

Appendix C12

Tourism Report



**ASSESSMENT OF POTENTIAL EFFECTS of a
WIND PLANT ON TOURISM on
WOLFE ISLAND, ON**

Final Report

Prepared for
CANADIAN RENEWABLE ENERGY CORPORATION (CREC)
A wholly owned subsidiary of CANADIAN HYDRO DEVELOPERS INC.

Prepared by:

PKF
Consulting

February 2007

EXECUTIVE SUMMARY

The establishment of wind plants as an alternative energy source is a relatively new development in Canada and the United States. Consequently there is minimal qualitative or quantitative research available that addresses the link between tourism and wind farms in Canada. Canadian Hydro Developers, Inc ("Canadian Hydro"), through its wholly owned subsidiary Canadian Renewable Energy Corporation (CREC), is proposing to build, own, and operate a wind plant on Wolfe Island in the Township of Frontenac Islands, Ontario. As part of the approval process, Canadian Hydro has requested the services of PKF Consulting to assess the potential effects of the proposed wind plant on Wolfe Islands' tourism industry. Specifically, this report addresses the Ministry of the Environment's 2001 Guide to Environmental Assessment Requirements for Electricity Projects, Screening Criterion 6.3:

Will the project have the potential to have negative effects on recreation, cottaging or tourism?

The Executive Summary highlights the proposed project, the tourism industry of Wolfe Island and the potential effects and implications of the proposed wind plant on the Island's tourism industry. The Final Report contains a more detailed analysis including tourism resources and infrastructure of Wolfe Island; tourism performance indicators and resources for Frontenac County and the City of Kingston; an analysis of comparable wind farm operations in Canada and the U.S., including their effects on the tourism industry; and an assessment of the proposed wind farm on Wolfe Island's tourism industry.

Wolfe Island Wind Farm

The proposed Wolfe Island Wind Project will consist of 86, 2.3 MW wind turbines on the western head of the Island. The wind plant is anticipated to generate 537,000 MW hours per year of renewable energy. Pending approvals, construction of the project is expected to begin in the Spring/Summer of 2007 and be completed by October 2008. In addition to the proposed 86 wind turbines, ancillary facilities will include:

- Access road(s) to each turbine site;
- Above/below ground electrical collector system, including construction of a submarine cable from Wolfe Island to Kingston;
- Pad – mounted transformers located at the base of each turbine;
- Transformer station and ancillary facilities located west of Marysville;
- Operations and Maintenance Building adjacent to the transformer station; and
- Interconnection facilities to the provincial electrical grid within Kingston.

As noted, the project developer is Canadian Hydro. Currently, Canadian Hydro owns and operates 18 power generation facilities including wind, water, and biomass in the provinces of Ontario, Alberta, and

British Columbia. Additional information on the Wolfe Island Wind Project is available on the project website: www.wolfeislandwind.com.

Wolfe Island Tourism Overview

Wolfe Island is the largest of the 1,000 Islands, located at the eastern end of Lake Ontario and the beginning of the St. Lawrence River, directly opposite to the City of Kingston. The Island is about 29 km in length and ranges from a few hundred meters to 9 km in breadth; totaling over 30,000 acres in area. Together with Simcoe Island and Howe Island, it forms the Township of the Frontenac Islands. Within this Township, the majority of business and tourist operations are located on Wolfe Island. Tourist businesses on Wolfe Island include: sixteen accommodations, one marina and two golf courses. Most of these are family owned and operated establishments with less than five staff members that operate seasonally from May to September.

The current population on Wolfe Island is about 1,200, yet it can reach up to 2,700 in the summer months with cottagers. The Island contains about 5% of Frontenac County's resident population year-round. The Village of Marysville is the largest community on the Island. The Island can be accessed by three different ferry services with access to 1) Kingston, 2) Cape Vincent, NY, and 3) Simcoe Island. The service from Cape Vincent requires passengers to traverse Wolfe Island if they are planning on traveling on to Kingston. Consequently, one of the current tourism promotions encourages visitors to "linger longer..." before they make the second leg of their journey.

The tourist industry on Wolfe Island consists primarily of outdoor recreational activities, such as: sailing, bird watching, bicycling, fishing, and hunting. Specific attractions include: the three Ferry services, Big Sandy Bay, Ryan Centre Outdoor Education, a corn maze, horse and sleigh rides, and a number of weekend events held throughout the summer months.¹

Wolfe Island Tourism Performance

The Visitor Information Centre on Wolfe Island is open from Victoria Day weekend through to Thanksgiving each year, and their records indicate a total of about 10,000 enquiries to the Centre in both 2005 and 2006. These include day visitors from the US and Kingston. Total accommodation supply on the Island includes: bed & breakfasts, cottages, and a small hotel, for a combined total of 16 properties and 58 guest rooms. PKF has estimated 6,900 occupied room nights on Wolfe Island as of year-end 2006, which at a 2.25 double occupancy factor and average length of stay of two nights would yield approximately 7,700 overnight guests staying on Wolfe Island last year. This represents approximately 2% of total visits to the Frontenac Townships.

¹ *Socio-Economic Appendix – Environmental Assessment of Wolfe Island, Stantec Consulting, 2006*

July and August bring in approximately 1,200 to 1,500 seasonal residents or “cottagers”, many of whom stay on Wolfe Island for the summer and also attend events in Kingston. Seasonal dwellings comprise approximately 50% of all dwellings, about 30% of which are American. With regard to seasonal attractions and events, 502 runners participated in the Wolfe Island Classic, for the Canada Day weekend, and along with their support groups brought a number of visitors to the Island in 2006. The Music Festival draws another 1,000 attendees on average from many origins during the second weekend of August, and has a good growth potential. Big Sandy Bay Conservation Area attracted close to 5,000 paid visitors during its 2006 operating season from Victoria Day to Labour Day, in addition to the year-round visitation from hikers. Due to the introduction of promotional campaigns in 2006, Sandy Bay Conversation Area increased its paid seasonal visitation by 39%, up from 3,560 visitors in 2005 and 3,000 visitors during its first year of operation in 2004.

Wolfe Island is just south of Kingston and is reached via ferry 19 times a day. There is an additional private ferry access to Cape Vincent, NY, and limited ferry service to Simcoe Island. Overall, Wolfe Island features many attractions that tourists to Frontenac CD tend to favour, such as: bird watching, cycling, fishing, and hunting; and receives 1,200-1,500 cottagers during the summer months. Based on the available statistics (attraction attendance records, ferry traffic, number of seasonal cottagers and overnight commercial accommodation demand), PKF has estimated that **Wolfe Island attracted an estimated 116,000 visitors in 2006, representing over 150,600 person trips via ferry to the Island.**

Comparable Jurisdictions with Wind Plant Operations

PKF Consulting gathered anecdotal research regarding the link between tourism and wind farm developments in comparable Canadian and American jurisdictions. Based on interviews with representatives of tourism marketing and development organizations in eight jurisdictions, in addition to a review of international literature, the research indicates that although there have been initial issues regarding the development, for the most part the effects to date have been positive, including:

- Enhanced reputation as a community in favour of green technology, in addition to enhanced awareness of alternative energy technologies by residents;
- New opportunities for guided and/or self – guided tours, or an additional attraction for existing tours;
- Retail opportunities from related souvenirs and materials;
- Opportunity to develop new interpretive signage materials, thereby enhancing existing tourism product and marketing materials;
- Promotion of cultural characteristics and inclusion of renewable energy issues in community and cultural events;

- Potential access to previously remote areas for outdoor recreation enthusiasts via access roads;
- Opportunity for increased meetings and events from technical groups, renewable energy professionals, and educational groups; and
- Increased overnight accommodation, retail, and food and beverage demand during the construction phase of the development and potential increase in visitation from special interest groups, education groups, and tourists.

While the potential effects include an increase in environmental noise levels and a visually altered landscape, no supporting evidence was found to indicate that an area's tourism industry declined due to the effects purported with wind plant operations. Moreover the resulting effects are very subjective resulting in a variety of opinions on the matter. However, based on the literature review, interviews with comparable Canadian and U.S. jurisdictions, the majority of tourism industry representatives **believe that the development of wind plants had either a neutral impact or positive effect on tourism.**

Implications for Tourism on Wolfe Island

Based on the experience of comparable wind plant operations in eight Canadian and U.S. jurisdictions, as well as input by local and regional tourism stakeholders and European experiences, the addition of the proposed wind plant on Wolfe Island may generate the following new tourism opportunities:

- Addition of an Interpretive Site/Attraction for Wolfe Island
- Expansion of Outdoor Educational Programs on Wolfe Island
- Further Opportunities for Agri-Tourism
- Marketing Brand Opportunity
- Regional Co-Operative Marketing and Development Opportunities

Summary Findings / Conclusion

In summary, based on the research findings to address MOE criterion 6.3 (i.e., *Will the project have the potential to have negative effects on recreation, cottaging or tourism?*), it is concluded that the proposed wind plant may have the potential to result in very limited or no negative effects (e.g., roads and ferry use) on recreation, cottaging, or tourism to Wolfe Island.

Based on the experience of eight comparable Canadian and U.S. jurisdictions operating wind plants, there are generally three phases, which the local tourism industry undergoes in the development of wind plants:

1. Minor Opposition and Resistance to the wind farm development proposal;
2. General Acceptance and Understanding of the wind farm development; and
3. For those communities, which capitalize on the potential for tourism opportunities related to the wind farm operation, an associated increase in visitation and tourism revenues.

Based upon the research, Wolfe Island attracts an estimated **107,000 visitors in 2006, representing over 150,600 person trips to the Island via ferry**, including:

- 1,500 seasonal cottagers (comprising 45,000 ferry trips);
- 7,700 overnight guests to 16 commercial cottage, hotel and bed & breakfast establishments;
- 1,355 pass through visitors enroute to US/Kingston ferry; and
- 96,500 day visitors

While there may be the potential for temporary inconvenience of visitors, cyclists, and cottagers on Island roads, as well as ferry congestion during the construction phase, from a tourism perspective no comparable cases were found that reported a decrease in visitor volumes to the area due to the addition of a wind plant, particularly in terms of hunting and bird watching activities. Rather, the research indicates that wind plants can present opportunities for interpretation and provide an additional attraction/tour opportunity for both visitors and cottagers, contributing to increased tourism in the local area, while posing neutral effects to recreation.

Furthermore, the majority of local tourism stakeholders interviewed on Wolfe Island and in Kingston felt that the wind plant would not have any negative effects on tourism once in the operation stage. Rather, they believed that the development would bolster the tourism industry, acting as a draw for additional visitors during both the construction and development stage.

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GLOSSARY OF TERMS

Tourism

According to the World Tourism Organization (WTO) – Recommendations on Tourism Statistics: “Tourism comprises the activities of persons travelling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes.”

Visitor

Visitors are persons who undertake tourism, as defined above. They are referred to as either tourists (those who stay overnight or longer in the place visited), or Same-Day Visitors (see definition below).

Person Visit or Person Trip

All persons visiting an area during their trips are registered as having made one person-visit in the area.

Domestic Trip

A domestic trip is defined by Statistics Canada as travel to a Canadian destination at least 80 km one-way from home for any reason, except:

- travel to and from work or school (i.e. commuting);
- one-way travel involving a change of residence;
- travel of operating crew members of buses, aeroplanes, boats, etc.;
- travel in an ambulance to a hospital or clinic; and
- those whose trips do not originate in Canada.

This also includes trips by Canadian residents whose destination is outside Canada, but who have an overnight stop in Ontario en route to their international destination.

Same-Day Visitor

“Visitors who do not spend the night in a collective or private accommodation in the place visited” (WTO).

In Ontario, same day visitors from within the province must have travelled at least 40 km one-way from home in order to reach their destination, which same day visitors from other parts of Canada must have travelled 80 km or more one-way from home.

Overnight Visitor

“Visitors who stay at least one night in a collective or private accommodation in the place visited” (WTO).

Ontario does not pose any restrictions on overnight travellers with respect to the minimum distance travelled to reach their destination.

Visitor Expenditure

Visitor expenditures include spending by all incoming visitors, and exclude those that have been allocated to the point of origin. The “Point of origin expenditures” are the amounts spent by Canadian travellers on transportation before going on a trip outside their provinces (or census divisions or travel regions) of residence, which are assumed to have taken place at the location of origin of the trip and not at the locations visited. For example, in the case of a same-day trip, the expenditures on vehicle rental, vehicle operation and intercity transportation; and in the case of an overnight trip, they are the expenditures on vehicle rental and intercity transportation.

For domestic visitors, expenditures are broken down in the following categories: vehicle rental, vehicle operation, local transportation, inter-city transportation, accommodation, food or beverage purchases at stores during the trips, food and beverage purchased at restaurants or bars, recreation and entertainment, clothing and other expenditures.

For international visitors, the expenditures are broken down into the following categories: transport in Canada (public, local and private transportation), accommodation, food and beverage, recreation and entertainment, retail and others, and international transport on Canadian carriers.

