ANGLERS IN NORTHERN ONTARIO

A SITUATION ANALYSIS

PREPARED FOR

TOURISM NORTHERN ONTARIO

BY

Research Resolutions & Consulting Ltd.

Ontario

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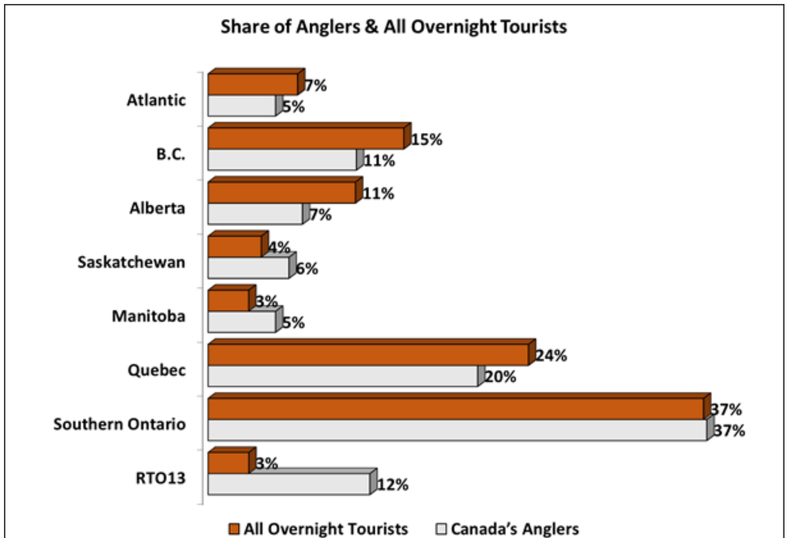
EXECUTIVE SUMMARY

MARKET SHARE & ORIGIN

Northern Ontario attracts anglers at four times the rate it attracts all overnight tourists.[1]

Fishing is a major tourism activity for many parts of Canada but nowhere more so than in Northern Ontario. Over the course of a year, Canada attracted 8.1 million overnight tourists from Canada, U.S. and overseas countries who went fishing on their trip. About 1.0 million of these tourists went to Northern Ontario (12%) even though the region captures only about three per cent of *all* overnight tourists across the country.



Source: Special Tabulations, TSRC 2012/2013 Pooled/ITS US/OVS 2012 prepared by Research Resolutions.

Within the province, Northern Ontario also attracts anglers at three times the rate that it attracts overnight tourist as a whole.

Ontario's North accounts for 1-in-12 of all overnight tourists in the province (8%) but attracts one quarter of all anglers on overnight trips in Ontario (25%). The region captures an even larger share of anglers in Ontario who rely on paid, roofed lodging during their trip (*high yield*), accounting for 50% of these overnight tourists.

There are more Canadians than Americans fishing in Northern Ontario but the high yield market is dominated by Americans.

Like tourists in Canada generally, most anglers in Northern Ontario are Canadians. Of the 970,000 overnight tourists who went fishing in Northern Ontario, 587,000 or 6-in-10 are Canadians. Among the North's 389,000 *high yield* anglers, however, Americans outpace Canadians at 2-to-1. Two thirds of Northern Ontario anglers who rely on paid roofed lodging are Americans (262,000) compared to one third who are Canadians (126,000).

On the surface, it would seem that efforts should be made to convince Canadian anglers to use paid roofed lodging instead of campgrounds or private homes/cottages for their accommodation to increase their contribution to revenues in the North. Given the reality that

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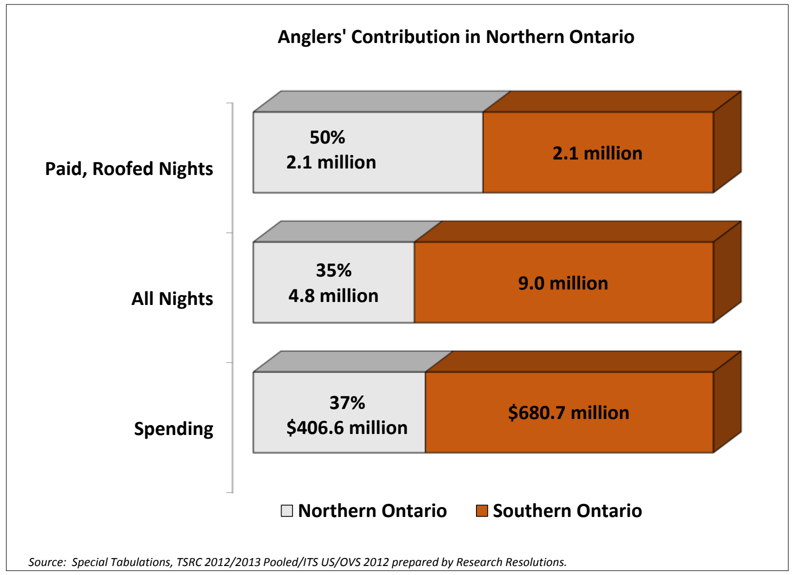
[1] All figures in the summary and report are based on Statistics Canada microdata which contain anonymised data collected in the Travel Survey of Residents of Canada 2012/2013 (pooled) and/or the International Travel Survey 2012. All computations on these microdata were prepared by Research Resolutions and Consulting Ltd. on behalf of Tourism Northern Ontario and the responsibility for the use and interpretation of these data is entirely that of the author(s).

many of these Canadians have private cottages, friends or relatives who billet them and a propensity to camp, efforts to change their lodging choice will likely be very challenging.

Anglers account for more than one third of all overnight tourism spending and nights in Northern Ontario and one half of all nights spent in the region's paid, roofed lodging.

Clearly, anglers are a mainstay of tourism's economic contribution to Northern Ontario. They account for 37% of the $1.0 billion spent on touristic goods and services and about the same proportion of the 13.8 million nights spent in the region, irrespective of the type of lodging used. Most notably, however, anglers represent one half of the 4.2 million **paid roofed lodging nights** in the North over the year.



Most Canadian anglers in Northern Ontario live nearby.

Canadians who fish in Northern Ontario are about equally divided between those who live in the North (27%) and in other parts of Ontario (23%). A further ten per cent reside in neighbouring Manitoba. Not too surprisingly, most Northern Ontario residents do *not* rely on paid roofed lodging for their fishing trips, choosing instead to camp, stay with friends or in their private cottages.

Northern Ontario Anglers by Place of Residence

	Total		Paid Roofed Lodging		No Paid Roofed Lodging	
	#	%	#	%	#	%
RTO13's Anglers	970,000	100%	389,000	100%	582,000	100%
Canada	**587,000**	**61%**	**126,000**	**32%**	**461,000**	**79%**
RTO13 Residents	258,000	27%	16,000	4%	241,000	41%
Southern Ontario	220,000	23%	94,000	24%	127,000	22%
Toronto CMA	58,000	6%	28,000	7%	30,000	5%
Manitoba	94,000	10%	13,000	3%	82,000	14%
U.S.A.	**381,000**	**39%**	**262,000**	**68%**	**119,000**	**20%**
Minnesota	117,000	12%	68,000	18%	49,000	8%
Wisconsin	50,000	5%	28,000	7%	23,000	4%
Michigan	34,000	4%	23,000	6%	11,000	2%
Illinois	31,000	3%	26,000	7%	6,000	1%
Other states	148,000	15%	118,000	30%	30,000	5%
Overseas	**3,000**	*	*	*	*	*

*Special Tabulations, TSRC 2012/2013 Pooled/ITS US/OVS 2012 prepared by Research Resolutions. *Less than 0.5%.*

American anglers also tend to live nearby.

They are concentrated in adjacent states including Minnesota, Wisconsin, Michigan and Illinois. These markets are especially important to the high yield angler segment, representing almost two fifths of all Northern Ontario anglers who utilize commercial roofed lodging on their trips.

LENGTH OF TRIP & LODGING

Americans spend more nights on their fishing trips in Northern Ontario than do Canadians.

On average, a Canadian angler spends about four nights on the Northern Ontario fishing trip whereas an American spends almost seven nights. Thus, at 2.5 million of approximately 4.8 million nights spent in Northern Ontario by anglers, the American market contributes over half (53%). Its dominance, is however, especially evident in utilization of commercial lodging facilities (see below). [2]

Commercial cottages are very popular among Northern Ontario's American anglers.

Approximately two million nights were spent by anglers in Northern Ontario's commercial cottages, fishing lodges/camps, hotels and motels over the year. Of these, three quarters are spent by Americans (1.6 million, 75%). Clearly, commercial cottages are Americans' lodging of choice – they spent 1.4 million nights in these properties in Northern Ontario.

Of the half million nights spent by anglers in Northern Ontario's **campgrounds**, somewhat more were spent by Canadians (324,000) than by Americans (231,000).

SPENDING IN NORTHERN ONTARIO

At $406.6 million, anglers in Northern Ontario contributed two fifths of the $1.1 billion spent by *all* overnight tourists in the North.

This $406.6 million represents over one third of all angler spending in the province over a year. Of this amount, $278.8 million was spent by those using paid roofed lodging and $127.8 million was spent by anglers staying in campgrounds or private lodging.

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[2] The questionnaires for Statistics Canada's US and Canadian travel surveys provide different lodging choices for survey respondents. Furthermore, respondents self-identify their lodging type from an available list that does not provide descriptions to aid in differentiating a "lodge" from a "resort" or "commercial cottage/cabin". This analysis can only provide information *as reported*, recognizing that consumer responses may not match industry definitions of lodging types.

American anglers account for almost two thirds of *all* spending by those who fish in the North ($258.0 million, 64%) and three quarters of the $278.8 million spent by those who rely on roofed commercial lodging while on their fishing trip ($217.1 million, 78%).

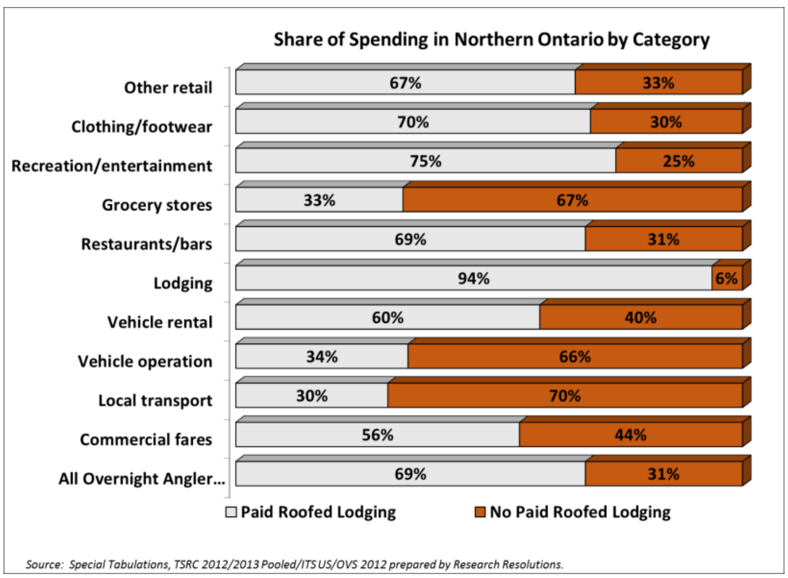
Northern Ontario Anglers' Spending by Place of Residence

	Total	Any Paid Roofed Nights	No Paid Roofed Nights
Total	$406.6 million	$278.8 million	$127.8 million
Canada	36%	22%	66%
Ontario residents	30%	19%	55%
Other Canadians	6%	3%	11%
U.S.A.	64%	78%	32%
Overseas	1%	0%	2%

Special Tabulations, TSRC 2012/2013 Pooled/ITS US/OVS 2012 prepared by Research Resolutions.

Every sector of the tourism economy benefits from anglers in Northern Ontario but the share of spending by category differs somewhat between those who do and do not use paid roofed lodging.

For example, two thirds of the $61.5 million on vehicle operation are made by anglers who do **not** use paid roofed lodging even though total spending for this group represents only one third of all spending by overnight anglers. Similarly, grocery stores benefit more from these anglers (67%) than such stores do from anglers relying on paid roofed lodging (33%).



