



**NWT Tourism**  
**Fishing Sector Workshop Report**

Submitted on Tuesday April 8th, 2014

By AYNi Conceptions

Sylvie Francoeur  
5405-45 Street  
Yellowknife, NT X1A 1K7  
[sylvie@ayni.ca](mailto:sylvie@ayni.ca)  
867-766-4804

## Context

---

On March 12<sup>th</sup>, 2014 NWT Tourism (NWTT) invited its members and others involved in the fishing industry to participate in a consultation workshop to be held in Yellowknife on March 29<sup>th</sup>, 2014. The services of Ayni Conceptions were retained to facilitate this workshop.

The following is a report of the results of this day-long discussion.

## Introduction

---

In 2013, NWTT started to revitalize the fishing industry in the NWT, more precisely the over-night fishing industry. Its first step was to gather data on the industry and the second was to consult the industry directly.

NWTT worked with researchers at the Department of Industry, Tourism & Investment (ITI) with the Government of the Northwest Territories (GNWT) to establish a profile of anglers in the NWT. ITI worked with data from Environics Analytics to produce a study of Non-Resident Angling. NWTT also hired Dennis Zimmerman to conduct qualitative research on the NWT fishing industry. Mr. Zimmerman contacted lodge owners in the NWT and studied other destinations that market over-night fishing to produce analysis on NWTT's marketing efforts.

Once these studies were completed, NWTT invited members and non-members to attend a workshop where they could learn about the results, and discuss how they could be used to revitalize the fishing industry.

The goals of this workshop were the following:

- 1) Update fishing tourism operators on the results of research recently conducted on the fishing industry in the NWT.
- 2) Confirm research findings with operators to make sure they did not contradict their reality.
- 3) Inform participants on NWT Tourism's recent marketing initiatives in regards to the fishing sector.
- 4) Develop the basis of a marketing strategy for the fishing industry that will aim to increase visitation to lodges offering fishing.

There were 22 participants in the workshop: all but one of the 11 fishing operators were lodge owners. The others were government representatives, consultants, including Kellett Communications, NWTT's Agency of Record, and employees of NWTT.

## Expectations

---

Participants' expectations were in line with the goals of the organizers. In addition, participants expressed the following four expectations:

- 1) Participants were hoping that this workshop would be the first step in revitalizing the fishing industry in the NWT.
- 2) Participants were also hoping that this would be the beginning of an on-going consultation process with operators involved in the fishing industry.
- 3) Participants were hoping to network with each other.
- 4) Many of the participants were aiming to learn more about the fishing industry and some specifically wanted to learn about the different market segments.

Some of the participants were also curious to learn more about NWTT'S financial investment in marketing the fishing industry. It was understood by all that although this discussion was important, it was outside the scope of this workshop. NWTT offered to stay at the end of the day with participants who wanted to discuss it further.

Furthermore, participants were informed that any idea or concern expressed during the day that fell outside the scope of the day's meeting would be noted and NWTT would follow-up at another time. By the end of the day, the following appeared in this 'Parking Lot' list:

- 1) Establishment of a yearly consultation process to increase communication with the industry.
- 2) Question: how to capture anglers 65 years and older (when they don't need to purchase a fishing licenses).
- 3) Access to angler information from licenses – should be a disclaimer clause on license.
- 4) Complete analysis on the marketing budget in regards to visitation – make sure there is a link. There may need to be a review of allocation.
- 5) Concern: fishing operators having to sell fishing licenses. This causes them extra work and expenses.
- 6) An analysis of angling by NWT residents.
- 7) Results of NWTT's website use.
- 8) Concern: information about exit/retirement strategies for operators (it was understood by all that it was not NWTT'S role to provide training in this area).
- 9) Concern: border control. US anglers are being turned away at the border.
- 10) Concern: micro-site being developed for fishing in the NWT.

