

2017

ANGLING



NORTHERN ONTARIO
ANGLING
TOURISM PLAN



Contents

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Priorities for Tourism in Northern Ontario

With a vision of building a unique and distinctive tourism destination wherein high quality products and experiences resonate with consumers, entrepreneurship is valued, and tourism provides local, regional and global connections for the entire region, Tourism Northern Ontario (TNO) has established a mission designed to grow tourism in the north.



Mission

Tourism Northern Ontario will take a leadership role to strategically guide and champion growth in Northern Ontario's tourism industry, through strong communication, collaboration and partnerships with industry.



Governed by its funding agreement with the Ministry of Tourism, Culture and Sport (MTCS), Tourism Northern Ontario is contracted to enhance services in the following six pillars of tourism.

- 01** Governance & Administration
- 02** Product Development
- 03** Marketing
- 04** Workforce & Industry Training
- 05** Investment Attraction
- 06** Partnership

TNO Strategic Plan 2017-2020

TNO's activities under each of the six pillars of tourism are steered by strategic objectives, which are outlined in detail in the *Tourism Northern Ontario 2017-2020 Strategic Plan*. Objectives related to each of the pillars are as follows:

01 Governance & Administration

- Enhance organizational excellence related to board policies, procedures and provincial conflict of interest policies
- Ensure roles and responsibilities are effectively allocated, adhered to and reviewed
- Ensure service contracts with outside organizations reflect TNO mandate
- Establish quantifiable performance metrics with clear targets across all pillars to ensure TNO strategic efforts are translated into improved regional performance
- Continue to expand awareness of TNO and its activities within existing and new stakeholders groups
- Improve capacity for communication and outreach across Northern ON and develop advocacy position on key issues

02 Product Development (including research)

- Implement an experience shift, focusing on best bet products and experiences
- Implement TNO wayfinding strategy and initiate visitor information centre training
- Implement a quality shift, building consistent quality offerings and customer service
- Continue efforts to translate product development and target market research into action and track results
- Develop and implement a strategic research plan to track tourism business performance

03

Marketing

- Align and coordinate programs/ tactics common to all sub-regions and encourage collaborative marketing of products and experiences intra-regionally
- Refresh and implement new 5 year marketing strategy with Ontario Tourism Marketing Partnership Corporation's (OTMPC) northern office
- Ensure customers are easily connecting with Northern Ontario operators through appropriate marketing vehicles

04

Workforce & Industry Training

- Work in collaboration with regional partners to leverage funding resources and implement workforce training plans
- Build TNO's resource role to educate stakeholders on training opportunities across the region

05

Investment Attraction

- Build the bridge to connect Northern Ontario's investment community partners and funding agencies and encourage investment attraction across the region

06

Partnership

- Continue to build long term relationships with industry partners, focus on projects that show progress beyond marketing, and increase available partnership funding for TNO



Marketing Strategy 2017-2020

Key issues outlined in the *Strategic Direction for Marketing Tourism in Northern Ontario 2017-2020* prepared in conjunction with OTMPC, as they relate to product development for Northern Ontario include:

- The need to position Northern Ontario's unique experiences as the key element of the offer;
- The need for alignment, collaboration and effective planning and partnerships between RTOs, DMOs and OTMPC as well as northern tourism stakeholders to create marketing strategies, programs and partnerships that increase visitation and spending;
- The need to continually improve and adapt existing Northern Ontario tourism products, targeting avid and niche travellers with a consumer's first philosophy;
- Prioritizing Northern Ontario's geographic markets, specifically focusing on travel corridors of the Great Lakes/near border US states and domestic Ontario;
- Continue to invest in research and monitoring of consumer and market conditions;
- Invest in travel trade and group tours that connect with Signature Experiences;
- Leveraging meetings and conventions as connected back to business tourism, in relationship with Gateways and Urban communities; and
- Utilize Northern Ontario's competitive advantage of accessible, pristine outdoors and wilderness.

Marketing efforts will focus around:

- Improved distribution and engagement of traditional media approaches, including avid oriented consumer shows, media marketplaces and media relations which will generate and leverage stories for digital outlets, focusing on earned media stories;
- Investment in digital distribution and engagement, working to align content from traditional media paths utilizing metrics, influencers on targeted tactics focused on specific consumer segments;
- Emphasizing perceived distance to market (visitor's travel distance to get to Northern Ontario) as an opportunity to explore and have a variety of experiences along the way; and
- Enhanced measurement and ROI tracking measures in place.

Building upon the 2012-2017 *Strategic Direction for Marketing*, the 2017-2018 Tourism Northern Ontario marketing focus will establish TNO's role as a leader in marketing of Northern Ontario aligning with the sub-regions, region and OTMPC. TNO's implementation plan prepared in response to the Strategy outlines three areas of focus:

- 1 Strategic planning, implementation, performance and reporting.
- 2 Supporting destination brands at the provincial, regional and sub-regional levels.
- 3 Marketing priority products & experiences:
 - » Angling & Hunting
 - » Cultural & Heritage
 - » Gateways & Urban Communities
 - » Nature & Adventure
 - » Touring

Utilizing the key foundational elements outlined in the Marketing Strategy, the TNO 2017-18 Marketing and Action Plan calls for:

- Implementation of a pan-Northern initiatives under the "consumer first" philosophy of seamless borders for the visitors, while supporting destination brands and marketing;
- Working closely with OTMPC early in the planning cycle for the six priority products and experience areas;
- Working within Provincial branding activities to provide pan-Northern "lure" pieces to drive consumer planning; and
- Engaging customized tactical service agreements under multi-year contract to ensure consistent implementation of TNO's marketing plan.



TNO Product Development Plan & Research

Tourism Northern Ontario has taken a priority approach to research in the last five years and has focused its efforts by defining strategic priorities based on this research. This strategic approach has led TNO to focus on creating quality visitor experiences through both quality and culture shifts in the Northern Ontario tourism industry. This focus has led to a reallocation of resources, placing more effort on product development and moving resources from the more traditional marketing practices with the forethought of creating a stronger more powerful tourism region in the long run.

Research summaries completed for TNO by Research Resolutions & Consulting provide a situation analysis with an in depth look at the market and its size in Northern Ontario.

