounding area during the next 10 years will be a major challenge.

FACTORS FOR COMMUNITY SUCCESS IN ECOTOURISM IN ATIKOKAN

One of the activities at the second community meeting involved people using the "Factors for Community Success in Ecotourism" assessment tool. Individuals involved were asked to identify community strengths and opportunities for improvement. A summary of their assessment follows.

A. Attitude

The community is open to entrepreneurs, both local and those coming from outside the community. Atikokan is somewhat ambivalent about supporting tourism.

B. Community leadership and direction

Potential leaders are emerging and there is greater interest in tourism on the part of community leaders. Improvement is needed to develop community partnerships and to increase understanding in the community about the benefits of tourism to the local economy.

C. Protection of tourism features

One important issue concerns the need to ensure that appropriate levels of protection are in place for tourism features. In Quetico Provincial Park this would mean controlling the number of visitors so as to prevent the deterioration of sites. Regarding ecotourism outside the park, the issue is one of balancing resource users (e.g., harvesting) with the remote tourism industry.

D. Marketing and promotion

Data collection is seen as a good starting point, particularly for people stopping at the highway tourist information booth. Special events, especially sports days, provide a successful way to attract tourists who have a variety of interests or connections to the community. A tourism marketing plan is viewed as a critical need.

E. Tour product

The community can offer a variety of quality tour packages with available entrepreneurs and guides. In fact, Atikokan's Sunset Country Guides Association is seen as a model, and is being used elsewhere. While these areas are identified as strengths, it is felt that they can still be expanded.

F. Financial support

The availability of capital, generated through local fundraising and government sources, is an area that requires attention.

ROSSPORT

Rosspport is located just off Highway 17, approximately 2 hours east of Thunder Bay, Ontario, on the north shore of Lake Superior. With only 160 residents, it has declined over a number of years from a population high of approximately 350. Census data is not available for Rosspport because it is not a municipality, and there are no other readily accessible or reliable estimates of its labor force, income, education levels, etc.

At one time, Rosspport was an active community and the home base of a Lake Superior commercial fishing fleet as well as associated processing services. The community is bisected by the main line of the Canadian Pacific Railway. It is now a bedroom community for many people employed in Schreiber or Terrace Bay.

Because of its proximity to very picturesque islands in Lake Superior, it has attracted the interest of highway travelers and boaters with sufficiently large craft to traverse open stretches of Lake Superior. Over the years, this unorganized community has catered to visitors on a modest scale. The annual fishing derby is a source of revenue for the community's Local Services Board, which maintains Rosspport's limited community infrastructure and services.

Virtually all commercial activity in Rosspport is based on tourism and hospitality. While few of these businesses furnish full-time year-round employment, they do provide a good number of such job equivalents. Many Rosspport businesses are operated on a part-time basis by owners who have full-time employment in either Schreiber or Terrace Bay. For some owners, their business provides additional income, a hobby, or the potential for retirement activity.

Residents are somewhat divided on the issue of increasing tourism. A number of individuals, some of whom own tourist businesses, want more tourism. They believe that residents of the Rosspport/Schreiber/Terrace Bay area must do what they can to lessen their economic dependence on the area's major employers, because these face an uncertain future. However, residents who view the main employers as being less threatened, or who are not dependent on them, wish to avoid further growth (particularly related to tourism) because they consider that an influx of visitors would detract from their lifestyles in Rosspport.

Over the last 5 or 6 years, many Rosspport residents have been actively involved in community development forums and planning workshops. While these sessions have not resolved all issues relating to expanded tourism in the area, they have yielded some broadly based guidelines. The Rosspport Tourism Opportunities Study was completed in 1990. The tourism study, plans stemming from community development workshops, a marina development study (begun in March 1994), and community support are all contributing to the gradual expansion of tourism in and around Rosspport.

ROSSPORT AND AREA TOURIST ATTRACTIONS, FACILITIES, AND SERVICES

The following list provides an overview of tourism related facilities and attractions in the Rosspport area:

- islands in Lake Superior
- dock
- Rainbow Falls Provincial Park
- Rosspport Provincial Park
- playground and beach area
- 1 inn providing accommodation and a restaurant
- restaurant
- 3 bed and breakfast establishments and apartments
- 2 gift shops
- 2 fishing charter operations
- kayak and canoe rentals
- fishing tackle, convenience items, and snacks

Employment: An estimated 15 full-time, year-round job equivalents are fully or partially sustained by tourism in Rosspport.

Source: Key respondent interviews

ROSSPORT DOCKAGE 1993

- | | |
|---------------------------|--------------------|
| · vessels | 180 |
| · visitors | 3-4 per vessel |
| · average length of stay | 1-3 nights average |
| · transient boater nights | 1 260 |

Source: Rosspport Harbor Master

ROSSPORT/TERRACE BAY/SCHREIBER AREA VISITORS

Radius of Terrace Bay	Within 40 km	Within 80 km
Roofed accommodation	354 rooms	480 rooms

Campsites	347	453
Estimated annual overnight visitors	89 000	136 000
Estimated summer highway tourist traffic (Terrace Bay/Schreiber Area)	483 800 people	

There are no reliable estimates of the number of highway travelers who visit Rosspport.

Sources: E.D.A. Collaborative. 1993. Long Lake–Aquasabon–Kenogami Waterway development study, Toronto, ON.
 Lehman and Associates. 1991. Rosspport tourism opportunities study, Toronto, ON.
 Hough, Stansbury and Woodland Ltd. 1989. Superior North tourism corridor study, Toronto, ON.

RAINBOW FALLS PROVINCIAL PARK AND ROSSPORT CAMPGROUND

The following information was extracted from registration records supplied by the OMNR for the period 21 May to 19 September 1993:

Total camper nights 11 627

Total day users 7 987

Source: Ministry of Natural Resources, pers. comm.

Using the information supplied by the ministry, it is not possible to determine the number of visitors or the size of the parties. The actual number of visitors is less than the sum of camper nights and day users, because a camper may stay more than one night and a day user may visit the park on more than one occasion. In both cases they would be "double counted" in these figures.

Economic Impact of Rainbow Falls and Rosspport Campground

The information for Table 5 was derived from the input/output economic impact analysis conducted by the OMNR using its Regional Economic Impact Model (REIM). The REIM data supplied by the ministry was manipulated so that it could be presented as shown. The original REIM input/output analysis is appended to this report, as are two glossaries of REIM terms. The impact analysis is based on \$573,742 in expenditures, which include OMNR operating and capital budgets, and estimated visitor spending by Rainbow Falls Provincial Park and Rosspport Campground users within 40 km of the park.

Table 5. Rainbow Falls/Rosspport campground impacts
 OMNR Regional Economic Impact Model: Input/output analysis,
 1992 wages and salaries.

<u>Scope</u>	<u>Impacts</u>		
Provincial scale	Direct	Indirect/induced	Total
Wages and salaries	\$342,163	\$389,403	\$731,566
Person years of employment	10.4	11.1	21.5
Northwestern Ontario Scale	Direct	Indirect/induced	Total
Wages and salaries	\$269,961	\$307,191	\$577,210
Person years of employment	7.8	8.7	16.4

\$35,197 Average wage/salary per full-time, year-round equivalent job (related to Rainbow Falls Park).

Source: MNR - Rainbow Falls Provincial Park, pers. comm.

SOCIOECONOMIC CHALLENGES TO ECOTOURISM IN ROSSPORT

How does an unorganized community act collectively?

Rosspport is currently an unorganized community operating under a Local Services Board. The board has a narrow range of responsibilities, limited by the Municipal Act to supplying water, sewer, lighting, fire, recreation, and garbage collection services. Therefore, how can the community organize itself to develop tourism opportunities, improve its image, or establish the infrastructure needed to support tourism? The Rosspport Area Conservation and Development Group has filled that gap to some extent by community-based decision making. However, it is not incorporated and has no mechanism to raise money, or to require or prevent any action on the part of an individual or business.

What form of management of the Rosspport Islands will best serve the community and the islands?

The Rosspport Islands are a wonderful asset to the community. The Rosspport Islands Management Board, a unique partnership between the Ontario Ministry of Natural Resources and the community of Rosspport is currently developing a management plan for the area. The plan will include recommendations for a variety of permitted and restricted uses on each of 15 islands. A draft strategic plan and land use guidelines were circulated for public comment in 1993.

As described in the strategic planning document, "The Rosspport Islands Management Board would have responsibility for leadership of the planning process, including initiation of the plan development, monitoring activities on the Islands, conducting periodic reviews of the plan, developing revisions to the plan, and entering into research agreements to study the Islands. The OMNR would have responsibility for management of the approved plans, including issuance of land use and work permits that conform to the plans, providing enforcement of fish and game laws and the board's plans, and assisting the board with the provision of appropriate data bases

and expertise.¹

The hope is that this form of management will ensure that the island ecosystems are protected. Questions remain about whether some form of provincial or national park might provide stronger ecosystem protection and at the same time increase the tourism benefit of the islands to Rosspport. The government is now discussing internally a national marine park to be established on the shore of Lake Superior. This issue will no doubt be an important one for the community in the coming years, and should merit careful attention by Rosspport citizens.

A SHORTLIST OF ECOTOURISM OPPORTUNITIES IN ROSSPORT

In Rosspport there is general agreement regarding the keys necessary to dramatically expand tourism levels and local economic benefits. Specifically, it is felt that these keys are:

- the Rosspport Islands and;
- development of the Rosspport Marina.

In the opinion of participants, careful, well-planned development of the islands and the marina is the foundation of the overall plan. The following opportunities and initiatives were shortlisted in the initial workshop:

- retreat for artists
- museum/information centre
- cross-country skiing trails
- snowmobile destination
- voyageur excursions
- brochure
- underwater interpretive trail
- smelt fishing festival
- regattas
- kayak symposium
- photo hunting tours
- islands

¹Rosspport Islands Management Board. 1993. Strategic plan and leisure guidelines. Rosspport, ON. Draft copy.

The following priorities were established by participants in the final workshop, based on practicality and potential impacts:

Very high potential

Marina
Islands
Snowmobile destination

High potential

Brochure
Underwater interpretive trail
Regattas
Kayaking
Photo hunting tours

Medium potential

Museum/visitor information centre
Artists retreat
Cross-country ski trails
Smelt fishing festival

Low/very low potential

Voyageur excursions
Trout stocking
Dog sled races

PROJECTIONS, COMMENTS, AND OBSERVATIONS

Participants in the Rosspport workshops targeted a 300 percent growth in the level of tourism over the next 10 years. Considering the small base from which they are starting and the opportunities that exist, a growth rate of 300 percent or more appears possible, but uncertain. It depends very much on the timing of the implementation of two major initiatives that have been identified by The Rosspport Area Conservation and Development Group (RACDG) and the Rosspport Islands Management board (RIMB). These are:

- greater utilization of the Rosspport Islands, managed so as to prevent deterioration of the natural environment; and
- development of a full service marina catering to seasonal and transient boaters.

A number of initiatives relating to land use planning and inventory of the Rosspport Islands are currently under way. The pursuit of these initiatives, combined with more effective marketing, should bring higher levels of tourism in the near future.

The Rosspport Islands Management Board is a unique organization that has been designated by the OMNR as having a leadership role in land use planning on the islands. It concerns some residents that the ministry believes that the board should have no say in directing private development on private property on the islands, even for large development projects, and that the ministry may choose to ignore the board recommendations at any time.

A significant portion of Rosspport's potential lies in its ability to cater to both transient and seasonal boaters in the region. Consequently, the timing of the marina development is a critical factor, because it would be an attraction in Rosspport, and would be the base of operations for most activities and business taking place on the islands.

Feasibility analyses and conceptual plans are being developed for the Rosspport marina. It is

anticipated that a study, currently underway, will be completed by the end of 1994 and will provide the basis, if warranted, for long-term development of the facility.

Rosspport has been and will continue to be an important destination for boaters plying Lake Superior. Development of the marina will have a major impact on the number of transient and seasonal vessels in the area. It should be noted that Rosspport's potential to attract transient boaters (*See* Table 6), while partially dependant on the type and range of its own marina facilities and complimentary activities and attractions, is to a great extent dependent upon the timing of development of other marina facilities from Thunder Bay to Sault Ste. Marie on the Ontario side of Lake Superior. Until there is an appropriate network of major and minor marinas along the Canadian shoreline, only larger vessels capable of extended open water operation will be able to comfortably reach Rosspport from the east. (There is better protection, in the lee of sheltering islands, most of the way from Thunder Bay and Nipigon to Rosspport.)

Because of the unique characteristics of the Rosspport Islands and the surrounding area, a 300 percent increase in the level of transient boater activity over a 10-year period may in fact be a conservative estimate of growth potential.

Table 6. Projections of transient boaters in Rosspport.

