



# **Nature and Outdoor Tourism**

*An Industry Vision for the Future*

January, 2003

**NOTO**

THE VOICE OF THE NATURE AND OUTDOOR TOURISM INDUSTRY IN ONTARIO

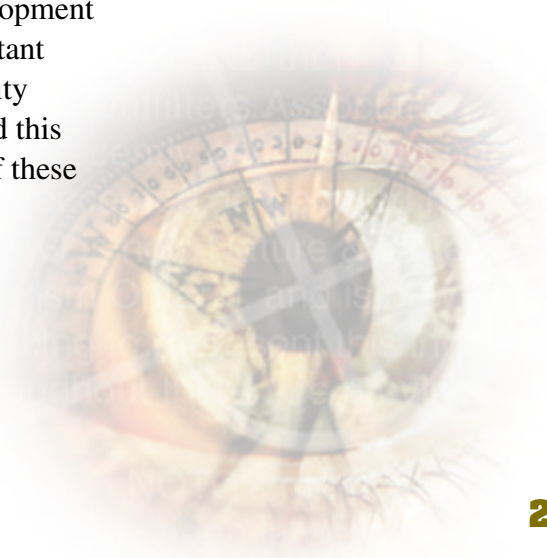
## **Introduction**

For more than 75 years, NOTO has been the industry association representing outdoor tourism. Known throughout most of our history as the Northern Ontario Tourist Outfitters Association, we have recently changed our name and accepted an updated mandate. NOTO is now Nature & Outdoor Tourism Ontario, and is now working to represent this industry throughout the entire province.

Although NOTO's membership has historically been largely made up of hunting and fishing lodges, in recent years it has grown to include a number of businesses in the adventure and ecotourism areas. It has become clear that most of the issues of importance to the nature and outdoor tourism industry, such as land use planning and resource management, affect all sectors. Experience in other jurisdictions such as British Columbia has demonstrated the value of a single organization that can help address the concerns of businesses involved in tourism activities that depend upon crown land and water.

It is also clear that the issues surrounding nature and outdoor tourism are provincial, rather than regional, in scope. An organization dedicated to representing the industry throughout Ontario is therefore also necessary. Provincial marketing efforts, for example, have almost completely ignored the popular outdoor activities of hunting and fishing, even in southern Ontario. The tendency to see the issue of tourism marketing in regional rather than sectoral terms has seriously limited the scope and effective targeting of provincial tourism marketing.

The development of this enhanced, province wide mandate for the nature tourism industry has led NOTO to develop this document. It is intended to describe NOTO's vision in terms of opportunities for new growth and development in nature and outdoor tourism. The economic development potential of enhanced tourism opportunities makes this an important issue for government. We believe that a new, enhanced opportunity for partnership between industry and government now exists, and this document will attempt to describe the industry's view of some of these opportunities.



# **Size and Scope of the Nature and Outdoor Tourism Industry**

## *Defining the Industry*

The Ministry of Tourism and Recreation grants Resource-Based Tourism Licenses to slightly more than 1600 businesses across northern Ontario. Licensing is limited to those businesses that use Crown resources and provide fixed roof accommodation. It is clear that there are many additional businesses that are involved in nature and outdoor tourism that do not fall under current licensing criteria, ranging from non accommodation based hunting outfitters to eco-adventure businesses such as canoe outfitting and river rafting.

