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The adventure and ecotourism sectors of Canada:

Issues relating to organization and collaboration

Nature and adventure tourism products are symbols that can sell Canada, the provinces and territories, and ensure that they are well positioned. These products convey images of open spaces, northern environments, rivers, whales, polar bears, sea kayaks, dog sleds, etc. In terms of number of visitors, this form of tourism accounts for a larger proportion (%) of international clients than other Canadian tourism products. In addition, the number of nature and adventure tourists as well as ecotourists is growing significantly throughout the world^[i] Is the current level of organization within this sector sufficient? What are the main issues and challenges? Who are the main players? Although it is not intended as a comprehensive or detailed survey of all the players currently involved in the sector, this article addresses these and other questions.

A question of organization ... of collaboration

The question of organization within the nature/adventure/ecotourism sector as is it dealt with here relates to groups and associations of businesses that come together to solve certain common problems and take advantage of opportunities. Most industrial sectors have associations that represent the interests of their members and provide them with tangible services. The tourism sector also uses this collaborative approach, as evidenced by the numerous sector associations dedicated to hotels, lodges, outfitters, ski resorts, transportation companies, restaurants, etc. A 1999 directory of adventure tourism and ecotourism associations in Canada identifies some 86 organizationsⁱⁱ[ii]. Closer examination reveals that the majority of these organizations are made up of enthusiasts/practitioners or guides/instructors in various outdoor activities, while associations of nature/adventure/ecotourism sector businesses are absent throughout the provinces and territories. Moreover, no such association exists at the national level to provide representation and a collective approach. This sector consists primarily of very small businesses that are often isolated and self-reliant and that, individually, cannot address the many challenges that confront them all. The following are a few examples of such challenges:

- Client safety and risk management, specifically the aspect of public liability insurance.
- The issue of the protection/sustainability of the natural environments that the sector's products and businesses depend on over the long term, which highlights the challenge of ethical tourism and the good practices of sustainable tourism.
- Challenges relating to the professionalism and quality required to compete with the well-structured international competition that offers unique, high-quality experiences;

these challenges lie specifically in areas such as certification and training for guides or modification of products to respond to the demands of a clientele with increasingly refined and changing tastes.

- Collaboration with the managers of protected public areas in order to develop products of high quality.
- Packaging multi-activity products that involve more than one provider as well as delivery of different tourism products in other seasons.
- Joint promotions aimed at more effectively reaching market segments that often require a particular, more intensive marketing approach.

A few examples from here and there

In recent years, national and territorial nature tourism associations have sprung up both in Canada and elsewhere in the world. The ecotourism sector has seen a particularly strong trend toward the amalgamation of businesses in countries as diverse as:

- Estonia (<http://www.ecotourism.ee/eng.html>),
- Armenia (<http://www.ecotourismarmenia.com/>),
- Pakistan (<http://www.ecotourism.org.pk/>),
- Thailand (<http://www.thaieco-adventure.org/>) and
- Mexico (<http://www.amtave.com.mx/>).

Among our neighbours to the south, states such as Hawaii (<http://planet-hawaii.com/hea/>) Virginia (<http://www.veta.net/>) and Arizona (<http://www.laruta.org/>) have also set up their own ecotourism associations.

Other associations that are firmly established in the more traditional “outdoor” sector have made a significant shift. For example, the Alaska Wilderness Recreation and Tourism Association (AWRTA) (<http://www.awrta.org/>), which has 288 members, represents an interesting case of modernization and renewal. In 1997, it adopted a new vision to take it into the 3rd millennium, making the shift toward an emphasis on quality and sustainable tourism. A parallel agency, the Alaska Institute for Sustainable Recreation & Tourism (AISRT), was established to support research, education and awareness efforts aimed at sustaining the integrity of Alaska’s natural, cultural and social resources or, in other words, the resources that the members of the AWRTA depend on. This association has adopted concrete approaches encouraging its members to adopt the values and guidelines of ecotourism and sustainable tourism. Its values are clearly reflected in its motto: “Linking business, community & conservation.” The new approach also relies more heavily on the link between nature and culture – particularly Aboriginal culture – than on the outdoors.