	Current	Projected percent increase			
		100	200	300	400
Vessels per season	180	360	540	720	900
Average number of boats per night	2	4	6	8	10
Average number of people per boat	3.5	3.5	3.5	3.5	3.5
Average number of people per night	7	14	21	28	35
Average length of stay (nights)	2	2	2	2	2
Total boater nights per season	1 260	2 520	3 780	5 040	6 300

It is important to recognize that Rosspport and other communities with marina facilities on Lake Superior have the potential to draw many transient boaters, not only from Canadian communities, but also from American communities on the south shore of Lake Superior and from other Great Lakes home ports. There are strong indications that boaters who use Lakes Huron and Michigan, in particular, are anxiously awaiting the development of the north shore of Lake Superior so that they may safely travel on this relatively under utilized lake.

A principal uncertainty for Rosspport's development is the community's ability to attract major financial commitments from the federal and provincial governments to develop the marina. Because of very high capital costs it will be virtually impossible for the private sector to build the type of facility required to dramatically improve tourism in the area. However, the private sector could operate the marina and establish the spin-off businesses that are envisioned. The marina infrastructure would have to be built with substantial government support if it is to be of the required size and quality.

Because of the islands, Rosspport and the neighboring communities are in a unique position to offer a diverse ecotourism experience to individuals traveling on land or water. Some of the underlying components required for diverse ecotourism experiences are in place in the Rosspport and islands area, but further work will be needed to ensure thoughtful development and utilization of the region's physical resources.

There is also some potential for winter tourism. Rosspport is very close to the Northern Ontario Snowmobile Trail Network, which is receiving substantial financial support and marketing assistance from government and local community groups. It has been demonstrated in other parts of the province that communities and businesses that cater to tourists in the summer can, if desired, generate incremental increases in certain activities during the winter months by catering to snowmobilers.

For a community of its size, with relatively low levels of tourism, Rosspport has an interesting range of businesses. Virtually all the businesses in the community are heavily dependant on tourist traffic for their viability. With few exceptions, the majority of the businesses do not provide full-time employment for the owners, who in most cases have other sources of income. The majority of employees are part-time and seasonal; therefore, several of the existing businesses provide supplementary income at best. Some businesses could function more as hobbies.

It can be anticipated that with growth of the magnitude projected, several of Rosspport's businesses will become more financially viable and, over time, the potential exists for them to generate substantial new seasonal employment opportunities (Figs. 7 and 8). A few that currently operate only seasonally could begin year-round operations in a few years.

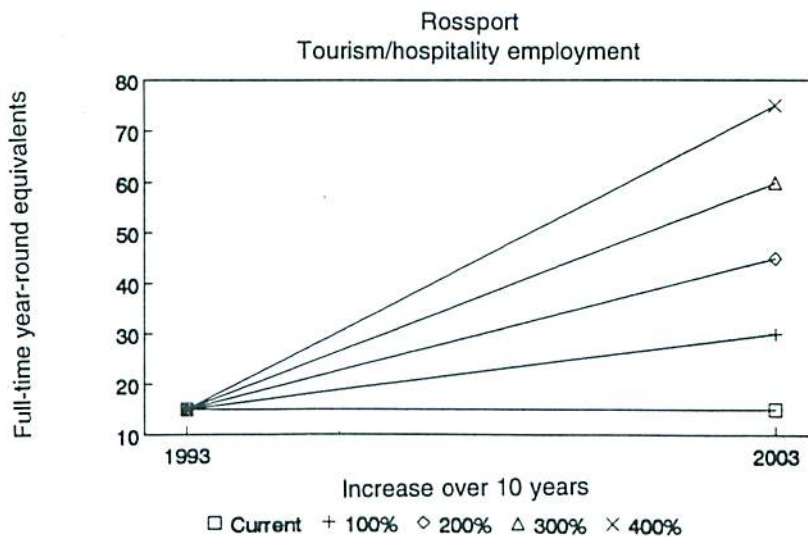


Figure 8. Employment in tourism and hospitality sectors in Rosspport in 1993, with 10-year projections.

There are also opportunities for new businesses to become established, based on a significant increase in the level of tourism. In particular, there are shortages in the hamlet of fixed roof accommodations, and of moderately priced meals. See Figure 9 for the growth potential in tourism-derived wages under several growth scenarios.

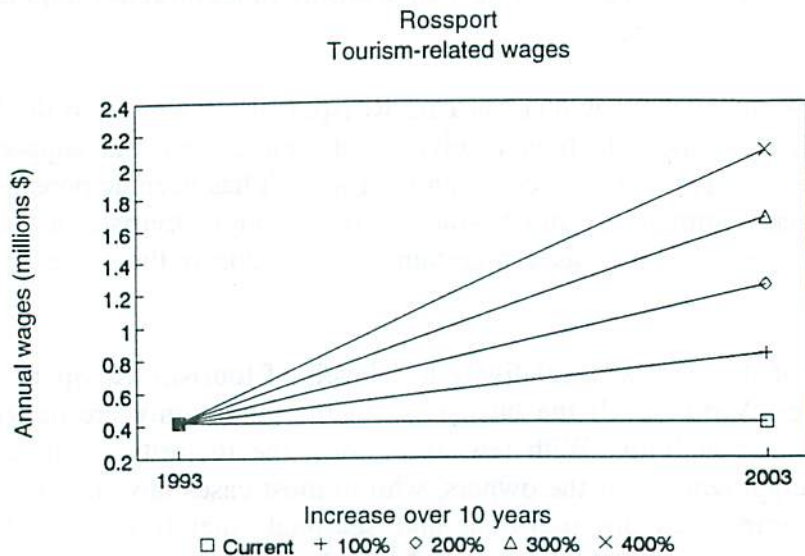


Figure 9. Wages related to tourism in Rosspport in 1993, with 10-year projections.

Several studies completed in Ontario and in other parts of North America clearly indicate that transient boaters, and to a lesser extent seasonal boaters, spend a significant amount of money in the communities where their boats are either temporarily or permanently docked. When visiting a community, transient boaters in particular are anxious to spend time off their boats sightseeing, shopping, dining, and spending nights in local accommodations.

The participants in the Rosspport community workshops identified a number of initiatives and opportunities that would complement the islands and the marina. Most of these add to the range of activities available to both land- and water-based visitors. The opportunities identified as being of medium to very high potential should contribute to the creation of a foundation that will enable Rosspport and the surrounding area to become both a significant destination and a stopping point for people on longer journeys.

Achieving the anticipated gains in tourism will depend upon being able to foster and expand partnerships between the public and private sectors. These have already begun to be established in the Rosspport area.

Because of government fiscal constraints, plans for the implementation of the marina development may be delayed. Nevertheless, planning should continue to implement a variety of initiatives that will complement the islands and the marina, and attract land- and water-based visitors.

Taking all of these factors into consideration, there is a significant potential in Rosspport to expand existing businesses and to eventually establish new ones that offer a wider range of products and services. New employment opportunities for local residents will result.

FACTORS FOR COMMUNITY SUCCESS IN ECOTOURISM IN ROSSPORT

One of the activities undertaken at the second public meeting was to help people assess their community using the evaluation tool "Factors for Community Success in Tourism and Ecotourism". Individuals were asked to identify the community's strengths and opportunities for improvement. A summary of their comments follows.

A. Attitude

There was general agreement that a desire does exist within the community to develop ecotourism, and that there is a need to expand the economy so that people will be less dependent on resource-based industries in the area.

Workshop participants discussed the need to further identify the benefits of tourism. Change may be necessary in the level of resident's attitudes to improve their openness to outsiders. The current relationship was described as one of "healthy scepticism".

B. Community leadership and direction

Workshop participants identified local strengths in the fact that plans are being made to increase tourism, and that capable leaders are available within the community. As in other communities, participants felt that the dynamics of the local economy were not well understood. A need was identified to ensure that the economic benefits of ecotourism in the area are recognized.

D. Features and protection

One of the unique features of Rosspport is the feeling of nostalgia and quiet that people experience there, and this keeps them coming back. People in the community see Rosspport and the Rosspport Islands as part of a larger whole that involves Lake Superior. Lake Superior is currently receiving international attention, and Rosspport can benefit. Work is underway, but not yet completed, on a land use plan for the Rosspport Islands. However, additional protection is needed for the heritage resources in the area. These include the shipwrecks and the Native artifacts on the islands. According to those individuals present, Ontario law affords insufficient protection for these relics.

SYNTHESIS

FACTORS FOR COMMUNITY SUCCESS IN ECOTOURISM: A COMMUNITY ECOTOURISM SELF-ASSESSMENT

FACTORS FOR COMMUNITY SUCCESS IN TOURISM

The following is a list of factors required to develop a successful tourism program. It consists of a checklist of questions prepared from the perspective of a community. The checklist can be used by the communities to assess their readiness to attract tourists and tourism entrepreneurs. It can also help communities to prevent some of the potentially negative impacts of tourism. A readiness for tourism in general is a prerequisite for pursuing ecotourism. Questions that relate more specifically to ecotourism are also provided.

Development of this tool was based on research and meetings in Atikokan, Armstrong, and Rosspport, Ontario; Ely, Minnesota; and Bayfield, Wisconsin. It is also based on a review of ecotourism literature.

A. ATTITUDE: Does the community consider tourism beneficial?

1. DESIRE: Does the community want to develop tourism?
2. NEED: Is there pressure to diversify the economic base by developing tourism?
3. OPENNESS TO OUTSIDE ENTREPRENEURS: Is the community open to and supportive of developments by outside entrepreneurs?
4. OPENNESS TO LOCAL ENTREPRENEURS: Is the community open to and supportive of developments by entrepreneurs within the community?
5. OPENNESS TO THE PRESENCE OF TOURISTS IN THE COMMUNITY:
 - a) Are community members willing to share their community with outsiders and to treat them in a welcoming way?
 - b) Are community members willing to be helpful and friendly to tourists?
6. OPENNESS TO THE PRESENCE OF TOURISTS IN THE SURROUNDING AREA: Are community members willing to share with tourists the natural resources surrounding the community?
7. APPRECIATE BENEFITS: Does the community appreciate the benefits that an increase in tourist traffic can bring to the residents' quality of life?
8. SEE THE AREA AS OTHERS SEE IT:
 - a) Are community members able to see and appreciate the tourism features?
 - b) Are community members able to see their community (good sides and bad) through the eyes of a visitor?

B. COMMUNITY LEADERSHIP AND DIRECTION: Does the community work together to achieve its strategic plans, including tourism?

1. PLANNING:

- a) Are community economic development plans in place to encourage and support the development of tourism in an effective way?
- b) Are plans in place to permit the community to act quickly to take advantage of opportunities should they arise?
- c) Are plans in place to ensure that the economic benefits from use of tourism resources in the area are received by the community?
- d) Have ideas and opportunities been tested for market potential, financial viability, and the likelihood of private or public sector investment?
- e) Is the tourist niche that the community has chosen, and the appearance of the community needed for that niche, protected by by-laws or other enforceable agreements?

- 2. **COMMUNITY PARTNERSHIPS:** Do community agencies work together to achieve their common goals?
- 3. **LEADERSHIP:** Are the required organizations and people available to help the community develop tourism?
- 4. **HUMAN RESOURCES:** Do both community organizations and local businesses provide training for staff to ensure a high quality of service for tourists?
- 5. **COLLABORATION:** Do people in the tourist industry work collaboratively with other resource users to meet all tourism needs and ensure the sustainability of tourism resources?
- 6. **ECONOMIC UNDERSTANDING:** Does the community as a whole understand the nature of the local economy and the role of tourism?
- 7. **MULTISTAKEHOLDER MECHANISMS:** Are mechanisms in place that facilitate multistakeholder planning and problem solving of issues that affect the natural resource base?
- C. FEATURES AND PROTECTION: Does the community base tourism on world-class natural features that are managed for sustainable tourism use?**
 - 1. **SIGNIFICANCE OF THE FEATURES:** Are the natural features or parks of world class? Can they compete with natural features that can be found closer to major markets?
 - 2. **PROTECTION:** Are the natural features recognized in land use and resource management plans? Are these tourism sites afforded the kind of protection they need for sustainable tourism use?
 - 3. **PRO-BUSINESS ATTITUDE:** Do park or land use plans encourage tourism businesses while protecting the natural features?

4. PART OF A BIGGER PICTURE: Is the community identified with and promoted as part of a bigger tourism attraction or destination?

D. MARKETING AND PROMOTION: Are systems in place to attract tourists?

1. UNIQUE NICHE FOR COMMUNITY:

- a) Has the community identified and developed a unique niche for itself?
- b) Can it promote that niche in a way that makes the area interesting to tourists?

2. MARKETING PLAN:

- a) Is a marketing plan in place?
- b) Is it updated regularly?
- c) Does it include a broad range of tourism attractions?
- d) Does the marketing plan focus on the appropriate market for the community's niche?

3. DATA COLLECTION AND ANALYSIS:

- a) Are records kept at tourist bureaus, provincial parks, etc., on information such as visitor's interests, where they are from, their destination, length of stay, and spending patterns?
- b) Is the information analyzed regularly, and are attempts made to respond to any weaknesses that are identified?

4. PROMOTIONAL MATERIAL: Does the community have available promotional material about the various attractions, activities, and businesses in the area?

