

NON-RESIDENT ANGLING RESEARCH

Government of Northwest Territories
Richard Zieba, Director Tourism & Parks

Fishing Lodge Workshop
Yellowknife, March 28, 2014



Agenda

1. Review objectives and high level findings
2. Review of Data Used
3. Trend Analysis - Canada
4. Trend Analysis - US
5. Conclusions & Considerations
6. Discussion & Next Steps



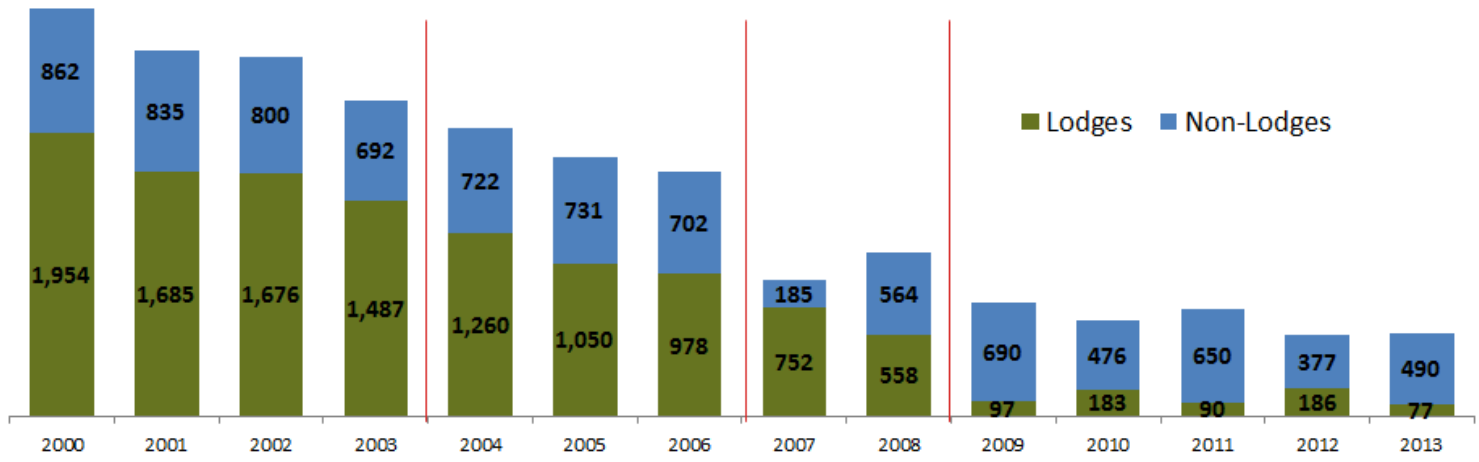
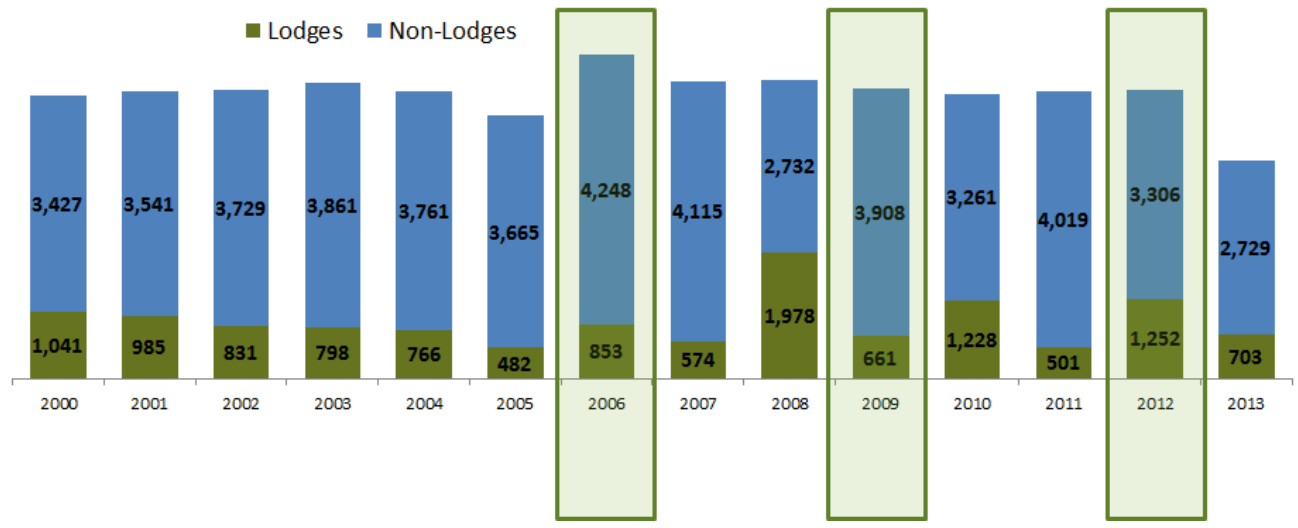


Executive Summary

- Canadian non-resident and US anglers show significantly different trends over the past decade as permit-holders and lodgers
- US angling and lodging has 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 adult) opportunities
- In the US, the opportunity may be to focus on the most elite anglers, though even these groups may be aging rapidly



Canada Maintains While US Drops

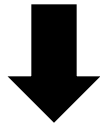


Review of Data Used

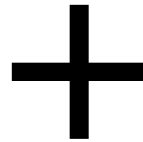


How was this done?

GNWT fishing license data

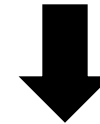


Identified NWT non-residents & their location of residence

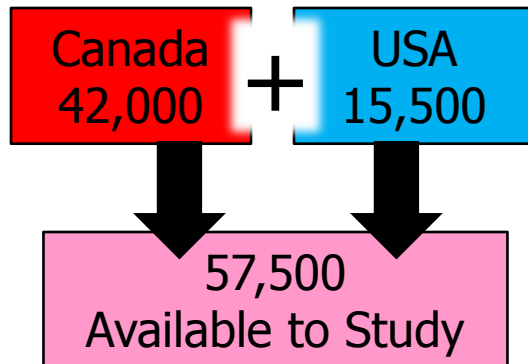


PRIZM

A system that combines demographic, consumer behaviour, and geographic data.



Provides insights to customers & markets





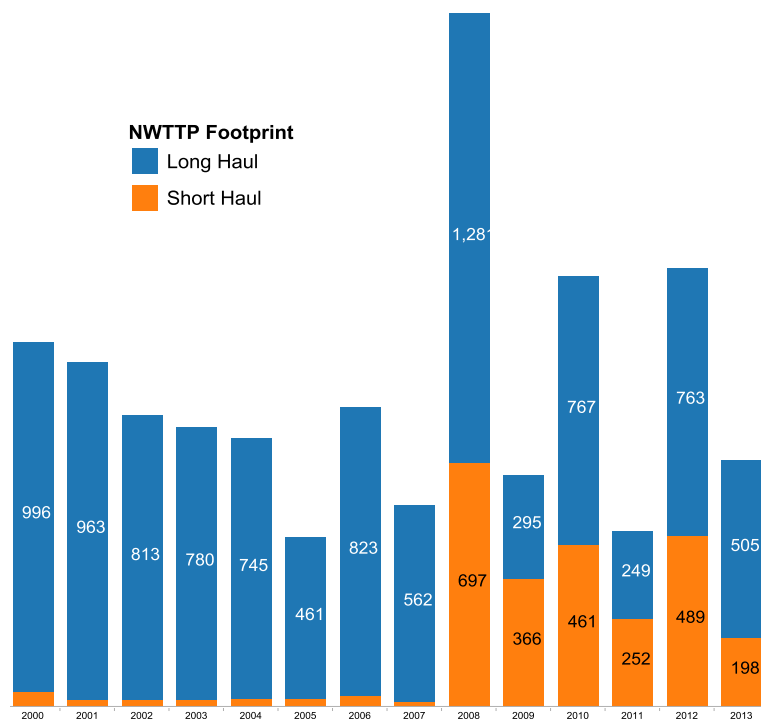
Inconsistencies with lodge level data



Investigation into the peaks and valleys of lodge anglers in even years, indicates that some lodges have inconsistent visitation (see example of some lodges below)

2000	2001	2002	2003	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	Total
1,041	985	831	798	766	482	853	574	1,978	661	1,228	501	1,252	703	12,653
210	189	183	173	125	10	159	31			27		164	453	1,724
20	16	19	30	16	14	18	46	868	173	129	120	104	27	1,600
117	179	127	108	180	43	184	78	4	29	386	58	50	20	1,563
100	103	71	81	106	105	116	137		4		100	541	26	1,490
136	158	138	102	82	68	57	45	207	54	55	46	48	8	1,204
68	63	57	58	70	50	48	25	454	59	61	48	41	33	1,135
80	30	17	30	15	18	24	12	2	78	173	34	27	23	563
104	67	28	33	38	38	68	56			4	2	116	8	562
17	15	11	3	3	3	4	2	133	32	39	31	26	4	323
39	46	22	30	23	26	22	39	57	6	3	3	6	1	323
23	9	13	32	32	9	19	5	92	21	12	7	12	7	293
13	28	14	22	16	14	11	10		89	28	8	5	3	261
		14	2	4	2	6	3	142	18	8	6	8	8	221
3	11	10	5	3	13	15	18	1	1	89	5	7	4	185
2	5	25	22	21	22	46	12			13			1	169
41	21	20	6	4	7	4	4	18	6	10	4	12		157
7	2	8	4	4	3	5	1		87	14	9	9	3	156
						8	29		2	98	2	5	6	150

Lodge Anglers By NWTP Footprint

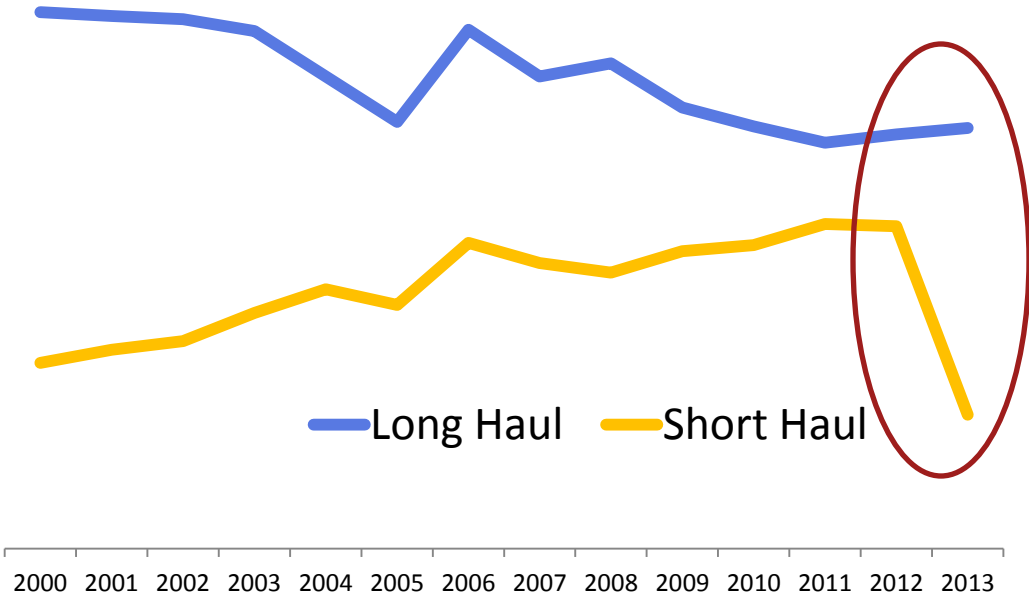




Unusual short haul decline in 2013



A big decline in the short haul market in 2013 is worth investigating.
It seems like that may be a function of some suppliers not being represented



Out of territory locations have inconsistent fishing license data in 2013

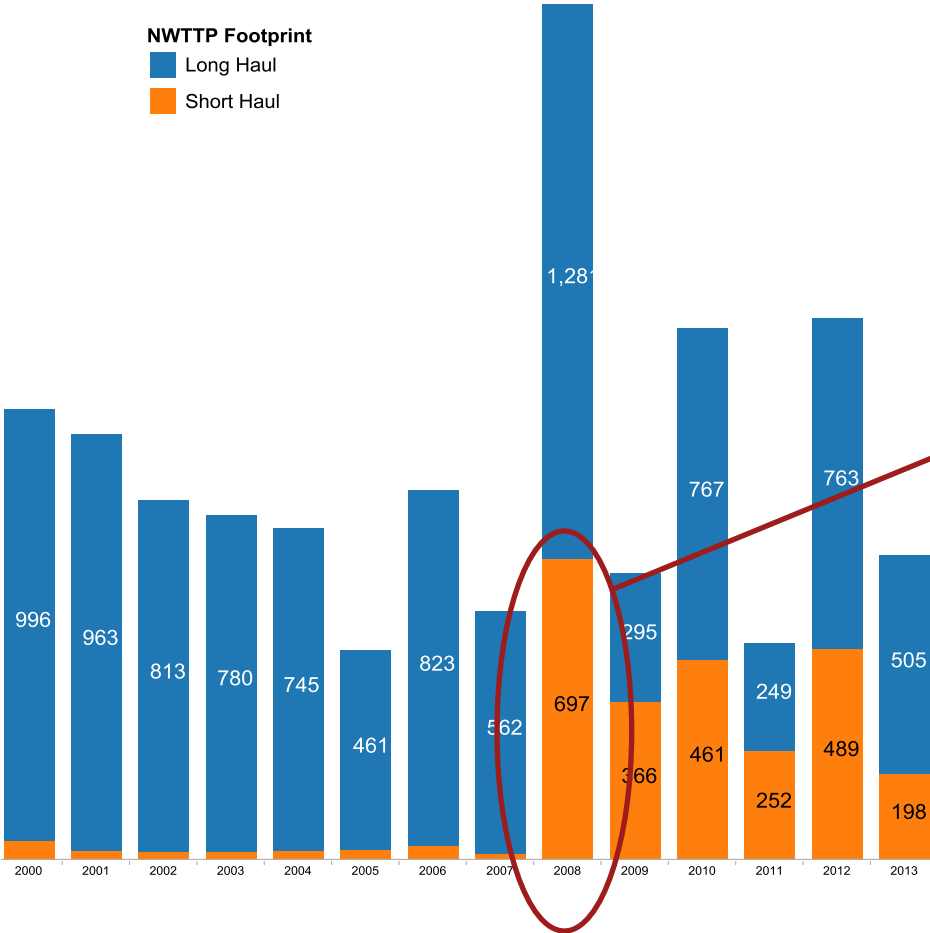
Year		
2011	2012	2013
4	275	15
4	232	23
151	199	16
200	167	55
592	99	42
6	86	6
83	80	13
	79	113
	71	7
75	68	12
74	64	27
39	46	5
44	42	7
30	41	5
163	36	7
38	34	12
	29	3
33	27	6
27	26	15
28	23	3
23	21	8