Conversely, Northern Ontario's restaurants are twice as likely to get patronage from people staying in hotels, lodges, resorts and the like (69%) than those who are camping or in private homes where they have cooking facilities (31%).

Differences in length of stay and lodging choices result in different yields for American and Canadian anglers in Northern Ontario.

When compared to the corresponding Canadians, the importance of American anglers is amply evident: at $258.0 million, American anglers bring 76% *more* spending to Northern Ontario than do their Canadian counterparts ($146.4 million).

The differences are especially dramatic within the segment of the market that relies on paid, roofed lodging: Americans in the segment generate 253% *more* tourism revenue for Northern Ontario ($217.1 million) than do Canadians ($61.5 million).

$127.8 million in tourist spending is hardly *chump change.*

Clearly the high yield angler on an overnight trip in Northern Ontario brings more revenue to the region ($278.8 million) than does the angler who camps, stays in a private cottage or with friends/relatives ($127.8 million). At the same time, many tourism businesses throughout Northern Ontario would suffer without the $127.8 million in revenue these *other* anglers bring them. Promotional campaigns and services that take these *other anglers* into account will help insure that the millions they spend continue to benefit Northern Ontario.

Visitor Spending in Northern Ontario – Americans & Canadians

	Americans	Canadians	% Difference in Favour of Americans
Visitor Spending – All Anglers	$258,000,000	$146,400,000	76%
Paid Roofed Lodging	$217,100,000	$61,500,000	253%
No Paid Roofed Lodging	$40,900,000	$84,900,000	-52%

Special Tabulations, TSRC 2012/2013 Pooled; ITS US 2012 prepared by Research Resolutions.

ECONOMIC IMPACT

Anglers in Northern Ontario make a substantial contribution to the economic wellbeing of the North and the province as a whole.[3]

Northern Ontario anglers contributed $294.9 million toward Ontario's gross domestic product (GDP). Across the province, approximately 4,745 jobs and $189.2 million in wages were generated as a result of their spending in the North.

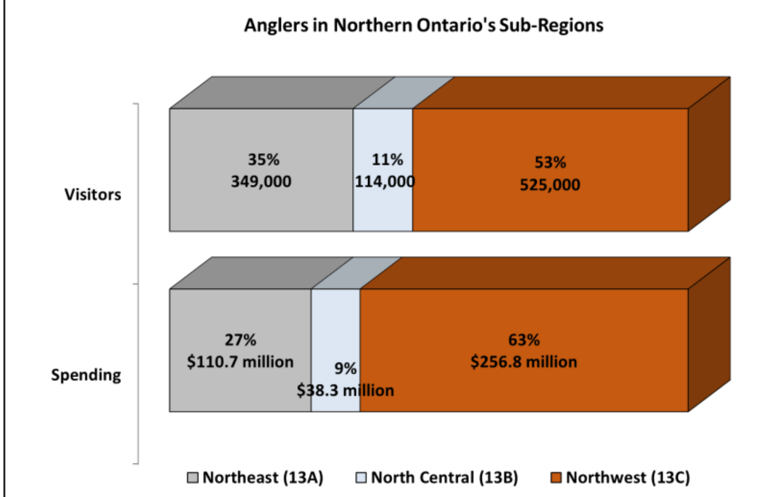
At $136.1 million in taxes province-wide, all levels of government benefited from spending by Northern Ontario anglers. Of the $136.1 million, approximately $74.1 million were federal government taxes, a further $61.2 million were provincial taxes and $775,000 were municipal taxes.

More than 90% of the economic benefits generated in Ontario by Northern Ontario's anglers were retained *within* the region.

[3] Estimates of economic impact are based on MTCS's TREIM model. Figures include direct, indirect and induced impacts.

ANGLERS IN NORTHERN ONTARIO'S SUB-REGIONS

Fishing contributes to tourism activity in each Northern Ontario sub-region but is most prominent in Northwest Ontario.



Source: Special Tabulations, TSRC 2012/2013 Pooled/ITS US/OVS 2012 prepared by Research Resolutions.

Northwest Ontario (13C) is a destination for about one third of *all* overnight tourists in Northern Ontario but is substantially more popular among anglers. This sub-region attracts the largest share of anglers, at about one half million (53%).

The attractiveness of Northwest Ontario for anglers is driven, at least in part by its common border with key U.S.A. markets including Minnesota and Wisconsin.

In contrast, Northeast Ontario (13A) captures about half of *all* overnight tourists to the North but only about one third of Northern Ontario's anglers (349,000, 35%). Similarly, North Central (13B) is a destination for a larger share of *all* overnight tourists in Northern Ontario (18%) than of anglers on overnight trips in the region (114,000, 11%).

The spending pattern across the three sub-regions closely resembles the volume of tourists each captures. With its particularly high concentration of anglers, Northwest Ontario attracts about $256.8 million in tourism spending from these tourists, or almost two thirds of all spending by overnight anglers in the North (63%).

Northeast Ontario captures about $110.7 million or over one quarter of the anglers' spending throughout Northern Ontario. About one tenth of Northern Ontario's angler spending takes place in North Central ($38.3 million).

SOME DEMOGRAPHICS WORTH WATCHING

Two key demographic characteristics of Northern Ontario's anglers are worthy of special attention: they tend to be older and they do not bring children or teenagers on their trips.

The domestic angling market is somewhat younger than the corresponding American market, averaging 45 years and 52 years, respectively. In both countries, the segment relying on paid roofed lodging is somewhat older than anglers as a whole (Canadians, 48 years; Americans, 54 years). Furthermore, most Canadians (78%) and even more Americans (90%) are travelling in relatively small groups that do **not** include children or teenagers.

Taken together, these characteristics suggest an aging market with a low replacement prognosis since studies show that more than four fifths of "current" anglers went fishing while children and many attribute their participation in the sport to exposure as children. As discussed in the following section (*Observations*), efforts at recruitment and retention are likely to be critical to the well-being of sport fishing in Northern Ontario.

OBSERVATIONS[4]

As noted in our previous report on High Yield Anglers, Canadian <u>and</u> American anglers are important to the health of Northern Ontario's tourism industry.

The Canadian segment, almost exclusively comprised of Ontario residents, makes a substantial contribution to the health of gas stations, restaurants, retail and recreational enterprises even if comparatively few of these anglers rely on paid roofed lodging for their Northern Ontario visit. Keeping the general *tourism plant* healthy not only enhances anglers' experiences but also contributes to the ability of the region to meet the needs of *other* tourists.

Studies in the U.S. and Canada support findings of a declining fishing market.[5]

From a high of almost 50.0 million Americans doing fresh water fishing primarily near home and, less commonly, on overnight trips in 2007, the market fell to 37.8 million by 2013. Fisheries and Oceans Canada also reports a decline in sport fishing among Canadians. Explanations for the decline in both countries include increased urbanization, increased immigration, the lower take-up rate of fishing among immigrant groups, and aging of the population.

The sustainability of fishing operators in Northern Ontario is strongly tied to the health of the U.S.A. market – one that is aging and shrinking.

The aging pattern among anglers in Northern Ontario is evident across North America, leading to concerns about an ever-shrinking market – unless proactive steps are taken to bring new people into the sport.

Examples of such proactive steps include *license free family fishing programs* promoted by a consortium of Canadian governments, associations and fishing gear manufacturers. Such programs are designed to give Ontario youngsters fishing experience. Programs such as this

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[4] The observations offered are those of the author and are provided to generate discussion among Northern Ontario Tourism's staff and tourism operators throughout the region.

[5] *Survey of Recreational Fishing in Canada 2010*, Department of Fisheries and Oceans Canada; *Exploring Recent Increases in Hunting and Fishing Participation*, American Sportfishing Association, Responsive Management, the Oregon Department of Fish and Wildlife, and Southwick Associates, 2013

acknowledge the importance of providing fishing experiences to children so they have a better chance of being anglers as adults and could contribute to the health of the market. [6]

Getting urbanites to fish poses a tall challenge but as more and more North Americans live in big cities, it is a challenge that can't be ignored.

Various factors militate *against* fishing by urbanites. These are the very factors that affinity groups, marketing organizations and governments need to address to counter the relentless urbanization of North America: access, cultural history/traditions of new immigrants and the decline of face-to-face social camaraderie that was traditionally fostered among neighbours, friends and family that has characterized sport fishing in the past).

For urban recruitment, a province-wide *access* program may be necessary.

Northern Ontario certainly cannot assume full responsibility for recruitment and retention of anglers. Instead, province-wide programs and specifically those that encourage fishing in the ponds, lakes and rivers that run through major cities are likely to prove critical to keeping the Ontario angling market robust.

In other words, many urbanites that have not fished or have not done so in a long time might be tempted by the sport if they could start by fishing *close to home*. Thus, the development of urban fishing programs could be an important source of anglers for more distant destinations including Northern Ontario.

Growing ethnic and cultural diversity in Canada and the U.S.A. pose a challenge for market growth.

Most anglers in Ontario are multi-generational Canadians. Similarly, U.S.A. studies show that fishing is much less common among the growing Hispanic population than it is among Caucasian and multi-generational Americans. As immigrant populations increase in the province and the non-white/Hispanic populations in the U.S. continue to grow, the market with a cultural history of fishing will represent a smaller share of the potential Canadian and U.S. markets.

New immigrants on both sides of the border tend to concentrate in major urban areas. They do not necessarily have a family tradition of fishing or spending time in wilderness areas such as those offered in Northern Ontario. Again, outreach programs in these communities may entice them to the sport and to fishing destinations in Northern Ontario.

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[6] Sponsored by Ontario Federation of Anglers and Hunters, Province of Ontario, Canadian Sportfishing Industry Association, Canadian National Sportfishing Foundation, Fisheries and Oceans Canada, Lucky Strike, Shimano and Ontario Out of Doors.

The social camaraderie that commonly characterizes fishing trips among friends and/or families is more difficult to foster in large urban centres.

Social media may be the new way to connect anglers in urban areas so they can trade *fish stories* and build virtual communities. Eventually such electronic community-building could lead fishing trips to destinations in Northern Ontario among anglers who have met online. Northern Ontario Tourism Organization (NOTO) would seem to be a logical choice to create and maintain these types of social networks among anglers.

Information sharing and inter-regional partnerships focussed on retention and recruitment might prove useful.

Since all fishing destinations in North America are facing similar challenges, TNO might consider partnering with affinity groups and other marketing organizations to learn *what works best* to retain and/or grow the fresh water sport fishing market. Readers are encouraged to review some examples provided in the final chapter of this report.

Marketing and appropriate messages can help reach potential and lapsed anglers.

As important as recreational fishing is to many destinations throughout Canada, it seems odd that so little research in Canada provides guidance on marketing and messaging tools. Looking to the USA, however, there are studies that help identify the efficacy of various efforts to promote the sport and the optimal messaging to attract anglers.

- U.S state agency personnel that manage hunting and fishing participation and opportunities cite **marketing efforts** as the most efficacious in increasing resident and non-resident fresh water anglers.
- **Youth recruitment/retention programs** and, to a lesser extent, those targeting adults were commonly mentioned for having an impact on the resident market though were not seen as effective in attracting the out-of-state market.
- The ***best thing about fishing*** for men is catching fish whereas for women, it is enjoying the sounds and smells of nature and spending time with family and friends;

Some Recruitment/Retention Ideas

Recruitment

• Develop and support after school sporting clubs for youth age 8 to 18.

• Develop and support "I'm an angler/hunter" marketing campaign that targets adults from ages 18 to 44.

• Develop and support "Learn to hunt/fish" workshops and events for adults age 18-44.

• Develop and support family-oriented outdoor skills sampler events.

Retention

• Create and support a web-based clearinghouse of hunting, fishing and outdoor skills information, targeted at adults age 18-44.

• Create and support a reverse mentoring campaign targeted at maintaining the participation of adults age 45 and older.

• Create and legislatively enact a new family license that incorporates hunting, fishing, state park admittance and other privileges.

