Tourism 4950 Independent Projects

TOURISM DEPENDS ON NATURAL & CULTURAL RESOURCES

TOURISM PROGRAM

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GRENFELL CAMPUS | MEMORIAL UNIVERSITY

Chair's Introductory Note

The B.A. in Tourism Studies program offered at Grenfell Campus, Memorial University of Newfoundland prepares and positions students for exciting, competitive and successful careers in a wide range of vocations that manage, influence and direct tourism at all levels including lodging, food services, transportation, meetings and conventions, special events, entertainment, sports and recreation, heritage and culture, public policy and administration, international relations, and information communications and technology (ICT). Tourism 4950 - Special Project in Tourism, an important component of the Tourism Studies program is available to students who have completed 78 credit hours, and have officially declared a Major in Tourism Studies, a Minor in Tourism Studies, or have been accepted into the Advanced Diploma Program in Tourism Studies. Under the guidance of a faculty member, a student completes an independent research project and produces a report. The project topic must have the approval of the Chair of the Tourism Studies program. The collection of projects undertaken by the students in the Advanced Diploma and B.A. in Tourism Studies program reflects the multisectoral nature of the tourism industry and the invaluable knowledge and experiences the students have acquired. The projects underscore the interdisciplinary, comparative and international approach, dealing with both theoretical aspects and empirical case studies in the tourism industry.

Jessica's Greenwood's main focus of the paper is on the roles that Hospitality Newfoundland and Labrador (HNL) plays in the tourism industry since its establishment in 1983 in the province of Newfoundland and Labrador. The paper highlights the interdependence, interrelationships and partnerships that exist among some of the institutions in spite of the differences in their geographical levels of operation. Wendy Brake's research explores and describes the growth of tourism in Port au Port, Lark Harbour and Sally's Cove communities of Western Newfoundland She also discusses the potential negative impacts that an oil and gas industry, if developed, could have on the tourism industry. Akua Anyemedu's paper analyses and discusses the roles of some selected institutions in sustainable tourism development in Ghana. The major finding is that the communities epitomize the paradigm shift in sustainable tourism development and the institutions supporting them have also pointed them in the right direction of development. Chelsea Kohli's paper discussed the negative and positive impacts of Iceland's nature-based tourism industry and provided recommendations for improvement. The research identifies Iceland's greatest weaknesses are in its planning and management, while its strengths lie primarily in its marketing and advertising sector.

It is quite remarkable that the Tourism Studies program has reached this important milestone in six years. On behalf of the faculty of Tourism Studies, I congratulate all the students who have successfully completed the Special Project in Tourism and wish them a future without boundaries and every success in their endeavors. The advisory and administrative support provided by Dr. Sandra Wright and Krista Hansen-Robitschek, Head and Secretary of the Division of Social Science respectively, are deeply appreciated. Dr. Edward Addo deserves commendation for supervising the projects undertaken by Jessica Greenwood, Wendy Brake and Akua Anyemedu. My didactic experiences have been enhanced by supervising the project undertaken by Chelsea Kohli.

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Institutional Roles and Community Participation in Sustainable Tourism Development in Ghana

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Introduction

In the past two decades the tourism industry has become one of the fastest growing industries in the world. In 2011, 980 million tourist arrivals were recorded worldwide and the number was estimated to increase to one billion in December 2012 (UNWTO, 2012). Furthermore, there has been an increasing awareness of both the positive and negative impacts of tourism on national economies, local communities and the environment. The impacts include poverty alleviation, preservation of heritage and culture, environmental degradation or conservation, income and tax revenue generation, and job creation, particularly for women and the youth. The impacts of tourism on local communities have necessitated a paradigm shift in the concept of sustainable tourism that places more emphasis on the need to efficiently manage natural and cultural resources in order to meet the economic, socio-cultural and environmental needs of both present and future generations (i.e., an intergenerational consideration).

The paradigm shift in sustainable tourism development has been embraced in many developing countries, including Ghana in sub-Saharan Africa, where tourism's contribution to the gross domestic product (GDP) has been increasing in recent years. In 2011, Ghana's total GDP was about US$ 39.20 billion (Trading Economic, 2012) and the World Travel and Tourism Council (WTTC) estimated that tourism's contribution to total GDP in 2011 was 5.4% which was equivalent to GHC3, 121.1 million. Additionally, tourism's contribution to employment was estimated to be 259,000 jobs out of which 106,000 were directly related to the industry (WTTC, 2012).

Some international, national and local institutions have contributed to the growth and development of Ghana's tourism industry in the past two decades. This paper analyses and discusses the roles of some of the institutions, and the nature and scope of sustainable tourism development in some selected communities in Ghana. The analysis and discussion are made in the knowledge that tourism is a driver of economic, socio-cultural and environmental change and some communities in Ghana epitomize the paradigm shift in sustainable tourism development highlighted in the preceding paragraph. In subsequent sections, the research methodology used; the conceptual framework for the research; the literature reviewed on the history, geography, and economy of Ghana; selected public and development institutions that are major stakeholders in sustainable tourism development in Ghana like SNV Netherlands Development Organisation (formerly known as Stichting Nederlandse Vrijilligers), and US Agency for International Development (USAID); and community participation are discussed. The major research findings and recommendations are provided in the final two sections.

Research Methodology, Objectives and Significance of the Study

This paper is basically a qualitative study that used mostly secondary data obtained from different sources including institutional websites. Additionally, an extensive literature review of existing scholarly journals, books and online articles on sustainable tourism development in Ghana was done. The remaining sections of the paper are presented in the following order: the next section provides the conceptual framework for the study and thus critically analyses the concept of sustainable tourism development; the second section provides a brief overview of the history, geography, and political economy of Ghana while the third section highlights the development of Ghana's tourism industry, focusing mainly on the establishment of public sector institutions responsible for tourism development and policy formulation. A review of the roles of international development institutions involved in tourism development in Ghana and an evaluation of the strategies employed by the institutions to facilitate community participation are presented in the next two sections. Discussion of the major research findings and recommendations based on the findings are outlined in the last section.

The major research objectives were: to explore and better understand the concept of sustainable tourism development in Ghana, to identify the strategies employed by governmental and international development institutions to facilitate community participation in sustainable tourism development in Ghana, and to examine the challenges and successes of sustainable tourism development projects and/or programs in some selected communities in Ghana.

Sustainability has become a buzzword in development studies globally and it seems sustainable tourism is the ultimate goal of most tourism institutions, governments and local communities currently and in the near future. Due to capacity limitations local communities, especially those in the developing world, have relied on national governments to lead the way in development programmes and projects, and/or secure support from international development partners. The need for community participation in sustainable tourism development cannot be overlooked or underestimated. Consequently, a primary goal of this paper was to examine the roles of some institutions in promoting community participation in sustainable tourism development. The recommendations offered are meant to inform policy makers about the research findings and the need to give sustainable tourism development and community participation more attention in national development plans, projects and programmes.

Conceptual Framework

The concept of sustainable tourism is value-laden and for that matter has generated different definitions and meanings. Some studies indicate that government and private businesses usually focus on the economic and marketing values whereas communities tend to focus on how to develop and preserve natural and cultural resources while maximizing socio-economic benefits. Environmentalists view sustainability in terms of how to conserve the environmental purity of a destination, site or attraction (USAID, 2005). The United Nations World Tourism Organization (UNWTO) defines sustainable tourism broadly to underscore the need to be conservative in consuming and managing both natural and cultural resources. Sustainable tourism, UNWTO maintains:

> [M]eets the needs of present tourists and host regions while protecting and
> enhancing opportunities for the future. It is envisaged as leading to management

of all resources in such a way that economic, social, and aesthetic needs can be fulfilled while maintaining cultural integrity, essential ecological processes, biological diversity, and life support systems (Harrison, Jayawardena, and Clayton as cited in Goodwin, 2008: pg.3).

The World Tourism Organization (WTO), now the United Nations World Tourism Organization (UNWTO) introduced a revised version of the definition in March, 2004 following the World Summit on Sustainable Development held in Johannesburg in 2002.   This new version highlights some key tenets: sustainability should be sought in all landscapes, whether urban or rural, in traditional resort or eco-camp; community acceptance, engagement, and benefit are critical; and the 'uniqueness of place' must be protected to the fullest extent feasible (USAID, 2005). From the revised definition it is obvious that sustainable tourism is not a special form of tourism but encompasses all forms of tourism. It is also indicative of the importance of community involvement and ownership of tourism development projects to ensure its sustainability in the long term.

The importance of community participation in sustainable tourism development cannot be underestimated.   In Murphy's groundbreaking book, *Tourism: A community approach* published in 1985, he maintains that communities must play a key role in tourism development. Consequently, the author advises policy makers to incorporate community participation into the development process (Murphy, 1985). The author also argues that the top-down method of decision-making in tourism development is ineffective since in most cases the needs and views of the community are ignored (Salazar, 2012; Roberts, 2011). Other authors also point out that Doxy's Irridex model in which host-guest encounters change from the phase of euphoria to that of antagonism, is indicative of what could happen if communities are sidelined in the planning and decision-making process (Roberts, 2011; Wang, 2006).   The issues of antagonism and apathy can be reduced if community participation is incorporated into the planning and decision-making process.   This notion is nurtured on the premises that community participation evokes a sense of ownership of tourism initiatives, projects or programmes and makes communities more likely to act in a more responsible and sustainable manner than if they are excluded.

Achieving the goals of sustainable tourism in developing countries requires collaborative efforts of all stakeholders including governments. Governments must play leading roles in some cases because other stakeholders may be facing capacity constraints (Roberts, 2011). Governments also have 'the power to make regulations and offer economic incentives, and the resources and institutions to promote and disseminate good practice' (UNEP, 2005: pg.3).   It is within this framework that the UNWTO works in collaboration with institutions and governments to achieve the goals of sustainable tourism development (UNWTO, 2008).

In Ghana, the Ministry of Tourism is the governmental institution mandated to develop, coordinate and monitor the implementation of tourism policy. It provides policy direction and creates the enabling environment for tourism development, marketing and regulation. It also maintains strong ties with the private sector, including professional associations and unions, development partners and organizations to work to achieve socio-economic, cultural and environmental objectives of sustainable tourism development in Ghana (SNV, 2009).   The Ghana Tourism Authority, formerly the Ghana Tourist Board, is the governmental agency that implements tourism policies and strategies. It is also responsible for marketing, carrying out

research and facilitating the development of tourism facilities and products (Ghana Tourism, 2008).

In addition to governmental institutions there are private sector enterprises involved in sustainable tourism development and business in Ghana. Examples are in the lodging, food services and entertainment sectors of the tourism industry. There are also international donor organizations like, the United Nations Development Programme (UNDP), SNV Netherlands Development Organisation and US Agency for International Development (USAID) whose development activities promote sustainable tourism development in Ghana. These institutions work in partnership with the Government of Ghana and provide funding and training for capacity building to promote development and alleviate poverty (Teye n.d).

Ghana's History, Geography and Political Economy: An Overview

The Republic of Ghana is located in West Africa and has a total land area of about 238,537 square kilometers. It is bordered to the north by Burkina Faso, to the east by Togo, to the west by Cote d'Ivoire and to the south by the Atlantic Ocean (Figure 1). With a total population of about 24.2 million, Ghana is administratively divided into 10 regions which essentially reflect the ethnic and tribal diversity of the nation (Addo, 2011).

Between 1471 and 1957 Ghana was called the Gold Coast. The name was given by Portuguese sailors and merchants who found abundant gold when they arrived on the shores of the country in 1471.   After the arrival of the Portuguese, the Dutch, Danes, Swedes, Germans and finally the British also arrived in the Gold Coast (Odotei, 2008; US State Department, n.d).

On 6th March, 1957 the Gold Coast became the first country in sub-Saharan Africa to gain independence from European colonial rule under the leadership of Osagyefo Dr. Kwame Nkrumah and formally adopted the name 'Ghana'. This name was adopted from the old Ghana Empire which was located between the rivers Senegal and Niger and about 800 kilometres north of modern Ghana (Odotei, 2008). It also replaced the British flag (the Union Jack) with the Ghana flag and started using its own coat of arms (Figure 2).

Figure 1. Ghana: Administrative Regions

Source: https://www.ghanahighcommissionuk.com/

Figure 2: Flag and Coat of Arms of Ghana

Source: https://www.deejaysyd.blogspot.com

Prior to the settlement of the Europeans and subsequent colonization by the British in 1874, the country was ruled solely by traditional leaders, mostly kings, chiefs and queens. Currently, Ghana is a multiparty democratic state politically governed by the three branches of government, namely the legislature, executive and judiciary. The executive branch of government is headed by a president who is also the head of the armed forces. Traditional rule still exists among the various ethnic and tribal groups. However, the leaders do not wield as much authority as they used to in the pre-colonial era.

The major productive sectors of Ghana's economy are mining, agriculture, oil, and tourism. Oil production in commercial quantities began in December 2010. Consequently the economy became one of the fastest growing economies in the world in 2011 with an estimated GDP of about US\$ 39.20 billion (Worldfolio, 2012; Trading Economic, 2012). The tourism sector has also been making significant contributions to the GDP in the past two decades. According to the World Travel and Tourism Organization (WTTC), tourism's contribution to total GDP in 2011 was 5.4%, which was equivalent to GHC3, 121.1 million new Ghana Cedis. The industry's total contribution to employment was estimated to be about 259,000 jobs out of which 106,000 were directly linked with the travel and tourism industry (WTTC, 2012). The tourism industry is mainly dependent on cultural events such as festivals, colonial legacies such as forts and castles, and the ineffable Ghanaian hospitality. As discussed in the next section, there are also many natural attractions that draw international tourists to Ghana.

Tourism Development in Ghana

In the 1970's a series of studies were carried out in Ghana to evaluate Ghana's tourism potential. According to the Obuan Committee (as cited in Addo, 2011; Teye, n.d), the objective of the first study was to assess Ghana's tourism attractions for a 5-year (1972-1976) development plan. From the very beginning, international development organisations such as the United Nation's Development Programme (UNDP) and the United States Agency for International Development (USAID) were involved in the development of Ghana's tourism industry by providing technical and financial support to the government (Addo, 2011; Teye, n.d).

Teye (n.d) maintains that these studies highlighted a number of key issues pertinent to Ghana's tourism industry. These issues included a lack of local expertise to develop and manage the tourism industry as well as the requisite domestic capital necessary to provide the infrastructure and superstructure required. Furthermore, the limited disposable incomes in Ghana and West Africa as a whole meant that Ghana had to target the European and North American tourist market. These issues resulted in the general consensus that a strategic development plan was needed to ensure sustainability of Ghana's tourism industry in the long term.

The Ghana Tourist Board (GTB), which was established in 1973, is a product of the first study on Ghana's tourism potential. GTB was mandated to perform functions related to the regulation of suppliers of tourism services, promote the development of tourism facilities, and conduct research into tourism trends to inform policy formulation and promotion and marketing of Ghana both locally and internationally (GTB as cited in Addo, 2011).   In 2011, GTB became Ghana Tourism Authority (GTA) with more authority and autonomy to work collaboratively with other stakeholders in the tourism industry.

It was not until 1993 when a government ministry dedicated to tourism development, the Ministry of Tourism, was established in Ghana. The Ministry, with support from the United Nations Development Programme (UNDP) and the then World Tourism Organisation (WTO), produced a 15-year National Tourism Development Plan (NTDP, 1996-2010). This 15-year national tourism plan came in the wake of an earlier failed attempt at implementing a 15-year plan (1975-1990) in Ghana due to political instability (Addo, 2011; Teye, n.d)

Addo (2011) points out the essential principles of sustainable tourism inherent in the 15-year tourism development plan that are worth adhering to by all stakeholders in the tourism industry:

[T]he socio-economic benefits of tourism must be distributed widely throughout the country and society; tourism must be developed in a manner that helps achieve conservation of cultural, historical and environmental heritage; tourism must be developed on a sustainable basis, so that it does not generate any serious environmental or socio-economic problems; tourism must be carefully planned, developed and managed so that socio-economic benefits are optimized and negative impacts are minimized; and tourism development must be comprehensive based on attractions, facilities, services and marketing that are aimed at serving a broad but desirable range of international, regional, African and domestic tourists (Addo,2011: pg. 6)

International Development Institutions and Sustainable Tourism Projects in Ghana

As indicated in the introductory section, tourism development in Ghana has been supported by some international development partners including the Department for International Development (DFID), United Nations Development Programme (UNDP) and United Nations World Tourism Organisation (UNWTO). This section provides an overview of the roles of SNV Netherlands Development Organisation and United States Agency for International Development (USAID), two very active development partners involved with sustainable tourism development in Ghana.

SNV Netherlands Development Organisation

Established in the Netherlands in 1965, SNV Netherlands Development Organisation, formerly known as Stichting Nederlandse Vrijilligers, is an international non-profit organization dedicated to 'a society in which all people, irrespective of race, class or gender, enjoy the freedom to pursue their own sustainable development' (SNV World, 2013). In fulfillment of its mission of inclusive development, systemic change, local ownership, and contextualized solutions, SNV currently operates in 38 countries globally (SNV World, 2013; Calders & Cottrell, 2001).

SNV originally employed the services of volunteers to undertake its development work. However, over the years its mode of operation has evolved to reflect the current global trends in sustainable development practice. SNV now utilizes the expertise of professional advisors who work in the field in collaboration with local staff and residents to achieve its mission. Unlike other development organisations, SNV does not provide funding for development programmes or projects. Instead it provides support through local capacity development, strengthening of governance systems and facilitating the role of the poor in the global market.

The work of SNV continues to evolve as it gains more experience and knowledge in the field and for the 2011-2015 strategic period, its core work will focus on issues related to water, energy and food.   Part of the research information indicates that from the mid-2011, SNV has shifted its focus from Education, Health, Tourism and Forestry to Agriculture, Renewable Energy, and Water, Sanitation & Hygiene (SNV, 2011). This shift, notwithstanding, is worth underscoring in this paper since SNV's activities have contributed immensely to the development of Ghana's tourism industry in the context of sustainable development.

Tourism became a part of SNV's work in the 1990's following the publication of the Memorandum on Tourism by the SNV Headquarters in The Hague. This paved the way for the development of a tourism development policy for SNV. In line with this policy, SNV directed its efforts towards small-scale tourism initiatives to ensure extensive local participation and maximum enjoyment of the benefits that arose. Some of the countries in which SNV has worked to improve sustainable tourism development are Ghana, Benin, Nepal, Tanzania, Laos, Bolivia, and Albania (Calders & Cottrell, 2001).

United States Agency for International Development (USAID)

The United States Agency for International Development (USAID) was established following the signing of the Foreign Assistance Act by President John Kennedy in 1961. Prior to this, US international development assistance was carried out by different agencies and this Executive order brought them all under one umbrella. Since then, USAID has continued to promote US foreign policy and provide development aid to over 100 countries around the world (USAID, 2012).