Canadian short haul lodgers jump in 2008



Short Haul visitors appear to have started visiting lodges in 2008 with over half of these licenses originating in La Crete



Individuals from La Crete and High level have accounted for a large majority of lodge issued permits since they started coming in 2008

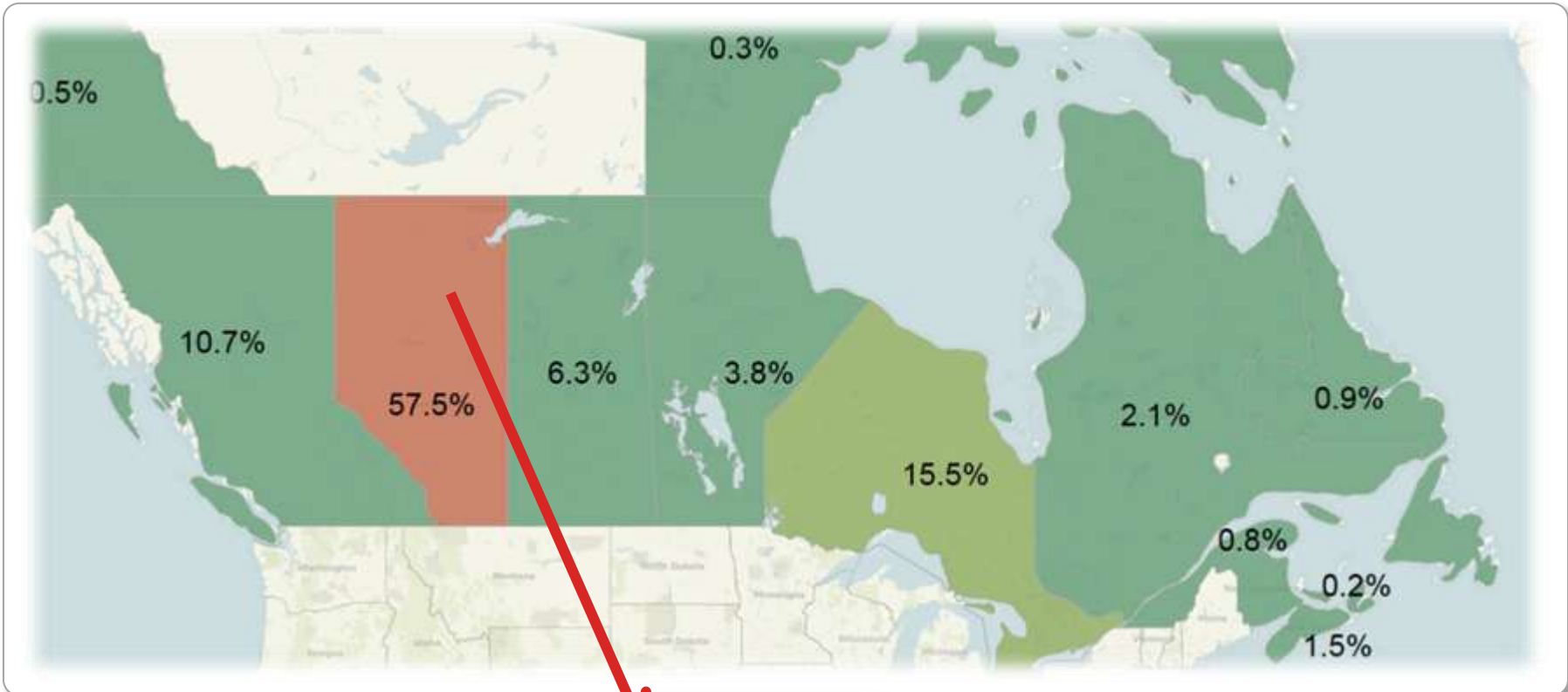
City	2008
LA CRETE	56.8
HIGH LEVEL	10.6
FORT VERMILLION	7.0
GRANDE PRAIRIE	5.0
MANNING	2.6
PEACE RIVER	2.2
FORT NELSON	1.7
FORT MCMURRAY	1.4
FORT ST. JOHN	0.9



The Lay of The Land Non-Resident Canadian Anglers



Alberta represents nearly 60% of non-resident Canadian anglers



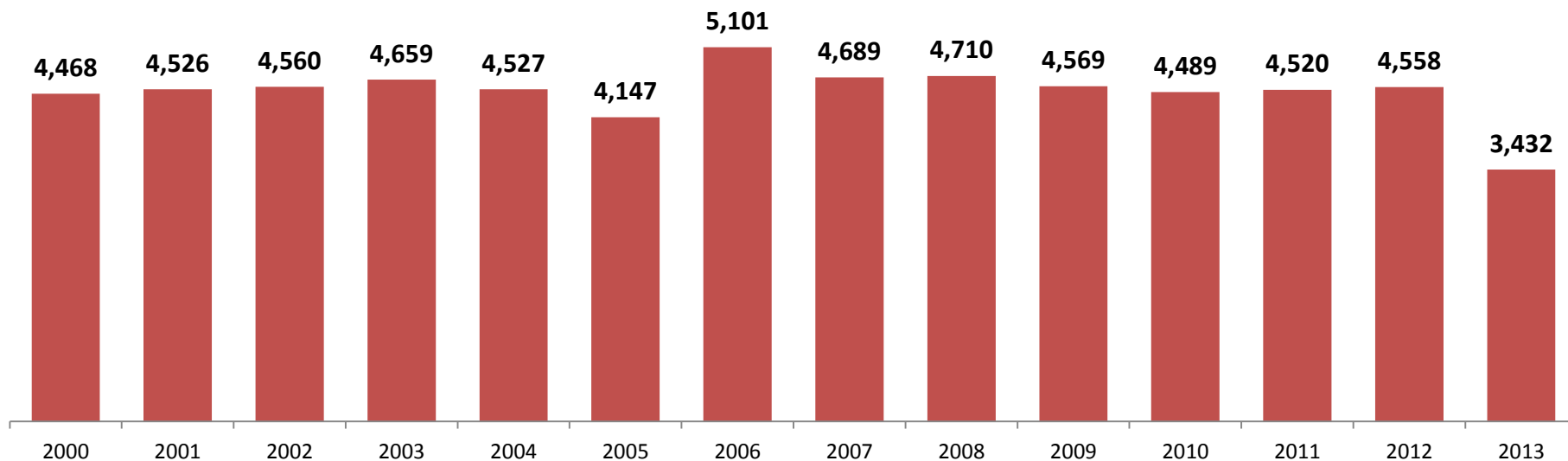
11,105 (26.4%) of Unique Licensees Reside in the Short Haul Market



Canadian Anglers Over Time



With the exception of 2013 the number of Non-Resident Canadian Anglers has not changed too much over time



Anglers Over Time – By Age

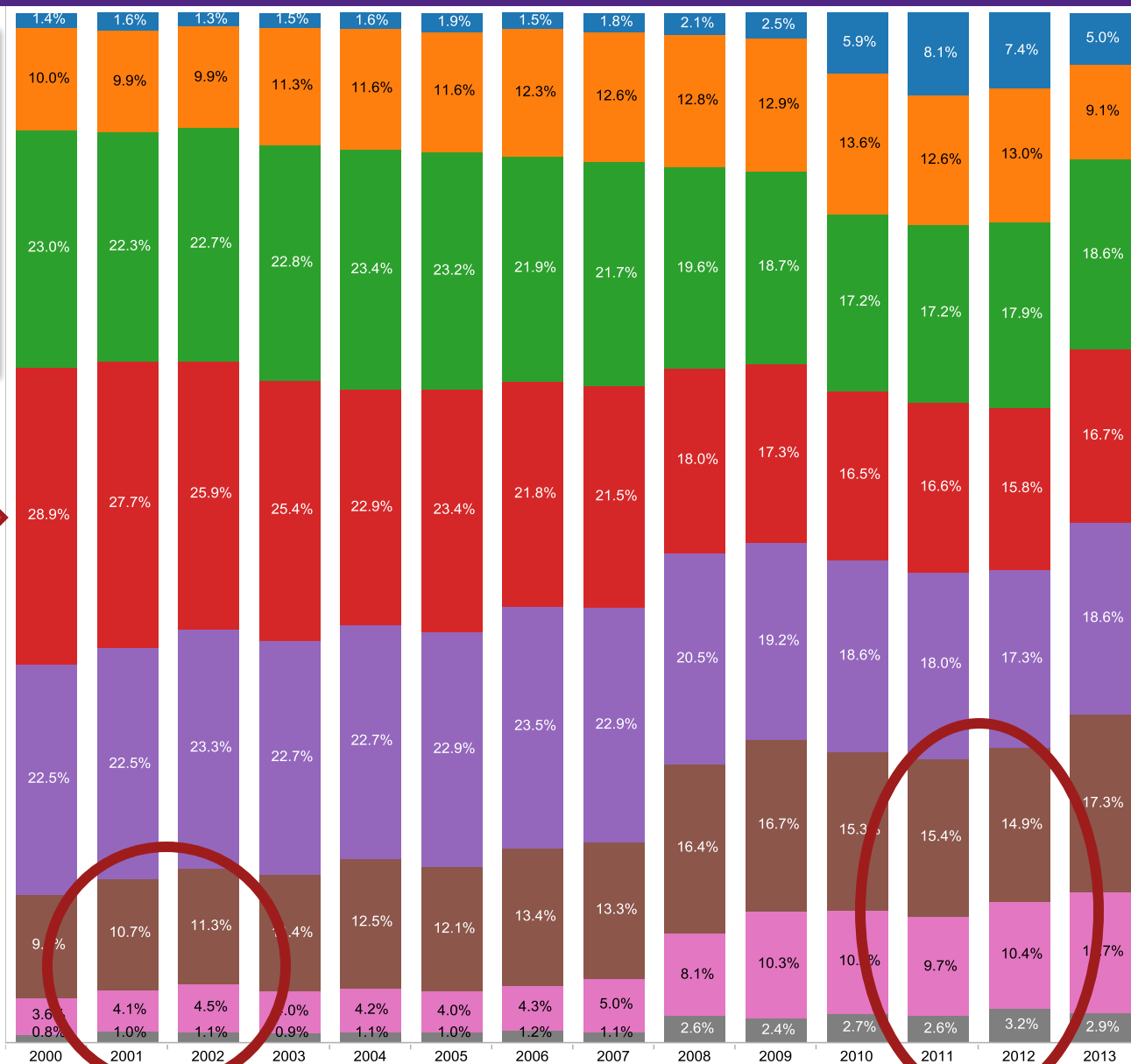


Legend

- Under 16
- 16-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75+

Middle-aged groups (35-54) have dropped off at higher rates

Older groups are steadily becoming a large percentage of anglers, but with an increase in younger people there is an indication that they may be travelling with family (multi-generational trips)





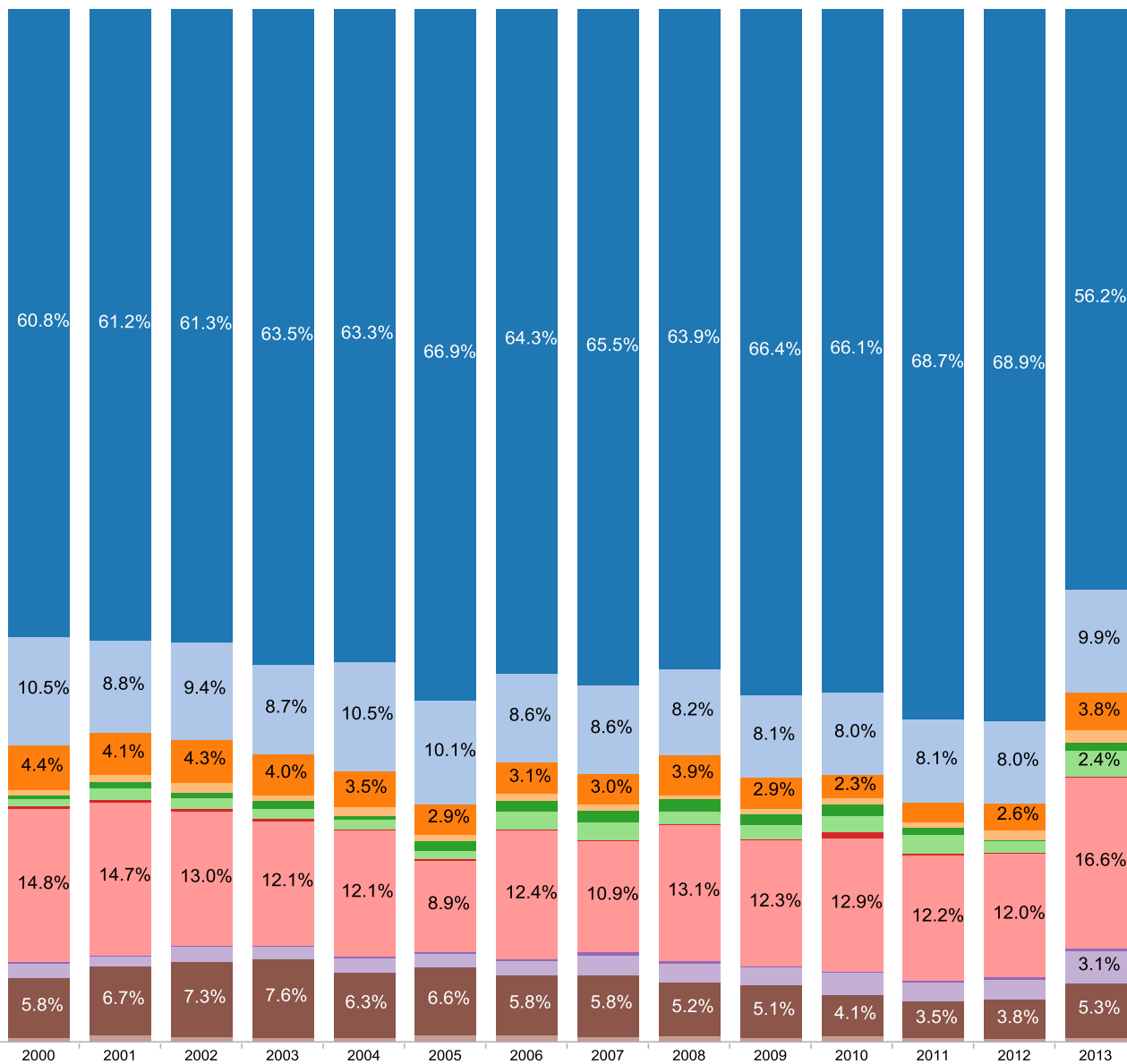
Anglers Over Time – By Province



Legend

Province

- Alberta
- British Columbia
- Manitoba
- New Brunswick
- Newfoundland and Labrador
- Nova Scotia
- Nunavut
- Ontario
- Prince Edward Island
- Quebec
- Saskatchewan
- Yukon



