

# TAB E

# Competitive Analysis of the Outfitted Recreational Sport Fishing Sector of the Northwest Territories

March, 2014

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## PURPOSE

This research will be used to recommend a competitive marketing strategy and branding of the fishing sector by Northwest Territories Tourism.

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## Executive Summary

The Northwest Territories (NWT) overnight sport fishing sector has faced a series of external trends that have led to a decline in visitation over the last decade. This has resulted in a consolidation of NWT lodges, with some closing their doors and others no longer investing or marketing their products. Despite this, the overnight sport fishing sector remains one of the largest sources of revenue for tourism in the territory.

The Northwest Territories Tourism recognizes this value and has facilitated this research in an effort to assist with the marketing and branding of the overnight sport fishing sector. Fortunately, the fishing product and the quality of the resource in the NWT are excellent and not in question. The research, reinforced through interviews with anglers, clients and lodge owners, reported that there are plenty of fish, large fish, and a wide variety of species.

The diversity of lodges, whether small, medium or large scale offer a variety of options for anglers visiting the NWT in terms of the species to fish, the overall experience, service and amenities. Lake Trout and Northern Pike, the showcase species for all NWT lodges, coupled with exciting tactics offer a variety of specific marketing and positioning options.

Anglers are specific in their marketing needs and their “path to purchase”. They require specific and credible information early in the process in order to move them from destination awareness through to a sale at the lodge. The NWTT is responsible for raising destination awareness, providing some fulfillment materials and then pointing prospective clients to lodges of interest. Lodges play a critical role in this and need to be ready to deliver on this awareness and work towards closing the sale.

The nature of the overnight sport fishing business has changed with trends such as: aging anglers, shorter trips, the importance of the Alberta market and decline in the American and corporate market. These trends are also facing other competitive destinations such as Northern Manitoba, Northern Saskatchewan and Northern Ontario. Through a competitive analysis of other jurisdictions, the research has identified a series of unique attributes, associated unique selling position suggestions, and some key market segments to target.

The unique attributes revolve around: a series of natural features, the fish and the fishery, experiential elements and lodge elements. The unique selling position's are suggested to feature: (1) NWT's lodge culture, (2) fishing wild places, (3) excitement in the bite and (4) the quality fishery. Critical to this is a need to bring the excitement back to the NWT lodge fishing experience, to dial up the emotional appeal and to focus on the authentic nature of the product.

## Purpose of the Research

NWT has a compelling brand, emotive creative, and does an incredible amount of marketing with a limited budget. This is reflected in the increasing market share captured in other sectors, such as Aurora and visiting friends and relatives. Unfortunately, many in the overnight sport-fishing sector are struggling and will continue to lag unless the destination marketing adequately reflects their sector and they buy into and participate in the upcoming efforts around re-branding and re-positioning.

The Northwest Territories Tourism (NWTT) recognizes this and has placed the overnight sport fishing sector top of mind when considering special marketing campaigns.

The NWT must focus on its unique selling position (USP) and develop key messages to target markets that are consistently communicated in all marketing materials that is differentiated from the competition.

This research provides the marketing team at NWTT and creative agency of record with an overview of the various marketing elements within this sector and a series of recommendations for the overnight sport-fishing sector. The intention is that lodges and outfitters in the NWT can then work with the destination marketing efforts and use it in generating sales for their lodge.

## Methodology and Scope

The research was facilitated largely through supply side interviews, and supplemented by secondary research. An NWT marketing materials audit was also undertaken as well as a competitor analysis through print and online marketing materials.

Interviews were conducted with NWT Outfitters and lodge owners, lodge clients, national industry representatives, NWTT marketing staff, contractors, guides and sector experts.

All individuals interviewed or consulted are listed in Appendix D. Interviews were held in confidence with assurances that specific comments would not be attributed to individuals. Please note that all quotes credited to “Lodge Owners” are all related to NWT lodges.

Secondary research included information from national, international, competitor and NWT sources are referenced and listed in Appendix E.

As a component of this research, the consultant was able to generate initial feedback on general NWT positioning from a large group session at the NWTT

Hay River AGM in October of 2013. Portions of the research were also presented to industry at a Sport Fishing Forum held by NWTT in Yellowknife in March of 2014.

Finally, an extensive website and print material lodge competitor analysis was undertaken and has been provided as a stand alone document entitled *Lodge Comparison Competition NWT* as well as a review of competitors print and web materials in Appendix A.

There are some assumptions that have limited the scope of the research to focus specifically the overnight sport fishing industry. These assumptions focus on: the overnight sport fishing product and not day product, as well as destination marketing and not lodge specific marketing.

### *Overnight Sport Fishing and Not Day Product*

A distinction was made to focus specifically on the overnight sport fishing sector, also referred to as the overnight outfitted sector. These are primarily fly-in lodges accessed through the NWT and to a far lesser degree Saskatchewan, where their primary intention is to fish.

This research considered the full spectrum of NWT fishing lodges which included an overnight all-inclusive, full service experience to a “do it yourself” self-catered and guided experience. The spectrum of fishing lodges will later be referred to as small, medium and large scale lodges.

Day product outfitters were interviewed for their insight, however, not all recommendations will apply to the day product market. There is considerable difference between day product (i.e. half-day fishing for Northern Pike out of Yellowknife) and an overnight fly-in lodge experience. Day product caters to different markets, drivers, sales channels, and features different fishing expectations.

Day fishing product is doing well in the NWT with current outfitters satisfying demand and experiencing steady growth. Traditional destination marketing efforts for day product are served well under the current *Spectacular* brand and work well with the current business traveler (includes Meeting, Conventions and Incentive Travel), visiting, friends and relatives (VFR), rubber-tire travelers and general outdoor adventure markets.

Similar to day product, independent anglers who are planning to fish neither with a guide nor in a lodge, were not a focus of the research (i.e. Alberta anglers traveling by personal vehicle often with a personal boat).

While day fishing product and independent anglers are important for the industry, communities and regions of the NWT, some of the recommendations will not directly apply.

*“It is easy to sell day product given we have world-class fishing out of Yellowknife”. Fishing Outfitter*

### ***Destination vs. Outfitter/Lodge Specific Marketing***

Another distinction made in the research is that the marketing recommendations will focus on the overall destination marketing rather than marketing for individual lodges. The NWTT has the mandate to generate awareness and provide some fulfillment materials for the overnight sport fishing sector. Individual lodges conduct their own marketing and participate in NWTT’s marketing program to varying degrees in order to drive and convert sales.

With limited resources, the NWTT must find that “sweet spot” in the marketing of the overnight sport fishing sector where it resonates and can be used by a wide variety of fishing lodges. The recommendations within this research attempt to find that “sweet spot” and will work for various lodges, regardless of their product offerings, positioning, and other distinguishing factors.

## **Current Context**

The NWT has seen a significant decline in the overnight sport fishing sector over the last decade. This decline has continued with sport fishing visitation decreasing from 5,000 visitors in 2010-2011 to 4,700 in 2011-2012<sup>2</sup>. This has resulted in many lodges struggling to maintain occupancy levels and general profitability.

As a result, there has been a consolidation of the industry with many lodges closing down, selling or not continuing to invest in marketing or their lodge infrastructure<sup>3</sup>. Circumstances are all different, with some lodge owners having taken on other full-time work; others have passed the lodge on to their children and operate it on a part time basis. A few lodge owners stated they were operating the lodge as a “hobby” business, mainly for visiting, friends and family and are “as busy as they want to be”.

Reasons for the decline are not only affecting the NWT, rather are influenced by trends experienced across Canada and globally.

Negative factors cited in the secondary research and stated by lodge owners that have led to declines include<sup>4 5</sup>:

- There are fewer anglers in general;
- Anglers are aging and not being replaced by newer ones;
- The downfall of the US economy;
- Changes in American travel patterns post 9/11;



- Border issues and Canada/US relations;
- Other more “exotic” global fishing opportunities;
- Decline in corporate travel market;
- The ban on caribou hunting;
- Unfavorable exchange rates; and
- Higher operator costs.

Many lodges reacted to this decline and attempted to diversify their product to fit the mainstream outdoor adventure or eco-tourism market<sup>6</sup>. Lodge owners stated that this was a difficult fit and they could not make it work. Reasons cited included: the difficulty in mixing the consumptive market with eco-tourists, not enough available capital to invest, and the challenges with offering product of this nature in their location. One lodge owner stated:

*“Some made an honest effort with photography classes, cooking classes, bird-watching, but there are so many reasons why this was unsustainable for them and they could only book so many weeks.” Lodge Owner*

While fishing is declining it is still one of the highest in visitor spending for the NWT. According to the 2010-2011 Visitor Exit Survey, the industry is still significant, generating the highest amount of visitor spending at \$11.8 million in visitor spending.

*“There is apathy out there with people thinking fishing is declining and there is nothing we can do. Other places are out there actively marketing as should we.” Lodge Owner*

Fortunately, angler satisfaction within the NWT is still very high. Lodges are receiving high ratings through Visitor Exit Surveys, with clients particularly enjoying elements such as: shore lunches, the guides, lodge services and amenities. The product is still viewed favorably, given the level of repeat business and the fact that visitor exit surveys indicate that 97% would recommend their outfitter to others<sup>7</sup>.

Another positive attribute of the NWT angling product is the quality of the fishing resource. There was consensus amongst lodge owners that the quality of the sport fishery is in excellent shape. The quantity of fish caught, relative size of fish, variety of species and general ease of fishing in the NWT were never raised as issues through the research. In fact, many lodge owners and guides stated that fishing is better now given the longstanding promotion of catch and release in the NWT.

It should be noted that not all lodges are struggling. Some lodge owners have stated that they are experiencing steady growth and profitability.

*“Business is doing well and growing. Last year we were full. We are getting*

*a bigger share of a smaller pie.” Lodge Owner*

## Industry and Product Overview

There is a vibrant, rich, and storied history of fishing lodges in the NWT. Many lodge owners commented on the good old days of the 1980's when the corporate market was strong, American's would come consistently and for those in the hunting business, the fishing business was just the “gravy”.

There are approximately 40 lodges currently licensed in the NWT<sup>8</sup>. This number has fluctuated from year to year, in particular with small to medium sized lodges that decide on an periodic basis on whether to operator or not.

### The Typical NWT Lodge Experience

As will be discussed in the next section, each fishing lodge is unique in its infrastructure, service, amenities and fishing product. However, there are some typical aspects that are generally shared in an NWT fly-in overnight sports fishing lodge experience. These include:

- Anglers make their way to Yellowknife (or in a more limited way Saskatoon or Winnipeg) via regular jet service;
- Anglers often spend an evening in Yellowknife at a local hotel picking up last minute items, such as snacks and drinks, with a dinner at a local favourite (i.e. Bullocks Restaurant or the Wildcat Café);
- The majority of lodges are accessed via floatplanes and land on a lake. There are a few lodges that land on a remote runway;
- The majority of anglers are repeat visitors that have been to the lodge before or they have done enough research to have a detailed picture in their mind;
- Anglers get comfortable, are provided a lodge orientation and safety briefing, and then get their fishing gear ready to head out fishing;
- If guided, they meet their guide and head out on the lake to fish some close spots for the species of their choice. For those that are unguided and not familiar with the lake, they will either go out with the guide onsite or owner to orient them to the lake, the equipment and find some “holes”. For those that have been there before, they may head out to their favorite spots by themselves to get into the action right away;
- A typical day includes breakfast, out early to fish, a shore lunch at a predetermined location, more fishing and back for dinner by 7pm;
- After dinner may include a nap, some drinks, fishing stories, and a visit to a wood fired hot tub.

## Scale of Fishing Lodges

The NWT does not offer a homogenous overnight sport fishing product. There are a wide variety of products being offered with differences in lodge amenities, services, species, price, and the overall marketing and positioning.

The interviews with lodge owners brought forth these differences; however, there were notable similarities with lodges of similar scale. The general scale of a lodge is less about the physical footprint, rather it involves factors like: the number of guests, the staff to guest ratio, the size of the lake, sheltered or unsheltered water, proximity to a transportation hub, guided or unguided product, size of the fish, species, and services offered. As will be discussed, insights into the scale of the lodges in the NWT highlight some current deficiencies and opportunities for marketing the overnight sport fishing sector.

### *Small and Medium Scale Lodges*

Small scale lodges are typically characterized as: being able to take less than eight guests, offer limited services and amenities, are on sheltered waters, have steady fishing action with the potential for a few trophy-sized Lake Trout or Northern Pike, and typically offer an unguided product.

Some of these lodges would be considered more rustic and like that of “outpost camps”. Clients usually book the entire facility, bring their own supplies and have “the run of it” for a duration of time. It is the type of experience where basic amenities are provided, boats and motors are supplies and one individual may be on site to provide an orientation and some basic support. Anglers are then left on their own to take care of themselves and fish on their own schedule.

There were a few small scale lodge owners making basic upgrades to their infrastructure to keep it in shape such as adding showers and toilets to the guest rooms. Some were considering additional marketing and scaling up their business, but the majority had other full-time employment (mainly as small business people within the trades sector). These lodge owners stated they only get a small number of guests or groups a year and are not sure of how much more they want to invest in their fishing lodge.

The majority of lodges are relatively close to Yellowknife with less than a 40-minute flight to their lodge. The introduction of the new 185 and 206 Cessna service was cited by many small to medium scale lodge owners as a welcome addition in order to facilitate smaller groups.

These small scale lodge owners suggested that the “do-it-yourself”, self-catered lodge is becoming more popular. By keeping their overhead low and renting out the entire facility, they are able to keep the price low and make a small profit.

Many of these small scale lodge owners participate in little traditional marketing. Only a few have operational websites and they primarily rely on word of mouth, repeat business, visiting friends and relatives, or use it as a personal fishing lodge for their immediate family.

The 2004-2005 Visitor Exit Survey stated that the client base of small lodges were mainly Canadian at 64%, with the remainder being American. Given the decline of the US market since 2005, the percentage of Canadians traveling to small lodges is anticipated to be significantly higher<sup>9</sup>. Lodge owners spoke of the importance of the Canadian market to draw from with a significant portion focusing on the Alberta market.