Today, USAID's core work involves provision of assistance to nations on a wide range of issues including agriculture and food security, gender equality and empowerment, and economic growth and trade. Sustainable tourism falls under USAID's work in environment and climate change and is seen as a 'platform for achieving development objectives in several sectors, including economic growth, environmental conservation, gender mainstreaming, education, and good governance' (USAID, 2013). Thus, sustainable tourism is not seen as an end in itself but as a tool to extend USAID's development reach and achieve its goals. Ghana, Brazil, Tanzania, Dominican Republic, and the Philippines are some of the countries in which USAID has undertaken sustainable tourism development projects.

Both SNV Netherlands Development Organisation and US Agency for International Development (USAID) have been supportive of sustainable tourism development in several communities in Ghana. The projects they have initiated are mostly nature-based or form part of the ecotourism initiatives in the country.   The following section provides examples of the ecotourism projects initiated and/or supported by SNV and USAID.

Sustainable Tourism: the Community Based Ecotourism Project (CBEP)

This two-year (2002-2004) project was carried out to improve ecotourism facilities and provide technical support in 14 selected destinations in Ghana. Other project objectives included promotion and marketing of these destinations and improving ecotourism training and capacity building in institutional organizations. The selected destinations for this project were Amedzofe, Xavi Bird Watching and River Tour, Tafi Atome Monkey Sanctuary Boabeng-Fiema Monkey

Sanctuary, Bobiri Forest and Butterfly Sanctuary, Bunso Arboretum, Tagbo Falls and Mt. Afadjato, Tano Boase Sacred Grove, Tongo Hills and Tengzuk Shrine, Paga Crocodile Pond, Sirigu Pottery and Arts, Wechiau Hippo Sanctuary, Wassa Domama Rock Shrine and Pra River Tour, and the Red Volta River Valley and Widnaba (Zongoiri). These destinations were in 3 tourist circuits namely Volta, Savanna and Forest circuits (USAID, 2005; CBEP, 2004).

The Community Based Ecotourism Project (CBEP) was a joint effort of the Nature Conservation Research Centre (NCRC), Ghana Tourist Board (GTB), United States Peace Corps – Ghana, the Netherlands Development Organization (SNV-Ghana), United States Agency for International Development (USAID) and the local communities in which the projects were situated (USAID, 2005; Calders & Cottrell, 2001). The project involved the commitment and input of all the major stakeholders and USAID served as the funding agency and released funds worth $7 million while SNV contributed expert advisors who provided technical support. Community-level tourism management teams (TMT) liaised with the communities at each location to draft site specific operational work plans. The local communities were also involved in the planning process to ensure that the projects met their needs and conformed to their beliefs and culture. A national community-based ecotourism project steering committee guided by the Ghana Tourist Board oversaw the monitoring and evaluation of the project (USAID, 2005).

Among the specific initiatives undertaken under CBEP in Ghana were the installation of directional signs at the destinations, creation of interpretative centers and improvement of already existing ones as well as provision of office equipment and internet connection at six GTB offices. In order to improve marketing of the ecotourism sites the CBEP managers developed and implemented effective marketing strategies including the production of brochures, introduction of a uniform receipt system at all sites, and carrying out visitor surveys (CBEP, 2004).

One of the achievements of this project was increased visitor days which was one of the goals of the project. The projected total visitor days per year was set at about 20,000. However, this was exceeded by 2,590 in the first 12 months (USAID, 2005; CBEP 2004).

Table 1A: Summary of Visitor Days in 2002

	2002			
Site	Quarter 1	Quarter 2	Quarter 3	Quarter 4
AMEDZOFE	341	422	736	628
LIATI WOTE	236	393	1,325	716
TAFI-ATOME	482	426	808	519
XAVI	5	0	7	32
Subtotal Volta	**1,064**	**1,241**	**2,876**	**1,895**
TONGO	41	22	109	101
SIRIGU	0	0	0	0
PAGA	736	2,124	2,337	629
WECHIAU	250	235	236	180
RED VOLTA	0	0	0	0
Subtotal Savanna	**1,027**	**2,381**	**2,682**	**910**
BOABENG-FIEMA	1,218	1,490	1,994	1,538
BOBIRI	367	296	334	473
BUNSO	0	65	58	0
DOMAMA	33	48	87	100
TANO BOASE	27	132	181	73
Subtotal Forest	**1,645**	**2,031**	**2,654**	**2,184**
Total	**3,736**	**5,653**	**8,212**	**4,989**

Source: CBEP, 2004

It is evident from the data in Tables 1A and 1B that the CBEP recorded gradual increases in visitation, especially in the third quarter of each of the implementation years with Boabeng-Fiema, Paga and Laite Wote recording the highest visitor days in their circuits. According to the CBEP Final Report (2004) the distribution of domestic tourists and international tourists who visited the sites was 58% and 42% respectively.

Table 1B: Summary of Visitor Days, 2003 - 1st Quarter of 2004

	2003-2004 (1st Quarter only = Quarter 9)					
Site	Quarter 5	Quarter 6	Quarter 7	Quarter 8	Quarter 9	Total
AMEDZOFE	606	505	709	615	513	5,075
LIATI WOTE	522	526	889	755	682	6,044
TAFI-ATOME	486	420	445	376	440	4,402
XAVI	43	60	63	143	143	496
Subtotal Volta	**1,657**	**1,611**	**2,108**	**1,889**	**1,778**	**16,017**
TONGO	127	315	222	124	158	1,219
SIRIGU	100	303	303	428	233	1,367
PAGA	1,250	1,730	1,483	1,013	781	12,083
WECHIAU	142	382	143	318	717	2,603
RED VOLTA	0	2	19	30	1	62
Subtotal Savanna	**1619**	**2,732**	**2,170**	**1,913**	**1,890**	**17,324**
BOABENG-FIEMA	1555	1,705	2,386	1,684	1,382	14,952
BOBIRI	573	604	632	353	345	3,977
BUNSO	191	225	717	287	513	2,068
DOMAMA	127	74	104	183	160	918
TANO BOASE	115	289	202	289	181	1,489
Subtotal Forest	**2,681**	**2,897**	**4,041**	**2,796**	**2,681**	**23,390**
Total	**6,837**	**7,140**	**8,317**	**6,5598**	**6,249**	**56,731**

Source: CBEP, 2004

Another goal of the CBEP initiatives was to generate revenue in the participating communities. Table 2A and 2B show the amounts of revenue generated between 2002 and 2004. Another source indicates that at the end of the project cycle the initiatives exceeded the target set for ecotourism activities. The actual achievement was 113% of the annual $140,000 revenue target set for ecotourism activities. The amount was deposited into the community TMT bank accounts to be utilized for community development projects (USAID, 2005).

Other impacts of the CBEP initiatives were measured in terms of female empowerment, poverty alleviation, and development of niche tourism. Female empowerment was achieved in terms of women participation in development projects such as the partnership established between the Manya Krobo Queen Mother's Association and Sedi Beads to export beads to international markets.

Table 2: Summary of revenue generated in 2002

Site	2002			
	Quarter 1	Quarter 2	Quarter 3	Quarter 4
AMEDZOFE	6,582,000	4,313,000	5,989,000	6,937,000
LIATI WOTE	2,425,000	3,113,000	8,474,000	4,202,500
TAFI-ATOME	46,331,000	44,618,000	55,583,000	52,084,000
XAVI	0	0	105,000	489,000
Subtotal Volta	*55,338,000*	*52,044,000*	*70,151,000*	*63,712,500*
TONGO	150,000	338,000	3,104,000	3,165,500
SIRIGU	0	0	0	0
PAGA	2,029,000	2,856,000	3,824,000	1,835,000
WECHIAU	7,815,000	9,555,000	8,162,000	10,946,000
RED VOLTA	0	0	0	0
Subtotal Savanna	*9,994,000*	*12,749,000*	*15,090,000*	*15,946,500*
BOABENG-FIEMA	9,358,000	9,569,000	13,324,000	10,223,000
BOBIRI	5,319,000	11,154,000	14,218,000	12,036,000
BUNSO	0	0	0	0
DOMAMA	402,000	441,000	595,000	904,000
TANOBOASE	80,000	160,000	670,000	485,000
Subtotal Forest	*15,159,000*	*21,324,000*	*28,807,000*	*23,648,000*
Total	40,741,000	48,292,000	76,473,000	66,307,000

Source: CBEP, 2004

Women were also empowered to take up leadership positions like park treasurers and co-operative founders. The creation of micro-businesses such as poultry farms was facilitated by project partners to diversify the economy and create employment opportunities for the communities. This initiative facilitated poverty alleviation in the participating communities. Additionally, village homestays, hiking trips, and chiefdom tours made significant contributions to the development of niche tourism.

Other achievements included infrastructural development; international recognition of some sites by the United Nations Educational, Scientific and Cultural Organisation (UNESCO) and the United Nations World Tourism Organisation (UNWTO) as exemplary contributors to sustainable tourism development; website development; cultural and historic preservation; and excellence in natural resource management (USAID, 2005)

Table 2a: Summary of Revenue Generated, 2003 - 1st Quarter of 2004

| | 2003-2004 (1st Quarter only = Quarter 9) | | | | | |
| | 2003 | | | | 2004 | |
Site	Quarter 5	Quarter 6	Quarter 7	Quarter 8	Quarter 9	Total
AMEDZOFE	6,943,000	9,103,000	11,276,000	11,657,000	9,227,000	72,027,000
LIATI WOTE	5,445,300	3,443,700	4,668,000	7,410,000	6,061,500	45,243,000
TAFI-ATOME	31,548,000	27,000,000	184,215,000	27,707,000	29,119,000	498,205,000
XAVI	458,000	540,000	927,000	2,332,000	990,000	5,841,000
Subtotal Volta	*44,394,300*	*40,086,700*	*201,086,000*	*49,106,000*	*45,397,500*	*621,316,000*
TONGO	2,780,000	2,571,000	3,358,500	5,866,000	3,720,000	25,053,000
SIRIGU	2,649,000	6,718,000	8,739,200	27,913,350	18,460,000	64,479,550
PAGA	2,534,500	4,844,500	9,306,000	6,259,000	4,563,000	38,051,000
WECHIAU	10,325,000	9,514,000	10,274,000	20,139,000	26,345,685	113,075,685
RED VOLTA	0	109,000	1,880,000	500,000	10,000	2,499,000
Subtotal Savanna	*18,288,500*	*23,756,500*	*33,557,700*	*60,677,350*	*53,098,685*	*243,158,235*
BOABENG-FIEMA	17,456,200	22,012,000	30,899,500	30,899,500	16,398,000	160,139,200
BOBIRI	11,245,333	11,677,000	11,129,000	8,377,000	8,189,000	93,344,333
BUNSO	381,500	2,858,000	3,764,000	3,067,000	4,194,000	14,264,500
DOMAMA	1,096,500	974,000	1,478,000	2,688,000	4,635,000	13,213,500
TANOBOASE	1,107,500	2,185,000	1,435,000	1,052,000	765,000	7,939,500
Subtotal Forest	*31,287,033*	*39,706,000*	*52,426,500*	*46,083,500*	*34,181,000*	*292,622,033*
Total	93,969,833	103,549,200	287,070,200	155,866,850	132,677,185	1,157,096,258

Source: CBEP, 2004

Although the CBEP was generally considered a success, there were some challenges. Two of the major challenges were the low visitor and revenue levels recorded especially in the early stages of the project as indicated in Tables 1A and 1B, and Table 2A and 2B (USAID, 2005). The USAID also points out that compliance and involvement was hampered by 'lack of community motivation, leadership, limited inter-village collaboration and consensus building, and internal power structures' (USAID, 2005, p. 59)

Conclusion: Summary and Recommendations

The concept of sustainability has become increasingly popular in recent times in the tourism industry and though its interpretation and implementation differ from destination to destination and among projects, there are some basic tenets that have been adhered to. The tenets include socio-economic empowerment, ecological sustainability, and socio-cultural awareness. This paper has analysed the growth and development of Ghana's tourism industry. It has underscored the importance of collaborative efforts among public and private sector institutions and international development partners in achieving some specific goals of sustainable tourism development.

The importance of community participation in tourism development and community based ecotourism in Ghana, and for that matter in any developing country, cannot be

underestimated. This approach to development has been well received in Ghana and communities have had the opportunity participate fully and productively in community-based ecotourism projects. Local communities have had the opportunity to incorporate socio-cultural beliefs and practices into projects to enhance economic growth and sustainable development. International development agencies and institutions such as the SNV Netherlands Development Organisation (formerly known as Stichting Nederlandse Vrijilligers) and US Agency for International Development (USAID) have been active partners in ecotourism and sustainable tourism development in Ghana. These institutions have been working in partnership with the Government of Ghana and private-sector business to achieve specific objectives of the community-based ecotourism projects.

The paper has also highlighted the importance of education and local resources in ecotourism initiatives and community development. Gender empowerment is one of the laudable achievements of the community-based ecotourism project. Ghana's tourism industry can improve this record by offering more support to women to enable them work productively in all sectors of the industry. Undoubtedly, this paper has not covered all the important issues that Ghana's tourism industry is confronted with. More research is needed to better explore and explain the challenges that Ghana's tourism industry faces and also to better understand the roles that public-sector and private sector institutions, international development institutions and agencies, and tourism business play in the tourism industry. The author is interested in conducting another research to explore and ascertain the percentage of women employed in leadership positions in Ghana's tourism industry and the contributions they have been making to nation's economy. It is hoped that policy makers would make good use of the findings of this paper and those that would be written in the next few years.

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Tourism and 'Fracking' in Western Newfoundland: Analysis of Community Interests and Anxieties in the Context of Sustainability

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Introduction

The communities of Port au Port, Lark Harbour and Sally's Cove in Western Newfoundland are conscious of the impacts that the tourism industry has on their local economies. The communities are also concerned about the impacts that an oil industry, if developed, could have on their living conditions and the local economies. The primary concern that the communities have, justifiably, is the negative impacts that the oil industry could have on the tourism industry if drilling is carried out on a large-scale and the necessary environmental and engineering measures are not timely and effectively taken. Their major concern is justified in the knowledge that in the past decade the tourism industry in the province has been growing significantly and their communities could epitomize this trend. Among the factors accounting for the growth of the tourism industry are institutional building, effective marketing strategies, community voluntarism, and adherence to the basic principles of sustainable development (Government of Newfoundland and Labrador, 2010).

The main objective of this paper is to explore and describe the growth of tourism in the aforementioned three communities in Western Newfoundland and discuss the potential impacts that an oil industry, if developed, could have on the tourism industry, living conditions, and local economies. Furthermore, the competing interests and challenges facing the tourism industry and the challenges that would characterize oil production in the study areas are examined in the context of sustainable development.

The next section outlines the research methodology followed by the literature reviewed on the tourism industry in Newfoundland and Labrador in a subsequent section. In this section, the growth of the tourism industry, its potential for further growth and development, and its benefits to local communities on the west coast of Newfoundland are discussed. An overview of the historical and geographical significance of the three selected communities in Western Newfoundland, and their potential for tourism development are analyzed in the third section. The goals of Shoal Point Energy and its anticipated oil drilling activities in 2013, and the potential impacts of oil production on the tourism industry and the communities in the study area are also discussed in section four. Additionally, the conflicting interests of the tourism industry and oil production are highlighted. The fifth and final section underscores the contribution this paper makes to tourism studies and offers some recommendations for policy consideration in Newfoundland and Labrador, Canada's easternmost province (Figure 1).

Figure 1. Canada: Provinces and Territories

Research Methodology

Since the tourism industry in Newfoundland and Labrador is at the early stage of development, the research methodology adopted for this paper was basically descriptive and empirical.   A meeting with the Destination Management Organization (DMO) of Western Newfoundland in January 2013 augmented the initial interest in the research topic. The disclosure that oil exploration was scheduled to commence in Western Newfoundland in April 2013 augmented the desire to conduct empirical research to find out the reactions of the communities to be affected by the exploration and possible drilling of oil in the near future. The curiosity to find out, describe and understand the impacts of oil production on the communities and the tourism industry was also increased.

The empirical method of information gathering and data collection began with participation in some important meetings. The first meeting which was held on the 17th of January, 2013 in Rocky Harbour provided two outlooks on oil exploration in Western Newfoundland. The first provided by the St. Laurence Coalition called for a moratorium on oil exploration, and the second provided by the owners and operators of Shoal Point

Energy advocated for oil production. After being well informed by these presentations the student Environmental Affairs Committee was contacted to find out its views on the issue. A member of the Environmental Affairs Committee pointed out that the committee would not get involved with the situation and advised me (the author of this paper) to meet with a resident of Corner Brook. Subsequently, a meeting with the resident of Corner Brook, an advocate of a campaign against oil drilling in Western Newfoundland, better informed me, the author, about the conflicting interests of tourism development and oil production in the communities of the study area.

In addition to the meetings, I had direct contacts and interviews with members of the Bay St. George Sustainability Network, Gros Morne Adventures, Port au Port/Bay St. George Fracking Awareness Group, a professor who is conducting similar research, and the Office of Climate Change, Energy Efficiency and Emissions Trading. Secondary data were obtained from the following sources: Hospitality Newfoundland and Labrador, Gros Morne National Park Visitor Survey, Shoal Point Energy Website, Energy Policy Forum, Gros Morne National Park Economic Impact Analysis, Nationwide Townhome Consultants, UNESCO website, The Telegram and other newspapers, CBC News, Department of Culture and Recreation Newfoundland and Labrador website, Gros Morne National Park website, Heritage Society website, St. Laurence Coalition presentation on fracking, the 2011 Newfoundland and Labrador Energy Efficiency Action Plan, Newfoundland and Labrador Oil and Gas Industries Association website, the Ambassador (a publication of the Government of Newfoundland and Labrador), National Geographic - Canada, Newfoundland and Labrador Offshore Petroleum Board, the Huffington Post, and tourism economic reports.

An interesting observation made in the course of data collection and literature review was that two Facebook pages "Save Gros Morne and our West Coast" and "Port au Port/Bay St. George Fracking Awareness Group" had received several comments and criticisms from users. The comments and criticisms linked readers to some credible studies, video clips and other comments relevant to the newspaper stories. For example, news release from Scott Vaughn, Canada's Commissioner of the Environment and Sustainable Development was posted here and links to newspapers providing stories or reports on the subject and other places facing similar challenges or dilemma were provided.

Visits to the study area of this paper and extraction of information and data from websites also constituted a core component of the research methodology. Additionally, the websites of the United Nations Educational, Scientific and Cultural Organization (UNESCO) and the Department of Tourism, Culture and Recreation of Newfoundland and Labrador provided some relevant information and data for this paper. Finally, work experience in the tourism industry on the Northern Peninsula and upbringing in Bay St. George made it easy for me to obtain some pertinent information for this paper.