Australia, which is often an interesting counterpart to Canada, has a very dynamic nature/adventure/ecotourism sector, in which the Ecotourism Association of Australia (EAA) (<http://www.ecotourism.org.au/>), established in 1991, plays an important role. The 500 members of the EAA represent a range of levels within the sector: those that offer nature-related activities, ecolodges, attractions, managers of protected areas, representatives of local and regional tourism

associations, consultants, educators and students. The EAA has set up and manages a program of nature and ecotourism product accreditation in collaboration with the Australian Tourism Operators Network. The Nature and Ecotourism Accreditation Program (NEAP) is receiving increasing recognition even outside the country, **having obtained the support of the Australian federal government when it was established.** Tourism Queensland, and a number of other tourism organizations in the various Australian states, were particularly supportive of the introduction of NEAP in their jurisdictions. The EAA will soon be launching a program involving the certification of ecotourism guides to complement the NEAP.

A number of associations that are active in Canadian provinces also provide good examples of collaboration among small tourism businesses. In the case of bed and breakfast operations, certain associations have succeeded in rallying their members around a quality objective by introducing an accreditation program. Common membership in such a “brand name” facilitates subsequent joint promotional initiatives. Hunting and fishing outfitters, which have long been organized into associations, are also of interest. For example, the *Fédération des pourvoyeurs du Québec* has been delegated, by the responsible department, to manage the outfitters classification program for the province as a whole; this has had a significant effect on its funding and level of activity.

Current level of organization of the nature/adventure ecotourism sector in Canada

Although data is not extensive, it is possible to sketch a quick portrait of the degree of organization of the sector within Canada at the provincial and territorial level.

ATLANTIC PROVINCESⁱⁱⁱ

- **Newfoundland and Labrador:** A brand new association, the **Adventure Travel Association of Newfoundland and Labrador**. (ATANL), was officially inaugurated on February 16, 2001. This association enjoys the support of the Tourism Industry Association of Newfoundland and Labrador. The challenges and priorities for the coming months include the adoption of an ecotourism code of ethics and guidelines as well as the training of guides. The next step will be a joint promotion effort. In short, the association is facing the same set of issues and concerns that are the focus of efforts on the part of other provincial associations.
- **Nova Scotia:** Two associations are active in this province: the **Nova Scotia Adventure Tourism Association (NSATA)** <http://www.whatasite.com/adventure/>, which has 69 members, and the **Nova Scotia Ecotourism Development Foundation** <http://www.tians.org/nsefd.html>. These organizations are partner associations of TIANS (Tourism Industry Association of Nova Scotia).

QUEBEC

- The **Association des producteurs de tourisme d'aventure du Québec (APTAQ)** <http://www.aptaq.qc.ca/>, which has almost 120 members, has made significant advances since it was restructured in 1997 and obtained the **financial support of Tourisme Québec for a three-year period.** The main achievements include the establishment of a public liability insurance program that is advantageous to its members, and the adoption of safety standards. This association consists primarily of providers, but also

has members who are partners and guides working with those providers. The APTAQ set up the **Club de produits aventure, écotourisme, plein air Québec**, which led to the development of expertise on markets, distribution networks and products. The APTAQ will continue to emphasize professionalism as a partner in the quality program of the Quebec tourism industry[iv]. This association is also evaluating mechanisms that will enable it to integrate the ecotourism sector into its mission and activities. The APTAQ has also participated in the Federation of Québec Outfitters' virtual outfitters and adventure show: <http://www.naturequebec.com>. In addition to the APTAQ, there is the **Association des croisières-excursions du Québec**, which brings together some twenty businesses, a number of which are active in the area of whale and other marine mammal watching.

SASKATCHEWAN

- The mission of the **Ecotourism Society of Saskatchewan (ESS)** (<http://www.ecotourism.sk.ca/>), which was established in 1992[v], is to support and promote both the development of a Saskatchewan ecotourism industry and protection and perpetuation of host natural ecosystems and cultures. The ESS recruits its members from among ecotour providers, conservation agencies, economic and rural development organizations, government agencies, regional and sector tourism associations, professionals, supporters and friends of ecotourism. The ESS established the "Saskatchewan Horizons" ecotourism accreditation program, which expects to have accredited 35 businesses by the end of 2002 and enjoys the support of **Tourism Saskatchewan**.

BRITISH COLUMBIA

- The **BC Wilderness Tourism Association (BCWTA)** was founded in 1999 and its mission focuses on the promotion of tourism in wilderness areas as a viable and sustainable activity and on the protection of natural environments. This association also works to ensure that the needs of the sector are taken into consideration when decisions affecting the natural environment are made. The BCWTA depends primarily on membership fees from its 81 members to fund its activities. British Columbia also relies on an environmental agency called the Oceans Blue Foundation: <http://www.oceansblue.org>, which develops best practices for sustainable development.