5. PROMOTIONAL COST SHARING: Are mechanisms in place for businesses to cost share promotional efforts?

6. SHARING LEADS AND CUSTOMERS:

- a) Are arrangements in place to share leads and prospective customers among businesses and agencies?
- b) Is there cooperation among businesses to try to keep customers in the region?

7. SPECIAL EVENTS: Does the community make use of special events to attract people to the area and raise its profile?

E. TOURISM PRODUCTS: Is a range of popular tourism products being offered?

1. VARIETY AND QUALITY:

- a) Is a range of tour packages available, in terms of price levels, age of target groups, degree of difficulty, focus, and duration?
- b) Are the packages of good quality and do they provide good value for the money?
- c) Are all safety practices up to standards?

2. ENTREPRENEURS: Are entrepreneurs available with the commitment, facilities, equipment, and money to create tourism businesses?
 3. GUIDES: Are guides/naturalists/interpreters ready, willing, available, and properly trained?
 4. PACKAGING: Are coordinated or complementary tourist packages available that can be combined as a group of attractions?
 5. RAINY DAYS: Are there activities available to occupy tourists on rainy days?
 6. SEASON EXTENSION: Is attention being given to identifying ways to extend the tourist season to all four seasons?
 7. MAXIMIZING BENEFITS: Are related businesses being developed to complement tourism and increase the benefits accruing from tourism?
- F. INFRASTRUCTURE: Are developments in place to help tourists experience the area's natural features with minimum impact, and to enjoy the local creature comforts?**
1. FACILITIES: Are quality, comfortable accommodations and restaurants available in appropriate price ranges?
 2. ACCESS: Are roads, bridges, and docks in place so that tourists can gain access to environmental features yet still create minimal impact?
- G. FINANCIAL AND OTHER ASSISTANCE AND SUPPORT: Is financial support available for the community's development?**
1. PRIVATE CAPITAL: Are private funds available to support the development of tourism?
 2. LOCAL FUNDRAISING:
 - a) Can the community raise funds to contribute to tourism development?
 - b) Is there a mechanism in place (e.g., a resource development corporation) to collect funds, apply for matching or other funding opportunities, pay out disbursements, and exert responsible financial control?
 3. GOVERNMENT CAPITAL: Are community leaders aware of government assistance programs and how the community might benefit from using them?
 4. BANK SUPPORT: Are local banking officials aware and supportive of the community's tourism development plans?

5. RELATIONSHIPS WITH SUPPORTIVE AGENCIES: Does the community have a good working relationship with the agencies that might support tourism development?

SPECIFIC FACTORS FOR COMMUNITY SUCCESS IN ECOTOURISM

An attitude of openness and readiness for tourism in general is an important prerequisite for ecotourism. In addition, the following factors apply more specifically to ecotourism.

1. UNDERSTANDING THE ECOTOURISM MARKET:
 - a) Are efforts being made to understand what is of interest to tourists, and to develop the types of facilities and attractions that encourage tourism?
 - b) Has the special type of ecotourism customer been well identified?
2. ECOTOURISM ACTIVITIES: Do the available tourism products take into account the ecotourists' interest in natural, historic, cultural, and human features?
3. INTERPRETIVE MATERIAL AND EXPERIENCES:
 - a) Has the community prepared brochures and leaflets to interpret the natural features to visitors?
 - b) Has the community prepared leaflets and brochures for people to use on self-guided tours in the area?
 - c) Are programs available with guides who have in-depth knowledge?
4. EDUCATION: Are programs in place to help people learn about the heritage and natural history of the area?
5. COMBINING OUTDOOR ADVENTURES WITH CREATURE COMFORTS: Are there ways that ecotourists can gain easy access to an outdoor experience or unique natural features, and yet have comforts available daily or at the beginning and end of their trip?
6. ECONOMIC CONTRIBUTION: Are mechanisms in place for ecotourists to help pay for the protection and sustainability of the features they visit and enjoy?
7. STANDARDS TO PROTECT RESOURCES FROM USERS: Are codes of conduct or guidelines in place that will ensure the ongoing protection of resources from users?
8. QUALITY OF THE NATURAL EXPERIENCE:
 - a) Can ecotourists experience natural areas that are significantly less altered by human activities than are areas closer to their homes?
 - b) Do tours reflect on appropriate use of resources?

A previous draft of this set of factors was discussed during the second community meetings in

Armstrong, Atikokan, and RosSPORT. The discussion had two purposes: 1) to check the list to see what changes people felt were needed, and 2) to solicit participant's opinions on the degree to which these factors are present in their communities. Participants were asked to identify a local strength and weakness in some of the categories. The comments are found at the end of the overview discussion for each community.

Field-testing the questions at the community meetings demonstrated that this is a useful self-assessment tool. It also indicated how complex the process of preparing for ecotourism can be. Discussions reflected the authors experience in the communities, and it is considered that responses are reasonably accurate.

PRESENCE OF ECOTOURISM FACTORS IN THE FIVE COMMUNITIES

This discussion will assess the five communities against key areas in the "Ingredients for Community Success in Ecotourism". It will compare and contrast areas of strength and opportunities for improvement.

FACTORS FOR COMMUNITY SUCCESS IN TOURISM

A. ATTITUDE: Does the community consider tourism beneficial?

In both Ely and Atikokan, tourism development occurred after economic dependence on mining was no longer possible. The mine in Ely closed in 1960, and other mining activity in the area gradually diminished during the 1960s and 1970s. In Atikokan, the mines closed in 1980. In both cases there has been a reluctance to move toward a tourism-based economy, but attitudes have changed more in Ely than in Atikokan. Part of the reason may be that more time has passed and more extensive results have been achieved from tourism development in Ely. It appears that community support for tourism increases as the benefits become more apparent, or as the inevitability of change becomes more clear.

In all five communities, the need to diversify the economy has been a prerequisite to tourism development. In most cases tourism doesn't just happen—it comes about because the community has identified a need to add to the area's economic base. In such cases the impetus comes from the community. Of the five communities, tourism in Armstrong is the most entrepreneurially (and externally) driven. The entrepreneurs, rather than the community, have been the driving force.

A willingness to share the community and the area with tourists has been a consideration in all the communities. For example, a willingness to share the serenity and ambience of RosSPORT is an issue for RosSPORT residents, because of the concern that a high volume of tourists could develop too quickly. Also, there has been some reluctance in Ely, Atikokan, and Armstrong to share fish and game resources.

All five of the communities cited a need for increased understanding of the economic benefits of tourism. For example, the International Wolf Center in Ely, was aware of the need to

communicate its economic benefit to local people. An excellent method was found somewhat accidentally—the hand stamp used when visitors to the center paid their entry fee. An average of 400 people per day in the first season were shopping in businesses throughout the community. The community quickly saw how important the International Wolf Center was to tourism in the area. Because tourism is sometimes a poorly understood industry, innovative as well as routine methods for increasing community understanding are needed.

All five of the communities feel some scepticism about outside entrepreneurs. However, it often seems that outsiders see opportunities and have the ingenuity, skills, and capital to develop them. In Bayfield, measures have been taken through zoning and other by-laws to ensure that any outsiders who establish businesses will develop them in the spirit of the community and its tourist niche.

B. COMMUNITY LEADERSHIP AND DIRECTION: Does the community work together to achieve its strategic plans, including those for tourism?

In preparation for the creation of the Apostle Islands National Lakeshore, a major effort in strategic planning was carried out in Bayfield approximately 20 years ago. To a large extent the vision that was developed at that time has been implemented, but there is now a feeling that once again it is time for the community to carry out some planning exercises.

Of the Ontario communities studied, Rosspport seems to have done the most work at developing a communitywide sense of direction. This may have been a somewhat easier task than in other communities because of Rosspport's small size, but much vision, patience, and leadership have nevertheless gone into the process. While the residents are in favor of cautious development, they do not want to lose the character of the community.

Both Armstrong and Atikokan are trying to balance tourism and other resource-based activities. Each community must find its own balance, dependent in part on the economic benefits that can be achieved by the various alternatives. Until that balance point is found, it can be difficult to carry out planning.

It is essential that any community wishing to be successful in tourism develop a unique market niche. Ely's niche is "the end of the road—gateway to the wilderness". This includes canoeing, resorts, power boating, fishing, sightseeing, shopping, and dining. There are activities for everyone, and each fits into the wilderness theme. Together with Atikokan, Ely shares the world-class one million hectare wilderness area of the Boundary Waters Canoe Area and Quetico Provincial Park. Geography and proximity to tourist markets have made it easier for Ely to capitalize on this opportunity. To date, however, Ely has also worked toward its own success to a greater degree than has Atikokan.

With Armstrong, Ely shares "the end of the road—gateway to the wilderness" theme, but Armstrong has yet to fully capitalize on its unique position as a gateway to real wilderness experiences, though it is adjacent to a world-class wilderness area.

Bayfield's niche has two points of focus: 1) the quaint old community with its period buildings and sedate style, and 2) the beauty and relatively protected access to Lake Superior and the Apostle Islands. Bayfield and RosSPORT share these qualities, although the sense of history is not yet well developed in RosSPORT. Lake Superior is of major importance because it is the largest body of fresh water in the world and it remains relatively pristine. This is a feature from which both communities can benefit.

Both Ely and Bayfield are well ahead of the Canadian communities regarding the establishment of partnerships. In both cases the local chambers of commerce were key players in uniting the business community for planning, marketing, and accommodation referrals. The ability of the tourism industry to act in concert has made a big difference when promoting these communities as a destination. In addition to joint marketing, entrepreneurs can promote their own businesses.

Collaboration with other resource users seems to have become less of a challenge in Ely, Bayfield, and RosSPORT than in Atikokan and Armstrong. In both Ely and Bayfield there is very little timber harvesting. This is as a result of four factors:

1. The significant area of private lands;
2. Most merchantable timber has already been cut;
3. Much of the land is designated for tourism purposes; and
4. The timber harvesting that does occur is described as "below cost". In other words, the cost to the government of making timber available is less than the revenue derived when it is cut. Ongoing discussions are concerned with eliminating "below cost" timber sales.

Much of the timber near RosSPORT has already been harvested. The second growth stands around the community are in mid-rotation, and therefore are too small to be cut. The topography in the area is also very rugged. This makes some of the forest inaccessible and of low capability for producing timber.

Because forest products jobs are important in both Atikokan and Armstrong, Discussions regarding resource allocation between timber and tourism are vital.

The training of people who work in service industries has been of particular importance in Ely, thereby allowing them to do their job and also be good tourism ambassadors.

C. FEATURES AND PROTECTION: Does the community base tourism on world-class natural features that are managed for sustainable tourism use?

All five of the communities studied are located in places where natural features can be a major attraction, and each has a major protected area available for use. Tourism carried out adjacent to these protected areas will need to justify its economic benefit in order to be adequately buffered from logging and other forms of development.

As discussed earlier, there is a need to look at increasing the economic returns of provincial

parks. Under the present economic climate it is not likely that this can be done with government funds, but rather will require the encouragement of appropriate entrepreneurship.

D. MARKETING AND PROMOTION: Are systems in place to attract tourists?

This is clearly an area where, to date, the efforts made in Ely and Bayfield are more sophisticated and more successful than those made in the Canadian communities. In Canada, the collection and use of tourism-related information is needed. The single biggest need is joint efforts among stakeholders.

Rosspport has demonstrated an uncanny ability to receive excellent coverage in major newspapers and magazines, due in part to its connection to Lake Superior. Other factors are the charm of the community and the abilities of residents. In the winter of 1994, for example, Rosspport was featured in a "National Geographic" article about Lake Superior. As well, a major newspaper in Florida featured Rosspport on the cover of its travel section.

The Inland Sea Society, which has its headquarters in Bayfield, holds the Kayak Symposium each spring. This event combines kayaking, speeches, and discussions on issues relating to the environment and to Lake Superior. It is a good example of a special event that promotes ecotourism in general, and Bayfield in particular. A cross-country ski race in Ely is another special event that promotes ecotourism in both the community and the area.

Sports Days in Atikokan, and the Fish Derby in Rosspport are community-based special events that draw significant crowds. However, these events are not as related to ecotourism as are the events mentioned above.

E. TOURISM PRODUCTS: Is a range of popular tourism products being offered?

The variety of tourism activities available in Atikokan, Armstrong, and Rosspport could be broadened. In part, Bayfield and Ely are likely succeeding because they have a broad base of appeal; people with a range of different interests and lifestyles will find interesting things to do at a variety of price ranges and with various degrees of intensity. For the Canadian centers, creating the niche and then developing and marketing a range of ecotourism activities within that niche will constitute necessary steps. Collaboration among entrepreneurs in offering visitor packages could also be beneficial.

Extension of the tourist season and maximization of the benefits accruing from tourism are key issues in all of the centers. Ely provides a good example of how a variety of activities have made significant additions to the economy: education and research (International Wolf Center); retailing (a variety of gift, souvenir, and wilderness goods stores); manufacturing (a special type of mukluks and moccasins, and expedition and Scandinavian theme practical outdoor clothing); mail order outdoor gear and clothing; and publishing ("Boundary Water Journal" and Northwoods Press). In a number of these developments, individuals visited the community and wanted to relocate there, so they created an economic base for themselves and also benefitted the

community.