Ontario’s Tourism Regional Economic Impact Model (TREIM)

The Ontario Ministry of Tourism provides TREIM on their website to make it easier for organizations and individuals working in, or interested about tourism to determine the economic impact of visitors’ and businesses’ spending in this area on the local and provincial economies.

TREIM produces the following:

- Estimates of the Direct, Indirect and Induced impacts of tourism-related activities on Gross Domestic Product (GDP).
- Estimates of the Direct, Indirect and Induced impacts of tourism-related activities on Labour Income and Employment (Number of Jobs).
- Estimates of the Direct and Total impacts of tourism-related activities on Federal, Provincial and Municipal Tax Revenues.

TREIM is a versatile tool capable of providing detailed tourism-related economic impact analysis for various user-selected geographies. The user can currently chose from one of 49 Census Divisions in Ontario, 14 Census Metropolitan Areas / Census Agglomerations, 12 Travel Regions, or the entire province.

Average Daily Rate (ADR)

Statistical unit used to measure a hotel's pricing scale. Figure derived by dividing actual monthly or annual room revenue by the total number of occupied rooms for the same period.

1.0 INTRODUCTION

Canadian Hydro Developers, Inc ("Canadian Hydro"), through its wholly owned subsidiary Canadian Renewable Energy Corporation (CREC), is proposing to build, own, and operate a wind plant on Wolfe Island in the Township of Frontenac Islands, Ontario. As part of the approval process, Canadian Hydro (TSX: KHD) has commissioned Stantec Consulting Ltd. to undertake an Environmental Review Report under Ontario Regulation 116/01 of the *Environmental Assessment Act*. The *Environmental Assessment Act* provides for the protection, conservation, and wise management of Ontario's environment by establishing a responsible and accountable process for decision-making before a project is undertaken. In addition, Canadian Hydro has requested the services of PKF Consulting to assess the potential effects of the proposed wind plant on Wolfe Islands' tourism industry. Specifically, this report addresses the Ministry of the Environment's 2001 *Guide to Environmental Assessment Requirements for Electricity Projects*, Screening Criterion 6.3:

Will the project have the potential to have negative effects on recreation, cottaging or tourism?

1.1 Wolfe Island Wind Project

The proposed Wolfe Island Wind Project will consist of 86, 2.3 MW wind turbines on the western head of the Island. Figure 1-1 is a map indicating the project area. The wind plant is anticipated to generate 537,000 MW hours per year of renewable energy. Pending approvals, construction of the project is expected to begin in the Spring/Summer of 2007 and be completed by October 2008. In addition to the proposed 86 wind turbines, ancillary facilities will include:

- Access road(s) to each turbine site;
- Above/below ground electrical collector system, including construction of a submarine cable from Wolfe Island to Kingston;
- Pad – mounted transformers located at the base of each turbine;
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As noted, the project developer is Canadian Hydro. Currently, Canadian Hydro owns and operates 18 power generation facilities including wind, water, and biomass in the provinces of Ontario, Alberta, and British Columbia. Additional information on the Wolfe Island Wind Project is available on the project website: www.wolfeislandwind.com.

1.2 Study Scope and Objectives

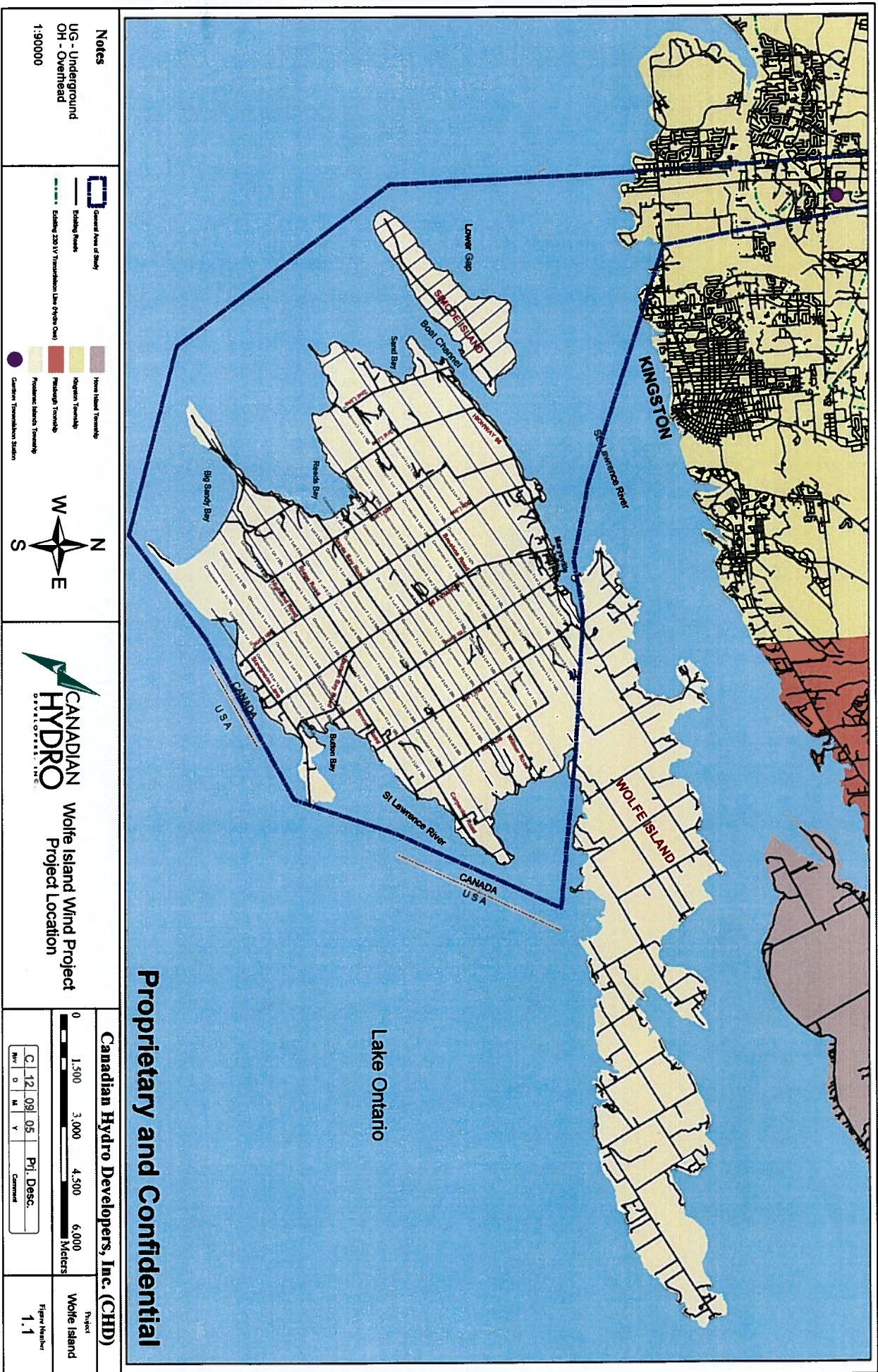
In undertaking this study, the scope of work encompassed the following aspects:

- Provide relevant baseline information and trends with discussion.
- A current situational analysis of the tourism industry in the County of Frontenac and on Wolfe Island;
- Consideration of the implications of the change in landscape the proposed wind plant may place on Wolfe Island; and
- A tourism analysis of comparable jurisdictions with operational wind plants.

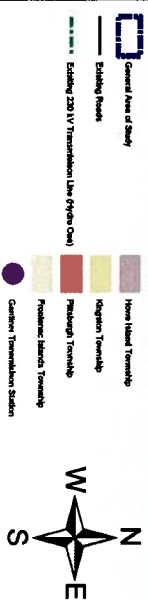
To accomplish the objectives of the assignment, PKF Consulting undertook a work program involving the following steps:

- A site tour of the wind plant project area on Wolfe Island as well as existing tourism operations;
- A review of background materials on wind plant operations, and the economy and tourism industry within the Kingston area;
- Personal and telephone interviews with key tourism stakeholders in the Kingston and Wolfe Island area;
- A review of historic visitation, spending, and economic impact of tourism in Frontenac County and an estimate of the volume and value of the tourism industry on Wolfe Island;
- A review of 2004 to 2006 monthly ferry count statistics to indicate baseline visitor and resident counts to the Island and seasonal tourist flows;
- Telephone interviews with representatives of the tourism industry and/or economic development organizations from eight jurisdictions in Canada and the United States which have operational wind plants in their area; and
- An assessment of potential socio-economic effects and development opportunities of the proposed wind plant on tourism on Wolfe Island.

EXHIBIT 1-1
MAP OF WOLFE ISLAND, ONTARIO



Notes
UG - Underground
OH - Overhead
1:90000



CANADIAN
HYDRO
Wolfe Island Wind Project
Project Location

Canadian Hydro Developers, Inc. (CHD)		Project
0 1,500 3,000 4,500 6,000 Meters		Wolfe Island
C 12 09 05	Pri. Desc.	Figure Number
Rev. 0	M. Y.	1.1
Comment		

2.0 WOLFE ISLAND'S TOURISM INDUSTRY and REGIONAL TRAVEL MARKET OVERVIEW

Given its proximity to the US border, as well as the major Canadian cities of Kingston, Ottawa, and Toronto, Wolfe Island is a good example of how national trends are playing out at a micro level. The following analysis provides a summary of Wolfe Island's tourism industry, followed by a market overview of Canada, including a wider profile of tourism activity in Frontenac County, and the City of Kingston. Historic visitor volumes and expenditures, as well as changes to accommodation supply and demand, have been evaluated in order to gain an overall perspective of the potential effects of a wind plant on tourism on Wolfe Island.

2.1 Wolfe Island's Tourism Industry

2.1.1 Wolfe Island - Market Overview

Wolfe Island is the largest of the 1,000 Islands, located at the eastern end of Lake Ontario and the beginning of the St. Lawrence River, directly opposite to the City of Kingston. The Island is about 29 km in length and ranges from a few hundred metres to 9 km in breadth; totalling over 30,000 acres in area (more than twice the size of Bermuda). Together with Simcoe Island and Howe Island, it forms the Township of the Frontenac Islands. Within this Township, the majority of business and tourist operations are located on Wolfe Island. Tourist businesses on Wolfe Island include: sixteen accommodations, one marina and two golf courses. Most of these are family owned and operated establishments with less than five staff members that operate seasonally from May to September.

The current population on Wolfe Island is about 1,200, yet it can reach up to 2,700 in the summer months with cottagers. The Island contains about 5% of Frontenac County's resident population year-round. The Village of Marysville is the largest community on the Island. The Island can be accessed by three different ferry services with access to 1) Kingston, 2) Cape Vincent, NY, and 3) Simcoe Island. The service from Cape Vincent requires passengers to traverse Wolfe Island if they are planning on travelling on to Kingston. Consequently, one of the current tourism promotions encourages visitors to "linger longer..." before they make the second leg of their journey.²

The tourist industry on Wolfe Island consists primarily of outdoor recreational activities, such as: sailing, bird watching, bicycling, fishing, and hunting. Specific attractions include: the three Ferry services, Big Sandy Bay, Ryan Centre Outdoor Education, corn maze, horse and sleigh rides, and a number of weekend events held throughout the summer months.³ Photos of various sites and attraction on Wolfe Island have been included at the end of this Section, and Appendix A provides details of each ferry service.

² *Wolfe Island Tourism brochure (retrieved in January 2007)*

³ *Socio-Economic Appendix – Environmental Assessment of Wolfe Island, Stantec Consulting, 2006*

2.1.2 Wolfe Island - Tourism Resources

The 3.2 km stretch of beach known as Big Sandy Bay (<http://www.bigsandybay.ca/>) has been designated a significant *Area of Natural and Scientific Interest* due to its natural sand dunes, wetlands, and migratory birds. Big Sandy Bay is now protected because Nature Conservancy of Canada, Ontario Region, worked in conjunction with Environment Canada's Canadian Wildlife Service, Ontario Ministry of Natural Resources, Ducks Unlimited Canada, and the U.S. Fish and Wildlife Service to purchase the 140-acre wetland for just over \$160,000 in 2004.⁴ The Township and the Friends of Big Sandy Bay help to maintain the area, and access has been controlled with the introduction of an entrance fee. Since the parks opening in 2004, paid visitor use of the area has increased yearly; 19% in 2005 and 39% in 2006, as demonstrated by Table 2.1.

TABLE 2-1 BIG SANDY BAY VISITOR NUMBERS 2004 - 2006		
YEAR	VISITOR NUMBERS	% CHANGE
2006	4,959	39%
2005	3,559	19%
2004	3,000	N/A

Source: The Township and Friends of Big Sandy Bay, 2006

Wolfe Island also offers two nine-hole golf courses: the Wolfe Island Riverfront Golf Course (www.wolfeisland.com/riverfront/) and Alston Moor Golf Links (<http://alstonmoor.wolfeisland.ca/>). Additionally, annual events include the Wolfe Island Classic (i.e., an annual 5km and 10km run), Chili Fest, Art in the Garden Tour, Crime Writers Festival, and Wolfe Island Music Fest.⁵

There are also three bicycle routes that span across the entire Island, one of which includes Big Sandy Bay. These routes all start at the Wolfe Island Tourist Information Centre in the Village of Marysville, and range from approximately 18 – 58 km in distance. A new map of the Island has been recently published featuring these routes and it is hoped that this will draw more tourism. However, there is some controversy surrounding the use of these routes. Although several Kingston-based cycling clubs favour the Island cycling routes, there is no campground open for overnight stays, as it was closed three years ago. Furthermore, the roads are quite narrow and there is a need for a dedicated cycling lane for safety reasons.

