

## **International Trends in Park Tourism and Economics: Implications for Ontario**

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### **Abstract**

Nature-based tourism is a large and growing global industry. Much of this tourism is based in parks and other forms of protected areas. The existing tourism depends upon high levels of environmental quality and suitable levels of consumer service. Several countries have nature-based tourism as their most important export industry. Canada has an important and well-recognized nature-based tourism industry, partially based in Canada's parks. However, Canada lags behind many countries in the development of this industry. There are significant limitations in national and provincial policy development and program implementation in the field. Ontario has some international reputation and experience in the field, but has major limitations for any significant further development. A detailed discussion is presented of Ontario's opportunities and limitations.

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### **Introduction**

Nature-based tourism is a large and growing global industry. Much of this tourism is based in parks and other categories of protected areas. This tourism is dependent upon two fundamental components: high levels of environmental quality and proper levels of consumer service.

This paper looks at parks as elements of a tourism market. It discusses several components of this market globally and provides context for the situation in Canada and Ontario. Both opportunities and challenges are presented for the development of international tourism in Ontario's parks.

Nature-based tourism is the travel and tourism activity dependent upon the positive destination attributes of the natural environment. Eagles (1995a) suggests that the nature-tourism market is sufficiently large that it contains at least four, recognizable niche markets: ecotourism, wilderness use, adventure travel and car camping. Each of these niche markets is determined by a unique set of social motives. An understanding of these motives is essential for recreation planning. Each of the niche markets is at a different stage in the typical business cycle (Figure 1). However, for this paper the broadly defined term of nature-based tourism will be used as a synonym for sustainable tourism and will be considered to contain all of the four identified niche markets.

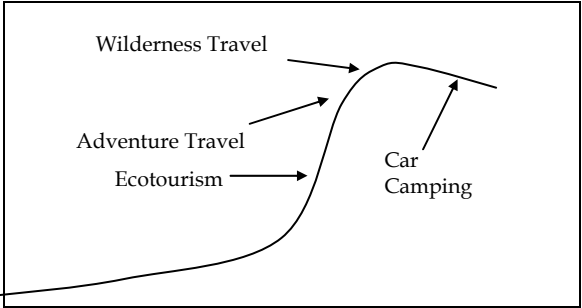


Figure 1: Sustainable Tourism Business Cycle

Global Park Trends

The area of parks and protected areas continues to increase. By 1996 the world's network of 30,361 parks covered an area of 13,245,527 square kilometres, representing 8.84% of total land area. This area occurred in 225 countries and dependent territories (Green and Paine, 1997). Figure 2 shows the growth of this network over a 100-year period. The impressive growth of the world's park network is the result of the widespread acceptance of the ecological ethic. In addition, the tourism activity occurring in these sites creates a self-perpetuating phenomenon of visitation, education, and desire for more parks, visitation and education.

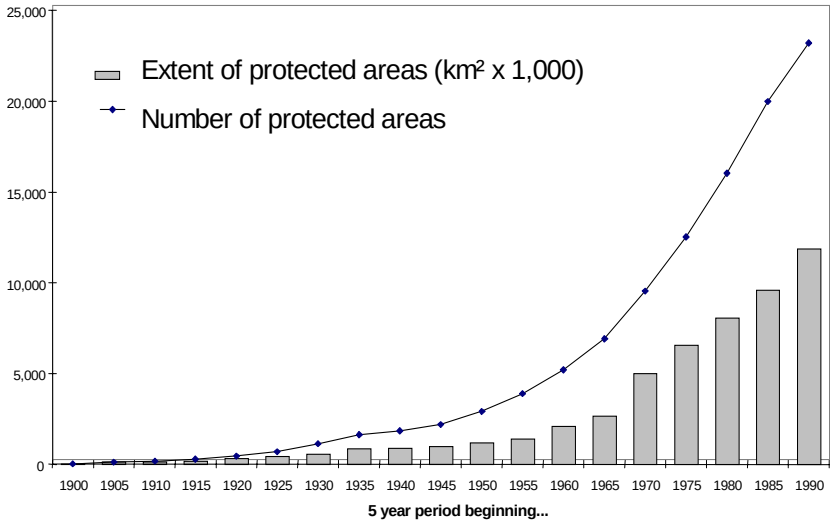


Figure 2: Cumulative growth in the number and extent of protected areas (1900-1994)

The network includes a wide variety of types of protected areas, ranging from nature reserve through to protected landscape, within the IUCN six-category system. Table 1 shows the global network by management category. All six categories are well represented in the network, but with national parks and

resource management areas being particularly important. National Parks, Class II, cover 2.67% of the earth's land surface. The name national park is closely associated with nature-based tourism, being a symbol of high quality natural environment with a well-designed tourist infrastructure. Eagles and Wind (1994) found that Canadian ecotour companies frequently used the name national park as a brand name to attract potential ecotourists to their sales offerings. With 30,361 parks in the world, and 3,386 given the well-known name of national park, it is clear that any particular political unit, such as the Province of Ontario, has a major task to get its sites recognized globally. There is a lot of global opportunity for potential ecotourists. Ontario has the disadvantage of having many of its sites known as provincial parks, a name unknown outside Canada and suggestive of a lower level of importance.