Literature Review

The literature covers two areas: the genesis and growth of the tourism industry in Newfoundland and Labrador, and oil exploration and drilling in Western Newfoundland.

Each of the areas is presented in the context of economic development challenges facing the province, opportunities for development, and current knowledge of the literature on sustainable tourism development in the study area and other places in the province and the world. As indicated in the preceding section, some of the information about the topic was extracted from websites of institutions and organizations directly or indirectly associated with or responsible for development in the study area.

The Genesis and Growth of the Tourism Industry in Newfoundland and Labrador

The economy of Newfoundland and Labrador has been characterized by some great successes and major setbacks. The abundance of fish in Canada's territorial waters of the Atlantic Ocean bordering Newfoundland and Labrador's east coast was once known worldwide. In the 1800's, fishermen came from all over Europe to fish seasonally off Newfoundland's shores (Newfoundland and Labrador Heritage, 2013a).   Some fishermen settled and raised their families on the island of Newfoundland. By 1992, fishing had become the main occupation of Newfoundlanders and Labradoreans. However, it was at this time that the Federal Government implemented a moratorium on commercial fishing due to a significant decline in cod stocks. The collapse of fishery was devastating to the economy and families in Newfoundland and Labrador. The moratorium created high unemployment rates. Unemployed fishermen and other Newfoundlanders and Labradoreans out-migrated to other parts of Canada in search of jobs.

Tourism development in Newfoundland began in the 1890's. The government then considered tourism as a vehicle for generating jobs and employment. There were few visitors and travel by boat or rail was easy and popular. Most of the visitors came from North America and Europe and they were well educated and wealthy men searching for a wilderness experience. Newfoundland was quite underdeveloped at this time and was marketed as a nature lover's paradise. Pictures showing the beautiful landscape and scenery were used to market Newfoundland. The government at that time recognized that tourism could not be sustainable without further development so in the 1920's more lodging facilities and roads were constructed to accommodate more visitors. The Second World War and the Great Depression negatively impacted visitation to Newfoundland. After the war Newfoundland had to compete with other destinations for wealthy travelers who were looking for places to visit for pleasure and business. Newfoundland could not favorably compete because of its relatively underdeveloped economy, especially the physical infrastructure. Despite the fact that there were few roads before confederation in 1949, an increasing number of tourists arrived and gained a new perspective of the simpler and natural life of Newfoundland. Premier Joseph Smallwood was committed to develop the tourism industry (Newfoundland and Labrador Heritage, 2013b).

After confederation in 1949, Premier Joseph Smallwood was still committed to developing the tourism industry in Newfoundland because of the abundance of natural resources and unique cultures of the people. Travel became easier once air passenger services were expanded and more ferry services were scheduled to and from the island. Special events and festivals like 'come home year' inspired those who had out-migrated from the island to return home. Successive governments after Premier Joseph Smallwood continued to develop the tourism industry. At the same time, the federal government's interest in establishing national parks and sites in Newfoundland provided additional impetus to the development of the tourism industry. In 1979, the provincial

government signed an agreement with the Department of Regional Economic Expansion to develop certain projects in Newfoundland. Money obtained from the agreement was used to reconstruct and enhance historical properties and other tourist attractions. The establishment of national and provincial parks and sites, festivals, and celebration of special events boosted growth of the tourism industry. It is estimated that in 1997 when John Cabot's replica ship arrived in Newfoundland, 69,000 visitors visited the island and spent $51 million dollars (Newfoundland and Labrador Heritage, 2013c).

It was reported in The Telegram newspaper on February 22, 2013, that in 2011 the tourism industry of Newfoundland and Labrador generated over $1 billion in revenue (MacEachern, 2013). On the Northern peninsula alone, the tourism industry generated about $54,800,000 and created jobs for 1,590 workers compared with 390 workers in 1992 (Red Ochre Board, 2012). These statistics illustrate the positive social and economic impacts of tourism on Newfoundland and Labrador. Different tourism organizations, institutions and agencies have contributed to the growth and development of the tourism industry since confederation (Government of Newfoundland and Labrador, 2010).

In the past two decades the concept of sustainability has become a catchword in many communities seeking to achieve harmony in socio-cultural and environmentally-friendly development for present and future generations. Tourism could be a catalyst for sustainable development in many communities by decreasing outmigration and unemployment and by generating more revenue. Sustainable tourism has increasingly become popular in some communities in Newfoundland and Labrador whose economies were dependent on the fishery industry. Tuckamore Lodge located on the Northern Peninsula of Newfoundland demonstrates how a lodging facility could be operated to achieve the goals of sustainability. The Gros Morne Institute for Sustainable Tourism (GMIST) is another initiative promoting sustainable tourism development in Newfoundland and Labrador (Addo, 2010).

Oil Exploration and Hydraulic Fracking in Western Newfoundland
In recent years some oil companies have been drilling oil using an engineering technique dubbed "hydraulic fracturing" or "fracking". Fracking forces large amounts of water mixed with sand and some chemicals through artificially created vertical holes into horizontal cracks or holes running through oil-bearing rocks. The operation also forces out some of the water containing oil, sand and chemicals through the artificially created vertical holes into reservoirs or tanks for processing; crude oil is extracted from the mixture of water and chemicals pumped out from the horizontal holes or cracks in the oil-bearing rocks. Dobb (2013) reports in the National Geographic that this method of oil drilling is practised in USA and other countries. Exploratory work in some coastal communities in Western Newfoundland (Figure 2) suggests oil and gas exist in commercial quantities and could be drilled using fracking.

Figure 2. Communities in Western Newfoundland Targeted for Fracking
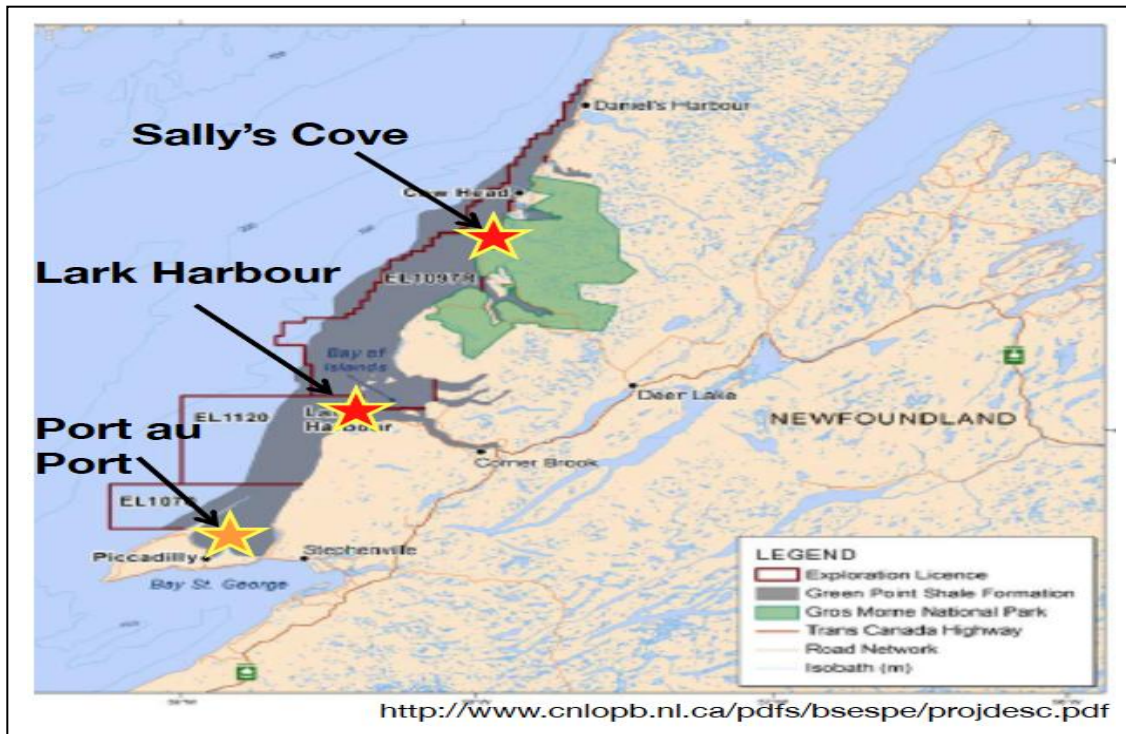
Explorations by Shoal Point Energy, a Toronto based company, suggests the community of Port au Port has great potential to become oil and gas producing hob (Shoal Point Energy, 2010). The same company is interested in drilling oil and gas at Lark Harbour and Sally's Cove (Figure 1). The importance of oil and gas to the provincial economy and also to individual households and consumers in small, coastal and remote communities in Western Newfoundland cannot be underestimated. It is also common knowledge that the demand for oil and gas on the international market has been increasing, especially in countries like China and India where heavy investments in manufacturing, trade, infrastructure development, and travel and tourism have been made in recent years.

Shoal Point Energy was formed in 2006. It is a small company that owns land in Western Newfoundland with the intention to drill for oil. The Financial Post underscores some of the economic attributes of the company; "…is far and away the biggest landowner in the Green Point, having amassed more than 280,000 hectares across three blocks of land" (Financial Post, 2012). Shoal Point Energy has signed an agreement with Black Spruce Exploration Corp to operate the drilling in Western Newfoundland. Shoal Point Energy has also signed on Black Spruce as a private placement financier. Black Spruce is a new subsidiary company of Foothills Capital Corp. It has never drilled for oil. As of March 24, 2013, Shoal Point Energy had not begun fracking. Shoal Point Energy indicated that the oil rig would be shipped to Newfoundland in April 2013. The contractual document and project description of the sites have been sent to Canadian-Newfoundland and Labrador Offshore Petroleum Board (C-NLOPB) for review. The

original plan of Shoal Point Energy indicates oil drilling is to commence in April 2013. However, it seems this would not happen.

It is against this backdrop that the communities of Sally's Cove, Lark Harbour and Port au Port have become more concerned about the impacts that an oil and gas industry, if developed, could have on their living conditions and the local economies. Their primary concern is the negative impacts that the oil and gas industry could have on the tourism industry if drilling is carried out on a large-scale and the necessary environmental and engineering measures are not timely and effectively taken to address them.

Importance of Tourism in the Communities in the Study Area

Sally's Cove is an enclave community in Gros Morne National Park (GMNP) which is one of the main tourist attractions in Newfoundland. The park was established by the Federal Government in 1973 to preserve its natural beauty and history, and to protect it from human destruction. The establishment was also meant to conserve and protect native species, and to provide tourists with a wilderness experience. In 1986, GMNP was designated as a United Nations Educational, Scientific and Cultural Organization (UNESCO) world heritage site for two reasons: its natural beauty, and contribution to understanding the earth through its outstanding geological features. This designation is extremely important because it is on the same UNESCO list as the pyramids in Egypt and the Great Wall of China. Many international and domestic tourists have been visiting GMNP to experience nature and learn about the unique culture and wildlife since its designation as a UNESCO world heritage site. Hiking, kayaking, mountain biking, camping, bird watching, interpretative activities and facilities are popular attractions in the park. Visitation to the park and local businesses contribute to the local economy. Federally accredited national historic sites in the region such as Port au Choix National Historic Site, L'Anse au Meadows National Historic Site, and Red Bay National Historic Site in southern Labrador also boost visitation to GMNP.

In a 2009 Parks Canada visitor survey, the number one reason given by tourists who visited GMNP was the 'beauty, scenery, nature, wildlife, and sightseeing'. Other reasons given by tourists were to relax, spend time with family, enjoy some of the good reputation, and go on boat tours. In 2009, tourist expenditures in the GMNP region was estimated to be $37.6 million and resident and non-resident visitors to GMNP generated an estimated amount of $107.5 million (Parks Canada, 2009a). These statistics underscore the positive economic impacts of tourism on the community.

Lark Harbour is also a small community located on the beautiful rugged coastline of Western Newfoundland. It is considered a part of the beautiful Bay of Islands. Visitors to Lark Harbour are generally outdoor enthusiasts who enjoy nature and a series of hiking trails, which are the main attractions in the community. The hiking trails hug the coastline and allow tourists to breathe fresh air and connect with nature. Lark Harbour's quaint nature and location is often unknown to tourists. Besides the Lark Harbour Multi-Purpose Trail Festival which takes place each summer, the community does not provide other cultural attractions that could attract more tourists. Additionally,

attractions in the community are not effectively advertised as it is done for GMNP. Consequently, most of the visitors it receives often come from other parts of Newfoundland and usually visit the hiking trails in the community.

The importance of tourism in the community of Port au Port is often discussed in relation to Bay St. George on the west coast of Newfoundland. The area has many small communities and geographic attractions including the Port au Port Peninsula. The area is an interesting and important tourist destination because of its natural beauty and unique cultures. Bay St. George has experienced the presence of First Nations since the 17th and 18th centuries (Newfoundland and Labrador Heritage. 2013d). In the 19th century, France had fishing privileges in Newfoundland and made Port au Port its main residential community. For this reason, French was once the only spoken language in the community. French is still spoken in the community and this tradition is also worth preserving and marketing as a cultural attraction. In the early 1940's the United States constructed the Ernest Harmon Air Force military base in Stephenville, the hub of Bay St. George. Although some of the spiritual and traditional practices of living from the land disappeared after the arrival of Americans, the community is still worth visiting for cultural experiences with the existing First Nations. The three unique historical events or attractions of Bay St. George (i.e., the native traditions of the First Nations, the American presence and impacts, and the French community) could be marketed together to boost tourism.

Potential for Sustainable Tourism Development on the Port au Port Peninsula

In addition to having the potential to boost tourism in the Bay St. George area using the three unique events or attractions discussed in the preceding section, there is a need to effectively organize and market other cultural attractions on the Port au Port Peninsula. Some of the communities on the peninsula regularly celebrate some cultural festivals that feature traditional music composed and recorded by local artists. For example, 'Felix and Fromanger', is a well-known local musical group that performed at some of the local festivals and sometimes one of the band members participates in other musical events in other communities such as the Gros Morne National Park. The group has produced and released some musical CDs. A local artist who has singularly made contributions to traditional songs and song writing is Emile Benoit.

In recent years, there have been vigorous attempts to preserve the aboriginal heritage in the Bay St. George region. Flat Bay, a community that has the most native people than any other community in the region, has its own native band. Numerous sweat lodges are located in the community where the band chief resides. A sweat lodge is a spiritual place for ceremony for native peoples. Local drumming takes place once a week in Flat Bay in addition to others in the Bay St. George region. Each summer, Flat Bay performs an annual Powwow which is a celebration of local aboriginal heritage. Tribes from Nova Scotia and Conne River, Newfoundland also participate in this event. The number of attendees has been growing from year to year. In 2012, Flat Bay recorded the highest number of both international and domestic visitors who attended the Flat Bay Powwow event. Most of the attendees were domestic and same-day visitors who came to experience and enjoy the event.

An opportunity always exists for visitors to have authentic tourist experiences on the Port au Port Peninsula. Visitors can learn about the community's culture and heritage by visiting museums or taking part in festivals. The festivals provide tourists with a unique opportunity to listen to the distinct dialect in songs, dance with and talk to the friendly locals. Sometimes a visitor may even think some locals are French when in actual fact they do not speak French but have a French accent. Visitors also have the opportunity to see the homes, military hangers and bunkers of the old American Harmon base in the region.

It is necessary to preserve the culture and heritage of the communities on the Port au Port Peninsula and other communities in the Bay St. George area. There are few places in Newfoundland that have aboriginal people and French communities with American influence. The communities in Bay St. George provide visitors the opportunity to experience Newfoundland's history, culture and heritage. Most of the local people in the communities of Bay St. George are elderly and have invaluable knowledge about the traditional cultures and heritage that need to be preserved and marketed as tourism products to visitors now and in the future. The youth must learn from the elderly and the cultural resources have to be effectively preserved and used to promote sustainable cultural tourism in the local communities. The local communities could look for supplementary support for sustainable cultural/heritage tourism from institutions like Hospitality Newfoundland and Labrador, the Department of Tourism Culture and Recreation in Newfoundland and Labrador, and UNESCO.

Tourism Growth and Institutions in Newfoundland and Labrador

Since the introduction of the Federal Government's moratorium on commercial cod fishing in 1992, tourism has become a more acceptable vehicle for development in many small communities in the province of Newfoundland and Labrador that used to depend overwhelmingly on the fishing industry. As highlighted earlier, the province has abundant and diverse natural and cultural resources for tourism development. The province's scenic beauty has been a major tourist attraction often advertised in various marketing strategies. It has also been pointed out earlier that in a 2009 study by Parks Canada, tourists ranked scenic beauty as their number one reason for visiting the province. Scenic beauty was also ranked the number one most enjoyable aspect of their vacation (Parks Canada, 2009b).

Newfoundland has always been marketed as a getaway, a place to connect with nature and learn about unique cultures. It is also a destination for relaxation and rush-free vacation. From the 1800's to the present, government and businesses have been investing in the tourism industry. The industry has been growing steadily. However, it is characterized by high cost of travel to and from the island and high cost of intra-island transportation. Despite these challenges, the socio-economic and environmental benefits of the tourism industry cannot be underestimated. Tourism is gradually becoming a year-long and more profitable industry (Government of Newfoundland and Labrador, 2010).

There are institutions in Newfoundland and Labrador that work in partnership with tourism businesses and communities that use tourism as a vehicle for socio-cultural,

economic and sustainable development. The institutions have missions, visions and/or guidelines for tourism growth and development. One of the institutions is the Department of Tourism, Culture and Recreation (DTCR) which is located in St. John's, the provincial capital. The vision of DTCR is to make Newfoundland and Labrador:

> a province that is a tourism destination of choice, with superior and authentic visitor experiences, a robust cultural identity, natural and cultural resources that are protected and sustained, creativity in the arts that is fostered and recognized, cultural industries that are strong and vibrant, and an active, healthy population participating in physical activity, recreation and sport at all levels for quality of life and improved health (DTCR, 2013).

DTCR's vision underscores the need to protect and preserve the cultural and natural resources on which the tourism industry depends. The main goal of DTCR is to provide tourists with a unique, quality visitor experience. It is encouraging that DTCR works to promote and sustain the unique cultures and natural beauty of Newfoundland and Labrador.