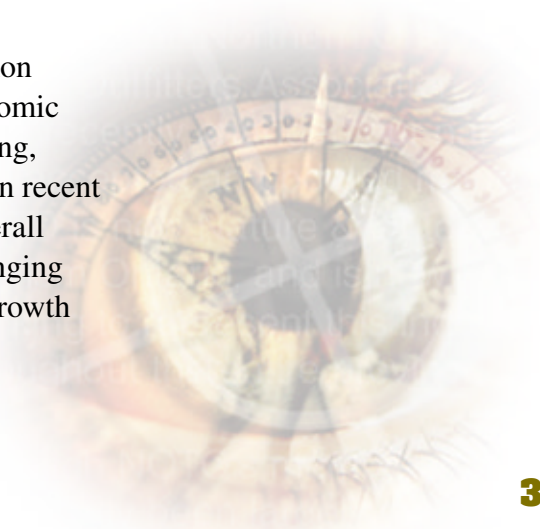
## *Economic and Social Impacts*

Because of their use of the public land base, the nature and outdoor tourism sector has much in common with the other major natural resource industries such as forestry and mining. This is also true of the contribution of nature and outdoor tourism to the economies of northern Ontario communities. The three major resource industries are relatively similar in overall employment impact in northern Ontario, with employment in forestry of 8.1%, mining 6.6%, and tourism 8.8%. (1999 Ministry of Tourism figures).

For many communities in northern Ontario, tourism represents the major source of employment and economic development, and is the only natural resource industry demonstrating both potential and actual growth. As such, it represents a significant asset to remote and rural Ontario and one of the few industries with the potential to reduce the rate of youth out-migration from the north.

## *Activities and Prices*

Historically, fishing and hunting have been by far the most common activities in this sector, representing the vast majority of the economic impact. Other outdoor activities, including snowmobiling, canoeing, ecotourism and various other forms of recreation have increased in recent years, but still account for a relatively small proportion of the overall spending in nature and outdoor tourism in northern Ontario. Changing demographic and social trends will probably lead to continuing growth and importance for these activities, however.



There is considerable range in the price point of nature and outdoor experiences, based on both the type of experience and on regional differences. In general, remote experiences are much more highly valued than drive-in (approximately triple the price, on average). Values are also determined by resource quality, such as the type and quality of fishing, and by the perceived nature of the physical environment (natural vs. developed). There are also pronounced geographic differences affecting price, with prices in northwestern Ontario typically much higher than those in the northeast.

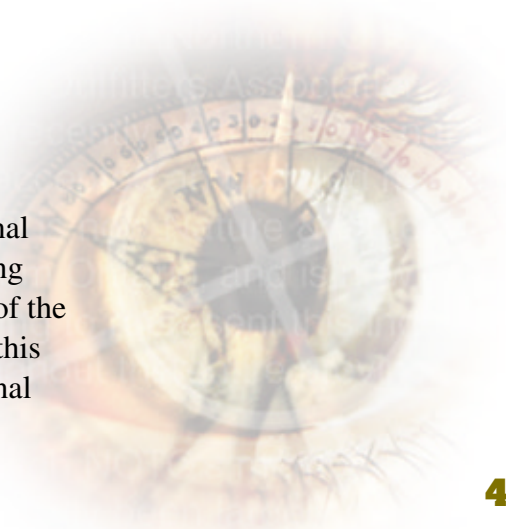
### *Where are the opportunities?*

It is generally felt by most observers that there are many unexploited growth opportunities in nature and outdoor tourism. Although ecotourism and adventure tourism are typically identified as opportunity areas, it should be noted that traditional hunting and fishing activities currently represent the highest value per person night of all tourism activities in Ontario, with remote fly-in activities the highest in this category.

Although future growth must consider resource sustainability, self imposed resource management strategies within the industry have led to a steady rise in consumer spending along with declines in resource consumption in many areas. Clearly, the challenge will be to continue to drive product values upward, while maintaining or reducing resource consumption.

The development of new markets, both in North America and abroad, also represents an area of opportunity. The experience of fishing, for example, is seldom marketed to anyone except experienced anglers. Contrast this with the experience in other tourism destinations such as Costa Rica, for example, where tourists who have never fished before commonly charter fishing boats to experience fishing as a unique, local activity.

Although it is possible to observe many individual examples of development of specialized niche markets in the nature and outdoor tourism industry, ranging from fishing honeymoons to pet friendly resorts, by and large the industry continues to market to the traditional hunting and fishing audiences, often using long established marketing vehicles such as US outdoor activity trade shows. Although the use of the internet as a marketing tool has grown dramatically in the industry, this delivery system has still tended to primarily target the same traditional markets as the sports show circuit.