| <b>IUCN Category</b>           | <b>Number</b> | <b>Percent</b> | <b>Total Area in km<sup>2</sup></b> | <b>Percent</b> | <b>Mean Area in km<sup>2</sup></b> | <b>Percent total land area of the world</b> |
|--------------------------------|---------------|----------------|-------------------------------------|----------------|------------------------------------|---------------------------------------------|
| <b>Ia. Nature Reserve</b>      | 4,395         | 14%            | 982,487                             | 7%             | 224                                | 0.66%                                       |
| <b>Ib. Wilderness</b>          | 806           | 3%             | 940,344                             | 7%             | 1,167                              | 0.63%                                       |
| <b>II. National Park</b>       | 3,386         | 11%            | 4,000,825                           | 39%            | 1,182                              | 2.67%                                       |
| <b>III. Natural Monument</b>   | 2,122         | 7%             | 193,022                             | 1%             | 91                                 | 0.13%                                       |
| <b>IV. Habitat Area</b>        | 11,171        | 37%            | 2,460,283                           | 19%            | 220                                | 1.64%                                       |
| <b>V. Protected Landscape</b>  | 5,584         | 18%            | 1,067,118                           | 8%             | 191                                | 0.71%                                       |
| <b>VI. Resource Management</b> | 2,897         | 10%            | 3,601,447                           | 27%            | 1,243                              | 2.4%                                        |
| <b>Total</b>                   | <b>30,361</b> | <b>100%</b>    | <b>13,245,527</b>                   | <b>99%</b>     | <b>436</b>                         | <b>8.84%</b>                                |

Table 1: Global Protected Areas classified by IUCN Management Category

## Economics

Economics is an important component of societal decision-making. It is usually downplayed in the parks world. In parks, the very strong emphasis given to ecology is seen by park proponents as sufficient justification for public policy action. However, nature tourism is increasingly becoming important within sustainable development because of the potential for contributing to local and national economic development while also providing incentive for nature conservation and biodiversity conservation (Wells, 1997).

Most of the world's protected areas charge minimal entry and user fees. These fees typically cover only a portion of the cost of protecting the resource and providing the features on which park visitation depends. This pricing policy developed during a period in which resource protection was seen as the overwhelmingly important objective, a public objective that benefits all of society. If a public good benefits all, it can be reasonably argued that it should be paid for by taxes on society. However, this logic falters when applied to outdoor recreation in parks as only those who participate in outdoor recreation are beneficiaries. In a time of government financial retrenchment, it is increasingly difficult to justify public expenditure to subsidize the recreation of a few.

Governments across Canada are utilising this logic, in part, in the reduction of grants (Eagles, 1995b) and the development of new forms of park administration and new pricing policy (Van Sickle and Eagles, 1998). The Parks Canada business plan summarizes this concept with the statement that "subsidies will be phased-out on services of benefit to individuals, by transferring the operation to the nonprofit voluntary or private sectors, or these services will be stabilized on a full cost recovery basis" (Parks Canada, 1995, p. 7).

There are dramatic differences amongst the world's parks in terms of pricing policy, tourism income, and financial management. A global study of biosphere reserves found that only 32 of 78 responding sites charged visitors admission fees (Tye and Gordon, 1995). The fees ranged from less than \$5.00 per person per day to \$110, in United States funds, with the majority at the lower range. There was a statistically significant relationship between total direct income and the numbers of visitors for all biosphere reserves. Higher visitor numbers corresponded to higher budgets. The authors concluded, "better financed biosphere reserves are likely to be better managed, thereby attracting more tourists" (Tye and Gordon, 1995, p. 29). Presumably those reserves with more tourists gained higher political profile. This political strength allowed them to argue for more budget allocation from government. Some sites also earned income from use fees. This study is important because it shows a strong and positive relationship between protected areas budgets and tourism levels. The general principle is that those parks with high levels of satisfied clients gain political power. This power can be translated into higher budget allocations.

Parks often supply the most important part of the nature tourism experience, but typically capture little of the economic value of the stream of economic benefits. The low entry and use fees in parks are one result of the consolidated revenue effect. Since park management does not keep the fees within its financial structure, there is little benefit in adequate fee collection. This effect also contributes to a low emphasis on park visitor management. Return rates, length of stay, visitor satisfaction and service quality all suffer when the financial return from the visitors is not tied directly to the financial operation of a park. This lack of proper emphasis on visitor management results in a dwarfed nature-tourism industry, one not fulfilling its potential.

Many governments see nature-based tourism as an important tool for economic development. Unfortunately, most have not invested sufficiently in staff training, infrastructure or park resources that are needed to support nature tourism. This exposes sensitive sites to tourism-caused degradation (Wells, 1997).

Most national tourism agencies do not keep statistics on market sectors. Other management units, such as park agencies, seldom fill this information void. As a result, important sectors, such as nature-based tourism, are not clearly documented for the benefit of policy determination. This situation is evident in Canada. Clearly nature-based tourism is one of the key elements of Canadian tourism. Filion et al. (1994) estimated that as much as one quarter of the tourism expenditures in Canada, can be attributed to wildlife tourism, one of the elements of nature tourism. Generally, the importance of nature tourism is severely under-rated due to lack of adequate information.