## Presentation of Studies

---

The morning of this one-day workshop was concentrated entirely on presenting the results of studies on the over-night fishing industry in the NWT. The study presented by Mr. Richard Zieba of ITI was the result of an analysis completed on data from Environics Analytics. Participants appreciated the wealth of quantitative information. Here is the Executive Summary given at the beginning of the presentation:

- Canadian non-resident and US anglers show significantly different trends over the past decade as permit-holders and lodgers.
- US angling and lodging had dropped significantly, while Canadians have had consistent rates of angling, and cyclical patterns for lodging.
- Both Canadian and US anglers are aging, but the pattern is stronger for Americans: younger lodgers and anglers may not come back, or come at all.
- In both countries, repeat anglers are older, more affluent and more geographically concentrated than first-timers.
- Key opportunities in Canada include building on a stable long haul market base, while exploring emerging short haul and long haul (young adults) opportunities.
- In the US, the opportunity may be to focus on the most elite anglers, though even these groups may be aging rapidly.

Following this presentation, Mr. Dennis Zimmerman presented the results of his qualitative research into the marketing of the over-night fishing industry in the NWT. The purpose of this research was to provide recommendations to NWTT for the marketing and promotion of this sector. This research was conducted through: interviews with a variety of lodge owners and stakeholders, review of secondary research, a competitor analysis, and critically reviewing relevant NWTT marketing materials.

Mr. Zimmerman highlighted a series of unique selling features, based on NWT's unique attributes, and concluded by defining market segments that NWTT should focus on. In summary, Mr. Zimmermann concluded that NWTT needed to:

- 1) Bring the excitement back into the NWT lodge fishing experience
- 2) Dial up the emotional appeal
- 3) Focus on the authentic nature of the product

After listening to both of these presentations, the following major comments or questions were raised:

- 2008 saw a noticeable increase in visitation from Northern Alberta. Participants are curious to know why. Maybe the mines were doing some targeted marketing in the area, or maybe some of the lodges.
- The trend in couples fishing was also seen as a possible opportunity.
- Barriers to fishing in the NWT were clear: cost of air travel and border control.

The results of both of these studies were used as a basis for the afternoon discussion on NWTT's future marketing strategy for the fishing industry.

## **Marketing Presentation**

---

Leading us into the afternoon discussion, Mr. Ron Ostrom from NWTT presented NWTT's present marketing initiatives specific to the fishing industry. Participants learned about their investment in print and television advertising.

They also learned about NWTT'S most recent investment, which will see the NWT advertised alongside a new fishing lure in over 250 stores across Canada. Mr. Ostrom went on to explain that an important social media campaign was also being planned in conjunction with this marketing opportunity. A micro-site is being developed where lodge owners are being asked to encourage their clients to submit pictures of their catch. These pictures will then be used to create a map of fishing in the NWT: where you can find which type of fish.

There was some concern expressed over this idea, as operators realized that not all of them have the resources to ensure their clients participate, which might lead to a false representation of the territory's fishing potential. It might also create negative competition between lodge owners. NWTT is being asked to look into these concerns further.

Throughout the afternoon's discussion, it became evident that NWTT needed to become more strategic in regards to its marketing efforts. It needed a long-term strategic plan, based on metrics, which would consider, amongst other things, trends and market segment development. It would also be important to identify different leverage opportunities in this plan, such as conference travel planning and planned mining developments. This strategic plan will also allow NWTT to plan its marketing investments over the long-term.

## Branding

---

After conducting research and analysing its results, the first step in establishing a marketing strategy is to establish a brand. A brand is a focused short message that conveys your uniqueness to your targeted public; it conveys the set of expectations, memories, stories that they can expect. Participants were asked to contribute their thoughts towards the beginning of this exercise.

It was explained that NWTT would continue using the “Spectacular” brand as the overarching message regarding the destination. However, a focused marketing message was needed in specialized marketing initiatives for the fishing industry. The fishing brand would, of course, have to respect or fit into the Spectacular brand. As one of the participants said, we therefore have to be careful not to ‘water down’ the Spectacular brand.

There was also some discussion around NWTT’s role and the role of the different lodge owners. NWTT has the responsibility to market the overall destination and the overall fishing sector. It is up to each business owner to develop his or her unique selling proposition or brand and marketing strategy. As it was said: NWTT lures them in, the lodges catch them!