There has been a very pronounced tendency among nature and outdoor tourism industry operators to see their product as completely self-contained. The industry has typically engaged in very little packaging or co-operative effort with partners such as airlines, urban hotels, or local attractions. This has seriously reduced the attractiveness of our Ontario product in the European and Asian markets, where package products are considered the norm. It also ignores a growing interest in packaged tourism products by segments of the North American market, as witnessed by the tremendous growth in activities like cruises.

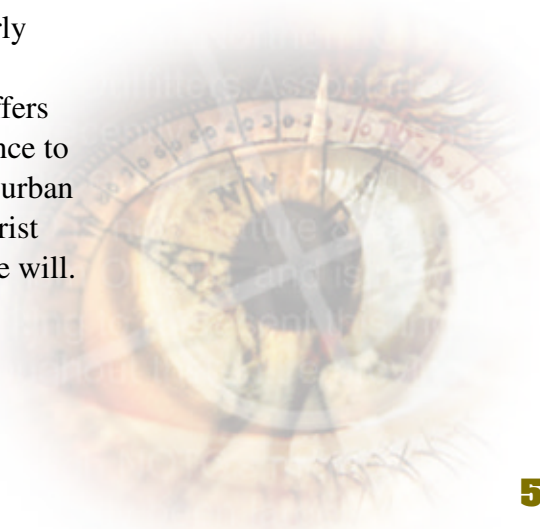
Overall, the major challenge facing the nature and outdoor tourism industry will be to develop the new products, services, amenities and packages that reflect the needs of a changing market demographic. This challenge provides the opportunity to increase product value while managing resource consumption. Based on the range of product price points currently in existence in the industry, it is clear that major economic growth opportunities exist in the potential to move more businesses toward the high end of the product and price range.

### *Importance to provincial tourism*

Although much, though by no means all of nature and outdoor tourism occurs in northern Ontario, it would be a mistake to view this activity in primarily regional terms. This activity heavily influences tourism throughout Ontario in several important ways.

Many tourists who visit Ontario to engage in outdoor activities enter the province through the major entry points in the south of the province, and engage in other tourism activities while enroute to their final destination. Airlines, hotels, restaurants and urban attractions all benefit from this traffic.

Perhaps more importantly, the nature and outdoor sector is essential to the branding of the Ontario tourism product. This factor was clearly recognized in British Columbia more than fifteen years ago, with their British Columbia - Super, Natural branding. Although BC offers considerable urban tourism product, they use the outdoor experience to brand themselves and drive traffic. They have recognized that the urban experience of Vancouver, however attractive, will not attract a tourist from London or Tokyo, but the outdoor experience of the province will.



# **Factors Limiting Growth of the Industry**

## *An ageing and shrinking market*

Traditional hunting and fishing populations are growing older, and younger individuals are not being recruited at the rates seen in the past. Although numbers have generally been sufficient to maintain or even increase opportunities, the demands of the market are shifting fairly rapidly. An increase in family groups and groups of couples without children is being seen as compared to the traditional market of groups of men. With an overall ageing of the market population, a demand for improved service and amenities is being seen. The family and couples markets tend to attach the highest value to improved amenities, but also show the greatest willingness to pay a higher price.

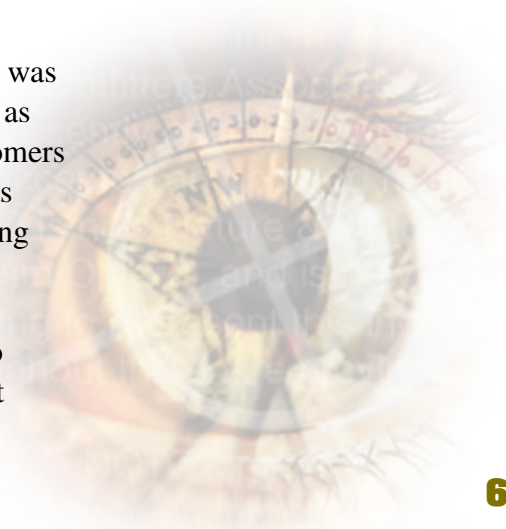
## *Changing cultural demographics*

Ontario continues to experience an increasing immigrant population, especially in major centers like Toronto. This market is especially important to operators in northeastern Ontario, many of whom are located within relatively easy driving distance. Fishing, hunting and other outdoor activities were often popular in their home cultures, even if opportunities were not readily available to most individuals.