In Canada, there is no national documentation of park-based tourism. Neither the volumes of park visitation nor its economic impacts are systematically collected and made available for government and private consumption. Compare this situation to other economic generators, such as auto manufacturing or forestry where the volumes and economic value of the products are carefully documented within a continuous stream of information. The new Canadian Tourism Commission is now providing quarterly Canadian tourism figures to governments, business and the media. These data have considerably raised the profile of tourism within the business sector.

Wells (1997) documented, globally, the economic studies available on nature tourism. Most of these studies are of individual parks or wildlife reserves. There are few regional or national studies of the economic impact of the tourism associated with parks and reserves.

Wilkie (1997), an undergraduate student at the University of Waterloo, compiled a national park use database for Canada. She found that in 1994, the last year that complete data were available for all 13 senior park agencies in Canada, 117,000,000 visitor days occurred in Canadian national and provincial parks.

Ontario has a large and well-used provincial parks system consisting of 272 parks. In 1992 the total economic output from park users and by government was \$831,200,000 (OMNR and Econometric Research, 1993). A total of 12,172 years of employment resulted from parks. This benefit was calculated from data on the 109 parks that were staffed to allow visitor use in 1992. More economic benefit would be found if national parks and conservation areas were added to the calculations.

Ontario Parks uses the Ministry of Natural Resources Social and Economic Impact model for estimates of economic impact of the provincial parks (Mulrooney, pers. comm.). Information from this model is used for budget planning, local political promotion and sales of park product. However, this modest effort needs to be increased in scope. Currently, Ontario Parks receive inadequate recognition for their local economic contributions.

The most recent economic benefits study for a park system undertaken in Canada was done for BC (Coopers and Lybrand, 1995). The study concluded that the BC provincial parks system is a major source of economic activity in the province. In 1993 the parks generated 5,300 jobs directly and 4,000 jobs indirectly. The 5,300 jobs created by parks are comparable to other industries such as newsprint (4,200), metal mining (3,800) and coal mining (3,000).

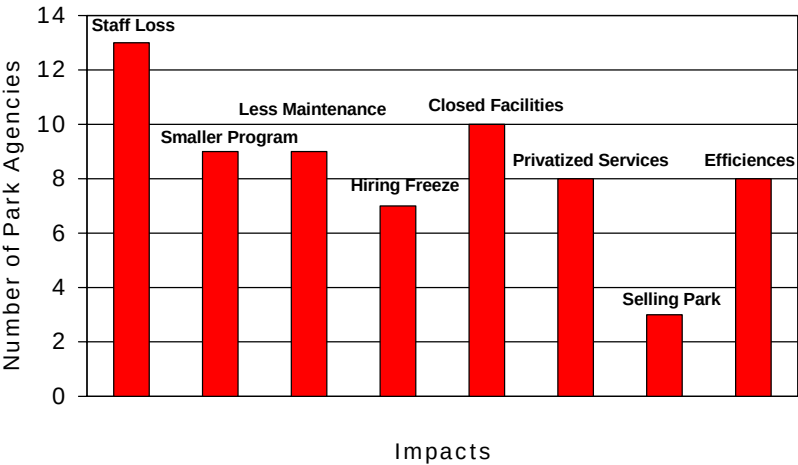
Coopers and Lybrand Consulting (1995) calculated that in 1993 British Columbia provincial parks produced total benefits of \$430,000,000 (Canadian). These benefits included direct benefits, and consumer surplus. In 1993 the parks had 22,300,000 visitor days of activity. Therefore, each day of recreation produced an economic benefit of \$19. The OMNR and Econometric Research (1993) calculated that in 1992 the total economic output due to Ontario parks was C \$831,200,000. This amount included direct, indirect and induced impacts of parks. In 1992 Ontario had 7,000,000 visitor days of recreation activity. Therefore, each day of recreation produced an economic benefit of \$119. The differences in impact per person come from different approaches to the

calculation of impact. However, if one takes this range of economic benefits and applies it to the visitation to Canada's parks, an economic benefit occurs of between \$2.3 and \$14 billion. Clearly, a standard and consistent method of calculating economic impact is required, and one is now being discussed by the park directors of Canada (Murphy, 1998). However, whichever figure is used, the implications of such a large economic impact on public policy making are immense.

Parks Canada conservatively estimates the economic impact of national parks, national historic sites and parks, and national canals to Canada's GDP at \$1,250,000,000. Around 30,000 person-years of employment occur due to this spending. Non-resident visitors contribute 25% of the visitor spending, or \$275,000,000 annually (Parks Canada, 1995).

Impressive as these figures are, they have not convinced Canadian governments to maintain the tax-based grants levels upon which most of the park systems depend. Figure 3 shows the impact of massive budget cuts on 13 national, territorial and provincial park systems in Canada as estimated in a recent survey (Van Sickle and Eagles, 1998). Clearly the budget cuts and resultant reductions in services and operations have impaired the effectiveness of park agencies in Canada.