*“I am as busy as I want to be. I don’t promote and have no marketing. I am not run flat-out, people keep coming back, business is good with a low number of clients.” Small Scale Lodge Owner*

*“Smaller lodges like to keep it to one group at a time and not mix with others. They have the run of the place and like to do everything themselves.” Small Scale Lodge Owner*

*“Some lodges used to have guides, now they don’t offer it anymore. It keeps the overhead low and they can pay extra if they want it.” Small Scale Lodge Owner*

The major difference between small scale and medium scale lodges is the level of service and amenities offered to the anglers. A medium scale lodge might offer a combination of three meals a day, a full service bar, Internet, guiding at an extra cost (or assisted guiding<sup>i</sup>), and some small luxuries like a wood fired hot tub or sauna.

A number of lodge owners spoke to their specific lodge “culture” and how they have a comfortable, laid back, family feel. Clients are welcome to fish at their own pace and on their own schedule. One medium size lodge owner referred to their target market as the “upper middle class” and not the pampered high income angler. Clients interviewed spoke to a sense of belonging, comfort, great cooking, the simplicity, the relaxation, the camaraderie, the great fishing and the need to come back year after year.

The fishing product at small and medium scale lodges is not considered a trophy fishery for Lake Trout. There is the potential to catch a trophy fish (loosely described as a Lake Trout over 20 pounds), however, the average Lake Trout consistently caught is between three and 10 pounds. Northern Pike fishing is different and can feature consistent catches of 40 plus inch trophy fish.

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<sup>i</sup> Assisted guiding was having a guide available at the lodge or on the water to watch multiple boats or parties, or to help anglers requiring extra assistance.

Many of the medium scale lodges are actively marketing their product with some attempting to differentiate and find niches for their particular product. An examination of NWT lodge marketing materials identified a series of medium scale lodges that focus on such niches as Northern Pike fishing, fly fishing or families.

Some medium scale lodges are doing a great job bringing out the excitement in their particular fishery marketing tactics such as “ice-out Pike”. Medium scale lodge owners spoke to the fact that they are also finding new lakes for clients to fish for additional species to keep it interesting.

Many medium scale lodges are providing a quality product at a mid-range price point. They are trying to be competitive in the marketplace catering primarily to the Canadian market. Lodge owners speak to the large number of Albertans that are frequenting their product.

While this has provided a value offering in the NWT it also places them in direct competition with the fly in lodges in Northern Manitoba, Northern Alberta, Northern Saskatchewan and Northern Ontario.

*“There is nothing fancy about it. The hot tub is the only luxury, cooking is good, they are nice people, I feel welcome, like a part of the family.” Angling Client*

*“I like the idea of a middle of the road lodge, I have even fished all over the world. I don’t like big and fancy, rather homey, small, variety of species and a limited number of people.” Angling Client*

### **Large Scale Lodges**

Large scale, “full service” lodges have been the backbone of the NWT fishing industry and marketing for decades. Pictures of record trophy Lake Trout caught in Great Slave Lake or Great Bear Lake have helped to build awareness of the NWT as a fishing destination. There are other large lakes with exclusive lodges that have offered a full service product and capture significant repeat business.

Large scale lodges often have private runways and can cater to large groups of up to 45 guests. Some lodges offer full amenities to a higher end client with a focus on quality and service. These lodges market a staff ratio of 1:1, maid service, laundry, Wi-Fi, phones, full service bar, sauna, hot tub and more.

There are also large scale lodges that don’t offer five-star service; rather they provide a more rustic experience positioning their exceptional fishing opportunities within a striking northern landscape. Many of these lodges offer

outpost camps to provide their clients with exclusive fishing opportunities in remote settings.

Regardless of the positioning, large scale lodges have always catered to more of the American market. The “American Plan” product, which is another term for full service and all-inclusive, made up 91% of anglers according to the 2004-2005 Visitor Exit Survey.

Large scale lodge owners spoke to the ups and downs in this market with the decline of American anglers. While still focused on Americans, some spoke to an interest in marketing more to Canadians in order to round out their business.

Most large scale lodges used to cater extensively to the corporate market in the 1980s and 1990s but have found this market to be much smaller today. Many large scale lodges have a long history, a loyal customer base, and often defined sales channels with sport fishing wholesalers and retail partners.

These large scale lodges are typically on larger lakes and feature a steady supply of big fish. These fish are often referred to as the true NWT trophy fish with Lake Trout at upwards of 60 pounds. These lakes are often large, unsheltered and demand a knowledgeable and trained guide.

There was a time when targeting trophy Lake Trout was the primary reason American’s would come. It was a simple model whereby anglers would be guided in a boat on a large lake and trolled for trophy Lake Trout.

Things are changing now whereby the large lodges are trying to work with anglers to get them to try new tactics (such as fly fishing), new species (such as Northern Pike and Lake Whitefish), and come at different times of the year. By mixing it up with their clients they want to give them a new reason to come back or a new perspective on a familiar product and lodge.

*“Full service lodges stayed here and continue to provide excellent service, quality guiding, and offer a high quality infrastructure.”*

*Large Scale Lodge Owner*

*“There is the perception that all fishing in the NWT is a large lake, full-service, trophy fishery designed for the wealthy American or group of doctors or lawyers. This used to be the case but has changed.”*

*Medium Scale Lodge Owner*

## The Fishing

The challenge with marketing fishing product is that attributes can be very subjective. Size, quantity, and quality are subjective and shaped by the angler's previous fishing experience.

Many fly in fishing destinations throughout Canada market trophy fishing, steady action and healthy fish. Fortunately for the NWT, lodge owners state that NWT's fish are bigger, there are many of them, and they are healthy. This bodes well for the future of the NWT fishing industry, which cannot be said for most other jurisdictions that have more pressure, accessibility or proximity to urban centres.

### Size and Quantity

As has been mentioned before, NWT has large fish. These large fish are mainly Lake Trout and Northern Pike and to a lesser extent the relative size of Grayling and Lake Whitefish. There are lesser-fished species like Arctic Char and Inconnu, which are also large but are not a target species for many lodges.

While there are record breaking Lake Trout in the NWT they are only located on a few large lakes such as Great Bear and Great Slave Lake<sup>10</sup>. Many other lakes and lodges can offer the opportunity for a 20-30 pound Lake Trout, but they are not caught regularly. Many medium size lodge owners on smaller, sheltered, lakes speak to the consistent number of three to 10 pound lake trout also referred to as "shakers". Some clients and guides refer to catching 100 fish in a day as a regular occurrence.

*"The priority is to have steady action with smaller fish and then throw in a trophy." Angling Client*

*"All lodges have many fish, but the fishing is better in some than others." Lodge Owner*

*"Customers are happy if they catch many and keep trying to catch "the big one". Twenty pounds is a big fish in most lodges." Lodge Owner*

Trophy is a relative term, which makes it difficult to manage expectations for a destination. A particular lodge can market a specific size of fish, but for the overall destination marketing for NWTT, that is a more difficult prospect. Some lodge owners spoke to challenges of trying to deliver a product when they don't have access to the resource being marketed. Some small to medium scale lodges speak to the quantity of fish with the "possibility" of catching a trophy fish.

*“People won’t catch Lake Trout as big as we are marketing.  
So they are disappointed.” Lodge Owner*

*“We need to manage what we are selling. Maybe there was a group of eight  
and only one guy caught a 50 pound Lake Trout...we disappointed  
seven of them.” Lodge Owner*

*“You can’t say you have trophies unless you are on Great Slave or  
Great Bear Lake.” Lodge Owner*

Fortunately, lodge owners confirm that the Northern Pike fishery in the NWT offers consistent 40 plus inch trophies in a wide variety of locations.

Lodge owners mentioned how the market has changed and anglers are less interested in exclusively catching trophy fish and many are focusing more on the experience.

*“Things have changed since the 1980s and 1990s when they were coming only  
for trophy fish. In the last 15 years, there are half looking for trophies  
and half looking for the experience.” Lodge Owner*

The perception amongst lodge owners is that there a healthy number of fish and they are getting bigger as a result of the catch and release policies in the NWT since the 1960s.

## **Species**

A study of American anglers in Manitoba states that the majority of anglers start their selection of a destination based on the species they want to catch first<sup>11</sup>. NWT’s three major sport fishing species sought after by anglers in order of preference<sup>12</sup> are: Northern Pike, Lake Trout, and Walleye. Northern Pike and Lake Trout are prevalent in most parts of the NWT with Walleye featured in the southern portions of the territory. Other fish like Grayling and Whitefish are also prevalent, however, they are almost always a secondary choice for anglers.

### *Lake Trout*

Lake Trout are a prevalent, slow-growing, great tasting, fish found primarily in lakes in Northern Canada. The large size of NWT Lake Trout is well documented with the record at 72 pounds caught at Great Bear Lake<sup>13</sup>. Virtually all NWT lodges offer Lake Trout fishing with the average size three to 10 pounds. The large, deep lakes, prevalent food sources (like Herring), and low fishing pressure allow these fish to grow big and plentiful.

Lake Trout like cold water and often go deep when the temperature warms up in mid-summer. Lake Trout can be caught a variety of ways but the majority of trophy size Lake Trout are caught in deeper water by trolling large lakes with



lures or herring. Downriggers, weights or other diving devices are used occasionally to get lures down to the large fish. Most lodges mix up the Lake Trout fishing by jigging, fly fishing, trolling or casting over shoals. Lake Trout are often active biting on the shoulder seasons (spring and fall) when the temperature cools and during their spawn.

Lake Trout generally do not strike a lure or fly with the same aggression as a Northern Pike. Fishing for Lake Trout can be a relaxing angling experience with moments of excitement.

### *Northern Pike*

Northern Pike are ferocious, aggressive, toothy, predators that are found in large lakes, small lakes, rivers, weed beds and marshes. They actively cruise water feeding on various baitfish, terrestrials, and virtually anything they can fit into their mouth. Northern Pike strike with force and are particularly exciting when they can be seen in shallow or clear water taking the lure or fly.

Trophy Northern Pike are prevalent in the NWT with most lodges offering the potential to catch a 40 plus inch fish weighing in the range of 20 pounds. There are some world-class, productive areas within a short flight from Yellowknife. Outfitters and guides also speak to the incredible trophy fishing opportunities within Yellowknife as well. This makes up a large percentage of day fishing product.

There are many Northern Pike addicts that fish waters and travel exclusively for these trophy size fish. The fish in the NWT are consistently larger than those of what one would find in Minnesota, Ontario or Alberta. There are many lodges in Northern Ontario, Northern Manitoba, and Northern Saskatchewan that market consistent trophy Pike but all lodge owners, clients, and guides interviewed perceived that the NWT has bigger Pike.

There are a number of medium scale lodges that are actively marketing and positioning their trophy Northern Pike fishery. An example of this cited by lodge owners is the very successful annual Trout Rock Lodge Northern Pike fly fishing derby<sup>14</sup>. In the past decade, a number of large scale, full service lodges that typically catered to American Lake Trout fisherman have moved to actively pursuing Northern Pike as well.

*“There seems to be a bias towards either Trout or Pike. If they come from the West Coast where they have salmon they like Lake Trout. If they come from the mid-west, they like Pike.” Lodge Owner*

### *Grayling*

Grayling are a beautiful, iconic, northern fish that are often displayed in marketing materials. They are typically one to two pounds with a number being caught in

NWT fishing lodges in the three to four pound range. Pound for pound they are a hard fighting fish that take light tackle and fly rod and tippet combinations in dramatic fashion. Telltale aggressive takes with jumps and a massive dorsal make this an exciting fish on the fly for both experienced and beginner fly fishers.

Grayling are often in river systems allowing anglers a traditional river wading experience rather than the more traditional boating experience in lakes.

Grayling are an excellent fish to market for rubber-tire and regional marketing efforts, as they are often close to the road and accessible in many northern river systems. Unfortunately, Grayling on their own are not a target species for the NWT overnight lodge based anglers. They are considered by many as an “after dinner fish” or an afternoon affair on a four day trip after chasing Lake Trout and Northern Pike.

### *Walleye*

Walleye is considered a “utility” fish used to provide another fishing option when at an NWT fishing lodge. Canadian prairie markets and US Midwest anglers are familiar with Walleye fishing but it not their primary motivation for a long-haul fly trip to an NWT fishing lodge. Small to medium size lodge owners are providing Walleye as an option to mix it up or provide exclusive opportunities to catch a great quantity, in isolation, in a beautiful northern setting.

Tactics tend to be traditional with hardware casting lures or jigs. There is less of an interest and marketability in fly fishing for Walleye.

### *Lake Whitefish*

Lake Whitefish, like Grayling, are usually a secondary species that adds variety to a fishing experience. Lake Whitefish are also keen to take a small weighted fly and average around two and a half pounds. They have very small mouths and typically take the fly in deeper water with a wet line and indicator making it a more technical style of fly fishing. Some lodge owners are starting to key in on this as a value added experience for fly fisherman looking for a new challenge.

*“A Whitefish on a 5 weight fly rod with weighted nymph or on the surface is under-rated and very unique and exciting.” Angling Client*

### *Other Species*

Other unique species like Inconnu and Arctic Char are highly prized and marketable species. Inconnu, also called Sheefish or Connie have a reputation as the “tarpon of the north” and are highly sought after by fly fisherman. Inconnu are a freshwater Whitefish, can reach up to 70 pounds, and will take a fly or lure. The challenge is that, where they available, they are typically migratory and hard to access consistently for NWT fishing lodges. They are an exciting option for

day product operators and regional marketing initiatives as an exclusive fishing option.

Arctic Char are sought after and an extremely marketable fish. They are bright silver when coming from the ocean and can reach a bright orange during their spawn. They are often caught with flies in remote rivers along the northern coastal river offering a unique Arctic fly fishing experience. There have been instances when Arctic Char have been used as a banner fish for NWT marketing materials. The imagery drives inquiries and builds awareness however the product offerings are so limited it is difficult for lodges to deliver on this position.