The reports focus on the following areas:

- North American Motorcycle Tourists (2014)
- North American Hunters (2014)
- Attraction Tourists (2014)
- Festivals & Event Tourists (2014)
- Snowmobile Tourists (2014)
- High Yield Nature/Outdoors Tourists (2013)
- High Yield Anglers (2013)

When the above research reports are compared in the summary report *Overview of Tourism Opportunities for Northern Ontario*, the following findings are drawn¹:

- The outdoors is a salient if not core element in the lure of Northern Ontario for tourists in each segment.
- Many Canadian tourists are near locals who billet with friends and relatives, stay in their private cottages or in campgrounds in Northern Ontario. Conversely, American tourists in each segment tend to rely on paid roofed lodging during their stay.
- Almost by definition, niche markets tend to be relatively small. For example, the markets for motorcycle touring and hunting are more limited than the markets for festivals and events or attractions.
- Some activities offered in Northern Ontario are more apt to be the reason for taking a trip whereas others tend to be one-of-many activities a tourist engages in during a trip driven by other purposes. Fishing, hunting and motorcycle touring are segments with strong motivational elements whereas festivals and events or attractions more commonly provide tourists with things to see and do on a trip taken to see friends and relatives or for general pleasure purposes.
- The physical realities of distance from major population centres, limited transportation corridors and climate restrict the size of potential markets for Northern Ontario.

¹ Research Resolutions & Consulting, *Overview of Tourism Opportunities for Northern Ontario (RTO13)*, July 2014.



1.3 » TNO Product Development Plan & Research

The *Northern Ontario Product Development Strategy*, also completed in 2014 examined not only current tourism products that were available, but also experiences that were under development and future product opportunities. It matched these experiences with priority markets to determine where Northern Ontario should focus its product development efforts in the coming years as follows:

| PRIMARY FOCUS | SECONDARY FOCUS | TERTIARY FOCUS |
|------------------------------|--------------------|------------------------------|
| Fishing | Motorcycle Touring | Boating/Great Lakes Cruising |
| Nature & Adventure | Hunting | ATV |
| Auto/RV Touring | | Snowmobile |
| Gateways & Urban Communities | | Aboriginal |

Recommendations in the report not only focused on the tourism experiences in Northern Ontario, but encouraged an administrative shift to focus more resources on product development and increasing the quality of available experiences.

As a result of recommendations in the *Product Development Strategy*, six Northern Ontario Product Development Committees were formed in 2015. These teams aid and advise Tourism Northern Ontario on the enhancement and development of their product area in Northern Ontario.



Angling – the Current Context and Research Findings

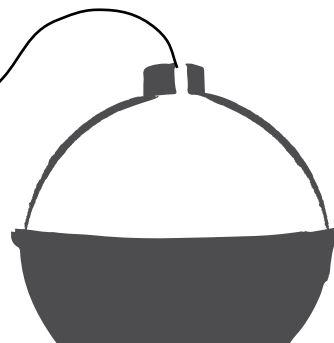
Case Studies

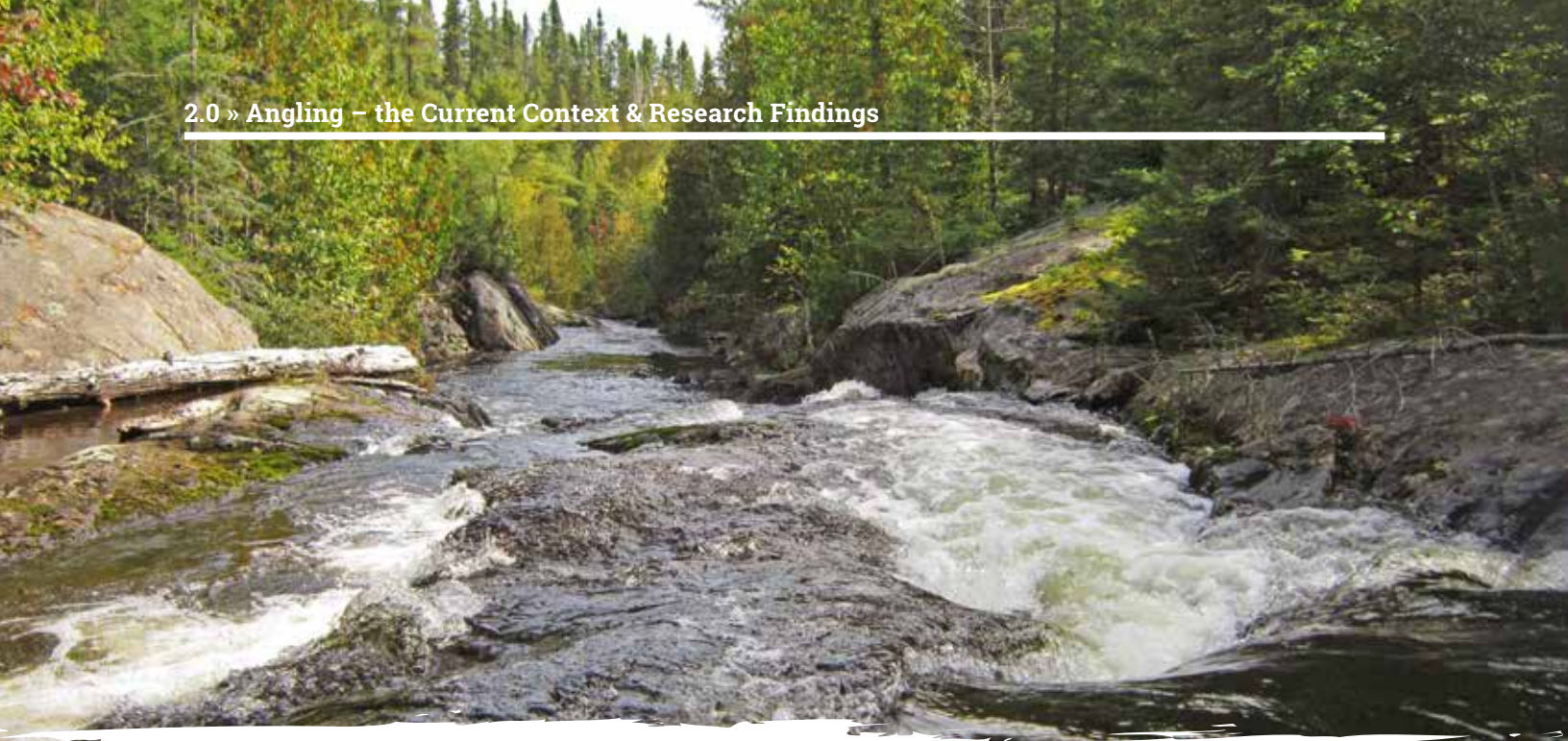


United States *Recreational Fishing as Tourism* Research

The 2002 report *Recreational Fishing as Tourism* examines the popular outdoor activity of fishing as a major form of tourism when anglers travel out of state to go fishing. Individual U.S. states have undertaken tourism promotion efforts that include recreational fishing. The top five states that were recreation fishing tourism destinations for non-residents, as well as supplying anglers to others were Minnesota, Florida, Wisconsin, North Carolina and New York. The top five states for exporting residents for fishing