Alberta residents have steadily increased to nearly 70% of all non-resident Canadian anglers in 2012

British Columbia has sent fewer anglers to NWT over the years; a similar trend has occurred in Saskatchewan; however SK and MB comprise about 10% of market



Meet The Non-resident Canadian Angling Target Segments



Sportsmen

- Anglers from comfortable middle-aged families living in bedroom communities
- Avid anglers and campers within NWT, using angling lodges at above average rates and overall angling has not tailored off in more recent years



Road Trippers

- Anglers from middle-class rural situations, many living in short haul communities but exist throughout the country as well
- Heavy anglers who are not always using lodges but have at increasing rates since 2008



Maturing Lodgers

- Midscale empty nesting and mature anglers living in more rural settings throughout Canada
- Though they have a propensity to fish in NWT; they are moderate lodgers overall and have not angled at as high of rates in more recent years



Long Haul Money

- Some of Canada's elite, living in Canada's largest cities and their more affluent suburbs; may be reaching empty nesting stages of life
- With money to spend the lodge angling adventure is attractive to this group; may desire a very personalized and unique experience



Younger Explorers

- Younger singles & couples, as well as the young at heart, living in rented spaces in first and second tier cities
- Though they typically don't return for multiple trips they do look for unique experiences that offers them a variety of activities from culture to physical activity



SPORTSMAN

- Anglers from comfortable middle-aged families living in bedroom communities
- Avid anglers and campers using angling lodges at above average rates and overall angling has not tailored off in more recent years

Tools & Trucks

- Upper-middle-class families & couples living in small & rural towns
- Blue collar workers who lead casual lifestyles
- Fond of Nature – free time spent outdoors – camping, power boating, snowmobiling, use their trucks to haul campers & recreation vehicles to explore parks

Mr. & Mrs. Manager

- Upscale, dual income households & live in the exurban sprawl beyond the nation's largest cities.
- Executives who like toys: boats, campers, snowmobiles and collections of sporting equipment.
- Families and couples enjoy outdoor activities like golf, skiing, power boating and canoeing.
- Enjoy their exurban settings, preferring to go camping over seeing an opera.

Fast Track Families

- Upper middle class exurban families, middle aged, married, enjoy array of activities – fishing, hiking, camping, adventure sports.

White Picket Fences

- Young, middle-income exurban families, working class families, headed by single parent household, enjoy outdoors – fishing, mountain biking, use credit liberally.

Upward Bound

- Upper middle class, middle age suburban families with older children, like to control much of the life as possible.



Long Haul Money

- Some of Canada's elite, living in Canada's largest cities and their more affluent suburbs; may be reaching empty nesting stages of life.
- With money to spend the lodge angling adventure is attractive to this group.
- May desire a very personalized and unique experience.

Cosmopolitan Elite

- Very wealthy (entrepreneurs and heirs to old money) middle age older families and couples.
- Concentrated in established neighbourhoods, such as Montreal's Westmount, Toronto's Forest Hill, Calgary's Mount Royal, and West Vancouver.
- Support the arts and frequent the opera, ballet, symphony and theatre.

Suburban Gentry

- Wealthy, middle-aged suburban families and couples living in the suburbs.
- Professional tone - dual-income couples who often have university degrees and large families, typically with teens or university-aged children.
- Take pride in their healthy lifestyle.

Urban Villagers

- Wealthy, middle-aged urban married couples with university degrees and university-aged children.
- Includes a significant percentage of European, Asian and Middle Eastern immigrants.
- Enjoy vacation cottages and boats, trips abroad and tickets to professional sporting events.

Money and Brains

- High income, urban, educated couples and families with sophisticated tastes.
- Empty-nesters or married couples with university-aged children.
- Subscribe to travel magazines.



ROAD TRIPPERS

- Anglers from middle-class rural situations, many living in short haul communities but exist throughout the country as well
- Heavy anglers who are not always using lodges but have at increasing rates since 2008

Big Sky Families

- Middle-aged and scattered across the Prairies and other rural areas.
- Highest concentration of farmers in Canada.
- Leisure time spent outside, hunting, fishing, snowmobiling and ice skating.
- Travel infrequently and, when they do, they stay close to home, stopping at campgrounds or visiting the homes of friends or relatives.
- Owning pickup trucks, recreational vehicles, snowmobiles and ATVs

New Homesteaders

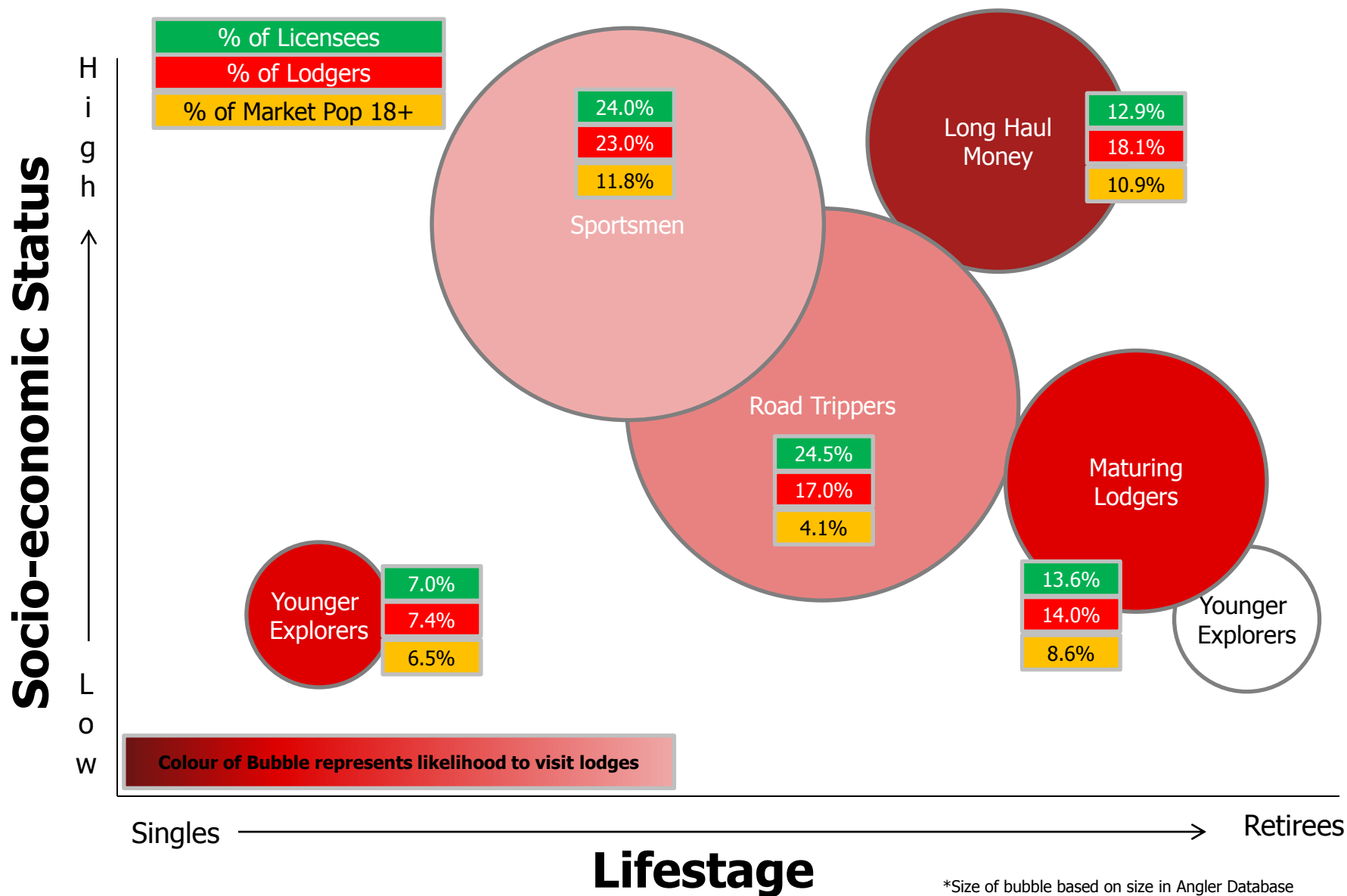
- Middleclass couples and families seeking comforts of small-town living.
- Casual outdoor lifestyles – campers, power boats, snowmobiles, and ATVs.
- Will travel long distances to enjoy kid-friendly activities – national and state parks.
- Risk adverse in financial matters and protective of their children.

Exurban Crossroads

- Younger, middle-class households with lots of children, living in small cities and satellite towns.
- Well-paying blue-collar and service sector jobs with average incomes and outdoorsy lifestyles.
- Enjoy camping, boating, skiing and visiting national and provincial parks.



Canadian target groups represent 82% of all anglers



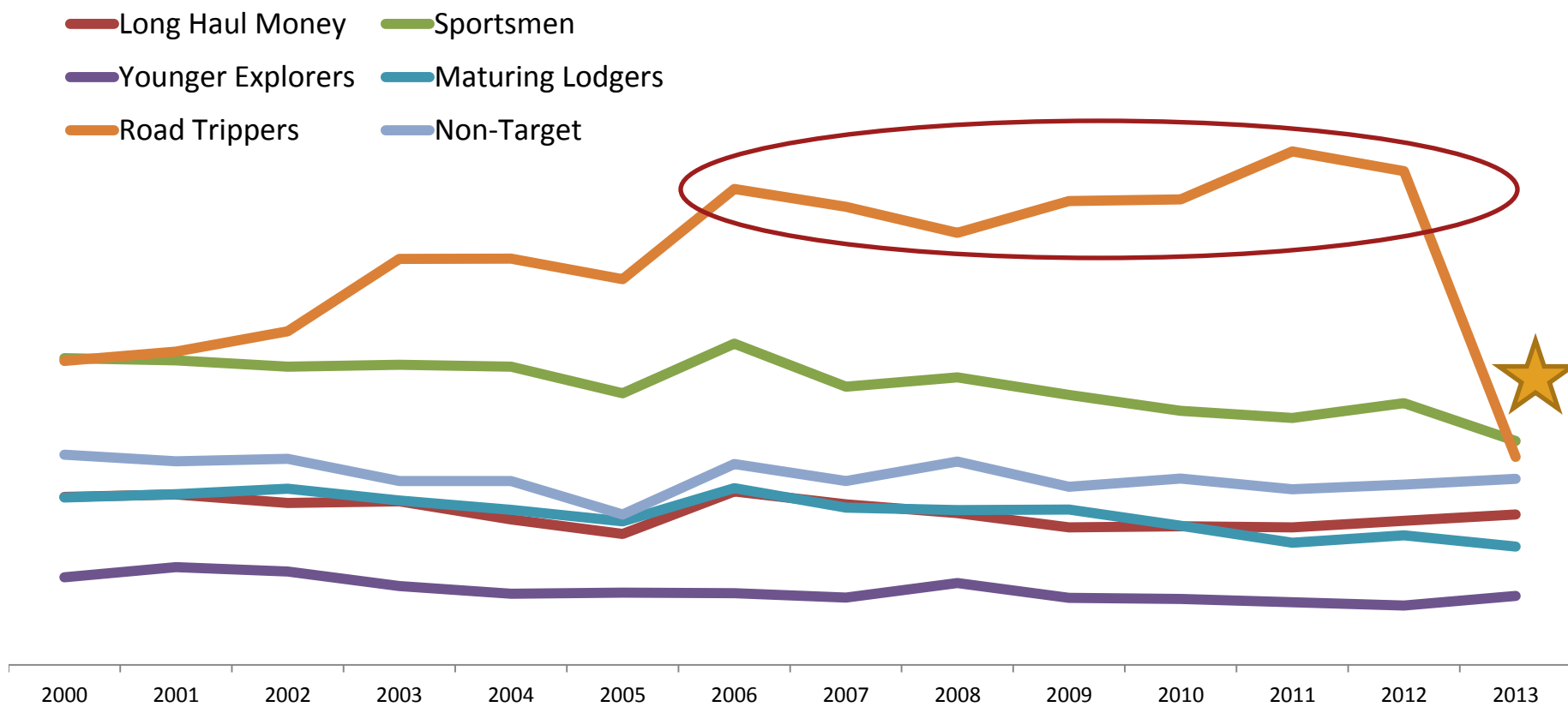
*Size of bubble based on size in Angler Database



Canadian target group distribution consistent over time



In 2013 there was a sharp decline in of the Road Trippers, a short haul market, after a period of steady increase



Sharp drop in 2013 mirrors overall short haul drop and may be a sign of data inconsistency or omission