Wolfe Island has no public hunting areas, but hunting is permitted when landowner permission is obtained. Wild turkey, white tailed deer (bow hunting only), cottontails and jackrabbits are present on the Island, and hunting restrictions are in place according to seasons. Wolfe Island is famous for its variety of waterfowl and is a well-known venue for dog trials. All of the waterfowl hunting opportunities are either on leased land, by

⁴ <http://library.fws.gov/birdscapes/fall01/Ppcn.html> (Accessed January 12, 2007)

⁵ www.wolfeisland.com (Accessed December 20, 2006)

guided hunt, or with landowner permission, as they involve guns. Hunting Lodge Inns provide “pay as you hunt” programs, and are particularly popular with Americans. There are commercial hunting opportunities on Wolfe Island through guiding services and Licensed Ontario Game Farms.⁶

Wolfe Island is recognized as an Important Bird Area (“IBA”) of Canada, under Canada’s Important Bird Area Program and offers excellent opportunities for bird watching enthusiasts year-round. Groups of field naturalists often travel to the Island for the variety of: field birds, shore birds, birds on the water, songbirds, raptors, hawks, owls, herons, and many others. The portion of the Island west of Bayfield Bay is the most productive for land birds. Large numbers of waterfowl species congregate around Wolfe Island during spring migration.⁷ As new species continue to arrive, there is a growing concern amongst environmentalists and naturalists that more land will need to be dedicated to bird habitats.

2.1.3 Wolfe Island - Tourism Organizations

The Wolfe Island Business and Tourism Association (WIBTA) (<http://www.wolfeisland.com/>) is a not-for-profit organization whose mission is “to promote the development, improvement and broadening of business and tourism opportunities within the Wolfe Island Ward.” WIBTA performs marketing operations, organizes local festivals and events, and in all manners actively works towards stimulating tourism on the Island in addition to ensuring the island’s natural resources are conserved. Formal relationships with off-island organizations, such as the Greater Kingston Chamber of Commerce, and local community organizations are key to WIBTA’s mission. A membership committee maintains the outreach functions and database of WIBTA members, and promotes use of the website to local businesses.

The WIBTA developed a strategic plan in 2005, with the following objectives identified for tourism:

- To create a comprehensive marketing plan including the regional distribution of a brochure;
- To leverage participation through regional partnerships;
- To explore and establish working relationships with off-island organizations;
- To promote the Island to Islanders;
- To assess necessary improvements to existing Tourism Information Centre (TIC); and
- To continue existing fundraising activities and annual events

The Land O’ Lakes Tourist Association (LOLTA) (www.lol.on.ca) is Frontenac County’s Destination Marketing Organization (DMO) for the area encompassing the County of Frontenac, the County of Lennox and Addington and Tweed. A preliminary review of the LOLTA membership indicates that tourism businesses operating in North, Central and South Frontenac comprise more than 80 percent of the LOLTA membership, the remaining 20% operating on the islands. In turn, the majority of the Island businesses are located on Wolfe Island.

⁶ *Ibid.*

⁷ *Socio-Economic Appendix – Environmental Assessment of Wol2,708fe Island, Stantec Consulting, 2006*

Based on a 2005 survey by LOLTA, tourism operators identified the following barriers to initiating a tourism operation in the County:

- Seasonal nature of the tourism industry;
- Aging infrastructure, ownership;
- Cost of environmental protection measures (i.e., waste management, water standards and testing, energy efficiency and cost);
- Lack of available land for new development and the cost of acquisition and amendments (Official Plans and zoning by-laws); and
- Conflict among trail users (i.e. hiker versus ATV rider)⁸

2.1.4 Wolfe Island - Ferry Traffic

As mentioned, Wolfe Island can be accessed by three different ferry services with access to 1) Kingston, 2) Cape Vincent, NY, and 3) Simcoe Island. Table 2-2 provides a summary of the Wolfe Islander III vehicle and passenger counts by month from 2004 to 2006, while Table 2-4 provides a summary of the 2006 monthly ferry traffic between Wolfe Island and Simcoe Island. Unfortunately, no data was provided for the Cape Vincent Ferry service, which is a private-sector operation.

In 2006, 501,888 passengers and 202,909 vehicles travelled to Wolfe Island on the Wolfe Islander III. In 2005 and 2004, passenger counts were approximately 3% higher at an estimated 518,000. At the same time, over 488,247 passengers and 203,325 vehicles travelled to Kingston on the Wolfe Islander III in 2006, down 4.8% from the 517,769 passengers in 2005.

TABLE 2-2 WOLFE ISLANDER III FERRY COUNTS, BY MONTH 2004 - 2006									
	2004			2005			2006		
	Vehicles	Passengers	Out of Prov & Int'l Vehicles	Vehicles	Passengers	Out of Prov & Int'l Vehicles	Vehicles	Passengers	Out of Prov & Int'l Vehicles
TO WOLFE ISLAND									
Jan	12,941	27,757	101	13,282	29,056	99	13,736	29,480	127
Feb	12,384	27,068	92	13,185	28,376	78	12,943	28,558	100
Mar	13,960	30,984	126	14,374	32,723	131	14,933	32,444	153
Apr	15,305	34,015	385	15,499	36,992	396	15,534	37,261	366
May	17,281	43,180	1,035	18,025	42,814	971	17,887	46,346	941
Jun	18,378	49,222	1,383	19,132	49,929	1,735	19,212	46,397	1,144
Jul	20,931	66,812	2,358	21,284	58,656	2,263	21,133	60,690	2,240
Aug	20,982	66,070	2,722	21,673	64,304	2,865	21,223	66,919	2,383
Sep	17,531	53,063	1,646	17,673	47,360	1,416	17,364	43,944	1,132
Oct	18,937	46,935	938	17,333	44,027	787	16,959	40,495	779
Nov	13,878	39,306	366	15,921	49,949	233	15,992	34,534	377
Dec	13,204	33,734	217	14,813	33,583	156	15,993	34,280	251
ANNUAL	195,712	518,146	11,369	202,194	517,769	11,130	202,909	501,888	9,993

⁸ Report on the Economy, Proposed Goals, Objectives and Actions. County of Frontenac 2006

**TABLE 2-2
WOLFE ISLANDER III FERRY COUNTS, BY MONTH 2004 - 2006**

	2004			2005			2006		
	Vehicles	Passengers	Out of Prov & Int'l Vehicles	Vehicles	Passengers	Out of Prov & Int'l Vehicles	Vehicles	Passengers	Out of Prov & Int'l Vehicles
TO KINGSTON									
Jan	13,365	27,828	116	26,681	57,499	222	13,685	29,410	132
Feb	12,680	27,299	104	12,550	26,717	72	12,104	26,219	97
Mar	14,273	31,453	182	14,156	30,718	153	14,687	32,382	121
Apr	15,270	32,609	330	15,467	36,611	372	15,599	36,468	368
May	17,221	41,613	1,174	17,930	42,654	957	17,923	42,169	1,093
Jun	19,104	49,401	1,615	18,899	46,210	1,853	19,098	45,263	1,340
Jul	21,442	64,734	2,786	21,130	53,254	2,577	21,837	60,371	2,796
Aug	21,598	62,762	3,091	21,758	62,003	2,934	21,613	63,094	2,753
Sep	18,141	51,094	2,140	17,577	45,243	1,664	17,607	42,585	1,391
Oct	15,235	47,687	1,100	17,146	42,968	934	17,227	40,414	864
Nov	13,527	38,237	403	15,497	36,538	280	15,905	34,898	360
Dec	13,715	33,590	259	14,680	32,321	183	16,040	34,974	253
ANNUAL	195,571	508,307	13,300	213,417	512,736	12,201	203,325	488,247	11,568
<i>Source: Ministry of Transportation, Marine Services, Kingston, Ontario</i>									

Utilizing the Wolfe Islander III ferry traffic data provided by the Marine Services division of the Ministry of Transportation, PKF estimated the tourist traffic flows to and from Wolfe Island, based on the following assumptions:

- All non-resident traffic to Wolfe Island has been categorized as tourists, including all international and out of province ferry traffic to Wolfe Island, as well as the balance of Ontario vehicles net of Wolfe Island resident traffic;
- Based on monthly variations in the data, Wolfe Island residents account for an estimated 12,000 ferry trips per month to and from the Island;
- At an average of 2.5 persons per vehicle, Ontario tourists to Wolfe Island represented 25% of the domestic traffic to the Island in 2006, for a total of 122,290 tourists (an increase of 1.1% over 2005 levels);
- Similarly, at an average of 2.5 persons per vehicle, Ontario tourists travelling from Wolfe Island to Kingston represented 25% of the domestic traffic in 2006, for a total of 119,393 domestic tourists (down 14.5% from 2004 levels);
- At an average of 2.7 persons per vehicle, out-of-province and international vehicle counts represent a total of 26,981 tourists to Wolfe Island in 2006, down 10% from 30,051 tourists in 2005; and
- Similarly, at an average of 2.7 persons per vehicle, there were an estimated 31,234 tourists travelling from Wolfe Island to Kingston in 2006, down 5% from the 32,943 tourists in 2005.

TABLE 2-3 ESTIMATE OF NON-RESIDENT PERSON TRIPS TO AND FROM WOLFE ISLAND, 2004 to 2006					
Person Trips	2004	2005	% chg	2006	% chg
To WOLFE ISLAND					
Out of Province & International Tourists	30,696	30,051	-2.1%	26,981	-10.2%
Ontario Tourists	100,858	117,660	16.7%	122,290	3.9%
Total	131,554	147,711	12.3%	149,271	1.1%
To KINGSTON					
Out of Province & International Tourists	35,910	32,943	-8.3%	31,234	-5.2%
Ontario Tourists	95,678	143,175	49.6%	119,393	-16.6%
Total	131,588	176,118	33.8%	150,626	-14.5%
<i>Source: Ministry of Transportation, Marine Services, Kingston, Ontario and PKF Consulting</i>					

Based on our analysis, an estimated **149,271 person trips were taken to Wolfe Island via the Wolfe Islander III in 2006**, representing an increase of 1.1% over 2005 levels and 13.5% over 2004 levels. At the same time, an estimated **150,626 person trips were taken to Kingston via the Wolfe Islander III in 2006**, representing a decrease of 14.5% over the number of person trips in 2005, but an increase of 14.5% over 2004 levels. The higher number of person trips to Kingston via the Wolfe Islander III account for those visitors which pass-through Wolfe Island on one leg of their trip, either en-route to or from the United States, via the Cape Vincent ferry.

The Simcoe Island ferry generates less than 8% of the demand levels generated by the larger, more frequent Wolfe Islander III ferry service. At 40,300 passengers in 2006, Table 2-4 indicates that 40% of ferry traffic between Wolfe Island and Simcoe Island in 2006 occurred during the Summer months (June, July, August), with the month of August generating the highest volumes of passengers at about 6,900.

TABLE 2-4	
TOTAL PASSENGER NUMBERS	
SIMCOE ISLAND FERRY SERVICE - 2006	
Month	Total Passengers
January	1,311
February	1,474
March	1,171
April	3,467
May	3,713
June	3,785
July	5,371
August	6,933
September	4,132
October	3,142
November	3,093
December	2,708
TOTAL	40,300

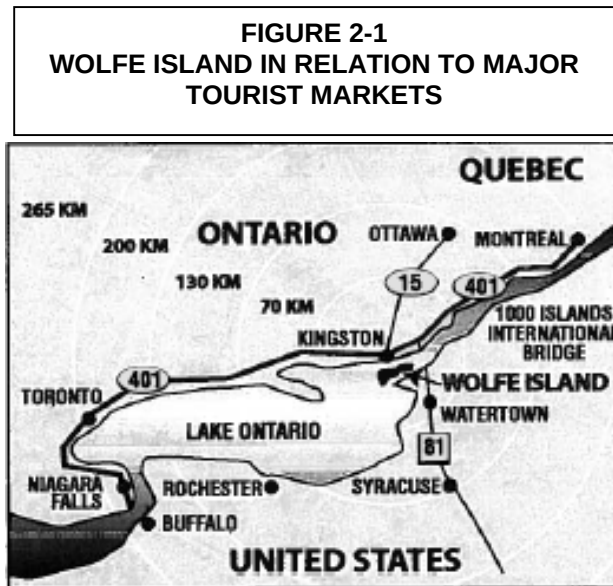
Source: Simcoe Island Ferry Service, 2006

2.1.5 Wolfe Island - Visitor Volumes

The Visitor Information Centre on Wolfe Island is open from Victoria Day weekend through to Thanksgiving each year, and their records indicate a total of about 10,000 enquiries to the Centre in 2006. These include day visitors from the US and Kingston. PKF has estimated 6,900 occupied room nights on Wolfe Island as of year-end 2006, which at a 2.25 double occupancy factor and average length of stay of two nights would yield approximately 7,700 overnight guests staying on Wolfe Island last year. This represents approximately 2% of total visits to the Frontenac Townships (refer to Section 2.5.3).