F. INFRASTRUCTURE: Are developments in place to help tourists experience the area's natural features with minimum impact, and to enjoy the local creature comforts?

Both Ely and Bayfield offer a range of interesting dining experiences that tourists enjoy. However, each is challenged by the lack of accommodation, and in Ely's case, by the quality of accommodation during the peak season. Lengthening the tourist season would help to increase the potential viability of additional accommodations.

Rosspport offers two places for fine dining, but lacks moderately priced family dining facilities. Accommodation has been in relatively short supply, but it will be expanded this season with the opening of a new bed and breakfast operation.

Armstrong has a new, good quality restaurant that features a bush plane theme. The theme is very appropriate to tourists who come to Armstrong. Quality accommodation is also available.

Atikokan has a variety of restaurants and adequate accommodation.

For any water-based tourism community docks and marinas are a priority, but they are also a major expense. Such facilities are currently in place in Bayfield. Some of the marinas are relatively new, reflecting a continuing growth in boating traffic. The building of a marina in Rosspport is now being studied.

If the Rosspport Islands become extensively used, campsites and tent platforms may need to be developed to ensure that the islands are not degraded by human activity. The approach taken at Isle Royale National Park should be investigated.

At Quetico Provincial Park, a quota system is currently being studied. Public input will be sought on how to manage the park so that no deterioration of the campsites and portages occurs, to prevent overcrowding, and to examine how park use can be translated into economic benefits to the Atikokan area. Ongoing monitoring of the impacts caused by human use is necessary when tourist activities make use of fragile natural resources.

In the Atikokan area outside Quetico Provincial Park, and in the Armstrong area, fish management is and will continue to be of great importance, because much remote and fly-in tourism depends on healthy fish stocks. Besides maintaining fish populations, hatcheries can provide interesting educational activities.

G. FINANCIAL AND OTHER ASSISTANCE AND SUPPORT: Is financial support available for the community's development?

While approaches in the United States and Canada are different, it is interesting to note that

government funds are often used to develop tourism in the United States. Bayfield has benefited by support received from government programs. The Iron Range Rehabilitation Fund is used to aid with economic diversification in the Ely area.

In Armstrong and Rosspoint, which are unorganized communities, it can be very difficult to raise funds locally, other than from private capital. Some sectors of the Ontario government have difficulty dealing with unorganized areas, and this can be a stumbling block to the development of communities that have tourism potential. It appears that Armstrong is missing opportunities to receive support from outside agencies, and this situation should be addressed.

SPECIFIC FACTORS FOR COMMUNITY SUCCESS IN ECOTOURISM

It is in this area that the American communities have developed considerably further than the Canadian ones.

1. UNDERSTANDING THE ECOTOURISM MARKET

Bayfield makes an effort to attract tourists who are seeking activities available in its particular ecotourism niche. The community continues to work to refine its marketing and advertising to be better able to identify tourists who are looking for the activities it offers. Ely has also identified its niche as a gateway to the wilderness.

Knowledge of ecotourists and the activities they are seeking is less well developed in the Canadian communities.

2. ECOTOURISM ACTIVITIES

Bayfield and Ely each seem to have developed an acceptable minimum number of tourism activities.

Broadening the range of activities is the main challenge facing the Canadian communities. History and culture are two areas that could be built upon. Atikokan is developing this by creating outdoor murals of past mining activity and by establishing a mining theme park. It will also be important to develop activities that are not dependent on extensive capital expenditures.

Soft wilderness tours to White Otter Castle in Atikokan is an example of the kind of tour packaging that should be developed and marketed in Canadian communities.

3. INTERPRETIVE MATERIAL

Bayfield, capitalizing on the style and history of the community, has developed interpretative booklets that describe the past functions of the heritage buildings.

Brochures, maps, and walking-tour guides could be worthwhile and inexpensive additions to the

development of historically or culturally oriented tourism in the three Canadian communities.

4. EDUCATION

Education can be an important aspect of the ecotourist's experience. Near Atikokan, natural history interpretation and education is provided at the Quetico Provincial Park Pavilion at French Lake. The International Wolf Center at Ely capitalizes on the idea of education, and has now added a research component. This combination is very appealing to tourists. Both Atikokan (with a bear or lynx center) and Armstrong (with a woodland caribou center) are considering this approach. One proposal would be to combine the proposed Quetico Research Station with a research and tourism-oriented interpretive center that features a particular species.

Educational activities can also be carried out by guided expeditions, but these are still not well developed in the Canadian communities.

5. IMMERSION NATURE AND COMFORT

Ecotourists appear to enjoy combining rough and rigorous outdoor activities with comfortable lodgings. Ely and Bayfield have provided those amenities close to their adventure areas. Rossport offers fine dining and quaint accommodation adjacent to its adventure areas. The other communities should increase their options for providing this type of service.

6. ECONOMIC CONTRIBUTION

Ensuring that the money spent on tourism stays in the area is a challenge to all three Canadian communities. Bayfield and Ely have introduced many ways for tourists to spend money locally. Their tourist operators generally live in the community, so they spend their tourism-earned dollars in town. These communities have also been successful in becoming bases for forays into other areas. More development in these areas is needed in the Canadian centers.

7. STANDARD OF PROTECTION FROM USERS

The idea of setting standards and practices for ecotourism use is more common in places like the Queen Charlotte Islands and Costa Rica. These are areas that have a high tourist density, and where animals such as whales may be disturbed by inappropriate intrusions. Some ecotourists wish to be sure that they are not damaging the ecosystem by using it inappropriately. Others will need to be reminded about the standards to ensure that they do not cause damage as a result of carelessness or a lack of knowledge.

With the exception of attempts to promote visitor education in Quetico Provincial Park and the Boundary Waters Canoe Area, there is as yet little evidence of setting standards in the communities examined. The Rossport Islands are a place where such a use code, developed now while tourist numbers are still low, could be very beneficial.

8. QUALITY OF THE NATURAL EXPERIENCE

In all five communities, ecotourists can experience a relatively pristine natural environment. It was mentioned in Bayfield that some people were choosing to go elsewhere because they felt the area was overdeveloped. Likewise, some American canoeists in Quetico Provincial Park prefer the northern entry stations because that area tends to be less crowded than the Boundary Waters or the southern part of the park. These examples illustrate that tourists will move to an area that suits their particular tastes. It also illustrates that convenience, proximity, and cost are not the only criteria that people use in choosing a vacation place. Quality enters into the picture as well.

SIGNIFICANCE OF TOURISM EMPLOYMENT

Table 7 provides an indication of the significance of tourism employment as compared to primary (forestry and mining) employment in several northern Ontario communities. The best indicator of tourism employment in smaller communities is the 1991 census. While this census does provide a basic indication, it must be noted that some of this employment would exist even in the absence of tourists because the businesses also cater to local residents and nontourist travelers. On the other hand, as an indicator of employment, it understates tourism's contribution because it does not include service staff such as guides, pilots, or charter operators, (service sector), nor those employed in retail businesses. Information on these subcategories is not available at the community level from the census data. At the same time, the combined primary and manufacturing category misses some related jobs, for example transporting materials such as logs, or providing services that are directly related to these sectors. Again, this information can not be extracted from the census data available.

Table 7. Comparison of tourism employment.

Community	Population	Labor force	Accommodation, food, and beverage service (%)	Forestry mining (%)	Manufacturing (%)
Gore Bay	916	400	15	-	7.5
Huntsville	14 997	7 640	13.8	>1	11.5
Atikokan	4 047	2 045	12	9.4	16.5
Matawa	2 454	1 105	11.8	7.7	7.2
Kearney	734	280	10.7	-	21.0
Kenora	9 782	5 130	10.6	1.7	10.6
Red Lake	2 268	1 255	10.4	18.7	1.1
Parry Sound	6 125	3 015	9.3	> 1	4.5
Blind River	3 355	1 490	8.4	15.4	6.4
Bruce Mines	684	305	8.2	14.8	16.4
Fort Frances	8 891	4 570	7.5	5.7	15.8
Temagami	939	450	6.7	8.8	3.3
Ontario	10 048 885	5 511 235	5.9	> 1	17.1

It is interesting to note that the level of tourism in these northern Ontario communities is somewhat higher than in the province as a whole, particularly when it is considered that tourism is viewed as one of the largest contributors to the provincial economy.

Making some allowance upward for tourism sector jobs (e.g., service and retail) that are not included in these figures, it is evident that tourism-related employment is very important in these communities, even when compared to the primary and manufacturing sectors. Any sector that represents 10 percent of the labor force is a significant contributor.

In Atikokan, 12 percent of the labor force is in the accommodation, food and beverage service category, 9.4 percent is in the primary (forestry and mining) sector, and 16.5 percent is in manufacturing. While most of Atikokan's manufacturing is forest related and therefore linked to primary sector employment, the contribution of tourism to local employment is substantial.

PRO-BUSINESS ATTITUDE BY THE MINISTRY OF NATURAL RESOURCES

In Ontario, provincial parks have generally been managed with the attitude that they should not be "tarnished by business activities". While maintaining the integrity of the parks system is essential, more broad and creative thinking may be needed.

The following anecdote, paraphrased from an interview with a key respondent, illustrates this issue.

Two friends from New York frequently traveled to Algonquin Provincial Park to take canoe trips, which they enjoyed very much. In fact, they enjoyed these trips so much that they decided to leave New York and go into the canoe outfitting business together.

Soon, they had completed most of a venture to buy an existing business serving Algonquin Provincial Park. However, they changed their mind when they became convinced that the Ontario Ministry of Natural Resources was not supportive of business operations in association with provincial parks.

Still, determined to pursue the idea of starting outfitting business, they redirected their efforts to the Boundary Waters Canoe Area. Despite the fact that neither of them had ever canoed in this area, they bought a business that has remained very successful. In fact, it is now a multimillion dollar canoe outfitting business that hires many employees.

Some time later they considered building a Canadian base of operations. They wanted to buy property adjacent to Quetico Provincial Park so that people could paddle from the base into the interior. No Crown land was made available, so they were unable to build. They still send many

outfitted parties into the park, however, all are outfitted from their base near Ely.

These events happened a number of years ago, and it could be argued that they are isolated incidents. It could also be argued that things have changed, and both arguments may be true. Nonetheless, the authors recount it here because it raises an important question:

Is Ontario receiving the "optimum" level of economic benefit from its provincial parks? Optimum may be defined as the maximum economic benefit possible without causing deterioration of either the natural environment or the quality of visitors' outdoor experience.

Some ideas are presented below on how this might be assisted by the provincial government:

- Make available business opportunities that entrepreneurs can develop. This could involve the establishment of concessions or facilities for equipment storage. Ministry staff need not develop the ideas—entrepreneurs may be better suited. The role of OMNR staff would be to ensure that the idea did not compromise provincial interests, cause operational difficulties, or go against a park's management plan. Government staff would also need to ensure that opportunities were fairly allocated (emphasizing Canadian operators?). This approach to increasing revenue would be more palatable than increasing park user fees, and it could result in a greater generation of economic activity.
- Establish tourism development zones adjacent to parks. These would be areas where resorts, lodges, stores, restaurants, and other developments would be clustered. From there, depending on the type of park and its location, people could hike, paddle, or drive into the park for various outings and programs.
- Assist the private sector with marketing park-related opportunities by distributing inquiry lists.
- Participate in a community's special events in such a way that benefits result for the community and the area's economies.
- Continue to nurture cooperating associations that can raise money through the sale of goods, the provision of services, or the collection of donations. Funds can thus be collected that can be applied to park projects that would not otherwise be funded.
- Work with the private sector to understand its perspectives and needs, as well as explaining the governments perspective, i.e., form a partnership relationship.

Of course, there will be as many ways to approach this subject as there are parks. The desire here is to raise the need for an attitude shift by the government toward a more entrepreneurial culture

in parks management so that more economic benefits may be generated for more people.

Some recent discussions have centered around establishing a parks commission for Ontario. This body would be similar to the Niagara Parks Commission, where a board of directors makes policy decisions and the organization is self-funding. In other words, revenues generated by parks would be spent on their operation, rather than going into the government's consolidated revenues and being used at part of the provincial budget.

The idea of a parks commission may be a suitable vehicle to draw attention to the issue of potential economic benefits available from parks.

IS ECOTOURISM A FAD?

The terms and concepts of ecotourism are not yet well known in northwestern Ontario. Some people feel it is simply a new name for tourism. Others are of the opinion that it is a fad. However, an important service can be provided by exploring and implementing the concept. In the definition used here, ecotourism included traditional forest-based tourism, pure ecotourism, or a combination of the two. Attention to the concept of ecotourism can encourage communities and individuals to move toward the combined view, and result in a broader range of activities being offered. Attention to ecotourism can focus attention on questions such as:

- Because fishing is an important attraction, can it be done in such a way that people can also do other things? Also, can the sustainability of the fish stocks be maintained?
- How can accommodations and services be made suitable for a wider range of clientele, including couples, families, and groups of men?
- What other kinds of potential customers are there? What kinds of activities are they looking for and how can they be reached?
- How can more value be added to present activities?
- How can people be educated to show care and respect for the natural environment?
- How can learning activities about the natural world and/or a community's culture and history be incorporated?
- How can tourists be encouraged to put something back that helps to protect the environment that they enjoy?