The nature and outdoor tourism industry in Ontario is generally not well equipped to introduce new individuals to our traditional activities. Tourist operators are generally not familiar with the past outdoor experience and cultural expectations of an immigrant market, and do not know how to effectively introduce them to the range of experiences available to them in Ontario.

## *Lifestyle rather than market driven*

Many tourist operators enter the business either because their family was in the business, or because of their own enthusiasm for the activities as consumers. This strong identification with the interests of their customers often leads to a very high quality tourism experience. However, it has also tended to narrow the perspective of operators, especially in seeing the needs of new or emerging markets. In short, we tend to offer the activities that we like, rather than looking at what our customers (or potential customers) want to experience. For example, many Ontario outfitters place a very high value on walleye fishing, something most Ontarians like to do, but far less emphasis on northern pike or bass,



which are typically less popular in Ontario. However, these species are extremely popular with many of our potential markets, and are often less heavily exploited.

### *Inconsistent quality control*

The nature and outdoor tourism industry is largely without standards or quality assurance mechanisms. Competitive pressures have tended to drive businesses to deliver a quality experience, especially in light of the strong tradition in the industry of customer loyalty and repeat business.

Emerging eco/adventure markets, as well as the European and Asian clientele typically demand a more formal level of quality assurance. Quality assurance mechanisms will also become increasingly important in maintaining profitability and competitive position, as has been seen in many other industries. The industry will need to develop standards, compliance mechanisms and systems for carrying out training to enable the industry to achieve these standards. This could begin with a set of voluntary industry standards that might later lead to mandatory standards as a condition of licensing.

### *Ageing infrastructure*

There are many examples of businesses whose services and physical plant have not kept up with current consumer expectations. In many cases, the owners have maintained a loyal clientele, but have not significantly raised prices in many years. With their mortgage paid off, they are able to make a comfortable living. However, when the time comes to sell the business, the quality of infrastructure makes it impossible for a new owner to make a profit without extensive facility upgrades and much higher prices.

### *Poor access to capital*

Difficulty in obtaining funds to upgrade facilities or add new products and services is one of the most often heard complaints. The tourism business is not well understood by lending institutions, and a number of provincial resource use policies make these businesses look unattractive to lenders. As a result, most businesses are forced to finance any improvements out of cash flow, seriously limiting the rate at which the industry can grow and develop. Many operators indicate that loan guarantees and other funding assistance programs that were available in the past were extremely effective in allowing growth and development,



with several successful operators attributing much of their current success to the ability to expand and diversify as a result of these past programs.

### *Limited resources to develop new products and markets*

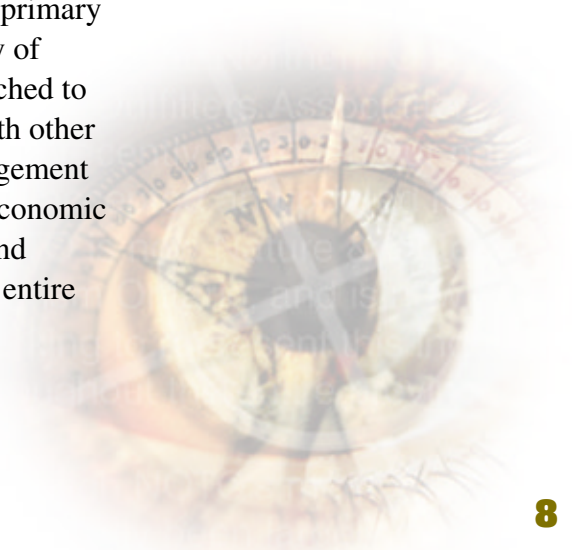
Many businesses in this sector are family owned and owner operated. Generally, they are located in remote or rural areas, with limited access to specialized resources such as business consulting services or post secondary institutions. Operators, therefore, have few opportunities to conduct or even access market research, or participate in workshops or other continuing education activities that could assist them in developing new, higher value products. Operators, therefore, continue to depend on traditionally used marketing methods such as sports shows, which results in very few opportunities for the development of new markets or products.