Commissioner's Council on Hunting and Angling Recruitment and Retention, 2013 (Minnesota)

- The ***worst thing about fishing*** for men and women is **not** catching any fish and for women only, baiting the hook/taking fish off hooks;

- The most commonly cited ***motivations for first time anglers*** to engage in the sport are the excitement and adventure of the experience and spending time with the family.

Readers are encouraged to explore more findings from these studies, described in the final chapter of this report.

***Rowing the boat* is not going to sustain the angling market for Northern Ontario.**

As documented in this analysis, many factors threaten the North's angling market. Aging, urbanization and immigration will exert downward pressure on the market – unless steps are taken to retain and recruit new anglers. Because these factors are continent-wide, the steps to address them should include a wide array of marketing and natural resource professionals, outfitters, affinity organizations and equipment manufacturers throughout Ontario and nearby states in the U.S.A. By acting in concert, such organizations can secure a long legacy for angling in the North. The sport is, after all, a signature Northern Ontario activity and a major economic driver.

INTRODUCTION

Northern Ontario offers some of the best fishing in North America and attracts tourists from across the continent to its lakes and rivers. It is a signature experience for the region and a core focus of Tourism Northern Ontario (TNO) and other marketing organizations throughout the North.

Because of anglers make a substantial contribution to tourism businesses and tourism revenue throughout the North, TNO commissioned Research Resolutions & Consulting Ltd.[7] to undertake a situation analysis of the angling market. This report updates and expands the scope of an earlier analysis.[8] The focus of the previous report was anglers who relied on fishing lodges, hotels, motels, commercial cottages and camps for overnight stays in Northern Ontario.

By broadening the analysis to include **all anglers on overnight trips in Northern Ontario**, the full size and tourism economic contribution of sport fishing becomes evident. For example, regardless of whether they camp, stay in a private or a commercial cottage, anglers on overnight trips in the North consume food and beverages purchased in stores and restaurants, fuel their cars and boats at gas stations and marinas, make retail purchases at area stores and pay admissions to local attractions and events.

The findings presented in this report cover **all** overnight tourists in Northern Ontario who went fishing on their trip, irrespective of the type of lodging they used in the region. The information in the previous report was based on 2010 Statistics Canada data whereas this project relies on the most current available data sources (2012/2013):

- Statistics Canada's Travel Survey of Residents of Canada (TSRC – 2012/2013 pooled) and
- Statistics Canada's International Travel Survey (ITS US/OVS 2012).

These studies capture the volume, value and characteristics of tourists across Canada. In this analysis, the focus is on those who meet the following criteria:

- **Overnight in Northern Ontario**: spent at least one night in Northern Ontario on their trip;
- **Activities on trip**: name *fishing* as an activity on the overnight trip.

Other studies and commentary associated with anglers are referenced in this situation analysis to provide tourism planners and marketers with ideas about how best to capitalize on the potential of this iconic tourism market in Northern Ontario. These studies are listed in the appendix.

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[7] Judy Rogers, President of Research Resolutions & Consulting Ltd. prepared the report. She can be reached at Research Resolutions & Consulting Ltd., 16 Hepbourne Street, Toronto ON, M6H 1J9; 416 531-9973; rogers.judy@sympatico.ca.

[8] *High Yield Anglers in RTO13: A Situation Analysis*, March 2013 prepared by Research Resolutions & Consulting Ltd.

DIMENSIONS OF THE ANGLER MARKET

MARKET SIZE AT THE CANADA LEVEL

Of the 126.6 million overnight tourists in Canada during 2013, 8.1 million (6%) claim to have done some fishing on their trip (see Table 1).

Most tourism in Canada is driven by Canadians. The domestic market accounts for almost 9-in-10 of all overnight tourists in the country over the year (88%). Similarly, Canadians account for most of the overnight tourists who go fishing on their trips (89%).

Table 1: Canada's Anglers by Place of Residence

	Total Tourists	All Anglers	Anglers Using Paid Roofed Lodging
Overnight Visitors (Total)	126.6 million	8.1 million	1.5 million
Place of Residence			
Canada	88%	89%	63%
U.S.A.	9%	10%	34%
Overseas	3%	1%	3%

Special Tabulations, TSRC 2012/2013 Pooled/ITS US/OVS 2012 prepared by Research Resolutions. Percentages may add to more than 100% due to rounding.

Americans represent about one-tenth of all of Canada's overnight tourists and the same proportion of those who fish on their trips. Visitors from overseas countries contribute a small share of all overnight tourists (3%) and an even smaller share of anglers (1%).

The angler market mix changes substantially within the portion that relies on paid roofed lodging during their stay (1.5 million). Specifically, Americans are highly over-represented among the 1.5 million anglers on overnight trips across Canada and staying in the paid roofed lodging. They represent about one tenth of Canada's overnight tourists and the same proportion of *all* anglers (10%) but about one-half million (504,000) or 34% of the paid roofed market.

While many Canadians take overnight fishing trips throughout the country, they tend to be heavily reliant on unpaid lodging such as homes of friends or relatives and private cottages. As a consequence of their lodging choices, nationwide the domestic market falls from 89% among *all Anglers* to 63%, or fewer than one million anglers using paid roofed lodging (927,000).

PROVINCIAL MARKET SHARES

Overnight tourists in virtually every region of Canada go fishing on their trips. Because of its large population and the appeal of Ontario destinations to the province's own residents, Ontario attracts more anglers than does any other province (see Table 2). During the year, 3.9 million overnight tourists in Ontario went fishing on their trip and 970,000 of these were visiting locations in Northern Ontario.

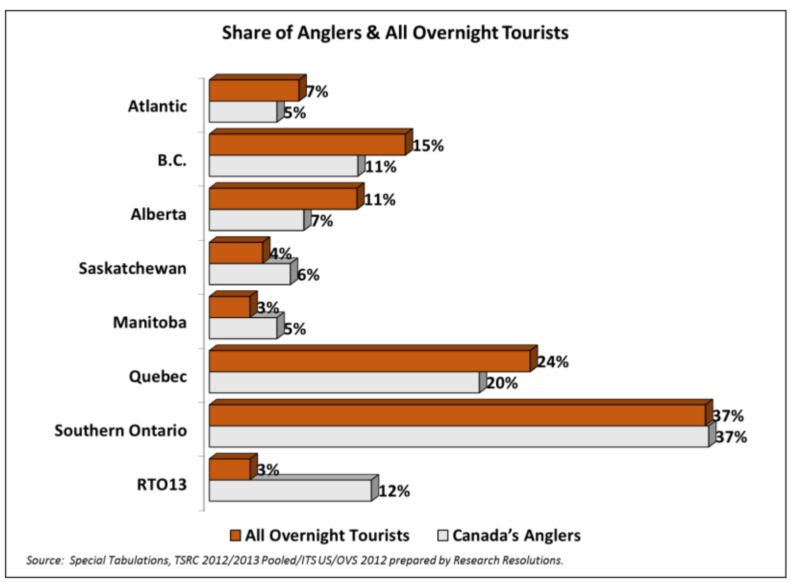
Table 2: Overnight Anglers to . . . Province

	Anglers in Canada	
Overnight Visitors	8,076,000	% of Canada's Anglers
Location(s) in Which Nights Spent		
Ontario	3,887,000	48%
RTO13	**970,000**	**12%**
Southern Ontario	2,944,000	37%
Quebec	1,645,000	20%
Manitoba	405,000	5%
Saskatchewan	468,000	6%
Alberta	525,000	7%
B.C.	883,000	11%
Atlantic	389,000	5%

Special Tabulations, TSRC 2012/2013 Pooled/ITS US/OVS 2012 prepared by Research Resolutions. Numbers/percentages add to more than total/100% because of duplication.

Similarly, the large population in Quebec combined with propensity of Quebec residents to travel within their own province yield a large overnight fishing market (1.6 million). While overnight fishing trips are less common in British Columbia (883,000) than in Ontario or Quebec, this western province attracts anglers at a substantial rate.

At one-eighth of all anglers (12%), Northern Ontario attracts tourists for this sport at an appreciably higher rate than it attracts overnight visitors in total (3%, see chart).

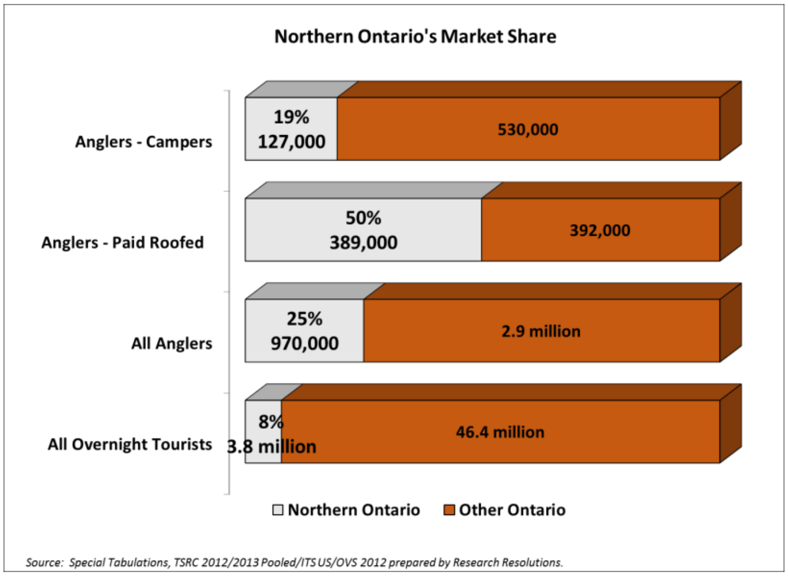


NORTHERN ONTARIO'S ANGLERS

OVERVIEW OF THE MARKET

Analogous to the national scene, Northern Ontario pulls well above its weight in attracting anglers to Ontario. The region captures one-twelfth of the province's 50.2 million overnight tourists (8%) but attracts anglers at three times this rate (25%).

Northern Ontario's ability to attract anglers who use paid roofed lodging is even more dramatic: the region is a destination for half of these overnight Ontario tourists (50%).



WHERE THEY LIVE

Most anglers visiting Northern Ontario are Canadians (61%). Fully half are Ontario residents, divided fairly evenly between those who live in Northern Ontario (27%) and those who live elsewhere in the province (23%).

Two fifths of Northern Ontario's anglers are Americans (39%), primarily from bordering states including Minnesota and Wisconsin.

Americans are central to Northern Ontario's success in attracting anglers for the region's paid roofed lodging establishments. The U.S.A. represents two thirds of this important segment or 262,000 anglers (see Table 3). A further one quarter are residents of Southern Ontario (94,000) including 28,000 who live in Toronto CMA.