YUKON

- The **Wilderness Tourism Association of the Yukon (WTAY)** (<http://www.yukonwild.com>) has some 95 members, which must be licensed under the Yukon's Wilderness Tourism Licensing Act. The Yukon WTA played a very active role in the introduction of this legislation, which is intended to protect both the resource and the safety of clients. This association also launched the **Northern Wilderness Adventure Tourism Product Club**, which has led to an improvement in marketing approaches. The WTAY depends primarily on membership fees for its funding and has an employment program that provides it with a half-time staff.

OTHER PROVINCES AND TERRITORIES

- None of the other provinces or territories is served by an association dedicated specifically to adventure and/or ecotourism and active throughout their entire province or territory. In some cases, adventure tourism businesses join existing associations of hunting and fishing outfitters (e.g. Outfitters Associations of Nouveau-Brunswick, l'Ontariovi[vi], Manitoba...).

OTHER TYPES OF ASSOCIATIONS

- A number of associations of providers are active in a specific area: the Canadian Rivers Council (CRC) in the rafting sector of Ontario and Quebec, the Association of Eastern Canadian Sea Kayak Outfitters (20 members), two associations of sea kayak providers and an association of heli-ski companies in British Columbia.
- Providers' associations also exist at the local level; they include Partners in Eco-Adventure Tourism in the Sudbury region of Ontario, the Nahanni River Operators Association, and the Jasper Professional River Outfitters Association.

Challenges and issues

Based on these and other success cases, the establishment of a viable association seems to depend on several interrelated factors:

- Willingness on the part of the sector and the businesses concerned.
- Involvement of volunteer.
- Triggering events (e.g.: crisis, major problem) or catalysts (e.g.: a symposium).
- A sufficiently large pool of potential members.
- Amalgamation of nature/adventure/ecotourism businesses in a single group and openness to other types of member partners.
- Development of tangible services that are useful to members.
- Funding and/or technical assistance from the government for the start-up and for the introduction of programs that not only serve members but also generate income for the association (self-financing).
- Recognition of the association by the government as the chosen representative of the sector.

Future organization within the nature/adventure/ecotourism sector raises several questions and an equal number of issues.

- Can all the success factors referred to above be assembled in every province and territory? If not, would it be possible to establish an association that takes in more than one province in a given region? If so, under what conditions?
- In many cases, the scope of the challenges that must be addressed is inversely proportional to the means at the disposal of the various associations. In addition, the potential number of members and the size of the business concerned are not conducive

to sufficient funding. Given such a context, what mechanisms and partnerships should be put in place? And by whom?

- Most of the associations share common concerns, including an interest in professionalism, the good practices of sustainable tourism, the skills of guides and the matter of civil liability insurance. Would existing associations not benefit through greater exchange of expertise and discussion of successes and failures? Should this role be played by a Canadian adventure and ecotourism association? Or by a formal, pan-Canadian network of existing associations? Would such a network not be better positioned to make progress in matters involving federal authorities (Parks Canada, Environment Canada, CTC, etc.)? To arrange major sponsorships? To promote quality in every destination?

One thing is certain: several (triggering) events, including the annual Kamloops symposium on adventure tourism and visits among eastern and western providers initiated by the CTC, are contributing to the emergence of an informal network of providers and heads of associations throughout Canada. It may be that this informal network will provide answers to the questions raised in this article.

Maurice Couture

Consultant

Éco Tour Conseils Etc

i[i] This finding is confirmed by the World Tourism Organization (WTO) as well as by many government tourism agencies. What is happening with regard to the organization of this strategic sector within Canada?

ii[ii] This directory was produced as part of work by the Canadian Tourism Human Resource Council on the skills of adventure tourism guides.

iii[iii] Information on the PEI Adventure Tour Operator Association could not be obtained for this article.

iv[iv] Quality assurance program piloted by Tourism Quebec in partnership with sector and regional tourism associations.

v[v] The original name of the ESS was the "Saskatchewan Watchable Wildlife Foundation."

vi[vi] Ontario has three groups that are involved the nature/adventure/outdoor sector: adventure tourism products clubs of eastern Ontario, Ontario Conservation Lands, and independent inkeepers in the cultural and ecotourism sector.