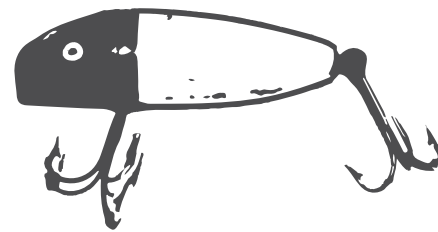
were Illinois, Texas, Pennsylvania, California and Virginia. This report also provides the stakeholders' perspectives of the managers and resident anglers on fishing and tourism issues. In addition, it explores ecotourism and how it would apply to fishing being exported to other states. Recommendations for fishing managers to gain greater awareness of fishing tourism in their home states and the development of partnerships with state and local tourism organizations are included.





Manitoba's Master Angler Program and Ontario's Angler Awards –

For over 50 years, Manitoba has been promoting its Master Angler program, designed to document trophy fish caught and reward anglers for releasing their catch. In 2013, approximately 10,000 trophy fish were caught and recorded under the program (which now includes a digital app) and almost 90% of the fish were released. The program was expanded in 2002 to include the Li'l Anglers program, documenting and rewarding children for their first catch and release.



In 2004, the Ontario Federation of Anglers and Hunters began the Ontario Angler Awards program. The program, which also rewards anglers for catching trophy fish, has received 59,000 entries since 2004 and has 20,000 registered users. Qualifying entries receive a certificate, decal and an Avid Angler Award is sent to anyone completing five categories in one season.



St. Lucia Caribbean Fish Fries

Friday night and weekend fish fries in the Caribbean have become popular tourist attractions.

In St. Lucia, some 20 years ago, Gros Islet village invited tourists from the neighbouring hotels to sample fish, freshly caught by the community's fishermen and prepared using local culinary skills. Rum and local music added to the fun. Over time, the number of vendors increased and the popularity of the event grew among island visitors, turning it into a product that attracted worldwide publicity. The Friday night street party became one of St. Lucia's major tourist attractions.

More recently, the fishing village of Anse-la-Raye decided to put on its own fish fry as an alternative to what was being offered at Gros Islet. To ensure that the event would be as professional as possible, a workshop on food-handling and preparation was held, conducted by one of the island's foremost chefs and was attended by all the vendors. When the villagers were ready, Anse-la-Raye's "Fish Friday" (ALRFF) was born.

It began earlier than Gros Islet, as an after-work event. The major fare was only fished out of the sea – lobster, octopus, Dorado, shrimp, lambi, whelks and more. The concept has proven to be a major success, surpassing all expectations.

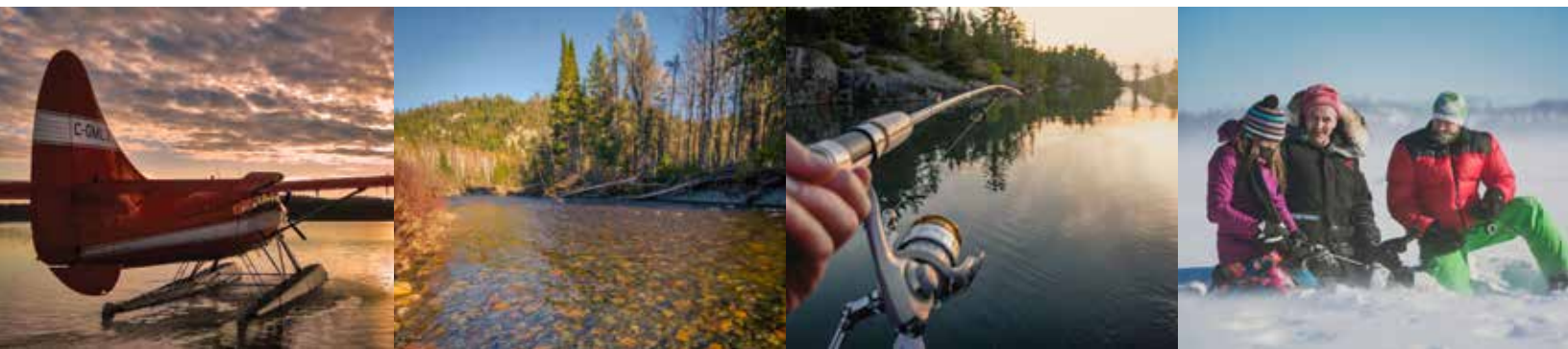
Gail Henry, Sustainable Tourism Product Specialist for the Caribbean Tourism Organization identified the following key lessons regarding the ALRFF:

- Local government can play a central role in facilitating community-based tourism initiatives;
- Political support can be critical to the early success of an initiative and the speed at which it develops;
- Inclusive consultation, a shared vision of tourism, a holistic approach to product development and building local management capacity are important;
- Skill training is important in establishing a quality tourism product and building the management capacity to sustain it;
- Technical and financial assistance and ongoing support from other stakeholders can make or break a project;
- The combination of market intelligence, consistent product concept and standards and business entrepreneurship are crucial to success;
- A regular review process to maintain product concept and quality is important;
- There may be trade-offs between authenticity and income-generating activity, particularly where there is a lack of local craft tradition and imported crafts are retailed;
- Tourism development does not have to be based on a natural attraction. Well-organized events can create new economic opportunities for a wide cross-section of the community; and
- Environmental impacts need to be managed.

Current Provincial & National Context

The angling market is aging. Studies in both Canada and the U.S. support the notion of a declining market for fishing. As such, it is imperative that the industry put energy into reinventing itself and appealing to new and younger markets to maintain momentum into the future.

Research summarized in the 2014 *Northern Ontario Tourism Product Development Strategy* showed that the demand for angling as a recreational and tourism activity is giving somewhat mixed messages.



Fisheries and Oceans Canada have been completing detailed surveys of recreational fishing in Canada since 1990. These five-year databases provide consistent data to analyze trends in sport fishing. *Survey of Recreational Fishing in Canada 2010* found:


- The number of non-resident anglers (tourist anglers) in and to Canada had declined, particularly the anglers that are not from Canada;
- Overall trends show a 9% annual average decline during the period 2005–2010, a figure more than double the decline from 2000–2005; and
- In 2010, there was a total of 147,000 non-resident Canadian anglers in Canada and 406,000 non-resident foreign anglers, primarily from the U.S. Non-resident Canadian anglers had declined 2% from 2005 and the non-resident foreign anglers had declined by 35% (average of 9% per year), double the decline that occurred between 2000 and 2005;
- The prairies have the highest percentage of non-resident Canadian anglers at 69%.