One of the key differences between the Canadian and American communities studied was the range of activities available to tourists. A focus on ecotourism may be a useful catalyst to help broaden this range. To emphasize a point made earlier, while it seems unlikely that many entrepreneurs or communities will be sustained by ecotourism alone, but adding some such activities will broaden the range of opportunities available and therefore the overall attractiveness of the destination.

The term "ecotourism" may be replaced by another term but, by then, some of the concepts of ecotourism may be included in the general understanding of tourism.

CONCLUSIONS AND RECOMMENDATIONS

This research project set out to answer the question:

"Under what conditions does ecotourism represent a valid, sustainable, economic development opportunity for communities in northwestern Ontario?"

In its simplest form, the answer to the question would be:

- when the community has the desire (as indicated by their effort) to move in that direction; and
- when the combined natural, historical, or cultural features are significant enough to attract people from a considerable distance.

A key point to reiterate is that in most situations ecotourism can be an important contributor to diversifying a community's economy. Cases in which it could be the economic mainstay of a community will be few.

The following recommendations develop the answer more fully, and suggest ways in which the potential of ecotourism can be achieved:

1. Where is government investment in ecotourism best placed?

Clearly, not all communities are well suited for ecotourism, nor is there a large enough market or sufficient government or private sector money available to attempt to carry out ecotourism in all communities. In the view of the authors, the following criteria can be useful in determining which communities to support:

- The community has done all it can to develop its own "Factors for Community Success in Ecotourism", particularly regarding the desire to be involved in ecotourism, and the development of local leaders and planners.
- The community is located adjacent to a world-scale, or at least regionally important, ecotourism destination or to an area that could be so developed.
- Multistakeholder planning processes are in place, and the advisory committees can make recommendations that are in the best long-term interests of all user groups.
- Significant benefits to the community could result from diversifying the range of tourism activities.

2. Public involvement in natural resource planning on Crown and park lands

In many northwestern Ontario communities, discussions are on-going concerning community involvement in planning natural resource management. Each community must deal with issues that may be specific to the area.

Armstrong:

- Would the establishment of a "community forest" help the community to balance the allocation of surrounding economic resources for optimum local benefit?
- How can those involved in tourism be actively involved in planning for resource use, rather than reacting to timber management plans?
- Can the Armstrong Resource Development Corporation adequately broaden its area of influence to include tourism development?

Atikokan:

- Would a broad-based and broadly focused citizen advisory committee to Quetico Provincial Park provide useful assistance in planning for implementation of a park management plan?
- In establishing citizen advisory committees for forest management units, what is the best makeup of the committee? Should stakeholders with vested interests be allowed on these committees?
- Would an ecotourism subcommittee of the Atikokan Community Incentives Corporation help the community to develop ecotourism opportunities?

Rosspport:

- What should be the range of powers of the Rosspport Islands Management board? How can this board best work with the Ontario Ministry of Natural Resources and private land holders in its stewardship role?
- How can planning on the mainland be best done in a nonmunicipal structure? Can the Rosspport Area Conservation and Development Group be the catalyst?

In the authors' opinion, meaningful community involvement in natural resource management issues is necessary for the development of ecotourism as a valuable part of a diversified economy. Multi-stakeholder committee participation and problem solving are the key. These committees can be cumbersome, slow, and at times expensive in the short term, but the alternatives are worse. Over the long term, committees hold more promise for finding the "best solution" than does any other mechanism yet devised.

The specific nature of the committees must be determined locally. It is important that their form style be developed in a locally appropriate way, rather than using a senior government top-down approach.

It is the view of the authors that there will be a relationship between the amount of local economic benefits derived and the degree of local involvement in planning and decision making.

3. Diversified economies require diversified planning

The recently accepted Ontario Forest Policy Framework makes clear the necessity of managing provincial forests for those 12 values viewed as most important. These values are:

Strategic objectives for forest sustainability

- biological diversity
- heritage forest land
- conservation and enhancement of water, air, and soil

Strategic objectives for community and resource use sustainability

Material values:

- employment
- fiber and wood
- fur, food, and other renewable resources
- investment

- revenue
 - tourism
- Social values:
- cultural and spiritual fulfilment
 - knowledge and understanding
 - recreation.

While these 12 values should be kept in mind when dealing with every hectare of land, a wide variety of decisions can be made. It is critically important that:

- sustainability be the primary concern;
- planning processes deal effectively with all values;
- there be meaningful involvement of people with concerns about all of the values;
- that the community's sense of direction for itself plays a role in determining how the resources are used; and
- planning and land use decisions be made on the basis of sound information (which has to date been very weak for the tourism industry).

The involvement of multistakeholder groups is one way of ensuring that planning and decision-making processes deal appropriately with all values. Using a framework such as this can also help to ensure that forest use supports diversified community economies.

4. Development of the information base for decision making

Little factual information exists about the economic impact of tourism in the three communities studied, and this problem appears to be widespread. As a result, it is difficult for either local people or government officials to make sound decisions about how to best diversify the economy and how to make the best use of available resources over the long term. Government support and initiative will be needed to help develop an information base for strategic planning and decision making.

5. Tourism development in unorganized communities and adjacent to parks

Tourism development in both Armstrong and Rosspport is hindered by the fact that they are unorganized communities and have no effective means of planning or acting in concert. For the present, attention should be given to establishing tourism development zones in such towns. Also, areas adjacent to national or provincial parks may be particularly well suited to the development of a tourism infrastructure. It would appear to be most sound to vest control and local leadership in a committee that combines the features of the Armstrong Resource Development Corporation or of the Rosspport Area Conservation and Development Group. An enhanced ability to carry out planning would also be necessary.

6. Wilderness tourism industry association needed

For ecotourism to flourish in the region, a nongovernment body is needed to provide peer support, education, marketing, and lobbying activities. This is a role that could be suited to the Northern Ontario Tourist Outfitters Association, or a new organization could be established.

7. Senior government research support

The next decade is likely to be a turbulent time for the economy of northern Ontario. Many avenues will need to be pursued to maintain the viability of economically shaky communities. Some of the types of research support required to contribute to generating economic benefits from ecotourism will include:

- evaluation of community-based multi-stakeholder advisory committees as mechanisms to provide the support needed by ecotourism and other forest-based industries;
- development of information bases that make it possible to use long-term economics as one of the criteria for making land use decisions;
- more comparative analysis to better understand the key factors, from the community perspective, which are needed to support ecotourism;
- investigation of possible collaborative marketing and referral mechanisms for small ecotourism businesses;
- review of possible ways to achieve community consensus on preferred economic paths;
- review of key elements needed to develop a diversified economic base; and
- review of the impact of provincial resource management and economic development policies on the development of ecotourism opportunities.

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APPENDIX A. BACKGROUND INFORMATION ON ARMSTRONG, ONTARIO.

A1. ARMSTRONG LABOR FORCE

Census data is not available for Armstrong because it is not a municipality, and there are no other readily accessible reliable estimates of its labor force. The following tables describe employment by sector for unorganized communities in the Thunder Bay District. Table A1.1 provides a comparison among 1981, 1986, and 1991. Table A1.2 provides a more detailed breakdown for 1991 only.

Table A1.1. Labor force by industry sector, Thunder Bay District unorganized communities.

	1981	1986	1991	Percent change 1981-1986	Percent change 1986-1991	Percent change 1981-1991
Total labor force	3 605	3 815	4 110	8	14	
All industries	3 580	3 755	4 030	5	7	13
Primary	710	640	485	-10	-24	-32
Manufacturing	610	545	565	-11	4	-7
Construction	210	235	330	12	40	57
Transportation, communication, other utilities	475	545	515	15	-6	8
Trade	430	435	470	1	8	9
Finance, insurance, real estate	35	80	80	129	--	129
Other services	830	990	1 150	19	16	39
Public administration	280	275	415	-2	51	48

Source: Statistics Canada

Table A1.2. Labor force by industry sector, Thunder Bay District unorganized communities.

	1991	Percent of all industries 1991
Total labor force age 15 years and over	4 110	--
All industries	4 030	--
Agricultural and related service	80	2
Fishing and trapping	25	1
Logging and forestry	255	6
Mining (including milling), quarrying, and oil	125	3
Manufacturing	565	14
Construction	330	8
Transportation and storage	355	9
Communication	160	4
Wholesale trade	120	3
Retail trade	355	9
Finance and insurance	50	1
Real estate operator and insurance agent	30	1
Business service	110	3
Government service	415	10
Educational service	290	7
Health and social service	215	5
Accommodation, food, and beverage	310	8
Other service	225	6

Source: Statistics Canada

A2. ARMSTRONG WORKSHOP: WHAT ROLE CAN ECOTOURISM PLAY IN A DIVERSIFIED ECONOMY?

The following notes are from a public meeting held in Armstrong on 14 October 1993. These notes (from the flipcharts) provide a summary of the discussions.

Ecotourism Opportunities In Armstrong

- create an image of Armstrong as a gateway at the end of the road;
- take advantage of the fact that Armstrong has remote lakes that are not available elsewhere;
- wilderness is the main product, but there may also be secondary products;
- ecotourism is least likely in May and June, when fishermen are the main clientele. It may be more likely in July and August when more families, with broader interests, are traveling;
- expand Wabakimi Park into a world-class attraction;
- build on the cultural heritage of the community, e.g., Pine Tree Line radar base; prisoner of war camps; and the fact that Armstrong was a stop for Trans Canada Airlines on its transcontinental flights;
- build on the cultural heritage of the White Sands Indian Band;
- the main value is wilderness, but the question is how to capitalize on it and ensure its survival. A Wabakimi Park expansion may be the best way to ensure this;
- Armstrong has an excellent airport, which is an asset that could be built on;
- develop an interpretive center and campground, accessible only through Armstrong, as a gateway to Wabakimi;
- there is room to expand. A marina, an American Plan resort, and cottages for rent are required;
- carry out an historical inventory (talk to the elderly), including Wendall Beckwith's hermitage on Whitewater Lake; the Pine Tree Line (radar base); the airport; and prisoner of war camps at Fee Spur, Camp 63, and Castle Lake;
- organize winter trips that are more expedition oriented, even for short periods of time, e.g., the March break. Dogsledding, snowmobiling, cross-country skiing, snowshoeing, snowmobile safaris, ice fishing, and hut-to-hut travel could be provided;
- winter aerial photography or aerial telemetry expeditions to see wolves and caribou: participate, learn, and contribute to science;
- establish a conservation authority;
- native powwows;
- possibly an arts/crafts theme;
- educate tourists about logging and forest management;
- there is an opportunity to "add-in" instead of "add-on" (in other words, enrich the experience);
- provide more value for inexperienced guests from urban centers who come by airplane;

- build an east/west road from Armstrong to Geraldton (thus completing a Lake Nipigon Circle Tour route; use of the CN rail bed);
- establish co-op programs in schools on tourism; and
- tourism is the business of "exporting memories".

Challenges Armstrong would face in moving to ecotourism include:

The general feeling was that any development (such as ecotourism) is worth looking into. At the same time there are some real challenges to moving in that direction:

- clientele would be mostly very different. How are those people attracted;
- ecotourism requires more staff. It is already difficult to find staff locally. Where would staff be found? (Changes in the provincial economy may cause social insurance payments to be reduced, which may mean more people will be looking for employment);
- even though it helps over the long term, ecotourism takes time to develop;
- the town of Armstrong needs to be cleaned up, advertised, and promoted;
- the community needs leaders to promote tourism development;
- the community doesn't appear very interested in tourism; local businesses don't try to attract tourists; the community and the country don't seem to value foreign tourists;
- tourism could benefit the town by establishing community pride, instilling a sense of community, and enhancing recreational and possibly educational opportunities;
- it would be helpful if Armstrong worked as a community to attract tourists, in addition to individual operator efforts;
- tourist industry people would have to relate differently to nonconsumptive tourists as compared to consumptive ones;
- as an unorganized community, Armstrong has a difficult time planning future development;
- there are few service industries that cater to tourist operators or tourists;
- in other "end of the road" communities, such as Pickle Lake and Nakina, there are more services available than in Armstrong;
- it is very difficult to make money from canoeists, because many are "do-it-yourselfers" who bring their own gear and food, yet they deplete the finite wilderness values; and
- tourist operators are concerned with present and potential problems of logging and access roads.

A3. OPPORTUNITY ASSESSMENT CRITERIA FOR ARMSTRONG.