### *Limited marketing of the sector*

Where provincial marketing efforts have been directed toward nature and outdoor tourism, they have generally been directed toward northern Ontario as a region, rather than toward this tourism sector. This has resulted in very limited integration of nature and outdoor tourism into the overall branding of the Ontario tourism product. It has also resulted in very little marketing of the southern Ontario outdoor tourism product, leading consumers, particularly those outside of Ontario to have a limited and fragmented view of what Ontario has to offer.

### *Splits in government jurisdiction*

Marketing and other tourism development efforts have been further limited by the fact that the responsibility for tourism is shared among several ministries. In northern Ontario, for example, much of the primary responsibility for tourism development is attached to the Ministry of Northern Development and Mines. Tourism support staff are attached to that ministry, resulting in limited integration of their activities with other tourism initiatives elsewhere in the province. Although this arrangement was clearly meant to recognize the importance of tourism as an economic development activity in northern Ontario, improved integration and coordination of effort among ministries would clearly benefit the entire tourism industry.





### *Uncertainty of resource allocation*

Like any industry that depends on the use of natural resources, certainty of allocation is essential to effective business planning and access to capital. The forest industry, for example, receives an allocation of resources on a twenty year planning cycle, with reviews and planning of specific allocations every five years. By contrast, most allocations in the nature and outdoor tourism industry, where any formal guarantee of allocation even exists, are for a one year period. Land use permits, for example, are renewed annually. It is virtually impossible to obtain financing for a lodge or outpost camp without improved security of land tenure.

Another resource that is essential to the industry is the perception of remote, unspoiled wilderness. In many cases, the absence of road access and of any apparent industrial activity is an essential component of this perception. However, concern for these important values generally receives very limited attention during the planning process for forestry operations. Although the tourism and forestry industries can often resolve these concerns in an acceptable fashion for both industries, Ministry of Natural Resources decisions during the forest management planning process often appear to attach a much higher value to increased local public road access for recreational purposes than to management of forest values to maximize the combined economic value of forestry and tourism.

### *Lack of integrated resource planning*

The nature and outdoor tourism industry depends on the availability of a high quality natural environment. The industry has demonstrated a lengthy history of managing this environment in a fashion that has led to high quality, sustainable use and ongoing economic benefit to local communities. The industry remains convinced that the various natural resource industries, as well as local recreational users, can effectively share a common land base. In fact, this scenario is likely to result in the greatest economic and social benefit from our natural resource base.

There has been much public concern regarding the preservation of natural environments for recreational and other socially desirable purposes through the creation of parks and protected areas. Although these areas are undeniably important, they do not remove the requirement for effective management of the intervening land base. Many of the same societal needs that are addressed through the creation of parks are also



addressed by the tourism industry. A trip to a remote fly-lodge is not the same as a visit to a provincial park; both should be part of the range of experiences available to Ontario residents and visitors to the province.

The current forest management planning process has clearly demonstrated its inadequacy to address the total resource planning that needs to be undertaken in order to maximize the total resource value of Ontario's vast tracts of crown land. A comprehensive scheme for planning that addresses the needs of all of Ontario's natural resource users - forestry, mining, tourism, trapping, local recreation and others is clearly needed if we are to make the best possible resource use decisions.



# **A Vision for the Future**

## *An industry poised for growth*

Tourism is the fastest growing industry in the world, and Ontario has some of the most impressive natural tourism resources available anywhere. The outdoor experience available in Ontario is clearly the equal of any in the world. There is no reason that a trip to northern Ontario should be seen as any less exciting or exotic than an African safari or a trip to the Amazon rain forest, nor should it cost any less. The Ontario nature and outdoor experience can and should be a significant driver of other forms of tourism in the province. Although we have identified a number of existing barriers to growth, we believe that there a number of opportunities for government-industry partnerships that can remove these barriers.