Figure 3: Impacts of Budget Cuts in Canadian National, Provincial and Territorial



Park Agencies

The Canadian, Ontario and British Columbia studies show the significance of parks to economic life. However, generally there is a lack of national and provincial economic data on parks. This is a major inhibitor in public policy making across Canada. A similar situation occurs in most countries. For park economics to have the policy impact that it warrants, there must be a continuous stream of up-to-date data provided. At the very least, yearly studies are required.

However, quarterly figures provided to government, business and the media would be more useful and beneficial.

The National Parks Service of the United States developed the money generation model to provide yearly park level economic impact data (NPS, 1995). The MGM estimates the economic benefits to the local economy resulting from monies that come into the local economy from outside sources. The three major categories of financial impact include: expenditures of park visitors who live outside the local area; park-related federal government expenditures; and park-related expenditures by other non-local parties. This model uses park visitation figures, local economic studies and national financial trends to provide an estimate of economic impact for every park, every year. These impact data are used locally to reinforce the concept of parks providing economic benefit. Local park managers reportedly find it useful in discussions with local businesses and governments (Hornback, 1997). The MGM may be the only example of park managers being provided yearly with economic impact figures relevant directly to the park that they manage.

Driml and Common (1995) showed that the economic benefits of nature-based tourism in selected Australian locales far exceed the government expenditures. This research estimated the financial value of tourism in five Australian World Heritage Areas – Great Barrier Reef, Wet Tropics, Uluru National Park, Kakadu National Park, and Tasmanian Wilderness. The five areas studied experienced tourism expenditures in 1991/92 of \$1,372,000,000. The total management budgets were \$48,700,000, and the user fee income to the management agencies was \$4,160,000. Therefore, the management budgets were only 3.5% of the tourist expenditure that occurred in the World Heritage Areas. The revenue raised by government through user fees represented only 8.5% of the government expenditures.

This study shows the very high financial value of tourism in the foregoing five World Heritage Areas. It also reveals the low level of government expenditure for management and the very low level of government cost recovery. Driml and Common (1995) question the ability of the existing management structure to maintain environmental quality in the face of large increases in tourism use. They point out that tourism research expenditures in Australia are very low compared to other economic generators such as agriculture and mining, both of which have a smaller economic impact than tourism.

Within Canada there is a large range of financial structures within the senior parks agencies; some are government agencies while others function like corporations. Figure 4 shows the range in cost recovery for the 13 most senior park agencies in Canada. The recovery of management costs from tourist charges varies from only a few percent to slightly over 50%. This variation is largely due to government policy dictating the financial structure of the agencies, not to the volume of tourism or the area being managed.

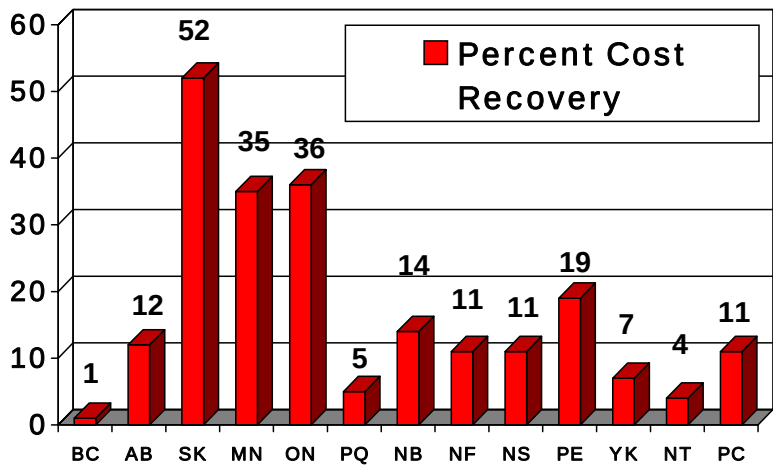


Figure 4: Percent Recovery of Management Costs of Senior Park Agencies in Canada

Parks Canada has designed a management structure that encourages much higher levels of cost recovery. To provide the management structure necessary to implement the new business approach, Parks Canada (1995) obtained government permission to retain and reinvest all revenues; plan and operate on a multi-year, non-lapsing basis; increase non-tax revenues from products and services; borrow against future revenue; and link revenues to costs and to depreciate assets. The approach moves this government agency into management very similar to that of a corporation, a government-owned corporation or a parastatal. To implement this plan new national parks legislation was introduced in the federal parliament in early February 1998.

**Tourism Market**

Is there a market for increased levels of nature-based tourism in Canada? The largest ecotourism market study ever undertaken was done for British Columbia and Alberta in 1995 (HLA and ARA, 1995). For this study ecotourism was defined as “nature, adventure and cultural experiences in the countryside” (HLA and ARA, 1995, p ES-1). The study found a very large ecotourism market in Canada and the United States. In the seven metropolitan areas studied – Seattle, San Francisco, Los Angeles, Dallas, Chicago, Toronto and Winnipeg – a market of 13.2 million potential ecotourists was found. This is much larger than anticipated, and shows that a large market is now present in North America alone.