Hospitality Newfoundland and Labrador (HNL) also located in St. John's, has a vision similar to that of DTCR. HNL's Vision 2020 document introduced in 2012 outlines its strategies to increase tourist visitation by 2020 (Uncommon Potential, 2010). The seven strategies outlined are:

1. Private Public Leadership – A Partnership for Growth & Development

2. Sustainable Transportation Network – A Transportation Strategy to Grow Our Industry

3. Market Intelligence and Research Strategy – A Framework for Accessible & Timely Research

4. Product Development – Delivering Strategic & Sustainable Traveller Experiences

5. Tourism Technology – Strengthening Our Information & Communications Technology

6. Marketing Our Brand – Building on the Success of Our Creative Marketing Campaign

7. Developing Our Workforce – Growing Our People for a Dynamic Industry

Another institution that contributes to the growth and development of the tourism industry in Newfoundland and Labrador is Parks Canada. The Gros Morne National Park Management Plan and the Canadian Parks Act guide and regulate tourism development in the Gros Morne National Park (GMNP). The plan highlights the obligation that GMNP has to protect the natural environment. It partially states, "Gros Morne protects for all time the ecological integrity of the Western Newfoundland Highlands natural region and an eastern portion of the St. Laurence Lowlands natural region" (Parks Canada, 2009a). In view of the fact that GMNP is a UNESCO world heritage site it must follow the regulations set by UNESCO for sustainable development:

> World Heritage properties may support a variety of ongoing and proposed uses that are ecologically and culturally sustainable. The State Party and partners must ensure that such sustainable use does not adversely impact the

outstanding universal value, integrity and /or authenticity of the property. Furthermore, any uses should be ecologically and culturally sustainable (UNESCO, 2012).

The above quotation should underline GMNP's position on sustainable development and what stakeholders should do. GMNP is a nature-based tourist attraction dependent on the natural resources of vegetation, water, topography, wildlife, and climate. These resources have to be used in ways that would not deprive future generations the opportunity to enjoying the same resources. All stakeholders in this attraction should therefore work in partnership with UNESCO to protect and preserve the ecological integrity of the park and the communities that benefit directly or indirectly from it.

The Office of Climate Change, Energy Efficiency and Emissions Trading, a department of the Provincial Government of Newfoundland and Labrador, is a public sector institution whose activities have direct and indirect impacts on nature-based tourism or ecotourism. It is one of the goals of this institution to ensure that industries, facilities and activities that use chemicals are more environmentally conscious by decreasing the amount of pollutants produced. In the 2011 Energy Efficiency Action Plan, Premier Kathy Dunderdale noted in a letter about energy production and consumption in the province:

Energy efficiency can generate important economic benefits, such as decreased costs to consumers, stronger business competitiveness and greater energy security. At the same time, it can reduce air pollutants harmful to human health, and contribute to efforts to tackle climate change (Office of Climate Change, Energy Efficiency and Emissions Trade, 2011).

The vision of the Office of Climate Chance, Energy Efficiency and Emissions Trading indicates the kind of province that Newfoundland and Labrador is expected to be: "A province where business, households, consumers and governments incorporate energy efficiency and conservation considerations into decision making to maximize economic, social and environmental benefits" (Office of Climate Change, Energy Efficiency and Emissions Trade, 2011). This vision illustrates the government's intention to focus on energy efficiency and conservation. With such a vision in mind, it is expected that the government will focus on activities or practices that reduce pollutants and do not destroy the natural resources on which the tourism industry much depends.

The intention to commence oil drilling in the three communities located on the west coast of Newfoundland became quite clear in the mission statement of the Canadian – Newfoundland and Labrador Offshore Petroleum Board (C-NLOPB) made in 1996. The mission partly indicated that the Board would "interpret and apply the provisions of the Atlantic Accord and the Atlantic Accord Implementation Acts to all activities of operators in the Newfoundland and Labrador Offshore Area; and, to oversee operator compliance with those statutory provisions" (C-NLOPB, 1996). It is abundantly clear from this statement that Shoal Point Energy will begin fracking on the west coast of Newfoundland if it gets approval from C-NLOPB. At the time of writing this paper C-NLOPB had not approved any proposal for fracking but the issue was quite contentious in the communities in the study area of this paper.

Potential Impacts of Oil Drilling by Shoal Energy: Interests and Anxieties

Shoal Point Energy will use hydraulic fracturing as described earlier to drill oil in Western Newfoundland if its proposal is approved by C-NLOPB. Oil exploration and fracking, like any other industry, has positive social and economic impacts. Social impacts include increases in services. Not only will there be a need for people to work for the oil company but there will also be a need for social services. If the number of workers increases there would also be an increase in demand for services and facilities such as accommodation, food and leisure. Economically the oil industry would create jobs and generate additional income and revenue for the local communities. For example, when oil drilling began in Watford City, US, the number of students enrolled at an elementary school increased, the city's economy expanded, and its population grew faster (Dobb, 2013).

Oil production is viewed by many Newfoundlanders and Labradoreans as an opportunity to welcome Newfoundlanders home to work, decrease outmigration of young people, and a way to make the province's economy better. The National Geographic magazine tells the story of a young woman who works in the oil industry as a truck driver. She works in North Dakota away from her family but has been able to save the family's house and has been able to support her family since she took this job. Her pay rose from $600 a week to $2000 a week (Dobb, 2013).

The negative impacts of oil drilling on economies, communities and individuals could exceed the positive social and economic gains. The negative effects could be health-related, environmental, social and economic. Chemicals used in fracking are considered to be company secrets and are not often made known to the general public or governments. The unknown chemicals used in this process pose as potential hazards to human health. For example, in North Dakota, a child who lived two miles from a fracking well experienced severe headaches in the night (Gibson, 2012). Chemicals released into the air could also cause air pollution. The mother of the North Dakota child stopped hanging her clothes outside to dry because the smell was strong and burned her nose. There are also records of leaks in drilling. In a presentation made about fracking at a meeting in Port au Port on April 7, 2013 the presenter indicated that in Quebec, out of 31 wells drilled, 19 have had leakages. The leakages have had adverse effects on water supplies, the sea and plants and animals.

Hydraulic fracturing requires much heavy duty equipment and trucks. For early well pads, each well requires approximately 1,148 heavy trucks and 831 light trucks. At peak well pads, each well will require approximately 625 heavy trucks and 795 light trucks (NTC Consultants, 2011). One of the major concerns about heavy equipment and trucks used by fracking companies is the road traffic they cause. As indicated by a concerned visitor to Newfoundland and Labrador, Shoal Point Energy expects to have one well per 10 kilometers along Newfoundland's west coast, this means heavy and many more transport trucks on Newfoundland highways (Simmonds, 2012). The roads to and from the drilling sites are often narrow and have many curves because of the mountainous terrain.

In some cases, the locations chosen for drilling are relatively small and have low property taxes, if any. People who would be employed by the oil company would require accommodation in the local or nearby communities. Increasing demand for houses or accommodation and services could lead to tax increases in the local communities. This situation could potentially force residents who cannot afford to pay higher rents and cope with the high cost of living to move to other places. An issue in Canada and the US is that landowners do not own the mineral rights of their property. This means, a private property can be taken away if it holds a resource that is in high demand, like oil (Dobb, 2013).

One of the interesting findings of this paper is that most of the jobs generated by Shoal Point Energy or any oil company, are for highly qualified individuals who usually do not reside in or come from the local communities in which fracking is done. This situation quite often creates a sense of rejection among local residents and sometimes antagonism towards employees. Additionally, population increases in local communities could spark off crime rates.

Another major finding is that currently there are no fracking regulations in Newfoundland and Labrador. There are also no institutions to strictly monitor companies that would drill oil using the technique of fracking. Some people are not convinced that C-NLOPB can implement policies that would effectively control onshore drilling since currently its mandate is to regulate offshore drilling only. A case in Pennsylvania indicates what could happen in Newfoundland and Labrador. Deborah Rogers notes in an article titled *Exxon Mobil and the Precautionary Principle* that "…a search of Pennsylvania's Department of Environmental Protection database shows that last year XTO was cited for 81 violations for its drilling activity in the Marcellus. And on Dec. 10, 2010, the company was fined $150,000 for improper casing to protect fresh water" (Rogers, 2013).

The reputation of Newfoundland tourism may be tarnished by fracking even if no immediate negative impacts occur. The perception that tourists would have would change. An Ontario man wrote to the Western Star indicating that, "As a tourist, the very presence of well-drilling and flares burning gas, will not only disfigure the beauty of Gros Morne and its small communities but will definitely discourage my family and me from returning to Newfoundland" (Simmonds, 2012).

There are many communities, local economies and tourism businesses worldwide that have felt the negative impacts of fracking. The United States provides a good example of this situation. A documentary on "Tourism Economics" produced after the April, 2010 oil spill, indicated a substantial decrease in visitor spending. The Lousiana Office of Tourism conducted visitor surveys after the oil spill to estimate the impacts and perceptions of visitors. Some of the findings were that:

"Lost visitor spending is expected to total $295 million through 2013"

"Leisure tourism is expected to experience a $691 million loss compared with the baseline forecast through 2013. This represents a cumulative 2.7% drop from pre-spill projections for leisure travel spending

"However, this is offset by an increase of 3.9% ($395 million) in business visitor spending resulting from the increase of media and company and government officials"

"In total, visitor spending was $2.1 billion in 2010 Q2. Lost visitor spending is calculated at $4 million, 2.0% below the baseline forecast in the 2nd quarter" (Tourism Economics, 2010).

In Alabama, USA there have been similar incidents of negative impacts of the oil industry on tourism.   The Associated Press made the following statements:

"The loss is probably worse than the numbers shown because many merchants, hotels and motels offered large discounts to spur business, Foster said."

"State tourism officials said 1 million fewer people visited Alabama's beaches in 2010 than in 2009. That figure was part of an annual report on the state's top tourist attractions".

"3.6 million people visited Alabama beaches in 2010 compared with 4.6 million in 2009. While the number of visitors to attractions on the Gulf was down, other attractions across the state showed an increase in visitors in 2010" (The Stewart Smith Blog, 2013).

Some critics would argue that the cases cited to substantiate the negative impacts of fracking, and for that matter oil drilling, are not adequate and/or convincing or that they were arbitrarily selected. The counter argument is that fracking has the same possibility to spill oil and contaminate the environment irrespective of the geographical area or type of extraction practised. Tourists are attracted to the geographical areas or destinations cited because of their beautiful beaches and topography. Once these beaches and topography are contaminated by oil spills or other negative impacts, the very resources that attract tourists would be destroyed, leaving tourists without any good reason to visit/revisit the destination.

Conclusion

Newfoundland and Labrador has abundant and unique natural and cultural resources that have to be preserved for future generations to enjoy. The tourism industry in the province depends on the natural and cultural resources for its sustainability. The negative impacts of the 1992 Federal Government moratorium on fishing are still being felt by local communities that used to be dependent on the fishery industry. There is a need to diversify the economy in order to solve economic and social problems such as outmigration, unemployment, and declining incomes. In the past decade the tourism industry has been welcome as a credible vehicle that could make a major contribution to the economic transformation that Newfoundlanders and Labradoreans have been hoping for. This paper has underscored some of the progressive achievements of the tourism industry.   The tourism industry is now at the blink of losing its hard won reputation because Shoal Point Energy, a Toronto based company, has targeted three communities in Western Newfoundland for hydraulic fracking.

Fracking in Western Newfoundland could also have serious environmental impacts on the communities as has happened to some communities in Quebec, Canada and some coastal communities in Louisiana and Alabama in USA. It is therefore necessary to preserve the culture and heritage of the communities of Sally's Cove, Lark Harbour, and Port au Port and its neighbors in the Bay St. George area.   There are few places in Newfoundland that have aboriginal people and French communities with American influence. The communities in Bay St. George provide visitors the opportunity to experience Newfoundland's history, culture and heritage. The area has the potential to become a sustainable tourist destination. The contributions of Gros Morne National Park to the province's economy, tourism and sustainable development should also not be underestimated. The park's reputation would be tarnished and it would be very difficult to attract more tourists to the region if fracking takes place. Fracking poses a major threat to the tourism industry in Newfoundland and Labrador.

The provincial government and the Canadian - Newfoundland and Labrador Petroleum Board should pay serious attention to the primary concern that the residents in the study area of this paper have expressed about fracking – that in the long run, the negative impacts of fracking on the communities, local economies, and the tourism industry would far outweigh the economic benefits. A major concern of the communities to be affected by fracking is justified in the knowledge that in the past decade, the tourism industry in the province has been growing significantly and their communities could epitomize this trend.   Additionally, they genuinely believe the environmental damages that fracking causes are irreversible.   It is always better to be safe than sorry!

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Tourism Organization and Institutional Roles on Different Geographical Levels: What Hospitality Newfoundland and Labrador (HNL) Exemplifies

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Introduction

Tourism is a worldwide industry and multisectoral. The sectors include accommodation or lodging, food and beverage, transportation, meetings/events, recreation, entertainment, sports, and shopping. Tourism is also defined as travel business that thrives on efficient management of both natural and cultural resources. Visits to destinations for cultural experiences or to enjoy natural scenery and attractions are part and parcel of the tourism industry. The industry is organized and managed on different geographical levels: international, national, regional, and local. The organization of the tourism industry and the number and types of institutions that are involved with its management, planning and marketing differ from country to country, region to region, and locality to locality. In a federal state like Canada tourism management, planning, and marketing are done at the national, regional, provincial and local geographic scales.

This paper examines tourism organization in general and how some selected institutions operate at different geographical levels to make the industry sustainable. The focus of the paper is, however, on the organization of tourism at the local level and the institutional roles of Hospitality Newfoundland and Labrador (HNL) in the development of the tourism industry in Newfoundland and Labrador since its establishment in 1983. HNL plays a significant role in the tourism industry in Newfoundland and Labrador. It leads, supports, represents and enhances the province's tourism industry. The paper also analyses what HNL has done to facilitate tourism development in Newfoundland and Labrador. The analysis indicates that although tourism institutions operate on different geographical levels their operations could interconnect, interrelate and interact like the components of a dynamic system.

The remaining sections of the paper are presented under the following headings: Research Methodology, Literature Review, International Institutions, National Institutions, Regional Institutions, Provincial Institutions, and Local Institutions. The roles and major contributions of selected tourism institutions operating on different geographical levels are discussed in the context of a systems model. The major research findings and some pertinent recommendations are offered in the final section of the paper for policy consideration by all stakeholders in the tourism industry of Newfoundland and Labrador.

Research Methodology

The methodology used for this paper included extensive research on the websites of the selected institutions operating on different geographical scales: international, national, regional, provincial and local. The international institutions selected are the United Nations World Tourism

Organization (UNWTO), United Nations Educational, Scientific and Cultural Organization (UNESCO), and the World Travel and Tourism Commission (WTTC). The national institutions selected are the Canadian Tourism Commission (CTC) and the Tourism Industry Association of Canada (TIAC); and the regional institutions are the Atlantic Canada Tourism Partnership (ACTP) and Atlantic Canada Opportunities Agency (ACOA). At the provincial level, the institutions selected are the Department of Tourism, Culture and Recreation (DTCR) and Hospitality Newfoundland and Labrador (HNL). The institutions selected for the local level in Western Newfoundland are Go Western, the Western Destination Management Organization (WDMO) and the Gros Morne Institute for Sustainable Tourism (GMIST) and those selected for Eastern Newfoundland are Destination St. John's (DSJ), the DMO for the capital city, St. John's.

In addition to researching on the websites of the selected institutions, relevant tourism textbooks and journal articles were read. E-mail correspondence with the Chief Executive Officer (CEO) of HNL, Carol-Ann Gilliard, and the responses to a questionnaire survey provided detailed information about the institutional roles that HNL plays in the tourism industry in Newfoundland and Labrador. The questions were about HNL's organization, programs and projects, membership benefits and the challenges it had been facing (see Appendix). Personal communication via e-mail with operators of small tourism businesses who are members of HNL to assess the role HNL plays was attempted. However, this effort was not fruitful. Some information about the operations of HNL was obtained through participant observation at the 2013 HNL annual conference in St. John's.

Literature Review: The Selected Institutions

Institutions operating on different geographical levels (Figure 1) play vital roles in tourism development. All the institutions selected for this paper play important roles in the tourism industry. Their roles include planning, development, promotion and marketing of destinations, sites and attractions (Goeldner & Ritchie, 2011, p. 71).   The organization of the tourism industry and the roles played by the selected institutions are analysed in the next sections.

Figure 1: Institutional levels of tourism development

International Tourism Institutions: UNWTO, WTTC and UNESCO

Goeldner and Ritchie (2011) maintain that international organizations provide moral and functional leadership which coordinates and strengthens the visibility and effectiveness of tourism organizations. This role in turn affects public-sector governance and private-sector functionality. The three selected tourism institutions operating on the international scale are UNWTO, WTTC and UNESCO.

UNWTO is the most recognized and leading international organization in the travel and tourism industry (Goeldner & Ritchie, 2011). Its headquarters is in Madrid, Spain. It is a specialized agency of the United Nations (UN) that acts as a global forum for policy issues and a practical source of know-how for its members in the global tourism industry (Goeldner & Ritchie, 2011; UNWTO, n.d.). Its membership is made up of 154 countries, seven territories and over 400 affiliate members which represent local government, tourism associations, educational institutions, and private-sector companies including airlines, hotel groups and tour operators (Goeldner & Ritchie, 2011; UNWTO, n.d.). Overall, UNWTO contributes to the development of responsible, sustainable and universally accessible tourism, paying particular attention to the transfer of tourism know-how to developing countries (Goeldner & Ritchie, 2011; UNWTO, n.d.).

UNWTO strongly encourages all stakeholders in the tourism industry to adhere to the *Global Code of Ethics for Tourism* that ensures that member countries, destinations and businesses maximize positive economic, social and cultural effects of tourism and fully reap its benefits, while ensuring that negative social and environmental impacts are minimized (UNWTO, n.d.). Essentially, this code promotes sustainable tourism development. Statistical and market research, and human resource development are areas which UNWTO is well known for. Elimination or reduction of governmental measures that affect international travel, standardization of requirement for travel documentation and improving the quality of tourism through liberalization, access for travellers with disabilities, safety and security, and technical standards are also key goals of this institution (Goeldner & Ritchie, 2011). Currently UNWTO is working on poverty alleviation and elimination through sustainable tourism, protecting children from sexual exploitation in tourism, crisis management, ecotourism, and safety and security as its key projects (Goeldner & Ritchie, 2011).

The World Travel and Tourism Council (WTTC) was established in 1990. It is led by a 19 member executive committee which meets twice annually. WTTC is made up of 100 global business leaders (presidents, chairs and chief executive officers) from the world's foremost travel and tourism related companies. It represents the private sector in all parts of the industry worldwide. Membership on the council is by invitation only. Daily operations of WTTC are carried out by its president and small staff and they take place at the organization's headquarters in London, England (Goeldner & Ritchie, 2011; WTTC, n.d.).