The 2013 Ontario Fish and Wildlife Consumer Research survey completed for the Ontario Ministry of Natural Resources and Forestry (MNRF) by Harris Decima provides insights relevant to product development including:

- Potential new anglers seem to lack an entry point and would benefit from an 'introduction' or 'learn to' program to break down real and perceived barriers;
- Lapsed anglers would benefit from a reminder to make time for fishing;
- Experiences that link fishing to relaxation, family memories and a connection with the outdoors will broaden the appeal of fishing beyond avids.
- 46% of respondents hold a sport fishing license, while 36% hold a conservation license.

Research completed on U.S. anglers by the American Sportfishing Association (ASA) and the Association of Fish & Wildlife reported:


- There are 60 million anglers in the U.S. of which 46 million fish in any given year; one in four fish in saltwater
- Angler numbers grew 11% between 2006 and 2011 with Great Lakes anglers growing by 17%;
- The average U.S. angler spent \$1,441 (US\$) annually on fishing



Great Lakes
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17%
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In 2010, Anglers contributed
\$2.2 Billion
to the Ontario economy

Further, environmental issues are the forefront in the province of Ontario. Ontario's Provincial Fish Strategy – *Fish for the Future* provides insight into the fishery resources in the province, with the objective of management and conservation. Provincial tourism statistics included in the report include:

- In 2010, more than 1.2 million resident and non-resident anglers fished in Ontario, more than any other province or territory in Canada;
- Anglers fished an estimated 17 million days in 2010 and contributed \$2.2 billion to the Ontario economy;
- Ontario's fisheries provides 41,000 person years of employment annually;
- Fishing is a key tourism driver in Ontario, with a large number of international anglers attracted to the Great Lakes and the pristine waters of Northern Ontario;
- 1,600 tourist operators exist in the province;
- Of the approximately 1,600 resource-based tourism sites in Ontario, nearly 1,140 are not accessible by road and are located in Northern Ontario. They attract 90% of fishing-focused visitors. These remote tourism fisheries are a key economic component in many northern communities, generating more than \$100 million in revenues each year.²

² Ministry of Natural Resources and Forestry, *Ontario's Provincial Fish Strategy – Fish for the Future*, 2015.

Northern Ontario's Current Angling Tourism Situation

Both the Northern Ontario Tourism Marketing Strategy for 2017-2020 and the 2014 *Northern Ontario Tourism Product Development Strategy* cite angling as primary focus or priority area for product development and marketing in the coming years.

The *Product Development Strategy* called for an “Experience Shift” – the narrowing of experiences and product development to high priority product areas with the overall goal of focusing efforts on product development with the most potential to advance tourism in Northern Ontario. The strategy stated: “Northern Ontario must build off its successes and opportunities by focusing on best bet product areas for the future”.

To determine focus areas, detailed product and market assessments were undertaken. They examined capacity, quality and competitive advantage of current and potential products and reviewed the profile needs and longer-term sustainability of core and niche visitor markets specific to Northern Ontario. Based on the research undertaken as part of the strategy, the resulting product/market match identified the Northern Ontario products with the most opportunity. Among these products was angling, which boasted the most trips and the highest spend by tourists in Northern Ontario.

The *strategy* outlines the foundations for product development activities, including the following key factors:

- Start with best bets;
- Position for sustainability by anticipating where the market is going;
- Leverage best-in-class operators/assets to inspire and motivate others; and
- Focus time, resources and effort on opportunities with enough critical mass and appeal to match the markets and type of traveller that Northern Ontario wants to attract.





Specific recommendations found in the *strategy* surrounding the primary focus area, angling, include:

- Retain and increase the current avid fishing market through innovation, quality and amenity upgrades to address the aging market and diversification of the current offer with products such as fly-fishing and trophy fishing.
- Create a non-avid fishing product development team and investigate opportunities to broaden focus from avid to non-avid including families, women, social groups and those who are physically-challenged; consider a series of *Experience Fishing* offers to support those new to fishing.
- Investigate options for use of lodge, resort and camp facilities and services by non-anglers for alternative activities.
- Investigate opportunities to attract the near-market overnight fishing market.³

³ The full list of Strategy foundations and recommendations can be reviewed here:
https://tourismnorthernontario.com/wp-content/uploads/2016/08/2014_northern_ontario_product_development_strategy.pdf



2.4 » Angling – the Current Context & Research Findings

The report findings substantiate that Northern Ontario offers some of the best fishing in North America and attracts tourists from across the continent to its lakes and rivers. These factors secure angling as a signature experience for the region and as a core focus of TNO and other stakeholder organizations across Northern Ontario.

A focus group session was held in 2015 to discuss the SWOTT surrounding Northern Ontario angling tourism products (see [Appendix I](#)). The meeting gathered individuals experienced in angling tourism development in Northern Ontario and allowed the formalization of the Angling Product Development Committee,

(for more information on the committee's role and purpose, please see [Appendix II](#).)

Supporting the notion of the need to expand fishing opportunities to non-avid anglers and to attract new anglers to the north, TNO undertook an *Experience Fishing Implementation Plan* in March of 2017. The plan outlines the steps required to develop a fishing program in the French River designed to build upon the current MNR *Learn to Fish* program and to attract new Canadians, women and children to experience the sport at a Northern Ontario location.



The Case for Angling Tourism Product Development in Northern Ontario

Several factors make angling a key product for further development in Northern Ontario:

- The Northern Ontario Product Development Strategy lists fishing as a primary area of focus for product development;
- There is direct alignment with the 2017–2020 Marketing Strategy which includes angling as a priority area for marketing resources;
- Angling is the top-performing tourism product in Northern Ontario in terms of visitor spending and number of trips, making it a product of key importance; and
- The size of the current market and the importance of angling tourism to the Northern Ontario economy intensifies the need to expand the offer to attract new anglers who will sustain the industry and replace current avid anglers as they age.



Angling Tourism Product Development Work Plan for Northern Ontario

There are several steps that can be undertaken to further develop angling tourism in Northern Ontario with three main areas of focus:

- Establishing a new market of anglers;
- Focusing angling product development efforts; and
- Ensuring natural resources are protected and infrastructure is maintained.