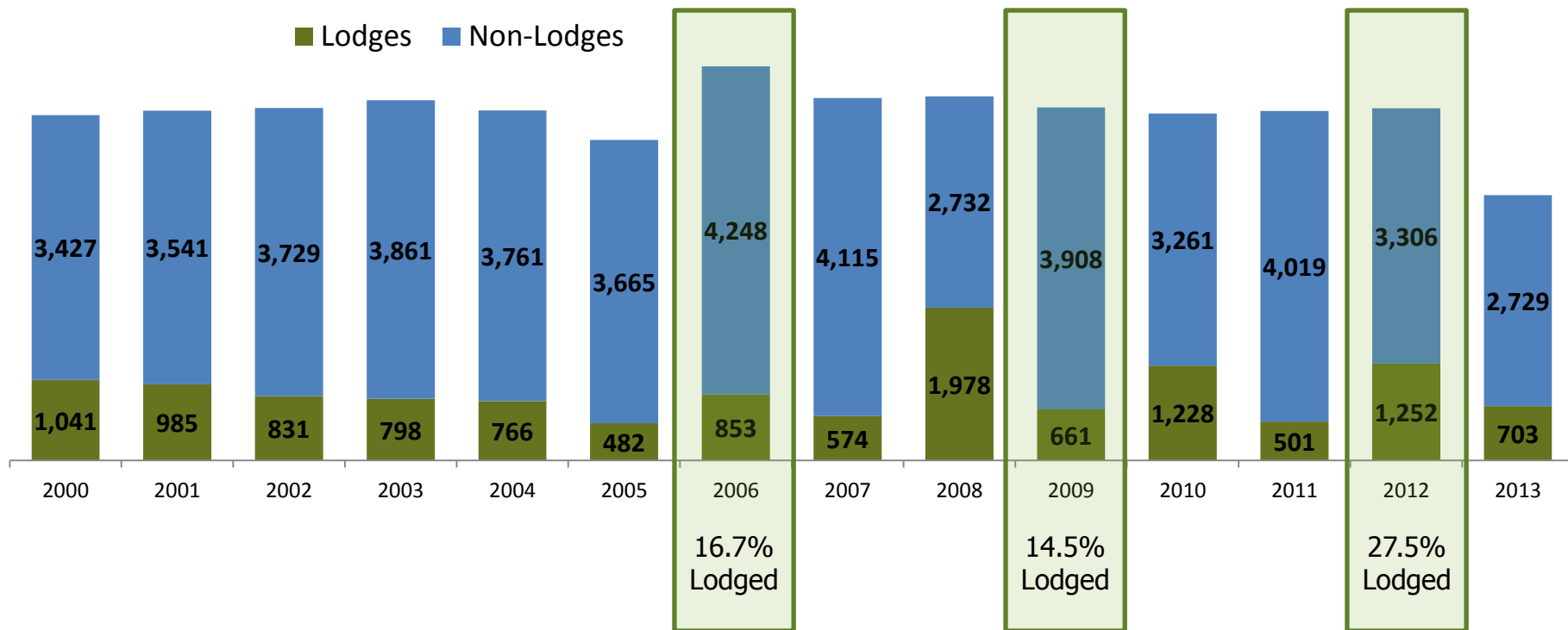
Canadian Lodge Angling Analysis



Canadian Anglers Over Time

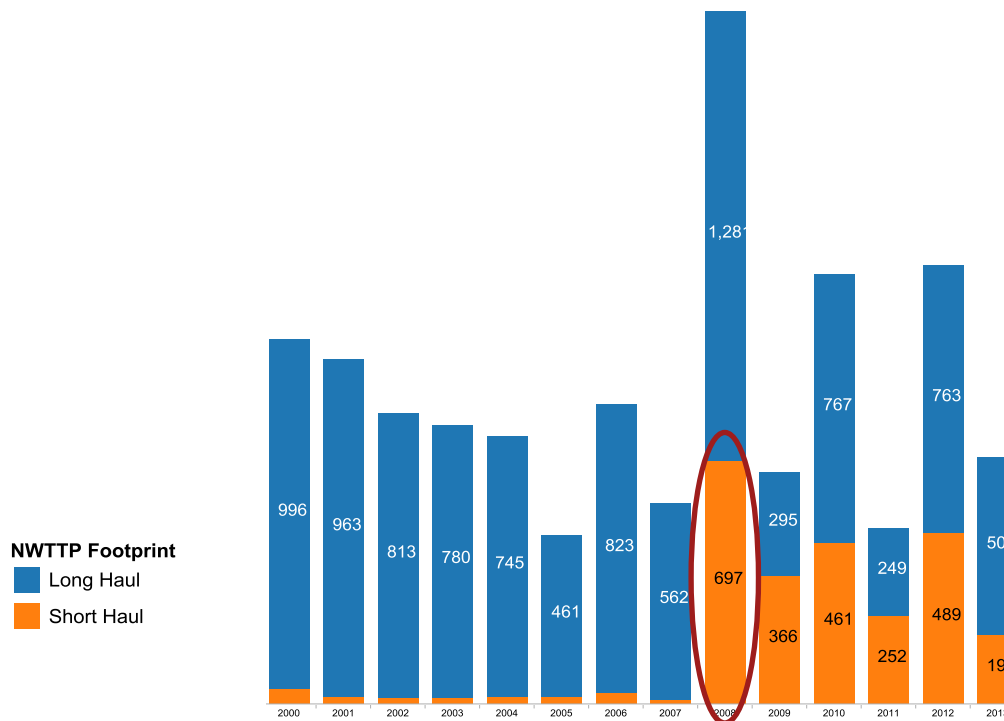


With the exception of 2008 (42%), 2010 (27%) and 2012 (28%); 15-20% of all fishing licenses were issued by a lodge



We will take a deeper dive into three static years to best understand who has come, who has come back and who has come recently

Lodge Anglers By NWTTP Footprint



- Short-haul anglers, almost non-existent as lodgers before 2008, appear to be lodging at significant rates from 2008 onward
- A large proportion of these anglers are coming from Northern Alberta (Grand Prairie, Peace River, Manning, High Level)
- Validating the lodging habits of these short haul families is an important next step for NWTTP and territorial lodge owners



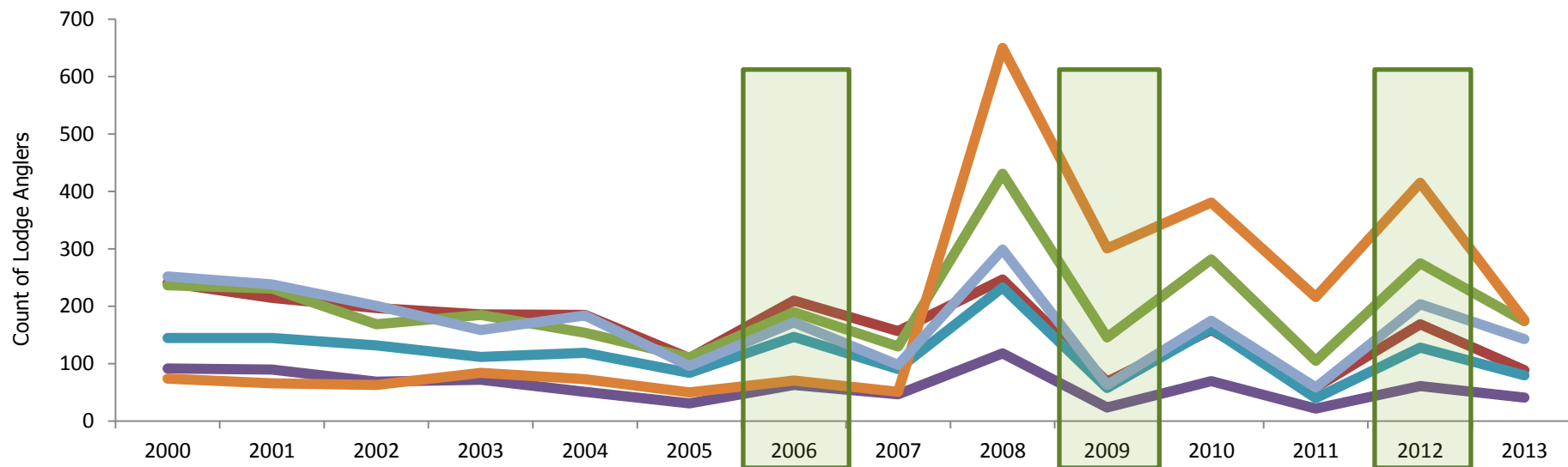
Cyclical trend seen across all target groups



Sportsmen are consistently one of the most prevalent lodge anglers

All Anglers

- Long Haul Money
- Younger Explorers
- Road Trippers
- Sportsmen
- Maturing Lodgers
- Non-Target



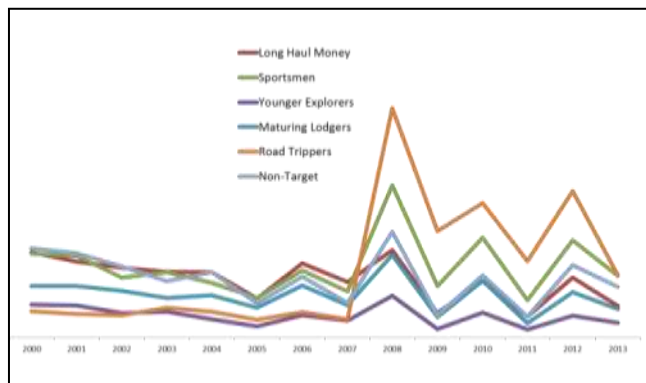


Shifts in rates of lodging among Canadian target groups



Lodge Anglers by Target Group

- Rates of lodging have increased among Sportsmen and Road Trippers from 2006-2012
- Long Haul Money are most likely to lodge and the rate in which they do has bounced back in 2012 after a dip in 2009



% of All Anglers

% of Anglers who lodged

	Long Haul Money	Sportsmen	Younger Explorers	Maturing Lodgers	Road Trippers	Non-Target
2006	12.2% 33.7%	22.6% 16.5%	5.1% 24.4%	12.5% 23.2%	33.5% 4.2%	14.2% 23.8%
2009	10.8% 14.0%	21.2% 15.1%	5.3% 10.0%	12.2% 10.4%	36.5% 18.1%	14.0% 9.8%
2012	11.4% 32.6% —	20.6% 29.3% ↑	4.7% 28.6%	10.2% 27.5%	38.9% 23.4% ↑	14.2% 31.5%

Lodge Anglers Over Time – By Age



Legend

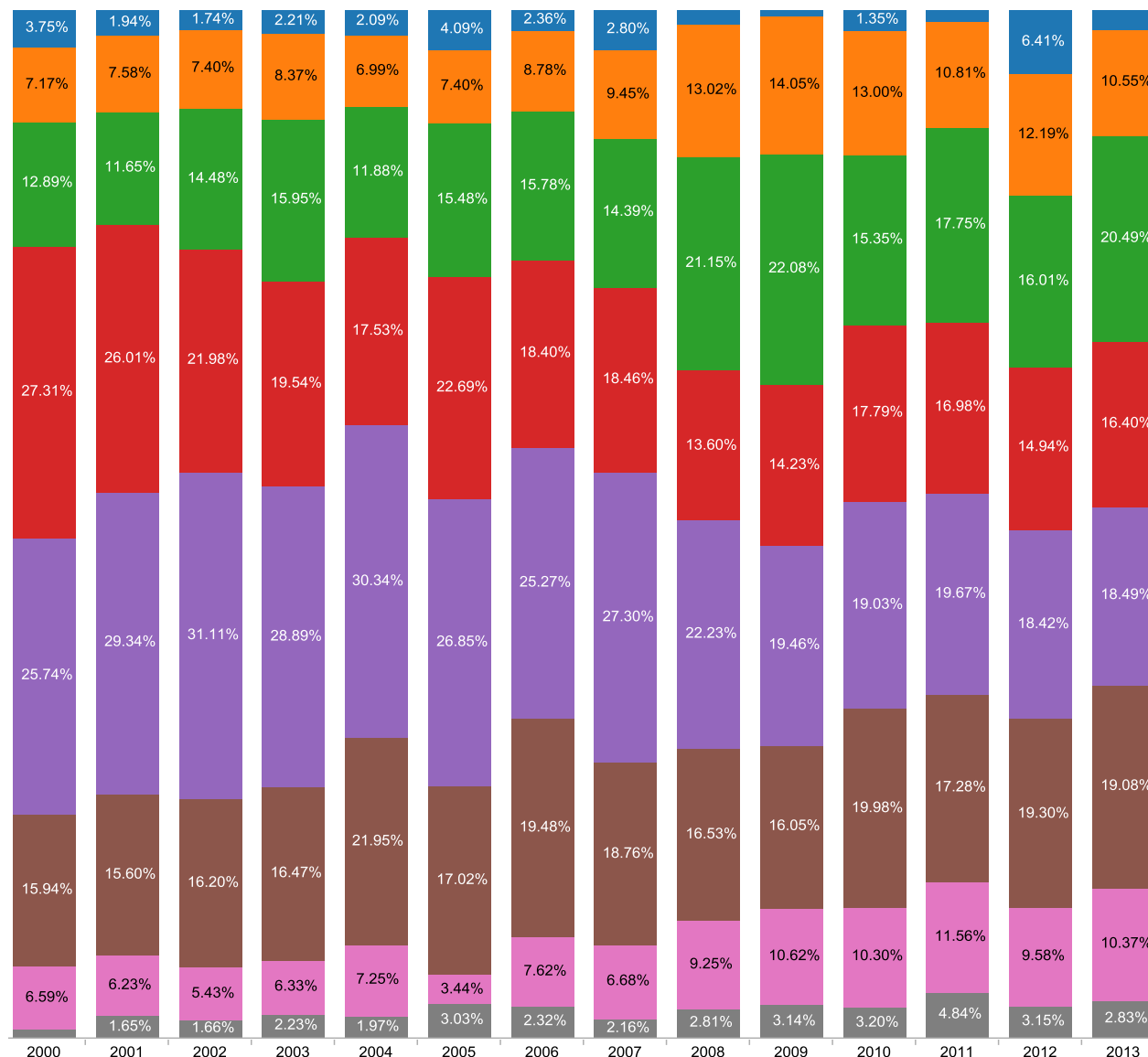
- Under 16
- 16-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75+

2002: 23%
2012: 30%

Lodge anglers are getting older, though not as quickly as all NWT anglers

Middle-aged lodge anglers now represent a smaller percentage of all lodge anglers

Compared to 10 years ago, a larger percentage of lodge anglers are between 16 and 34



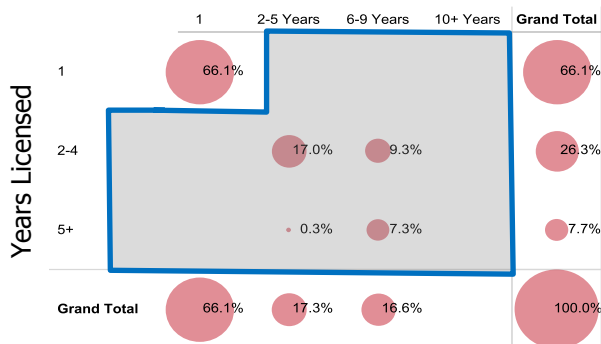


What were lodge anglers like when they came?