July and August bring in approximately 1,200 to 1,500 seasonal residents or “cottagers”, many of whom stay on Wolfe Island for the summer and also attend events in Kingston. Seasonal dwellings comprise approximately 50% of all dwellings, about 30% of which are American. With regard to seasonal attractions and events, 502 runners participated in the Wolfe Island Classic, for the Canada Day weekend, and along with their support groups brought a number of visitors to the Island in 2006. The Music Festival draws another 1,000 attendees on average from many origins during the second weekend of August, and has a good growth potential. Big Sandy Bay Conservation Area currently brings in three or four group tours during the off-season in addition to the year-round visitation from hikers and beach enthusiasts. Promotional campaigns in 2006 brought an increase in visitation of 30% to Big Sandy Bay, as well as a small profit.

As more schools and universities (e.g., Queen's University) are becoming aware of the area, tour numbers are expected to increase. Ryan Centre Outdoor Education, which is part of the Algonquin and Lakeshore Catholic District School Board and is used exclusively for its schools, already brings in about 2,000 students annually. Figure 2-1 provides a map of the Island and the range of markets from which it receives tourists.



Source: Wolfe Island Business & Tourism Association, 2005

In summary, based on the available statistics (attraction attendance records, ferry traffic, number of seasonal cottagers and overnight commercial accommodation demand), PKF has estimated that Wolfe Island attracted an estimated 107,000 visitors in 2006, representing over 150,600 person trips via ferry to the Island.

TABLE 2-5 ESTIMATE OF TOURIST VOLUMES TO WOLFE ISLAND, 2006			
Market Segmentation	Visitors	Person Trips	Assumptions on # Ferry Trips to Wolfe Island
Seasonal Cottagers	1,500	45,000	2.5 ferry trips per week over 3 months
Overnight Visitors	7,700	7,700	1 ferry trip per visitor
Pass Through Visitors	1,355	1,355	1 ferry trip per visitor
Day Visitors	96,571	96,571	1 ferry trip per visitor
TOTAL	107,126	150,626	
Source: PKF Consulting Analysis and Ministry of Transportation, Marine Services, Kingston, Ontario			

2.1.6 Wolfe Island - Accommodation Supply and Demand

Approximately 50% of the dwellings in the Frontenac Islands are seasonal.⁹ According to the County of Frontenac Census, there were 1,193 dwellings within the County in 2001, 590 of which were owned, 70 rented, and 533 seasonal properties that operate from Victoria Day weekend through to Thanksgiving. Total accommodation supply on the Island includes: bed & breakfasts, cottages, and a small hotel, for a combined

⁹ <http://www.frontenacounty.ca/> (Accessed December 20, 2006)

total of 16 properties and 58 guest rooms as identified in Table 2-6. Wolfe Island contains approximately 4% of total guest rooms in Frontenac CD (1,466 rooms), and 16% of properties within the four Frontenac Townships (101 properties). Several of the bed & breakfasts on the Island offer tourist packages (spa, hunting, fishing, etc.).

TABLE 2-6 ACCOMMODATION SUPPLY - WOLFE ISLAND - 2006	
Property Name	Rooms
Bayfield Bay B&B Inn	3
Browns Bay Inn	8
Button Bay B&B	2
Cedarcliff	1
Dreamcatcher's Inn	8
General Wolfe Hotel	9
Horne's Housekeeping Cottages	5
MacDonald's B&B	3
McCready's Cottages	5
Mosier's Cottage	2
Pike View	2
Sugar Woods - Vacation Rental	1
Taggart's Landing	2
Van Hal's B&B	2
The Willows	1
Wolfe Manor B&B	4
TOTAL (16 Properties):	58

Source: PKF Consulting

Table 2-7 further identifies a steady increase in rooms supply from 2002 through to 2006, including significant growth of 15.8% in 2004. With about 6,900 occupied room nights recorded as of year-end 2006, PKF has estimated that 7,700 overnight visitors stayed on Wolfe Island last year.

TABLE 2-7 WOLFE ISLAND - HISTORIC SEASONAL OCCUPANCY LEVELS					
	2002	2003	2004	2005	2006
Rooms	43	45	53	56	58
Seasonal Occupancy	60%	61%	62%	63%	63%

Source: PKF Consulting

2.2 National Travel Forecast

In order to set the context for tourism on Wolfe Island, we have also provided a National Travel Forecast and an overview of the regional tourism profile for the area including the County of Frontenac and City of Kingston.

According to Statistics Canada, domestic travellers were a source of growth in 2005, as Canadians increased their tourism spending by 9.4% over 2004, representing the largest gain since 2000. In 2005, international travel growth remained strong from the overseas segment; however, Canada continued to lose market share from overnight US travellers.

According to the International Travel Account, Americans spent 8.6% less in Canada in 2005, in comparison to 2004, during which time the value of the Canadian dollar increased 7.4% relative to the U.S. dollar. Several factors, including the rising Canadian dollar and gasoline prices, may combine to hinder the travel industry's ability to grow in the years ahead.

The weakening of the U.S. travel market is also a serious concern for the industry. Overnight travel by U.S. residents to Canada was down 5% in 2005, compared to 2004. Same day visits by U.S. residents travelling by automobile were down 39% in 2005 versus 2000. January 2006 year-to-date same day visits by U.S. residents were down 11% versus 2005 YTD. This will be worsened by the implementation of the U.S. Western Hemisphere Travel Initiative ("W.H.T.I."), which requires all U.S. citizens and visitors entering the U.S. to present passports by 2007 for air and sea travel, and mid 2008 for land-border crossings.

Recent studies have estimated that from 2005 to 2008, the number of U.S. arrivals in Canada will decline by 7.7 million and result in a \$1.6 billion revenue loss – the equivalent loss of the SARS epidemic. President Bush's April 2006 announcement confirming the need for a passport and the American government's unwillingness to extend the dates, have now focused the Canadian industry's efforts on implementation issues and clearing up some of the travel-dampening confusion that has resulted from erroneous media reports about the WHTI.

On an international basis, growth in the overseas market continues to be strong. Overall, the Conference Board of Canada continues to project overall travel growth of 3.5% in 2006. Table 2-8 summarizes the Conference Board of Canada's projections for overall travel growth for the 2004 to 2008 period.

**TABLE 2-8
NATIONAL OVERNIGHT TRAVEL FORECAST (% CHANGE)**

Segment	2004 actual	2005 (e)	2006 (f)	2007 (f)	2008 (f)
Domestic Origin	2.6%	4.1%	4.9%	2.9%	4.2%
United States Origin	6.3%	-5.3%	-4.8%	-2.4%	-5.3%
Overseas Origin	27.3%	5.3%	2.9%	4.8%	4.5%
Total Visitation	4.1%	2.8%	3.5%	2.3%	3.1%

Source: Conference Board of Canada Travel Markets Outlook, Autumn 2006
(e) Estimate (f) Forecast

2.3 Frontenac County

2.3.1 Frontenac County – Market Overview

The County of Frontenac is located in the heart of Eastern Ontario, approximately 250 km east of Toronto. The majority of the County is situated due north of the City of Kingston. Frontenac is one of the original nineteen counties in Upper Canada. As of 1998, the eighteen former townships were restructured to form four townships – the Townships of North, Central, and South Frontenac and the Frontenac Islands; which combined are known as “The Frontenacs”.¹⁰

According to Statistics Canada, the total population of Frontenac County in 2001 was recorded at 24,411 people, and was estimated at 25,636 as of 2006. Most of the population is concentrated in areas bordering the City of Kingston. About 67% of the population resides in the Township of South Frontenac, despite the Township having the smallest land area. This population is primarily made up of family residences and farms in the villages of: Sydenham, Verona, Harrowsmith, Battersea, Inverary, and Perth Road Village.

Central Frontenac originally marked the trading divide between Ottawa and the Golden Horseshoe, with exposure to the Canadian Shield, and holds about 19% of the County’s population. North Frontenac contains the largest land area, with 8% of the County’s residents, and its development is related to the rail line connected to the extraction of natural resources through logging and mining. The Township of Frontenac Islands, which is the only Township south of the City of Kingston, contains the two largest islands in the 1,000 Islands of the St. Lawrence River: Howe Island and Wolfe Island, and had 1,638 residents in 2001 or 7% of the overall County population.¹¹

Frontenac County offers access to both the 1,000 Islands/St. Lawrence Seaway Travel Region and the Land O’Lakes Tourist Region, which stretches from Napanee and the St. Lawrence River northward to the

¹⁰ <http://www.frontenacounty.ca/> (Accessed December 20, 2006)

¹¹ *Ibid.*

Madawaska Valley. As a tourist destination, the Frontenacs contain a great deal of unspoilt Ontario territory, and are best known for outdoor recreational activities and historic or cultural experiences.

Regional attractions for Frontenac County include:

- North Frontenac Park Lands – Crown Lands with trails connecting 184 campsites on 12 lakes located in Plevna;
- Big Sandy Bay Conservation Area – 404 hectare property with environmentally protected natural sand dunes and wetlands located on Wolfe Island;
- Bon Echo Park – seasonal park with 526 campsites at the southern tip of the Canadian Shield, just north of Napanee;
- Frontenac Provincial Park – a semi-wilderness park with hiking trails and canoe routes located just north of Kingston;
- Fort Henry – a 19th century British military fortress and a National Historic Site, managed by the St. Lawrence Parks Commission within the City of Kingston;
- Water and land-based tours of the Thousand Islands; and
- Ferry to Cape Vincent, NY – one of the few remaining private pedestrian/vehicle ferries between Canada and the US, linking Cape Vincent to Wolfe Island.

Major employers in the County include: Government of Canada – Penitentiaries, St. Lawrence College, Queens University and Invista. One of Frontenac County's primary assets has been its ability to provide businesses with strategic access to major markets in both Canada and the U.S.A. The weakening U.S. travel market is therefore a major concern for this area. However, the McGuinty government has recently invested in tourism marketing and re-branding initiatives for the Land O'Lakes Region, which includes Frontenac County. According to a representative of the Land O'Lakes Tourist Association, "... re-branding will encourage area residents and visitors from nearby communities to experience the natural beauty of the region with frequent day-trips, while reinforcing the reality that the Land O' Lakes tourist region is a great vacation destination."¹²

The provincial government is also investing in a Business Retention and Expansion Project, as of December 2006, to help Frontenac County build a stronger and more competitive rural community. This project represents the first investment attraction strategy for the County, involving surveys of 300 businesses representing the fundamental industries that form the economic base of the County¹³:

- Agriculture
- Wood and Natural Resource Products
- Tourism and Related Water-based Industries

¹² *Ibid.*

¹³ *Ibid.*

- Knowledge or Talent-based businesses (generally home-based).

2.3.2 Frontenac County – Visitor Volumes & Expenditures

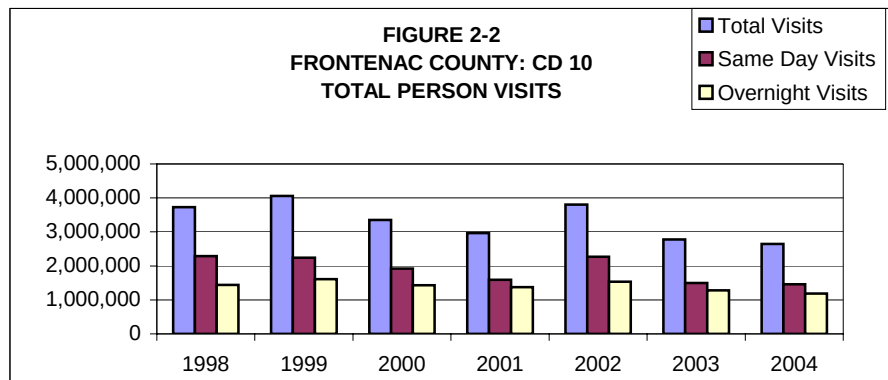
Table 2-9 demonstrates the history of overnight visits to Frontenac County, including the City of Kingston, from 2000 through 2004. According to the Ontario Ministry of Tourism, the City of Kingston is included within the Frontenac County Census District ("CD"): CD10. Ministry records from 2005 indicate that the main purpose for overnight trips to Frontenac CD was pleasure trips (53%), and that most travellers come from Ottawa and Toronto, with the average age set at about 38 years.