Finally, it became evident that anglers have a very focused approach when looking for a fishing destination. They know what they are looking for and are not interested in generally exploring a destination. They need to quickly be able to find specific information regarding types of fish, the location, and the type of services (accommodation, etc.). NWTT therefore needs to present the NWT’s fishing industry in a much more targeted and accelerated way.

After much discussion, the participants were able to zero in on the task at hand, which was to give NWTT and their Agency of record, Kellett Communications, the starting points to create a fishing brand. To begin, participants were asked to validate Mr. Zimmerman’s unique fishing attributes regrouped under four selling propositions. These can be found in Table 1. All participants agreed with Mr. Zimmerman’s presentation, but chose to add to his description. These comments can also be found in Table 1 (page 7).

**Table 1: Unique selling features of the NWT**

<p><u>Natural Features</u></p> <ul style="list-style-type: none"> <li>• Large, clean lakes</li> <li>• Pristine natural environment</li> <li>• Clean air and clean water</li> <li>• Fish under the Aurora</li> <li>• Fish under the midnight sun</li> <li>• Unique northern wildlife</li> <li>• Wild, pure, untouched</li> </ul>	<p><u>Lodge Elements</u></p> <ul style="list-style-type: none"> <li>• Lodge culture</li> <li>• Belonging and camaraderie</li> <li>• Informality of northern hospitality</li> <li>• On your own schedule, on your own lake</li> <li>• Reputable operators with decades of experience</li> <li>• Authentic northern characters</li> </ul> <p><b>Additions by participants:</b></p> <ul style="list-style-type: none"> <li>• Family and friends</li> <li>• Memories</li> </ul>
<p><u>Experiential Elements</u></p> <ul style="list-style-type: none"> <li>• Lack of sound, peace and quiet</li> <li>• Remoteness</li> <li>• Authentic northern culture</li> <li>• Undiscovered</li> <li>• Fish around the clock</li> <li>• Personal challenge</li> <li>• Sense of accomplishment</li> <li>• Physical adventure</li> <li>• Experiencing nature without or with a guide</li> <li>• Slower pace North of 60</li> <li>• No experience necessary – simplicity</li> </ul> <p><b>Additions by participants:</b></p> <ul style="list-style-type: none"> <li>• Bigger, better, wilder</li> <li>• Fulfilling dreams</li> <li>• Safety</li> </ul>	<p><u>The Fish and Fishery</u></p> <ul style="list-style-type: none"> <li>• Catch and release history</li> <li>• Quality of the fishery</li> <li>• Healthy, great-tasting fish</li> <li>• Trophy-size Lake Trout</li> <li>• Trophy-size Northern Pike</li> <li>• Consistent trophy-sized fish</li> <li>• Environmental stewardship</li> <li>• Fast-and-furious fishing</li> <li>• Ease of locating fish</li> <li>• Fish virgin waters and find new “holes”</li> <li>• Wild fish</li> </ul> <p><b>Additions by participants:</b></p> <ul style="list-style-type: none"> <li>• Excitement of site fishing</li> <li>• Personal best – big fish (this resembles Mr. Zimmerman’s ‘Sense of accomplishment’ in Experiential Elements)</li> <li>• Quantity of fish</li> </ul>

It also became evident that most other fishing destinations would probably have a similar list. The difficult task was to narrow this list down to the most prized elements of the NWT fishing industry. The question posed to participants was: *Why choose to fish in the NWT?* The following was the first list, in no particular order:

- Pristine Natural Environment
- Unique Northern wildlife
- Bigger better wilder

- Excitement of site-fishing
- Quality and quantity of fish
- Big fish – personal best
- Safety
- Authentic northern culture (programming)
- Personal challenge
- Fulfilling dreams
- Belonging and camaraderie

Again, participants were asked to narrow this list down further to three or four choices by thinking of the answer to *Why fish in the NWT?* The following is the final result:

- Consistency of the fishing and the quantity of fish (8 votes)
- Big fish – personal best (7 votes)
- Unique northern wildlife (3 votes)

These three elements are what the participants feel truly differentiates the NWT from any other fishing destination. These elements are therefore the starting point in the development of a brand and of a marketing strategy, which will aim to increase visitation to NWT lodges.