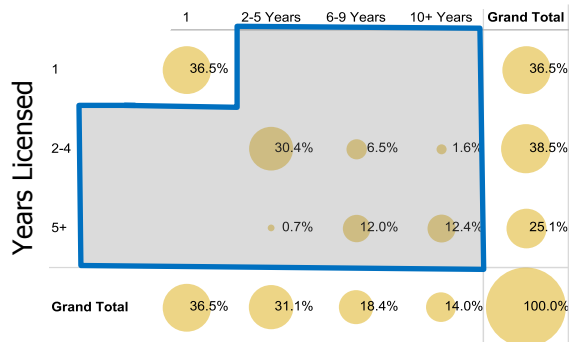
2006

Length of Relationship



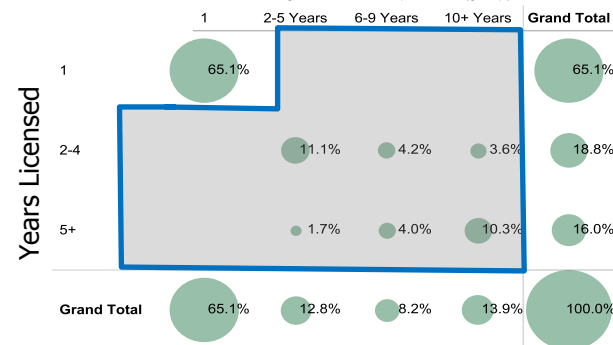
2009

Length of Relationship

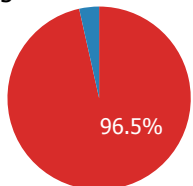


2012

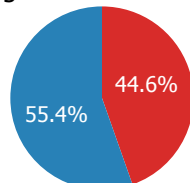
Length of Relationship



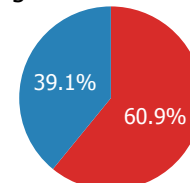
Long Haul Short Haul



Long Haul Short Haul



Long Haul Short Haul



- About two-thirds of all lodge anglers were first time NWT anglers in 2006 and 2012
- 2009 was a very different year in that a greater number of lodge anglers (64%) had obtained licenses in a previous year

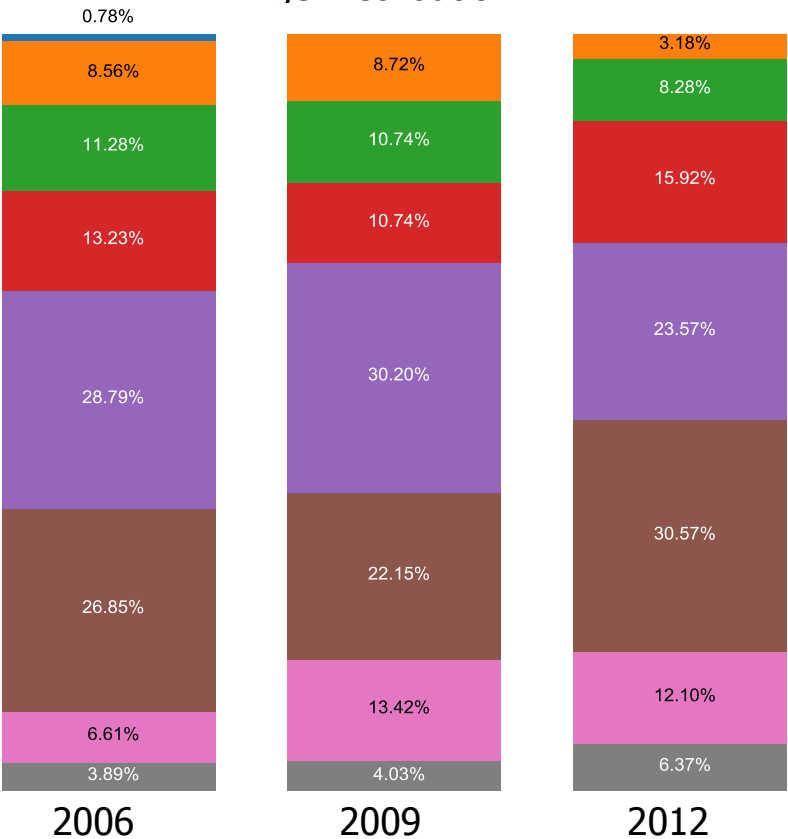
The following analysis will concentrate on the long haul Canadian lodge angler who previously angled in NWT



Long haul repeat lodgers: Age and Target Group



Age Distribution



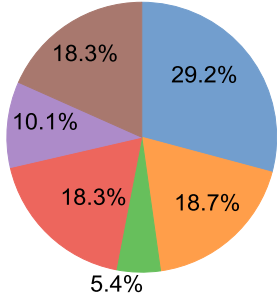
Legend

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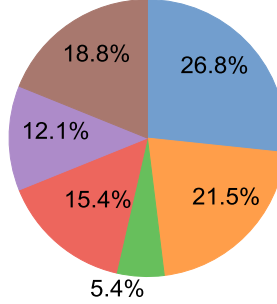
Target Group Distribution



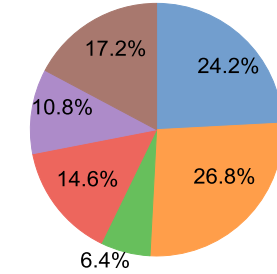
2006



2009



2012



- Those from the long haul, that have been licensed before, are getting older: 49% over 55 in 2012
- Not many lodgers under 35 angling more than once
- Middle Age anglers (45-54), overall, are a smaller piece of the peat anglers: 29% in 2006 to 24% in 2012

- Overall, consistent target group composition from year to year
- Long Haul Money consistently make up about one-quarter of repeat lodgers, but are slowly decreasing
- Sportsmen have increased in share of repeat lodge angling from the long haul market



Long haul repeat lodgers: Markets and Lodges



Province	2006	2009	2012
Alberta	42.8%	58.4%	61.2%
British Columbia	8.2%	5.4%	7.6%
Manitoba	11.7%	5.4%	3.2%
New Brunswick	0.8%	-	-
Newfoundland	-	1.3%	-
Nova Scotia	0.8%	0.7%	0.6%
Nunavut	-	-	0.6%
Ontario	26.1%	18.1%	17.2%
Quebec	0.8%	3.4%	0.6%
Saskatchewan	9.0%	7.4%	7.6%
Yukon	-	-	1.3%

City of Origin	2006	2009	2012
EDMONTON	10.1%	11.4%	14.0%
CALGARY	11.3%	8.7%	9.6%
RED DEER	1.6%	0.7%	3.8%
ST ALBERT	2.3%	4.0%	3.2%
WINNIPEG	6.2%	2.0%	3.2%
ECKVILLE	1.2%	2.0%	2.6%
SPRUCE GROVE	1.6%	3.4%	1.9%
CANMORE	-	1.3%	1.9%
SHERWOOD PARK	2.3%	0.7%	1.9%
BONNYVILLE	0.4%	1.3%	1.3%
LETHBRIDGE	-	1.3%	1.3%
TORONTO	3.5%	1.3%	1.3%
WARBURG	0.4%	1.3%	1.3%
CAMPBELL RIVER	-	0.7%	1.3%
ROCKY MOUNTAIN HOUSE	0.4%	0.7%	1.3%
SUNDRE	-	0.7%	1.3%
COALDALE	-	-	1.3%
ELORA	-	-	1.3%

Alberta visitors consistently increasing as a percentage of repeat lodgers; Ontario and Manitoba decreasing

Markets like Edmonton and Calgary have naturally attracted the most repeat lodgers; Toronto and Winnipeg decreasing

Percentages reflect % of long haul repeat lodge anglers in each year



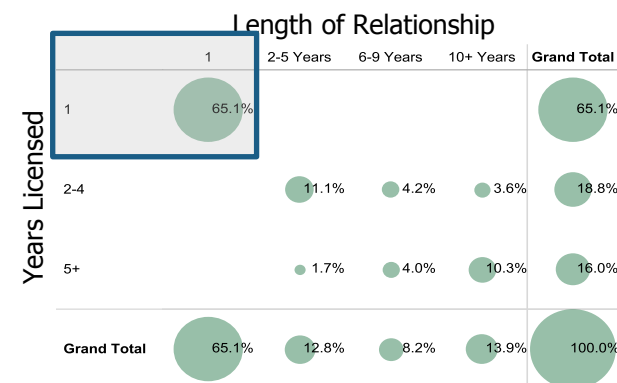
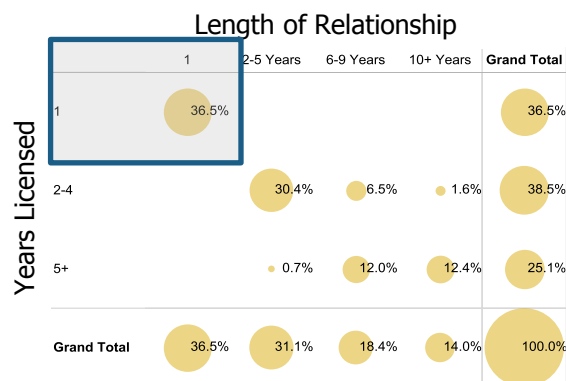
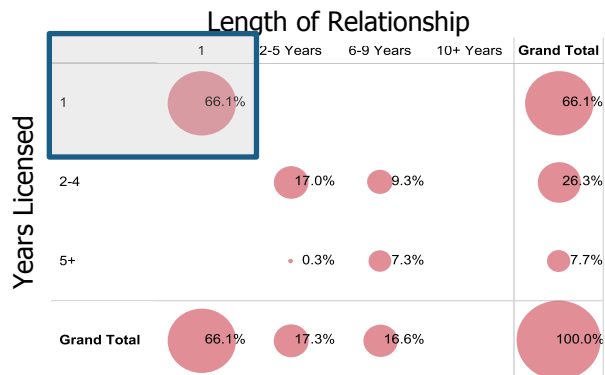
What were lodge anglers like when they came?



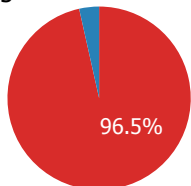
2006

2009

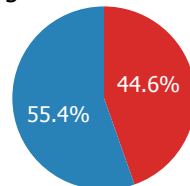
2012



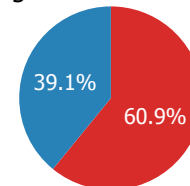
■ Long Haul ■ Short Haul



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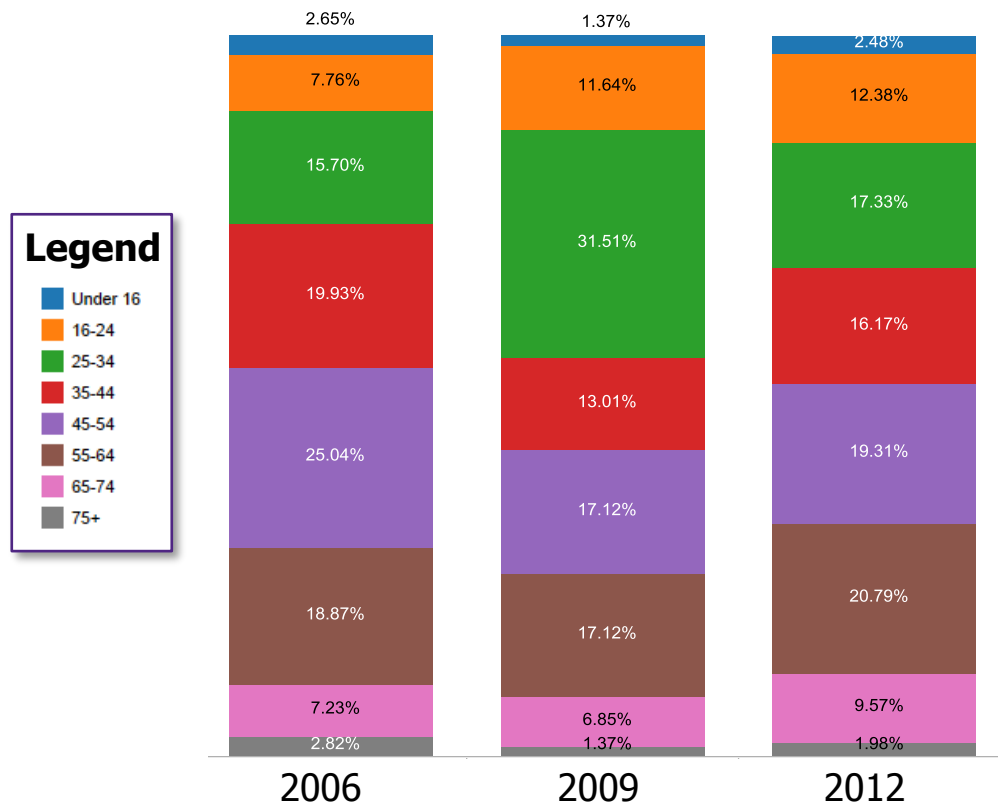
The following analysis will concentrate on the long haul Canadian lodge angler who angled NWT for the first time



Long haul first time lodge anglers: Age & Target Group

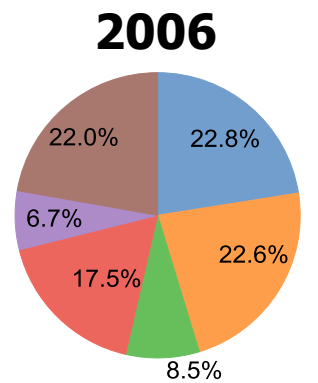


Age Distribution

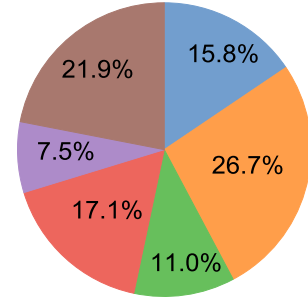


- As a whole, first time lodgers tend to be younger than the repeat lodgers
- Lodgers aged 25-34 much more represented in first time lodge data than repeat lodgers (17% vs 8% in 2012)
- In 2012, those aged 55+ are more represented in repeat lodging than first time lodging analysis (50% vs 32%)

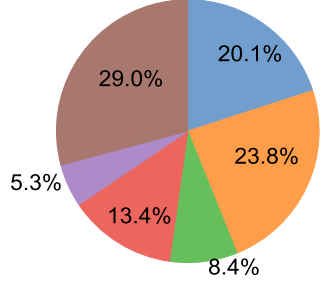
Target Group Distribution



2009



2012



- First time lodge anglers are well distributed among all groups
- Maturing Lodgers are decreasing over time
- Long Haul Money lodged at high rates in 2006 and have rebounded a bit in 2012 after a slower 2009
- Sportsmen have stayed strong across all years