Market potential	Low, <10 percent increase Medium, 11 to 25 percent increase High, 26 to 50 percent increase Very high, >50 percent increase
Compatibility with existing activities, businesses, etc.	Low, medium, high
Commercial spinoffs/benefits	Low, medium, high
Employment potential	Low, 0 to 4 Medium, 5 to 10 High, 10 or more jobs
Capital costs	Low, < \$100,000 Medium, \$100,001 to \$250,000 High, \$250,001 to \$500,000 Very high, > \$500,001
Public sector funding required	Yes, no
Potential for public sector funding	Low, medium, high
Private sector investment required	Yes, no
Potential for private sector investment priority	Low, medium, high Low, action within 5 years Medium, action within 3 to 5 years High, action within 1 to 3 years Very high, action immediately

A4. OPPORTUNITY ASSESSMENT MATRIX FOR ARMSTRONG.*

	Gateway to Wabakimi Park	Cultural/ historical inventory	Winter activities	Caribou center	Native powwows	Expanded outfitting
Market potential	VH	M	M	M	M	VH
Compatibility	H	H	H	H	H	H
Commercial spinoffs/benefits	VH	M	H	H	M	VH
Employment potential	H	L	H	M	L	H
Capital costs	VH		VH	H		H
Public sector funding required	YES	YES		YES	YES	
Potential for public sector funding						
Private sector investment required			YES			YES
Potential for private sector investment						H
Priority	VH	H	H	H	H	VH

* L=low, M=medium, H=high, VH=very high.

A5. SAMPLE FORM: METHODS FOR INCREASING THE LEVEL OF TOURISM AND RELATED EXPENDITURES IN ARMSTRONG.

Potential effectiveness Practicality Priority

- Attracting more visitors
- Targeting niche markets
- Extending length of stay
- Increasing per party per day expenditures
- Extending season (shoulder, winter)
- New activities
- More shopping
- Improved services
- Improved marketing/promotion

Potential effectiveness Ineffective = no change
 Effective = up to a 10% increase
 Very effective = 11 to 25% increase
 Extremely effective = > 25% increase

Practicality Very difficult = 1
 Very easy = 5

Priority 0 = don't bother
 5 = high priority/worth a lot of effort

A6. KEY RESPONDENTS: ARMSTRONG.

Gail Ballak	Armstrong Area Forester, OMNR
Peter Boersma	Outward Bound Wilderness School
Glen Campbell	Manager, Hanger 557
Bernie Cox	Owner, Holinshead Lake Outfitters
Doug Duff	Owner/Manager, Mackenzie Inn
Rudy Ebert	Owner, Ogoki Frontier and Ogoki Fly Ins
Annette Elliot	Owner, Mattice Lake Outfitters
Don Elliot	Owner, Mattice Lake Outfitters
Carol Massaro	Owner, Armstrong Outposts and Air Service
Ron Massaro	Owner, Armstrong Outposts and Air Service
Blair McCullough	Acting Area Manager, OMNR
Kathy Morgan	Armstrong Resources Development Corporation
Joy Neill	Owner, Jullien Nurseries
Donna Nicol	Owner, Huron Air and Outfitters, Hanger 557
Don Plumridge	Owner, Waweig Lake Outfitters
Aino Plumridge	Owner, Waweig Lake Outfitters
Pat Waltho	Community Legal Clinic
Gary Waltho	Armstrong Regional Development Corp.
Wes Werbowy	Owner, Camp Caribou

Also responding was a selection of tourists from a variety of places: including, Thunder Bay; Blacksburg, Virginia; Rockland, Massachusetts; Hawaii; Minneapolis, Minnesota; and Switzerland.

A7. WORKSHOP 1 PARTICIPANTS: ARMSTRONG.

Peter Cheeseman
Gary Haggins
Gary Waltho

Don Elliot
Dan Mogck
Pat Waltho

James Ferguson
Donna Nicol
Wes Werbowy

A8. WORKSHOP 2 PARTICIPANTS: ARMSTRONG.

Gail Ballak
Niels Carl
Joy Neill
Don Plumridge
Gary Waltho
Ernie Wanakamik

APPENDIX B. BACKGROUND INFORMATION ON ATIKOKAN.

B1. ATIKOKAN LABOR FORCE

Table B1.1 describes the Town of Atikokan's labor force by industry sector in 1981, 1986, and 1991. Table B1.2 provides a more detailed breakdown for 1991 only.

Table B1.1. Labor force by industry sector in Atikokan.

	1981	1986	1991	Percent change (1981-1986)	Percent change (1986-1991)	Percent change (1981-1991)
Total labor force	2 095	2 225	2 045	6	-8	-2
All industries	2 065	2 155	2 015	4	-6	-2
Primary	330	305	190	-8	-38	-42
Manufacturing	280	420	330	50	-21	18
Construction	205	95	90	-54	-5	-56
Transportation, communication, other utilities	225	230	160	2	-30	-29
Trade	250	260	245	4	-6	-2
Finance, insurance real estate	35	55	65	57	18	86
Other services	530	605	715	14	18	35
Public administration	205	175	200	-15	14	-2

Source: Statistics Canada

Table B1.2. Labor force by industry sector in Atikokan.

	1991	Percent of all industries 1991
Total labor force 15 years and over	2045	--
All Industries	2015	--
Agricultural and related service	0	0
Fishing and trapping	0	0
Logging and forestry	160	8
Mining (including milling), quarrying, and oil	30	1
Manufacturing	330	16
Construction	90	4
Transportation and storage	65	3
Communication	95	5
Wholesale trade	30	1
Retail trade	215	11
Finance and insurance	45	2
Real estate operator and insurance agent	20	1
Business service	25	1
Government service	200	10
Educational service	200	10
Health and social service	200	10
Accommodation, food, and beverage	235	12
Other service	55	3

Source: Statistics Canada

B2. ATIKOKAN VISITOR INFORMATION CENTER, 1993.

Canadian visitors	May	June	July	August	September	Total
Alberta		16	72	138	9	235
British Columbia		42	69	152	13	276
Newfoundland			3	3		6
Manitoba		108	218	233	23	582
Maritimes		5	29	6	1	41
Northwest Territories			2		4	6
Northwestern Ontario						*
Ontario		441	1 066	1 176	159	2 842
Quebec		7	39	56	2	104
Saskatchewan		6	53	32	3	94
Yukon			1			1
Subtotal		625	1 552	1 796	214	4 187
United States visitors						
Subtotal		645	877	965	209	2 696
Overseas visitors						
United Kingdom		7	9	26	2	44
France					8	8
Germany		10	23	42	9	84
Other Europe		7	12	62	10	91
Asia					1	1
Elsewhere				11	3	14
Subtotal		24	44	141	33	242
TOTAL		1 294	2 473	2 902	456	7 125

Source: Sunset Country Tourism Association, Kenora, Ontario.

* Note: Northwestern Ontario is included in the Ontario total.

**B3. REGIONAL ECONOMIC IMPACT MODEL (REIM): ONTARIO 3.2
ONTARIO MINISTRY OF NATURAL RESOURCES—FOREST VALUES.**

Provincewide Impact

Quetico Provincial Park

Results of the combination of the elements

Year of Expenditure: 1992 Units: Dollars

	Direct	Impact Indirect and Induced	Total
Value added (GPT)	\$1,504,479	\$2,371,480	\$3,875,859
Gross sales	\$2,291,055	\$2,433,636	\$4,724,691
Wages and salaries	\$1,195,702	\$1,496,159	\$2,691,861
Employment-person years	32.8	44.1	76.9
Initial expenditure			\$2,291,055

Inter-regional Impact

Quetico Provincial Park

Results of the combination of the elements

Year of expenditure: 1992 Units: Dollars

Region	Income	Gross Output	Labor Income Emp.	(P.Y.)
Northwest Region	\$2,528,698	2,438,213	\$1,814,855	50.6
Northeast Region	138,353	235,417	89,142	2.5
Central Region	124,501	206,515	76,709	2.5
Southern Region	1,084,307	1,844,546	711,156	21.3
Total	\$3,875,859	\$4,724,691	\$2,691,861	76.9

B4. GLOSSARY OF TERMS FOR REIM: ONTARIO.

- Gross output:** This is the total value of goods and services (gross sales) sold by businesses during the year in sustaining the project's normal year operations. Direct sales include all the value of goods and services bought for on-site operations. They include only a portion of the revenues of the activity. Excluded are taxes, depreciation, wages and salaries, and net profits. Total sales include all the turnover of goods and services needed to sustain the activity.
- Value added:
(or income)** This is a measure of net output. It avoids double counting of products sold during the accounting period by including only final goods. For instance, chairs are included, but the wood that goes into making them does not appear separately. It is equal to income (GPT). It may be calculated by adding wages, interest, rent, and profits. Alternatively, it is equal to revenues minus the total cost of purchased inputs.
- Labor income:** This is the wages and salaries component of income.
- Multipliers:** This is a measure derived by adding direct, indirect, and induced effects (total) and dividing the total thus derived by the original expenditures (revenue). For instance, the income multiplier associated with a given activity is equal to total income divided by the original revenue. Only the employment multiplier is calculated differently. The latter is generated by dividing total employment by direct employment. This difference is necessitated by the fact that using the general definition for employment would result in dividing employment in person-years by dollars of revenue. This would not yield a unitless measure, which the multiplier must be.
- Taxes:** The model includes a number of taxes; each is linked directly to the level of government receiving it. For example, tariffs on imports are received only by the federal government, whereas business and property taxes are received solely by local (municipal) governments. However, corporate profit taxes and personal income taxes are shared between the federal and provincial governments.
- Glossary of terms**
- Consumption:** The value of goods and services used by households.
- Disposable income:** Total household income net of personal income taxes.
- Employment:** The amount of labor time used in production, measured in person-years.

Labor income:	The total value of wage and salary payments to employees, and unincorporated income.
Income:	The total value of payments to productive factors. It represents the sum total of wages and salaries, interest payments, rent, and profits.
Output:	The total value of goods and services produced. It is also referred to as value of shipments. It includes final as well as intermediate output.
Productive factors:	Basic resources used in production, including labor, natural resources and capital.
Final output:	Output of the economy that will not undergo further processing in the economy.
Intermediate output:	Output of the economy that will be used for further processing in the economy.
Investment:	Spending on new capital goods, including equipment, structures, and inventories.
Value-added:	The value of output net of the value of intermediate inputs. Value-added is equal to the income generated in production.
Wage value-added:	Labor income associated with production.

B5. ATIKOKAN WORKSHOP ON ECOTOURISM: WHAT ROLE CAN IT PLAY IN A DIVERSIFIED ECONOMY?

The following are notes from a public meeting held in Atikokan on 27 October 1993. These notes (from the flipcharts) are a summary of the discussions.

Ecotourism Opportunities In Atikokan

Small group discussions generated many ideas. Through a prioritizing process the following ideas were seen by the group as having the most potential:

- Interpretive bear (or other featured wildlife species) center;
- Fish hatchery and interpretive center;
- converting the Quetico Center facilities into a hotel or tourism training school;
- cross-country and hiking trails with a hut-to-hut option;
- mining attraction;
- Shevlin Clarke Locomotive Tours and Museum;
- rockhounding; and
- more guided outfitting to Quetico Provincial Park.

The total list of all additional opportunities identified were:

- river boat cruises;
- lynx center;
- repatriate the Quetico Provincial Park quota;
- low impact winter recreation, e.g., cross-country skiing and dogsledding;
- birding;
- soft wilderness canoe trips;
- soft wilderness auto route;
- high profile industrial park;
- fall colors;
- meteor showers;
- cycling tours—promote, service existing cyclists;
- open pit mine reclamation;
- park management/resource management education;
- tours of mills;
- resource extraction tours;
- Greenwood, White Otter, Premier Lakes red pine and white pine tours;
- water park at Steep Rock Lake;
- cowboy town;
- berry picking expedition;
- railroad town;
- market "Canada";
- ice climbing;
- hunting and fishing;
- snowmobiling;

- ski hill;
- manufacturers, parks, and tours, e.g., canoes, paddles;
- cottaging;
- hiking—with and without accommodation;
- naming highways, e.g., White Otter Way;
- car tours with audio tapes, e.g., Atikokan to Armstrong, circle route around the Boundary Waters and Quetico Provincial Park;
- walking tapes, e.g., Hwy 622 to Upsala;
- events that promote natural environment, e.g., biological triathlon, running, canoeing, biking;
- salmon fish farm;
- geological expeditions;
- another way in/out of town;
- enhance image of town;
- mountain biking at the mine site;
- dirt biking;
- promote our diverse forest;
- native cultural center;
- attract big city folks' money;
- school for herbalists;
- arts in the wilderness;
- mountain climbing at the mine site;
- Outward Bound—wilderness;
- outdoor correctional facility;
- nonelitist developments made available to the entire community; and
- health and leisure programs.

Barriers And Ways To Overcome Them

The barriers are written in regular print. Some suggestions for ways to overcome them are written in **bold**.

- Hut-to-hut skiing:
 - break-ins at huts, liability of clients;
 - power/heat—**solar**;
 - plumbing—**composting toilets**;
- No lake front—**utilize the Atikokan River**;
- Ugly entrance to town—**move industrial businesses to the industrial mall**;
- Community culture is not conducive to ecotourism;
- No scheduled air service—**discuss possibilities with Bearskin Airlines**;
- No native elders;
- No accessible conference center—**examine options for Quetico Center**;
- Lack of service skills;
- Lack of good employees—**attract outsiders and provide training**;
- Safety in the bush—**radio phone**;

- Invisible highway turn-off—**better signage;**
- Need for at least one high-quality restaurant; and
- Availability of gas—in the winter months after 8:00 p.m., the distance is 158 km—**post sign.**

One group focused their discussion on barriers and how to overcome them on some of the high priority possibilities that were identified:

Fish hatchery and interpretive center

- Relocation of salmon, potential disasters like tidal wave due to mine pit walls slumping
Identify site, obtain permits and permission, and plan to eliminate hazards.