The study found that the natural setting is the most critical factor in the determination of a quality product. The tourists showed increasing desire to find experiences in environments that were ecologically well managed. Recreational activities were important, and multiple activities were desired. Midrange accommodation was desired, and the experienced ecotourist placed much higher emphasis on the outdoor experience than on the accommodations. Experienced guides and quality interpretive programs enhanced experience quality. The



preferred trip was long, at seven days or more. Parks and the activities found in the parks were indicated as very important components of the travel experience (HLA and ARA, 1995).

Clearly, there is a large and growing ecotourism market in North America. Travel trends throughout the world point to growing markets in Europe and Asia. The issue is not one of potential market size; the issue is one of providing a travel product that fits the market.

### **Visitation Statistics**

All decisions are based upon data and the better the data, the better the chance of a good decision. A fundamental data for decision making is that of product volume. No private company can survive without thorough, accurate and up-to-date data on the numbers and timing of its products and their subsequent sale. However, the consolidated revenue fund effect means that some parks pay low levels of attention to documenting their level of recreation use. In recent years during budget cutting, some managers cut gate staff and visitor management staff, people seen as less important. Imagine a store firing all their cashiers!

However, the move towards fee income reverses this trend, and places much higher emphasis on capturing as many of the clients as possible. However, many parks are poorly designed for documentation of visitation levels. Parks often are quite large with many entry points, making it difficult to tabulate all entrances. Some park clients will try to sneak in, so as to avoid fees. Many parks do not have staff covering all entrances at all times of the day and of the year. Shoulder season visitation is often weakly documented. Within one agency, there may be different data collection procedures in different parks. And in large parks there may be different data collection procedures at different entrances (Wade, 1998).

Ontario has a history of collecting accurate and useful park use figures. Figure 5 shows the visitation trends in Ontario provincial parks over the last decade. Clearly, increases in use are the trend. And it is probable that the budget cuts in Ontario mean that the figures shown in the last few years are underestimated, as staff is not available to count properly in shoulder seasons and in low use periods during the day. The dip from 1995 to 1996 is probably due to this factor.

Every park system has its own, unique system of counting and recording its visitors. Some count all that enter, including recreationists, service vehicles and vehicles just passing through. Some count only those who stay over during the night, ignoring day visitors. Some count only those who pay. Some record the numbers of entrants, some the numbers of visitor hours and others the numbers of visitor days.

There is a need to standardize across the globe the definition, collection procedures and reporting of park tourism statistics. When that is done the park movement will have a new and powerful tool for influencing public policy discussions.

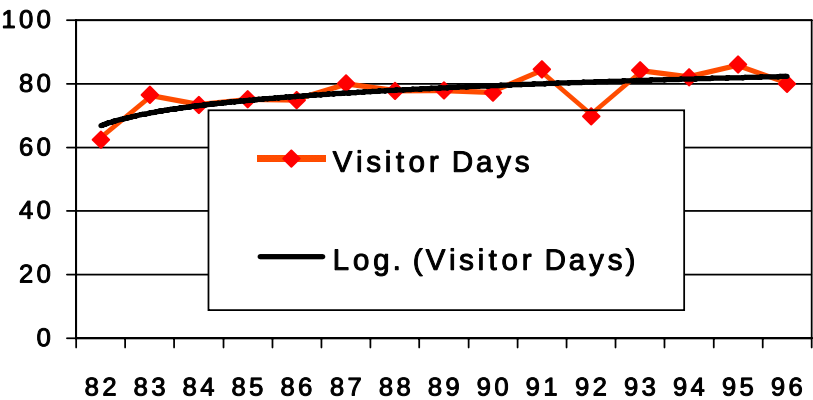


Figure 5: Visitor Use trends in Ontario Provincial Parks

### Ontario in Context

Ontario has a number of opportunities and challenges for the development of a park-based tourism industry. Table 2 outlines the opportunities.

| Opportunity    | Discussion                                                                                                                                                                                                                                   |
|----------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Parks          | Ontario's 272 provincial parks, six national parks and hundreds of conservation areas are an excellent resource for the development of nature-based tourism. Many of the parks have potential for development as international destinations. |
| Management     | The park management authorities are familiar with park visitation. Most are capable of handling some tourism. The parks work within a competent, co-ordinated system.                                                                        |
| Image          | Canada has a global image of being a premier destination for outdoor recreation and nature. Ontario has some international profile.                                                                                                          |
| Transportation | Ontario's international airports, road and water transportation system are first rate and capable of handling the tourism traffic.                                                                                                           |
| Experience     | Ontario has over 100 years of experience in being a destination for international nature-based travel.                                                                                                                                       |
| Finance        | The national parks, provincial parks and conservation authorities have sufficient finance to operate the parks that now exist, albeit usually at quite low levels.                                                                           |
| Location       | Ontario is in the geographical centre of Canada, well positioned for American and global traffic.                                                                                                                                            |

Table 2: Opportunities for the Development of Nature-based Tourism in Ontario's Parks

Ontario has 272 provincial parks, six national parks and hundreds of conservation areas that are an excellent resource for the development of nature-based tourism. The province has 43 senior park management agencies, Parks Canada, Ontario Parks, the St. Lawrence Parks Commission, the Niagara Parks

Commission, the St. Clair Parks Commission and 38 Conservation Authorities. There are thousands of parks owned and managed by municipalities, but it is doubtful if any of these parks are worthy of consideration as international destinations. Many of the senior parks have potential for development as international destinations. Many do not, but can still fulfill an important regional and local role. It is important that tourism development emphasis be placed on those sites that have the most international potential. Ontario has the best wilderness canoeing in the world, much of it occurring in two provincial parks. Ontario has an impressive set of campgrounds that provide high levels of camping satisfaction. Ontario has large numbers of small sites with impressive natural features that taken together can become international destinations.