Long haul first time lodge anglers: Markets



Province	2006	2009	2012
Alberta	32.5%	48.0%	40.1%
British Columbia	9.4%	9.6%	11.4%
Manitoba	10.4%	6.9%	5.3%
New Brunswick	-	0.7%	2.2%
Newfoundland	0.5%	1.4%	0.2%
Nova Scotia	0.7%	4.1%	1.7%
Nunavut	0.4%	-	-
Ontario	31.3%	16.4%	29.0%
Prince Edward Island	-	-	0.3%
Quebec	1.9%	6.9%	4.6%
Saskatchewan	12.9%	4.8%	5.0%
Yukon	-	1.4%	0.3%

City of Origin	2006	2009	2012
EDMONTON	6.7%	11.6%	10.2%
CALGARY	6.5%	9.6%	7.9%
TORONTO	2.8%	3.4%	3.6%
SHERWOOD PARK	1.1%	3.4%	3.0%
WINNIPEG	5.1%	3.4%	2.6%
SASKATOON	4.1%	1.4%	1.8%
VANCOUVER	1.1%	1.4%	1.7%
AIRDRIE	0.2%	0.7%	1.5%
LONDON	0.4%	-	1.5%
RED DEER	0.4%	2.7%	1.2%
OTTAWA	-	-	1.2%
REGINA	1.8%	-	1.2%
WATERLOO	0.2%	-	1.2%
WHITECOURT	0.2%	-	1.2%
OAKVILLE	0.7%	-	1.0%
EDSON	-	1.4%	0.8%
MISSISSAUGA	1.9%	1.4%	0.8%
KELOWNA	1.6%	0.7%	0.8%

- Cities within the province of Alberta have attracted the most first time anglers to lodges
- First time lodge anglers are less represent in Alberta than the repeat lodgers; Ontario and BC have attracted first timers at steady rates

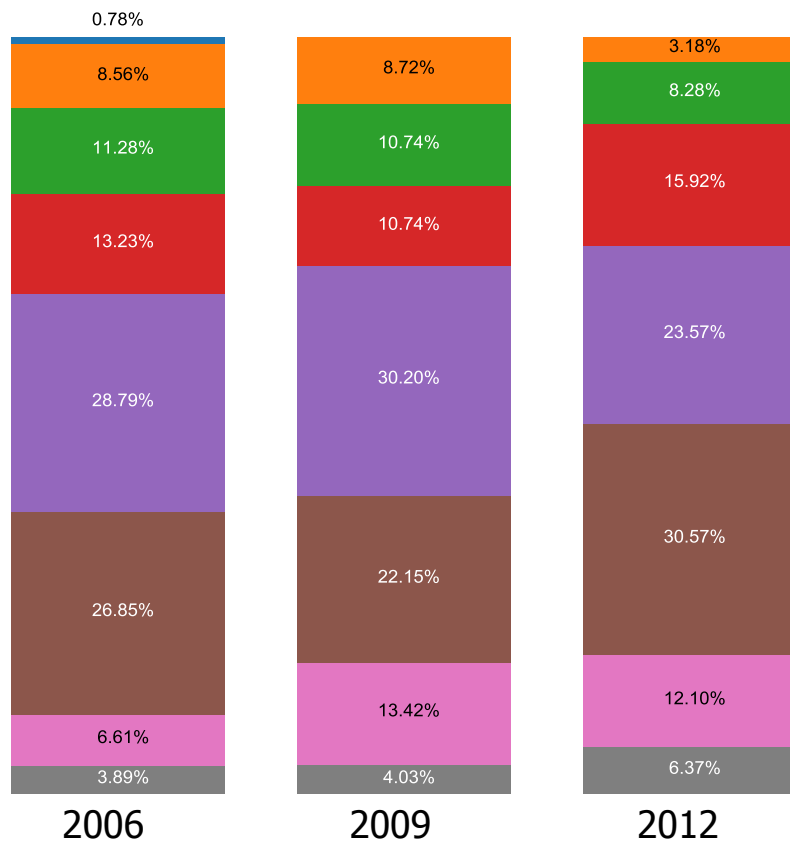
Comparing Canadian Long Haul Lodgers



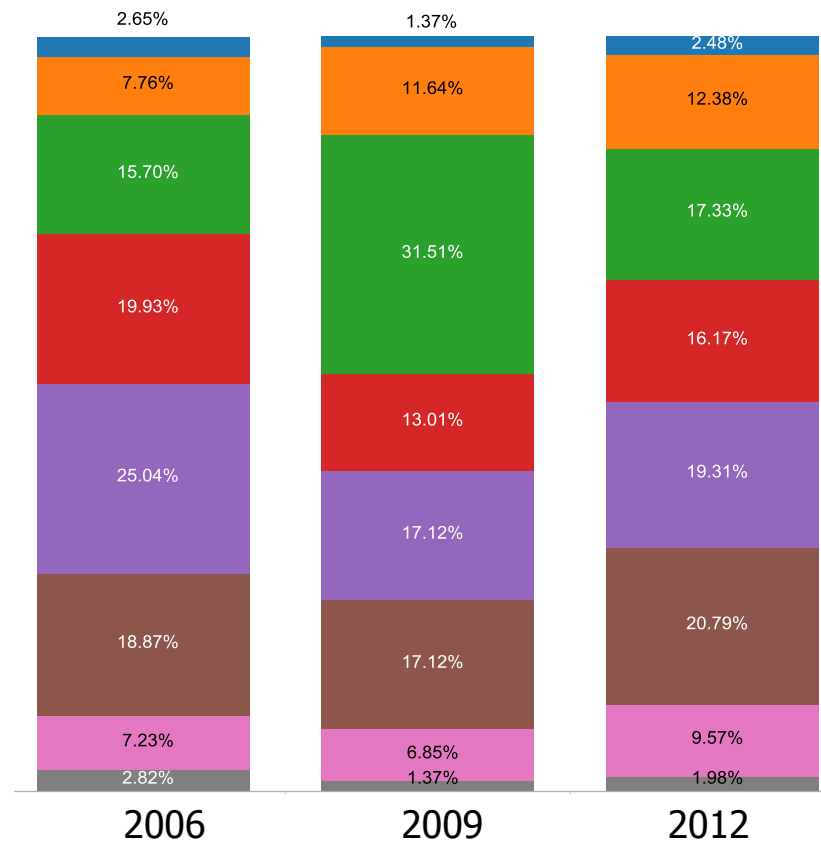
Repeat Lodgers Older than First Timers



Repeat Lodgers



First Time Lodgers



- 49% of 2012 repeat lodgers are 55+ -- an increase of 31% over 2006
- First Time lodgers include a sizeable contingent of younger anglers, age 16-24 or 25-34. Consistency across the years suggests a different kind of traveler, not necessarily in the "repeat" mindset
- Perhaps some multi-generational trips happening (coming once with Grandpa)

Legend

- Under 16
- 16-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65-74
- 75+



Repeat Lodgers: More Affluent

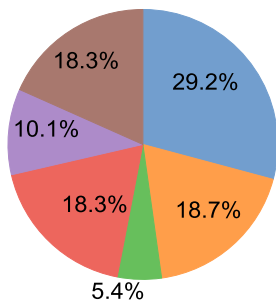


Legend

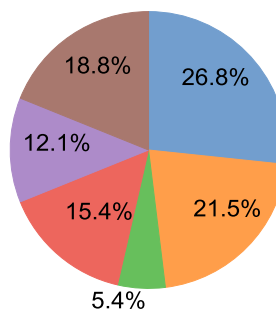
- Long Haul Money
- Sportsmen
- Younger Explorers
- Maturing Lodgers
- Road Trippers
- Non-Target

Repeat Lodgers

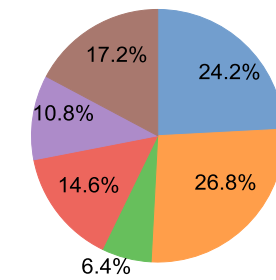
2006



2009

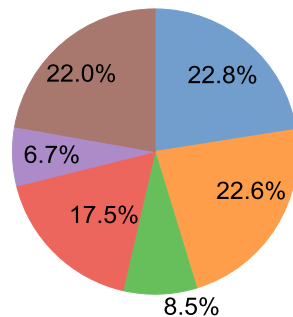


2012

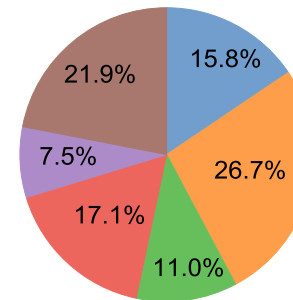


First Time Lodgers

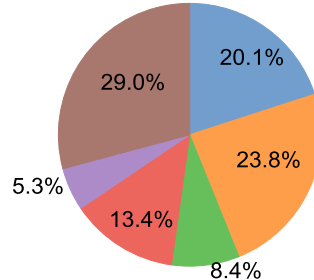
2006



2009



2012



- Long Haul Money captures about a quarter of repeat long haul lodgers in each year, but a smaller percent of first timers
- Sportsmen are increasing as a percent of repeat lodgers, and holding steady as first time lodgers
- Younger Explorers are more significant within first-time lodgers than repeats, suggesting they may not be coming back

Repeat Lodgers

Province	2006	2009	2012
Alberta	42.8%	58.4%	61.2%
British Columbia	8.2%	5.4%	7.6%
Manitoba	11.7%	5.4%	3.2%
New Brunswick	0.8%	-	-
Newfoundland	-	1.3%	-
Nova Scotia	0.8%	0.7%	0.6%
Nunavut	-	-	0.6%
Ontario	26.1%	18.1%	17.2%
Quebec	0.8%	3.4%	0.6%
Saskatchewan	9.0%	7.4%	7.6%
Yukon	-	-	1.3%

First Time Lodgers

Province	2006	2009	2012
Alberta	32.5%	48.0%	40.1%
British Columbia	9.4%	9.6%	11.4%
Manitoba	10.4%	6.9%	5.3%
New Brunswick	-	0.7%	2.2%
Newfoundland	0.5%	1.4%	0.2%
Nova Scotia	0.7%	4.1%	1.7%
Nunavut	0.4%	-	-
Ontario	31.3%	16.4%	29.0%
Prince Edward Island	-	-	0.3%
Quebec	1.9%	6.9%	4.6%
Saskatchewan	12.9%	4.8%	5.0%
Yukon	-	1.4%	0.3%

- Canada's repeat lodgers are increasingly likely to hail from Alberta
- Ontario and Manitoba have seen a significant decline as a proportion of all long-haul repeat lodgers
- Ontario has maintained its share of first-time lodgers since 2006, having recovered from a dip in 2009
- MB and SK combined still greater than BC



Canadian Anglers and Lodgers: Summary

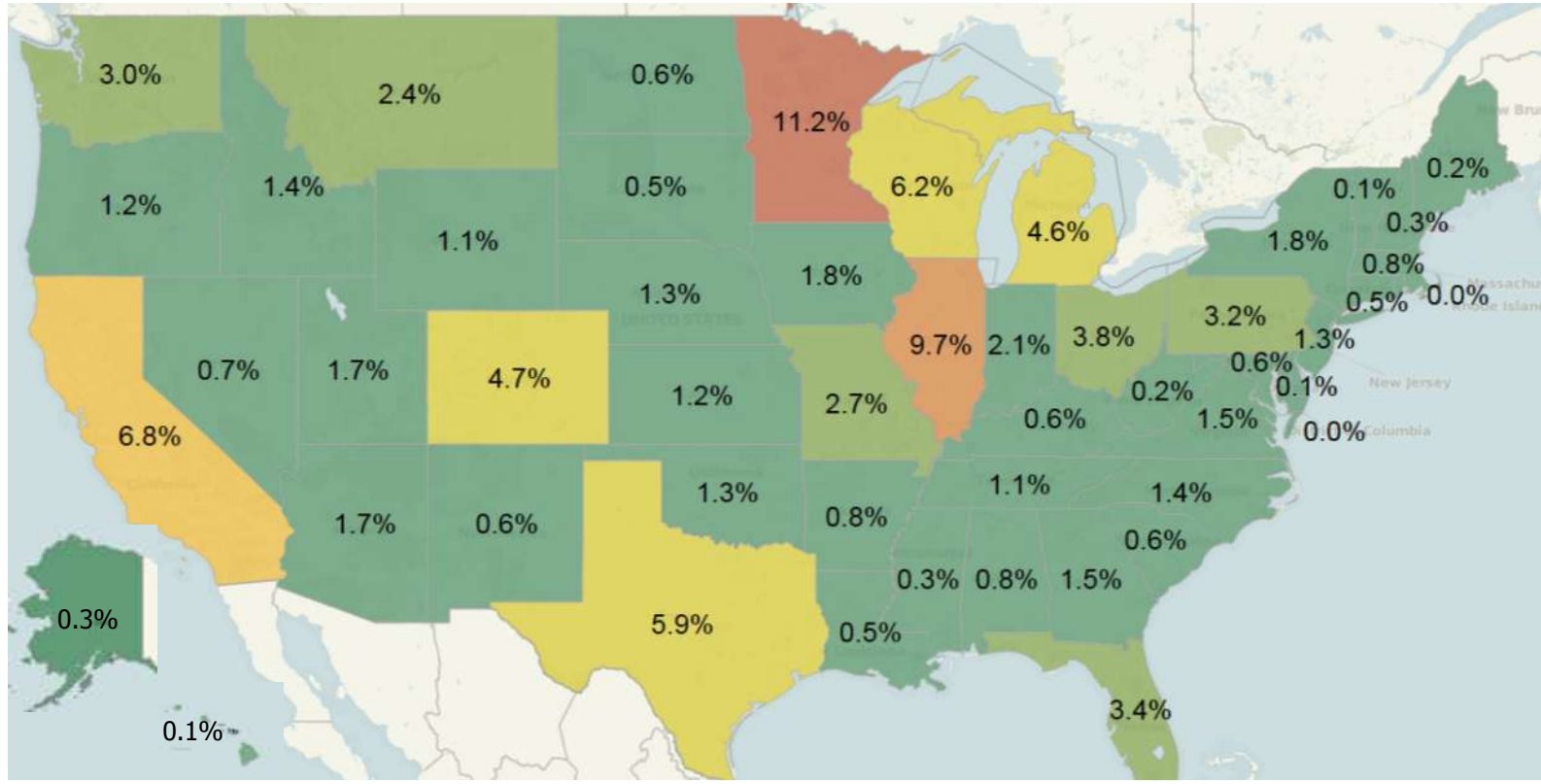


- Canada's non-resident anglers have shown consistent numbers since the mid 2000s
- They have lodged at high and low numbers and rates suggestive of a 2 year "boom and bust" cycle, with even years strong
- About two-thirds of lodgers in 2006 and 2012 were repeat visitors; this figure dropped to one-third in 2009 but bounced back
- Repeat lodgers tend to be older, more affluent and more likely from Alberta than first-timers
- Key "bread and butter" long haul Angling segments include Long Haul Money and Sportsmen; new opportunities may involve Younger Explorers for long haul, or Road Tripper families in short haul markets