Table 3: Northern Ontario's Anglers by Place of Residence

	Total		Paid Roofed Lodging		No Paid Roofed Lodging	
	#	%	#	%	#	%
RTO13's Anglers	970,000	100%	389,000	100%	582,000	100%
Canada	**587,000**	**61%**	**126,000**	**32%**	**461,000**	**79%**
RTO13 Residents	258,000	27%	16,000	4%	241,000	41%
Southern Ontario	220,000	23%	94,000	24%	127,000	22%
Toronto CMA	58,000	6%	28,000	7%	30,000	5%
U.S.A.	**381,000**	**39%**	**262,000**	**68%**	**119,000**	**20%**
Minnesota	117,000	12%	68,000	18%	49,000	8%
Wisconsin	50,000	5%	28,000	7%	23,000	4%
Michigan	34,000	4%	23,000	6%	11,000	2%
Illinois	31,000	3%	26,000	7%	6,000	1%
Other states	148,000	15%	118,000	30%	30,000	5%
Overseas	**3,000**	*	*	*	*	*

*Special Tabulations, TSRC 2012/2013 Pooled/ITS US/OVS 2012 prepared by Research Resolutions. *Less than 0.5%.*

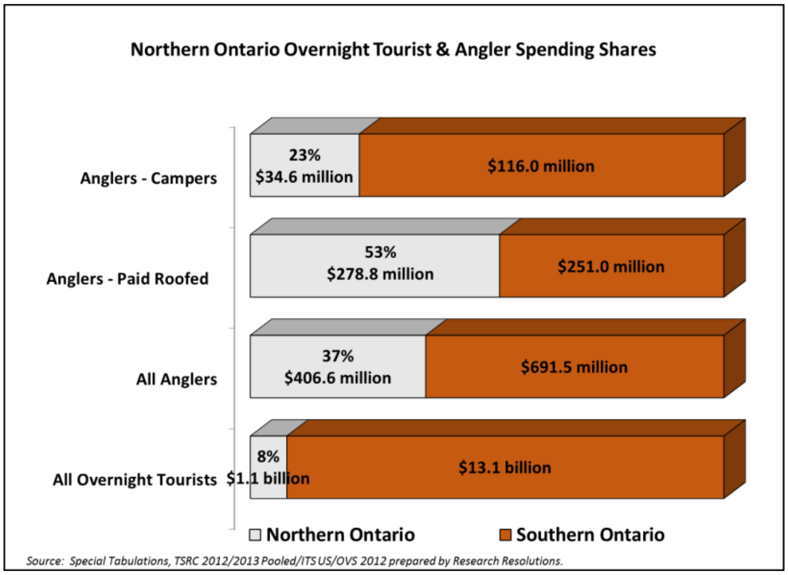
At the same time, about as many Americans go fishing in Northern Ontario and do *not* use commercial roofed lodging (119,000) as do Canadians who live in Southern Ontario (127,000).

More about American & Canadian Anglers in Northern Ontario

Market characteristics and corresponding marketing programs are quite different for the American and Canadian anglers in Northern Ontario. Hence, more detail about each of these important segments is provided in subsequent sections of this report. There readers will find trip and travel party characteristics, lodging choices and other activities engaged in while on the trip to Northern Ontario for Americans and Canadians separately.

SPENDING BY ANGLERS IN NORTHERN ONTARIO

Not only does Northern Ontario capture a disproportionately high volume of anglers relative to its share of all overnight visitors in Ontario but it also far exceeds its share of spending within this target market (see chart).



The region contributes about 1-in-12 of all dollars spent by overnight visitors to the province or $1.1 billion (8%). At $406.6 million, Northern Ontario's anglers account for almost two fifths of spending by **all** anglers in Ontario (37%). This $406.6 million also represents almost two fifths of the $1.1 billion spent by *all* overnight tourists in Northern Ontario during 2013.

Northern Ontario anglers relying on paid roofed lodging spent almost $280.0 million in the region over the year. Their spending represents half of the high yield angling market spending across the province (53% of $530.0 million) and close to three quarters of the $406.6 million spent by *all* anglers in the North (69%).

WHO SPENDS THE MOST?

Largely as a function of their reliance on paid roofed lodging, American anglers make the largest contribution to the value of anglers in Northern Ontario. At $258.0 million, Americans account for three fifths of angler spending in the North (64%). Most of these dollars are attributable to those who use paid roofed lodging ($217.1 million).

At $146.4 million (36%), Canadian anglers also make a substantial contribution to the Northern Ontario economy. Somewhat more of their spending is done by anglers who do *not* use paid roofed lodging ($84.9 million) than those who do ($61.5 million).

Table 4: Northern Ontario's Anglers Spending by Place of Residence

	Total	Any Paid Roofed Nights	No Paid Roofed Nights
Total	$406.6 million	$278.8 million	$127.8 million
Canada	36%	22%	66%
Ontario residents	30%	19%	55%
Other Canadians	6%	3%	11%
U.S.A.	63%	78%	32%
Overseas	1%	0%	2%

Special Tabulations, TSRC 2012/2013 Pooled/ITS US/OVS 2012 prepared by Research Resolutions.

SPENDING BY CATEGORY

Whether they do or do not use paid roofed lodging in Northern Ontario, anglers make substantial contributions to all types of tourism businesses in the region. In addition to the $138.7 million they spend on roofed lodging or camping facilities, their spending is concentrated on keeping their vehicles fuelled ($61.5 million), eating in restaurants ($60.3 million), entertainment and recreation pursuits ($46.6 million), buying groceries in the region's stores ($37.4 million) and clothing in Northern Ontario retail establishments ($24.4 million). They also spend $22.9 million on commercial plane, bus or boat fares.

Not surprisingly, the lodging sector is a key beneficiary of anglers who use hotels, motels, lodges and resorts during their stay. These anglers spend almost $130.0 million on lodging or almost half of the $278.8 million this high yield segment spends in total on their trips in Northern Ontario.

Table 5: Detailed Spending by Overnight Anglers in Northern Ontario

	Northern Ontario	Anglers in Northern Ontario		
	Total	**Total**	**Paid Roofed Lodging**	**No Paid Roofed Lodging**
All Overnight Tourists	$1,087,000,000	$406,600,000	$278,800,000	$127,800,000
	$	$	$	$
Commercial fares	$76,300,000	$22,900,000	$12,800,000	$10,100,000
Local transport	$6,500,000	$800,000	$200,000	$600,000
Vehicle operation	$212,800,000	$61,500,000	$20,700,000	$40,800,000
Vehicle rental	$17,100,000	$1,800,000	$1,100,000	$700,000
Lodging	$297,500,000	$138,700,000	$130,000,000	$8,700,000
Restaurants/bars	$190,800,000	$60,300,000	$41,600,000	$18,700,000
Grocery stores	$105,400,000	$37,400,000	$12,400,000	$24,900,000
Recreation/entertainment	$79,900,000	$46,600,000	$34,700,000	$11,900,000
Clothing/footwear	$79,400,000	$24,400,000	$17,000,000	$7,400,000
Other retail	$21,700,000	$12,200,000	$8,200,000	$4,100,000
	%	%	%	%
Commercial fares	7%	6%	5%	8%
Local transport	1%	*	*	*
Vehicle operation	20%	15%	7%	32%
Vehicle rental	2%	*	*	1%
Lodging	27%	34%	47%	7%
Restaurants/bars	18%	15%	15%	15%
Grocery stores	10%	9%	5%	20%
Recreation/entertainment	7%	12%	12%	9%
Clothing/footwear	7%	6%	6%	6%
Other retail	2%	3%	3%	3%

*Special Tabulations, TSRC 2012/2013 Pooled/ITS US/OVS 2012 prepared by Research Resolutions. Percentages may add to more than 100% due to rounding.*Less than 0.5%.*

As demonstrated in the table below, every sector of the tourism economy benefits from anglers in Northern Ontario but the share of spending by category differs somewhat between those who do and do not use paid roofed lodging. For example, two thirds of vehicle operation expenditures are made by anglers who do **not** use paid roofed lodging even though total spending for this group represents only one third of all spending by overnight anglers. Similarly, grocery stores benefit more from these anglers (67%) than they do from anglers relying on paid roofed lodging (33%).

Table 6: Share of All Spending by Overnight Anglers

		Paid Roofed Lodging	No Paid Roofed Lodging
All Overnight Angler Spending	$406,600,000	69%	31%
(Horizontal % of Total)			
Commercial fares	$22,900,000	56%	44%
Local transport	$800,000	30%	**70%**
Vehicle operation	$61,500,000	34%	**66%**
Vehicle rental	$1,800,000	**60%**	40%
Lodging	$138,700,000	**94%**	6%
Restaurants/bars	$60,300,000	**69%**	31%
Grocery stores	$37,400,000	33%	**67%**
Recreation/entertainment	$46,600,000	**75%**	25%
Clothing/footwear	$24,400,000	**70%**	30%
Other retail	$12,200,000	**67%**	33%

Conversely, Northern Ontario`s restaurants are twice as likely to get patronage from people staying in hotels, lodges, resorts and the like (69%) than those who are camping or in private homes where they generally have cooking facilities.

Recall that two thirds of anglers in paid roofed lodging are *Americans* while about two thirds of those camping or using private lodging are Ontario residents. Because so many anglers who use paid roofed lodging came to Northern Ontario from the USA, it is not unexpected that they spend two to three times as much at recreation and entertainment providers, clothing stores and other types of retail establishments than do Canadian anglers who tend to live nearby and/or are likely to go fishing in Northern Ontario on a more regular basis.

ECONOMIC IMPACT OF ANGLERS IN NORTHERN ONTARIO

INTRODUCTION

The money spent by anglers in Northern Ontario ripples throughout the local and provincial economies. These expenditures generate economic activity including contributions to gross domestic product (GDP); jobs in tourism-related sectors such as accommodation, transportation and food services; jobs in other sectors such as manufacturing and agriculture; and taxes.[9]

GROSS DOMESTIC PRODUCT

Gross domestic product is the value of goods and services produced by labour and capital located within a region. This definition helps explain why GDP retained in Northern Ontario is smaller than the total amount of spending done by overnight anglers in the North: many of the goods and services provided to serve tourists in Northern Ontario are produced outside the region.[10]

During the year, anglers spent about $406.6 million on tourism goods and services in Northern Ontario.[11] Once the imports from other locations in Ontario, other parts of Canada, and other countries are taken into account, tourism spending by these tourists generated about $182.4 million in direct economic activity (i.e. GDP), and an additional $94.3 million in indirect and induced GDP for Northern Ontario's economy.

Table 7: Overnight Anglers' Contributions to GDP and Funds Retained in Northern Ontario

	Amount Retained in Northern Ontario (A)	Amount Retained in Other Ontario (B)	Total Contribution to Ontario's GDP (A + B)
Direct	$182,400,000	-	$182,400,000
Indirect	$47,400,000	$10,400,000	$57,800,000
Induced	$46,900,000	$7,800,000	$54,700,000
Total GDP	**$276,700,000**	**$18,200,000**	**$294,900,000**

Source: TSRC 2012/2013 Pooled/ITS US/OVS 2012 *Special Tabulations prepared by Research Resolutions and special calculations of TREIM for RTO13 (MTCS). Figures are rounded to nearest 1,000.*

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[9] The economic impact estimates provided in this section reflect visitor spending only, that is, spending by visitors on overnight trips in Northern Ontario on which they went fishing. The estimates provided here are the most appropriate ones to use when assessing the results of marketing and promotional efforts, and the appeal of tourism products and experiences in Northern Ontario. MTCS's glossary of terms to be used in conjunction with outputs from TREIM is appended.

[10] In some geographical areas, the amount of economic activity is on par with, or less than visitor spending. Northern Ontario is one of these regions. This situation occurs when a sizeable proportion of the economic activity required to create the goods and services consumed by tourists occurs outside the community. For example, a high proportion of the food prepared in restaurants in RTO13 is grown outside the region. Consequently, much of the economic activity associated with restaurant meals purchased by tourists takes place outside Northern Ontario. Similarly, materials required for building hotels, motels and other lodging establishments are created outside RTO13 and generate economic activity in communities where the materials are produced.

[11] Spending estimates are based on the 2013 reference year for all markets.

There was, therefore, about $276.7 million in GDP retained in Northern Ontario. Other parts of Ontario benefited from about $18.2 million in GDP (direct, indirect, and induced) from anglers' spending in the region. When combined, the province-wide GDP contribution by overnight anglers in Northern Ontario reached $294.9 million.

JOBS, WAGES, AND SALARIES

Approximately 3,437 direct jobs and an additional 1,080 indirect and induced jobs in Northern Ontario were generated as a result of anglers' spending (see Table 8). These jobs include part- and full-time positions, on both annual and seasonal bases.[12] Additional employment in the province was generated because of anglers in Northern Ontario, bringing the total number of direct, indirect and induced jobs to about 4,745 across Northern Ontario and the entire province.

Over a year, Northern Ontario retained 95% of the 4,745 jobs created by its overnight anglers.[13] These jobs generated $189.2 million in wages and salaries province-wide, with 95% of this amount ($176.8 million direct, indirect, and induced) retained in Northern Ontario.