As shown in Table 2-9, about 80% of overnight visits to the area on average are from domestic markets (primarily Ottawa and Toronto), 15% from the US and 5% derive from overseas origins. Domestic business visits increased 70% in 2004 over 2003, while pleasure visits declined 34%, yet both Overseas and US overnight business and pleasure visits increased in 2004. Overall, overnight visits to Frontenac County have dropped 17% in the period from 2000 to 2004. With regard to same-day travel statistics from 2000-2004, visits have fallen 24%. The most significant change in travel history is that of same day US visits, which have fallen 30% during this 5-year period.

TABLE 2-9 FRONTENAC COUNTY: CENSUS DISTRICT 10 OVERNIGHT AND SAME DAY TRAVEL HISTORY (IN 1,000s)				
Segment	2001	2002	2003	2004
OVERNIGHT VISITATION				
Domestic Business	78,736	72,187	61,779	104,888
Domestic Pleasure	450,030	534,050	527,632	347,583
Domestic VFR and Other	564,275	626,260	457,049	478,390
TOTAL Domestic	1,093,041	1,232,497	1,046,460	930,861
US Business	15,912	11,196	4,444	6,155
US Pleasure	149,940	159,541	120,667	142,655
US VFR and Other	43,151	59,045	52,657	40,161
TOTAL US	209,003	229,782	177,768	188,971
Overseas Business	4,396	3,283	3,193	4,526
Overseas Pleasure	45,496	43,262	30,141	40,713
Overseas VFR and Other	22,661	29,199	25,224	18,502
TOTAL OVERSEAS	72,553	75,744	58,558	63,741
TOTAL OVERNIGHT VISITS	1,374,597	1,538,023	1,282,786	1,183,573
SAME-DAY VISITATION				
Domestic	1,411,359	2,050,460	1,278,873	1,277,747
US	142,879	184,875	201,784	159,240
Overseas	36,869	35,260	16,136	24,485
TOTAL SAME DAY VISITS	1,591,106	2,270,595	1,496,793	1,461,470
TOTAL PERSON-VISITS:	2,965,703	3,808,618	2,779,579	2,645,043

Source: Ontario Ministry of Tourism, Regional Tourism Profile – CD 10: Frontenac County, 2006

Figure 2-2 shows that over the past seven years total visits to Frontenac County have dropped by 29%, peaking in 1999, and reaching an overall low in 2003. The majority of visits have been same day, and these significantly decreased in 2001 and 2003. The lack of recovery signals may be due in part to the border crossing issues, as mentioned previously, along with the strong Canadian dollar and high fuel costs.



Source: Ontario Ministry of Tourism, Regional Tourism Profile – CD 10: Frontenac County, 2006

According to a study completed by *The Tourism Company* (2005), there were 482,600 tourist visits to the four Frontenac Townships alone in 2005. Table 2-10 shows that there was almost an equal amount of same day and overnight visits in 2005, although the majority (85%) were from domestic origins. US visits arrived predominantly via the Ferry from Cape Vincent, NY to Wolfe Island, ON.

TABLE 2-10 2005 FRONTENAC TOWNSHIPS TOTAL PERSON-VISITS (rounded)	
Origin	Total
Overnight	226,100
Same Day	256,500
Total	482,600
Domestic	409,500
US	59,700
Overseas	13,400
Total	482,600

Source: *The Tourism Company*, 2005

The Ministry of Tourism recorded total annual tourist expenditures in Frontenac County (i.e., CD10), including the City of Kingston, on all categories (including: lodging, food and beverage, transportation, entertainment, and retail) at approximately \$257 Million in 2004. The summer months attract 50% of the annual tourist visits, primarily comprised of friends and family to permanent or seasonal residents. The spring months generate 25% of annual visitors, with fishing being the main activity within these months. The fall accounts for 20% of annual visitors, whose main activities are based on hunting and fishing, as well as

tours of local artists in their resident studios. Winter makes up the remaining 5% of the annual visitors, although most operators cater to locals during these months.¹⁴

TABLE 2-11 TOTAL OVERNIGHT VISITOR SPENDING IN FRONTENAC COUNTY (CD10)- 2004 (in \$1,000's)	
Origin	Total
Canada	\$186,055
US	\$53,538
Overseas	\$17,346
Total	\$256,938

Source: Ontario Ministry of Tourism, 2006

The Tourism Company (2005) estimated that \$61 Million of total spending in the CD was spent directly in The Frontenacs. As with the entire CD, 50% of spending occurred in summer, 25% in spring, 20% in fall and 5% in the winter months.¹⁵

2.3.3 Frontenac County – Accommodation Supply and Demand

PKF Consulting maintains a database that tracks monthly occupancy and Average Daily Rate (“ADR”) information for a sample of 175,000 rooms across Canada. This database contains a sample of 1,466 rooms in Frontenac County, which represents about 80% of the rooms supply recorded by the Ontario Ministry of Tourism. Table 2-12 shows the year-end occupancies and ADR for the *Trends* database sample for the period from 2001 through 2005. Similarly to the rest of Canada, occupancy levels dropped slightly in 2003 with the SARS epidemic and showed little signs of recovery until 2005. Nevertheless, demand has remained relatively stable with rates climbing 5% in 2005 over 2004.

TABLE 2-12 FRONTENAC COUNTY - HISTORIC OCCUPANCY & ADR					
	2001	2002	2003	2004	2005
Occupancy (%)	61.5%	61.3%	59.4%	59.1%	62.0%
Average Daily Rate (\$)	\$96.64	\$100.25	\$104.93	\$106.52	\$111.99

Source: PKF Consulting

The *Frontenacs Report on the Economy* (2006) indicated that there were 101 commercial accommodation facilities in the four Frontenac Townships in 2005. This placed Frontenac County in 9th place within Eastern Ontario in terms of tourism resources. In total, Frontenac County has 189 built and/or managed tourism resources.

¹⁴ <http://www.frontenaccounty.ca/> (Accessed December 20, 2006); Land O' Lakes Tourism Association, 2005

¹⁵ *Report of the Economy – County of Frontenac, 2006*

2.4 Kingston

2.4.1 City of Kingston – Market Overview

Kingston Census Metropolitan Area (“CMA”) includes the Township of Frontenac Islands, the City of Kingston, South Frontenac Township, and extends east into Loyalist Township. Although the City is also part of Frontenac County Census District, it is not officially included in the County’s population base. Kingston alone has an estimated population of 122,752 as of July 2006, according to the *FP Markets – Canadian Demographics 2006*. Tourism is a vital source of business for the City, particularly given its location between Toronto and Ottawa, and its proximity to the State of New York across the St. Lawrence River.

Tourist activities throughout the Kingston market primarily consist of outdoor recreation and visitation to historic sites, such as Fort Henry. The City hosts several festivals during the year, including: the Limestone City Blues Festival, the Kingston Canadian Film Festival, Fanfayr Annual Juried Arts and Crafts Show, Kingston Busker's Rendezvous, Kingston Sheep Dog Trials, Kingston Jazz Festival, Kingston Dragon Boat Festival, Canada DanceSport, the Festival of Trees, and Feb Fest Winter Festival, with the Limestone Classic 4 on 4 Shinny Hockey Tournament.¹⁶

In operation since 1971, the Rideau Trail is a hiking trail that runs along the Rideau River from Kingston to Ottawa. The 200 km trail, which is maintained by the Rideau Trail Association, the 200 km trail is primarily utilized by both residents and visitors for hiking as well as snowshoeing and cross-country skiing.

The Lake Ontario Waterfront Trail spans 740 km, starting from Niagara-on-the-Lake and ending at Brockville, with links to both Kingston's waterfront and Wolfe Island. Kingston's location at the Rideau Canal entrance to Lake Ontario has made it the primary military and economic centre of Upper Canada, with several military sites preserved for tourist and educational purposes. In total, there are 20 National Historic Sites within Kingston, including the famous Fort Henry.

Lake Ontario Park was once an amusement park, but the rides were removed and transferred to Kingston Family Funworld. This waterfront park offers a beach for swimming, 250 seasonal campsites (including both electrical and tent sites), fishing, hot showers closed, a picnic area, and beach volleyball, among other amenities. North of this Park is the Cataraqui Golf and Country Club. The Cataraqui Creek Conservation area north of the 401, which is a 394-hectare site with marsh, field, and forest habitats. Winter is the most popular season at this Conservation Area, with Kingston's largest natural skating rink and 13 km of cross-country ski and snowshoe trails.¹⁷

¹⁶ Kingston Economic Development Corporation, 2001

¹⁷ Ibid.

Development is currently underway on the \$35 Million Kingston Regional Sports and Entertainment Centre. The new facility is located in downtown Kingston, adjacent to the Wolfe Island ferry dock, and is expected to open by January 2008. The complex will provide a 6,500-seat auditorium for use primarily by the Ontario Hockey League team, the Kingston Frontenacs, as well as local and regional trade shows, consumer shows, and concerts. Also nearing the final stages is the redevelopment of the Market Square and Grand Theatre. In this way, the City hopes “to expand its role as a regional centre for culture, tourism and recreation.”¹⁸

2.4.2 City of Kingston – Visitor Volumes and Expenditures

According to the Cities Project, which derives the percentage of County visits and value from Statistics Canada's national and international travel survey results, Kingston attracted approximately 2.1 million same-day and overnight person-visits during 2004. Overnight visits include: Pleasure, VFR (Visiting Friends and Relatives), Business and Business Convention visitors who travelled over 80 km, and make up 53% of total visitation.

Table 2-13 shows that the majority of overnight visitors were from other parts of Canada, 65% of whom derived from other parts of Ontario. Of the 188,000 US visitors, 78,000 (i.e., 41% of US visits) derived from New York. The largest source of Overseas visitation (22%) was the United Kingdom in 2004. The estimated percentage of same-day visits is 48% of total visitation, according to the Cities Project completed in 2004.

TABLE 2-13	
SAME-DAY AND OVERNIGHT PERSON-VISITS TO KINGSTON – 2004 (in 1,000s)	
Origin	# of Visits
Domestic Overnight	885
US Overnight	188
Overseas Overnight	64
Total Overnight:	1,136
Total Same-Day (Est.):	997
TOTAL (Est.):	2,133

**NOTE: Estimated figure using percentage of Same-Day Visits to Kingston in 2004*

Source: Cities Project, CTRI 2004; Research Resolutions, 2004

According to Tourism Kingston, US visitation has been declining significantly over the 2005 and 2006 period. Border crossings fell 8-10% over the past year. On a more positive note, domestic visitation has shown a slight increase of about 3%. Kingston's Destination Marketing Fund is being used for the third year running for an extensive advertising campaign. Approximately \$1 Million was spent in 2006 for a campaign

¹⁸ *Report on the Economy - Frontenac County, April 2006*

focuses on the Greater Toronto Area and Ottawa, with an additional \$400,000 dedicated to increasing tourism in 2007.

Expenditures made through non-resident trips to Kingston totalled about \$252 Million in 2004, 72% of which was derived from other Canadians. Of the total Domestic tourism revenue for 2004, approximately \$97 Million (54%) was derived from non-resident Canadians during the peak season (i.e., 01 July -31 September), due to the prominence of fair weather tourism infrastructure and traditional vacation patterns, including cottaging. Furthermore, 70% of domestic visitation came from rubber tire traffic, including both automobile and bus. Table 2-14 shows the total overnight expenditures in Kingston for 2004.

TABLE 2-14 TOTAL OVERNIGHT EXPENDITURES: KINGSTON - 2004 (\$1,000's)	
Origin	Total
Domestic	\$180,880
US	\$53,828
Overseas	\$16,969
Total	\$251,677

Source: Cities Project, CTRI 2004

Table 2-15 indicates the primary activities that tourists participated in while travelling to Kingston in 2004. The most popular activities among visitors to Kingston include shopping, sightseeing, and participating in outdoor activities, including: hunting, bird watching, and fishing. Activities such as visiting historic sites, festivals and fairs, or attending cultural events are also very popular for visitors from all origins. Canadians spend the most money annually on outdoor sports and other activities, although most overall person-visits arrive for shopping. American visitors spent more money on fishing than tourists from other origins after sightseeing and shopping, while overseas visitors favoured parks and historic sites.