The Lay of the Land American Anglers



All US states and DC represented among US anglers



Regions have been created for further streamlined analysis

Region	Percentage
West	24.7%
Midwest	48.7%
South	17.8%
Northeast	8.8%

Top States

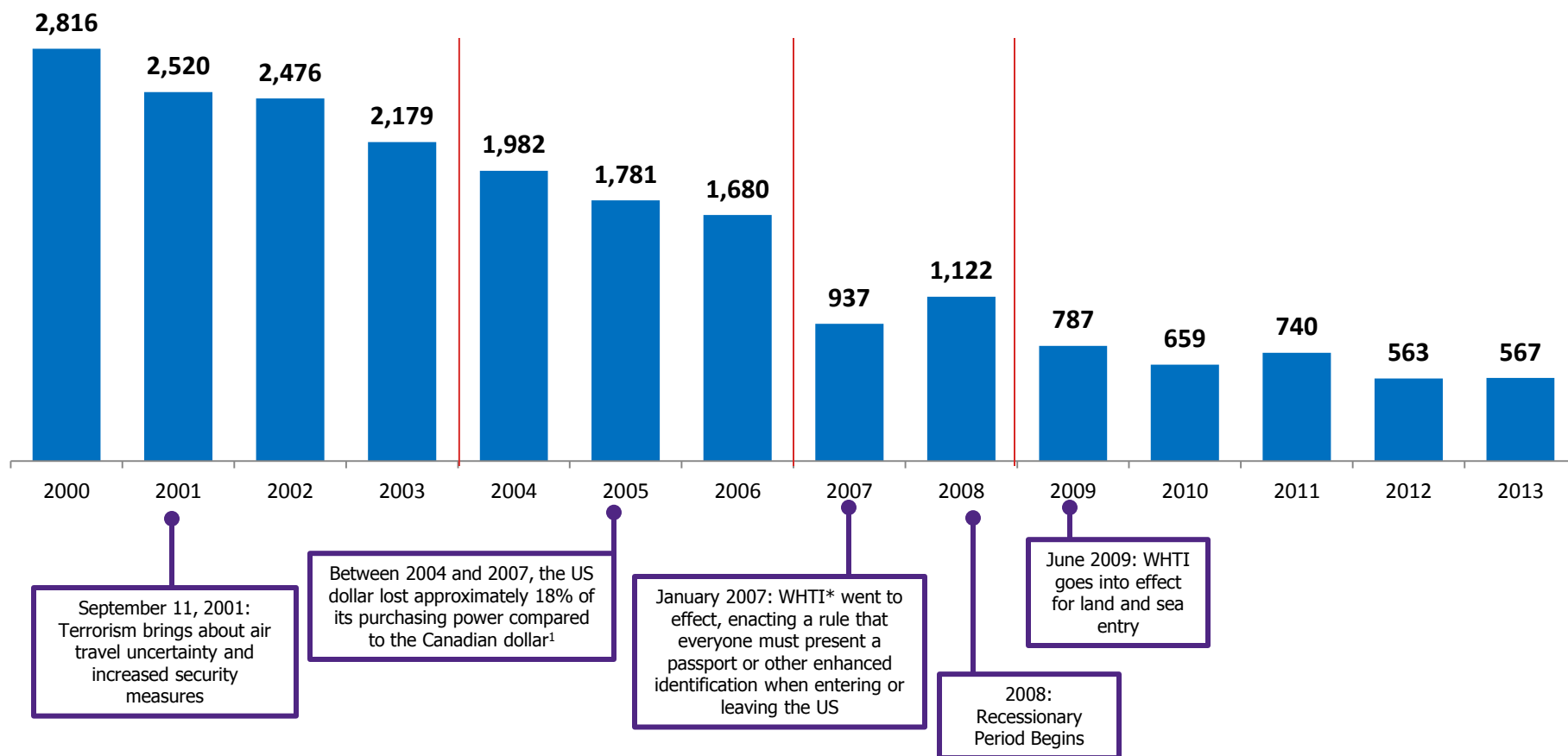
- Minnesota – 11.2%
- Illinois – 9.7%
- California - 6.8%
- Wisconsin - 6.2%
- Texas - 5.9%



American Anglers Over Time



American anglers to NWT have declined steadily since 2000, with a flattening since 2008



Possible Barriers to Entry



Anglers Over Time – By Region



Legend

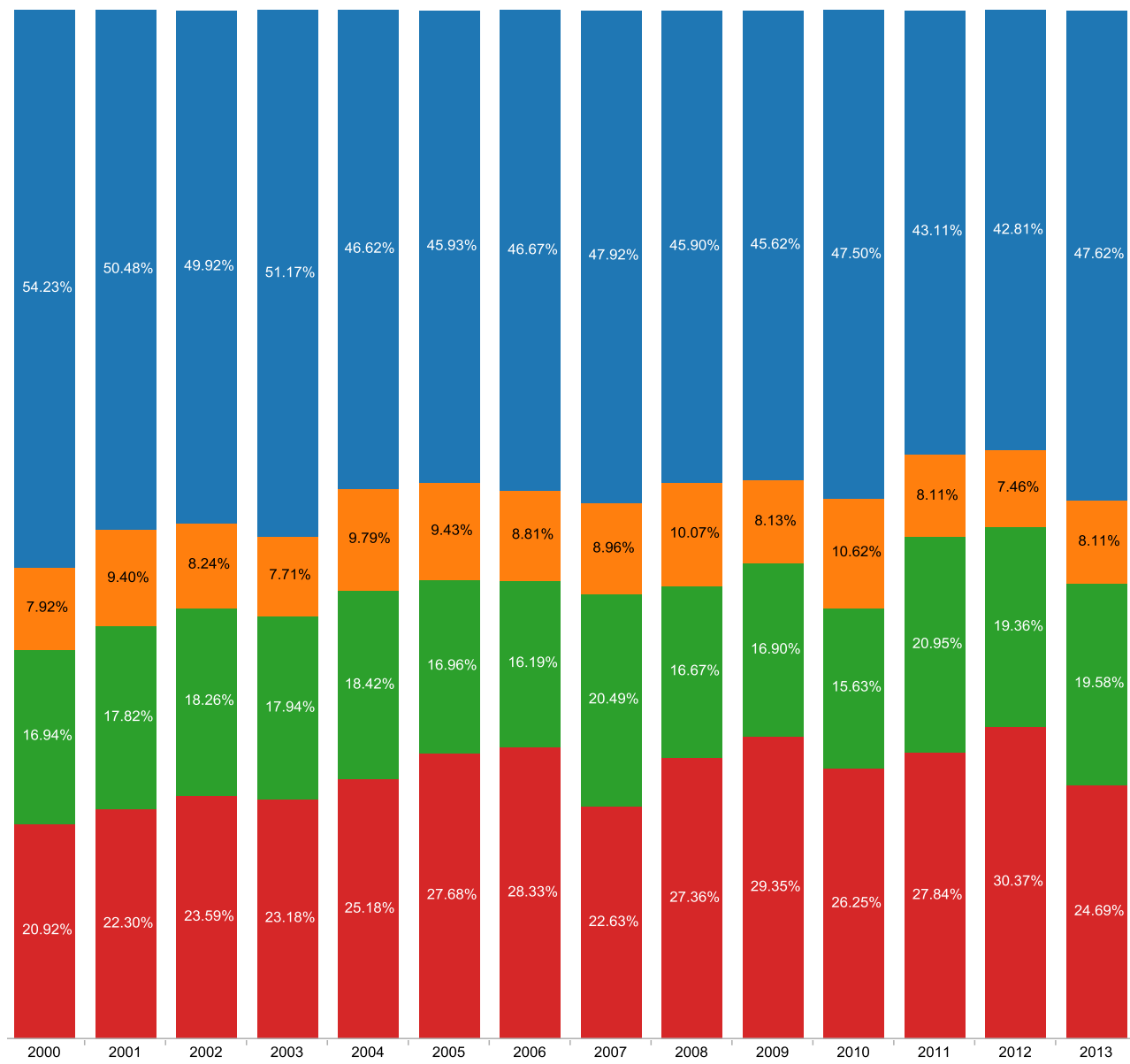
State (group)

- Midwest
- Northeast
- South
- West



The 4 Regions, as a percentage of total anglers, have remained steady over time

Midwest still sends the most anglers to NWT with nearly 50% of all American licensees

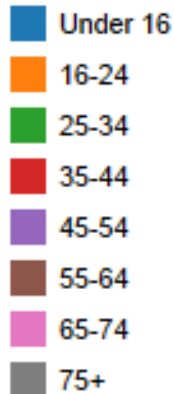




Anglers Over Time – By Age

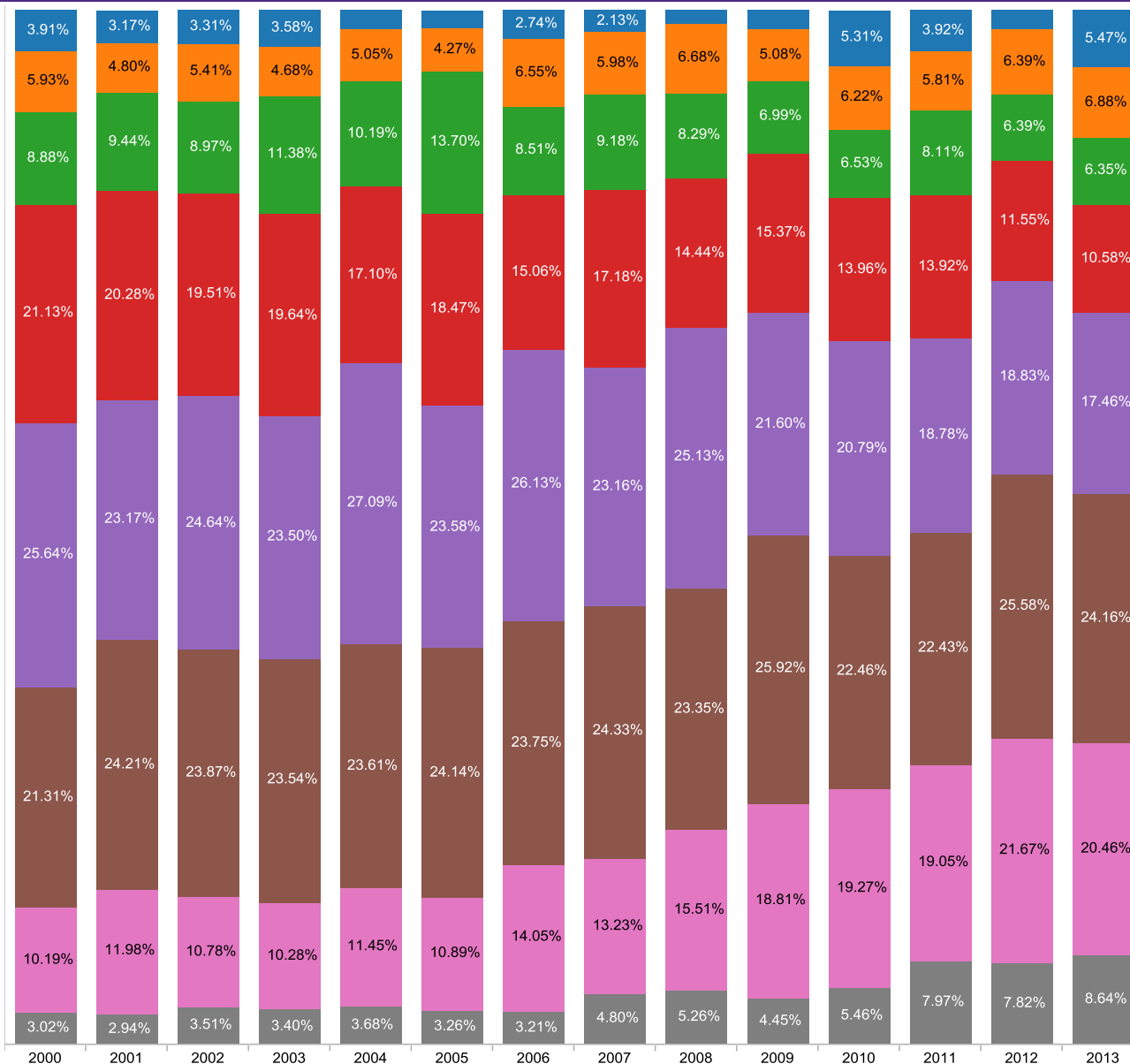


Legend



American anglers to NWT have aged even more rapidly than their Canadian counterparts

The proportion of anglers 65+ has tripled since 2000, but it should be noted this is a bigger piece of a much smaller pie





Meet The American Angling Target Segments



Privileged Empty Nesters

- Prominent matures living in suburban and bedroom communities around major cities; many with adult age children, they may have the time and nest egg to enjoy a more grand lifestyle
- Though not 'outdoorsy' as others, overall they have angled in NWT at higher rates, but their numbers, like most American anglers, have dwindled over the years



Upper-middle Class Adventures

- These active middle-aged suburbanites are on the fast track to living very prosperous lives; they also have a propensity to get outside to fish and camp when they can fit it in their busy schedules
- Angling NWT at high rates and have a tendency to visit on multiple occasions, they make up a smaller percentage of anglers than Privileged Empty Nesters and may not have angled as often recently either



Salt-of-the-Earth

- As the name suggests, these middle-age households are some of the most likely to be interested in fishing, hunting and the like. They often live in small towns throughout the country and live a more middle-class lifestyle
- Possibly hurt more drastically by legislation and buying power they have dropped off significantly since the early 2000s, and even though most Americans do use lodges they may be comfortable using other means of accommodation during their fishing vacation



Suburban Sprawl

- A mix of younger families and professional couples without children these suburban households live very active work and leisure lifestyles
- This is a group that has angled at average rates over the years but as millennials have arrived into this lifestage they may be looking for new vacation adventures. Many exhibit interest in outdoor activities but possibly different experiences than those enjoyed by other US Angler groups.