Interpretive bear center

- Capital
Start small, pursue grants and other funding, use new technology, and coordinate with fish hatchery interpretive center.

Quetico Center converted to a hotel, school, or tourism training facility

- Capital, competition, distance.
Top notch graduates, advertising, quality program, and practical program.

Shevlin Clarke Locomotive Tours And Museum

- Cost of tracks, marketing ridership
Utilize spur to Atikokan Generating Station

High profile industrial park

- Adequate sales, environmental problems, air quality, quality tour guides, convenience.
- **Establish tours at specified times and network among manufacturers.**

Cross country skiing

- Lack of groomed trails, cooperation from snowmobile operators.
Establish trails, work with snowmobile club, and arrange to borrow a trail grooming machine.

B6. ATIKOKAN OPPORTUNITY ASSESSMENT CRITERIA.

Market potential	Low, <10 percent increase Medium, 11 to 25 percent increase High, 26 to 50 percent increase Very high, - >50 percent increase
Compatibility with existing activities, businesses, etc.	Low, medium, high
Commercial spinoffs/benefits	Low, medium, high
Employment potential	Low, 0 to 4 Medium, 5 to 10 High, 10 or more jobs
Capital costs	Low, <\$100,000 Medium, \$100,001 to \$250,000 High, \$250,001 to \$500,000 Very high, >\$500,001
Public sector funding required	Yes, no
Potential for public sector funding	Low, medium, high
Private sector investment required	Yes, no
Potential for private sector investment	Low, medium, high
Priority	Low, action within 5 years Medium, action within 3 to 5 years High, action within 1 to 3 years Very high, action immediately

B7-A. OPPORTUNITY ASSESSMENT MATRIX FOR ATIKOKAN.*

	Bear Center	Mining attraction	White Otter Castle	Nonmotorized guided outfitting	Locomotive tours/museum
Market potential	H	H	H	VH	M
Compatibility	H	H	H	VH	M
Commercial spinoffs/benefits	H	H	H	VH	M
Employment potential	M	M	M	VH	M
Capital costs	VH	VH	H	M	VH
Public sector funding required	Yes	Yes	Yes		Yes
Potential for public sector funding					
Private sector investment required					Yes
Potential for private sector investment					
Priority	H	H	H	VH	M

* M=medium, H=high, VH=very high.

B7-B. OPPORTUNITY ASSESSMENT MATRIX FOR ATIKOKAN.*

	Atikokan/ Minaki waterway	Rock- hounding	Snowmobile trails	Cross country hiking trails	Quetico Center	Fish hatchery
Market potential	H	L	H	M	M	L
Compatibility	M	H	H	H	M	H
Commercial spinoffs/benefits	H	M	H	M	M	L
Employment potential	L	L	M	M	H	L
Capital costs	VH	L	H	M	VH	VH
Public sector funding required	YES		YES	YES	YES	YES
Potential for pub. sector funding						
Private sector investment required					YES	
Potential for private sector investment						
Priority	M	H	M	M	M	L

* M=medium, H=high, VH=very high.

B8. SAMPLE FORM: METHODS FOR INCREASING THE LEVEL OF TOURISM AND RELATED EXPENDITURES IN ATIKOKAN.

	Potential effectiveness	Practicality
Priority		
Attracting more visitors		
Targeting niche markets		
Extending length of stay		
Increasing per party per day expenditures		
Extending season (shoulder, winter)		
New activities		
More shopping		
Improved services		
Improved marketing/promotion		
Potential effectiveness	Ineffective - No change Effective - Up to a 10 percent increase Very effective - 11 to 25 percent increase Extremely effective - More than 25 percent increase	
Practicality	Very difficult - 1 Very easy - 5	
Priority	0 - Don't bother 5 - High priority/worth a lot of effort	

B9. KEY RESPONDENTS: ATIKOKAN.

Andrea Allison	Ridley Library, Quetico Park
Joerg Boileau	Atikokan Chamber of Commerce
Linda Braun	Atikokan Chamber of Commerce
Jim Clark	Owner, Canoe Canada Outfitters
Ted Couch	Atikokan Economic Development Corp.
Bobby Davidson	Reeve
Bud Dickson	Owner, Canoe Canada Outfitters
Dave Elder	Area Manager - Flanders, OMNR
Dennis Fredrickson	Owner, Soft Wilderness Tours
Mary Kerr	Former outfitter
Jay Leather	Superintendent, Quetico Park, MNR
Don MacKay	Teacher of high school tourism course, Atikokan
Gary McKinnon	Atikokan Economic Development Corporation
Chuck Miller	Quetico Park, OMNR
Shirley Peruniak	Quetico Park, OMNR
Vic Prokopchuk	Owner, Four Seasons Travel
Keith Robinson	Owner, Souris River Canoes Ltd.
John Stradiotto	Owner, Quetico Wilderness Canoe Trips
Charlie Thomas	Volunteer staff, Atikokan Tourist Information Center

A sample of tourists from a variety of places was also interviewed, including Ohio; St. Paul, Minneapolis, Minnesota; and Toronto and Sault Ste. Marie, Ontario.

B10. WORKSHOP 1 PARTICIPANTS: ATIKOKAN.

Bill Beyer
Robert Davidson
Chuck Miller
Warren Paulson
Ange Sponchia
Charlie Viddal

Rob Bisset
Gary McKinnon
Karyn Mikoliew
Shirley Pierce
Lorraine Gauthier-Stromberg

Ed Chasty
Mike McKinnon
Glenn Nolan
Keith Robinson
Chris Stromberg

B11. WORKSHOP 2 PARTICIPANTS: ATIKOKAN.

Bill Beyer
Jeff Lehman
Keith Robinson
Anny Wulf

Jacqueline Boileau
Chuck Miller
Jack Russow
Wim Wulf

Gary Kearnan
Glenn Nolan
Charlie Viddal

APPENDIX C. BACKGROUND INFORMATION ON ROSSPORT.

C1. Rossport Area Labor Force

Census data for Rossport is not available. Tables illustrating the Terrace Bay, Schreiber and Thunder Bay District labor force estimates probably provide reasonable indications of Rossport's labour force. Tables C1.1, C1.2, and C1.3, provide a comparison of labor force data for 1981, 1986, and 1991 respectively. Tables C1.4, C1.5, and C1.6, provide a more detailed breakdown for 1991 only.

Table C1.1. Labor force by industry sector for unorganized communities in Thunder Bay district.

	1981	1986	1991	percent change 1981-1986	percent change 1986-1991	percent change 1981-1991
Total labor force	3 605	3 815	4 110	6	8	14
All industries	3 580	3 755	4030	5	7	13
Primary	710	640	485	-10	-24	-32
Manufacturing	610	545	565	-11	4	-7
Construction	210	235	330	12	40	57
Transportation Communication, Other utilities	475	545	515	15	-6	8
Trade	430	435	470	1	8	9
Finance, insurance						
Real estate	35	80	80	129	--	129
Other services	830	990	1150	19	16	39
Public administration	280	275	415	-2	51	48

Source: Statistics Canada

Table C1.2. Labor force by industry sector in Schreiber.

	1981	1986	1991	percent change 1981-1986	percent change 1986-1991	percent change 1981-1991
Total labor force	930	930	1 035	--	11	11
All industries	930	930	1 035	--	11	11
Primary	30	15	75	-50	400	150
Manufacturing	230	260	200	13	-23	-13
Construction	10	--	--	-100	--	-100
Transportation Communication, Other utilities	240	255	255	6	--	6
Trade	200	145	195	-28	34	-3
Finance, insurance Real estate	15	10	15	-33	50	--
Other services	170	190	215	12	13	26
Public administration	35	50	80	43	60	128

Source: Statistics Canada

Table C1.3. Labor force by industry sector in Terrace Bay.

	1981	1986	1991	percent change 1981-1986	percent change 1986-1991	percent change 1981-1991
Total labor force	1 410	1 595	1 320	13	-17	-6
All industries	1 400	1 590	1 300	14	-18	-7
Primary	20	30	65	50	117	225
Manufacturing	810	895	605	10	-32	25
Construction	40	25	40	-38	-60	--
Transportation Communication, Other utilities	20	40	40	100	--	100
Trade	115	145	105	26	-29	-9
Finance, insurance Real estate	25	5	30	-80	500	20
Other services	300	390	340	30	-13	-13
Public administration	80	55	70	-31	27	-13

Source: Statistics Canada

Table C1.4. Labor force by industry sector unorganized communities in Thunder Bay district.

	1991	percent of all industries 1991
Total labor force 15 years and over	4 110	--
All Industries	4 030	--
Agricultural and related service	80	2
Fishing and trapping	25	1
Logging and forestry	255	6
Mining (incl. milling), quarrying and oil	125	3
Manufacturing	565	14
Construction	330	8
Transportation and storage	355	9
Communication	160	4
Wholesale trade	120	3
Retail trade	355	9
Finance and insurance	50	1
Real estate operator and insurance agent	30	1
Business service	110	3
Government service	415	10
Educational service	290	7
Health and social service	215	5
Accommodation, food and beverage	310	8
Other service	225	6

Source: Statistics Canada

Table C1.5. Labor force by industry sector in Schreiber.

	1991	percent of all industries 1991
Total labor force 15 years and over	1 035	--
All Industries	1 035	--
Agricultural and related service	0	0
Fishing and trapping	0	0
Logging and forestry	15	1
Mining (incl. milling), quarrying and oil	60	6
Manufacturing	200	19
Construction	0	0
Transportation and storage	235	23
Communication	20	2
Wholesale trade	10	1
Retail trade	185	18
Finance and insurance	15	1
Real estate operator and insurance agent	0	0
Business service		
Government service	80	8
Educational service	90	9
Health and social service	35	3
Accommodation, food and beverage	60	6
Other service	30	3

Source: Statistics Canada

Table C1.6. Labor force by industry sector in Terrace Bay.

	1991	percent of all industries 1991
Total labor force 15 years and over	1 320	--
All Industries	1 300	--
Agricultural and related service	0	0
Fishing and trapping	0	0
Logging and forestry	0	0
Mining (incl. milling), quarrying and oil	65	5
Manufacturing	605	47
Construction	40	3
Transportation and storage	40	3
Communication	0	0
Wholesale trade	0	0
Retail trade	105	8
Finance and insurance	20	2
Real estate operator and insurance agent	10	1
Business service	10	1
Government service	70	5
Educational service	80	6
Health and social service	125	10
Accommodation, food and beverage	60	5
Other service	65	5

Source: Statistics Canada

C2. TERRACE BAY VISITOR INFORMATION CENTER STATISTICS FOR 1993.

	May	June	July	August	September	Total
Canadian visitors						
Alberta	16	29	129	110	41	325
British Columbia	28	49	80	199	17	373
Newfoundland	6		10	4	1	21
Manitoba	11	54	145	130	35	375
Maritimes	6	11	111	54	7	189
North West Territories			4	5		9
North Western Ontario	140	311	695	547	117	1 810
Ontario	185	414	1 110	937	269	2915
Quebec	22	46	118	65	19	270
Saskatchewan	3	26	74	51	5	159
Yukon	2		5	12		19
Subtotal	419	940	2 481	2 114	511	6 465
American visitors						
Subtotal	61	177	566	865	233	1 902
Overseas visitors						
United Kingdom	3	8	25	13	10	59
France		3	5	7	2	17
Germany	4	3	36	31	12	86
Other (Europe)	4	11	23	18	13	69
Asia		3	6	9	2	20
Elsewhere	2	2	7	24	6	41
Subtotal	13	30	102	102	45	292
TOTAL	493	1147	3149	3081	789	8659

Source: North of Superior Tourism Association, Thunder Bay, Ontario.

C3. NIPIGON VISITOR INFORMATION CENTER STATISTICS FOR 1993.

Canadian visitors	May	June	July	August	September	Total
Alberta	6	35	68	17	21	147
British Columbia	4	49	58	19	31	161
Newfoundland		2	4			6
Manitoba	8	25	74	34	5	146
Maritimes	6	12	31	11	3	63
North Western Territories					6	6
North Western Ontario	12	68	86	55	35	256
Ontario	37	98	265	147	113	660
Quebec	1	16	39	25	8	89
Saskatchewan		14	30	15		59
Yukon		4				4
Subtotal	74	323	655	323	222	1 597
American visitors						
Subtotal	30	209	207	260	166	872
Overseas visitors						
United Kingdom			15		8	23
France			4	5	1	10
Germany	6	25	25	12	6	4
Other (Europe)		16	36	10	9	71
Asia	4	3				7
Elsewhere			2		5	77
Subtotal	10	44	82	27	29	192
TOTAL	114	576	944	610	417	2661

Source: North of Superior Tourism Association, Thunder Bay, Ontario.