## *Licensing*

The Ministry of Tourism and Recreation currently issues licenses to Resource Based Tourism operators. These licenses, issued for a nominal fee, are the primary means of maintaining a database of operators, locations and contact information. This information is used by other ministries and by the forest industry to contact tourist operators.

The need to use this information for the RSA process has demonstrated numerous problems with the current database. Many items of information are inaccurate or absent, particularly winter contact phone numbers and addresses. Errors in the mapping of facility locations are also common. A particularly serious deficiency is the fact that it is impossible to determine an operator's location by Forest Management Unit from the available data. This information is essential for the forest industry, MTR, MNR and NOTO to contact operators regarding the RSA process. This contact by the forest industry is a legal requirement of the RSA process, and problems with the current database have been identified as a serious obstacle by the forest industry.

An accurate operator database is extremely valuable for a number of additional reasons. Any new marketing initiatives, such as a Nature & Outdoor Tourism Directory would depend on the availability of this information. In addition, there are a number of issues in the fish and wildlife area that require the ability to contact tourist operators. The development of the database so that it can be sorted by Forest management Unit, Wildlife Management Unit, district, and various other criteria would solve many ongoing problems.



NOTO is prepared, with appropriate financial support, to update and maintain the tourism license database and administer the Resource Based Tourism Licensing system on behalf of the Ministry of Tourism and Recreation.

### *Standards and certification*

NOTO is currently reviewing standards and certification programs in other jurisdictions, and preparing to develop an initial set of voluntary industry standards. Standards are needed within each industry sector, such as wilderness canoeing or hunting and fishing and would generally be developed by the organizations or operators within that sector.

Subject to availability of resources, NOTO recommends that a comprehensive, industry wide consultation be undertaken to determine appropriate structures, standards, need for educational and other support and to assess the level of industry support for this initiative. We see this level of consultation as essential, both to the development and delivery of an appropriate and effective program, and to obtaining the degree of industry support needed for success.

The introduction of a standards and certification program is desirable both from the standpoint of insuring that consumer expectations are met and also for better preparing businesses for growth and diversification. It may be desirable to make achievement of certain certification standards a precondition for participating in future funding support programs in order to help increase the level of success of these programs.

NOTO is eager to work with government to further develop this initiative, to identify available sources of financial support, and to assume administrative responsibility for the program.

### *Continuing industry education*

Changing market demands and emerging opportunities make ongoing industry education essential for future growth. NOTO is actively pursuing partnership opportunities with post secondary institutions in order to provide the necessary opportunities to the industry. These initiatives fall into two broad areas.

At the basic academic program level, NOTO is actively involved in helping institutions in the development of effective curricula to address critical labour market needs for the industry. Shortages of appropriately trained and skilled personnel are often identified by businesses as a significant impediment to expansion. It is essential that we ensure that



those who enter the labour market have the necessary skill set to respond to the new and emerging markets that have been identified.

Continuing education for business operators and their staff has been identified as an area of opportunity. NOTO is currently involved in the delivery of industry education and support associated with the development of Resource Stewardship Agreements through a funding agreement with the Ministry of Tourism and Recreation. This project is further supported by NOTO through the assignment of a full time staff member to this initiative. NOTO provides telephone consultation, local workshops, educational resources (print, video and web) as well as direct support through RSA consultants.

NOTO, in partnership with Cambrian College, is currently seeking funding for a program to assist the tourism industry in assessing the state of their waste water treatment systems and in determining the most appropriate approach to any upgrades that may be required. The program, if funded, will see a group of consultants examine a sample of approximately 20% of the waste water treatment systems in tourism establishments across northern Ontario in order to establish baseline data on the quality of these systems. This information will be necessary to help determine the need for financial support in order for the industry to meet required standards. In addition, a website will be established to provide accurate, unbiased information on available waste treatment technologies so that operators can make the best possible choices when they undertake upgrades.

At the 2002 NOTO annual conference, a series of workshops was provided to conference attendees on a range of topics including customer service enhancement, dog-sledding, fishing honeymoons as an upscale product, video production as a value added service and forestry and resource planning. Many of the sessions were attended by journalism students, and the resulting articles will be published in *The Outfitter*, and posted on the NOTO website. The keynote speech by Ric Careless of the BC Wilderness Tourism Association was videotaped and will be made available to the industry on video, with the audio portion also available on the NOTO website. These activities were made possible through support from the Ministry of Tourism and Recreation.