*“Arctic Char are difficult to find in the NWT. We are not Arctic Lodges.”  
Lodge Owner*

Overall, the varieties of fish offered in the NWT are a selling feature. Some lodges have marketed this through special promotions like: Fly fishing Northern Pike Derby, Whitefish Derby, 20/20 or 30/30 clubs<sup>ii</sup>, and a Grand Slam<sup>iii</sup>.

## Tactics

Tactics vary across lakes and lodges and are often determined by the conditions, guides, and species being sought. As was identified in the previous section, there are common tactics used to catch particular species.

A concern raised by a few lodge owners and a guide was that the NWT is perceived as being very traditional with little innovation in fishing tactics. A traditional tactic may include the trolling of weighted lures for hours to catch a trophy Lake Trout. Lodge owners interviewed still had large percentages of hardware fishers<sup>iv</sup> and fewer fly fishers. One small scale lodge stated that their clients were 95% still fishing with hardware and 5% fishing with fly rods. Another large scale lodge owner stated they have been pushing fly fishing over the last few years and are now 20% fly fishing dominant, 30% hardware dominant and 50% do both.

Hardware fishing does not have to be considered traditional. There are numerous new technologies, lures, jigs and baits in the fishing industry.

*“Most NWT Lodges are not selling and delivering an exciting fishing product even though it exists. They are all selling the same thing.” Lodge Owner*

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<sup>ii</sup> 20/20 or 30/30 club challenges anglers to catch a Pike and Lake Trout at 20 or 30 pounds respectively.

<sup>iii</sup> The Grand Slam at different NWT lodges can include a combination of 4: Northern Pike, Lake Trout, Grayling, Lake Whitefish, Walleye, or Arctic Char.

<sup>iv</sup> Hardware refers to anglers that use a rod with a bait casting, mooching or spin reel. The reel is fixed with a monofilament or braided line and then fixed to a swivel with a metallic or plastic lure. Lures may include: spoons, spinners, or jigs.

Some fishing lodges were actively mixing up their tactics and trying new lures and baits in order to bring some excitement back to the industry and have their product stand out. One lodge owner spoke to the fact that their guides are working hard to be innovative and find unique ways to find and catch fish. For example, his guides watch for birds feeding on baitfish and target this area to catch feeding fish at the surface.

*“NWT has been trolling for 30 years and need to find different ways of fishing, to make it more active, using new baits, working hard but not tiring. You feel like you have done something at the end of the day.” Lodge Owner*

*“Trolling for a Lake Trout with a guide is not as interesting as it used to be and I don’t enjoy hauling them up from hundreds of feet.” Angling Client*

In the fishing industry traditional tactics are not as marketable in an increasingly competitive marketplace. Anglers have access to the Internet, fishing TV shows, and magazines that market exotic species, innovative and exciting tactics.

Fortunately, the NWT has the opportunity to market some key species with some innovative and exciting tactics. These include:

- *Ice-out Northern Pike*. Northern Pike feed heavily after the winter and getting on the water early after ice-out is an exciting experience that can also extend a lodge season.
- *Northern Pike on the Fly*. A well known species and tactic combination and the sole objective of many anglers. Large Northern Pike flies used on the surface within weed beds or along shoals brings forth adrenaline filled strikes.
- *Sight Fishing for Large Lake Trout or Northern Pike*. This is also a common tactic and can be compared to that of fishing for Bonefish in the Bahamas. The guide positions the boat quietly (often with motor off) where anglers can see moving Lake Trout or Northern Pike and then tempts them with a fly or lure to watch the entire chase, ambush and hook-up unfold before their eyes. Lake Trout sight fishing is more unique and uncommon to that of Northern Pike.
- *Lakers on the Surface with Terrestrials*. This is unique and not available everywhere. It is possible in the NWT under the right conditions. Fishing flies are tied to imitate terrestrials such as grasshoppers, large beetles, ants, dragonflies, bees, and also frogs. These flies tend to be large and often made of foam that keeps them on the surface. Lake Trout will not want to miss this protein packed meal, inducing a strike with voracity. The

angler has to watch intently and set the hook quickly before the fish spits it out.

- *Northern Pike on the Surface with Terrestrials*. This is also a well know species and tactic combination. With their large mouths, aggressive nature Pike will often hit these consistently. Often fly fishers will cast into weed beds and imitate a fleeing or struggling terrestrial by stripping the line back to the rod. A sleeping Pike may awaken and launch themselves at the fly; which is another adrenaline filled angling experience.
- *Fishing the Spawn*. Fish feed more actively prior to spawning in order to build up energy or to aggressively protect their territory. This is the case for most fish but especially noticeable and accessible for Lake Trout. Lake Trout will often find gravel patches along shoals or shallow areas. This often allows anglers to see concentrations of them<sup>v</sup>.
- *Fishing the Shoals*. This includes aspects of sight casting but can also be done by boat around islands and in areas where there are dramatic shoals. Anglers need to keep a look out for cruising fish and baitfish coming in and out of the deeper areas. Casting along a shoal or into the deep from a shallow area is a common tactic and often results in an exciting and unanticipated strike.

*“It is a thrill to be able to sight cast to fall trout on the edges of a lake that were spawning or large Pike sunning themselves in the shallows.” Angling Client*

## Trends

There are some notable trends in the fishing industry that are having an impact on the marketing of the overnight sport fishing sector of the NWT.

### *Fishing is Declining*

The demand for overnight fishing packages in Canada has significantly declined, as has the total number of anglers (declining 11% since 1995 and 3% since 2000<sup>15</sup>). There was an average decrease of anglers in Canada by 9% between 2005 and 2010 more than double the percentage of previous years<sup>16</sup>.

The Recreational Boating and Fishing Foundation (RBFF) in the United States reports that while fishing is still one of the most popular nature based activities it is losing market share. They refer to the “leaky bucket” scenario in recreational

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<sup>v</sup> Fishing the spawn must be managed and done with care, as this is the time when the fish are working to re-populate and are particularly vulnerable. Intensively fishing the spawn in the same area can significantly harm a local population of fish.

fishing where new participants are joining at 18% per year with participants dropping out at 19.4% per year<sup>17</sup>.

There has also been a reported decline in consumptive tourism, which is being linked to a global decline in fish and game stocks<sup>18</sup>. This presents an opportunity for the NWT where the resource is still healthy with little fishing pressure.

Naturally, a declining angler base is a threat to industry. Fewer anglers mean a shrinking customer base. With a very small internal (resident) fishing market to draw from, NWT is almost entirely dependent on external visitation.

### *Anglers are Taking Shorter Trips*

Lodge owners confirm that anglers have less leisure time and are requesting shorter trips. It was standard in the industry to offer 7-10 day trips in the past. Now a four-day trip is a norm and many offering two to three day packages<sup>19</sup>. The small to medium scale lodges spoke to the additional smaller airplanes that will now allow them more flexibility in delivering custom and shorter fishing trips to their lodge.

### *Shift from the American Market to the Canadian Market*

There has been a drastic shift from guided American anglers to that of Canadian. In 2002 according to the Visitor Exit Survey there were 55% American to approximately 45% Canadian anglers. In the 2010-2011 Visitor Exit Survey this number has changed to a mix of 22% American and 73% Canadian.

### *Anglers are Continuing to Age*

Anglers that purchased overnight sport fishing packages have always been older<sup>20</sup>. They may have been retired, had the disposable income and had the time to fish every year. These anglers continue to age with the average age being older than 55. The 2010-2011 Visitor Exit Survey states that 52% of guided fishers are between 45 and 64 years old with 12% being 35 to 44 years old<sup>21</sup>.

This is a threat as the aging population of baby-boomers continues to age and the majority of lodges rely heavily on this demographic<sup>22</sup>.

Research also suggests that the relative percentage of Canadian anglers 65 years old and older almost doubled in 2010, compared to 2005 from 6% to 11%<sup>23</sup>.

*“Repeat customers like to go with the same guide but they are dying off and we don’t see the younger 40’ish guys taking their place.” Lodge Owner*

*“The older guys are not dying yet. There are still plenty out there*

*and we don't need them all.” Lodge Owner*

### ***Anglers are Becoming More Price Sensitive***

At one time anglers were wealthy, sophisticated, boomers that wanted all inclusive packages with luxury accommodations and fine dining. They were getting older, making more money and looking for an escape from everyday life<sup>24</sup>.

With the downturn of the economy and the resulting fewer American anglers, lodges had to keep their prices in line in order to remain competitive. One large scale lodge owners suggested that their prices should be raised but they have to keep them down due to the fragility of the US economy. Some lodge owners have seen large scale lodges reduce their prices and suggested it has lead to their demise.

In current expenditures package prices have fallen by almost 19% when compared to that of 2005. In 2008, the package price's share of total expenditures fell by almost 16%<sup>25</sup>.

Furthermore, research suggest that those looking for a deal are more likely to be Canadian with females being more price sensitive than males<sup>26</sup>.

### ***Nature of Repeat Business***

Anglers are creatures of habit, many of whom like to book the same time each year, with the same group, and fish in the same spots. Lodge owners estimate that they received anywhere from 70-90% repeat business. They went further to suggest that much of their new customers are anglers coming from existing groups. This reinforces the important of word of mouth, testimonials and referral business in marketing the overnight sports fishing sector.

One lodge owner stated that the fishing experience changes for repeat anglers. When they come for the first time they are in search of big fish and the second time they are looking for the experience.

*“I am addicted to my trip to the lodge each year. I don't even fish that much anymore. I would rather put others onto fish.” Angling Client*

*“There is loyalty, I have had clients coming back for 17 years in a row.” Lodge Owner*

The nature of repeat business has changed, anglers are no longer coming to an overnight sport fishing lodge every year. Lodge owners confirm that many anglers are coming bi-annually or every three years. This has implications, as it

requires each fishing lodge to market to and then book more customers each year in order to maintain the same level of business.

*“There are 20% of new anglers in returning groups, with some now returning every two to three years.” Lodge Owner*

Many lodge owners speak to the power of the Internet in providing other travel options for anglers. These options include fishing in other exotic destinations or taking other leisure holidays. One lodge owner suggested their clients like to fish saltwater one year and freshwater the next.

*“There are so many other options out there now with the Internet, we are competing with ski hills, cruise lines, and lodges in Brazil.” Lodge Owner*

*“The culture of coming back every year is no longer, maybe a family comes occasionally, now it is a “bucket-list” experience and they try something else.” Lodge Owner*

The research also suggested that anglers are taking longer to plan their trip and have a shorter booking time. In the past they would plan their trip approximately one year in advance<sup>27</sup> are now they are taking up to two years to plan. They would also book within six to 12 months and now are booking within five months<sup>28</sup>. This means lodges have to keep top of mind for the clients for a longer period and also provides less certainty on numbers until closer to the season.

### *Importance of Catch and Release*

The majority of lodges have strict catch and release policies, often coupled with other restrictions like single barbless hooks. Most lodges catch smaller Lake Trout or Northern Pike for a shore lunch but anything greater than 10 pounds is returned. A smaller proportion of small to medium scale lodges permit anglers take one to two fish home depending in some cases on the freezer space available.

Some lodges go even further by training their guides on the newest catch and release technique (i.e. cradles).

*“We ask our guides and clients to look the fish in the eye, value and respect that fish you just caught.” Lodge Owner*

Clients interviewed appreciated the catch and release policies and one stated he would not come to the lodge if they were not in place. Great quality replica mounts are also now available from a photography and standard measurement.

*“Catch and release policies are good and keep the ‘meat hogs’ from coming in.” Angling Client*



## *Importance of the Albertan Market*

Currently, the majority of inquiries to the NWT are coming from Canada with the majority from Alberta and then Ontario. Specifically, Alberta inquiries are coming from Calgary, Grand Prairie, Fort McMurray and Red Deer<sup>29</sup>.

Many lodge owners confirm they are seeing more anglers from Alberta and are benefiting from the proximity of this market. Some lodge owners pointed out that it is possible for anglers to leave Calgary and be at the lodge within the day.

A number of medium scale lodges are actively marketing themselves to Albertans, in particular to those lodge owners that have connections or work in the “oil patch”. Even some of the large scale lodges that have typically focused on Americans are beginning to look at Alberta as a draw.

*“It is easy to get to Yellowknife from Calgary. I get there in a few hours have a few beers, a few laughs and get on a float plane first thing in the morning. It is possible to get in and out in the same day.” Angling Client*

Lodge owners also stated that Albertan anglers tended to be more price conscious and were more interested in a “do it yourself” product rather than full service. Research conducted in Edmonton stated that there is a perception that the NWT Explorers Guide focused on the high-spending, fly in, American market<sup>30</sup>.

*“It doesn’t cost that much to fly out of Yellowknife into a lake 20-30 minutes away and camp there for days to be picked up again.” Angling Client<sup>31</sup>*

Albertans also provide a major opportunity for independent driving based angling, day outfitting and regional marketing. They make up the large majority of NWT’s independent anglers<sup>32</sup>.

## **Niche Markets Segments**

There are numerous of niche segments being marketed to in the fishing industry today. This research identified a few segments of interest that were identified by NWT lodge owners.

### **Women**

Numerous studies point to the largest growing segment in the recreational fishing sector as women<sup>33</sup>. The RBF in the US has done extensive research into woman and fishing and estimates that there are 69 million women fishing in the United States, many of who have moved into the “lapsed” category more than over a year ago<sup>34</sup>. The barriers cited for this were largely access and skill. They

go further to suggest that their interest is real and that marketing efforts targeted at them can work. This shows that there is untapped demand, and a mainstream industry that is not there yet in supporting them.

The Canadian TAMS research also identified a large segment of women that are active travelers and enjoy outdoor adventure activities<sup>35</sup>.

NWT lodge owners spoke to an increasing number of women traveling in groups or husband and wife, boyfriend and girlfriend parties. Many lodges are also trying to keep non-fishing spouses entertained with dedicated programming, experiences and infrastructure would interest them (i.e. reading areas, hiking trails, massage therapy, etc.).