TAXES

All levels of government benefited from anglers' spending in Northern Ontario. Their spending generated $74.1 million in federal government taxes, a further $61.2 million in provincial taxes and $775,000 in municipal taxes based on incremental tourism revenue (direct, indirect, and induced) province-wide.

Northern Ontario retained $42.5 million in direct federal taxes and $43.0 million in direct provincial taxes.

ANGLERS' SHARE OF OVERNIGHT TOURISM ECONOMIC ACTIVITY

Northern Ontario's overnight anglers contributed approximately two fifths of *all* tourism economic activity across the region in 2013.

Anglers' Share of Total Tourism Economic Activity Retained in Northern Ontario

Gross Domestic Product	40%	Federal Taxes	39%
Wages	40%	Provincial Taxes	39%
Employment (Jobs)	38%	Municipal Taxes	40%

[12] Note that estimates for tourism economic impact in Northern Ontario published in MTCS's products may differ from those provided herein because the inputs used for the TREIM model are somewhat different and the online TREIM model is based on different assumptions and/or data than the one used internally by MTCS.

[13] Estimates of jobs produced by the economic impact model use the same definition as is used in Statistics Canada's Labour Force Survey. Thus, jobs generated by the model include part-time, full-time and seasonal jobs. They also include paid employees and unpaid family employees.

Table 8. Economic Impact of Anglers in RTO13

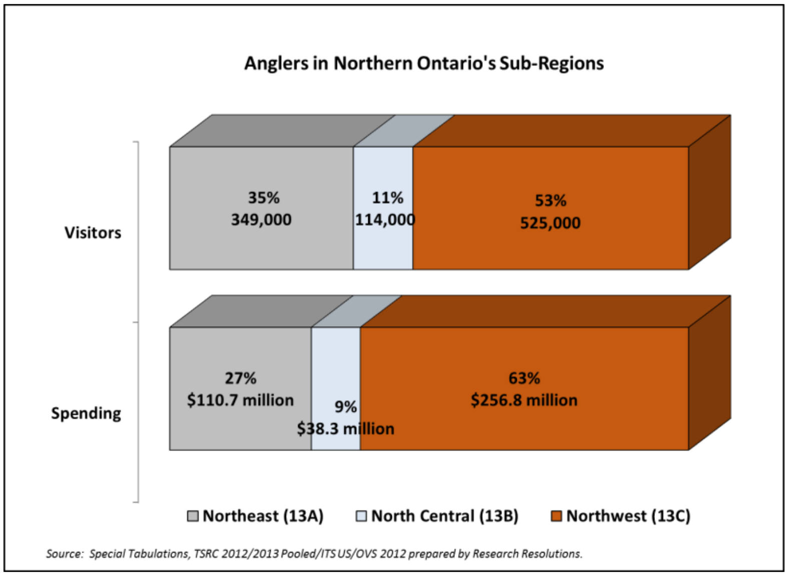
	Economic Benefits Retained in Northern Ontario	Total Benefits Across Ontario	Proportion of Total Ontario Benefits Retained in Northern Ontario
Gross Domestic Product	**$276,700,000**	**$294,900,000**	**94%**
Direct	$182,400,000	$182,400,000	100%
Indirect/Induced	$94,300,000	$112,500,000	84%
Wages	**$176,800,000**	**$189,200,000**	**93%**
Direct	$115,900,000	$115,900,000	100%
Indirect/Induced	$60,900,000	$73,300,000	83%
Employment (Jobs)	**4,517**	**4,745**	**95%**
Direct	3,437	3,437	100%
Indirect/Induced	1,080	1,308	83%
Federal Taxes	**$70,600,000**	**$74,100,000**	**95%**
Direct	$42,500,000	$42,500,000	100%
Indirect/Induced	$28,100,000	$31,600,000	89%
Provincial Taxes	**$58,400,000**	**$61,200,000**	**95%**
Direct	$43,000,000	$43,000,000	100%
Indirect/Induced	$15,400,000	$18,200,000	85%
Municipal Taxes	**$731,000**	**$775,000**	**94%**
Direct	$290,000	$290,000	100%
Indirect/Induced	$441,000	$485,000	91%

Source: TSRC 2012/2013 Pooled/ITS US/OVS 2012 *Special Tabulations prepared by Research Resolutions and special calculations of TREIM for RTO13 (MTCS). Figures are rounded to nearest 1,000.*

ANGLERS IN NORTHERN ONTARIO'S SUB-REGIONS

VOLUME & SPENDING

Northwest Ontario (13C) is a destination for about one third of *all* overnight tourists in Northern Ontario but is substantially more popular among anglers. This sub-region attracts the largest share of anglers, at about one half million (53%). The attractiveness of Northwest Ontario for anglers is driven, at least in part by its common border with key U.S.A. markets including Minnesota and Wisconsin.



In contrast, Northeast Ontario (13A) captures about half of *all* overnight tourists to the North but only about one third of Northern Ontario's anglers (349,000, 35%). Similarly, North Central (13B) is a destination for a larger share of *all* overnight tourists in Northern Ontario (18%) than of anglers on overnight trips in the region (114,000, 11%).

SPENDING IN SUB-REGIONS

The spending pattern across the three sub-regions closely resembles the volume of tourists each captures. With its particularly high concentration of anglers, Northwest Ontario attracts about $256.8 million in tourism spending from these tourists, or almost two thirds of all spending by this market segment (63%). This rate is appreciably higher than the rate at which the Northwest attracts visitor spending in Northern Ontario from overnight tourists overall (41%). Northeast Ontario captures about $110.7 million or over one quarter of the anglers' spending throughout Northern Ontario. About one tenth of Northern Ontario's angler spending takes place in North Central ($38.3 million).

Anglers are important contributors to total overnight tourist spending *within* each sub-region (see Table 9). They represent about 1-in-4 of all dollars spent by overnight tourists in Northeast and North Central but make a substantially greater contribution to the Northwest. In this sub-region, anglers contribute over half of all overnight tourist spending, with most of this deriving from anglers who utilize paid roofed lodging in Northwest. Almost all money spent by anglers using commercial roofed lodging in the sub-region was from Americans ($173.2 million of $186.7 million), reinforcing the importance of proximity to the U.S.A. market for this area and Northern Ontario as a whole.

Table 9: Angler Spending in Northern Ontario's Sub-Regions

	Northeast (13A)		North Central (13B)		Northwest (13C)	
Total Overnight Tourist Spending in Each Sub-Region	$462,500,000	%	$158,700,000	%	$446,300,000	%
Anglers – Paid Roofed	$65,000,000	14%	$24,600,000	15%	$186,700,000	42%
Anglers – No Paid Roofed	$45,700,000	10%	$13,700,000	9%	$70,100,000	16%

Special Tabulations, TSRC 2012/2013 Pooled/ITS US/OVS 2012 prepared by Research Resolutions.

CANADIAN ANGLERS IN NORTHERN ONTARIO

As noted previously, the two key markets for fishing in Northern Ontario – Canadians and Americans – differ in terms of their travel and spending patterns, lodging choices and how outfitters and DMOs in the North market to them. For these reasons, the two markets are examined in more detail in this and the subsequent chapter of this report. The following pages highlight key characteristics of the Canadian market. A corresponding section about the Americans follows.

* * * * * *

Three fifths of *all* anglers on overnight trips in Northern Ontario are Canadians. Of these 587,000 Canadians, the vast majority are Ontario residents (82%), split almost equally between those who live in the North and travel within the region to fish (44%) and those who come to the North from Southern Ontario (37%).

Of the 220,000 Southern Ontario residents who come north to fish, 58,000 are residents of Toronto. At 94,000, Northern Ontario's western neighbour – Manitoba – contributed most of the domestic anglers from outside Ontario. Winnipeg is the primary source of these Manitobans (77,000).

Most Canadian anglers in the North do *not* use paid roofed lodging on their trip. Of the 126,000 who *do* rely on Northern Ontario's hotels, motels, fishing lodges and resorts for accommodation, almost 9-in-10 are Ontario residents, typically living in the southern portion of the province (94,000) and most particularly Toronto (28,000).

Table 10: Northern Ontario's Canadian Anglers by Place of Residence

	Total		Paid Roofed Lodging		No Paid Roofed Lodging	
	Number	**Per cent**	**Number**	**Per cent**	**Number**	**Per cent**
Northern Ontario Anglers	970,000	100%	389,000	100%	582,000	100%
Canadians	587,000	61%	126,000	32%	461,000	79%
	100%		100%		100%	
Ontario Residents	478,000	82%	110,000	88%	368,000	80%
Northern Ontario	258,000	44%	16,000	13%	241,000	52%
Northeast (13A)	125,000	21%	4,000	4%	121,000	26%
North Central (13B)	44,000	8%	5,000	4%	39,000	8%
Northwest (13C)	89,000	15`%	7,000	6%	82,000	18%
Southern Ontario	220,000	37%	94,000	75%	127,000	28%
Toronto CMA	58,000	10%	28,000	22%	30,000	7%
Manitoba	94,000	16%	13,000	10%	82,000	18%
Winnipeg CMA	77,000	13%	8,000	7%	69,000	15%
Other Canada	15,000	3%	3,000	2%	11,000	2%

Special Tabulations, TSRC 2012/2013 Pooled prepared by Research Resolutions. Numbers/percentages add to more than total/100% because of duplication.

TRIP PURPOSE, PARTY COMPOSITION, LENGTH OF STAY

For the most part, fishing trips in Northern Ontario are *pleasure* trips for Canadian anglers (78%). Because so much of the domestic angling market is Ontario-based, it is not surprising that about one fifth go fishing while on a trip taken in order to visit with friends and relatives in the North (21%).

The relatively few Canadian anglers using paid roofed lodging in Northern Ontario are also typically on pleasure trips (83%) though some travel in the North to see friends and relatives (16%).

The angler's travel party tends to include two adults from the household. These individuals will spend about four nights in Northern Ontario on their trip. This profile is equally characteristic of *all* domestic anglers and the segment that relies on paid, roofed lodging.

The absence of children and/or teenagers in most angler travel parties should be a cause for concern because studies suggest that if people are not introduced to fishing as children, they are not inclined to take up the sport as adults. For more discussion of market retention and growth options, see the final chapter of this report (*Learning from Others*).

Table 11: Canadian Anglers Trip Profile

	Canadian Anglers in Northern Ontario	
Overnight Visitors	**Total**	**Nights in Paid Roofed Lodging**
Location(s) in Which Nights Spent	(587,000)	(126,000)
Trip Purpose		
Pleasure	78%	83%
Visit Friends/Relatives	21%	16%
Party Composition		
Adults Only	78%	82%
With Children/Teens	22%	18%
Average Party Size	1.8	1.7
Length of Stay in Location		
Average Length of Stay	3.9 nights	4.2 nights

Special Tabulations, TSRC 2012/2013 Pooled prepared by Research Resolutions. Numbers/percentages add to more than total/100% because of duplication.

AGE & GENDER

Canadian anglers in Northern Ontario are more likely to be men than women but the predominance of men is more pronounced among Canadians who rely on the North's paid roofed lodging sector. In this segment, 7-in-10 anglers are men compared to about 6-in-10 for the domestic market overall.

Younger people – those between 18 and 24 years – are very uncommon among Northern Ontario's anglers as a whole (11%) and especially among those who utilize paid, roofed lodging (1%). In fact, almost two thirds of this market segment are 45 years of age or older(64%), averaging 48.4 years compared to half of *all* anglers in the 45+ age group, averaging 45.0 years.

Table 12: Canadian Anglers Trip Profile - Age & Gender

	Canadian Anglers in Northern Ontario	
Overnight Visitors	**Total**	**Nights in Paid Roofed Lodging**
Location(s) in Which Nights Spent	(587,000)	(126,000)
Gender of respondent		
Male	62%	71%
Female	38%	29%
Age of respondent		
18 - 24	11%	1%
25 - 44	39%	35%
45 – 64	40%	56%
65+	10%	8%
Average Age (18+)	45.0 years	48.4 years

Special Tabulations, TSRC 2012/2013 Pooled prepared by Research Resolutions. Numbers/percentages add to more than total/100% because of duplication.