Numerous additional opportunities for industry education have been identified. Distance education and other forms of “just in time” delivery will be necessary to make these available to operators with varying schedules who are scattered across the province. Information and education will be a primary tool in the creation of new and higher value tourism experiences to address the changing demands of consumers.

## *Industry mentoring*

On average, tourist lodges change hands every nine years. New operators entering the business face a formidable learning curve. NOTO is currently developing a network of industry mentors to assist new operators. Newly purchased establishments will be identified from real estate records, and paired with a volunteer tourism operator from their area who can provide immediate advice and assistance on everything from how to apply for a bear management area to which sports shows provide the best results. In addition, NOTO intends to offer free NOTO conference registration to new operators in order to expose them to the information available at the workshops as well as provide an opportunity to network with their new peers.

## *Research and technical support*

Many tourist operators report a sense of being overwhelmed by the range of regulations, programs and ever changing requirements that impact their businesses on an almost daily basis. Since many businesses are small, family owned undertakings, located, by their nature in isolated areas, access to important information is generally very limited. NOTO has traditionally employed a research analyst, who, along with other NOTO staff is tasked with providing information to tourist operators on an ongoing basis.

The RSA process has further increased the information requirement to the extent that the NOTO research analyst now devotes virtually all of his time and resources to RSA and other forestry planning related issues. NOTO continues to receive requests for information on a range of other issues, including water and waste system regulations, property tax and assessment issues, and fish and wildlife regulations and policies. The fish and wildlife area is of such concern that operators have repeatedly requested that NOTO add a biologist to the research staff.

Although the Ministry of Northern Development and Mines employs tourism support staff throughout the north, large numbers of tourist operators consider NOTO their primary source of information and first point of contact on issues facing their businesses. Resources to allow expansion of NOTO research and technical support to the industry would assist the industry greatly in managing their businesses more effectively and making the informed business decisions that are needed to allow growth and expansion.



## *A resource allocation license for tourism*

Lack of resource allocation certainty has been identified as a key impediment to investment in the industry. The current scheme of resource allocations is complex and unwieldy. Most operators currently have multiple allocations, each with its own set of rules, conditions and terms. These include, land use permits, bear management areas, boat caches, and moose tag shares, among others. Under the current system, there is no guarantee that all allocations can be transferred when a business is sold, though the economic viability of the business may depend upon the allocation.

NOTO is preparing a proposal for a comprehensive resource allocation license that would combine all of the current allocations into a single license. The system now used by the forest industry could be used as the basic model, with clearly defined allocation terms and rules for transfers. Such a system would dramatically increase the ability and willingness of the nature and outdoor tourism industry to invest in new infrastructure. It could also address some of the special concerns of important new operations like canoeing and river rafting, by allowing licensing of specific operating areas in order to avoid undue concentrations of activity in a few areas, thus preserving the economic value of the activity while avoiding damage to the natural environment.

We believe that such a resource allocation licensing scheme is essential if we are to encourage industry investment and diversification.

## *Product development*

Product development must be market driven. It is essential that market research be conducted, and that the information be communicated to the industry. There is also a need for the prototyping and testing of new tourism products as a precursor to other initiatives, such as continuing education. This will also require an examination of the appropriate marketing mechanisms that are necessary to bring these new activities to the attention of the right audience, and support to the industry to help them use the new marketing tools they may need.

Product development will undoubtedly also include package and partnership development. The weakness of the nature and outdoor tourism industry in creating product packages and delivering them to consumers is well known. It is also clear that this issue must be addressed before any significant growth is likely in the European and Asian markets.



A comprehensive, broadly representative industry organization like NOTO can be an effective mechanism for creating the necessary packages and partnerships. Support from government in helping NOTO to expand to represent all segments of the nature and outdoor tourism industry and in providing the necessary central infrastructure to bring various players together will be essential.