**C4. REGIONAL ECONOMIC IMPACT MODEL (REIM): ONTARIO 3.2
 ONTARIO MINISTRY OF NATURAL RESOURCES - FOREST VALUES**

Province Wide Impact

Rainbow Falls

Results of the combination of the elements

Year of Expenditure: 1992

Unit: Dollars

	Impact		
	Direct	Indirect and Induced	Total
Value added	\$406,761	\$620,804	\$1,027,565
Gross sales	\$573,742	\$591,858	\$1,165,600
Wages and salaries	\$342,163	\$389,403	\$ 731,566
Employment (Person-years)	10.4	11.1	21.5
Initial expenditures			\$ 573,742

Interregional Impact

Rainbow Falls

Results of the combination of the elements

Year of Expenditure: 1992

Unit: Dollars

Region	Income	Gross output	Labor income	Employment (person-years)
Northwest Region	\$ 758,161	\$ 714,203	\$557,210	16.4
Northeast Region	\$ 25,138	\$ 42,365	\$ 16,067	0.4
Central Region	\$ 20,129	\$ 32,602	\$ 12,084	0.4
Southern Region	\$ 224,137	\$ 376,430	\$146,204	4.3
Total	\$1,027,565	\$1,165,600	\$731,566	21.5

C5. ROSSPORT WORKSHOP-ECOTOURISM: WHAT ROLE CAN IT PLAY IN A DIVERSIFIED ECONOMY?

The following are notes from a public meeting held in Rosspport on 28 October 1993. These notes (from the flipcharts) are a summary of the discussions.

Ecotourism Opportunities In Rosspport

Small group discussions generated many ideas. Through a prioritizing process the following were seen by the group as having the most potential:

- retreat for artists, with studios and workshops
- museum and information center (possibly in Ronnie's House)
- stock small lakes north of the highway with Aurora trout. This would be an attraction with international appeal
- cross-country skiing with trails connecting to Rainbow Falls, MN.; could include competitions
- snowmobile destination (more accommodation and gas); trials and tours
- dog sled racing
- voyageur excursions - "Be a Voyageur for the Weekend", period dress, role plays
- brochure regarding sensitive areas
- underwater interpretive trail (shipwrecks - using waterproof, self-guided charts or local guides)
- smelt fishing festival
- regular regattas, sponsored by different yacht clubs (Canadian and American) each year
- floating lodge
- kayaking symposium
- photo hunting tours

Following is the total list of all the additional opportunities identified:

- guided or self-guided tours
- boat cruises
- sailing charters
- fishing charter
- tour boats < 25 people
- dinner cruises
- kayak tours and competitions
- trail tours (hiking)
- horse back riding, overnight trail rides
- winter lake walks on Lake Superior - ice tours
- car tours that show the area (the Falls, etc.)
- mountain biking
- dog sledding
- birding and other naturalist tours

- rock/geology tours
- blueberry tours and festival
- bear tours
- fast food concession (not MacDonald's)
- flea markets
- art shows - temporary gallery in hall during summer months or during low periods of use of the hall
- tour train
- ice fishing festival or winter derby
- ice sailing/ice boating
- ice climbing (Kama, Nipigon)
- winter camping
- historic pamphlet
- sailing school
- marina - power and sail boats
- mystique of sunken ships, display and interpretive signage
- diving Ontario shipwrecks, e.g., Mary McLaughlin and Rapahanod
- educational programs for tourists
- bed and breakfasts
- chain saw festival
- island camping on platforms, "green zone" the islands
- writers workshop
- elderhostel
- bike rentals

Barriers And Ways To Overcome Them

Each group took a different approach to this task.

Group 1

1. OMNR
Get more involved with concerns, permits, closed parks
2. Local population
Concern for progress, too commercial, limited island access, seasonal employment
3. Issue of municipality status
View is both positive and negative

Group 2

Barriers to ecotourism

- funding - none or marginal
- lack of volunteers or manpower
- lack of customs clearance in Rossport
- red tape
- detractors (can't please everybody)
- liability
- weather
- no passenger trains
- lack of infrastructure
- lack of docking facilities

Advantages of ecotourism

- protection of resources
- educational
- creates employment in the area
- makes Rossport an interesting place to live
- promotes Rossport and area
- more money being spent locally.

Group 3

Issue: Stocking lakes with Aurora trout

Barriers: Environmental - would need to survey the lake, which may not qualify

An alternative would be to stock with native speckled trout.

C6. ROSSPORT OPPORTUNITY ASSESSMENT CRITERIA.

Market potential	Low - <10 percent increase Medium - 11 to 25 percent increase High - 26 to 50 percent increase Very High - >50 percent increase
Compatibility with existing activities, businesses, etc.	Low, medium, high
Commercial spinoffs/benefits	Low, medium, high
Employment potential	Low - 0 to 4 Medium - 5 to 10 High - 10 or more jobs
Capital costs	Low - < \$100,000 Medium - \$100,001 to \$250,000 High - \$250,001 to \$500,000 Very high - > \$500,000
Public sector funding required	Yes, no
Potential for public sector funding	Low, medium, high
Private sector investment required	Yes, no
Potential for private sector investment	Low, medium, high
Priority	Low - Action within 5 years Medium - Action within 3 to 5 years High - Action within 1 to 3 years Very high - Action immediately

C7. OPPORTUNITY ASSESSMENT MATRIX FOR ROSSPORT.

	Retreat for artists	Museum/ information center	Stock small lakes	Cross- country skiing trails	Snowmobile destination
Market potential	M	M		M	H
Compatibility	H	H		M	VH
Commercial spinoffs/benefits	M	M		H	H
Employment potential	L	L		H	M
Capital costs		M		M	
Public sector funding required		Yes		Yes	Yes
Potential for public sector funding					
Private sector investment required					
Potential for private sector investment					
Priority	M	M		M	VH

VH - Very high: could result in considerable benefits to community
H - High: has above average potential
M - Moderate: same potential for benefits, but not a large amount
L - Low: limited potential benefits

	Dog sled racing	Voyageur excursions	Brochure	Underwater interpretive trail	Smelt fishing festival
Market potential	L	L	H	L	M
Compatibility	H	H	H	H	H
Commercial spinoffs/benefits	L	L	H	M	M
Employment potential	L	L		L	L
Capital costs	L	L	L	L	L
Public sector funding required	Yes		Yes		
Potential for public sector funding					
Private sector investment required			Yes		
Potential for private sector investment					
Priority	VL	VL	H	H	M

VH - Very high: could result in considerable benefits to community
H - High: has above average potential
M - Moderate: same potential for benefits, but not a large amount
L - Low: limited potential benefits

	Regattas	Floating lodge	Kayak symposium	Photo hunting tours	Islands	Marina
Market potential	H		M	M	VH	VH
Compatibility	H		H	H	VH	VH
Commercial spinoffs/benefits	M		M	M	VH	VH
Employment potential	L		L	L	VH	H
Capital costs	L		L	L	VH	VH
Public sector funding required					Yes	Yes
Potential for public sector funding						
Private sector investment required					?	Yes
Potential for private sector investment						
Priority	H		H	H	VH	VH

VH - Very high: could result in considerable benefits to community

H - High: has above average potential

M - Moderate: same potential for benefits, but not a large amount

L - Low: limited potential benefits

? - Unknown

C8. SAMPLE FORM: METHODS FOR INCREASING THE LEVEL OF TOURISM AND RELATED EXPENDITURES IN ROSSPORT.

	Potential effectiveness	Practicality	Priority
Attracting more visitors			
Targeting niche markets			
Extending length of stay			
Increasing per party per day expenditures			
Extending season (shoulder, winter)			
New activities			
More shopping			
Improved services			
Improved marketing/promotion			
Potential effectiveness	Ineffective - No change Effective - Up to a 10 percent increase Very effective - 11 to 25 percent increase Extremely effective - More than 25 percent increase		
Practicality	Very difficult - 1 Very easy - 5		
Priority	0 - Don't bother 5 - High priority/worth a lot of effort		

C9. KEY RESPONDENTS: ROSSPORT.

Sheila Basher	Owner, Rossport Inn
Ned Basher	Owner, Rossport Inn
Mary Burnett	Owner, Serendipity
Leslie Dickson	Superior North Community Future
Susan Glad	Owner, Nipigon Bay Resort
L.P. Halonen	Rosspport Islands Management Board
Daniella Hutterli	Owner, Chucky's Charters and Lodging
Chuck Hutterli	Owner, Chucky's Charters and Lodging
Dave McCullough	Rosspport Islands Management Board
Darrell O'Neill	Thunder Bay District Parks, OMNR
Mike Renaud	Owner, Halcyon Haven - Charter Fishing
Rose Renaud	Owner, Halcyon Haven - Store
Will Robinson	Nipigon District, OMNR
Dave Speer	Rosspport Area Conservation and Development Group
Dave Tamblyn	Harbour Master

A sample of tourists from Terrace Bay, Thunder Bay, Waterloo, and Toronto, Ontario; and Duluth, Minnesota were interviewed to get their impressions about the community.

C10. WORKSHOP I PARTICIPANTS: ROSSPORT.

Sheila Basher	Mary Burnett	Dennis Burns
Mike Cosgrove	Leslie Dickson	Alice Gowen
Lauri Halonen	Vivian Wood-Alexander	Chuck Hutterli
Bob Jeffery	Colleen Kenney	Ryan LeBlanc
Michael Moore	Peter Reeves	Rose Marie Renaud
J. R. Smith	Judi Sundland	David Tamblyn
Ed Tear	Jim van den Ende	Ida Wanakamik
Juris Zdanovskis		

C11. WORKSHOP 2 PARTICIPANTS: ROSSPORT.

Tim Alexander	Mary Burnett	Kelly Chisholm
Leslie Dickson	Chuck Hutterli	Bob Jeffery
Ryan LeBlanc	Tom McCann	Rose Marie Renaud
David Tamblyn		

APPENDIX D. GENERAL.

D1. KEY RESPONDENTS: GENERAL.

Ontario

Robb Anderson
Patti Bain
Bob Bridge
Lynn Cox
Mark Duggan
Dave Feldbruegge
Don Hallman
Bruce Hole
Volker Kromm
Ernie Lane
Maggie Matear
Doug Melville
Dan Mulrone
Norm Richards
Dave Twynham
Dave VanWagoner
Art Wellington

Position/organization

Ministry of Municipal Affairs
Confederation College
Ministry of Culture, Tourism and Recreation
Ministry of Culture, Tourism and Recreation
Exec. Dir., Sunset Country Tourism Association
Ministry of Northern Development and Mines
Tourism Policy Coordinator, OMNR
Exec. Dir., North of Superior Tourism Association
Abitibi Price
Ministry of Northern Development and Mines
Ecotourism Consultant
Ministry of Northern Development and Mines
Information Section, OMNR
Parks Branch, OMNR
Tourism Professor, Lakehead University
Ministry of Culture, Tourism and Recreation
Ministry of Municipal Affairs

Ely, Minnesota

Bob Carey
Angela Cook

Woods Davis

Linda Fryer
Gary Gotchik
Paul Schurke
Barb Soderberg
Nancy Tubbs

Position/organization

Publisher "Ely Echo"
District Ranger, US Forest Service
Assistant District Ranger, US Forest Service
Owner, Tom and Woods Canoe Outfitters Inc.
Owner, Tom and Woods Canoe Outfitters Inc.
Manager, Ely Chamber of Commerce
Owner, Wilderness Outfitters Ltd.
Dog Sled/Ecotour Expeditions
Wilderness Specialist, Boundary Waters Canoe Area
Manager, International Wolf Center

A sample of tourists from Detroit, Michigan; Columbia City, Indiana; Linno Lakes, Minneapolis, Duluth, Minnesota; and Atikokan, Ontario were interviewed to get their impressions of the community.

Bayfield, Wisconsin

Bob Brander
Larry Balber
Gayle Coyer
Jackie Erickson

Position/organization

Great Lakes Coordinator, US National Parks Service
Red Cliff Indian Reservation
National Wildlife Federation, Marquette
Owner, Rocky Acres Berry Farm

Bill Ferraro
Michael Huntley
Scott Kearney
Todd Kessler
Larry MacDonald

John Manty
Fred Pillinger
John Rebers
Greg Showalter
Dave Strzok
Greg Sweval

A/Chief Ranger, Apostle Is. National Lakeshore
Upper Pen. Environmental Coalition, Marquette
Isle Royale National Park, Houghton
Manager, Inland Sea Society
Owner, Apostle Islands Outfitters and General Store;
Past Pres. Bayfield Chamber of Commerce
Editor, "Superior Vision", Houghton
Owner, Morning Glory Bed and Breakfast
Biology Professor, Northern Michigan University
Manager, Bayfield Chamber of Commerce
Owner, Apostle Islands Charters
Owner, Trek and Trail

A sample of tourists from: Minneapolis, St. Paul, Rochester, Minnesota; Wisconsin Dells, Wisconsin; and Thunder Bay and, Kenora, Ontario were interviewed to get their impressions of the community.