LODGING NIGHTS

Of the 2.3 million nights spent by Canadian anglers in Northern Ontario, about 2-in-10 were in paid roofed lodging, about 1-in-7 were spent in campgrounds and the majority – 6-in-10 were spent in private lodging.

Commercial cottages are the most popular form of paid roofed lodging for Canadian anglers. Rental cottages account for 15% of all nights spent by these anglers and two thirds (66%) of the 524,000 nights Canadian anglers spent in Northern Ontario's paid roofed lodging establishments. A further 72,000 nights were spent in commercial fishing lodges/camps and about the same number were in the region's motels, hotels and resorts (combined).

These anglers spend nights in the region's campgrounds (324,000, 14%) at about the same rate as they rely on commercial cottages. *Private cottages* are, however, the most widely used form of lodging in the North. The private cottage accounts for more than one third of all nights spent by anglers in the region (843,000 nights; 37%). Private homes are also widely used, accounting for one fifth of all nights (438,000).

Table 13: Canadian Anglers Trip Profile - Lodging Nights

	Canadian Anglers in Northern Ontario	
Overnight Visitors	**Nights in Northern Ontario**	
Total Person Nights	**2,274,000**	
	#	%
Paid, Roofed Lodging (All Types)	**524,000**	**23%**
Commercial cottage	347,000	15%
Motel	31,000	1%
Hotel	23,000	1%
Fishing lodge/camp/ outpost	72,000	3%
Resort	28,000	1%
Campground	**324,000**	**14%**
Private Lodging (Total)	**1,427,000**	**63%**
Private home	438,000	19%
Private cottage	843,000	37%
Private hunting/fishing lodge/camp	59,000	3%

Special Tabulations, TSRC 2012/2013 Pooled prepared by Research Resolutions. Numbers/percentages add to more than total/100% because of duplication.

OTHER ACTIVITIES ON THE FISHING TRIP

Not surprisingly, anglers are drawn to outdoor activities on their trip. Of those covered in the survey, boating (including canoeing/ kayaking) is the most popular, followed by camping, hiking and going to a beach. Wildlife or bird watching is also relatively popular among Northern Ontario's anglers.

These domestic anglers seem highly focussed on *fishing* and boating. Less than one tenth of them engage in any cultural or entertainment activity during their stay in the North. In part, their low level of attendance at historic sites (7%), festivals (4%), museums (3%) or cultural performances (2%) may be a function of their short trips. During their four night trip, there may not be time to go fishing and participate in non-outdoor activities.

Participation in various activities by Canadian anglers who use paid roofed lodging in the North follows a pattern almost identical to that of the domestic market as a whole.

Table 14: Canadian Anglers: Activities on the Trip

	Canadian Anglers in Northern Ontario	
Overnight Visitors	**Total**	**Nights in Paid Roofed Lodging**
	(587,000)	(126,000)
Outdoor Activities		
Boating/canoeing/kayaking (Net)	69%	62%
Boating	64%	56%
Canoeing or kayaking	23%	16%
Camping	42%	27%
Hiking or backpacking	34%	32%
Beach	33%	29%
Wildlife viewing or bird watching	23%	22%
National, provincial or nature park	11%	6%
Cycling	6%	4%
Hunting	6%	7%
Golfing	4%	4%
Other Activities		
Historic site	7%	6%
Team sports (participant)	5%	6%
Festival or fair	4%	1%
Sports event as a spectator	3%	1%
Museum or art gallery	3%	5%
Performance (e.g., play or concert)	2%	4%
Aboriginal event	2%	3%
Theme or amusement park	1%	1%

Special Tabulations, TSRC 2012/2013 Pooled prepared by Research Resolutions. Numbers/percentages add to more than total/100% because of duplication.

SPENDING ON THE CANADIAN ANGLER TRIP

Irrespective of their lodging choices, Canadian anglers in Northern Ontario spent $146.4 million on their trips over the year. Of this amount, two fifths or $61.5 million were spent by those using paid, roofed lodging in the region (42%). The remaining $84.9 million were spent by Canadians who went fishing but stayed with friends and relatives, in their own cottages or at campgrounds.

Each trip brings $350.00, on average, to the region for a trip of about 3.9 nights. Not surprisingly, the per trip spend increases substantially among anglers using paid roofed accommodation ($650.00) and experiences a corresponding decrease in the market segment that uses other forms of lodging in Northern Ontario ($260.00). There is a clear benefit of getting Canadian anglers to use paid roofed lodging in the North – those who contribute 60% *more* to the North's tourism revenues than those who do not.

Canadians fishing in Northern Ontario on overnight trips spend about $93.00 *per night.* Similar to their spending on the entire trip, anglers using paid roofed lodging spend $140.00 per night – about twice as much as their counterparts who use other types of lodging ($70.00).

On the surface, it would seem that efforts should be made to convince Canadian anglers to use paid roofed lodging instead of campgrounds or private homes/cottages for their accommodation to increase their contribution to revenues in the North. Given the reality that many of these Canadians have private cottages, friends or relatives who billet them and a propensity to camp, efforts to change their lodging choice will likely be very challenging.

Table 15: Canadian Angler Spending in Northern Ontario

Visitor Spending – All Anglers	$146,400,000
Paid Roofed Lodging Anglers	$61,500,000
No Paid Roofed Lodging Anglers	$84,900,000
Paid Roofed Lodging Anglers' Share of All Angler Spending	**42%**
Average Per Trip (All)	$350.00
Paid Roofed Lodging Anglers	$650.00
No Paid Roofed Lodging Anglers	$260.00
% Benefit of Paid, Roofed Lodging	**60%**
Average Per Party Per Night	$93.00
Paid Roofed Lodging Anglers	$140.00
No Paid Roofed Lodging Anglers	$70.00
% Benefit of Paid, Roofed Lodging	**49%**

Special Tabulations, TSRC 2012/2013 Pooled prepared by Research Resolutions. Numbers/percentages add to more than total/100% because of duplication.

AMERICAN ANGLERS IN NORTHERN ONTARIO

MARKET SIZE

Approximately seven per cent of the 11.8 million Americans who made overnight trips to Canada went fishing, generating a market of over 800,000 anglers for the country. While Northern Ontario is a destination for only 1-in-20 (5%) American overnight tourists nationally, it is Canada's leading destination for American anglers, capturing almost half (381,000, 47%) of the 812,000 overnight trips Americans made in 2012 on which they went fishing in Canada.

The region is equally dominant in the angler market that relies on paid, roofed lodging. Of the 504,000 American anglers in this segment nationwide, Northern Ontario is a destination for half (264,000).

From a different perspective, the 381,000 American anglers on overnight trips in Northern Ontario represent three fifths of *all* American overnight tourists in the North (622,000). In turn, anglers who rely on paid roofed lodging in the region (264,000) represent two fifths of the entire American overnight market for Northern Ontario.

Table 16: American Tourist/Angler Market Shares

	All U.S. Tourists		**All Anglers**		**Paid Roofed Anglers**	
U.S. Overnight Tourists	11,800,000		812,000		504,000	
Locations Visited Overnight	#	%	#	%	#	%
Northern Ontario	**622,000**	**5%**	**381,000**	**47%**	**264,000**	**53%**
Southern Ontario	5,300,000	45%	230,000	29%	122,000	24%
Quebec	1,800,000	15%	46,000	6%	36,000	7%
Manitoba	200,000	2%	45,000	6%	31,000	6%
Saskatchewan	147,000	1%	15,000	2%	10,000	2%

Special Tabulations, ITS US 2012 prepared by Research Resolutions. Numbers/percentages add to more than total/100% because of duplication.

WHERE NORTHERN ONTARIO'S AMERICAN ANGLERS LIVE

Most Americans who go fishing in Northern Ontario live in bordering states. By far, Minnesota is the largest single market for U.S.A. anglers, contributing almost one third of the Americans coming to Northern Ontario and going fishing (31%). Wisconsin sends about 1-in-8 anglers to Northern Ontario while Michigan and Illinois account for about 1-in-10 each. Smaller numbers of Americans come from other central U.S.A. states including Iowa, Ohio and Indiana.

Between them, Minnesota and Wisconsin anglers represent more than one third of all American anglers who rely on paid roofed lodging in the North. In each state, use the region's commercial cottages, lodges, hotels and motels occurs at about the same rate as the state residents' share of the US angling market. For example, 31% of all American anglers are Minnesotans and 26% of those using paid roofed lodging live in Minnesota.

Table 17: American Anglers in Northern Ontario - State

	American Anglers in Northern Ontario	
Overnight Visitors	**Total**	**Nights in Paid Roofed Lodging**
Location(s) in Which Nights Spent	(381,000)	(262,000)
Minnesota	31%	26%
Wisconsin	13%	11%
Michigan	9%	9%
Illinois	8%	10%
Iowa	6%	8%
Ohio	5%	7%
Indiana	4%	6%
Florida	4%	3%
New York	3%	2%
Pennsylvania	2%	2%

Special Tabulations, ITS US 2012 prepared by Research Resolutions.

PURPOSE, PARTY COMPOSITION, LENGTH OF STAY

Almost all American fishing trips in Northern Ontario are *pleasure* trips. The angler's travel party will likely include three adults and they will spend between six and seven nights in Northern Ontario on their trip. This profile is equally characteristic of *all* American anglers and the segment that relies on paid, roofed lodging.

As noted in the corresponding section on domestic anglers, operators may need to take proactive steps to encourage their American customers to bring children and/or grandchildren on their trips since studies suggest that if people are not introduced to fishing as children, they are not inclined to take up the sport as adults. For more discussion of market retention and growth options, see the final chapter of this report (*Learning from Others*).

Table 18: American Anglers Trip Profile

	American Anglers in Northern Ontario	
Overnight Visitors	**Total**	**Nights in Paid Roofed Lodging**
	(381,000)	(262,000)
Trip Purpose		
Pleasure	97%	99%
Visit Friends/Relatives	1%	1%
Party Composition		
Adults Only	90%	93%
With Children/Teens	10%	7%
Average Party Size	3.4	3.4
Length of Stay in Location		
Average Length of Stay	6.7 nights	6.0 nights

Special Tabulations, ITS US 2012 prepared by Research Resolutions. Numbers/percentages add to more than total/100% because of duplication.

AGE & GENDER

Just like their Canadian counterparts, American anglers in Northern Ontario are more likely to be men than women but the predominance of men is even more pronounced among Americans (82%) than Canadians (62%).

Young adults – those between 20 and 34 years – are very uncommon among Northern Ontario's U.S.A. anglers as a whole (9%) and those who utilize paid, roofed lodging (11%). In fact, almost one third of this market segment are 55 to 64 years and the same percentage is 65 years of age or older. In other words, three fifths of all U.S.A. anglers (57%) and those in the paid roofed lodging segment (61%) are 55 years of age or over.

This older skew is manifest in the average ages of U.S.A. anglers: overall, they are about 52 years of age, or about seven years older, on average than their Canadian counterparts on fishing trips in Northern Ontario (45 years, on average). American paid roofed lodging users are even older, averaging 53.7 years.

Table 19: American Anglers Trip Profile - Age & Gender

	American Anglers in Northern Ontario	
Overnight Visitors	**Total**	**Nights in Paid Roofed Lodging**
Location(s) in Which Nights Spent	(381,000)	(262,000)
Gender of respondent		
Male	82%	86%
Female	18%	14%
Age of respondent		
Children/teens (19 or younger)	10%	6%
20 – 34	9%	11%
35 – 54	24%	23%
55 – 64	28%	30%
65+	29%	31%
Average Age	52.0 years	53.7 years

Special Tabulations, ITS US 2012 prepared by Research Resolutions. Numbers/percentages add to more than total/100% because of duplication.

LODGING NIGHTS

Of the 2.5 million nights spent by American anglers in Northern Ontario, about 6-in-10 were in paid roofed lodging, about 1-in-10 were spent in campgrounds and 2-in-10 were spent in private lodging. [14]

Commercial cottages are the most popular form of paid roofed lodging among American anglers. Rental cottages account for fully half (54%) of nights they spent in the region. Motels and hotels account for a further seven per cent of their nights in Northern Ontario.