9 Steps to further Develop Angling Tourism in Northern Ontario:





STEP 1: Implement the Experience Fishing Program

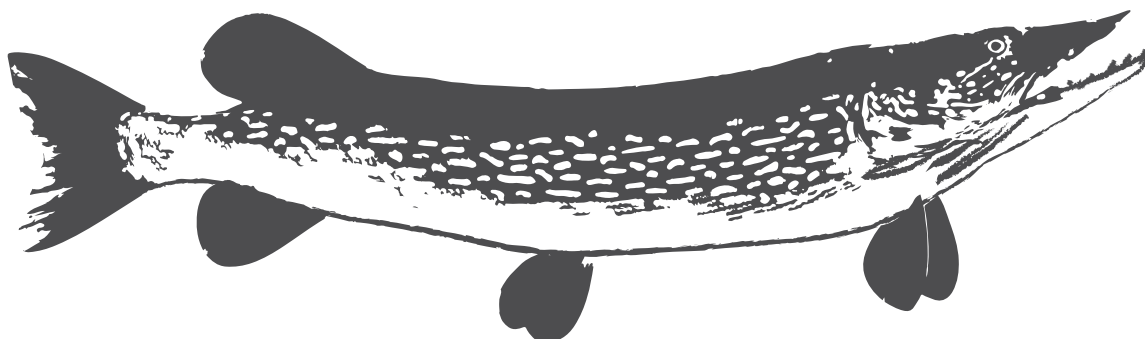
It is imperative that a new market of anglers is introduced to and becomes interested in the sport of fishing in Northern Ontario to maintain the tourism potential of this tourism product into the future. Building off the MNR's *Learn to Fish* program, an implementation plan has been completed to expand this program to Northern Ontario. Dubbed the *Experience Fishing* program, the plan outlines the possibility to start a pilot program in the French River area, and the need to create collateral materials to support and market the program to women, children and new Canadians.

To continue the momentum on this important project, the plan, which was completed under the guidance of a steering committee, should be implemented during 2017 following the timeline as outlined in the plan.

J **Timeline:** Short term

Northern Ontario Angling Product Development Committee Role:

- Support the *Experience Fishing* steering committee and TNO as they undertake the implementation of the program





STEP 2: Youth Program

Timeline: Short to Medium term

Youth represent the future angling market. Building congruently with the *Experience Fishing* program, an opportunity exists to develop a program or package aimed at attracting youth to fish in Northern Ontario.

Partnering youth with a current avid angler to partake in the sport represents a way to get additional traffic to Northern Ontario fishing lodges in the near term and to increase the interest of the youth market for the future. The program, which should be targeted at select sites based on a set of criteria to ensure applicability to the youth market, could include such options as:

- Discounted or complimentary youth angling packages at select Northern Ontario lodges when accompanied by a paying adult;
- Free perks for avid anglers and an accompanying youth booking and angling package at a Northern Ontario lodge. Incentives should be valuable enough to entice a potential traveller to book a vacation and could include, for example, free entrance at nearby family-friendly attractions, corporate-sponsored fishing gear to take home, complimentary dining, a chance to enter a contest or be part of a celebrity event etc.;
- A coupon or discount program for families that have taken part in the *Learn to Fish* or *Experience Fishing* program;
- A discounted or subsidized travel program for anglers booking a Northern Ontario fishing vacation package with an accompanying youth of a predetermined age. Partnerships with corporate providers could be negotiated to support the subsidy.

Further, creating or supporting an angling event targeting youth can help in introducing them to the sport. Programs like the Algoma Fish & Game Club's Children's Perch Derby or St. Joseph Island's Ernie Eddy Memorial Children's Ice Fishing Derby, which attracted 186 children in 2010, provide a safe and inexpensive way for the region's (and potentially visiting) children to try out the sport and potentially become life-long anglers.



Partnering to provide youth with angling education in market can invoke interest among the demographic. A partnership or education program could be implemented, developed or sponsored to target youth in Southern Ontario and nearby U.S. cities. Select examples of educational programs include:

- In 2014, the Ontario Federation of Anglers and Hunters partnered with the Kentucky-based National Archery in the Schools program to attract youth to outdoor activities such as hunting and fishing. <https://www.ofah.org/programs/national-archery-in-the-schools-program-nasp/>
- The Ontario Federation of Anglers have partnered with sponsor Ontario Power Generation to raise the awareness of students in Atlantic salmon rehabilitation and environmental awareness. The Atlantic Salmon Classroom Hatchery Program is currently in 100 schools from Hamilton to Kingston and has a waiting list to join. <http://www.bringbackthesalmon.ca/classroom-hatchery-program/>
- The National Fishing in Schools program seeks to teach students how to fish and includes learning centred around fish, aquatics and how to cast. The program provides the details needed to implement the resource in the classroom including lesson plans, training, support and equipment. <http://www.flyfishinginschools.org/>

Determining the best approach to target the youth through marketing, and developing partnerships and enticing offers will be a key component of the youth program. Establishing incentives directly connected with the youth program details is essential to undertake prior to marketing the package to avid anglers and youth.

Northern Ontario Angling Product Development Committee Role:

- Support the development of a youth program in conjunction with TNO and angling partners



STEP 3: Define and Determine Angling Product Development Focus

J **Timeline:** Short term

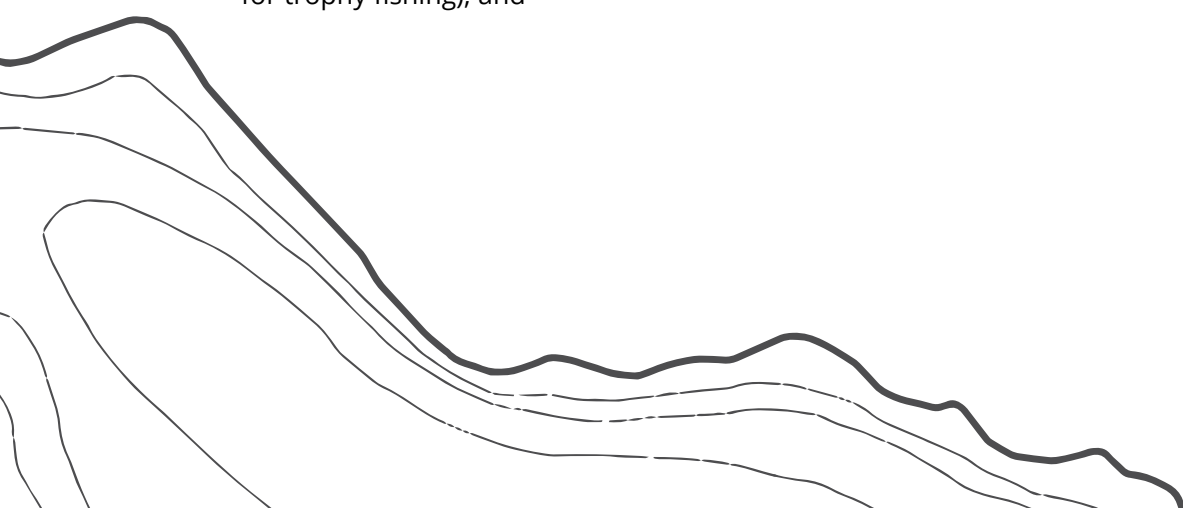
Preliminary findings indicate the potential for further product development of several different types of tourism-related angling in Northern Ontario. Potential opportunities relate to (but are not limited to) kayak fishing, trophy fishing, fishing tournaments, fly fishing and angling using a Northern Ontario lodge as the basecamp.