*“We are seeing many fisherman bringing their wives and fishing with them.” Lodge Owner*

## Families and Children

Similar to that of women and fishing, fishing families are also a high growth area as identified by the US based RBFF. There has been extensive research on first time anglers and identify that families that are fishing together are young families with mid to upper incomes and young children<sup>36</sup>. The same research identified that young children aged 6-12 have always been a large growing segment for first time anglers in the US. The challenge is retaining them and motivating them to take an overnight trip to a sport fishing lodge.

One small scale lodge owner specifically stated they he does not encourage families with younger children as there is nothing for them to do and there are safety concerns in getting them out if something were to happen. The majority of NWT lodges are actively marketing to families and offer price incentives (i.e. half price for the kids) in order to attract families.

*“They are the future of our sport and business. We offer incentives to get them here.” Lodge Owner*

*“We are trying to target younger families and sell them on the kids. Seeing lots of father son groups and multiple generations.” Lodge Owner*

Interviews suggested that NWT lodge owners were aware that they needed to attract younger anglers to accompany their loyal, yet aging, demographic. One common strategy was to focus on the multi-generational trip and actively recruit older anglers to bring children and grandchildren. Lodge owners stated that multi-generational trips are an important segment for lodges as: it targets an already converted loyal customer, offers a new experiential take on the fishing experience, and expands their customer base<sup>37</sup>. Interviews suggested that it is still largely father and son, with very few father and daughter combinations.

*“Some of them bring their families but it is still one older guy paying for it”. Lodge Owner*

*“I brought my son and talk about reliving the experience again through his eyes. His first float-plane ride, eating caribou stew, driving a power boat, seeing the Northern Lights for the first time.” Angling Client*

## Fly-fishing

It is debatable whether fly fishing is still considered a niche sport fishing activity. With the exception of large Trophy Lake Trout that lie deep in the mid-summer, fly fishing is exceptionally well suited to the NWT. Many lodge owners have embraced the fly fishing market, actively trying to promote it through fly fishing media (like the *New Fly Fisher*), making investments to satisfy this market (i.e. casting platforms, flat bottom boats, and fly tying stations) and hosting fly fishing derbies.

There are approximately 45.4 million anglers in the US, with 1.6 million that fly fish only and 5.5 that fly fish and use other techniques<sup>38</sup>. The same research suggests that there is growth in this market relative to other techniques with 14.9% of new anglers in the US trying fly fishing. NWT lodge owners also stated that this market likes to: travel more frequently to fish, they travel farther from home, they have more money, and they are easier to satisfy in that they don't need trophy fish.

*“Fishing for 12-15 pound Pike on a fly rod never gets boring.” Angling Client*

There are more fly fishers on the West Coast of Canada than in the central and eastern Canada. There is also considerable competition for fly fishers with many taking a winter overnight lodge fly-fishing experience in the tropics (i.e. Bonefish in the Bahamas).

*“We try to help convert our hardware fishers to fly fishing. We move them from part-time fly fishing to full time. It gives them another reason to come and opens up the experience again.” Lodge Owner*

*“Fly fishers used to just come for ice-out Pike, now they coming at different times too.” Lodge Owner*

## Corporate Market

The corporate market was once the “bread and butter” for NWT's overnight lodge industry. There were groups of 10-20 people, that might come year after year with one person paying for all it. This market dropped dramatically given the economic downturn, the restrictions on tax write-offs and the fact that fishing was not considered a gender neutral activity for companies.

While the corporate market is down there are still some NWT lodges that are catering to this business. Medium to large scale NWT lodges confirmed that there are smaller groups (4-8) persons that are coming from Yellowknife, Calgary and Edmonton and looking for a team-building experience. One medium scale lodge owner has had the same corporate relationships for a decade and exclusively caters to the corporate market today.

There were a few medium scale lodge owners that cater to corporate clients in the trades and oil field sector. These lodge owners have secondary businesses and use their client base (mainly in Alberta or Yellowknife) to drum up business for their fishing lodge.

## Geographic Markets

This section will provide an overview of the Canadian, American and the foreign market as they relate to the overnight sports fishing sector.

### Canadians

The Canadian market has grown in terms of overnight fishing trips. The major Canadian markets for the NWT are Alberta, Ontario, British Columbia and Saskatchewan. The 2013-14 NWT marketing plan states that due to the recession Canadians are looking to travel closer to home.

Relative to the Canadian pleasure traveler, 17.6% or 4.3 million Canadians fished while on an out of town overnight trip of one or more nights. They are predominantly male and over-represented in the 35-44 year old category. They have the fifth lowest household income and third least likely to have a university education of the 21 outdoor types<sup>39</sup>.

An interesting demographic change also occurred with guided anglers in the NWT as it relates to education and profession. In 2002 those with University degrees made up 70%; in 2011 this had changed to 24%. In 2002, 69% listed their employment as professional and management; in 2011 this had changed to 42%. This suggests a change in the type of client with the big shift from the professionals and corporate groups (Americans, full service, all inclusive) to a more “meat and potatoes” mixed grouping of Canadians. One can extrapolate further and suggest this is the larger representation of the oil patch and trades related clients coming from Alberta.

It is obvious to say that with a small population, the internal Northwest Territories market does not play a major role in medium and to more of an extent large scale lodges. Small scale lodge owners confirmed there is a small local market as part of a “do it yourself” experience.

*“Canadians want to guide themselves. They want a lesson or two and then they are on their own.” Lodge Owner*

*“Right now we are 75% local business for small corporate groups, some visiting friends and family and a couple of groups from Edmonton.” Lodge Owner*

## United States

It was previously mentioned that the market has dramatically shifted from the US market in 2002 towards the Canadian market today. Research confirms that Americans traveling for one or more nights of fishing and hunting has been declining since 2001 dropping by half from 1.8 million in 2001 to 939,000 in 2011<sup>40</sup>.

The NWT’s proximity to Minnesota and Illinois and the sheer number of anglers in the US still make this a primary market for the NWT. The geographic composition of the US market has not changed considerably with the majority of American anglers visiting the NWT come from: Minnesota (20%), Illinois (20%), Colorado (9%) and Texas (9%)<sup>41</sup>.

There are still more than 45 million Americans that fish; which represents approximately 16% of all residents over the age of six<sup>42</sup>. More Americans still fish than play tennis (10.4 million) or golf (24.4 million) combined<sup>43</sup>. They average 20.4 fishing days a year, tend to like overnight fishing trips of up to eight nights.

Further to this the Canadian Tourism Commission TAMS research suggested that American anglers were more likely to stay in remote accommodations (fly in lodge or outpost camp)<sup>44</sup>. The same research stated that in 40.9% of American visitors to Canada came for the sole purpose of fishing within the past two years.

The NWT 2013-2014 marketing plan goes further to state that Americans are interested in the NWT’s beautiful scenery, unique character and lifestyle, sampling local flavours and taking in northern icons (i.e. bush planes, midnight sun, Aurora).

*“A visit to a fishing lodge is an American tradition.” Lodge Owner*

Some lodge owners, mainly of the small to medium scale, expressed a lack of interest in the American market. This was in part because they perceived they did not fit into their “lodge culture”. Americans were seen by these lodge owners as demanding, wanting only trophy fish, requiring full service, and a fishing guide.

*“I am not really interested in the US because we are not marketing a big trophy lodge.” Lodge Owner*

*“People from the states want to pull out a trophy fish and this is better on the East Arm. They also want an American plan.” Lodge Owner*

## Foreign Travelers

There are many foreign anglers that travel to fish for species all over the world. The Scandinavian countries are passionate about Northern Pike and the British are keen on Grayling. One fishing guide who has connections in the European fishing scene confirmed that markets like the French would be amazed at the Northern Pike trophy fishing in the NWT. The volume of 40 plus inch Pike that could be caught in a day in the NWT would rival what they might catch in a year after putting in a great deal of fishing effort.

While there are many European markets that would have an interest in the NWT fishing product, delivering it to their satisfaction is another matter. The same guide states that they are very particular and have high standards about tactics (i.e. French despise trolling), catch and release, equipment, guiding and infrastructure. This may require some additional thought and investment and may be a challenge for an operator that is accustomed to exclusively a Canadian and American clientele.

Currently visitation from foreign anglers to the NWT is approximately 3%<sup>45</sup>. It becomes less a question of a product market match and more of an individual business decision. For the NWT destination as a whole to try to build awareness and drive inquiries from a specific foreign market; this might not be a good investment. It becomes more of a personal business decision for an individual lodge that wants to attract this specific market.

If the overall marketing for the overnight sports fishing sector improves and results in more inquiries at the lodge level, it is anticipated that foreign markets will become aware and will inevitably inquire in small numbers through traditional marketing and sales channels. If there is traction in a particular market and an individual lodge wants to attract their business, there are specific magazines and publications that can be solicited for stories or the NWT general sales agents in those markets may be able to provide support.

## Marketing Approach

### Spectacular Brand and the Integrated Marketing Approach

The NWT's approach over the past three years to focus on the "integrated marketing approach" with the *Spectacular* brand makes perfect sense in terms of overall destination marketing efficiency and general awareness with limited resources. The approach works well for most day product in Yellowknife and the larger, accessible communities. This approach and brand can be leveraged across multiple target markets (including rubber tire, MCIT, and VFR) in both the winter and summer.

Unfortunately, this approach does not work as well for the overnight sport fishing sector. The switch from sector-based marketing to the integrated approach with icon attractions (1. Aurora and Winter, 2. Lakes and Rivers, 3. Parks and Wilderness, 4. Culture and People, and 5. Northern Realities), places them with the other sectors and results in a marketing gap. Lodge owners offered the following comments:

*“Two years ago we got into icons and images and we have seen results, but unfortunately it left us with no clear image of fishing and it got lost.” Lodge Owner*

*“The marketing program is not robust or focused on anything, we have not seen many targeted ads at fishing.” Lodge Owner*

While overnight sport fishing technically fits into the “Lakes and Rivers” category, anglers only have so much patience for traditional marketing approaches<sup>46</sup>. Anglers are discriminating and can spot something as out of place and not authentic right away. For example, the way one holds a rod, handles a fish, the clothing they are wearing, are all sub-consciously processed and can factor into the credibility of the destination. Image rich ads pique interest but don’t command serious attention when trip planning.

### **Anglers Path to Purchase**

The angler’s path to purchase is different than that of the Canadian Tourism Commission<sup>47</sup> or the traditional long haul leisure traveler. The overnight sport fishing angler has a much shorter path to purchase where preliminary destination research is undertaken and then the angler is looking to hit their list of drivers (i.e. species, size, tactics, infrastructure and accessibility) right away. If these are met they will get into detailed trip-planning right away. In addition, the path to purchase is shortened given most anglers are influenced largely by word of mouth from a credible source.

The traditional long haul leisure approach whereby the consumer is moved by a call to action within a publication or online, orders a vacation planner, “creates the movie”, etc., is not going to work as well for the overnight sports fishing industry. Once the NWT is on the overnight sport fishing angler’s radar, all fulfillment materials, inquiries (either email or call-centre) must be ready to have a specific angling conversation. Anglers want to visualize their trip down to the last detail – they want to be confident that their planning takes into accounts all eventualities including fishing tactics, weather and location. There are few general inquiries with general responses permissible in this sector.

### **Type and Quantity of Information**

As was mentioned, anglers have a condensed path to purchase with trip research and planning occurring immediately after generating awareness.

Specific information they require includes: species (including size and quantity), tactics, lure choice, weather conditions, detailed maps, types of boats used, lodge amenities and services and much more. Information should be available in destination's fulfillment material, websites, or can be answered through the call centre.

NWTT and the lodges need to provide as much information as possible early in the process and then answer any follow-up questions via email or phone direct with the consumer.

There needs to be clarity with respect to the destination awareness role of NWTT and the hand-off to the lodges to convert the sale. If the destination pitch is too general and there is not detailed enough to satisfy an angler, the lodge must fill the gap or the prospect will disappear.

### Key Influencers and Sales Channels

A recent study in Manitoba states that 91% of American anglers are most influenced by word of mouth<sup>48</sup>. More specifically, trusted friends and family that have direct personal experience with a proposed fishing destination<sup>49</sup>.

Research suggests that first time anglers, fishing in small parties of on to two are likely to use the Internet as their primary source of information. Larger groups, greater than five, are likely to be influenced by word of mouth. The Internet is less likely to be used by repeat visitors already converted to a particular fishing destination<sup>50</sup>.

When making a purchase decision, anglers are less likely to book an overnight sport fishing package over the Internet and to book with online forms. Email and phone are still a traditional way of doing business in this sector.

*"The website does not close sales for us. It drives contacts and inquiries. We have a 75% close rate if we make personal contact with the person." Lodge Owner*

Digital media is popular among anglers. Research suggests that 65% of anglers in Canada found their vacation on a website, 51% visited a tourism organization website and 70% used the Internet to book accommodations, with 18% using the Internet to book package deals<sup>51</sup>. Mobile technologies are also becoming increasingly important with 40% using a mobile phone to plan outdoor recreation, with 35% using it to share their experiences<sup>52</sup>.

An interview with NWTT Digital Media agency Think! Social Media confirmed that the aging demographic does not mean that they are not using social media. They are becoming social media savvy and are increasingly using it to share their vacation experiences with friends and family.



Given the importance of word of mouth and credible testimonials to anglers, social media can be a useful tool. It provides a platform for current, loyal customers to share their insights, recommendations, photos and stories to friends, families and other anglers.

Other sources of influence include reputable industry articles in fishing publications, celebrity endorsements, fishing TV shows, online forums or bulletin boards<sup>53</sup>.

## Marketing Audit

It must be noted that the NWTT does an incredible amount with a very small marketing budget. It is not the intention of this research to present numerous new marketing initiatives, as this is not a reality given budget limitations. Rather this research attempts to look at what has been done in an effort to identify any gaps and make improvements. This audit provides an overview of: general print materials, the consumer website, social media/digital marketing, consumer shows and cooperative advertising.