Once a brand is developed, it will need to be tested in proposed market segments.

## Market segments

---

Participants understood the importance of knowing and targeting market segments. Marketing dollars are few, which makes it even more important to have a targeted approach in regards to markets.

For this part of the discussion, participants were asked to validate Mr. Zieba's description of market segments:

- Road Trippers (rural, middle-class living in short haul communities)
- Younger Explorers (singles & couples, includes the young at heart, multi-generational, bucket-listers)
- Maturing Lodgers (midscale, empty nesting & mature)
- Sportsmen (comfortable middle-aged, bedroom communities, outdoor enthusiasts)
- Long Haul Money (elite, upper class)

A full description of these market segments can be found in Mr. Zieba's research.



After some discussion to make sure everyone understood the descriptions, lodge owners were asked which market segment typically visits their lodges. After a round-table discussion, it seemed that the majority of lodges focused on an elite, upper-class clientele (Long Haul Money). Table 2 offers a breakdown of the results of the discussion.

**Table 2: Breakdown of market segment visitation to NWT lodges**

<b>MARKET</b>	<b>1<sup>st</sup> clientele</b>	<b>2<sup>nd</sup> clientele</b>	<b>3<sup>rd</sup> clientele</b>	<b>None or very few</b>
Long Haul Money	6 lodges	1 lodge	1 lodge	2 lodges
Maturing Lodgers	3 lodges	1 lodge	2 lodges	4 lodges
Sportsmen	3 lodges	5 lodges	0 lodges	0 lodges
Road Trippers	0 lodges	1 lodge	2 lodges	6 lodges
Younger Explorers	0 lodges	1 lodge	0 lodges	9 lodges

There was also a big discussion of whether NWTT should invest money into marketing the NWT in the United States, particularly since there is a limited budget and given the challenges previously identified, such as very strict border controls. More than half of the lodge owners present felt that some targeted investment in the mid-west of the United States was warranted. It was felt that participating at MCIT was a good investment. Most everyone thought NWTT should continue to invest in marketing with Canada, and more specifically capitalize on the recent successes of Northern Alberta.

## Next Steps

---

Before the meeting ended, both ITI and NWTT explained the next steps towards revitalizing the fishing industry. Mr. Richard Zieba explained that they were preparing a very important survey, which is done every four years, the Exit Survey. Because of privacy issues, they are not allowed to directly contact people who have purchased a fishing license without their consent. They are therefore proposing to send to operators a permission list, which their clients could sign to give their consent to be contacted for a survey. Operators agreed to collaborate, as long as it remained one list and not one form per client. Mr. Zieba also mentioned that the federal Department of Fisheries & Oceans is also conducting a survey and the GNWT was hoping to have access to this information.

NWTT also committed to continue working to revitalize the fishing industry. The incoming Executive Director, Ms. Cathie Bolstad, committed to the following:

- Sending out this final report to all participants

- Preparing and sending a plan of fishing marketing investments for the 2014 season to all participants by the end of April
- Sharing this final report with its board, including the items in the parking lot

## Conclusion

---

With five minutes remaining, participants reviewed the objectives of the meeting and their initial expectations. There seemed to be a general consensus that the meeting was fruitful and that everyone's expectations were met. We did run out of time to allow operators to start reflecting on their individual marketing strategies, which would have allowed them to network at the same time. However, considering everything that was accomplished, participants seemed satisfied with the outcome.

Participants also decided not to stay longer and discuss the budgeting and investments made in the fishing industry by NWTT. They felt their answers were answered throughout the day and were confident that NWTT would follow up on their commitments.

In conclusion, this was a very successful consultation, one that should be repeated annually. NWTT has what it takes to establish a new marketing initiative that would aim to increase visitation to fishing lodges while continuing to revitalize the fishing industry.

### **For more information:**

Sylvie Francoeur

AYNI Conceptions

[Sylvie@ayni.ca](mailto:Sylvie@ayni.ca) or 867-766-4804 or 867-446-9363

[www.ayni.ca](http://www.ayni.ca)