With so many options and a multitude of potential sites in Northern Ontario to support each of these experiences, it is imperative to define the angling experience in Northern Ontario, determine a focus and begin with tactics aligned with that focus. To make an informed focused decision, research is needed to:

- determine the potential market size in terms of the number of visitors and potential tourism spend for each type of fishing experience;
- the products available to match with the market and each product's current state of readiness or quality (additional research may be needed to determine the product and supporting asset availability, for example the quantity and quality of lodge based angling opportunities or the species of fish available for trophy fishing); and
- the competitive factors to ensure that Northern Ontario can competitively entice visitors to partake in the experience.

Northern Ontario Angling Product Development Committee Role:

- Review research findings and support focus decision by TNO





STEP 4: Asset Inventory & Market-readiness Assessment

Timeline: Medium term

An in-depth inventory of the angling assets that fit the focus that TNO has decided to pursue will allow an objective look at the assets that are available within Northern Ontario. Key assets should be assessed for market-readiness and quality.

Criteria will need to be developed to complete the market-readiness assessment. Among other factors, the assessment tool should:

- consider the potential different types of experiences that may be included in the focus area (for example lodge fishing may include different criteria for drive-in vs fly-in experiences);
- consider criteria that could be included to appeal to the new market of anglers; and
- include criteria that fit the recommendations of the *Product Development Strategy* to ensure that the quality of the Northern Ontario angling product is consistently top notch.

Market-readiness assessment of key Northern Ontario angling assets and opportunities will allow TNO and the Angling Product Development Committee to choose best bet asset(s) to focus effort on in the near term. Focusing on key locations will ultimately ensure objective and strategic assignment of resources and will allow TNO to market best bet products that are market-ready and able to attract visitors in a competitive market.

Northern Ontario Angling Product Development Committee Role:

- Provide input and feedback to the proponent undertaking the inventory and market-readiness assessment including criteria development
- Review market-readiness outcomes



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STEP 5: Implement Product Enhancements

Implementing product enhancements to make the assets fully market-ready takes time and money. Starting with the best bet operators, gaps in market-readiness should be addressed. Often during this stage, partners are eager to jump to marketing. Ensuring the changes are implemented before marketing will ensure market-readiness.

📅 **Timeline:** Medium to long term

Northern Ontario Angling Product Development Committee Role:

- Review and monitor progress





STEP 6: TEN Program Tools for Encouraging Quality Shifts

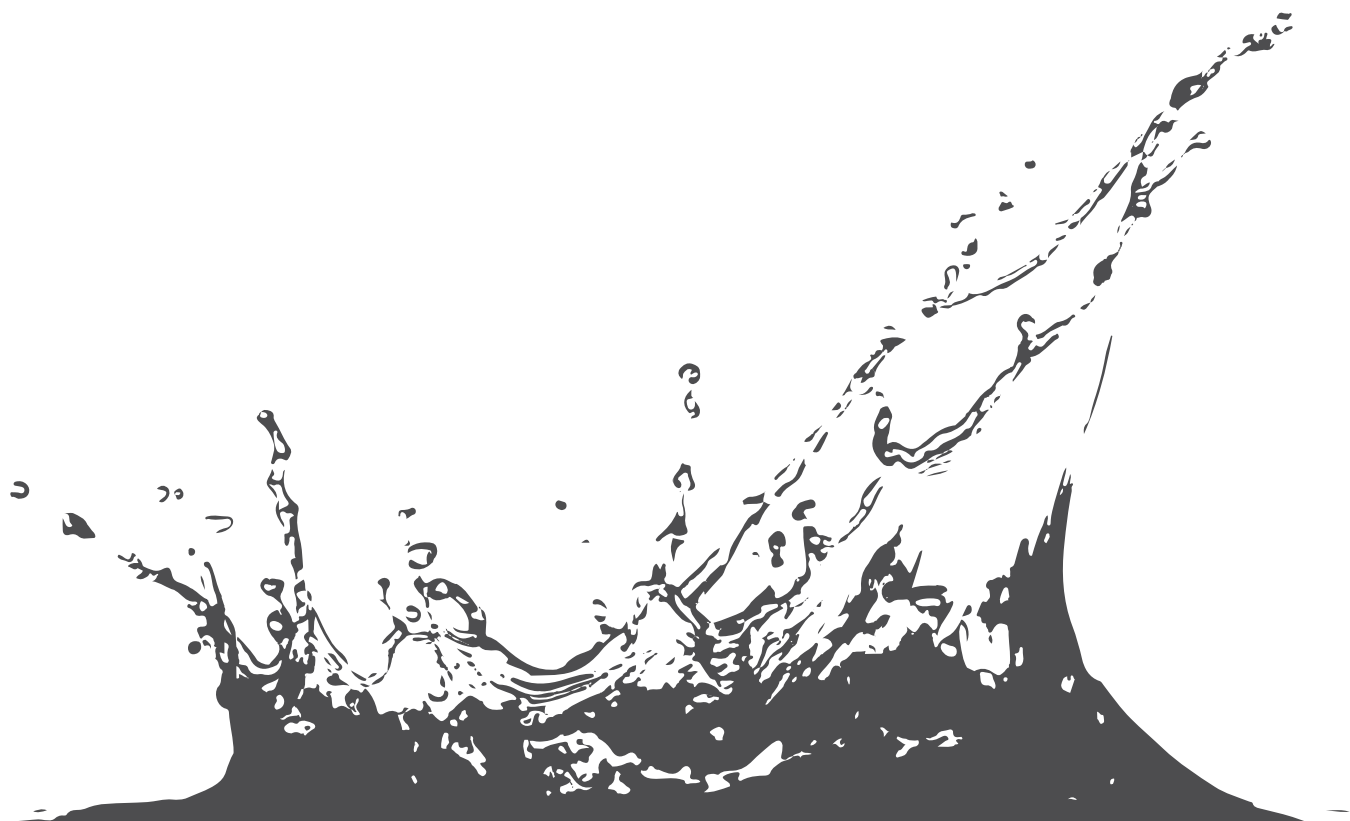
To make the Northern Ontario angling experiences exceptional, tourism assets that support the focus being pursued should be quality, market-ready establishments.