In Ontario, the park management authorities are familiar with park visitation. Most are capable of handling some international tourism. The parks work within a competent, co-ordinated system. The national parks, provincial parks and conservation authorities have sufficient finance to operate the parks that now exist, albeit usually at quite low levels. The parks' systems have had damaging budget cuts in the last decade, but still retain a competent core of management staff and functions.

Canada has a global image of being a premier destination for outdoor recreation and nature. Europeans, Asians and Americans see Canada as a natural destination. Ontario has some international profile, but much less than the western provinces.

Ontario's international airports, road and water transportation system are first rate and capable of handling significant levels of tourism traffic. Access to the significant sites in Ontario is comparatively easy. This is a major advantage over many of the destinations in poorer countries. Ontario is in the geographical centre of Canada, well positioned for American and global traffic. However, location is now less of an issue due to inexpensive air travel that allows tourists to travel to virtually all corners of the world.

Ontario has over 100 years of experience in being a destination for international nature-based travel. All sectors of society are familiar with the needs of tourism, and capable of handling the social, cultural and economic impacts. There are also challenges for the development of nature-based tourism in Ontario's national, provincial and conservation parks (Table 3).

At least half of Ontario's parks are not now equipped to handle international tourism. Typically these parks lack management capability, sufficient staff, and infrastructure. Examples to illustrate this lack of expertise are easy to find. The five most important countries for Canadian inbound tourism are the United States, the United Kingdom, Japan, France and Germany. What is done to encourage and assist visitation by people from these countries? The answer is, very little. The only group that finds it relatively easy is the experienced camper from the United States who wanders across the border expecting to find suitable sites to visit and camp.

| Limitation              | Discussion                                                                                                                                                                            |
|-------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Parks                   | At least half of Ontario's parks are not equipped to handle international tourism due to a lack of management capability, staff, and infrastructure.                                  |
| Management              | Ontario's parks have insufficient numbers of people with expertise in tourism, marketing, service quality evaluation, and international ecotourism.                                   |
| Image                   | Only a few of Ontario's parks have an international reputation and clientele. Those that do include Point Pelee, Algonquin, Pinery, Niagara Falls and Quetico.                        |
| Marketing               | Ontario's parks management has weak understanding of the global ecotourism market.                                                                                                    |
| Travel Management       | Ontario's parks do very little to facilitate international visitation.                                                                                                                |
| Infrastructure          | It is difficult for Europeans and Asians to visit Ontario's parks. There is very limited roofed accommodation in the parks to handle the international ecotourism market.             |
| Finance                 | There is insufficient finance to hire trained staff, to develop the research base, to develop the product line, to advertise the product and to handle the visitors when they arrive. |
| Sectoral Tourism Policy | Neither Canada, nor Ontario have a nature-based tourism policy. Neither does Parks Canada, or Ontario Parks.                                                                          |

Table 3: Challenges for the Development of Nature-based Tourism in Ontario's Parks

Ontario's parks have insufficient numbers of people with expertise in tourism, marketing, service quality evaluation, and international ecotourism. The level of expertise in these areas will have to be considerably upgraded, if the agencies are to be successful in developing a successful international tourism industry, one that can compete globally. Expertise in service quality management is particularly needed. The North American service industries are the global leader in the development and application of service quality management principles. As a result, the North American consumer expects high levels of quality from service providers.

Government agencies lag far behind the private sector in applying service quality management principles, and this lack is obvious to their clients. Other countries, most specifically the United States, Australia and the United Kingdom, have aggressive tourism research, education and development programs aimed at nature-based tourism. For example, the National Parks Service of the United States is in the process of developing a suite of national cooperative research and training institutes at first-line universities in that country. This follows a similar initiative previously undertaken by the US Forest Service and another by the US Fish and Wildlife Service. Recently, the park agency in the State of Victoria in Australia funded a major cooperative research and education unit in a local university. The recent nature tourism strategy for the State of New South Wales proposes a strengthened link between the national parks agency and universities in that country. No such cooperative units are found in Ontario or in Canada.

Ontario's parks are generally unknown outside the local area, and have no mechanism to provide a higher level of profile. Most of these parks have resources of limited international appeal. Therefore, it is reasonable to suggest

that only some parks should play an international role. These should be carefully chosen within a province-wide tourism development strategy.

Only a few of Ontario's parks have an international reputation sufficient to attract people to the sites as primary travel destinations. Those with an international reputation as tourism destinations include Point Pelee, Algonquin, Pinery, Niagara Falls and Quetico. Generally, provincial parks suffer due to their name. The phrase provincial park is an unknown concept outside Canada, and is typically seen to mean a second class site, when compared to a national park. Australia does not have this problem because all its state parks are called national parks, whether or not the site is of local, national or international stature. The term conservation area is unknown outside Ontario. This phrase uses the word "area", which provides no useful connotation of its purpose. A better word would be "park", a word and concept well-known in most European languages.