### Print Materials

Print materials for NWTT include the *Spectacular* Vacation Planner, the Fishing Guide and general print advertisements.

#### *Vacation Planner*

Vacation Planner is the main fulfillment piece for the majority of travelers thinking of traveling to the NWT. It is a broad piece that supports the integrated marketing approach and the *Spectacular* brand. It is more generic in nature and was not developed to provide anglers with detailed trip planning information. Most anglers looking for an overnight sport fishing experience would not find enough detail in this to assist them in making a destination decision. The planner works well for day product, regional marketing and rubber tire related angling experiences.

#### *Fishing Guide*

The *NWT Fishing Guide* is the fulfillment piece designed specifically to provide more detailed information for anglers. It is available in print as a mail out and for consumer shows as well as in electronic format as a download. While it has considerably more information than the Vacation Planner it cannot be considered a trip planning tool for overnight lodge based anglers.

As was mentioned, anglers need detailed and specific information immediately after the inquiry. The *NWT Fishing Guide* in its current format does not satisfy this. It is attractive and image-rich but could do more to move anglers along the

path to purchase. One issue is that it has very little information as a “fishing guide” and operates more like a “lodge guide” with simple listings. As was mentioned in the previous section, a true “fishing guide” would include such items as the regulations, access, detailed maps, locations, lures, weather, and prices.

Another issue is that the listings are not segmented, and do not provide enough information for anglers looking for a specific type of lodge, specific kind of fishing experience or targeting a particular species. The *NWT Fishing Guide* provides listing with a short description, which does not make it easy for an angler to hit their specific “drivers”.

Photos, ratings systems, list of amenities, icons with prices, species offered should be presented in a clear and consistent way. It does not distinguish between small scale “do it yourself” lodges, medium scale and large scale full-service lodges. Without more descriptive, categorized and formatted lodge listings, the angler does not have a seamless transition to a potential fishing lodging matching their interest. Rather there is an information gap, which means they have to search through various lodge websites in order to, hopefully, find what they are looking for.

The *NWT Fishing Guide* does an excellent job of presenting the diversity in the NWT angling product and not just the trophy Lake Trout fishery. The photography while diverse in presenting gender and species has some issues that will be noticed by the discriminating angler. Some photos do not adequately represent the realities of the overnight sport fishing sector. Examples include: the front cover, where the angler is wading in pants rather than waders, and pages 6 and 7 where boats and motors are dated, the angler is fishing in pants and the “rubber booted” ice fishers wearing jeans.

### *Print Ads*

The print ads recently featured in fishing magazines and in campaign, such as the recent *Globe and Mail* ads are attractive and attempt to provide more of the experiential elements rather than just trophy fish. This has improved from the past where standard ads featured older men, holding large Lake Trout.

Unfortunately, the *Globe and Mail* ads are still somewhat leisure oriented and general in nature. The ads should feature some of the strategic insights highlights in this research, follow the photo protocols, and feature key information such as: where was the species caught, size of the fish, and the tactic used to catch it.

Past research in a variety of markets on NWT related fishing ads identified that there needs to be a diversity of anglers represented (men and women, and families). The same research suggested that there was boredom in much of the market testing with the traditional trophy shot<sup>54</sup>. Furthermore the ads needed to convey the unique attributes of fishing in the NWT.

## Cooperative Ads

Lodge owners were asked if they would support cooperative advertising. The vast majority stated they would work together if they believed it would result in more business<sup>55</sup> and “grow the pie”. Lodges were also clear that it had to reflect their particular product in terms of how they position their experience, the species and the infrastructure.

*“I would not go in on an ad when it features a day product or a lodge that can be reached in 10 minutes.” Lodge Owner*

Some lodge owners were critical of the generic, cooperative ads, such as the recent *Globe and Mail* advertisements. One lodge owner specifically mentioned they were not to the right audience and they did not see inquiries from it.

## Digital Media

### Website

The current website [spectacularnwt.com](http://spectacularnwt.com) is a general destination website with a section dedicated to overnight sport fishing. There is little detailed trip planning information dedicated towards anglers. Lodge listings are organized by “all-inclusive lodges” and “housekeeping lodges” as means to recognize differences between these two types of properties. This differentiation is positive as there is a difference between small, medium and large scale lodges that has been realized in the NWTT marketing.

The listings are not presented in an attractive and easy to understand manner. A running, unorganized list of information (i.e. species, services and amenities) for each lodge is presented which does not help with an angler’s decision-making process. Images for each lodge are small and could do more to highlight the experience. There are also listings that do not belong in the categories, which brings down the overall quality of the lodge listings.

### Social Media

The Twitter account [@spectacularfishing](https://twitter.com/spectacularfishing) (1,494 followers) is a great tactic with consistent content. One observation is that there could be more specific fishing related content rather than reinforcing the traditional lure material. Tweets supplemented by an angler could get into specific content that interests anglers. Examples of angler relevant tweets could include: lure choices, fishing tactics, seasonal variations in product (i.e. ice-out Pike and fall Trout spawn), fishing stories, and species information.

One critical aspect of success in the use of social media is to ensure there is a conversation between the destination (NWTT), the lodges, and the consumer.

This is happening to less of an extent with the destination pulling most of the weight and with a few lodges participating in social media providing some content. At the time of this research there has been discussion around an investment in fishing related social media that will attempt to boost content across multiple platforms.

There is another website for the NWT sport fishing sector called the *Anglers Hall of Fame* ([anglers.spectacularNWT.com](http://anglers.spectacularNWT.com)). This was an effort to generate consumer content through sharing pictures, descriptions and stories of fishing in the NWT. It is categorized by species and their relative size. It provides specific information around lures and tactics used as well as location. It is credible in that the anglers themselves post it. The challenge is that it stands alone and is not integrated into the other marketing activities. It has also not had adequate uptake by the lodge or outfitting industry and appears to be more a repository of resident anglers images and stories.

### *Consumer Shows*

Lodge owners were split on the effectiveness of consumer shows for the overnight sport fishing sector in general. It was common the past for lodge owners to attend multiple shows and to achieve success with them. Some commented on the fact that they are no longer getting the “best bang for their buck” and that visitors are less qualified and have so many other options to choose from.

The NWTT attends a variety of consumer shows, including Sacramento, Edmonton, Vancouver, Calgary and Toronto. There are efficiencies for NWTT with some of the shows in that they also market the outdoor adventure, general leisure sector in addition to fishing and hunting.

Lodge owners commented that they often choose Chicago, as they tend to feature a higher end angler with more disposable income. One operator stated they have had consumer show success in Minnesota with a dedicated sales agent that specifically knows this market. It was noted that consumer shows attended in the US should have materials in metric and in American dollars.

A number of owners currently attend and see value in the Alberta shows. There are a few operators that actively participating in or are considering industry shows in the Alberta oil field trades, manufacturing, service sector.

Research has suggested the quality of consumer show participants is going down and many consumers are switching to online channels for their information<sup>56</sup>. The research was not able to ascertain the quality of NWTT’s trade show presence, however, it highlighted that anglers or lodge owners should be present in order to be able to speak to their specific destination drivers (i.e. species, size, tactics, quantity, infrastructure, and accessibility).

## Competitor Analysis

The following jurisdictions were reviewed as direct competitors to the NWT: Northern Manitoba, Northern Saskatchewan, Northern Ontario, British Columbia, Alberta, Yukon and Alaska. In terms of number of fishing lodges, the NWT is a relatively small player with approximately 40 – 50 active fishing lodges. Other jurisdictions such as Saskatchewan with 118, and Manitoba<sup>57</sup> and Northern Ontario with 200 fishing lodges are the bigger players. All other destinations have a variety of fly-in lodges as well as a network of accessible, and often more affordable drive-in lodges.

In addition to the competitive review of print and web materials (Appendix A), a cursory review of other exotic destinations was undertaken and is presented in Appendix B. Information was gathered from industry association representatives, lodge websites, industry websites and print materials.

In reviewing the NWT's competition, it is apparent that all destinations present information for the overnight sport fishing sector initially through their traditional destination marketing brand. From this initial generic pitch, each jurisdiction drills down to satisfy specific requirements for overnight sport fishing sector to varying degrees. Those that move the angler along the path to purchase from the generic pitch, to targeted fulfillment materials and fishing website with detailed trip planning information were the most successful.

### *Northern Manitoba*

Northern Manitoba has a mature and sophisticated angling marketing program. A testament to this is the long-standing *Master Angler* program. The program is well subscribed by both resident and visiting anglers. Manitoba is continuing to invest in the program moving to an online record and submission process as well as a mobile app allowing anglers to document their experience in real time<sup>58</sup>.

Manitoba also has an individual within Government that is dedicated to the fishing and hunting market. This individual can answer angling specific comments by phone, email and mail and provides them with the appropriate fulfillment material. Manitoba also goes one step further with a fishing and hunting consultant that develops marketing campaigns and acts as a general sales agent.

Manitoba is starting to scale back on their consumer shows but still caters to the "low hanging fruit" which is the road-based circuit. This mainly includes Minneapolis with the two long haul markets Denver and Chicago as well. Manitoba does not get the same buy in from fly-in lodges so they tend to focus on selling road-based lodges.

Americans make up 12% of the market for Manitoba lodges. These are primarily from Minnesota and Wisconsin. An increasing number from Minnesota are driving approximately eight hours to Winnipeg and flying into lodges. The average American angler has been coming for the past 10 years with a return rate of 83%<sup>59</sup>.

*“A trip to Manitoba or Saskatchewan is engrained for the US market and it is tough to get them to shift.” Lodge Owner*

According to the American market, Manitoba has similar attributes to that of the NWT, that includes a high quality of fishing (53%), and abundance of fish (11%) as their top reasons for traveling.

The top three species most fished by anglers in Manitoba includes: Walleye, Perch and Northern Pike<sup>60</sup>.

### **Northern Saskatchewan**

Northern Saskatchewan has a similar product to that of Northern Manitoba, however they don't promote it to the same extent. The Saskatchewan Outfitters Association is active in marketing to anglers with a tagline “Real Fishing, Real People – That's Saskatchewan”.

Saskatchewan research indicates that anglers have positive angling experiences due to the quantity of the fish, the services rendered, the guiding, outfitters, and the quality of the fishing<sup>61</sup>. American anglers felt that the fishing was better in Saskatchewan than back in their home state.

NWT lodge owners felt that the Saskatchewan lodge product was generally offered at a much lower price point than that of the NWT. There are some exceptions with some fly in, luxury, full service lodges that cater to Americans such as Wollaston Lake Lodge.

Markets are similar to that of Manitoba with an extra pull from the US Rocky Mountain States.

*“The Americans have been brainwashed for years to fish in Saskatchewan that they can drive there from Denver.” Lodge Owner*

*“Lots of guys who can't afford to fish in the NWT drive to Saskatchewan to satisfy their fishing needs.” Lodge Owner*

*“NWT has bigger fish than Saskatchewan. You have to fish a long time to catch a 12-15 Lake Trout, that is not your average fish.” Lodge Owner*

### **Northern Ontario**

Northern Ontario is accessible by road and has had a well-defined lodge culture for many years. Americans and Canadians have traveled for years to an Ontario lodge for their annual fishing trip.

Ontario has tried to make the switch from “consumptive” based tourism to “activity” based tourism. They have focused on selling the experience rather than the resource. With the same trends facing the NWT, there has been a consolidation of the overnight sport fishing industry with many lodges closing their doors. The older and less viable businesses are closing their doors rather than being replaced<sup>62</sup>.

Ontario has a very large internal market with large cities like Toronto to draw upon. They also have a very organized marketing effort with the Nature and Tourism Ontario and the Ontario Tourism Marketing Partnership Corporation.

With the road-based accessibility of Northern Ontario they are competing largely with Manitoba for the drive in lodge product<sup>63</sup>.

The top three sport fish species in Ontario are walleye, perch and smallmouth bass, which is different than that of the NWT.

*“Fish are larger in the NWT and you are going to get a more dedicated angler going to the NWT than to drive to a lodge in Ontario.” Lodge Owner*

*“You can’t get these big 40 plus inch Pike consistently in Northern Ontario or Minnesota.” Lodge Owner*

### **British Columbia**

British Columbia and Ontario lead Canada with almost 73% of the fishing trips in Canada by non-resident anglers<sup>64</sup>. BC has a large marketing engine in Tourism BC, a large internal market, and a series of non-governmental organizations involved in the socio-economic lobbying for fisheries.

The BC Fishing Resorts and Outfitters Association have recently undergone a marketing exercise and is targeting the following market segments: steelhead, salmon, lake fishing and river trout fishing<sup>65</sup>. These segments are not in direct competition with the NWT.

A large component of the BC fishing lodge product is fishing for salmon and steelhead. This is a particular style of fishing, with a distinct guiding culture, and is not competing against the NWT product.

The other major side of the BC product is the saltwater fishery, which tends to cater to a higher end, multi-day fishing lodge client. There are a number of exclusive, luxury, fly or boat in overnight sport fishing lodges along the coast that are priced equal to or higher than product in the NWT. A number of NWT lodge

owners stated that this was a different clientele and they were not interested in a freshwater fishing experience.

*“Converting a west coast saltwater angler to a little freshwater lodge won’t work, they may try a big lodge to mix it up.” Lodge Owner*

*“The product in the saltwater is different, you are scheduled all the time with boats, guides, watching the tides, conditions, less light – different than NWT.” Angling Client*

*“Can’t compare saltwater fishing to freshwater fishing. The fish are bigger, they fight harder, and they have five star service. Can’t convert an angler to our lodge even though we have full service.” Lodge Owner*

There are a number of freshwater lake fishing lodges in BC that tend to focus on fly fishing and often stocked Rainbow Trout<sup>66</sup>. This is a different product than that of the NWT and caters to a different client.

### **Alaska**

Alaska is similar to BC with a large saltwater fishery and a prominent steelhead and salmon lodge culture. There is a great deal of infrastructure in Alaska with lodges accessible by road, boat, and fly in.