Private cottages are also used by the U.S.A. market, accounting for one sixth of all the nights these Americans spend in the region (293,000 nights; 16%).

Table 20: American Anglers Trip Profile - Lodging Nights

	American Anglers in Northern Ontario	
Overnight Visitors	**Nights in Northern Ontario**	
Total Person Nights	**2,541,000**	
	#	%
Paid, Roofed Lodging (All Types)	**1,561,000**	**61%**
Commercial cottage	1,380,000	54%
Motel	145,000	6%
Hotel	36,000	1%
Campground	**231,000**	**9%**
Private Lodging (Total)	**460,000**	**18%**
Private home	67,000	3%
Private cottage	393,000	16%
Other/not stated	289,000	11%

Special Tabulations, ITS US 2012 prepared by Research Resolutions. Numbers/percentages add to more than total/100% because of duplication. Less detail about accommodation type is covered in the ITS than

[14] The questionnaires for Statistics Canada's US and Canadian travel surveys provide different lodging choices for survey respondents. Furthermore, respondents self-identify their lodging type from an available list that does not provide descriptions to aid in differentiating a "lodge" from a "resort" or "commercial cottage/cabin". This analysis can only provide information *as reported*, recognizing that consumer responses may not match industry definitions of lodging types.

OTHER ACTIVITIES ON THE FISHING TRIP

American anglers seem highly focussed on *fishing*. Boating and shopping are the only other activities to attract at least one quarter of them. About one eighth go sightseeing, visit nature parks and/or friends and relatives.

Less than one tenth of them engage in any cultural or entertainment activity during their stay in the North. In light of this very limited activity profile, getting American anglers to participate in cultural or hospitality experiences offered in the region's urban areas will likely be a hard sell.

Participation in various activities by those who use paid roofed lodging in the North follows a pattern almost identical to that of the American market as a whole.

Table 21: American Anglers: Activities on the Trip

	American Anglers in Northern Ontario	
Overnight Visitors	**Total**	**Nights in Paid Roofed Lodging**
	(381,000)	(262,000)
Boating	36%	28%
Shopping	25%	22%
Sightseeing	12%	9%
National, provincial or nature park	12%	10%
Visit friends/relatives	11%	6%
Camping	9%	1%
Historic site	7%	6%
Bar/nightclub	6%	7%
Festival or fair	2%	*
Hunting	2%	2%
Museum or art gallery	2%	2%
Sports event as a spectator	1%	*
Performance (e.g., play or concert)	*	*
Theme or amusement park	*	*

*Special Tabulations, ITS US 2012 prepared by Research Resolutions. Numbers/percentages add to more than total/100% because of duplication. *Less than 0.5%.*

SPENDING ON THE AMERICAN ANGLER TRIP

Irrespective of their lodging choices, American anglers in Northern Ontario spent $258.0 million on their trips in 2012.[15] Of this amount, four fifths or $217.1 million were spent by those using paid, roofed lodging in the region (84%). The remaining $40.9 million were spent by Americans who went fishing but stayed with friends and relatives, in their own cottages or at campgrounds.

Each trip brings $2,270.00, on average, to the region for a trip of about six nights. Not surprisingly, the per trip spend increases among anglers using paid roofed accommodation ($2,820.00) and experiences a corresponding decrease in the market segment that uses other forms of lodging in Northern Ontario ($1,120.00).

There is a clear benefit of retaining the solid support American anglers provide to paid roofed lodging establishments in the North. This segment, heavily reliant on commercial cottages and other roofed lodging contribute 60% **more** to the North's tourism revenues than those who spend their nights in campgrounds or private homes/cottages.

Americans fishing in Northern Ontario on overnight trips spend about $320.00 *per night.* Similar to their spending on the entire trip, anglers using paid roofed lodging spend $420.00 per night – about 67% *more* than their counterparts who use other types of lodging ($140.00 per night).

Table 22: American Angler Spending in Northern Ontario[16]

Visitor Spending – All Anglers	**$258,000,000**
Paid Roofed Lodging Anglers	$217,100,000
No Paid Roofed Lodging Anglers	$40,900,000
Paid Roofed Lodging Anglers' Share of All Angler Spending	**84%**
Average Per Trip (All)	**$2,270.00**
Paid Roofed Lodging Anglers	$2,820.00
No Paid Roofed Lodging Anglers	$1,120.00
% Benefit of Paid, Roofed Lodging	**60%**
Average Per Party Per Night (All)	**$320.00**
Paid Roofed Lodging Anglers	$420.00
No Paid Roofed Lodging Anglers	$140.00
% Benefit of Paid, Roofed Lodging	**67%**

Special Tabulations, ITS US 2012 prepared by Research Resolutions.

[15] American spending estimates exclude domestic carrier fares for transport to/from Canada.

[16] See above.

AMERICAN & CANADIAN SPENDING ON THE TRIP

When compared to corresponding Canadian anglers, American anglers' importance is amply evident: at $258.0 million, American anglers bring 76% *more* spending to Northern Ontario than do their Canadian counterparts ($146.4 million).

The differences are especially dramatic within the segment of the market that relies on paid, roofed lodging: Americans in the segment generate 253% *more* tourism revenue for Northern Ontario ($217.1 million) than do their Canadian counterparts ($61.5 million).

Table 23: Visitor Spending in Northern Ontario – Americans & Canadians

	Americans	Canadians	% Difference in Favour of Americans
Visitor Spending – All Anglers	$258,000,000	$146,400,000	76%
Paid Roofed Lodging Anglers	$217,100,000	$61,500,000	253%
No Paid Roofed Lodging Anglers	$40,900,000	$84,900,000	-52%
Average Per Trip (All)	$2,270.00	$350.00	549%
Paid Roofed Lodging Anglers	$2,820.00	$650.00	334%
No Paid Roofed Lodging Anglers	$1,120.00	$260.00	331%
Average Per Party Per Night (All)	$320.00	$93.00	244%
Paid Roofed Lodging Anglers	$420.00	$140.00	200%
No Paid Roofed Lodging Anglers	$140.00	$70.00	100%

Special Tabulations, TSRC 2012/2013 Pooled; ITS US 2012 prepared by Research Resolutions.

OVERSEAS ANGLERS

Regardless of where they visit, Canada's overnight tourists from countries outside the U.S. are very unlikely to go fishing. Of 3.8 million overseas overnight tourists to Canada in 2012, only about 1-in-50 did any fishing on their trip (94,000) and considerably fewer both went fishing and stayed in paid, roofed lodging (51,000). Northern Ontario captures a small share of its anglers from overseas (3,000).

LEARNING FROM OTHERS

FACING THE FACTS: FRESH WATER FISHING IS DECLINING

Most anglers are NOT tourists

Most studies on anglers do not distinguish between people who fish in their local environs and those who fish on trips away from home (tourists). Hence, caution should be exercised in extrapolating the findings of the studies cited herein to *tourists who fish*.

In fact, according to a large scale American study, about 90% of U.S. fresh water anglers travelled four hours or less to reach their fishing destination and half travelled no more than thirty minutes. Thus, only about 1-in-10 of the estimated 37.8 million fresh water anglers in the U.S. might be considered *tourists.*

Special Report on Fishing 2014, pg. 16.

The Outdoor Foundation has been measuring fishing participation in the U.S. since 2006.[17] In its newest study (2014), it is clear that fresh water fishing continues to be predominant among American anglers although the market has fallen among men, women and children (6+ years) from 39.1 million in 2012 to 37.8 million in 2013.

According to the study, freshwater fishing has higher female and youth participation rates compared to other types of fishing, but it is also the least ethnically diverse.

While representing an opportunity for Northern Ontario, fly fishing attracts considerably fewer participants than traditional fresh water fishing. It has hovered around 6.0 million American anglers from 2006 through 2013. While a much smaller market, fly fishing is the most male-dominated type of fishing. More than 70 percent of fly fishing participants are male. [18]

Year	# of Participants - All	# of Participants - Freshwater	# of Participants – Fly Fishing
2006	49.7 million	43.1 million	6.1 million
2007	51.8 million	43.9 million	5.8 million
2008	48.2 million	40.3 million	5.9 million
2009	48.0 million	41.0 million	5.6 million
2010	45.4 million	38.9 million	5.5 million
2011	46.2 million	38.9 million	5.7 million
2012	47.0 million	39.1 million	6.0 million
2013	45.9 million	37.8 million	5.9 million

Source: Special Report on Fishing 2014, A Partnership Project of American Boating & Fishing Foundation and Outdoor Foundation, pages 6, 15, 23

[17] Findings from its 2012 report are summarized in the *High Yield Anglers* analysis available from TNO.
[18] *Special Report on Fishing 2014*, A Partnership Project of American Boating & Fishing Foundation and Outdoor Foundation, page 18.

FACTORS INFLUENCING MARKET DECLINE

Other studies in the U.S. and Canada support findings of a declining fishing market.[19] Explanations in both countries include increased urbanization, increased immigration, the lower take-up rate of fishing among immigrant groups, and aging of the population.

Increased urbanization: Urbanization has multiple impacts on the fishing market. Not only is access to fishing sites reduced but also the social camaraderie associated with angling (and hunting) diminish as the populations of Canada and the U.S. become more urbanized.

> *The loss of lands for hunting and fishing and the **loss of access to lands** for hunting and fishing—also contributed to declines in the activities. Additionally, as an area becomes more urban, there is a **dilution of the hunting and fishing traditions** and the **loss of social groups that participate in the activities**; in other words, as an area urbanizes, hunters and anglers will likely have fewer neighbors who participate in these activities.*[20]

Impacts of immigration: Studies show that the fishing market is highly concentrated in small town and rural areas. As these populations migrate to cities, the traditional angling market experiences a corresponding decline. It is also the case that most new immigrants to Canada and the U.S. settle in the respective countries' cities and these new residents have low take-up rates for the sport.

Aging populations: Fisheries and Oceans Canada estimates that about 1-in-3 active anglers are 25 to 45 years of age (29%) and 2-in-3 (66%) are at least 45 years old. Corresponding figures for fresh water anglers in the U.S. also suggest an older skew to the market: 1-in-2 are 45 years of age or over and a further 40% are between the ages of 25 and 44 years. As these populations continue to age, health and mobility factors will exert negative influences and many will retire from the sport.

In a study among U.S state agency personnel that manage hunting and fishing participation and opportunities, those surveyed cite numerous factors that contribute to increases in fresh water fishing among state residents and those from out of state.[21]

- Marketing efforts are the most widely cited factor for residents and non-residents.
- Youth recruitment/retention programs and, to a lesser extent, those targeting adults were commonly mentioned for having an impact on the resident market though were not seen as effective in attracting the out-of-state market.
- Maintaining high levels of fish stock and easy access to fishing sites were also deemed helpful in increasing participation in the sport.

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[19] *Survey of Recreational Fishing in Canada 2010*, Department of Fisheries and Oceans Canada; *Exploring Recent Increases in Hunting and Fishing Participation*, American Sportfishing Association, Responsive Management, the Oregon Department of Fish and Wildlife, and Southwick Associates, 2013

[20] *Exploring Recent Increases in Hunting and Fishing Participation*, pg.8.

[21] *Exploring Recent Increases in Hunting and Fishing Participation*, pg.26.

These findings suggest that *interventions* by DMOs such as OTMPC, TNO and sub-regional marketing organizations have an important role to play in retaining and/or growing the market for angling in Northern Ontario. At the same time, state officials indicated that each factor had more of a *minor* than *major* impact on market growth and note that recruitment programs are more effective at *retaining* existing anglers than in *bringing new* people into the sport.