WTTC's vision for the industry is to establish partnership among stakeholders. The vision underscores the importance of governments at all levels to recognize travel and tourism as a priority business; balanced economics with people, culture, and the environment; and a shared pursuit of long-term growth and prosperity (Goeldner & Ritchie, 2011). Goeldner and Ritchie

(2001) further point out that the mission of the organization is to raise awareness of the economic and social contribution of the travel and tourism industry and to work with governments on policies to enhance the industry's ability to create jobs and generate prosperity. The organization also aims to raise the awareness that travel and tourism is one of the world's largest industries, which supports more than 258 million jobs globally and generates 9.1% of the world gross domestic product (GDP) (WTTC, n.d.). The ability to measure the size and growth of the industry is a key concern of WTTC. In recent years, WTTC has developed a system to estimate the economic contribution of the industry to 181 countries, 20 regions and the world (WTTC, n.d.).

UNESCO, on the other hand, was the outcome of the Conference of Allied Ministers of Education (CAME) in 1942 in the United Kingdom. It was established in 1946 with its headquarters located in Paris, France. In 2011 UNESCO was made up of 194 member states and 8 associate members (Addo, 2012; UNESCO, n.d.). Currently the governing bodies of UNESCO include the General Conference and an Executive Board. The general conference is made up of representatives of the state members and it meets biannually. The general conference determines policies and the main lines of work of the organization and its duty is to set the programmes and budget of UNESCO (UNESCO, n.d.).

Presently the executive board of UNESCO consists of 58 members who are elected by the General Conference that meets twice annually. It assures the overall management of UNESCO by preparing the work of the general conference and ensures that its decisions are properly carried out (UNESCO, n.d.). The board's functions and responsibilities are primarily derived from its constitution and from rules established by the general conference (UNESCO, n.d.). With regards to tourism, UNESCO plays a major role in tourism education, cultural and heritage tourism and sustainable tourism development. UNESCO designates places, monuments and attractions as world heritage sites and also promotes tourism development that is environmentally sound, socially equitable, culturally sensitive and economically just (Addo, 2012). For example, in the province of Newfoundland and Labrador, the Gros Morne National Park and L'Anse aux Meadows National Historic Site are designated UNESCO world heritage sites.

National Tourism Institutions: CTC and TIAC

On the national level of tourism organization, it is important to have at least one institution to plan and manage the country as a tourist destination. The institution could also monitor and promote the destination, coordinate its development and establish the major markets it seeks to attract (Goeldner & Ritchie, 2011). In Canada two institutions that perform such functions are the Canadian Tourism Commission (CTC) and the Tourism Industry Association of Canada (TIAC).

CTC is an organization funded by the federal government, and is run by a board of directors. It was founded in 1995 and its headquarters is in Vancouver, British Columbia. CTC promotes the Canadian tourism industry in order to capitalize on one of the fastest growing international industries (Goeldner & Ritchie, 2011). The commission is accountable to the National Minister of Industry, who relays any information back to Parliament. Information obtained from CTC's website indicates the commission is made up of marketers and innovators who promote Canada around the globe and introduce the authentic and exotic aspects of the

country to world travellers. The commission works in partnership with other stakeholders in the tourism industry. It "designs, delivers, and funds marketing and research initiatives in partnership with provincial and regional tourism associations, government agencies, hoteliers, tour operators, airlines and attraction managers" (Goeldner & Ritchie, 2011, p. 83). Goeldner and Ritchie (2011) point out that CTC has one of the most comprehensive tourism programs in the world that many other nations strive to replicate.

CTC's website outlines the institution's mandate, mission, core values, vision and work. Its mandate is to sustain a vibrant and profitable tourism industry; to market Canada as a desirable destination; to support a cooperative relationship between the private sector and the federal and provincial/territorial governments with respect to tourism; and to provide information about Canadian tourism to the private sector and to the federal and provincial/territorial governments. CTC's mission is to "harness Canada's collective voice to grow tourism export revenues" (CTC, 2013). CTC's core values are innovation, respect and collaboration. CTC maintains international tourism revenue streams coming into the country.

The literature review further indicates that CTC's vision is to inspire international tourists to come explore Canada, by promoting a compelling and consistent image of the country in the international tourism marketplace. The work of the commission includes: directing advertising and marketing campaigns which are run in partnership with key stakeholders; managing media and public relations to develop relationships with international media; working directly with overseas travel companies to develop and sell Canada as a vacation destination; participating in meetings, conventions and incentive travel program to create business opportunities for various Canadian partners; ensuring that social media is important to the overall marketing strategy; and undertaking research programs that act as a catalyst to success and contribute to the country's competitive edge (CTC, 2013). The information on CTC's website suggests that Canada's tourism industry is being developed and marketed in partnership with federal and provincial/territorial governments.

Equally important to the Canadian tourism industry is the Tourism Industry Association of Canada (TIAC), an institution that was established in 1930. TIAC has its headquarters in Ottawa, the country's capital city, in the province of Ontario. TIAC is made up of members from all regions of the country and it is the only tourism institution in the country with representatives in all the sectors of Canada's tourism industry. TIAC is keen on representing and advocating for every sector of the tourism industry in Canada. Currently, TIAC represents tourism interests at the national level and its advocacy work promotes and supports policies, programs and activities which benefit the industry's growth and development (TIAC, 2013).

TIAC's members include providers of air and rail services, airport authorities, local and provincial destination authorities, hotels, attractions and tour operators. TIAC's website information further indicates that the institution has over 300 members and thousands of affiliate members; over 1.6 million Canadians whose employment depend on the economic activity of the industry; large national and multinational companies as well as small and medium-sized enterprises. The businesses and tourism products that TIAC promotes and helps to market include attractions, concert halls, convention centres, duty-free shops, festivals & events, restaurants & food services, arenas, transportation systems, travel services and trade including the media, destination and provincial/territorial marketing organizations, suppliers, and

educational institutions. This broad range of members and activities enables TIAC to address diverse issues facing the tourism industry (TIAC, 2013).

Regional Tourism Institutions: ACTP, ACOA and GMIST
The main goal of regional tourism organizations is to attract tourists to specific geographic regions or destinations (Goeldner & Ritchie, 2011). The geographical region that this paper focuses on is Atlantic Canada which consists of the provinces of New Brunswick (NB), Newfoundland and Labrador (NL), Nova Scotia (NS) and Prince Edward Island (PEI). The tourism industry in this region accounts for almost 6% of the region's gross domestic product. The tourism industry in the region also generates several job opportunities. Three notable institutions working to promote and market tourism in the Atlantic region are the Atlantic Canada Tourism Partnership (ACTP), Atlantic Canada Opportunities Agency (ACOA), and Gros Morne Institute for Sustainable Tourism (GIST).

ACTP has been promoting and marketing the tourism industry in the Atlantic provinces since 1994 (ACTP, 2012). ACTP's mission is to grow the tourism industry in Atlantic Canada. It uses two research-driven marketing campaigns to market the region in the United States and other key overseas markets. Both campaigns include advertising using different media, travel trade programs and media relations activities. One of the major functions of ACTP is to bring together the four provincial tourism departments and all the tourism associations in the region. It also works in collaboration with ACOA. This partnership is an example of how governments, institutions and providers could work together to achieve a common goal in the tourism industry (ACTP, 2012).

ACOA also works in partnership with ACTP, governments and institutions to strategically promote, market and develop tourism in Atlantic Canada ACTP also works with providers and other partners to promote the region as a tourism destination in international markets. Additionally, it advances the competitiveness and sustainability of the region's tourism industry (ACOA, 2012). ACOA, working as a regional tourism institution, undertook a range of initiatives to support marketing, capacity building and capital investment in 2008-2009. This commitment encouraged and facilitated governments, institutions, providers and other stakeholders in the tourism industry to focus more on strategic investments which led to increased growth and competitiveness of the industry.

Quite recently Hospitality Newfoundland and Labrador (HNL), the major tourism institution in Newfoundland and Labrador, received a substantial investment fund from ACOA. In February 2013 ACOA announced that it would provide $400,000 investment fund to HNL over two years to enable it embark on a long term development of the tourism industry to address needs such as market readiness, quality assurance, sustainable business practices, and improved business viability (ACOA, 2013). This effort is another demonstration of how tourism institutions operating on different geographical levels work collaboratively to promote and grow the tourism industry. The next section examines how the Department of Tourism Culture and Recreation (DTCR) also operates at the provincial level to promote, market, and develop the tourism industry in Newfoundland and Labrador.

Gros Morne Institute for Sustainable Tourism (GMIST) is located in the town of Rocky Harbour. The major tourist site in the area is the Gros Morne National Park, a UNESCO

designated world heritage site. GIST provides training programs to enhance the quality and success of Atlantic Canada tourism operators. It also offers training programs primarily intended to enhance the quality and sustainability of nature-based tourism throughout the region with respect to: sustainable tourism practices, experiential tourism services, and eco-adventure tourism (GMIST, 2013). GMIST's website describes the courses it currently offers:

1. Business Brand Development and Customer Engagement through Social Media – helps businesses focus on key areas of brand awareness in a social media age;

2. Edge of Wedge Experiential Travel – helps businesses learn new ways to market and expand with partnerships and niche market experiences;

3. Beacons of Effective Sustainable Tourism – teaches new way to make businesses more 'green' and learn the importance of sustainability through the three pillars: economics, environmental and socio-cultural;

4. Tourism Marketing 3.0 – helps businesses strategically approach marketing efforts.

The website also indicates the sources of finding for GMIST's seminars and training programs. GMST is funded by its stakeholders: ACOA, Parks Canada, CTC and the four Atlantic provinces of NB, NL, NS, and PEI (GMIST, n.d.). In 2007 ACOA invested more than $600,000 in GMIST to continue its work on raising awareness of the importance of sustainable tourism practices and environmentally sound projects and programs.   HNL and GMIST also work in partnership to offer tourism training and education to business and entrepreneurs in the tourism industry (GMST, 2007).   This joint-exercise further demonstrates the importance of partnerships in the tourism industry.

Provincial Tourism Institution: DTCR
    Goeldner & Ritchie (2011) make it clear that provinces are politically independent from the federal government and they generally establish independent provincial tourism departments to market their unique appeal. The provinces also promote and market their geographical areas as destinations worth visiting. A provincial tourism department is therefore generally created to help grow and develop the tourism industry in a particular province (Goeldner & Ritchie, 2011). The Department of Tourism, Culture and Recreation (DTCR), and Hospitality Newfoundland and Labrador (HNL) are two distinctive examples institutions established in the province of Newfoundland and Labrador (NL) and charged with the responsibility to grow and develop the tourism industry. The roles of DTCR are discussed in subsequent paragraphs of this section while those of HNL, the main focus of this paper, are discussed in a subsequent section.

Information available on DTRC's website underlines its vision, mission and mandate. Its vision is to make the province of Newfoundland and Labrador "a destination of choice, with superior and authentic visitor experiences, a robust cultural identity, and natural and cultural resources that are protected and sustained" (DTRC, 2012a). It was part of the department's mission to support, promote and develop the tourism industry in the province in 2011. Its mandate which has been consistent over the years is to support the development of sustainable economic growth in the tourism, cultural and heritage industries.

DTCR aims to fulfill its mandate by supporting strategic tourism product development,

marketing the province to specific tourist markets, supporting the development of the tourism sector through research, opportunity identification and strategy development, and various funding programs and services (DTCR, 2012a). Its mandate would also be fulfilled by working in partnership with federal, provincial and municipal governments, as well as public and private sector businesses, groups and organizations. The collaborative work with other governments and tourism businesses in the public and private sectors once more underscores the importance of a tourism institution to function like a system, the components of which are interrelated, interdependent, and interact to achieve a common goal.

Since its establishment, DTCR has been responsible for all tourism marketing, research and product development in Newfoundland and Labrador. A landmark project that DTCR has initiated in the province is tagged the "Uncommon Potential – A Vision for Newfoundland and Labrador Tourism". The project, commonly called "Vision 2020", was initiated in 2009. Vision 2020 serves as a blueprint for growth in the industry and brings to light real barriers, innovative strategies and actions needed to boost the tourism industry (DTCR, 2012b). Additionally, the vision brings together the government, entrepreneurs and industry partners to grow, develop and market the tourism industry. DTCR is working hard to double the contribution of the tourism industry to the province's annual revenue by the year 2020. This goal would be achievable if it could work in partnership with all the stakeholders in the tourism industry to develop high-quality, competitive products, and efficient facilities and services the industry needs (DTCR, 2012b). One of the major stakeholders facilitating this effort is Hospitality Newfoundland and Labrador (HNL).

Local Area Tourism Institutions: WDMO and DSJ
Goeldner and Ritchie (2011) recognize the importance of tourism to local communities and the roles that local institutions play in marketing their geographical areas as destinations worth visiting by business and leisure travelers. Planning and marketing of local destinations are usually facilitated by destination marketing institutions often known as Destination Management or Marketing Organizations (DMOs). Goeldner and Richie (2001) describe DMOs as single entities that bring together the interest of stakeholders such as city governments, trade and civic associations, and individual industry suppliers such as hotels, motels, restaurants, attractions and local transportation to plan and market destinations.

In some instances, DMOs act as a link between potential visitors to the areas they promote and market and the businesses that will host them. DMOs could also acts as an information centre, meeting/convention consultants, and promotional agencies for their geographical areas. In Newfoundland and Labrador three institutions play these vital roles in the province's tourism industry. The institutions are the Western DMO (WDMO), which represents the western region of the province, and Destination St. John's (DSJ) the DMO for the province's capital, St. John's.

WDMO is a not for profit organization and has a volunteer board made up of members who have an interest in tourism marketing. It represents the western region of Newfoundland and Labrador, a geographic area that stretches from Port aux Basques to St. Anthony on the island of Newfoundland, and from Southern Labrador to Battle Harbour in Labrador (WGMO, 2013). WDMO's mission is to increase economic development. Tourism is considered an effective vehicle in its vision. The key objectives of WDMO are to be the primary marketing

agency for tourism promotion in the local communities in the geographical area in which it operates, to assist build public awareness of economic development generated by the tourism industry, to organize the available tourism services and products to maximize impact, to provide pertinent tourism information to interested parties, and be a marketing support agency for all members.

The primary factors which influence WDMO's marketing activity and strategic direction are: the tourism assets available in the region, the brand and target market of both CTC and the province, and the way tourism is changing globally with regard to customer preferences and demands, and marketing techniques. With regard to the changing marketing techniques, WDMO is improving the region's presence on the internet by introducing an internet marketing strategy including e-marketing and social media. WDMO attends trade and consumer shows, participates in familiarization trips, and assists in product development and quality assurance (WGMO, 2013).

DSJ uses the capital city's unique history, culture and geographic landscape as pull factors to attract potential visitors to the communities it markets. Like WDMO, DSJ operates under the direction of a board of directors on behalf of its members. Its primary targets are major meetings, conventions and incentive travel, sport and cultural events, and leisure and group tours. DSJ"s main goal is to provide its clients with all tools required for planning various activities and to assist industry professionals and groups to create an unforgettable experience for visitors (DSJ, 2013). In order to facilitate travel to and from the communities in the geographical area that it markets, DSJ provides customized itineraries and information about local attractions and festivals, accommodation, and food and beverage services to potential visitors.

Hospitality Newfoundland and Labrador (HNL): Organization and Roles

This is the main focus of the paper and for that matter a questionnaire survey was conducted to collect secondary information in addition to information extracted from the website of Hospitality Newfoundland and Labrador (HNL).   The questionnaire is provided as an appendix to this paper and analysis of the responses are incorporated into this section. HNL was founded in 1983. HNL defines itself on its website as "a non-profit membership association that leads, supports, represents and enhances the province's tourism industry" (HNL, 2013a). HNL's goals are mainly focused on advocacy, education, adaptation of innovative technology and promotion of a strong member network. Its operational values lie in sustainability, whole industry perspective, environment, technology and accessibility (HNL, 2013a). In its mission statement, HNL claims it is the voice of tourism in the province and provides leadership and direction for sustainability and growth of the tourism industry. In respect of its vision, HNL acts as an advocate for the tourism industry with the government, with the intent of developing the tourism industry through training and education – creating high quality industry leaders with a depth of skills and knowledge. Vision 2020 which was mentioned in a preceding section of this paper is HNL's current advocacy strategy (HNL, 2013a).

 The organizational structure of HNL consists of a board of directors, staff and members. The board of directors is made up of 11 members from different types of establishments in the province. The board works with HNL staff to advance tourism growth and development in the

province (HNL, 2013b). The staff is made up of individuals who perform daily tasks of the organization, ensure that HNL remains a leader in the industry, and help members and the industry in general to achieve their goals (HNL, 2013b). The staff members include the Chief Executive Officer and managers of the following departments: policy and communications; workforce and industry development; Newfoundland and Labrador tourism board; Canada Select Newfoundland and Labrador, and technology; two workforce development coordinators, a membership coordinator, and a provincial training coordinator; and an accountant (HNL, 2013b). HNL currently has approximately 600 members. However, if the members and partners of the five provincial DMOs which HNL works with are included, the organization would have approximately 900 member partners (Carol-Ann Gilliard, personal communication, April 5, 2013). Members are given the opportunity to attend annual conferences to learn about new developments and trends in the tourism industry, and also to network with stakeholders.

The CEO of HNL asserted in her response to the survey questionnaire that it was important for tourism businesses to become members of HNL , and in order for the tourism industry to continue growing, it was important for all stakeholders to work together and in harmony to achieve common goals. This viewpoint underscored the need to work in partnership with other institutions or stakeholders to grow, develop and sustain the tourism industry in the province. The idea of building a network was the impetus for the coming together of several stakeholders and sectors of the industry that gave birth to HNL in 1983. The different stakeholders and sectors realized they were faced with similar challenges and had common opportunities to work together to grow and sustain the tourism industry (Carol-Ann Gilliard, CEO, HNL, personal communication, April 5, 2013).

The CEO also emphasized the need to do tourism business in partnership with all stakeholders in order to reap maximum profit and expressed the need "to establish partnerships and relationships for cross promotions and learning". The CEO explained that the way to do that was to go to a place where you like-minded peers would be found, and that was at HNL. The three main services/supports available to members of HNL to help build a more competitive tourism industry in the province were identified as follows:

1. Advocacy & Communications: HNL plays a primary role in establishing the priorities of the industry, develops advocacy strategies and implements government relations to achieve results. Another arm of this role is to ensure that we are communicating the progress of these priorities as well as gaining input and direction from our members as their needs change over time.

2. Skills & Knowledge Development: HNL provides the important link to the types of training and mentoring that tourism operators need to improve their competitive. The full complement of training supports range from front-line customer service training to market readiness and business management.

3. Membership & Networking: HNL provides opportunities, either in person or online, for tourism operators to build relationships with their peers and suppliers to the tourism industry. Conferences, networking sessions, and the like, provide opportunities for members to make partnerships with other tourism providers or establish bottom-line savings on the services/products they use in their operations.