TABLE 2-15 TOTAL EXPENDITURES and PERSON-VISITS BY ACTIVITY: KINGSTON - 2004 (\$1,000's)				
Activity	Canadian Visitors	American Visitors	Overseas Visitors	TOTAL VISITS (1,000s)
Shopping	\$ 107,556	\$ 38,514	\$ 13,624	568
Participate in Sports/Outdoor Activity	\$ 118,067	\$ 32,864	\$ 5,942	430
Sightseeing	\$ 81,109	\$ 27,400	\$ 12,779	412
Attend Cultural Performance/Event	\$ 47,492	\$ 8,170	\$ 5,314	206
Visit an Historic Site	\$ 23,091	\$ 17,079	\$ 7,362	177
Visit a National/Provincial Park	\$ 12,658	\$ 9,987	\$ 9,119	175
Fishing	\$ 6,677	\$ 18,355	\$ 2,989	133
Attend a Festival/Fair	\$ 6,386	\$ 9,060	\$ 3,056	91
Golfing	\$ 3,311	\$ 1,891	\$ 614	30
Hunting	\$ 4,910	\$ 4,103	-	26
Took a Cruise or Boat Trip	\$ 49,245	-	-	-
Walking or Hiking	\$ 23,271	-	-	-
Swimming	\$ 14,842	-	-	-
Boating	\$ 9,797	\$ 17,905	\$ 2,627	-
Visit a Museum or Art Gallery	\$ 7,418	\$ 11,110	\$ 6,550	-
Bird or Wildlife Viewing	\$ 5,622	-	-	-
Cycling	\$ 4,942	-	-	-
Other Water-Based Activities	\$ 3,287	-	-	-
Visit a Zoo, Aquarium, Botanical Garden	\$ 923	\$ 4,107	\$ 5,338	-

Source: Cities Project, CTRI 2004

2.4.3 City of Kingston – Accommodation Supply and Demand

The total competitive market in the City of Kingston consists of 1,382 guest rooms, and has not changed since 2001. Due to its position as the primary urban centre in Frontenac County, occupancy levels and daily rates are higher in Kingston than the County as a whole. Figure 2-3 details the historic market performance of Kingston from 2001 through to 2005, with year-to-date figures as of October 2006.

Table 2-16 also shows that demand fell following the SARS epidemic of 2003, but rates have continued to increase. As shown, occupancy levels increased 4.8% and rates increased 2.6% in 2005 over 2004. By year-end 2005, occupancies began to approach 2001 levels at 62.5%. Average daily rates are up 2.6% as of October 2006, at \$117.32, with year-to-date occupancy levels estimated at 65.3%, these numbers are very similar to the whole of Frontenac County, as demonstrated by Table 2-12.

FIGURE 2-3
Kingston, Ontario
HISTORIC ACCOMMODATION MARKET PERFORMANCE

						Year to Date	Jan - Oct
						2005	2006
Total Competitive Market	2001	2002	2003	2004	2005		
Rooms	1,382	1,382	1,382	1,382	1,382	1,382	1,382
Annual Occupancy	63.3%	61.6%	59.1%	59.6%	62.5%	64.6%	65.3%
Average Daily Rate	\$99.55	\$105.42	\$106.94	\$109.07	\$112.01	\$114.33	\$117.32
RevPar	\$62.99	\$64.97	\$63.15	\$65.03	\$70.00	\$73.88	\$76.59
Available Room Nights	504,430	504,430	504,430	504,430	504,430	418,746	418,746
Occupied Room Nights	319,199	310,845	297,883	300,753	315,233	270,584	273,353
Rooms Revenue	\$31,775,387	\$32,770,534	\$31,855,500	\$32,802,839	\$35,307,962	\$30,936,566	\$32,070,941
Market Growth	2001	2002	2003	2004	2005	2005	2006
Available Rooms	na	0.0%	0.0%	0.0%	0.0%	na	0.0%
Occupied Room Nights	na	-2.6%	-4.2%	1.0%	4.8%	na	1.0%
Average Daily Rate	na	5.9%	1.4%	2.0%	2.7%	na	2.6%

Source: PKF Consulting

26-Jan-07

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TABLE 2-16 CITY OF KINGSTON - HISTORIC OCCUPANCY & ADR					
	2001	2002	2003	2004	2005
Occupancy (%)	63.3%	61.6%	59.1%	59.6%	62.5%
Average Daily Rate (\$)	\$99.55	\$105.42	\$106.94	\$109.07	\$112.01

Source: PKF Consulting

In terms of future supply, a 72-room Residence Inn by Marriott is proposed for Ontario Street in downtown Kingston, along with an 80-room Holiday Inn Express at Highway 401 and Division Street.

2.5 Summary

Wolfe Island is just south of Kingston and is reached via ferry 19 times a day. There is an additional private ferry access to Cape Vincent, NY, and limited ferry service to Simcoe Island. Overall, Wolfe Island features many attractions that tourists to Frontenac CD tend to favour, such as: bird watching, cycling, fishing, and hunting; and receives 1,200-1,500 cottagers during the summer months. Based on the available statistics (attraction attendance records, ferry traffic, number of seasonal cottagers and overnight commercial accommodation demand), PKF has estimated that **Wolfe Island attracted an estimated 107,000 visitors in 2006, representing over 150,600 person trips via ferry to the Island.**

Major tourist attractions that are currently bringing in visitors include: Big Sandy Bay Conservation Area, the Wolfe Island Classic, the Wolfe Island Music Fest, and three major cycling routes. Although the majority of attractions and accommodations are seasonal, accommodation supply and demand have continued to increase for a current supply of 58 rooms (primarily seasonal) and peak season occupancies are estimated at over 63% in 2006. Hence, despite the national trends towards declining US visitation, Wolfe Island is already a stop-over for Americans and visitation levels have remained relatively steady over the past five years. The Island already has the potential to keep tourists “lingering longer” with its natural beauty and outdoor activities, and the potential featuring of the Island's proposed wind farm operation as a natural energy source could be a good complement to its existing attributes.

Wolfe Island is part of the Township of Frontenac Islands, which is one of four Townships that make up the County of Frontenac. This County contains about 25,650 people, 5% of whom reside on Wolfe Island. As a tourist destination, The Frontenacs offer visitors a great deal of history and outdoor recreational activities, and are located in close proximity to the urban centre of Kingston. The Ontario Ministry of Tourism considers Kingston as part of the Frontenac Census District, which received over 2.6 Million visitors in 2004 and \$257 Million in tourist expenditures.

The City of Kingston offers many tourist attractions for regional visitors to Frontenac County, as well as a thriving urban economy. The Kingston Regional Sports and Entertainment Centre (LVEC), due to open in January 2008, has the potential to bring in a wealth of cultural and recreational events, including trade and consumer shows. Visits to Kingston were recorded at 2.1 Million in 2004, 53% of which were overnight visitors. Despite the decline in border crossings from the US over the past two years, the City's Destination Marketing Fund (DMF) has been integral to attracting more domestic visits, particularly from the Greater Toronto Area and Ottawa. In 2004, visitor expenditures to the City of Kingston reached about \$252 Million.

FIGURE 2-4
WOLFE ISLAND
SITE PHOTOS



Tourist Information Centre, Marysville, Wolfe Island – Seasonal Operation



Wolfe Island Municipal Office, Marysville, Wolfe Island

FIGURE 2-4 (con't)



Trail Entrance to Big Sandy Bay Management Area



Washroom Facilities and Parking Lot at trail entrance to Big Sandy Bay Management Area

FIGURE 2-4 (Con't)



Horne's Private Ferry – Wolfe Island to Cape Vincent, NY – Seasonal Operaton



Cable Ferry – Wolfe Island to Simcoe Island

FIGURE 2-4 (Con't)



Seasonal Cottages, Wolfe Island



Wolfe Island Manor B&B Operation, Marysville

FIGURE 2-4 (Con't)



View of Kingston from Marysville, Wolfe Island



View of Farmland on Wolfe Island with Potential Wind Turbine sites



Farmland Views, Wolfe Island

3.0 COMPARABLE WIND FARM OPERATIONS and the TOURISM INDUSTRY

The relationship between wind plants and tourism and recreation has been documented internationally, prominently research coming out of the UK and Denmark. This section of the report provides a brief overview of the related research at an international level; presents findings from similar developments in comparable Canadian and U.S. jurisdictions; and provides a summary of the possible effects of wind plants on a region's tourism, recreation, heritage, and culture. The reader will observe that although comparable jurisdictions have been analysed, there are no examples of tourism and wind farm developments on islands of a comparable size to Wolfe Island, the research being qualitative in nature, rather than quantitative.

3.1 Related International Research

As previously noted, the majority of research regarding the effects of wind plants on tourism and recreation originates from Europe. Notable is a report prepared for VisitScotland by the Edinburgh-based firm, *NFO System Three* (2002). Based on consultations key players in the tourism trade, *NFO System Three* research concluded that the **development of wind plants in Scotland were considered to enhance the region's reputation of being an environmentally friendly place to visit**, in addition to being **regarded by some as a tourism attraction in their own right**. Based a survey of 180 visitors, the majority of visitors added that their responses were contingent upon the actual location of a wind plant.¹⁹ In terms of negative attributes, the primary concern of those surveyed was the visual change on the region's natural setting in addition to possible noise effects from the wind turbines.

A 2004 report, by the University of West England, surveyed tourists in Devon, a popular coastal destination in England, which features five Areas of Outstanding Natural Beauty. Approximately 94% of the 379 tourists surveyed, **stated that they would not be discouraged from visiting an area if there was a wind plant located there.**

Similarly, Friends of the Lake District surveyed tourists and tourism organizations in several boundary regions of England's Lake District in 2003. **Approximately 87% of tourists and 88% of tourism organizations reported that the existing and proposed wind plants in the area were a positive addition to the local tourism industry.**²⁰ A study in Wales regarding the effects of wind plants on tourism in the region found that approximately 70% of visitors would visit a wind plant in the area if an information centre were built.²¹ **Tourism and the wind energy industry co-exist happily in Denmark.** On the Danish west coast one of the popular tourist attractions is the Vestas wind turbine factory with its two adjacent wind

¹⁹ Prepared by NFO System Three for VisitScotland Investigation into the Potential Impact of Wind Farms on Tourism in Scotland. (2002) <http://www.viewsofscotland.org/>

²⁰ Star Consultants An Investigation into the Attitudes of Visitors, Tourists and Tourism Organizations toward Wind Farms on the Boundaries of the Lake District National Park. (2003)

²¹ Wales Tourist Board Impacts into the Potential Impact of Wind Farms on Tourism in Wales (2003)

farms. There has been enough interest that the local village established a museum for modern wind energy.²²

Lastly, a report by Scottish Renewables (2004), based on findings by the independent research company Ipsos Mori, provided the following statement regarding tourism in Argyll, Scotland:

Tourists visit Argyll because of the landscapes and its beautiful views and scenery. The research reveals that the wind farms are not seen as having a detrimental effect on their visit and would not deter tourists from visiting. Increasingly, the presence of wind farms would encourage more people to revisit than to stay away.²³

There is, however, opposition to the development of some wind plants in Europe. For example, Groups such as *Views of Scotland* believe that the Scottish Executive's policy of increased wind plants in rural Scotland is flawed. This group cites the inability to adequately measure the ability of wind power to reduce emissions in addition to concerns of possible blackouts resulting from too strong a reliance on wind energy. The group is also concerned about the degradation of the Scottish landscape by what they believe to be the poorly controlled development of wind plants in rural Scotland spurred by the possibility of short-term economic gain.²⁴

3.2 Analysis of Comparable Canadian and U.S. Jurisdictions

The establishment of wind plants as an alternative energy source is a relatively new development in Canada and the United States. For the purposes of this report, PKF has conducted interviews with representatives of tourism and/or economic associations from eight comparable wind plants in Canada and the United States in order to establish a baseline for opinions towards wind plants by key players in the tourism industry. A list of these jurisdictions and their contacts is available in Appendix B.

3.2.1 North Cape Wind Farm, Tignish, PEI

Located near the Town of Tignish, Prince Edward Island ("PEI"), the North Cape Wind Farm was developed by the Prince Edward Island Energy Corporation and consists of 16 wind turbines producing a total capacity of 10.56 megawatts. The commercial wind plant became operational in 2001 and was built on the same site as the Atlantic Wind Energy Test Site, established in 1980, which has been the site of wind energy research and development for more than 20 years.

²² Krohn, S. *Danish Turbine Manufacturers Association* (1999)

²³ *Scottish Renewables and the British Wind Energy Association Tourist Attitudes Toward Wind Farms* (2004)
http://www.bwea.com/pdf/mori_briefing.pdf

²⁴ *Views of Scotland* www.viewsofscotland.org

There is no cottaging in the area, however, North Cape provides hikers access to the Black March trail, and is also the location of rare natural rock reef formations, both of which are established visitor attractions. Based on discussions with the Western PEI Tourism Association, **there was no community resistance through the planning or development stages of the wind plant. In fact, the community embraced the development as supporters of wind energy.**²⁵

In the mid 1980's, an Interpretive Centre was built at North Cape that provided information on the region's ecology and folklore in addition to hosting a small exhibit on the test site for the wind plant. Following the opening of the North Cape wind plant in 2001, **a notable increase in visitation to North Cape prompted the redevelopment and expansion on the Interpretive Centre to include an extensive exhibit on wind energy, a gift shop and restaurant, and tours of the wind plant. The expansion resulted in approximately 60,000 visitors to North Cape annually, approximately 15% of which visit the Interpretation Centre.**²⁶ **The Centre employs 20 workers from May to October, bringing in approximately \$260,000 in gross annual sales from the restaurant and gift shop.**²⁷

Additional developments that have occurred as a result on the wind plant include the Wind Energy Institute of Canada, which opened in October 2006. The 7,806 square foot building is designed with laboratories and workshops and focuses on testing, certification, research and development, and education. The Institute is an independent non-profit organization whose partners include universities, colleges, other research institutions, and private sector companies. The Institute is funded by government sources and private donations, in addition to a percentage of the profits from the North Cape commercial wind plant.