### *Improved sector marketing*

NOTO continues to urge the government to provide an effective mechanism to market nature and outdoor tourism throughout Ontario, and to integrate these efforts into Ontario's overall tourism marketing strategy. NOTO remains willing and eager to act as a partner with government in developing and delivering marketing materials. NOTO formerly published an outdoor vacation guide and currently maintains a marketing website in support of the industry. NOTO can quickly and cost effectively deliver marketing services for the government of Ontario in support of nature and outdoor tourism on a fee for service basis. The model for such a system currently exists in the contract for the delivery of support for Resource Stewardship Agreements.

### *Investment support*

Access to capital remains a major impediment to industry development. Although an improved resource allocation policy would help alleviate this problem, further assistance is also necessary. Funding support arrangements in the form of loan guarantees, guaranteed interest rates or interest support would be of great value in encouraging investment.

One area that requires special attention is the area of infrastructure improvements required by regulatory change. New environmental requirements regarding water treatment and waste disposal systems have the potential to impose a sudden and unexpected financial burden on operators. Many operations simply could not finance these upgrades out of available cash flow, and could be forced out of business if funding support is not available.

### *Improved resource planning*

Tourism needs to receive the level of attention and concern given to mining and forestry in resource use decisions. A decision to allow public access to a new logging road that would drive a multi-million dollar remote lodge out of business, with the resulting job loss, can be made by a Ministry of Natural Resources district manager as part of the forest management planning process. Despite a Resource-Based Tourism





Policy that recognizes the value of the industry, and a Memorandum of Understanding on Resource Stewardship that mandates protection of remoteness and other tourism values, decisions continue that afford more protection to a handful to local recreational users than to northern Ontario's largest and fastest growing natural resource industry.

Implementation decisions by MNR must begin to reflect the economic and social value of nature and outdoor tourism and the stated policies of the government of Ontario with respect to tourism. The experience of remoteness and the perception of unspoiled wilderness are natural resource values as surely as timber or minerals are. Decisions must be made on the basis of sound planning and sustainable economic benefit. The support of all ministries involved is essential for nature and outdoor tourism to grow to its full potential.



## Conclusions

NOTO is a “new” 75 year old business organization with a vision to see nature and outdoor tourism in Ontario finally live up to the potential it enjoys as a result of Ontario’s outstanding natural environment. For northern Ontario, tourism represents the most significant opportunity for economic growth. The northern economy will likely remain resource driven for the foreseeable future, and resource-based tourism represents the only growing resource industry.

For all of Ontario, the unique appeal of Ontario’s environment represents an outstanding opportunity for tourism branding. Nature and outdoor tourism can be a significant driver of Ontario’s entire tourism economy. There are great cities, wonderful restaurants and exciting attractions throughout the world, but there is no other natural outdoor environment like we have in Ontario. The quality and range of outdoor environments and experiences is without parallel. Of course, many who visit will want to experience everything we have to offer, from the excitement of Toronto to the solitude of a remote, fly-in camp. The range and scope of what we offer is what makes Ontario unique.

As the largest organization representing the nature and outdoor tourism industry throughout Ontario, NOTO believes that it can be an effective mechanism in encouraging industry growth and development. Information, education and industry support will be important tools in this endeavor. Many operators already depend on NOTO as a source of information for their businesses. Through publications, workshops and telephone support, NOTO helps the nature and outdoor tourism industry obtain the information it needs. The Resource Stewardship Agreement process has clearly demonstrated NOTO’s commitment and ability to meet industry needs throughout the province.

NOTO is eager to expand these activities into other areas. Many operators have expressed the need for similar information support in fish and wildlife management, and NOTO has identified the need for a fish and wildlife biologist on staff, subject to available funds. Additional support is needed in water and waste treatment, taxation issues, estate and transition planning and several other areas.

With the exception of the RSA process, NOTO initiatives are funded through membership. Unfortunately, this severely limits the range of services that can be provided. These services are clearly necessary in order for the industry to continue to grow. We urge the government of Ontario to work with us to identify other methods of funding these initiatives. We believe that we can provide a cost effective, industry driven means for government to help create economic growth in the tourism industry.