Leading such a diverse membership can come with benefits and challenges. In response to a question about the benefits that members of HNL receive and the challenges that HNL was facing or had faces in the past, the CEO pointed out that members received exactly what they expected from HNL, and HNL's success was dependent on its capability and flexibility to promptly and appropriately adjust to the tourism business environment which was evolving at a fast pace. As part of its business, HNL has been taking the necessary steps to make its members realize the benefits of working in partnership with it. Among the training programs that HNL had offered in order to enhance the skills, knowledge and quality of its members were: food and beverage service, responsible alcohol service, sales powered by service, SuperHost Atlantic (customer service and tourism awareness training program), TourismTechnology.com, webinar series. Some programs such as Emerit, Ready-to-Work (a national skills development program), and the Canadian Academy of Travel and Tourism were offered in partnership with training companies (HNL, 2013c).

When asked if a member had ever requested a program or resource that HNL did not or does not offer, the CEO admitted that the diverse membership also comes with diverse needs or demands and in the past HNL provided a broad range of products and services to meet all of the expectations of the diverse membership. However it was not as effective and progressive as the industry felt HNL should be. There was therefore a need to develop a new strategy and refocus on provincial level issues, needs and expectations as opposed to individual. Currently, HNL is developing an assessment tool on its website that would provide customized services to its members.

In addition to training programs, HNL also offers other resources to its members. The resources include: the Tourism Assurance Plan (TAP), assistance programs, the Tourism Times newsletter, partner programs, business tools, an annual report, job listings and research (HNL, 2013c). These resources help to achieve common minimum standards and keep members informed and connected to the industry. TAP was developed to help elevate the quality of tourism services and attractions in the province and to ensure that the industry remains competitive. TAP was officially revealed at the 2013 conference (HNL, 2013d). Once TAP is in full operation in 2014, the minimum standards must be met in order for tourism service and attractions to be eligible to participate in provincial marketing and development initiatives, qualify for HNL membership, and participate in activities with regional DMOs (HNL, 2013d). The roles that HNL has been playing in partnership with other stakeholders since its establishment in 1983 have contributed positively to the

Conclusion

Tourism is a global industry that provides the needs of travelers. The success and sustainability of the industry depends on availability and efficient utilization of both natural and cultural resources. Tourism institutions operating on different geographical levels also contribute in different ways to make the industry sustainable. This paper has demonstrated how the contributions of some selected and important tourism institutions operating at the different geographical levels sustain the tourism industry. The different geographical levels of operation were identified as international, national, regional and local

The institutions selected for the study included the United Nations World Tourism Organization (UNWTO), World Travel and Tourism Council (WTTC) and the United Nations Educational, Scientific and Cultural Organization UNESC), operating at the international level); the Canadian Tourism Commission (CTC) and the Tourism Industry Association of Canada (TIAC) operating at the national level; Atlantic Canada Tourism Partnership (ACTP), Atlantic Canada Opportunities Agency (ACOA) and Gros Morne Institute for Sustainable Tourism (GMIST), operating at the regional level; the Department of Tourism, Culture and Recreation (DTCR) and Hospitality Newfoundland and Labrador (HNL), operating at the provincial level; and Western Destination Management Organization (WDMO) and Destination St. John's (DSJ) operating in Western Newfoundland and the province's capital respectively. The focus of the study was on the provincial level of tourism organization and development. Hence more attention was given to HNL

The major findings of the paper are that tourism institutions play an important on all geographic levels. Additionally, it is obvious from the research that irrespective of a particular institution's geographical level of operation, there is always the need to work in partnership with other institutions operating on other geographic levels in order to better meet the needs to both domestic and international tourists. HNL has been able to achieve this. Its mission, vision and objectives bring different tourism stakeholders together in Newfoundland and Labrador, Atlantic Canada, and the rest of Canada and the world. The study has provided a better understanding of how the tourism industry is organized on different geographical scales.

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Appendix – Survey Questionnaire Used for the Interview with Carol-Ann Gilliard, CEO of HNL, April 5, 2013

1. Why do you think it is important for businesses to become a member of HNL?

2. What are some of the program(s) or project(s) you provide to aid in providing a competitive tourism industry?

3. Have you ever had a member request a program/resource that you do not offer? If so, what do you do?

4. What do you hope your members feel they are getting from their HNL membership?

5. Have you faced any challenges leading your members? If so, have you found any solutions?

6. Approximately how many members does HNL have?

The Impacts of Nature-Based Tourism on an Island Destination: Case Study of Iceland

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Iceland's tourism industry has been experiencing tremendous growth, with annual visitor numbers predicted to nearly double to 1.2 million by the year 2020. The nature-based tourism industry is booming, especially across northern Europe, which makes Iceland a highly sought after destination due to its abundance of unique and diverse natural resources. Iceland is said to be one of Europe's last areas of pristine wilderness, due to its Highlands that take up the majority of the country's interior. This paper highlights both the negative and positive impacts of Iceland's nature-based tourism industry, as well as discusses ways in which to improve it. Based on studies conducted by researchers with regards to many of Iceland's natural areas and nature-based activities, certain strengths and weaknesses are evident in each sector. This paper divides the nature-based tourism industry into the following sectors: planning, marketing, management, economic, social-cultural, environmental, and issues of sustainability. Iceland's greatest weaknesses are seen in its planning and management areas, while its strengths lie primarily in its marketing and advertising sector. **Keywords:** Destination; Highlands; Iceland; Impacts; Nature-based tourism

Introduction

Tourism is a vastly growing industry in more and more places around the world. It can be a great tool to utilize for economic and regional development as well as a coping mechanism to generate revenue in times when other industries decline, or in situations such as the bankruptcy Iceland experienced in 2008. Iceland is an island tourism destination with a small population of only 319,000 (Iceland, 2013). It has rich heritage and traditions that have been kept relatively unaltered due to its isolation. Island destinations tend to share many unique similarities that stem from their isolated location, separateness, and uniqueness. These attributes, coupled with Iceland's distance from other regions and ultimately from other cultures, are what drive Icelanders to continue to practice their traditions in order to keep them (Jóhannesson, Huijbens, & Sharpley, 2010). This in turn, creates a unique destination for tourists. The geographic location of each island, of course, dictates its possible natural resources, but the most prominent industry tends to be fishing of some description, however in countries like Iceland, tourism is quickly pushing its way to the top. Although island destinations are now considered the second most visited category of destinations in the world, falling behind historic sites, they have their own unique challenges to overcome.

Accessibility, limited resource availability, and economic dependency are all areas in which islands need to focus on finding effective solutions or ways to cope with such issues if they want to be successful tourism destinations (Jóhannesson, Huijbens, & Sharpley, 2010). Nature-based tourism is a major form of tourism that Iceland caters to. This has to do with the fact that Icelandic nature includes its numerous mountains, glaciers, volcanoes, lava fields, geysers, sand fields, rivers, waterfalls, a varied coastline, and a vast wilderness area which refers to the Highlands that take up approximately 40% of the country's land, as seen in Figure 1 (Sæþórsdóttir, 2010a).

Figure 1. Map of Iceland Indicating Highlands and Study Areas

(Source: Sæþórsdóttir, 2010a)

The Highlands are a main focal point of the nature-based tourism industry in Iceland. They are characterized by harsh and diverse landscapes as well as inaccessibility due to large glacial rivers and extreme weather conditions (Sæþórsdóttir, Hall, & Saarinen, 2011). The Highlands basically form an uninhabited artic desert that spans over most of the country's interior. Nature-based tourism is the focus of this paper because the uniqueness of Iceland's nature is the most prominent element in terms of its image as a destination (Jóhannesson, Huijbens, & Sharpley, 2010). Iceland has been experiencing a large increase in the number of tourists visiting per year. In 2011, approximately 565,611 visitors came to Iceland, which was a 15.7% increase from the previous year (Tourism in Iceland in Figures, 2012). By this token, Iceland is expected to continue to grow as a tourism destination, predicted to bring in approximately 1.2 million tourists in the year 2020 (Tourism in Iceland in Figures, 2009). In the summer of 2011, 79.7% of tourists said that Iceland's natural environment was the major motivating factor behind their decision to visit (Figure 2).

Iceland, as a tourism destination, is often advertised and promoted as being Europe's last wilderness (Sæþórsdóttir, Hall, & Saarinen, 2011). Apart from Russia, Iceland has the largest amount of wilderness area in Europe. This is reason enough to make sure these areas stay well managed in order for them to remain enticing destinations to tourists.

Figure 2. Factors Influencing Decision to Travel to Iceland (%)

The purpose of this paper is to highlight some of the strengths and weaknesses of the tourism industry in one of the largest and most developed cold-water island destinations in the world, Iceland (Jóhannesson, Huijbens, & Sharpley, 2010). It looks particularly at the products offered in Iceland's nature-based tourism industry, which is comprised of ecotourism and adventure tourism (Okech, 2013). The paper is divided into different sections looking at tourism aspects of planning, marketing, management, economic impact, social-cultural, environmental impact, and issues of sustainability. There are numerous research articles written about studies done in Iceland that focus on very specific areas of nature-based tourism, such as a particular location or activity. This paper, however, focuses on the literature and findings of various author's works in order to provide an overview of the positive and negative impacts seen in many elements of Iceland's nature-based tourism industry.

Research Objectives

The objectives of this research are to:
1. Discuss why Iceland is a strong competitor as a global nature-based tourism destination, while also identifying its weaknesses in this industry.
2. Describe how different stakeholders in Iceland's nature-based tourism industry can work to improve the negative impacts it is facing.
3. Identify the challenges the nature-based tourism industry in Iceland face and provide for better management on issues identified.

Significance of Study

This study is significant because it analyzes nature-based tourism in an Island destination, its benefits and challenges. This is achieved through the use of extensive literature review to identify the many aspects in which these benefits and challenges are prevalent in Iceland. The research further highlights the specific elements of this industry in which Iceland excels. It also

looks at the best approach through the understanding of the different protocols involved when visiting natural areas. The challenges discussed in the study allow for future developers to recognize the areas that require the most immediate need for attention. With the particular shortcomings in Iceland's nature-based tourism industry specifically identified, developers can work to find methods to improve these issues, which would aid in making Iceland an even stronger tourism destination.

Methodology

This paper consolidates many of the results and ideas from papers that discuss the different elements of Iceland's tourism industry, in particular those elements related to nature-based tourism. Sections of information are not sourced because they come from my personal knowledge about and experience in Iceland. Some of the papers were case studies on particular tourism destinations in Iceland. Others were case studies on other Scandinavian countries whose findings and concepts were transferrable to the Icelandic nature-based tourism industry. Research studies that involved surveying visitors to particular areas were also included. With the use of the results and analyses made by the authors, these will present a good idea of what Iceland's nature-based tourism industry is doing well and should continue to do, what they need to improve on or develop, and how the country could go about dealing with the issues it is facing.

Literature Review

Nature-Based Tourism Planning
Planning is necessary in order to optimize the socio-economic potential a natural area has to offer as a nature-based tourism destination. It is important for this industry to meet and work together to establish common interests and develop from there (Jóhannesson, Huijbens, & Sharpley, 2010). Planning plays a major role in avoiding potential problems. Though it cannot solve all of the tourism related issues, it can help to minimize negative impacts and maximize economic returns while contributing to the positive attributes of the local community. Appropriate planning initiatives help avoid unnecessary impact and future opportunity loss (Sæþórsdóttir, 2010).

A survey-based study conducted by Anna Sæþórsdóttir, provides an overview of nature-based tourism that is practiced at five different natural area destinations around Iceland (2010a). Data was collected from visitors by means of a survey to find out their response to the area they visited, by asking which aspects met or exceeded their expectations and which ones fell short. Her findings indicated that certain areas are better suited for different visitor target groups. For instance, Icelanders made up 50% of the visitors to Lónsöræfi, but only 14% of the visitors to Landmannalaugar (see Figure 1). Tourists to both of these areas were the most satisfied out of all five targeted locations; while the least satisfied visitors were found in Skaftafell (see Figure 1). In Landmannalaugar, the most common complaint reflected the high number of tourists, which led to crowding. In Skaftafell, many complained about the lack of facilities available. The least amount of complaints came from Mývatn nature reserve and Jökulsárgljúfur (see Figure 1) because they both have a unique landscape that easily hides people, which reduces the feeling of over crowdedness. Mývatn is also more spread out over a large area, which helps to keep the tourists further apart from each other. At areas such as Landmannalaugar, every visitor begins at the mountain hut, making congestion much more frequent. Managers and policy

makers can use this sort of collected data when further planning these areas with visitor experience in mind (Sæþórsdóttir, 2010a).

Planning must be carefully executed in order to avoid land allocation conflicts (Fredman & Tyrväinen, 2010). Unfortunately, there are multiple land-use issues in Iceland concerning infrastructure development related to power plants and a lack of planning initiatives that has caused highly sensitive regions to be randomly transformed into recreation areas. In another survey conducted by Anna Sæþórsdóttir, 60% of the visitors to the mightiest waterfall in Iceland (Dettifoss) said they would be less likely to return if a power plant was built nearby (2010b). Figure 3 shows the areas where actual and proposed power plants are located around the country; a number of them are within the Highlands.

Figure 3. Study Areas and Locations of Existing and Proposed Power Plants
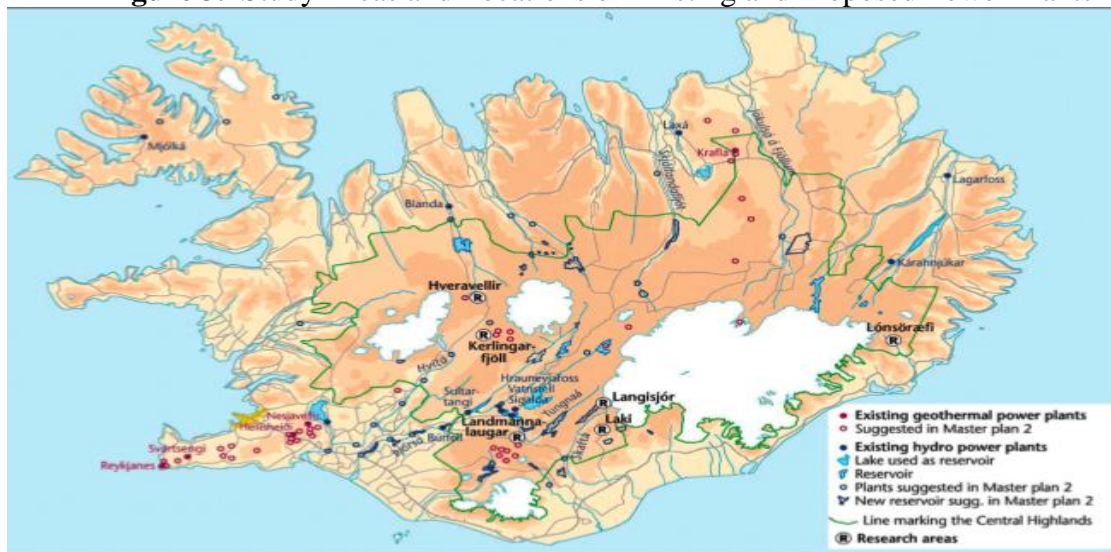
(Source: Sæþórsdóttir, 2010b)

It is still an ongoing debate as to whether or not these power plants should be developed and no final decisions have been made, but there is no way to resolve this conflict that will make both parties fully content. These power plants do not completely ruin the surrounding wilderness and experience of all the visitors, but they do reduce it (Sæþórsdóttir, Hall, & Saarinen, 2011). If the power plants go ahead with construction, planning must be done in order to minimize the effects these plants will have on the tourism industry in this area (Sæþórsdóttir, 2010b). In order to appeal to the largest market segments, the Highlands should be developed for a purist target market and the lowlands for a more urbanist target market (Sæþórsdóttir, 2010a). When planning for a natural area to be used by tourists, it is very important to find the link between the natural environment and the national identity of the area (Fredman & Tyrväinen, 2010). For example, Icelanders as a whole believe in the existence of elves that live in the countryside. Though the younger generation is much less prone to such beliefs, the country still puts forth measures to protect their elves.

An elf expert must first survey a plot of land that is planned for development before proceeding with construction to make sure that no elves or their homes will be disturbed in the process. This is an aspect of planning that must be taken into account before developing a tourism product in Iceland. It is a method for the country to honour and protect part of its national identity. Education and research are other important elements involved in the planning

process. Both local communities and tourists need to be educated on the policies of the particular natural areas in order to understand what is expected of them. Without thorough research done in a particular area, it is hard to foresee enlightened planning initiatives and policies. This is due to the fact that the management team would not have a great deal of information on which to base these important elements. It is vital to gain this knowledge and have strong support for research to be conducted in order to ensure a successful nature-based tourism destination (Jóhannesson, Huijbens, & Sharpley, 2010).

Iceland Tourism Marketing

The demand for nature-based tourism is steadily growing. It has now become the world's most expanding sector in the tourism industry (Fredman & Tyrväinen, 2010). Iceland's natural elements are what most appeal to visitors. Its marketing schemes often rely on the characteristics of its nature and wilderness, which has resulted in slogans such as: 'Iceland Naturally,' 'Nature the Way Nature Made It,' and 'Pure, Natural, Unspoiled' (Sæþórsdóttir, Hall, & Saarinen, 2011). Iceland's "competitive edge" in the global tourism marketplace, comes from its wide variety of tourism products that are made possible by its rich abundance and diversity of natural landscape (Sæþórsdóttir, 2010a). The following graph (Figure 4) demonstrates the importance of Iceland's natural landscape to a visitor's trip. The natural environment is by far the most memorable aspect, as it encompasses 31% of visitors to Iceland. This statistic proves that Iceland's natural landscape should be what is most marketed to current and potential visitors.