Four northern Ontario consultants to Tourism Canada in 1990 bluntly concluded that "exceptional concentrations of unique wildlife species are not a key feature of northern Ontario ... therefore nature viewing will be a secondary enhancement to other adventure product offerings such as canoeing" (Ethos Consulting, 1990: 20). This same study felt that northern Ontario has weak potential for sea kayaking, bicycle touring, sailing, scuba use, backpacking, heli-skiing, trail riding and river riding.

However, the consultants concluded that this part of Ontario has good potential for long-distance snowmobiling, fly-in fishing and canoeing. Provincial parks cater heavily to the canoeing, and general crown land is the locale for most of the snowmobiling and fishing.

The consultants felt that the weaknesses of northern Ontario for outdoor recreation included very long distances between service communities, too much visible resource extraction, repetitive and boring landscape, and lack of vertical relief. In northern Ontario the existing provincial parks were seen as very important components of the nature-based tourism industry. They occupy some of the most interesting landscapes. They also have information and infrastructure that attract tourists. And they can be used within a system of linked travel routes for long-distance travel. However, personal observation suggests that the parks are not managed within a system of linked travel routes.

Ontario's parks administrators show weak understanding of the global ecotourism market. There does not appear to be a policy envelope, an administrative structure nor a staffing complement that recognizes an international role. This is in contrast to the situation in Australia, with both national and state level nature or ecotourism strategies that explicitly deal with the parks as international destinations (Allcock et al., 1994; Worboys, 1997).

A visible example of the lack of understanding of international tourism is the lack of programs and facilities aimed in this direction. International visitation is not directed through a well-designed system of information for the international visitors. Multilingual publications are almost nonexistent. Staff language ability is generally in English, sometimes in French and almost never in any other important language such as German, Spanish or Japanese. Pre-booking by international visitors is difficult or non-existent. There is no way for international

tourists to work through their travel agents to facilitate visitation to any of Ontario's parks. Visitors are expected to bring all the necessary equipment for camping or outdoor recreation, a very difficult and expensive task for trips that involve air travel. Rental or sale of equipment sometimes occurs in the parks, but its availability is spotty and, when available, very difficult to access for international visitors. Access to guides, specialised information or ethnic food for international travellers is seldom easy. Close cooperation with airlines, tour agencies, recreation vehicle rental companies, or hotel chains is almost non-existent. Clearly, parks in Ontario do very little to encourage or even facilitate the visitation by people from Canada's major foreign tourism markets. Given these challenges, it is a wonder that as many international travellers find their way to Ontario's parks as do. However, if these challenges were tackled, the numbers of international visitors could increase dramatically.

The parks' infrastructure is designed for the knowledgeable and experienced Canadian. It is difficult for Europeans and Asians to visit Ontario's parks, unless they camp, itself an extremely complicated procedure. Imagine the complexity for a French or Italian citizen who has not camped before or visited Canada before. It is very difficult for her or him to gain the knowledge of a park, to obtain access, to get all the necessary equipment, to learn how to use the equipment, to gain suitable transport and then to visit an Ontario park. This camping complexity redirects many visitors into other forms of accommodation. However, there is very limited roofed accommodation in the parks to handle the international ecotourism market. There are often suitable accommodations outside the parks, but these are typically small-scale and difficult to access by people from remote locales of the world.

The largest international market for Ontario's parks is in the United States. Ontario is well positioned geographically to attract from the large American populations in the central and northeastern areas of the country. However, Ethos Consulting (1990) concluded that when comparing Ontario's parks to those located in the United States "comparative products can be found closer to home within the US which are better known and well developed." For Ontario to better attract from this market the problems of convenient access, knowledge level and tourism infrastructure development need to be tackled.

Some of the deficiencies outlined are due to insufficient finance. At present, there is insufficient finance to hire trained staff, to develop the research base, to develop the product line, to advertise the product and to handle the visitors when they arrive. The new provincial and national agency status in Parks Canada and in Ontario Parks can help self-finance this endeavour when it gets rolling, but there are insufficient start-up funds. It is important for government to recognize what the private sector already knows: one must spend money to make money. Allocations from Canadian national and provincial governments need to be increased for the development of nature-based tourism. These allocations must be made within the context of a carefully constructed national, provincial and agency policy environment.

Canada and Ontario do not have a policy for the development of tourism on crown land outside parks. Such tourism does occur, and is often important; however, the government action is fragmented and inefficient. Positively, a tourism policy for Ontario crown land is under development within the Ontario

*Lands for Life* program. It will be very interesting to see its content, scale, interagency and intergovernmental connections, and roles given to public and private cooperation.