There are many full service, fly in lodges in remote Alaska that cater to Americans from out of state. They feature an exciting fully guided product, often characterized by rafts, rivers, rugged wilderness, wildlife and many salmon.

There does not seem to be a coordinated approach in Alaska for marketing the freshwater sports fishery or fishing lodges.

*“Relative to Alaska, NWT is good value with incredible fishing. Alaska would be more expensive and not better quality.” Lodge Owner*

### **Yukon**

Yukon is not in direct competition with the NWT. Their overnight sports fishing sector is very small with only a handful of fishing lodges. Many small and medium scale fishing lodges are primarily hunting lodges or outpost camps rounding out the shoulder seasons with very little marketing.

There are also only one to two fly in lodges that have Lake Trout and Northern Pike that would be considered trophy size. The Yukon fishing product does not have the same quality and quantity of fish as that of the NWT.



The Yukon Wild Marketing Program through the Wilderness Association of the Yukon has an active and effective marketing program, however, the fishing product listed is minimal and only day product by outfitters.

Yukon also has a different type of product with some fishing lodges catering exclusively to Europeans given the direct flights from Frankfurt to Whitehorse.

## Unique Attributes of the NWT Product

If the NWT is to stand out relative to its competition it needs to use unique attributes to develop a unique selling position (USP) in NWTT's destination marketing. These unique elements will assist in influencing a travel decision relative to the competition. The following list has been generated by the consultant utilizing various sources of secondary research, the supply side and client interviews and then checked against the competitive analysis. The attributes most commonly associated with the NWT overnight sport fishing sector are:

- Natural Features
  - Large, clean lakes
  - Pristine natural environment
  - Clean air and clean water
  - Fish under the Aurora
  - Fish under the midnight sun
  - Unique northern wildlife
  - Wild, pure, untouched
  
- The Fish and Fishery
  - Catch and release history
  - Quality of the fishery
  - Healthy, great tasting fish
  - Trophy size Lake Trout
  - Trophy size Northern Pike
  - Consistent trophy sized fish
  - Environmental stewardship
  - Fast and furious fishing
  - Ease of locating fish
  - Fish virgin waters and find new "holes"
  - Wild fish
  - More in a day than a lifetime
  
- Experiential Elements
  - Lack of sound, peace and quiet
  - Remoteness
  - Authentic northern culture

- Undiscovered
  - Fish around the clock
  - Personal challenge
  - Sense of accomplishment
  - Physical adventure
  - Experiencing nature without or with a guide
  - Slower pace north of 60
  - No experience necessary – simplicity
- *Lodge Elements*
    - Lodge culture
    - Float plane and remoteness
    - Make a connection
    - Belonging and camaraderie
    - Informality of northern hospitality
    - On your own schedule on your own lake
    - Reputable operators with decades of experience
    - Authentic northern characters

## Positioning of NWT's Unique Attributes

The unique attributes listed above are the key ingredients in defining the USP for the NWT. Working with the unique attributes, the USP for the NWT's overnight sport fishing sector can be defined as: NWT's Lodge Culture, Fishing Wild Places, Excitement in the Bite, and a Quality Fishery. The following are creatively written descriptions designed to showcase the different elements within each unique attribute.

### *NWT's Lodge Culture*

A connection to the non-assuming northern hospitality, invested, authentic characters with a frontier spirit. The experience is relaxed, fishing on your own schedule, features home cooking, and great campfire stories. It is an escape, with a sense of personal challenge and accomplishment.

The comfortable camaraderie, sense of belonging, and great people, defines a place where you came as a stranger and leave as family. The bush plane flying over rugged landscape sets the stage for a very special fishing experience seeped in culture and history. The fishing is your motivation but there is something intangible in the experience that will bring you back.

### *Fishing Wild Places*

The unique northern geography, Canadian Shield, wildlife, and big lakes define this last great "wild place". Experiencing wildlife and nature while fishing offers a surprise around every corner. Dramatic moving water, deep dark holes, with

aqua-blue shoals provide a sense of the diversity of species and the different tactics that can come into play.

The chance to be out under the midnight sun and experiencing the Aurora make this less about the fishing and more about the connection to this special place. The only boat on the lake, the sound of quiet, you enjoy the peace and have an appreciation of the environment around you.

### *Excitement in the Bite*

The fish are forgiving. They are just as likely to accept a calculated and refined cast as much as first time rookie's chuck into the weeds. Stealth and approach come into play when sight fishing for Lake Trout or Northern Pike. Sneak up on that fish, predict its path, cast appropriately, and hold your breath. Strip, strip, twitch, twitch. Synapses fire for the strike with a perfect hook set firmly in its jaw.

Tackle perfectly matched, single barbless with an enormous fish at the end of your line. Your guide expertly put you onto this scaly monster now you've got to take care of the last 20 feet. She comes in close enough to see that this is like nothing you've ever seen. The cradle comes out, you have enough time to ponder this defining moment, click of the camera, and she goes back in. You are definitely coming back again.

### *Quality Fishery*

It all starts with the flight over this unique geography, the shield, the endless trees, the islands, the scattering of ducks, and the splish, splash of a large moose you've caught from the corner of your eye. The lake is massive but your lodge fits like a puzzle piece nestled into the corner of a sheltered island.

With a drink in hand you stare out at the dock, the boats, and the moonlit water. You feel the butterflies in anticipation of day one of many. You can't wait to head straight to your "money spot" to hook into a steady run of Lakers. Through the clear, clean, water, you remember how this defined shoal was a fish highway. You know this trip is different as you slowly slide back to your room to join your sleeping grandson. This is going to blow his mind. You are thankful he's resting, because he'll need his energy tomorrow.

## **Market Segments**

Keeping in line with the previously identified unique attributes and the unique selling position there are four specific market segments or personas that the NWTT marketing could focus on. These are: Simple and Solitary, Northern Affinity, Bite Addicts, and Trophy Seekers.

## Simple and Solitary

This market is typically Canadian with a predominance coming from Alberta. Your classic “do it yourself” group that don’t mind a small, simple lodge.

They work hard in the trades or are related to the “oil patch”. They are slightly younger (40-55) than other market segments and almost exclusively male.

They have grown up fishing hardware but a few are considering trying fly fishing.

They attend sportsman’s consumer shows and watch fishing shows on TV. They are motivated by testimonials from friends or family that have been to a lodge before. Usually one person in the party does the research and planning which can involve searching on reputable fishing specific websites.

They want a high quality fishing experience without the frills and the high price tag. They know how to fish, have a group of fishing buddies that they go out with every year.

They have fished in Alberta, Saskatchewan, Manitoba or Ontario before and typically drive to a lodge. They fish hard but indulging, camaraderie and the social aspect with their own group is key.

They all want to catch the biggest fish in their group but are happy with steady action and loosely counting how many fish they’ve caught. They are not species specific willing to try fishing different species.

They want simple and affordable and don’t mind renting the lodge themselves and taking care their own needs. They can handle a boat and motor and just want to be pointed in the right direction. Some basic “meat and potatoes” home cooking is welcomed but they don’t need to be pampered.

They have always wanted to travel and take in a NWT lodge fishing experience but perceived it as too expensive or more for the full service American clients.

## Northern Affinity

These are still largely Canadian anglers but come from a wider geographic base. There are many Albertans but can draw from Ontario and British Columbia as well. American anglers from Minnesota and Chicago are also interested in this product. They are interested in a medium scale lodge experience with three meals a day, boats that can be taken out and the ability to purchase or indulge in other services (i.e full service bar, laundry, Internet, assisted guiding). The lodge has an owner and small staff contingent on site.

They are slightly older than the *Simple and Solitary* market and have higher levels of income. They would be considered the “upper middle class” that are well

traveled and have fished in different locations. They know how to fish as well and are refined in that they are often fly fishing.

They come every second year and occasionally mix it up with a sunny, exotic fishing destination. They often fish with the same people but the groups are smaller than the *Simple and Solitary* market. They don't mind coming on their own as well and mixing into the lodge given they have a level of comfort with the lodge, ownership and staff.

They are willing to pay for a lodge experience and are looking for good value rather than a good deal.

They appreciate the uniqueness of the north, the beauty, the wildlife and those intangible and unique attributes of the NWT. They enjoy the authentic, invested northern characters that own and guide at the lodge because they are so different than who they associate with in their normal social circles.

They are discriminating anglers that have specific tactics they employ and want to fish at a specific time each year. They are often fly fishers and have personal fishing goals that they want to achieve. This often means a preference for a particular species at a specific time of year. They want steady action and a quality fishery, however, each year they come it becomes less about the fishing and more about the getaway.

The lodge is a haven for the *Northern Affinity* segment. They often feel like family at the lodge and feel a kinship, loyalty and affinity with the lodge ownership. They are also likely to fish with the family and facilitate multi-generational trips.

### **Bite Addicts**

This market segment is primarily made up of the remaining "hard core" anglers that are in search of trophy fish, unique species; utilize special tactics and steady action. They are also predominantly male but can have some women fly fishing participation.

*Bite Addicts* are within all geographic markets but feature a higher percentage of American anglers from the mid-west than the *Northern Affinity* and *Simple and Solitary*. Still primarily Canadian, this market segment will travel farther to get to the best fishing spots.

The consistent, trophy size 40 inch plus Northern Pike are a key species for this market. Some of them will target larger Lake Trout through non-traditional means (i.e. Lakes on the fly or on the surface). They also like the variety of species because it is a challenge and keeps them working hard refining their skill.

They tend to look for medium scale lodges that offer some services, as they would rather focus on the fishing than worry about taking care of everything else.

They are capable and want to have insight into the best fishing spots and the specific tactics for the species at the lodge; but can then be left on their own.

There are also higher end, upper income anglers in this segment that will also look to the full service, large scale lodges. They are keen to learn from a guide that knows specific tactics for that lodge.

These anglers will key in on the excitement and challenge of fishing and set personal fishing goals. They will most likely target in on a tactic and species and obsessively test, refine and exploit it until they catch fish consistently.

This market regularly purchases fishing magazines, reviews species and angling specific blogs and forums, and attends Sportsman Consumer shows and fly fishing expositions.

### **Trophy Seekers**

Trophy seekers are anglers looking for a full service, fully guided and often pampered product. They want to hook into a trophy for bragging rights and then want to settle into a high quality large scale lodge. They are a higher income, highly educated group that are used to this level of service. They have been to the lodge before and come virtually every year. They have faith in the ownership, guides, quality of service and have no issues with paying for it.

They tend to be largely American with “American plan” expectations. There are some Canadians that are looking to these lodges occasionally as they offer the potential to land a “lunker”.

Clients in this lodge expect to catch a trophy fish during the week and will put in the time with a guide to get one. Steady action comes after that, but the day always ends with a culinary creation, scotch in hand, and a trip to the sauna or hot tub before bed.

These are the oldest anglers of the market segments. They have come to the same lodge over the years and are starting to see their group dynamic change with some not as active anymore or others bringing their sons or daughters. If not trying to convert them to a trip to Europe, spouses often accompany this market segment to enjoy the lodge amenities and occasionally the fishing.

They used to rely exclusively on the same, tried and true tactics, but are now trying to mix it up with other fishing techniques that are introduced by their guide.

### ***Further Marketing Principles***

Within these unique attributes, USPs and key market segments there is a need to incorporate the following three principles across all marketing efforts:

- (1) bring the excitement back into the NWT lodge fishing experience;**
- (2) dial up the emotional appeal; and**
- (3) focus on the authentic nature of the product.**

## **Destination Mix Components**

NWT lodge owners were interviewed and asked how they have diversified their products or services in reaction to the declining angling market. The majority were making adjustments but none of the lodges were looking at targeting other market opportunities (i.e. ecotourists, hikers, birdwatchers).

As was mentioned earlier, there were honest efforts at diversification but the lodges could not make it work for a variety of reasons. Some were specific and stated the limitations with the short lodge season (ice out and freeze up), NWT geography and location.

*“It is difficult to hike or do much more than fish on these small islands. The season is also too short for these activities.” Lodge Owner*

*“It is more about giving them something to do when not fishing, not necessarily about finding another market to attract.” Lodge Owner*

There were a few that were still operating at capacity or were as busy as they wanted to be. The small scale lodges that are no longer investing in marketing or investing in their lodge infrastructure were not as concerned about diversifying their product. They offer a lower overhead, simple, “do it yourself” product where it is up to the angler to keep themselves entertained through fishing.

Some medium scale lodges were making refinements to their lodge products, services and infrastructure. Specifically, lodge owners stated they were offering wood fired hot tubs and saunas as options, and one was starting to augment the fishing product by catering to women’s packages through a spa or a massage therapy add-on.

It is suggested that product development efforts should continue for medium to large scale lodges in an effort to add value to the current fishing product as well as to cater to spouses or non-fishing party members. Some other secondary product diversification ideas included providing anglers with the use of canoes, kayaks, cutting marked trails for hiking and wildlife viewing.

One medium sized lodge was focusing on the quality of the experience within the lodge. They would actively engage the anglers in cooking or baking if they wished in order to make it more of a family type atmosphere. They were also getting more creative and experiential with their cuisine whereby they use local, fresh ingredients, berry pick, smoke fish and implement other culinary ideas. The suggested focus on the “culture” of lodges and the family type atmosphere also opens the door for the product to be further enriched through art, photography and other creative initiatives.

This will always be a secondary focus after the fishing, but if anglers are enjoying the finer aspects of a lodge experience at particular lodges then efforts to enhance the experience might be well served. Examples could include activities such as: jam-making, lessons on smoking fish, cooking classes, fish carving, storytelling, and live music may enrich the experience.

*“Fisherman want to fish. Nice to walk down a trail but they want to fish.” Lodge Owner*

*“We have always had hard core anglers, never anyone else, we have canoes but people hardly use them, the after dinner paddle is rare.” Lodge Owner*

The provision of Internet was seen as a standard amenity within most medium scale lodges, however, a few preferred not to offer it in order to focus on relaxing, communicating with others, and disconnecting from the outside world.