Figure 4. Most Memorable Aspect of Visit (%)
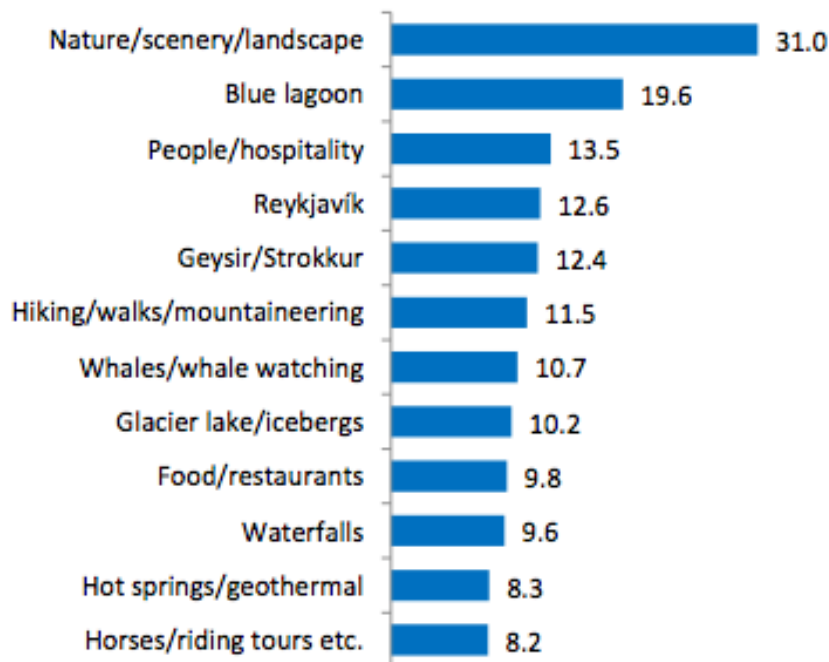
(Source: Tourism in Iceland in Figures, 2012)

With Iceland's main marketing ploy focused around its natural elements, clearly tourism-marketing departments understand their customer base. They know which target groups they should be marketing to and which aspects of their destination to highlight. In a case study

involving the town of Ísafjörður (see Figure 5) in the West Fjords, it developed its tourism industry on the concept of 'Untouched Nature' and marketed it with the focus of expressing its local culture and history.   Though Ísafjörður has not had its own tourism industry for very long, it has been marketing to both domestic and international tourists (Jóhannesson, Skaptadóttir & Benediktsson, 2003). This helps to create a variety amongst the tourists and gain intrigue and desire from potential Icelandic tourists throughout the nation. Ísafjörður has also been promoted as a port of call for some cruise ships, which has brought more tourists into the area and helped it to gain further recognition as a tourist destination on an international scale (Jóhannesson, Skaptadóttir & Benediktsson, 2003).

Apart from image, another important aspect of marketing is figuring out who the target market is for a particular product. It is imperative for stakeholders to know what demographics of people they should be appealing to in terms of facilities and activities, and then how to advertise their product effectively to this target group. For instance, the Icelandic Tourist Board in 2008 conducted a survey at multiple destinations around the Highlands to gain demographic information about visitors to these areas. Their results provided valuable information such as the fact that 51% of visitors to Iceland staying over 15 days visited the Highlands (Sæþórsdóttir, 2010b). This is useful for stakeholders to know because it makes them realize that the longer tourists are staying in the country, the more likely they are to visit areas in the Highlands, which means they should market their product more to longer visiting tourists.

This survey conducted by the Icelandic Tourist Board also provided information that the youngest generation was found visiting Landmannalaugar while the oldest generation was found visiting Hveravellir (see Figure 3). The majority of Landmannalaugar's tourists were comprised of French, Dutch, and German citizens. Areas such as Laki (see Figure 3) and Hveravellir were considered more drive-through destinations, while Landmannalaugar and Lónsöræfi were hiked by almost every visitor (Sæþórsdóttir, 2010b).

Managing Nature-Based Tourism

Nature-based tourism can be considered an even more difficult area of the tourism sector in which to mediate stakeholders. This due to the fact that so many more are associated with this industry than in other forms of tourism because there are the stakeholders who are concerned with the protection, management, and utilization of natural resources directly involved. Careful management measures must be in place across all management parties in order to avoid land-use conflicts and to create and enforce agreed upon rules and regulations (Sæþórsdóttir, 2010a). Data collected from surveying visitors at different destinations can be used by managers and policy makers when further managing these areas along with helping them to analyze and decide how to respond to current and future issues. Iceland is now putting emphasis on designing management policies that meet the expectations and desires of the visitors, instead of trying to determine a precise usage limit of each area. In order to determine an appropriate carrying capacity, it is important that stakeholders decide what kind of tourism and visitor experience is intended for each area. Of course, not every visitor will have the same level of satisfaction at an area, but the goal should be to please as many as possible (Sæþórsdóttir, 2010a).

In the town of Ísafjörður, their tourism industry boasts a very cohesive management system. From the beginning of their nature-based tourism industry development, Ísafjörður made a point of emphasizing on the value of networking and cooperation between the major stakeholders. These three major stakeholders are the members of the Tourist Bureau, the West Fjords Development Agency, and the municipal authorities.   The head members of these

committees actually informally meet during the week for chats. These members believe that it has proved to be quite important to have good networking between the three stakeholders (Jóhannesson, Skaptadóttir & Benediktsson, 2003).   The informality of their meetings and cooperation seems to make the three that much closer-knit and willing to work together to cope with tourism strategies. So far, the town's tourism initiative has not networked out beyond the locality, but it could be very beneficial for an up and coming unique Icelandic nature-based tourism destination to form partnerships with other tour operators around the country (Jóhannesson, Skaptadóttir & Benediktsson, 2003).   Horse tour companies make up a sector of the nature-based tourism industry that, as a whole, do not seem to have a good grasp on management strategies. The operators tend to focus more of their interest in the horses themselves and in the desires of the guests instead of running a profitable business (Helgadóttir & Sigurðardóttir, 2008). While this focus of interests is noble and attractive to visitors, it is not necessarily the most effective way to make sure one's business is generating as much profit effectively as it could.

In a study conducted by Guðrún Helgadóttir and Ingibjörg Sigurðardóttir, they were able to interview owners and operators at 42 horse tour businesses to get a better understanding of how these sorts of businesses are run (2008). Most of them are located in the periphery and are family-run or employ only a few people. An interesting thing to note is that many of these owners and operators that participated in this study did not feel comfortable using the word 'tourist' to refer to their guests, as they always want them to feel as if they are part of the family. Visitors to their operations are treated much more like companions and their services to them reflect that, as most are not provided in the conventional ways of catering to the guest (Helgadóttir & Sigurðardóttir, 2008).

This can be a very appealing form of service to many tourists, especially since nature-based tourists tend to want a deeper, more fulfilling experience where they do not feel like an outsider that needs to be catered to. They all seemed very happy and proud of their businesses but had difficulty thinking about the big picture for their company and plans for the future. Many were also very hesitant to discuss any aspect of their business's financial situation, mostly because they did not have sound methods of keeping track of their finances (Helgadóttir & Sigurðardóttir, 2008).   Therefore, it is necessary for Iceland to design ways to help these entrepreneurs to better manage their businesses and plan for the future. Over the past decade the Highlands have seen a rapid increase in tourism popularity, with more and more people wanting to experience this idea of true, undisturbed wilderness (Ólafsdóttir & Runnström, 2011). There are currently projects in progress that are making the Highlands more accessible to visitors by damming rivers and building hydro plants in order to make room for roads (Sæþórsdóttir, Hall, & Saarinen, 2011).

This however, reduces the wilderness value of the region because it no longer fully reflects Iceland's definition of the term *wilderness.* According to the Icelandic Minister of the Environment, *wilderness* is an area of land where no trace of human activity is to be found and the natural landscape develops without any pressure related to human influences; it also must be situated at least 5 kilometers from human structures and other infrastructure and be at least 25 kilometers squared in size or such that one can enjoy solitude and the natural landscape without disturbance form human structures or mechanized vehicle traffic (Ólafsdóttir, & Runnström, 2011).   In many cases, it is hard to find the exact balance between the development and wilderness needed for tourism to be successful in natural areas. However, there is definitely a

clear level of acceptability but this level differs, as it is dependent on the objectives of individual areas (Sæþórsdóttir, 2010a).

Economic Impact

Nature-based tourism is already considered to be the fastest growing economic sector in some northern European countries (Fredman & Tyrväinen, 2010). It is a great way for a country to diversify its economy, however if its development grows too rapidly, the industry could suffer (Jóhannesson, Huijbens, & Sharpley, 2010). For certain communities, tourism can be an economic saviour if their main industry experiences great loss. This was the case when Ísafjörður's fisheries were changed, causing a large population decrease as people had to move to find work elsewhere.

Since the 1990s, the community decided to implement a tourism industry as a coping mechanism and it has taken off (Jóhannesson, Skaptadóttir & Benediktsson, 2003). However, nature-based tourism development is not without conflicts as there are seasonality patterns to battle along with the demand from other industries to use the natural resources for their purposes (Fredman & Tyrväinen, 2010). It is not always easy to determine the exact economic benefits that nature-based, or any other form of tourism is generating in a destination. This is due to the fact that the tourism income is generally spread across multiple different industries that tie into tourism such as restaurants, accommodations, transportation, etc. These types of "regular" tourism products and services still generate the greatest economic impact in nature-based tourism even though they may not boast any particular connection to nature or ecotourism. This is due to the fact that many nature-based tourism activities do not generate very high profits because they frequently do not require fees to participate in (Fredman & Tyrväinen, 2010).

However, a lot of funding is required to keep these natural areas operating, sustainable, and to enhance visitor experience (Reynisdóttir, Song, & Agrusa, 2008). National Parks are seen as strong drivers for economic development in the nature-based tourism industry, but many of them require extra funding than what they receive from the government (Fredman & Tyrväinen, 2010). This has led to the difficult debate as to whether these areas should be considered 'public good,' or whether they should take a 'user pays' view and charge for visitors to use the natural areas. In a survey study conducted by Maria Reynisdóttir, Haiyan Song, and Jerome Agrusa, they found that over 92% of the 252 respondents at Gullfoss and Skaftafell would be willing to pay a small entrance fee to visit these areas (2008). Gullfoss is a beautiful waterfall that is a part of the Golden Circle tour at Þingvellir National Park found just outside of Reykjavík (see Figure 1) and Skaftafell is a former national park that is now part of Vatnajökull National Park (About Vatnajökull National Park). By implementing a modest entrance fee of ISK 333 ($2.75 USD) at Gullfoss and ISK 508 ($4.20 USD) at Skaftafell, this would generate approximately ISK 105.3 million ($870, 248.69 USD) to put towards improving and maintaining these areas (Reynisdóttir, Song, & Agrusa, 2008).

A major area of economic growth in this sector is the increasing urbanization and commercialization of outdoor recreational activities. Many tourists tend to want the nature-based experience but with high levels of service and comfort (Fredman & Tyrväinen, 2010). This creates a challenge for stakeholders to decide the level of services and facilities their destination should possess without decreasing the experience of their visitors who prefer a more primitive destination. They must work to find the best balance of wilderness and facilities for each natural area in order to appeal to and satisfy the largest number of guests. This in turn would create the greatest economic gain for each of these areas. A relatively recent issue that is

challenging some nature-based tourism activities around the world is the increase in use of artificial recreation environments (Fredman & Tyrväinen, 2010). These include rock climbing walls, indoor golf screens, swimming pools and hot tubs, snorkeling pools, horse riding in enclosed areas, etc. These artificial environments do not provide participants with the real, natural experiences they would get by doing these sorts of activities in a natural setting. This can cause strain on nature-based tourism activities from an economic standpoint because some tourists feel satisfied enough by partaking in these artificial natural environments, that they do not desire to have these experiences in a real natural environment.

With this mentality, the level of nature-based tourism businesses' income will decline. While this fad does not yet appear to be having any drastic effects on the nature-based tourism industry, if it continues to gain popularity, it could decrease the level of interest in doing these activities in the natural environment, which could seriously hurt the nature-based tourism industry financially (Fredman & Tyrväinen, 2010).

Social Cultural Impact

The local community is often very integral to the nature-based tourism occurring at a destination (Reynisdóttir, Song, & Agrusa, 2008). There are only a few large, dominating tourism firms in Iceland, the rest are small, usually community or family-run businesses that provide nature-based activities (Jóhannesson, Huijbens, & Sharpley, 2010). There is an example of this shown in a case study on the town of Öræfi (see Figure 5), which is a town of only 100 people in southwest Iceland. Öræfi has experienced a large population decline since the decreasing need for the town's agriculture services, which is their main industry. To cope with such loss, a father and son team began taking tourists along the coastline in a tractor-drawn hay cart while the father told stories of Iceland. They did not do any publicity or networking to promote their small business, but word spread through tour guides and tourists who had visited.

Figure 5. Location of Ísafjörður and Öræfi with Glaciers Shaded

(Source: Jóhannesson, Skaptadóttir, & Benediktsson, 2003)

The local government was trying to find ways to increase employment to keep people from leaving the town, so it appointed this father and son along with a couple of others to create a firm taking tourist groups on adventure hikes in the area, which has grown to be quite successful (Jóhannesson, Skaptadóttir & Benediktsson, 2003). In terms of a social-cultural aspect, there are two main issues in certain Highland areas between the Icelanders and the foreign visitors. In order to maintain long-term sustainability in these natural areas of public use,

the tension that arises between local residents and foreign tourists must be solved. Many Icelanders are involved in domestic travel and enjoy going to areas in the Highlands and Vatnajökull National Park. At Lónsöræfi, a nature reserve, 50% of the visitors are typically Icelanders, whereas only 14% of the visitors at Landmannalaugar are Icelandic because they know the nature areas to go to avoid too many foreigners (Sæþórsdóttir, 2010a).

In a study conducted by Anna Sæþórsdóttir, one Icelander said "one does not bother to go to Landmannalaugar anymore, as it is far too crowded with foreign tourists" (2010a). Many other Icelanders who had partaken in the study expressed similar sentiments. This issue could be reversed by removing some of the facilities at Landmannalaugar, which would presumably make it more appealing to its past visitor groups. There has also been talk of running shuttles back and forth from Reykjavík (Iceland's capital city) to decrease the amount of private vehicles and better disperse the visitors (Sæþórsdóttir, 2010a). At Hveravellir, a foreign cyclist made a comment about coaches, saying: "I hate it when those buses stop here and loads of tourists are dumped out to take pictures and then they are off again… They miss what it is all about…" (Sæþórsdóttir, 2010b).

This demonstrates the wide range of tourists that are visiting these nature areas. Some are happy enough just passing through an area to see it and being able to say they've been there, while others need to truly experience an area by spending more time in it and being 'closer' to nature. Due to the issues involving visitor groups with differing expectations of natural areas and over crowdedness, many Icelanders are now visiting more remote areas of the Highlands. However, foreigners who tend to be more serious about their trek visit these remote wilderness areas and Icelanders are sometimes regarded as disturbances to these foreign visitors. This is due to the fact that Icelanders tend to camp in these areas and spend the night drinking, singing, and having fun, while foreigners seem to wish to sleep in order to wake up refreshed for the next day of hiking. Park supervisors do tend to direct foreign visitors to camp in different areas than the Icelanders when they arrive, but this method is not always effective (Sæþórsdóttir, 2010a). Though it may seem discriminatory, the implementation of signage at entrance points to these nature areas, designating certain rowdier groups to one area and more serious hiking groups to a separate area could help improve the experience for all visitors.

Environmental Impact

Iceland experiences a substantially large influx of tourists during the summer months in comparison to winter months, especially of nature-based tourists. This is evident when looking at the statistics in Figure 6, which shows a clear peak of tourists visiting Iceland in the summer season.

Figure 6. Visitors By Season – Proportional Distribution.

	Proportional distribution (%)	
	2010	**2011**
Spring	11.2	12.9
Summer	49.5	49.0
Autumn	16.3	16.7
Winter	23.0	21.4
Total	**100**	**100**

During the summer there is 24-hours of sunlight and the weather is much warmer due to the warm air brought up from the Gulf Stream, which makes it much more pleasant for most to experience nature-based activities in. The winters in Iceland are much less attractive to tourists, especially those wanting to experience nature because they can be to the extreme and also due to the near 24-hours of darkness that is experienced to contrast the summer's midnight sun. This drastic change is a major reason for almost half of all tourists choosing to visit in the summer months. Iceland's vegetation has a very short growing season, which makes many plant communities very vulnerable (Sæþórsdóttir, 2010a). This means that this abundance of tourists over the summer months can be seen as a threat to Iceland's extremely fragile ecosystem, especially in its natural areas such as the Highlands (Ólafsdóttir & Runnström, 2011). A real nature experience differs from person to person and this is dependent upon the visitor's expectations of what the experience includes. This could be affected by the amount and quality of services and facilities at a destination, whether or not motorized vehicles are desired, the different types of environments and their combination with culture, heritage, and education (Fredman & Tyrväinen, 2010).

Regardless of what their expectations are, it is imperative that Iceland's natural resources be protected and enhanced because they are what nature-based tourists want to experience. Iceland's subarctic climate makes its natural elements extra fragile and vulnerable to degradation. Trampling, littering, and disturbing the wildlife are all major ways in which the nature-based tourism industry can be threatened (Reynisdóttir, Song, & Agrusa, 2008). There have been measures put in place to avert environmental degradation such as building a bridge in Landmannalaugar to stop the vegetation from dying due to trampling. This has helped to increase the flora population but at the cost of decreasing visitors' direct connection with nature (Sæþórsdóttir, 2010a). In a study conducted by Anna Sæþórsdóttir, she found that many of the visitors to Landmannalaugar made comments along the lines of: "the natural environment is clearly very sensitive here and probably can't cope with the number of visitors who come by" (2010b).

Due to the country's abundance of volcanic activity, the soil in Iceland is mainly comprised of volcanic ash and is therefore very susceptible to erosion (Sæþórsdóttir, 2010a). A current issue being faced is the number of horses out on the trails used for horse tours. These animals are helping to destroy the limited vegetation and erode the soil. Horse tours are very popular through Vatnajökull National Park because they can take tourists to areas they would not be able to see otherwise due to the harsh terrain. Multiple day tours require more than one horse per person as to not tire them out too much. This can create a large herd of horses trampling down trails. There is a lack of adequate trails, fences, and enclosures to keep horses in particular areas. These horse tours have also been problems for hikers as they are seen as an eyesore to certain visitors who want to experience the real pristine wilderness they were promised (Helgadóttir, 2006). Another environmental issue that Iceland is currently facing with regards to nature-based tourism is the debate over electric power plant production in the Highlands. In Vatnajökull National Park, there are plans in place to build up the infrastructure with electrical power plants due to the abundance of glacial rivers and geothermal areas. This, however, would result in degradation of the wilderness.

There are almost no trees in the Highlands so the buildings, dams, canals, reservoirs, power lines, roads, and noise that come along with power plant production, would all drastically affect the landscape's appearance and, essentially, the visitors' experiences in this national park. These plants also often cause waterfalls to diminish or disappear completely, along with causing

rivers and canyons to dry up, and vegetation disappearance underneath the reservoirs (Sæþórsdóttir, 2010b). There has been a lack of clear, sustainable long-term tourism goals and environmental planning in the Highlands area, which has caused power plant construction to slowly creep in (see Figure 3) (Ólafsdóttir & Runnström, 2011). Without plans in place to either stop this production from happening or at least confining it to areas that least affect the natural resources, nature-based tourism activities could be greatly affected in a negative way.