Factors contributing to increases in freshwater fishing participation in U.S. states

	Among State Residents	Among Non-Residents
	%	%
Marketing	48	30
Youth recruitment and retention programs	44	7
Stocking programs	37	30
Access	33	22
Adult recruitment and retention programs	33	4
Other special events	48	N/A
Economy in the state	26	7
Weather factors	22	11
Changes to license purchasing process	11	15
Changes to license structure	11	7
Demographic factors	7	N/A
Locavore / foodie /green movement	11	4

Source: Exploring Recent Increases in Hunting and Fishing Participation Produced by the American Sportfishing Association, Responsive Management, the Oregon Department of Fish and Wildlife, and Southwick Associates 2013, page 36

Reaching out to youngsters: The importance of youth recruitment and retention programs for the future of fishing cannot be over-stated: consider the fact that more than four fifths (84%) of America's adult fishing enthusiasts report having gone fishing before the age of 12. As the angler market ages and the potential market for Northern Ontario is increasingly concentrated in urban areas, new types of outreach programs to encourage participation in the sport may be necessary.

Examples of such proactive steps include *license free family fishing programs* promoted by a consortium of Canadian governments, associations and fishing gear manufacturers. Such programs are designed to give Ontario youngsters fishing experience. Programs such as this acknowledge the importance of providing fishing experiences to children so they have a better chance of being anglers as adults and may contribute to the health of the provincial market. [22]

[22] Sponsored by Ontario Federation of Anglers and Hunters, Province of Ontario, Canadian Sportfishing Industry Association, Canadian National Sportfishing Foundation, Fisheries and Oceans Canada, Lucky Strike, Shimano and Ontario Out of Doors.

OTHER JURISDICTIONS ARE FACING THE SAME CHALLENGES

Fishing and hunting are very important activities in many provinces and U.S. states including neighbouring Minnesota. Recognition of the diminishing market for anglers and hunters led this state to initiate a recruitment and retention strategy in 2013.[23] Because of the importance of Minnesota to Northern Ontario's angling businesses and because Northern Ontario faces very similar challenges, we devote considerable space to a description of the Minnesota findings.

REACHING YOUTH

As noted earlier, the markets on both sides of the border are aging and take-up rates for fishing among youth are not as high as they once were.

> *Two unprecedented generational challenges are negatively affecting Minnesota hunting and fishing participation rates: 1) Younger Minnesotans are not participating in hunting and fishing as did previous generations; and 2) a large cohort of older hunters and anglers are at or near the age at which they will stop participating because of health, mobility or other age-related lifestyle choices. The net result will be an increasingly smaller percentage of the state's population that hunts and fishes.*[24]

The decline in young adult fishing participation will be especially problematic over the long term because most anglers learned to fish when they were children. As new generations are not exposed to fishing as young people, there is a much greater chance that their children will not become anglers.

IMMIGRANT MARKETS

Most anglers in Ontario are multi-generational Canadians but as the immigrant population increases in the province and as the non-white/Hispanic population in the U.S. continues to

Recruitment

- *Develop and support after school sporting clubs for youth age 8 to 18.*
- *Develop and support "I'm an angler/hunter" marketing campaign that targets adults from ages 18 to 44.*
- *Develop and support "Learn to hunt/fish" workshops and events for adults age 18-44.*
- *Develop and support family-oriented outdoor skills sampler events.*

Retention

- *Create and support a web-based clearinghouse of hunting, fishing and outdoor skills information targeted at adults age 18-44.*
- *Create and support a reverse mentoring campaign targeted at maintaining the participation of adults age 45 and older.*
- *Create and legislatively enact a new family license that incorporates hunting, fishing, state park admittance and other privileges.*

Commissioner's Council on Hunting and Angling Recruitment and Retention, 2013 (Minnesota)

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[23] See sidebar for a brief summary. For a more complete description, see *A summary of work and recommendations of the Commissioner's Council on Hunting and Angling Recruitment and Retention*, 2013. Available as a pdf online at http://files.dnr.state.mn.us/recreation/hunting/harr/ccrr.pdf

[24] *A summary of work and recommendations of the Commissioner's Council on Hunting and Angling Recruitment and Retention*, 2013, page 6.

grow, the market with a cultural history of fishing will represent a smaller share of the potential Canadian and U.S. markets.

> *The race/ethnic population segments that generally have lower hunting and fishing participation rates (non-white and/or Hispanic) are growing and will continue grow in the future. This means cultural populations that do not have long-standing Minnesota hunting and fishing traditions will represent a larger percentage of the state's population. This will be a recruitment challenge because some of these populations do not have the cultural references or tradition-based experiences that would exert internal pressures to pass these activities on to the next generation.*

Recommendations made by the Minnesota Commissioner's Council for retention and recruitment might be useful for Northern Ontario to consider. These are summarized in the accompanying sidebar.

OTHER OUTREACH PROGRAMS

URBAN RECRUITMENT

Northern Ontario certainly cannot assume full responsibility for recruitment and retention among anglers. Instead, province wide programs and specifically those that encourage fishing in the ponds, lakes and rivers that run through major cities are likely to prove critical to keeping the Ontario angling market robust.

In other words, many urbanites that have not fished or have not done so in a long time might be tempted by the sport if they could start by fishing close to home. Thus, the development of urban fishing programs could be an important source of anglers for more distant destinations – e.g., Northern Ontario.[25] Some suggestions for creating these types of programs are described in the following paragraphs.

> *For an urban fishing program to be successful, a fishing resource must be identified or developed that is easily accessed, facilities need to be provided to make the site accommodating, and the resource must be advertised to recruit new and lapsed anglers. Planning and developing an urban program using this three-step process increases the likelihood of recruiting and retaining anglers in growing urban centers*[26]

Cost is also an important factor. It should be minimized in order to attract urban dwellers who might otherwise not try fishing because of the initial costs. Apparently, many U.S. states have fishing tackle loaner programs that allow someone to try fishing without having to purchase equipment.

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[25] *Opportunities for Urban Fishing: Developing Urban Fishing Programs to Recruit and Retain Urban Anglers*, Dane M. Balsman† and Daniel E. Shoup, 2008.

[26] As above, page 32.

The literature suggests that the high concentration of non-anglers and lapsed anglers in urban centres can be effectively recruited and retained through properly designed and marketed urban fishing programs.

A key risk of *not* promoting urban fishing programs is that without these opportunities, busy urbanites will likely be drawn toward the numerous other recreational activities that are conveniently available in urban centers and require smaller amounts of time, leading to further declines in angling involvement and concern for conservation and the natural world.[27]

MESSAGING TOOLS

Finding the messages that are most meaningful to current and potential anglers can be useful in developing promotional campaigns to attract them to the sport and to Northern Ontario.

Promote positive associations: American anglers were asked to describe *the best [and worst] thing about fishing.* The responses differ somewhat between men and the considerably smaller segment of women.

Top *Best* and *Worst* Things About Fishing among U.S. Adult Anglers

	Men	Women
Best Thing	%	%
Catching fish	40	29
Enjoying sounds/smells of nature	31	30
Getting away from usual demands of life	30	35
Being close to nature	27	21
Spending time with family/friends	24	34
Observing scenic beauty	22	26
Worst Thing	%	%
Not catching any fish	37	36
Fishing spots too crowded	20	16
The hassle (loading equipment, finding place to fish, driving)	15	16
Baiting hooks/taking fish off hooks	6	30

Source: *Special Report on Fishing 2014*, A Partnership Project of American Boating & Fishing Foundation and Outdoor Foundation, page 51.

[27] *Opportunities for Urban Fishing: Developing Urban Fishing Programs to Recruit and Retain Urban Anglers*, Dane M. Balsman† and Daniel E. Shoup, 2008

Another major U.S. study supports these findings:

- 70% of anglers claim that they fish for the sport, recreation, relaxation, or fun;
- 32% for food/fresh fish to eat;
- 20% to be with family and friends; and less commonly,
- 11% to be close to nature.[28]

Looking to why newcomers decided to try fishing may be a good source of market intelligence for efforts to attract anglers to Northern Ontario. Key prompts include the potential adventure and excitement of the sport and having time with the family. Other salient motivations that could be incorporated in promotional materials include *self-sufficiency* (catching own food), *solitude*, and possibly developing incentives for mentoring -- encouraging seasoned anglers to bring a novice along.

Motivations for Fishing the First Time

	U.S. Adult First Time Anglers
Experience excitement/ adventure	49%
Spend time with family	47%
Ease of access to fishing	38%
Try catching my own food	29%
Solitude	28%
A friend/relative took me	28%
Part of a vacation or group outing	27%
To try a new hobby	22%
Low cost of fishing equipment	21%
Fished as a child	21%
Disconnect from electronics	19%
Wanted to take my children fishing	18%

Source: *Special Report on Fishing 2014*, A Partnership Project of American Boating & Fishing Foundation and Outdoor Foundation, page 48.

[28] *Exploring Recent Increases in Hunting and Fishing Participation* Produced by the American Sportfishing Association, Responsive Management, the Oregon Department of Fish and Wildlife, and Southwick Associates 2013, page 142

APPENDICES

INFORMATION SOURCES:

Sources of information used in this report include the following:

- Statistics Canada, 2013 (2012/2013 pooled) Travel Survey of Residents of Canada (TSRC);
- Statistics Canada, 2012 International Travel Survey (ITS);
- TNS Regional Reports— RTO13a, 13b, 13c, RTO13 (2012);
- *Special Report on Fishing 2014*, A Partnership Project of American Boating & Fishing Foundation and Outdoor Foundation;
- *Participation Topline Report*, 2014, The Outdoor Foundation.
- *Survey of Recreational Fishing in Canada 2010*, Department of Fisheries and Oceans Canada;
- *Exploring Recent Increases in Hunting and Fishing Participation*, American Sportfishing Association, Responsive Management, the Oregon Department of Fish and Wildlife, and Southwick Associates, 2013
- Rediscovering Northern Ontario: Partnerships for a Strong Tourism Industry, Northern Ontario Tourism Marketing Strategy, 2012-2017. Government of Ontario, 2012
- A summary of work and recommendations of the Commissioner's Council on Hunting and Angling Recruitment and Retention, 2013. Available as a pdf online at http://files.dnr.state.mn.us/recreation/hunting/harr/ccrr.pdf

MTCS GLOSSARY: ECONOMIC IMPACT TERMS[29]

Gross domestic product (GDP): value of goods and services produced by labour and capital located within a country (or region), regardless of nationality of labour or ownership. This GDP is measured at market prices. Tourism GDP refers to the GDP generated in those businesses that directly produce or provide goods and services for travellers.

Direct impact: refers to the impact generated in businesses or sectors that produce or provide goods and services directly to travellers, e.g. accommodations, restaurants, recreation providers, travel agents, transportation, and retail enterprises. Direct impact on GDP, employment, and tax revenues is also called tourism GDP, tourism employment, and tourism tax revenues.

Indirect impact: refers to the impact resulting from the expansion of demand from businesses or sectors that directly produce or provide goods and services to travellers, to other businesses or sectors.

Induced impact: refers to the impact associated with the re-spending of labour income and/or profits earned in the industries that serve travellers directly and indirectly.

Employment: refers to number of jobs, including full-time, part-time, and seasonal employment, as well as both employed and self-employed.

Federal tax revenues: include personal income tax, corporate income tax, commodity tax (GST/HST, gas tax, excise tax, excise duty, air tax and trading profits) and payroll deduction that collected by the federal government.

Provincial tax revenues: include personal income tax, corporate income tax, commodity tax (PST/HST, gas tax, liquor gallonage tax, amusement tax and trading profits) and employer health tax that collected by Ontario provincial government.

Municipal tax revenues: include business and personal property taxes that collected by the municipalities. Collection, however, does not follow immediately the consumption or production of goods and services in a municipality by visitors (as is the case with HST or personal income taxes). Rather, these taxes show the percent of the total property taxes collected by a municipality that can be attributed to tourism because of tourism's contribution to the economic activity of the municipality and hence its tax base.

Industry: The industry follows Statistics Canada's 2007 North America Industry Classification System (NAICS) Input-Output small aggregation industry classification.

[29]MCTS glossary, from website (http://www.mtr-treim.com/webtreim/data_out/NP1/EconomicImpact.pdf), July 2012.