3.2.2 Pincher Creek, Alberta

The Town of Pincher Creek, in Southern Alberta, has five major wind plant operations in the immediate area. The largest operation is the Summerview Wind Farm, which consists of 38 wind turbines that produce 68.4 MW -- enough energy to power approximately 20,000 homes. Direct benefits experienced by the Town during the development of Summerview included 18 full time equivalent jobs during planning and construction, and seven annual jobs for maintenance and operation. Local investment for the development and construction stage totalled over \$3.5 Million, with a further \$4 Million in annual operating costs. These benefits increase notably when the other four wind plants are considered.

The Pincher Creek area is largely agricultural with outdoor recreation activities including kite flying, hiking, golf, trail rides, and ranching. Although the Summerview site shares an access road with Head-Smashed-In Buffalo Jump, a UNESCO World Heritage Site, the wind plant is not within the sightline of the attraction.

²⁵ Anne Arsenault, Western PEI Tourism Association, Personal Communication 01/02/07

²⁶ Anne Arsenault, Western PEI Tourism Association, Personal Communication 01/02/07

²⁷ Canadian Wind Energy Association, North Cape Wind Farm www.canwea.ca

The first wind plant that was developed in the region, which is the oldest plant in Canada, experienced some community resistance during the planning stages, with common concerns being:

- Noise
- Aesthetics
- Shadow and flicker effect created by turbine blades
- Above ground power lines
- Night light effect caused by necessary aeronautic lights on turbines.

In order to mitigate these concerns, the Municipal District of Pincher Creek required all subsequent developments to include increased setback distances from anthropogenic features, underground power lines, reclamation of all service roads, and the provision of a decommissioning phase in the development plan.²⁸

Although there is little measurement of visitor motivations to the region, based on interviews with the Municipal Development Officer and a representative from the Pincher Creek Chamber of Commerce, the interest in the wind plants by visitors has been high. In addition to the various wind energy literature available at the Pincher Creek Tourism Information Centre, Vision Quest Windelectric recent to produced a free self-guided audio tour in the summer of 2006 and Kelly Ridge Development provides tours for groups of 25 or more. A further spin-off of wind energy is the successful branding of the region as *Naturally Powerful Pincher Creek*, with the sale of souvenirs branded with the new logo totalling approximately \$5,000 annually.²⁹

3.2.3 Melancthon Wind Plant, Melancthon, Dufferin County, Ontario

Phase I of the Melancthon Wind Plant began commercial operation in March 2006. With 45 turbines, this plant is a 67.5 megawatt project, capable of producing energy for approximately 20,000 homes.³⁰ The development is located in the agricultural Township of Melancthon, approximately 5 km west from the Town of Shelburne, Ontario.

Interviews with representatives of the Hills of Headwater Tourism Association and the Town of Shelburne's Economic Development Officer indicated that **there was initially minor community resistance** to the development from the residents of Melancthon and Amaranth Townships, however, none from Shelburne, which holds the plant in its sightline. **The Town of Shelburne views the development as a positive step for their tourism industry.**

²⁸ Wendy Kalkan, Municipal District Development Officer Pincher Creek, Personal Communication 01/02/07

²⁹ Canadian Wind Energy Association; *Why Wind is Right – Right Now*. www.canwea.ca

³⁰ Ontario Power Authority, *Melancthon Phase I*. www.powerauthority.on.ca

The Town is active in green initiatives and is home to a Youth Group called *Reduce The Juice*, whose goal is to reduce the area's energy consumption. In addition, the Town's Economic Development Office is proposing the construction of an Interactive Health Sciences Centre, in which the local renewable energy source would play a role. Additionally, Shelburne has recently included aerial photos of the wind plant in its marketing materials. The **Shelburne Economic Development Office also noted that there has been a steady increase in visitors to the area, which have expressed an interest in visiting the Melancthon Wind Plant** as well as adding to the residents' awareness of green technologies.³¹

3.2.4 Kingsbridge Wind Plant, Goderich, Huron County, Ontario

The Kingsbridge Wind Plant is located just north of Goderich in Huron County, Ontario in the former Township of Ashfield. The first phase of the project is operational with 22 wind turbines with a capacity for 39.6 MW. The turbines are located along the shoreline and are visible from the majority of vantage points. The area surrounding the site can be described as cottage country with numerous lakeside recreational and tourism opportunities and events offered to seasonal cottagers and visitors.

Based upon discussions with a representative from Tourism Goderich, **there was initially some minor resistance by area residents to the development;** however, the low level of concern did not warrant mitigation efforts. Since the development opened, the level of visitors inquiring into the wind plant has been steadily increasing, however, **Tourism Goderich representatives do not feel that the plant has resulted in an overall increase in visitors to the area.** In order to meet the demands for information, Tourism Goderich and the developer, EPCOR Power, are in talks to provide some level of interpretive services on the plant.

3.2.5 Huron Wind Farm, Kincardine, Bruce County, Ontario

The Municipality of Kincardine, located along the south shore of Lake Huron has been the site of six wind turbines since 2002. A proposal by Enbridge Inc. seeks to build 200 megawatts of wind power in the northernmost part of the municipality. The Enbridge project has been met with some community resistance. Approximately 20 of the proposed 121 turbines were to be located in the area around Port Elgin, however, this part of the project appears to have been cancelled due to an inability of the developer and municipality to agree on minimum setback distances. The remainder of the project has been clearing regulatory requirements since the announcement of an Environmental Screening in 2006.

The proposed site is primarily agricultural with little recreation or tourism in the immediate area. There has been community resistance to the project due to concerns by resident landowners. These concerns include noise, the impacts of a flicker effect caused by turbines interfering with the sunlight, in addition to fears that the wind turbines will devalue land in the area. A representative from the Municipality of Kincardine stated

³¹ John Tefler, Shelburne County Economic Development Officer 01/02/07

that only the impacted landowners have raised concerns, with no opposition stemming from the tourism stakeholders in the area.

Ontario's first privately owned nuclear energy site is situated on Lake Huron, between Kincardine and Port Elgin. Bruce Power, a consortium of companies, owns and operates both the nuclear facilities in addition to 50% of the existing six wind turbines. The Bruce Visitors Centre is located adjacent to the wind turbines and provides information regarding both nuclear and wind energy. There was an increase in visitor numbers immediately following the installation of the wind turbines. According to their records, the Bruce Power Visitors Centre reported a 79% increase in visitation levels over a three-year period, from 3,300 visitors in 2001 to 5,900 in 2004, with visitation levels stabilizing in 2005 and 2006 at about 6,050 people.

3.2.6 Erie Shores, Norfolk County, Ontario

Located along the shores of Lake Erie between Port Rowan and Port Burwell, Ontario, the Erie Shores wind plant is one of the largest of its kind in Canada. The approximately 100 MW facility is owned and operated by AIM PowerGen Corporation and spans Lake Erie's shoreline from Port Rowan to Port Burwell. The area surrounding the site is largely agricultural with little cottaging. Port Rowan is home to Long Point World Biosphere Reserve as well as Bird Studies Canada, and as such, is considered an ecological sensitive region. According to a representative from Norfolk County's Tourism and Economic Development office, there was little resistance to the wind plant development aside from initial concerns regarding the area's bird habitat. AIM commissioned an ornithologist to study any possible adverse effects of the proposed wind plant on avian nesting locations in the area and concluded that there were no adverse effects on the local populations. Officials in the birding community did not oppose these findings. The agricultural community was in favour of the development, which officially opened in April 2006.

Norfolk County's Tourism and Economic Development representative noted that the wind plant has generated interest by visitors to the area. Due to the wind plant's location near a highway and the large increase in visitor traffic levels, road officials in the area expressed concern over the safety of drivers. Although there are no recorded numbers to substantiate this, Norfolk's representative also stated that there was a **strong increase in visitor numbers and related expenditures in the Port Rowan area, which the community largely attributes to the new wind plant.** Requests for information at the Norfolk County Tourism and Economic development office increased such that an internal document was circulated that provided details regarding the wind plant itself, in addition to other attractions and accommodations located in close proximity to the development. The wind plant is now identified on a promotional map distributed by the office (refer to Figure 3-1) and the Tourism and Economic Development Office is currently in discussions with the wind farm developers to produce a self-guided tour of the area and its turbines.

FIGURE 3-1
ERIES SHORES WIND PLANT: TOURISM PROMOTION



3.2.7 Murdochville, Gaspé Region, Quebec

The Town of Murdochville is a small community located in the Gaspé Region of Quebec, which formerly relied on copper mining. Located in a valley, the Town is not impacted by the sites or sounds of the wind plant, which is located in the surrounding mountains. Recreation in the area includes downhill skiing, hunting, fishing, and golf as well as the following tourism attractions: Outdoor Activity Centre, a Wind Energy Research and Development Centre, and a Copper Interpretive Centre. The wind turbines have been operational since 2005.

A representative from the Town noted that there was no resistance from Murdochville residents to the development of the wind plant. Moreover, the representative stated that since the plant opened there has been **a 10% increase in visitors to the Copper Interpretive Centre, which was largely attributed to visitor interest in the wind plant.**

3.2.8 Maple Ridge Wind Farm, Lewis County, New York

The Maple Ridge Wind Farm is located in Lewis County, New York, in an area called Tug Hill. Built by Portland based PPM Energy, the site holds 195 wind turbines and produces 320 MW of energy, capable of powering approximately 160,000 homes. Maple Ridge is the largest wind energy project in New York State covering 10,200 acres of leased land with a substation, access roads, and two meteorological towers in addition to the turbines.

Tug Hill is a rural setting extensively used in timber production, hunting and recreation, including snowmobiling and ATV'ing. The region is also one of the largest producers of maple syrup in the United States. Residents of the area did express some concerns about the development of the wind plant, primarily regarding possible noise and visual effects. Following the completion of the project, further issues arose such as problems with shadow casting and flicker effect from the turbines in addition to television reception problems. While the developer installed a digital antenna to help with reception problems, little can be done to prevent shadow casting, as this is an issue that must be dealt with during the planning stages; however, blinds on windows do assist in mitigating this potential effect. In addition to this provision, the development company also offers a *Neighbour Payment*, which consists of a \$2,000 month to payment for landowners adjacent to wind turbines who agree to abstain from any complaints or suits against the development.

The tradition of maple sugaring is widely recognized as an integral part of the community's identity, hence the name Maple Ridge. The opening of the plant included a family event in addition to the screening of the film entitled *Tapping Maple Ridge; A Film About Maple Syrup, Wind and Community*. The film explores the

parallels between maple sugaring and wind energy, both responsible uses of renewable resources and their importance to the community and its culture.

3.3 Potential Effects

It is difficult to consider the potential effects of a wind plant on cottaging, tourism and recreation (MOE criterion 6.3) in rural settings without first having an understanding of the possible environmental effects that the development may have on a locale. The reader should note that the purpose of this section is not to address the potential environmental implications of the proposed wind farm development on Wolfe Island as this is the purpose of the full Environmental Overview Report (ERR). Rather, the purpose of this section is to address the potential environmental effects that may in turn affect tourism and recreation in the area.

3.3.1 Potential Environmental Effects

The possible effects specific to Wolfe Island and its tourism and recreation will be further examined in the conclusion section of this report. There is, however, literature to suggest that the following possible effects may occur as a result of development of the wind plant:

- Environmental Noise – produced by the turbines;
- Visual Change – because this change is very subjective, there is considerable debate regarding the possible negative, neutral, and positive aesthetic effects of wind plants on the surrounding landscape;
- Short Term Construction Effects – this includes the effects of turbine construction activities in addition to electrical connections and access routes. Agriculture can, however, continue during and following wind plant construction given the small footprint of the facilities;
- Effects on Wildlife – the primary issue is the potential effect of operating turbines on birds, including the possibility of collision with the blades or migration interruption, rather than habitat loss or disturbance³²

The majority of these potential effects can be mitigated through the proper siting of the turbines, through the avoidance of sensitive ecological sites, and the provision of sufficient distances (setbacks) between the wind plant facilities and the nearest community. Based upon conversations with individuals whose community is home to commercial wind plants, further potential effects upon the immediate area may include:

- Shadow Flicker – the effect that wind turbines can have on sunlight to the area. This can result in a “flicker effect” which is the breaking up of the sunlight by the rotating blades of the turbine, resulting in a strobe light effect; and

³² *European Wind Energy Association, Environmental Impacts of Wind* www.ewea.org

- Ice Throw – although no recorded cases were reported in interviews undertaken by PKF Consulting, several interviewees stated that landowners fear that ice which has frozen onto a still wind turbine will get thrown off once the blades begin to rotate again, posing a potential danger to those in the area.