Encouraging supporting operators, starting with the best bet operators, to take part in the Tourism Excellence North (TEN) self-assessment, Fast Track to Success and/or group learning program tools will help to ensure the operators are focused on the quality of their establishment and providing the best possible experience to travellers.

Timeline: Medium to long term

Northern Ontario Angling Product Development Committee Role:

- Endorse and champion benefits of TEN to supporting operators





STEP 7: Angling Marketing Plan

Once product development has been completed, the experiences can be marketed. Collateral such as photography and video may be needed.

An angling marketing plan should outline tactics to be used to push the appropriate focused experience(s) to consumers. It should also address marketing tactics to be undertaken under the *Experience Fishing* program, the youth program (with different messaging for the avid and youth markets) and the angling focus area. Care should be given to ensure that tactics align with and leverage provincial angling tourism marketing efforts.

J Timeline: Long term

Northern Ontario Angling Product Development Committee Role:

- Review marketing plan and provide feedback on tactics





STEP 8: Advocate and Educate for Supporting Infrastructure and Capital Investments

Timeline: Ongoing

In line with the development of key angling experiences in Northern Ontario, ongoing advocacy is needed in the following areas:

- to ensure the development and upkeep of infrastructure that supports angling experiences (i.e. access points, docks, marinas etc.);
- to demonstrate the need for capital resources to support upkeep and development of supporting public facilities, as well as the expansion, upkeep and growth of small businesses;
- to shift requirements for capital funding from creating jobs to increasing visitation, increasing the quality of the establishment and/or attracting a new audience; and
- to ensure proper land use planning.

Education and support is also needed to ensure operators understand the benefits of reinvesting in their businesses and have tools needed to secure funding. Potential actions could include:

- communication initiatives designed to educate operators of the benefits of reinvestment including the ability to appeal to new markets, and
- support mechanisms designed to assist small businesses when they approach funding and investment agencies for the capital to undertake reinvestments.

Northern Ontario Angling Product Development Committee Role:

- Work with NOTO and TNO on advocacy and education initiatives where support is needed.



STEP 9: Advocate and Educate to Protect Resources

J **Timeline:** Short to medium term

Protection of fishing resources will ensure the preservation of this natural resource for future generations to enjoy.

It is important to align the fishing sector to support an appropriate balance of use of the available resources; to embrace the regulatory framework to ensure conservation and sustainability; and to advocate for responsible business and recreational practices.

Further, education of anglers with respect to conservation tactics will help to sustain the resource and change the culture from one of fish retention and consumption to a catch and release approach focused solely on the experience of fishing. Several options for education exist and could include options such as:

- The development of a comprehensive catch and release guide to be distributed to Northern Ontario anglers;
- The creation of a training program or manual to allow Northern Ontario angling guides to impart good techniques as well as conservation information to anglers;
- The development of a public awareness video that can be used by Northern Ontario lodges to inform guests of conservation practices and the benefits of conservation practices;
- Industry education on the benefits of catch and release and options and the tools available for imparting the information to their guests;
- Catch and release education that can take place in conjunction with the youth program to be developed; and
- Advocacy initiatives to suggest the development of a public awareness campaign and the inclusion of catch and release information with Ontario Fishing licenses, when mailed to anglers.

Northern Ontario Angling Product Development Committee Role:

- Work with NOTO and TNO on advocacy initiatives where support is needed.
- Support the development of a conservation education program.



APPENDIX I:

SWOTT Analysis

During the Northern Ontario Tourism Summit held in Sault Ste. Marie in November 2015, an angling tourism focus group session was held with 15 participants in attendance. Their input regarding questions posed about trends, opportunities and issues was as follows:

What is the
single biggest
shift you are
seeing?

- Quality of experience
- Fly-fishing – different angling techniques and lures
- Aging market
- Canadian market growth – domestic; increased number of women
- Increase in catch and release by both owners and visitors
- How people acquire travel information; rise of digital and social media
- Next generation not interested; how do we replace today's visitor?
- Shorter stays; more than one trip
- Consumer requiring connectivity
- Marketing online
- More families
- Lead time for booking
- Increase in guided tours
- Proximity to target markets means more families; farther away, less families
- Consumer expectations:
 - » Looking more for full packages
 - » More offerings, a more diversified experience.
 - » Sustainable tourism



What is one NEW product or experience that Northern Ontario can deliver to attract new visitors in the next 3 years?

- Packaging – multi-type products that include fishing as one component
- Ontario *Learn to Fish* program in lodges
- Offering charter flights from Chicago to Red Lake
- Kayak fishing
- Big lake fishing, charter boats
- Better online presence such as websites and social media as many operators are weak in this regard
- Develop a social media experience to connect immediately with a group once fish is caught; i.e., ‘Live Well’ – instant sharing; or ‘Fish Brain’, with multi data ability to record location, temperature of water, etc.
- Increased fly fishing offering
- Optional components – daily fly-outs/float plane ride
- Paddle board fly fishing
- More/better broadband – we lack technology, even just telephone service
- Booking online
- Workforce needs



Common Themes as noted by this group:

- Non-traditional water methods of angling – extreme fishing
- Packaging angling with other products such as canoeing, kayaking, Indigenous/ cultural components
- Basic connectivity requirements



+ STRENGTHS

- + Northern Ontario lakes and water system is vast.
- + Access to the largest reserve of fresh water in the world.
- + Established transportation mechanisms by land, water and air.
- + Vast pristine wilderness.
- + Strong health of the fisheries industry.
- + Strong regulatory system.
- + The ability to use bait to fish.
- + Northern Ontario is affordable compared to other provinces and territories.
- + The variety of fishing techniques and experiences available in Northern Ontario.