The challenges are partially due to a nature-tourism policy void in Ontario. Neither Canada, nor Ontario has a nature-based tourism policy. Neither does Parks Canada, or Ontario Parks. The Conservation Authorities around the west end of Lake Ontario have recently developed coordinated policy, but most authorities have no such policy. There is an urgent need for a coordinated federal-provincial nature-based tourism strategy for Ontario. This could involve the Canadian Tourism Commission, the Ontario tourism agency, Parks Canada, Ontario Parks and the Conservation Authorities. This strategy would have to identify key policy priorities, consider which sites have potential for international ecotourism, develop recommendations for market development, provide backing to financial development and schedule a multi-year development plan.

## **Summary and Discussion**

If park tourism is to be given the level of public policy recognition that it deserves, a more consistent and thorough procedure for the collection of visitation and economic data is required. The World Commission on Protected Areas is attempting to standardize the collection and use of park tourism data. The Task Force on the Economics of Protected Areas, headed by Lee Thomas of Environment Australia, has produced guidelines for the measurement of economic impact of parks. The goal of this effort is to standardize methods of measurement and to encourage the collection and dissemination of the output, in countries all over the world.

In parallel work, the Task Force on Tourism and Protected Areas, headed by Paul Eagles of the University of Waterloo in Canada, is tackling the issue of visitor use measurement. This Task Force has a group, headed by Ken Hornback who recently retired as the chief social scientist of the National Parks Service of the United States of America, that has produced draft guidelines on the definitions and methods for collecting visitor use data (Hornback et al., 1997).

The goal of this effort is to standardize the terminology, the measurement methods and the reporting of park visitation globally. Carlson (1997) discussed the complexities of evaluating and monitoring recreation and tourism use. After his study of economic evaluation of recreation and tourism in New South Wales he called for "a more consistent approach to data collection." The Task Force project aims to provide a consistent and standardized approach to data collection, reporting and management.

The output of both task forces will be combined after the next data collection for the United Nations List of National Parks and Protected Areas. This data collection, which is planned for 2000, will ask for visitor use data from all countries. Once compiled, this inventory will provide the first global documentation of park use. Using economic models, this visitor use data will be the base for the calculation of global tourism impacts.

With the movement towards documentation of tourism's volume and impact, discussion is starting on the evaluation of the park management's ability to

handle tourism (Hockings, 1997). The development of management effectiveness guidelines and procedures can assist policy makers, senior management and the public in understanding the capability of park managers and their institutions.

Nature-based tourism is a large and growing component of international tourism. Several countries in the world have nature-based tourism as a very important component of their most important export industry, tourism. These countries include Australia, Kenya, Nepal, New Zealand, Tanzania, Costa Rica and Botswana. Canada has global competition in this field and this competition is becoming more sophisticated each year. The economic importance of the tourism industries in these countries has led to thoughtful policy and institutional development. The national ecotourism strategy for Australia succinctly summarizes the background to the aggressive and successful policy development in that country:

.. ecotourism offers the potential to generate foreign exchange earnings, employment, and other economic and social benefits, particularly in regional areas. It presents Australia with the opportunity to make the most of its competitive advantage, with its spectacular and diverse natural features, unique flora and fauna and diverse cultural heritage. Ecotourism can also provide resources for environmental conservation and management and an incentive for the conservation and sustainable use of public and private land (Allcock et al., 1994: 5).

To ensure the success of the national policy, the Australian government committed \$10,000,000 over four years for the implementation of the strategy. Following the national lead, each state started to develop a similar regional policy, the latest being the one for New South Wales (Worboys, 1997).

Tanzania has a draft national tourism policy document, an integrated master plan and an infrastructure plan (Wade, 1998). A key part of this plan is to develop a southern tourism loop to exploit the national parks and wildlife reserves, such as Ruaha National Park and Selous Game Reserve, in the southern part of the country. This new loop will complement the very successful northern loop that contains sites such as Kilimanjaro National Park, the Serengeti National Park and the Ngorongoro Conservation Area. New Zealand has a very successful nature-based tourism policy that involves high levels of public and private cooperation in the protection of landscapes, the management of protected areas, and the delivery of tourism services.

Strangely, Canada with its abundant resources and well-developed profile in the field has been slow to develop policy and procedures in the field. Canada needs a national sectoral tourism strategy for nature-based tourism. Each park agency at the national and provincial level would benefit from the development of an agency-specific policy, nested within the national policy envelope. Multi-sectoral cooperation with the Canadian Tourism Commission, private business, environmental and recreation groups would be essential. A substantial increase in tourism research is necessary to provide the conceptual base for policy development. Substantial federal funding for implementation of the developed strategies would ensure the launching of a more progressive and successful nature-tourism industry in Canada.



Ontario has an important nature-based tourism industry, partially based on the existing national parks, provincial parks and conservation areas. This industry has the potential for growth, but only if the significant limitations to this growth are recognized and dealt with. The parks agencies are a fundamental element of the industry, but these agencies must further develop their internal policies, staffing resources and procedures for their contribution to be effective. The agencies need to cooperate with each other, with the tourism agencies of government and with the private tourism sector. Crown land in Ontario can play an important role, but not with the existing level of policy development and implementation. Ontario will only become a global player in the nature-based tourism industry with novel, progressive, cooperative and farsighted policy development by government. This policy must be followed with sufficient resources to ensure successful implementation.

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