There are also many examples of the possible positive environmental effects of wind plants, some include:

- Wind energy is an economically competitive, renewable resource;
- Greenhouse gas emissions are reduced through the use of wind energy;
- Wind turbines provide financial benefits to farmers who lease out the land that turbines are built on, helping to keep lands in agricultural production;
- Wind plants occupy far less land than traditional power plants and are visually more pleasing; and
- Wind energy is the cheapest of all renewable energy technologies.³³

Wind plants can further benefit a region by enhancing its reputation as being environmentally friendly and providing access to remote areas.³⁴

3.3.2 Implications for Recreation, Cottageing and Tourism

Based on the experience of eight comparable Canadian and U.S. jurisdictions operating wind plants, there are generally three phases, which the local tourism industry undergoes in the development of wind plants:

1. Minor Opposition and Resistance to the wind farm development proposal;
2. General Acceptance and Understanding of the wind farm development; and
3. For those communities, which capitalize on the potential for tourism opportunities related to the wind farm operation, an associated increase in visitation and tourism revenues.

Furthermore, the comparable research suggests, that for the most part, the effects of wind plants on tourism have been positive, including:

- Enhanced reputation as a community in favour of green technology, in addition to enhanced awareness of alternative energy technologies by residents;
- New opportunities for guided and/or self – guided tours, or an additional attraction for existing tours;
- Retail opportunities from related souvenirs and materials;
- Opportunity to develop new interpretive signage materials, thereby enhancing existing tourism product and marketing materials;

³³ NRG Systems Wind Facts www.nrgsystems.com

³⁴ NFO System Three for VisitScotland Investigation into the Potential Impact of Wind Farms on Tourism in Scotland (2002) www.viewsofscotland.org

- Promotion of cultural characteristics and inclusion of renewable energy issues in community and cultural events;
- Potential access to previously remote areas for outdoor recreation enthusiasts via access roads;
- Opportunity for increased meetings and events from technical groups, renewable energy professionals, and educational groups; and
- Increased overnight accommodation, retail, and food and beverage demand during the construction phase of the development and potential increase in visitation from special interest groups, education groups, and tourists.

While the potential effects include an increase in environmental noise levels and a visually altered landscape, no supporting evidence was found to indicate that an area's tourism industry declined due to the effects purported with wind plant operations. Moreover the resulting effects are very subjective resulting in a variety of opinions on the matter. However, **the majority of the literature reviewed and people interviewed tended to believe that there was either a neutral impact or positive effect on tourism.**

4.0 TOURISM ASSESSMENT OF PROPOSED WOLFE ISLAND WIND PLANT

Several tourism stakeholders from Wolfe Island and Kingston were contacted to provide input into the proposed wind plant and its potential effect on the local tourism industry. A list of these stakeholders is provided in Appendix C. **An overwhelming majority of stakeholders interviewed felt that the wind plant would not have any negative effects on tourism once in the operation stage. Rather, they believed that the development would bolster the tourism industry, acting as a draw for additional visitors during both the construction and development stage.**

Several stakeholders consider the wind plant to be a much-needed development and an economic boost to the Island. In addition to revenue generated during the construction phase, the resulting tax dollars and Amenities Agreement will benefit the infrastructure of the Island. The following subsections outline tourism stakeholder issues and identifies potential tourism opportunities for Wolfe Island resulting from the wind plant.

4.1 Tourism Stakeholder Comments

The primary issue expressed by the Island's tourism stakeholders is that Wolfe Island's infrastructure will not be able to handle the stress expected from the transportation and use of heavy equipment, crews, and machinery, which in turn could temporarily affect commuters, cyclists, and automobile visitors. While stakeholders expressed a concern that commuters will be delayed in reaching their place of work on time due to possible ferry congestion, as well as longer ferry waits for tourists, they made the following suggestions to alleviate the potential problem:

- The commissioning of a water taxi for commuter use only;
- An additional ferry;
- Use the winter dock to load construction crews and equipment; and
- Transport equipment and construction crews only at off-peak times.

It is important to note that CHD is considering contracting a private ferry service for some of its shipments from Kingston to the Island to mitigate this concern. Moreover, Siemens is responsible for and is contracting independently to transport the large wind turbine components to the Island using other methods than the ferry. The goal is that visitors and residents will not suffer from a stressed transportation system; these efforts, however, are dealt with in greater detail in the Environmental Review Report (ERR),

Wolfe Island is also a very popular destination for cyclists. There are, however, no dedicated cycling lanes on the Island's road network, which poses a potential danger to cyclists, particularly as vehicles "race" between the Horne Ferry crossing and the Wolfe Islander III crossing in Marysville. Tourism stakeholders

expressed a concern regarding increased traffic due to heavy machinery and trucks, which has the potential to compound the existing safety concern between cyclists and motorists.

Comments were also expressed regarding the hunting industry on the Island. Although the proposed wind plant site is located on the western head of the Island, with duck hunting typically occurring on the eastern foot of the Island, there is some fear that the turbines may negatively affect the migratory patterns of birds. Again, this issue will be dealt with in greater detail in the Environmental Review Report.

4.2 Opportunities for Wolfe Island Tourism

Based on the experience of comparable wind plant operations in other Canadian and U.S. jurisdictions, as well as input by local and regional tourism stakeholders and European experiences, the addition of the proposed wind plant on Wolfe Island may generate the following new tourism opportunities:

Addition of an Interpretive Site/Attraction for Wolfe Island

As a new attraction for Wolfe Island, the wind plant could act as the catalyst for the tourism industry to provide visitors with an interpretive site, including the potential for:

- Weather proof interpretive panels located in designated pull off areas that explain the wind turbines as an alternative energy source;
- An interpretive map of the Island, highlighting the wind plant location as well as other Island attractions, such as Sandy Bay Management Area;
- Interpretation of the wind farm on the Wolfe Island Business and Tourism Association website and marketing materials; and
- The potential for an audio tape or CD for a self tour of the Island, which tourists could pick up at the Visitor Information Centre.

Expansion of Outdoor Educational Programs on Wolfe Island

Currently Wolfe Island is home to the Ryan Centre. Part of the Algonquin and Lakeshore Catholic District School Board, the Ryan Centre is an outdoor education centre. Based on the Ministry of Education's curriculum, the Centre provides outdoor and environmental education programs for approximately 2,000 students annually.

Currently the Centre is assisting the Algonquin and Lakeshore District School Board in reaching its goal of becoming an **Ontario Eco-School** through a 5% reduction of energy consumption, resulting in approximately \$110,000 in savings to the Board.

Further Opportunities for Agri-Tourism

The addition of wind turbines on agricultural lands and farms located on Wolfe Island, together with a buffalo farm operation, u-pick operations, corn maze, and a tranquil Island setting will provide unique opportunities to promote agri-tourism on Wolfe Island.

Marketing Brand Opportunity

As evidenced by comparable wind plant jurisdictions (e.g., Pincher Creek), the existence of renewable energy source can provide a "brand" to be utilized in regional marketing materials from both an economic and visitor perspective. Renewable energy provides a good fit with Wolfe Island's existing efforts in managing the environmentally sensitive area of the Sandy Bay Management Area.

Regional Co-Operative Marketing and Development Opportunities

Based on discussions with Tourism Kingston and Fort Henry representatives, there is an interest in working with the Wolfe Island Business and Tourism Association to promote the region's attractions, including Sandy Bay, nature trails, bird-watching activities, festivals and events, and the proposed wind plant development to visitors, educational groups, and special interest groups.

4.3 Summary Findings / Conclusion

In summary, based on the research findings to address MOE criterion 6.3 (i.e., *Will the project have the potential to have negative effects on recreation, cottaging or tourism?*), it is concluded that the proposed wind plant may have the potential to result in very limited or no negative effects (e.g., roads and ferry use) on recreation, cottaging, or tourism to Wolfe Island.

Based on the experience of eight comparable Canadian and U.S. jurisdictions operating wind plants, there are generally three phases, which the local tourism industry undergoes in the development of wind plants:

1. Minor Opposition and Resistance to the wind farm development proposal;
2. General Acceptance and Understanding of the wind farm development; and
3. For those communities, which capitalize on the potential for tourism opportunities related to the wind farm operation, an associated increase in visitation and tourism revenues.

Based upon the research, Wolfe Island attracts an estimated **107,000 visitors in 2006, representing over 150,600 person trips to the Island via ferry**, including:

- 1,500 seasonal cottagers (comprising 45,000 ferry trips);
- 7,700 overnight guests to 16 commercial cottage, hotel and bed & breakfast establishments;
- 1,355 pass through visitors enroute to US/Kingston ferry; and
- 96,570 day visitors

While there may be the potential for temporary inconvenience of visitors, cyclists, and cottagers on Island roads, as well as ferry congestion during the construction phase, from a tourism perspective no comparable cases were found that reported a decrease in visitor volumes to the area due to the addition of a wind plant, particularly in terms of hunting and bird watching activities. **Rather, the research indicates that wind plants can present opportunities for interpretation and provide an additional attraction/tour opportunity for both visitors and cottagers, contributing to increased tourism in the local area, while posing neutral effects to recreation.**

Furthermore, the majority of local tourism stakeholders interviewed on Wolfe Island and in Kingston felt that the wind plant would not have any negative effects on tourism once in the operation stage. Rather, they believed that the development would bolster the tourism industry, acting as a draw for additional visitors during both the construction and development stage.

APPENDIX A

WOLFE ISLAND FERRY SERVICES

There are three ferries that service Wolfe Island on an annual basis:

- Wolfe Islander III – Wolfe Island to Kingston
- Horne's Ferry – Wolfe Island to Cape Vincent, NY
- Simcoe Island Ferry – Wolfe Island to Simcoe Island

The Wolfe Islander III makes 19 crossings per day, and is in operation all year. It holds approximately 55 cars and 330 passengers per trip, and each trip takes approximately 20 minutes.¹ In 1946, the Ontario government bought the Wolfe Islander II and in 1964, the province assumed ferry control and initiated free access.² The ferry operates from the Marysville Dock in the summer, until ICE IN at which time it moves to the Dawson Point Dock (winter). Along with serving thousands of visitors from both Canada and the US, it also serves as the life-line to the Island residents.

Horne's Ferry is an independently owned service that makes 11 crossings per day, and acts as the first leg of a 2-part Ferry crossing, involving The Wolfe Islander III, taking visitors from Cape Vincent, NY to Kingston. The ferry lands right in downtown Kingston so visitors can leave their cars on Wolfe Island (parking is free) and walk on to the second ferry. Horne's Ferry operates from Monday to Friday, and rates are set as follows:

- Car & Driver: \$10.00 CDN
- Passengers: \$3.00 CDN
- Motorcycles: \$7.00 CDN
- Same-day return fare for a car driver and passengers: \$5.00 CDN

The **Simcoe Island Ferry** links Wolfe Island to Simcoe Island and operates seasonally on demand.

¹ www.wolfeisland.com (Accessed December 20, 2006)

² *Ibid.*

APPENDIX B

List of Comparable Jurisdiction Representatives Interviewed

1. Anne Arsenault, Western PEI Tourism Association, PEI
2. Jessica Bigbull, Pincher Creek Chamber of Commerce, Alberta
3. Wendy Kalkan, Municipal District Development Officer, Pincher Creek, Alberta
4. Lisa Hohban Brusse, Executive Director, Hills of Headwater Tourism Association, Orangeville, Ontario
5. Jon Tefler, Economic Development Officer, Shelburne, Ontario
6. Ralph Laviolette, Huron Tourism Association, Goderich, Ontario
7. Bob Marshall, Tourism Goderich
8. Stephen Murray, Kincardine Economic Development Officer, Ontario
9. Clark Hoskin, Norfolk County Tourism and Economic Development Officer, Simcoe, Ontario
10. Jean Marie Chretien, Murdochville, Quebec
11. Renee Beyer, Lewis County Planner, New York

APPENDIX C

Local Tourism Stakeholders Interviewed

1. Linda Thomas, Wolfe Island Business and Tourism Association
2. Linda Van Hal, Friends of Big Sandy Bay Management Area, Sandy Bay Stewardship Council, and B&B Operator, Wolfe Island
3. Margaret Knot, Reporter and Resident, Wolfe Island
4. Walter Sepic, Director Wolfe Island Center
5. Kenny White, Owner and Operator, Whites Rides, Wolfe Island
6. Garth Walker, Owner Operator, Corn Maze, Wolfe Island
7. Elgin McCrady, Owner Operator, Riverfront Golf Course, Wolfe Island
8. Mustafa Ismail, Owner Operator, Wolfe Island Restaurant and Marina, Wolfe Island
9. Rod MacDonald, Wolfe Island Manor Bed & Breakfast, Wolfe Island
10. Rob Carnegie, Director of Tourism, Tourism Kingston, Kingston
11. Bryan Mercer, Director of Marketing, Fort Henry, Kingston
12. Terry O'Shea, Clerk, Municipality of Frontenac Islands, Wolfe Island
13. Bruce Horne, Horne's Ferry, New York
14. Terry McRae, Ferry Supervisor, Ontario Ministry of Transportation, Kingston
15. Cheryl Carpenter, Ontario Ministry of Transportation, Marine Services, Kingston
16. Jeff Garrah, Kingston Economic Development Corporation