+ WEAKNESSES

- Aging private and public Infrastructure (lodges, docks, boat launches).
- Disengaged Millennials - this demographic is increasingly showing a lack of interest in angling.
- Lack of access to capital to upgrade lodges.
- Lack of operators making optimal use of social media opportunities.
- Lack of proper land use planning to facilitate angling across Northern Ontario.
- The diminishing importance of the Ontario Resource-Based Tourism Policy.⁴

⁴ http://www.mtc.gov.on.ca/en/publications/RBT_Policy.pdf







OPPORTUNITIES

- The potential for increased cooperation between Canada and the United States for ease of movement across borders (bilateral initiatives between Canada and the U.S. that will efficiently and effectively move low-risk people and goods across the border).
- For the last several years, the currency exchange rate between the low Canadian dollar to U.S. dollar has been beneficial.
- The internet can be a relatively inexpensive marketing tool.
- Ideal grounds for fly fishing and non-traditional fishing methods such as pole fishing, live lining etc.
- New and innovative crank fishing techniques to build on traditional fishing.
- Ideal natural resources offer the ability to host more catch and release fishing tournaments and special events.



THREATS

- Rising mercury levels in Northern Ontario lakes.⁵
- Increasing rise of invasive species such as Asian carp, sea lamprey, zebra mussels and round goby.⁶
- Increasing threats from blue green algae.⁷
- Lack of sufficient research of the effects of climate change on Northern Ontario fisheries.
- Proactive international destinations increasingly becoming more strategic in their planning and tourism development, posing greater competition for market shares, i.e., marlin fishing in Australia, salmon fishing in Russia.



TRENDS

- Most Canadian anglers in Northern Ontario live nearby.
- American anglers tend to live in nearby northern states.
- Americans stay more nights and spend more in Northern Ontario than Canadians.
- Two key demographic characteristics of Northern Ontario's anglers are worthy of special attention:
 - » tend to be older; and
 - » do not bring children or teenagers on their trips.
- Studies in the U.S. and Canada support findings of a declining fishing market.
- Getting urbanites to fish poses a challenge but as more and more North Americans live in big cities, it is a challenge that can't be ignored.

⁵ <https://www.utoronto.ca/news/rising-mercury-levels-ontario-fish-could-have-severe-health-economic-consequences>

⁶ <http://www.invadingspecies.com/invaders/>

⁷ <https://www.ontario.ca/page/blue-green-algae>

⁸ From Tourism Northern Ontario's Anglers in Northern Ontario (RTO 13): A Situational Analysis

APPENDIX II:

Purpose of the Angling Product Development Committee

Members of the Angling Product Development Committee were selected based on their experience in angling tourism development in Northern Ontario, their overall understanding of tourism in the region and its unique natural, cultural and heritage attractions, their knowledge of relevant policies and regulations and their track record in tourism product development. Additionally, the committee members play an ongoing role in advising TNO on the best avenues for focused community engagement and communication of critical information.

The team aids and advises TNO on the enhancement and development of angling products in Northern Ontario, drawing on their knowledge, the available research and the recommendations outlined in the Northern Ontario Tourism Product Development Strategy. TNO capitalizes on members' knowledge of angling as a primary tourism product in Northern Ontario and utilizes their feedback and advice to action this product niche.



Role of the Angling Product Development Committee

Team members use their wisdom, coupled with research, to support work undertaken by TNO with the purpose of attracting more visitors to fish in Northern Ontario with the main objectives of offering a world class experience, resulting in tourists staying longer and spending more money.

They will also encourage activities that support the development of angling products that are complimentary and coordinate well with other product niches in a sustainable way.



Angling Product Development Committee Members

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|------------------------|---|--------------|---------------------------------|
| Laurie Marcil | Nature and Outdoor Tourism Ontario | 705-472-5552 | laurie@noto.net |
| Angelo Viola | Fish 'n Canada Radio/TV | 905-571-3223 | angelo@fishncanada.com |
| Betty McGie | Watson's Kaby Lodge | 705-856-2223 | betty.watsons@fishthefinest.com |
| Brenda Baughman | Bow Narrows Camp | 807-475-7246 | fish@bownarrows.com |
| Carol Caputo | Algoma Kinniwabi Travel Association | 705-254-4293 | carol@algomacountry.com |
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| Sue Crane | Crane's Lochaven Wilderness Lodge | 705-898-2222 | lochaven@vianet.on.ca |
| Ted Putnam | Hawk Lake Lodge | 617-820-4056 | ted@hawk-lake.com |



RESOURCES:

American Sport Fishing Association:

asafishing.org/facts-figures/angler-participation/u-s-angler-polulation/

Anglers in Northern Ontario – A Situational Analysis: tourismnorthernontario.com/wp-content/uploads/2016/07/rto13_anglers_summary_june_18_2015.pdf

Anglers in Northern Ontario – High Yield Anglers: tourismnorthernontario.com/wp-content/uploads/2016/07/rto13_anglers_summary_june_18_2015.pdf

Australia - Charter Boat Fishing: sustain.pata.org/wp-content/uploads/2014/12/gartside5.pdf

Blue-Green Algae in Ontario: www.ontario.ca/page/blue-green-algae

Bring Back the Salmon Program: www.bringbackthesalmon.ca/classroom-hatchery-program/

Invasive Species in Ontario: www.invadingspecies.com/invaders/

Manitoba Master Angler Program: anglers.travelmanitoba.com/

Mercury Levels in Ontario: www.utoronto.ca/news/rising-mercury-levels-ontario-fish-could-have-severe-health-economic-consequences

MNR Fish Online: www.gisapplication.lrc.gov.on.ca/FishONLine/Index.html?site=FishONLine&viewer=FishONLine&locale=en-US

National Archery in the School Program: www.ofah.org/programs/national-archery-in-the-schools-program-nasp/

National Fishing in Schools Program: www.flyfishinginschools.org/

North Algoma Operator Study: helabourmarketgroup.ca/wp-content/uploads/2015/08/13BC-LMI-Report-Final.pdf

Ontario Angler Awards: www.ontarioanglerawards.com/how-the-program-works/

Ontario Fish Strategy – Fish for the Future: apps.mnr.gov.on.ca/public/files/er/ontarios-provincial-fish-strategy.pdf

Ontario Parks: Learn to fish learn to camp program - MNR

Ontario Resource-Based Tourism Policy: www.mtc.gov.on.ca/en/publications/RBT_Policy.pdf

St. Lucia – Caribbean Fish Fries: www.slucia.com/visions/fishfry.html

United States – Recreational Fishing as Tourism: www.csu.edu/cerc/documents/RecreationalFishingasTourism.pdf



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