Large scale lodges were constantly looking at refinements in their product in order to remain competitive in a full service environment. This meant constant improvements to their infrastructure, rooms, and plumbing as well as to their service. The majority of lodges were offering spouse programs where they have separate non-angling packages or offer peace and quiet for relaxation and reading.

A few lodges mentioned how they were investing time and resources into ensuring that guides were fully trained and providing an enriching experience while on the water. One lodge owner is training fishing guides on the geology, natural environment, birds, history (prospecting and Gold Rush) and First Nations culture.

*“We have a real opportunity to bring into the share the history and culture with Gold Rush artifacts, Gold Rush era-sites and the cache with ice-road truckers and ice pilots.” Lodge Owner*

Moving traditional hardware fishers to fly fishing as is being done with some lodges is a worthwhile product development initiative for a few reasons. Firstly, it provides the hardware angler with a new product offering and a new way of



experiencing the lake. Secondly, it moves the product away from the traditional and puts more excitement into the NWT fishing product. Finally, as was mentioned the fly fishing market is a niche market well suited for the NWT.

It should be mentioned that there are a few lodges, mainly close to Yellowknife or other communities that offer ice-fishing or winter product. Clients can snowmobile or make their way with other tracked machines to enjoy ice fishing, the Aurora and other typical winter activities. One lodge owner was considering actively promoting this for the upcoming year to the visiting friends and family market.

Most lodge owners were aware of the Product Diversification Fund from Industry, Trade and Investment but some stated that it was clearly defined that it does not apply to consumptive tourism.

## Government Support

Government support in each jurisdiction varies. The research consulted with five competing jurisdictions either via email, phone or through a website review. The two types of organizations, Government and Industry Associations, provided the following type of support: business development, product development, consumer shows, advocacy, and marketing. The table in appendix C lists the specific support for each competing jurisdiction and respective organization.

With the two types of organizations, Government and Industry Associations, functions varied with industry associations being established primarily for advocacy. Government was largely responsible for marketing, business development and product development.

Many industry associations stated that they also provided marketing functions as a result of being a member driven organization and wanting to provide additional value to members. Some of the industry associations stated they do their own marketing because membership did not feel that the Government Tourism Departments understood or were able to market fishing properly. Some industry associations marketing ranged from simply presenting outfitter or lodge listings (i.e. Saskatchewan Outfitters Association) to a fully developed strategic marketing program (i.e. Wilderness Tourism Association of the Yukon through their *Yukon Wild* program). Government agencies primarily provided print material largely as a result of the associated cost with the printing and distribution.

Most jurisdictions offered little by way of marketing or product development financial support. The exception being Ontario and Yukon with financial marketing support for consumer shows and marketing materials.

Some governments like Saskatchewan and British Columbia focus on the quality of the resource through stocking programs and generating revenue through the sale of fishing licenses. Other functions of government included providing one-day fishing licenses or assisting in more user-friendly online sales.

All governments produce official fishing regulations that they publish in print and online. Some jurisdictions create stand-alone “official” regulation publications that are designed for an internal audience and do little by way of promoting tourism.

Other jurisdictions like Manitoba and the “official” *Manitoba Anglers Guide* is a good example of where they present the regulations with a considerable amount of cross-promotion and trip planning information that benefits outfitters and lodges.

## Strategic Recommendations

The following are a list of recommendations and suggestion related to: general marketing, tactic suggestions, creative, scale of lodges, and geo-markets.

### *General Marketing:*

- Focus on the following principles in all creative:
  - bring the excitement back into the NWT lodge fishing experience;
  - dial up the emotional appeal; and
  - focus on the authentic nature of the product.
- Move away from the traditional trophy Lake Trout pitch. Bring in other experiential elements beyond the size of the fish. It is difficult to meet this expectation to catch trophy Lake Trout when the most common size is three to 10 pounds. Likewise, ensure that marketing does not only focus on the guided big lake fishery. There are an increasing amount of smaller self-guided options.
- The NWT as a destination may not have the resources to chase the smaller, niche markets. These niche markets (women, fly fishers, children and families) should be represented in wide variety of imagery and copy in order to show variety but not as a sole focus. It may make sense for individual lodges as a business decision to target niche segments in their positioning.
- Lodges need to identify their own positioning that complements the destination’s positioning. The traditional lodge pitch no longer applies, lodges need to hone in on what makes them unique and then back it up with product.
- All marketing and fulfillment materials, even early on, need to ensure they have a sufficient level of detail to meet angler’s trip planning expectations.
- Ensure there is a clear hand off between the destination’s marketing materials and individual lodge or outfitter. Think critically about the path to

- purchase for anglers and ensure there are no gaps that will lose prospective customers.
- Highlight innovative and exciting fishing tactics and lures used in today's fishing industry.
  - Work with lodges to develop brand ambassadors through capturing testimonials and referrals from existing existing anglers. This can include at a basic level, sharing ways to capture testimonials, sharing trip reports through social media, posting to credible NWT blogs and forums, or re-invigorating the *Angler Wall of Fame*.
  - Continue to market the angling day product in the regions through traditional leisure marketing efforts. Try to convert this rubber-tire leisure traveler to a lower cost, short duration, small scale lodge experience while marketing the region.

### *Tactic Suggestions:*

- Work with lodges and develop tactics to encourage multi-generational trips. Encourage the already converted older demographic to bring along family members or a spouse.
- Encourage lodges to stay top of mind with repeat anglers. The nature of repeat business is changing and they are now coming bi-annually with many other options. Look at tactics, like e-news, loyalty programs, and reminder phone calls.
- Continue to focus on angling niche publications such as:
  - *Canadian Fly Fisher*;
  - *Fly Fishing and Fly Tying Journal*;
  - *Fly Fusion*;
  - *Outdoor Canada*;
  - *Sporting Classics*;
  - *Fly Rod and Reel*;
  - *American Angler*; and
  - *Canada's Outdoor Sportsman*.
- Focus on the gaps in the *NWT Fishing Guide* and build a more robust guide that will aid in trip planning. Content should include: regulations, access, detailed maps, locations, lures, weather, and prices.
- Consider a fishing and hunting resource person (on-call) that can follow up on inquiries via email and phone and can speak to the product.
- Operator listings across web or print need to be segmented and searchable by lodge scale, and other factors such as amenities, price, species, and tactics.
- Develop a canned powerpoint presentation and meet with Fishing Clubs in Calgary, Toronto, Edmonton and Minneapolis.
- Consider the development of a cooperative marketing program with export ready lodges buying in and getting dedicated marketing support (i.e. like the *Yukon Wild* marketing program).

- Develop a fishing specific micro-site like HuntFishManitoba.ca with detailed outfitter and lodge listings and links to relevant trip planning information.
- Continue to build and support social media tactics for the fishing sector (i.e. Twitter @NWTfishing) but incorporate positioning featured within this report.
- Consider supporting a dedicated NWT angler fishing forum or blog. The NWT Anglers Hall of Fame might be a component of this.

### *Creative:*

- All marketing and fulfillment materials, including copy and photography needs to be vetted by an angler or the fishing industry to ensure it is credible and authentic to anglers. Lodges should be present at consumer shows.
- Provide relevant user-driven angler testimonials and fishing celebrity endorsements in marketing materials.
- Ensure the creative gets beyond trophy Lake Trout and reflects the diversity of species, differences in geography, gender and differences in tactics.
- Understand the subtleties of the different species and tactics and how they resonate with different markets.
- Recognize that Grayling, Walleye and Lake Whitefish are secondary elements in the lodge based fishing product but should not be the major draw.
- Considering advertising in non-traditional media such as Oil and Gas Trade Publications for the Albertan “Oil Patch” business.
- Some photo protocols to consider:
  - Linking the photo to details around: location, tactic, species caught, and lure used;
  - Have an element of a unique tactic used (i.e. sight fishing for lake trout, Northern Pike on the surface, fishing shoals) in each “hero” shot;
  - While still predominantly male, demonstrate a diversity in gender and representation: females, males, children, multi-generational, couples, and ethnic groups;
  - Proper catch and release methods and live release photography (i.e. cradles, no blood);
  - More infrastructure shots and lodge photos highlighting unique characters, personalities, cuisine and experiential elements
  - While still a focus on Lake Trout and Northern Pike, show diversity in fish size in photography and secondary images of other species.
- Shoot new photography with specific creative direction. Do not stage it, send the photographer out with an existing fishing group.
- Consider the use of video as a means for highlighting the experiential elements of the NWT overnight sport fishing sector.

### *Scale of Lodges:*

- Differences in small, medium and large scale lodges - all marketing should reflect the diversity of the NWT lodge product in terms of scale of lodge.
- Focus on marketing of medium and large scale lodges – small scale lodges will benefit from increased destination awareness, however, it is the medium and large that are export ready, looking to increase occupancy and require dedicated marketing support.
- Find a balance between marketing the high end full service large scale lodge and the medium scale lodge that can offer high value at a lower price point.

### *Geo-Markets:*

- Continue to focus a portion of the marketing budget on the US market. The US mid-west is still a target given its proximity and if clearly differentiated and presented with the variety of lodge products (i.e. medium scale lodges), they may be convinced to try an NWT lodge rather than Manitoba or Saskatchewan. The US market is also interested in the full service large scale, lodges which are a critical part of the NWT product.
- Market in places like Denver where they are not as engrained as the Minnesota markets to go to Manitoba, Saskatchewan or Ontario.
- Ramp up efforts in Alberta. The demographics support a focus on the medium scale lodge product, however there may also be cross-over into small and large scale markets as well.
- Consider non-traditional marketing opportunities in partnership with industry already working in the Alberta trade and “oil patch” sector.
- Assist in building the small corporate market for medium and large scale lodges. There is an opportunity in Alberta with industry already working in the Alberta trade and “oil patch” sector.
- Be conservative as a destination supporting the foreign markets. In terms of allocation of limited resources, targeted campaigns in specific countries (like France, Germany or Britian) may not be a good investment at this time. Perhaps support foreign fishing media or FAMs occasionally or leave this as an individual lodge decision to target this market.

# Appendix A:

## Competitor Analysis – Print and Website

### Northern Manitoba:

Print:

<b>Publication and Tagline:</b>	<b>Positioning:</b>	<b>Comments:</b>
<p><i>Manitoba Fishing and Hunting Guide</i></p> <p>Taglines:            “Bigger Catch, Better Lodges”            “Fly Fishing in Manitoba”            “Sustaining Our Fisheries”            “Manitoba Big Game Trophies”</p>	<p>Diverse in species and demographics (many kids, young adults and women)            Species: all in Manitoba</p>	<ul style="list-style-type: none"> <li>• Robust guide with content around: Master Angler Records, Lil’ Angler Awards Program, Regional Overviews, Outfitter Listings, detailed maps</li> <li>• Excellent photography with the anglers name, where they are from, size of catch and species</li> <li>• Lodge listings with descriptions and amenity icons</li> <li>• Broken out by outfitters and lodges</li> </ul>

Web:

<b>Organization and Website:</b>	<b>Lodge Listings:</b>	<b>Comments:</b>
<p>Manitoba Lodges and Outfitters Association (<a href="http://mloa.com/">http://mloa.com/</a>)</p>	<p>Organized by: lodge amenities, services, category (hunting, fishing, wildlife viewing, adventure and then sub-species)</p>	<ul style="list-style-type: none"> <li>• Industry site with listings</li> <li>• No focus on species</li> </ul>
<p>Hunt Fish Manitoba (<a href="http://huntfishmanitoba.ca">http://huntfishmanitoba.ca</a>)</p>	<p>Organized by: Fishing/Hunting then species (Lake Trout, Northern Pike, Walleye and more)            Operator/lodge internal landing page with photos, description, map, similar lodges, form for inquiry</p>	<ul style="list-style-type: none"> <li>• Consumer site</li> <li>• One click to lodge listings, icons, map navigation, database categories, activities, features, seasons, access, etc..</li> </ul>

### Northern Saskatchewan:

Print:

<b>Publication and Tagline:</b>	<b>Positioning:</b>	<b>Comments:</b>
<p><i>Saskatchewan Fishing and Hunting Guide</i></p> <p>Tagline: none</p>	<p>Big fish            Stories that bring out the unique character and rich experience (i.e. family</p>	<ul style="list-style-type: none"> <li>• Primary species: Northern Pike, Lake Trout, and Walleye</li> <li>• Focus on the internal market and external anglers</li> </ul>

	stories, recipes)	<ul style="list-style-type: none"> <li>Fishing outfitters matrix by species, amenities and tactics</li> </ul>
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Web:

Organization and Website:	Lodge Listings:	Comments:
Saskatchewan Outfitters Association ( <a href="http://soa.ca/">http://soa.ca/</a> )	Lodge listings by simple direct link no categories	<ul style="list-style-type: none"> <li>Industry site</li> <li>No focus on species</li> </ul>
Tourism Saskatchewan ( <a href="http://www.fishing-in-saskatchewan.com/">http://www.fishing-in-saskatchewan.com/</a> )	Package listings by price (alphabetical). Package landing page, details in USD, multiple photos Fishing outfitters database by: community/park/lake and random categories	<ul style="list-style-type: none"> <li>Fishing micro-site</li> <li>“Hero-shot” with segmentation – both large fish and experiential</li> <li>Fishing Forum</li> <li>Other dynamic content</li> <li>Extensive trip planning info Q and A, maps, rules and regs, border info, apps, fishing events</li> <li>1-877#</li> </ul>

Northern Ontario:

Print:

Publication and Tagline:	Positioning:	Comments:
<i>Ontario Fishing and Hunting Vacations</i>  Tagline: no clear tagline, some regional taglines	Celebrity anglers - TV Women fly fishing, endorsements	<ul style="list-style-type: none"> <li>Primary species: Walleye, Bass, Muskie</li> <li>Operator/lodge listings by lodge amenities, species and tactics</li> </ul>

Web:

Organization and Website:	Lodge Listings:	Comments:
Nature and Tourism Ontario ( <a href="http://noto.ca/">http://noto.ca/</a> )	Listed separately under “Planning your Vacation” – map based focus on tourism operators in each region	<ul style="list-style-type: none"> <li>Industry site, consumer site secondary</li> <li>No focus on species</li> </ul>
Go Fish Ontario ( <a href="http://www.gofishinontario.com/">http://www.gofishinontario.com/</a> )	Under: species of fish (19 types), type of trips, access methods	<ul style="list-style-type: none"> <li>Primary species: Northern Pike and Muskie</li> <li>Prices in Canadian and USD</li> </ul>
Canada’s Great Outdoors – Northern Ontario ( <a href="http://northernontario.com/">http://northernontario.com/</a> )	No lodge listings, regional focus	<ul style="list-style-type: none"> <li>Year round fishing information, tactics, regions, species, experiences</li> <li>Blog style, social media integration</li> <li>More for the internal market</li> </ul>

travel/fishing)		
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British Columbia:

Print:

<b>Publication and Tagline:</b>	<b>Positioning:</b>	<b>Comments:</b>
<i>Super Natural, BC Outdoor Adventure Guide 2014</i>  Tagline: Supernatural BC	BC's brand based on nature. General fishing listings with "water" section Fishing opportunities by region	<ul style="list-style-type: none"> <li>• Primary species: salmon, sturgeon, some random fly fishing</li> <li>• Broken out by freshwater and saltwater</li> <li>• No operator listings</li> </ul>

Web:

<b>Organization and Website:</b>	<b>Lodge Listings:</b>	<b>Comments:</b>
BCFROA ( <a href="http://wheretofishinbc.com/">http://wheretofishinbc.com/</a> )	Members by regions, multiple search categories and map based Operator landing page allows for description, contact information, icons for fishing, fish species, activities, accommodations, facilities and equipment.	<ul style="list-style-type: none"> <li>• Consumer site: rich photos, hero shots, segmentation (family fishing vacations, river fly fishing, steelhead, salmon, fly in lodges)</li> <li>• Traditional site: fishing adventures, regions, species, resorts</li> </ul>
Go Fish BC ( <a href="http://www.gofishbc.com/">http://www.gofishbc.com/</a> )	All about Freshwater Fishing in BC, responsibly	<ul style="list-style-type: none"> <li>• More for the internal market</li> <li>• How to fish, where to fish, fishing stocking, fish facts</li> <li>• Local fishing opportunities</li> </ul>
Hello BC Government Site ( <a href="http://www.hellobc.com/">http://www.hellobc.com/</a> )	Operator/lodge listings by map and simple listings category: ice fishing, saltwater, freshwater, alphabetical	<ul style="list-style-type: none"> <li>• Similar to NWT with fishing under "water activities"</li> <li>• Multiple clicks to fishing category</li> <li>• Species multiple with sturgeon, salmon and steelhead</li> </ul>

Yukon:

Print:

<b>Publication and Tagline:</b>	<b>Positioning:</b>	<b>Comments:</b>
<i>Yukon</i>  Tagline: none	No clear fishing brand Icons only (i.e. Aurora, Midnight Sun)	<ul style="list-style-type: none"> <li>• No dedicated fishing guide</li> <li>• Random staged fishing photos, mainly in regions</li> <li>• A few listings under activities.</li> </ul>

Web:



<b>Organization and Website:</b>	<b>Lodge Listings:</b>	<b>Comments:</b>
<p>Wilderness Tourism Association of the Yukon (<a href="http://yukonwild.com">http://yukonwild.com</a>)</p> <p>Tourism Yukon (<a href="http://travelyukon.com/">http://travelyukon.com/</a>)</p>	<p>Members listed under: What do you want to do: fishing (only 5 listings, no lodges)</p> <p>Under things to do: 3-4 clicks to get to general listings. Categories not clear or related.</p>	<ul style="list-style-type: none"> <li>• Multi-activity portal – consumer site</li> <li>• No species, operator tagline “our experts know the best spots”</li> <li>• Organized by icons – non fishing related.</li> </ul>

## Appendix B:

### Competitor Analysis – Competing Exotic and Domestic Destinations

<b>Location:</b>	<b>Details:</b>	<b>Price and Package:</b>
Amazon (South America)	Possibility of vast number of species, including wildly exotic. Numerous world records.	\$3,500-\$6,000 – 7 days
Argentina	Trophy trout on private, world renowned waters.	\$4,500-\$7,000 – 7 days
Africa – Botswana or South Africa	Tiger fish at several options for lodges.	\$300-\$500/day
Russia	Atlantic Salmon on world famous rivers	\$8,000-\$12,000/week depending on season
New Zealand	World class and famous trout fishing – option of heli-fishing	\$2,900-\$4,500 – 7 days
Iceland	Atlantic Salmon world famous rivers	\$6,000-\$12,000 – 7 days
Labrador	Atlantic Salmon and Brook Trout	\$5,000-\$6,300
Alaska	River fishing for 5 species (Salmon and more). Fly outs included.	\$5,500-\$8,000
Yukon	Multi-species (Salmon, Lake Trout, Grayling, Pike and more)	\$4,000-\$6,000 – 7 day week
NWT	Mainly Northern Pike, Lake Trout, Walleye, Grayling	\$3,900-\$5,500 – 7 days

## Appendix C:

### Government and Industry Association Marketing Support to the Lodge Fishing Industry

Prov/ Terr.	Org. Type	Organization Name	Type of Support					Print Mat. Y/N
			Bus. Dev.	Product Dev.	Consumer Shows	Advocac y	Marketing	
ON	Industry	Nature and Outdoor Tourism Ontario				X	X	N
	Gov't	Ontario Tourism Marketing Partnership Corporation	X	X	X		X	Y
	Gov't	Go Fish Ontario					X	N
	Gov't	Canada's Great Outdoors - Northern Ontario (Yours to Discover)					X	N
MB	Industry	Manitoba Lodges and Outfitters Association		X	X	X	X	N
	Gov't	Travel Manitoba	X	X	X		X	Y
SK	Industry	Saskatchewan Outfitters Association				X	X	N
	Gov't	Tourism Saskatchewan					X	Y
BC	Industry	BC Fishing Resorts and Outfitters Association	X			X	X	N
	Gov't	Freshwater Fisheries Society of BC		X			X	N
	Gov't	Tourism BC					X	Y
YT	Industry	Yukon Outfitters Association				X	X	N
	Industry	Wilderness Tourism Association of the Yukon				X	X	N
	Gov't	Tourism Yukon - Industry	X	X	X		X	Y

## Appendix D:

### List of Interviews

<b>Name of Lodge</b>	<b>Contact</b>	<b>Category</b>
Hearne Lake Lodge	Edie Dul	Lodge
Indian Mountain Lodge	Don Briggs	Lodge
Kasba Lake Lodge	Rob Hill	Lodge
Lac Le Matre Lodge	Greg Dussome	Lodge
Mackay Lake Lodge	Gary Jaeb	Lodge
Namushka Lodge	Bryan Chorostkowski	Lodge
North Star Resort	Brian MacDonald	Lodge
Peterson's Point Lake Lodge	Margaret Peterson	Lodge
Rocky Bay Fishing Lodge	Terry Rae Webb	Lodge
Sandy Point Lodge	Duncan Cooke	Lodge
Scott Lake Lodge	Tom Klein	Lodge
Warburton Bay Lodge	Gary Jaeb	Lodge
Watta Lake Lodge	Robin Wotherspoon	Lodge
Wignes Lake Lodge	Robert Johnson	Lodge
Yellow Dog Lodge	Gordon Gin	Lodge
Great Slave Lake Tours	Shawn Buckley	Outfitter
Yellowknife Outdoor Adventures	Carlos Gonzalez	Outfitter
Bluefish Services	Greg Robertson	Outfitter
Northwest Territories Tourism	Ron Ostrom	Marketing
Think! Social Media	Ben Vadasz	Marketing
Hearne Lake Lodge	Ross - Alberta	Client
Hearne Lake Lodge	Jim - Minnesota	Client
Hearne Lake Lodge	Lawrence - Alberta	Client
Fly Fishing Team Canada – Hay River	Mac Starc	Guide
Northern Hookers	Jeffery Goudreau	Guide
Nature and Outdoor Tourism Ontario	Andre Dukhia	Industry
Ontario Tourism Marketing Partnership Corporation	Lisa LaVecchia	Government
Manitoba Lodges and Outfitters Association	Paul Terenne	Industry
Travel Manitoba	Lyall Wilson	Government
Saskatchewan Outfitters Association	Craig Blackmuir	Industry
BC Fishing Resorts and Outfitters Association	Matt Jennings	Industry
Yukon Outfitters Association	Teena Dickson	Industry

## Appendix E:

### Endnotes and Other Relevant Sources

<b>Endnote</b>	<b>Source:</b>
1, 2, 3, 21, 47	<i>2013-14 Marketing Plan</i> , Northwest Territories Tourism, Final Version, Undated.
4	<i>A Performance and Operations Assessment of the Northwest Territories Outfitted Sport Fishing Industry</i> , John St. Louis Consulting, August 2006.
5, 11, 40, 48, 59	<i>Our American Anglers, A Profile of US Anglers Fishing in Manitoba</i> , Travel Manitoba, Undated.
6, 18, 19, 22, 42, 62	<i>Government of the Northwest Territories, Outdoor Adventure Supply Side Analysis, Final Report</i> , KiSquared, January 7, 2007.
7, 26, 49	<i>Government of the Northwest Territories 2008 Fishers Final Report</i> , KiSquared, April 30, 2009.
8	<i>List of Licensed Fishing Lodges – Contact List – as of October 30, 2013</i> , provided by Industry, Trade and Investment, GNWT.
9	<i>Northwest Territories 2004-2005 Fishing Outfitter Survey Results</i> , Department of Industry, Tourism and Investment, November 2005.
10, 30, 31, 53, 54	<i>Northwest Territories Tourism Angler Market Study Focus Group Final Report</i> , KiSquared, April 12, 2007.
12, 16, 23, 60, 64	<i>2010 Survey of Recreational Fishing in Canada, Fisheries and Oceans Canada, Economic Analysis and Statistics</i> , published 2012.
13	Spectacular NWT website, viewed February 2013, <a href="http://spectacularnwt.com/whattodo/fishing/records">http://spectacularnwt.com/whattodo/fishing/records</a>
14	Enodah - Trout Rock Lodge Website, viewed February 2013, <a href="http://www.enodah.com/Fishing">http://www.enodah.com/Fishing</a>
15, 24, 25, 35, 39, 44, 51	<i>Statistical Trends in Recreational Angling, NWT, Canada, USA, Sportfishing Product Development Conference</i> , February 13, 2008.
17, 33	<i>2013 First Time and Repeat Angler Analysis National Summary Report – Prepared for the Recreational Boating and Fishing Foundation</i> , Southwick Associates, August 2013
20, 50	<i>2002 Visitor Exit Survey, Report on the Fishing Segment of Visitors to the Northwest Territories</i> , Industry, Tourism and Investment, GNWT, undated.
27	<i>Northwest Territories 2006 Visitor Exit Survey Anglers</i> , Industry Trade and Investment, GNWT, January, 2008.
29	<i>Northwest Territories Tourism, Marketing Plan Consultation – Fishing</i> , May 4 <sup>th</sup> , 2009.
28, 31, 32, 41, 45	2010-2011 NWT Visitor Exit Survey Report, Industry Trade and Investment, GNWT, June, 2013.
33, 34, 36, 37	<i>Niche Segment Review</i> , Recreational Boating and Fishing Foundation, March 10, 2011.
33, 38, 52	<i>2011 Special Report on Boating and Fishing</i> , Recreational Boating and Fishing Foundation.
43, 57	<i>Sport Fishing and Game Hunting in Canada, An Assessment on the Potential International Tourism Opportunity</i> , CTC Research and Evaluation, October, 2012.
46	Letter from Northwest Territories Tourism to Lodge Owner, <i>Re: Promotion of Fishing and Hunting in the NWT</i> , May 24, 2013

55, 56	<i>Appendices - A Performance and Operations Assessment of the Northwest Territories Outfitted Sport Fishing Industry</i> , John St. Louis Consulting, August 2006.
58, 63	Personal Communication, Lyall Wilson, Travel Manitoba, in person interview, November, 21, 2013
61	<i>Economic Evaluation of Saskatchewan's Outfitted Hunting and Fishing Industry</i> , Derek Murray Consulting Associates, December, 2006
65	<i>Experiences BC Tourism Plan</i> , Tourism BC, November 2011.
66	<i>2013 BC Freshwater Sport Fishing Economic Impact Report</i> , Freshwater Fisheries Society of BC.
	<b>Other Sources Reviewed in the Research:</b>
	<i>The Economics of Fishing in Canada</i> , Canadian Sportfishing Industry Association
	<i>Gone Fishing: A Profile of Recreational Fishing in Canada</i> , Statistics Canada, 2005, <a href="http://www.statcan.gc.ca/pub/16-002-x/2008002/article/10622-eng.htm">http://www.statcan.gc.ca/pub/16-002-x/2008002/article/10622-eng.htm</a>
	<i>2010/11 Marketing Planning Sessions – Fishing Sector</i> , Northwest Territories Tourism.
	<i>Northwest Territories Fulfillment Report November 2013</i> , Web and Print Fulfillment Analytics.
	<i>Canadian Tire – Sportfishing Promotion</i> , Northwest Territories Tourism, October 22, 2013.
	<i>Travel Manitoba Economic Evaluation of Manitoba's Hunting and Fishing Industry – Final Report</i> , KiSquared February 1, 2012.
	<i>2013-14 OTMPC Business and Marketing Highlights</i> , Ontario Tourism Marketing Partnership, January, 2013.
	<i>1998 Visitor Exit Survey</i> , Summary of Results, Resources, Wildlife and Economic Development, GNWT, undated.
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	<i>Northwest Territories Tourism, Strategic Plan Update</i> , Tait Communications and Consulting, April 2013.

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