Issues of Sustainability

Sustainability should be a key objective to improve when planning and managing a nature-based tourism destination or product (Fredman & Tyrväinen, 2010). Policies need to be put in place to regulate different elements of a destination and to follow best practice guidelines (Jóhannesson, Huijbens, & Sharpley, 2010). These need to be specific and include elements such as carrying capacity, hunting and fishing allowances, trail designation, and rules in relation to flora and fauna interaction. There also needs to be signage to relay the policies to visitors, along with authorities to enforce the rules and regulations put in place. By not working to make destinations more sustainable, the future for this tourism sector is bleak. Sustainability and nature-based tourism do not always go hand in hand, although it is best to strive for both at a destination or as a product. There has been a large expansion of natural resource exploitation in the Highlands over the last ten years, which hinders the sustainability of an area (Ólafsdóttir and Runnström, 2011). Unfortunately, motorized vehicles are often used to bring tourists to nature (Fredman & Tyrväinen, 2010). The different tourism destinations in Iceland are so far apart and usually in very harsh landscapes, that the use of unmotorized vehicles instead is simply ineffective. The use of different motorized vehicles does however generate lots of income for small transportation businesses, which aids the local communities financially (Fredman & Tyrväinen, 2010).

Iceland has promoted its use of the Green Globe Certification as it does have select 'green' businesses. It also has a working committee that focuses on combatting the environmental issues that tourism is causing in the country. However, there are still no regulations or legislations put in place that require entrepreneurs in the tourism industry to follow best practice guidelines. Unfortunately, this has caused most of Iceland's tourism companies to be without any formal international certification recognition. In order to achieve sustainable development, regulations need to be put in place so businesses can have some form of guidance to making their product or service more sustainable (Jóhannesson, Huijbens, & Sharpley, 2010). One of the fastest growing sectors of the world tourism market is the whale-watching industry, and Iceland is a major player in this market. In 2002, this industry was experiencing an annual growth of about 250% since it began in 1990. Húsavík is a small town in northern Iceland that is marketed as being 'one of the best spots in the world to watch whales.'

This activity is widely recognized as bringing in large profits for the Icelandic economy and giving Iceland a very positive image in the eyes of tourists and potential tourists (Parsons, & Rawles, 2003). However, commercial whaling was reintroduced in 2006 after being prohibited in 1989. According to the Natural Resources Defense Council, Iceland alone was responsible for killing hundreds of whales, some of which were endangered, and shipping more than 750 tons of whale meat and products to Japan. There have been attempts by the United States and conservation groups to negotiate with Iceland in regards to their whaling industry, but so far it is still going on (End Commercial Whaling). The Icelandic government did not seem concerned that resuming the commercial whaling industry might impact their very profitable whale-

watching industry, believing the two could coexist. In countries such as Japan and Norway, both whaling and whale-watching activities are practiced (Parsons & Draheim, 2008).

This does back up the Icelandic government in saying both can coexist, but this does not necessarily mean it is what is best for the country in terms of profits and sustainability. The cultural and environmental values of tourists in terms of what factors repel or attract them to whale-watching need to be evaluated in areas where whaling is to be resumed in order to determine the effect it will have on the nature-based tourism industry (Parsons & Draheim, 2009). A study done by Parsons and Rawles was conducted before commercial whaling was reintroduced, and surveyed whale-watching tourists in Iceland to determine whether they would go whale watching in or even visit a country that was conducting whaling operations (2003). A similar study to the latter was conducted in the Dominican Republic, also by Parsons, that surveyed tourists on their likelihood to visit a country for a holiday based on its support of whaling or whale conservation. This study concluded that 77.1% of the tourists said that they would be less likely to visit a country on holiday if it supported the hunting or capture of whales or dolphins. An even larger number of tourists (81.1%) said that they would be more likely to vacation to a country that has a strong commitment to the conservation of whales and dolphins (Parsons & Draheim, 2009).

This demonstrates the need for the Icelandic government to really consider whether or not it is beneficial to continue to support whaling in its waters. Since the commercial whaling industry has been resumed, there does not appear to be a similar study conducted in order to determine whether or not whale watching numbers have decreased significantly and whether or not tourists are repelled by Iceland's whaling resumption. There is great potential for a country to profit more from whale watching than commercial whaling (Parsons & Rawles, 2003). If Iceland can generate more profits by stopping their commercial whaling industry and using the whales to generate profits in non-consumptive ways, then it makes sense for them to do so. This would keep conservationists from constantly trying to negotiate a way to end this seemingly unethical industry and allow their whale watching industry to be more sustainable.

Discussion

Positive Impacts of Iceland's Nature-Based Tourism

Iceland is a very strong competitor as a tourism destination on a global scale. It is a perfect country for nature-based tourism to flourish as an independent sector because of the amount of rich and diverse natural resources found throughout the landscape (Sæþórsdóttir, 2010a). Visitor numbers to Iceland have been steadily increasing (Figure 7) which means that the country as a whole is successful as a tourism destination, however this does not mean there are not ways it can be improved. There are areas in which Iceland excels and others that require assistance. Iceland is very fortunate to have such an abundance of unique natural elements to offer tourists at a time when nature-based tourism is now the most expanding sector of the tourism industry across the globe (Fredman & Tyrväinen, 2010). By marketing it as being a destination focused around experiencing nature in its purist form, the growing population of nature-based tourists will continue to be intrigued. Keeping the nature theme present throughout the majority of Iceland's tourism advertising makes it seem like a unified destination.

Figure 7. Visitors to Iceland 2000-2011.

VISITORS TO ICELAND 2000-2011

(Source: Icelandic Tourist Board, 2012)

It also projects to a potential tourist that no matter what part of the country one visits or what activity one participates in, nature will always be present. Many of the Old Icelandic traditions are still a strong part of the Icelandic culture today. There are many different festivals held around the country, traditional foods such as hákarl (rotten shark) are still eaten, and the shearing, spinning, and annual round up of sheep are still practiced (Characteristics of the Icelandic wool).

Icelanders have also been very diligent in ensuring their Icelandic language has been kept very well preserved and remained almost unchanged since the Viking age. The preservation of their culture can be another very enticing feature of a destination for tourists and can go hand in hand with certain aspects of nature-based tourism. Even though traditions such as their belief in the existence of elves, hinders some tourism development, Icelanders refuse to let their traditions be compromised. Iceland's small population size aids with the level of cohesiveness and strength the country has in terms of its people. Many small communities have had to come together to use tourism as a means of coping with declines in the local industry(ies). Evidence of this is shown in cases similar to that in Ísafjörður where the community members took it upon themselves to develop and promote their own tourism industry with hopes of increasing their declining local economy (Jóhannesson, Skaptadóttir & Benediktsson, 2003). As a whole, Iceland is very welcoming to foreign visitors, which helps greatly with making tourists feel more comfortable and that their presence is wanted. Tourists, when visiting more locally based tourism business in the smaller communities, feel especially welcome. The fact that the smaller horse tour companies have a hard time using the word "tourist" to refer to their guests indicates the type of friendly and inclusive mentality most Icelanders possess (Helgadóttir & Sigurðardóttir, 2008).

Feeling accepted by the local people of an area is a desired feeling for many tourists, especially those who travel more for natural and cultural experiences. Some of the many issues Iceland is facing with regards to different aspects of their nature-based tourism industry are currently being addressed with possible solutions taking shape. It is important to note that

Icelandic tourism agencies are taking initiatives to improve certain problem areas their tourism industry is facing. This shows that Iceland is concerned about the wellbeing of its tourism industry and has motivation to continue to grow and improve. Some of these issues working to be resolved include the management policies being implemented with regards to meeting visitor expectations (Sæþórsdóttir, 2010a). Tourism management agencies are becoming more conscientious of what visitors to Iceland's natural areas are expecting to experience and actively working on satisfying these visitors. They are also trying to find ways to cope with overcrowding at popular nature areas such as Landmannalaugar and coming up with ways to mediate tension between the rowdy Icelanders and more conservative foreigners (Sæþórsdóttir, 2010a).

Not all of the nature-based tourism issues that Iceland is facing are actively being resolved or even addressed, but it is clear that Iceland's tourism industry is eager to move forward and please as many stakeholders and visitors as possible. There are strengths evident in many aspects of Iceland's nature-based tourism industry; if these strengths are utilized to their full potential, there should be no excuse as to why Iceland will not continue to grow in terms of popularity as a nature-based tourism destination. Iceland's nature-based tourism industry boasts much strength, especially with regards to its multitude of diverse natural resources. Tourism marketing agencies have done well in utilizing Iceland's unique natural elements to entice its visitors, with the majority claiming that the natural landscape and scenery was their biggest motivating factor to visit Iceland. Preserving its rich cultural heritage is another way that Iceland is using its available elements for tourism purposes. Often times combined aspects of nature-based tourism and cultural tourism are sought after by nature-based tourists to enhance their experience.

The fact that Iceland is a small country population-wise shows its strength in terms of its unity that makes networking, marketing, and cohesive decision-making that much easier. Its people are also very friendly and welcoming of tourists for the most part which makes visitors feel much more comfortable and free to fully experience everything that Iceland has to offer. While it has been indicated that Iceland suffers from certain nature-based tourism related issues, some of these issues have been addressed and government agencies are actively finding solutions to cope with them. This demonstrates that Iceland's government cares about improving its nature-based tourism industry and should continue to find ways to constantly be doing so.

Negative Impacts of Iceland's Nature-Based Tourism

Even though Iceland is steadily growing on a global scale as a nature-based tourism destination, there are areas of this sector in which Iceland needs to improve. The main issues that are currently causing weaknesses in this industry centre around the planning and management strategies of the nation. First and foremost, stakeholders of the many different natural areas (including national parks, nature reserves, and conservation areas) need to unite and establish a precise target market group for their particular destination. Using demographic information of visitors to particular areas, collected by researchers such as Anna Sæþórsdóttir, provides stakeholders with a basic understanding of what types of people are interested in visiting their product (2010a). As it stands now, Iceland does not seem to have a good grasp on what types of tourists to cater to at which locations and where they could be pleasing a larger market of visitors as opposed to deterring them. This is why areas such as Landmannalaugar are experiencing over crowdedness, especially by Icelanders' standards. A specific target market was not decided on in the planning phase and now it sees an abundance of tourists, which has caused many of Landmannalaugar's previous visitors to no longer return. It is nearly impossible

to please all parties involved, especially in the nature-based sector of the tourism industry, due to the added number of stakeholders that come into play from an environmental prospective (Sæþórsdóttir, 2010a).

Despite this unfortunate reality, tourism planning and management agencies need to make educated decisions on precise target market groups quickly. This is so they can start to be focused on catering to particular groups at their respective destinations before too many tourists visit areas that are not best suited to their needs, leaving them with an experience that is below their expectations. There are also weaknesses present in the planning and management of smaller, typically family-run businesses in small communities. While only horse-based tour companies were discussed, it is pretty safe to assume that the lack of planning and management seen in many of these businesses is also prevalent in other small, family-run tourism businesses around Iceland. Many of the owners and operators of these businesses did not have a good grasp on how their business was doing financially and had no concept of what their plan was for the future of the company (Helgadóttir & Sigurðardóttir, 2008). Either the government of Iceland or tourism planning and management agencies should be aware of this lack of business know-how amongst so many of their country's small nature-based tourism companies. There should be strategies in place designed to help educate small tourism business owners about how to properly manage their business and plan for the future.

Implementing such a program would only help to increase the success of these small businesses, which would help the success of the country's nature-based tourism industry overall. There are also many issues involving land-use allocation. The biggest contenders fighting for land in wilderness areas are the electrical power plant companies that wish to develop infrastructure near natural areas. These facilities have already lowered the wilderness value in certain areas around Iceland due to a lack of planning and restrictions (Sæþórsdóttir, 2010b). Unless planning committees come together to ensure that these plants are constructed in areas that will cause the least effect on the experience of nature-based tourists, wilderness value will continue to decline across the country. If too much random development continues in and around natural areas, Iceland will no longer be able to be considered a destination of pristine wilderness (Sæþórsdóttir, 2010b). Since nature-based tourism is their largest sector of tourism, not being able to market Iceland as being a destination of natural purity could drastically weaken their validity and growing success. There is not ample control over land that is desired by multiple industries, including that of nature-based tourism. With a lack of clear, sustainable long-term tourism goals and environmental planning, especially in the Highlands area, construction of these plants in natural wilderness areas will continue (Ólafsdóttir & Runnström, 2011).

The vegetation in Iceland is very fragile due to its subarctic climate (Reynisdóttir, Song, & Agrusa, 2008). While certain initiatives have been taken at some locations to help their survival, other areas are seeing high levels of degradation, mostly due to trampling from horses on horse tours (Helgadóttir, 2006). More effective strategies need to be put in place and enforced in order to keep these horses on the designated trails and away from vulnerable flora. Horse tours could be prohibited from using trails that are at the greatest risk of severe flora degradation. There could also be more members of authority on patrol to ensure horse troops are sticking to the trails and not wandering off. There is also the issue of these horse tours being irritants to hikers who share the trails (Helgadóttir, 2006). It may be worthwhile to designate certain trails for horse tours and others strictly for hikers at different wilderness areas. While it would mean that the groups would not see the exact same elements, both would get the experience they were expecting.

One final area of Iceland's nature-based tourism industry that is fairly weak is the lack of nature-based tourists in the winter season. The summer months see the largest number of tourists by far, but this does not need to be the case. There are many nature-based activities for tourists to partake in during the winter months; they just are not as frequently advertised. When browsing through Icelandic tourism sites, its very obvious that most of the activities and natural landscapes are shown during summer months. Winter in Iceland should be frequently advertised as well to increase visitor numbers during the off-season. The northern lights are beautiful across Iceland's sky and would be the dream of many nature-based tourists to see, but these sorts of excursion possibilities are not nearly as highly marketed. There are also dog sledding expeditions, cabin-stay, ice fishing, winter camping, snow mobiling treks, and many other activities for nature-based tourists to enjoy. These would also all be done in almost 24 hours of darkness, which should be advertised as a unique experience, as it is not found in many other destinations around the world, just as the midnight sun is a major tourist attraction.

Iceland's major weaknesses in its nature-based tourism industry lie within the planning and management of natural areas and businesses. Stakeholders need to focus on defining a precise target market for each destination, especially those natural wilderness areas in the Highlands. In terms of small, family-run businesses, many seem to be having difficulty with proper management styles, hindering their ability to generate as much profit as they can. Iceland should implement ways in which to provide training and information to these small business owners and operators in order for them to run their businesses more efficiently and effectively. The negative impact horse tours are having on Iceland's fragile vegetation is cause for necessary improvements to diminish the obvious degradation. Finally, Iceland sees a much lower number of tourists over the winter months, which it should be addressing, and actively finding methods to entice potential nature-based tourists to visit during this time. The unique natural resources for visitors to enjoy are available in the winter season, but are not being promoted effectively enough for Iceland to see a more constant level of nature-based tourists throughout the year instead of only over a few summer months.

Conclusion

Iceland is a growing nature-based tourism destination. Being an island nation provides it with unique features that create unique challenges. Iceland is a strong competitor on a global scale in terms of a nature-based tourism destination because of its large amount of diverse natural elements that can be seen. Though it has its strengths, just like any other tourism destination, it has its weaknesses as well. This paper looked at identifying the many strengths and weaknesses of Iceland's nature-based tourism industry by first discussing seven areas that make up this industry: planning, marketing, management, economic impact, social-cultural, environmental impact, and issues of sustainability. Breaking the industry down into these sections helps to show exactly which areas Iceland is handling better than others. In terms of planning, stakeholders are now showing initiatives to try and solve certain issues relating to visitor experience. However, there is still a major lack of planning out exactly what specific target groups should be catered to at which destinations and land-use allocation, especially involving the construction of electrical power plants in pristine wilderness areas used for nature-based tourism.

Marketing to potential tourists with slogans centred around Iceland's pristine natural wilderness is very effective and appeals to many tourists looking for a nature-based experience.

Unfortunately, the planning for specific target market groups is not yet precisely defined, so marketing certain areas to potential visitors whose needs would not be met by such a destination are much more likely to have a lesser experience than expected. The management of larger nature-based tourism businesses and natural areas seems to be fairly well executed, whereas the management of many smaller businesses in little communities around Iceland is not. The economic impact that nature-based tourism can bring to a community is substantial. It is an industry many communities are working to create and improve in order to increase their income and/or supplement a declining local industry. However, in this new day and age of technology, many more artificial outdoor recreation facilities and equipment are becoming popular.

This could have a negative effect on the nature-based tourism industry, making it yet another economically declining local industry. Icelanders are generally very friendly and welcoming towards tourists and have made tremendous efforts to ensure the authenticity of their culture has remained intact. That said there are issues that have recently come to light involving Icelanders and foreign visitors to natural areas, which is causing some tension between the groups. Iceland's natural environment is what makes it such a unique tourism destination, but it has vulnerable vegetation and soils, along with very few wild animal species. The impact that trampling is having on these fragile elements is causing degradation and needs initiatives put in place to counter this negative environmental impact. In terms of sustainability, Iceland does have select businesses that practice 'green' initiatives and have committees designated to tackle the environmental issues before they cause too great of an impact. However, activities such as the reimplementation of the commercial whaling industry pose threats to the success and sustainability of whale watching, which provides a major source of income for the nature-based tourism industry.

Iceland is a country that boasts gorgeous natural landscapes that anyone would be lucky to see. It deserves to be a world-renowned nature-based tourism destination as it provides visitors with a very unique natural experience. An annual steady increase of tourists to the country has been the trend for years, which demonstrates that Iceland does possess much strength in this tourism sector. However, strengths are not without weaknesses and Iceland has many ways in which it can improve the different aspects of its nature-based tourism industry that have been outlined throughout this paper, in order to make it a destination that provides even more satisfaction to its visitors' experiences. Iceland should use the strength it already has as a nature-based tourism destination to combat the issues it is currently facing to ensure long-term sustainable growth in all of this industry's sectors.

Recommendations for Future Research

There are many areas in terms of Iceland's nature-based tourism industry that require more thorough research. For instance, while there are a fair number of studies focused on wilderness areas in the Highlands, more research should be devoted to the businesses that run nature-based tourism activities throughout the country. Investigating the way these businesses are run and their level of customer satisfaction would provide information that could be used to improve them, which would help to increase the overall success of Iceland's nature-based tourism industry. It would also be beneficial to conduct a similar study to that of Parsons and Rawles in 2003 to find out how tourists and potential tourists to Iceland feel about participating in whale watching in a country that has recently resumed commercial whaling. If it is discovered that Iceland's commercial whaling industry is turning away large numbers of potential whale watchers, it could be cause for Icelandic authorities to once again prohibit this activity. Another

area in which future research would be beneficial is the impact nature-based tourism has on Iceland's environment and ecosystems. Knowing more information about the degree to which the vulnerable flora and soil are being affected and where and how they are experiencing the most degradation would help tourism planning agencies determine the need to counteract this issue and how to go about it in the best way possible.

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