Privileged Empty Nesters

- Prominent matures living in suburban and bedroom communities around major cities; many with adult age children, they may have the time and nest egg to enjoy a more grand lifestyle
- Though not 'outdoorsy' as others, overall they have angled in NWT at higher rates, but their numbers, like most American anglers, have dwindled over the years

Cosmopolitan Elite

- College-educated professionals, older, upper-class, empty-nesting couples.
- Leading citizens of their small-town communities.
- Enjoy the trappings of success.

Upper Crust

- The nation's most exclusive address, the wealthiest lifestyle in America--a haven for empty-nesting couples between the ages of 45 and 64.
- No segment has a higher concentration of residents earning over \$100,000 a year and possessing a postgraduate degree. And none has a more opulent standard of living.



Upper Middle Class Adventurers

- These active middle-aged suburbanites are on the fast track to living very prosperous lives; they have a propensity to get outside to fish and camp when they can fit it in their busy schedules.
- Angling NWT at high rates and have a tendency to visit on multiple occasions, they make up a smaller percentage of anglers than Privileged Empty Nesters and may not have angled as often recently either.

God's Country

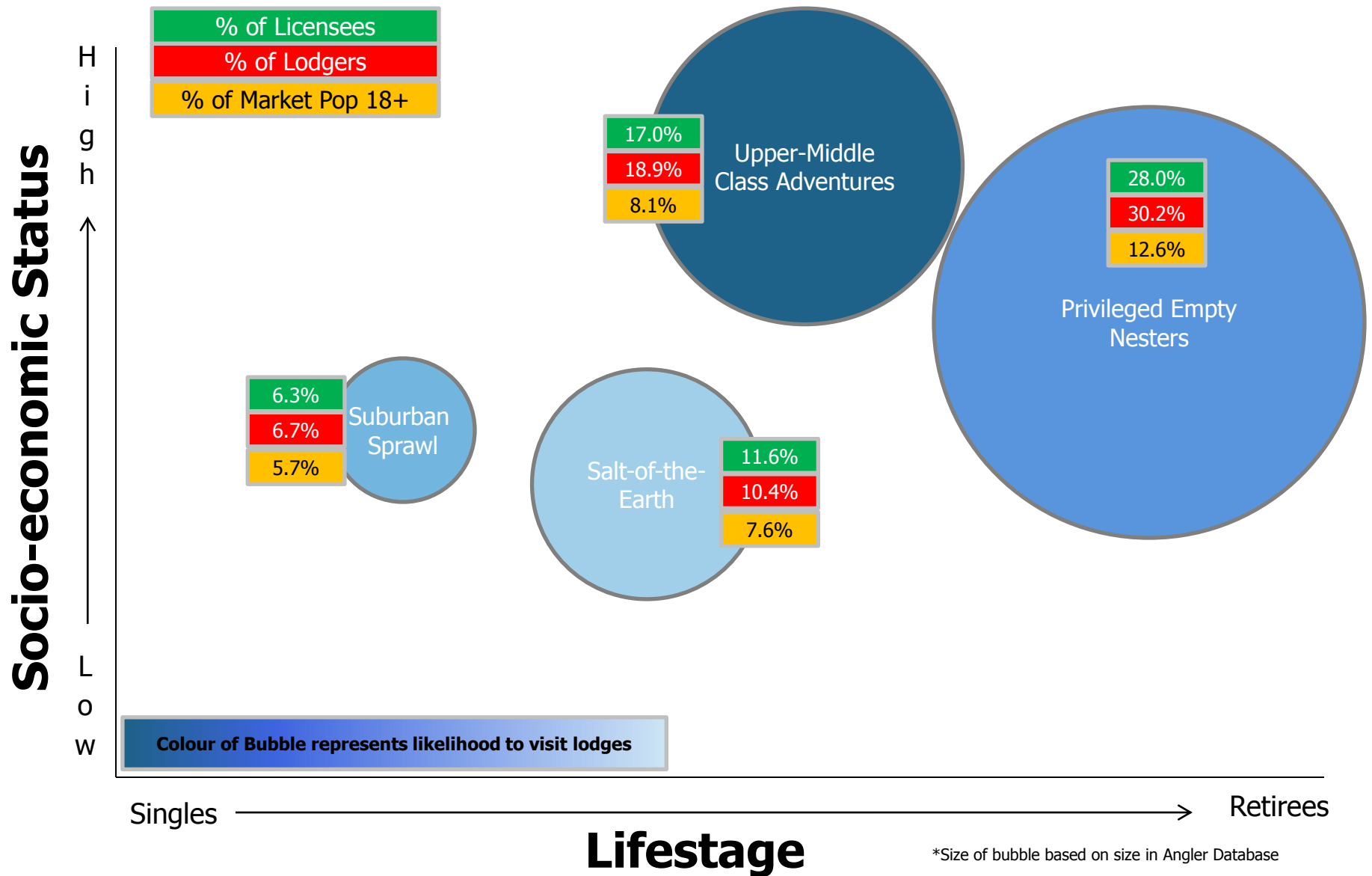
- City dwellers and suburbanites who began moving to the country in the 1970s, emerged as the most affluent of the nation's exurban lifestyles.
- Typically college educated Baby Boomers they try to maintain a balanced lifestyle between high power jobs and laid back leisure.

Country Squires

- The wealthiest residents in exurban America, affluent Baby Boomers who've fled the city for the charms of small-town living.
- Enjoy country club sports like golf, tennis, and swimming as well as skiing, boating, and biking.



American target groups represent 63% of all anglers



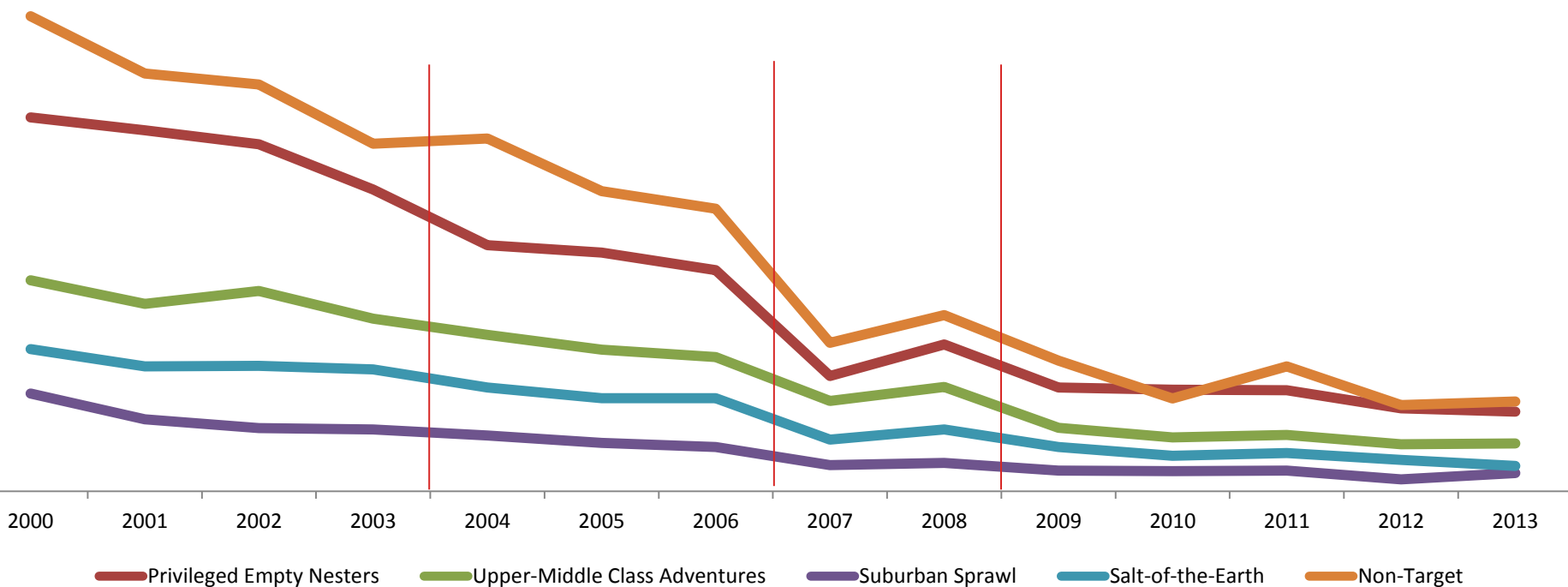
*Size of bubble based on size in Angler Database



Decreased visitation across all four US target groups



The steady decline is shared by all target groups with Privileged Empty Nesters declining at the highest rates



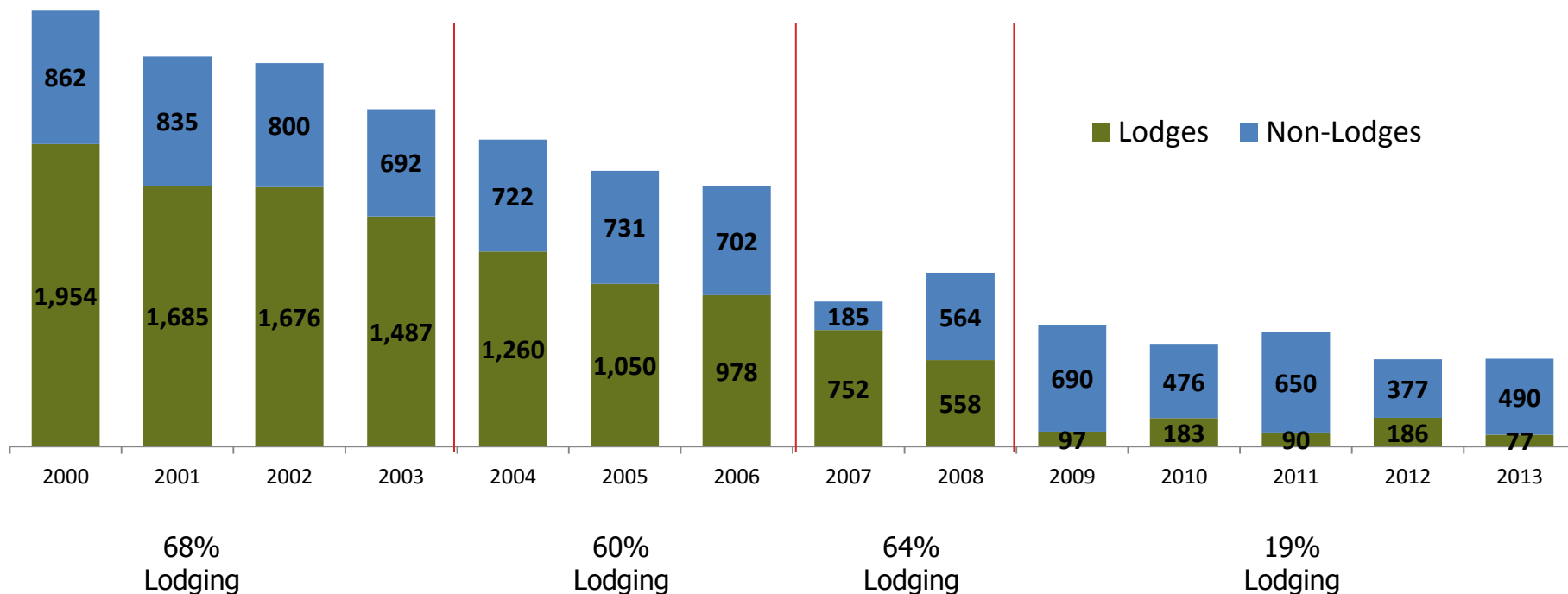
American Lodgers



American Anglers Over Time



From 2009 onward, the percentage of American Anglers staying at lodges has decreased dramatically



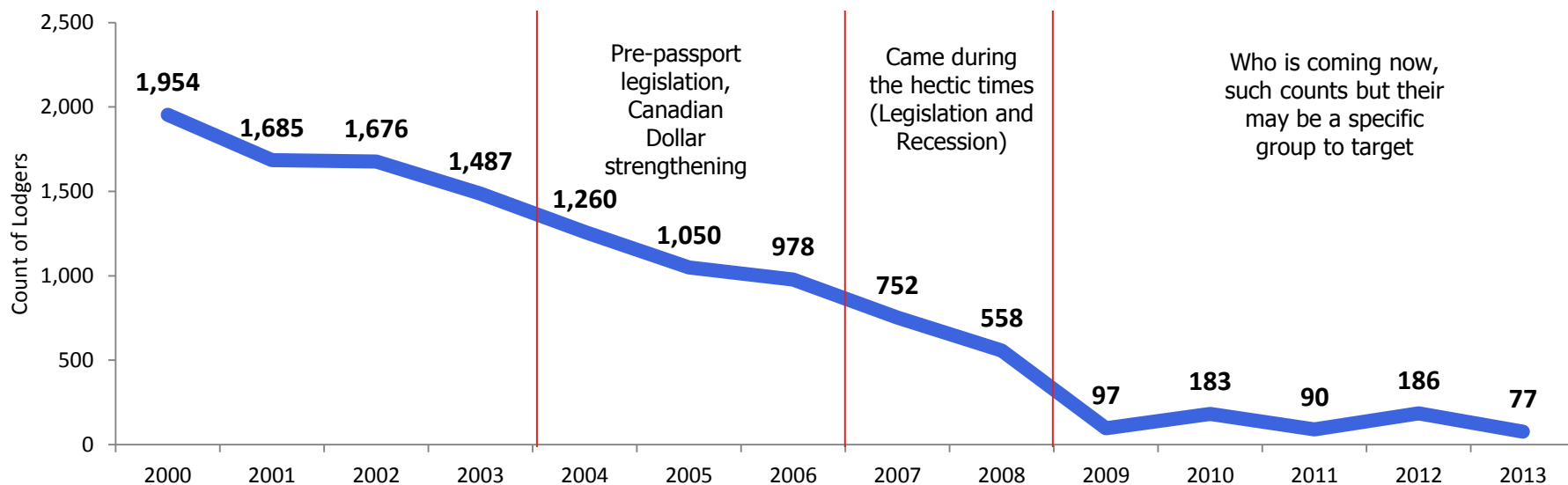
We will take a deeper dive into three time periods to best understand who has come, who has come back and who has come recently



American US lodge anglers



Like overall anglers, Americans are coming in fewer numbers over time. However, like Canadian lodgers there seems to be a slight even-year trend since 2009





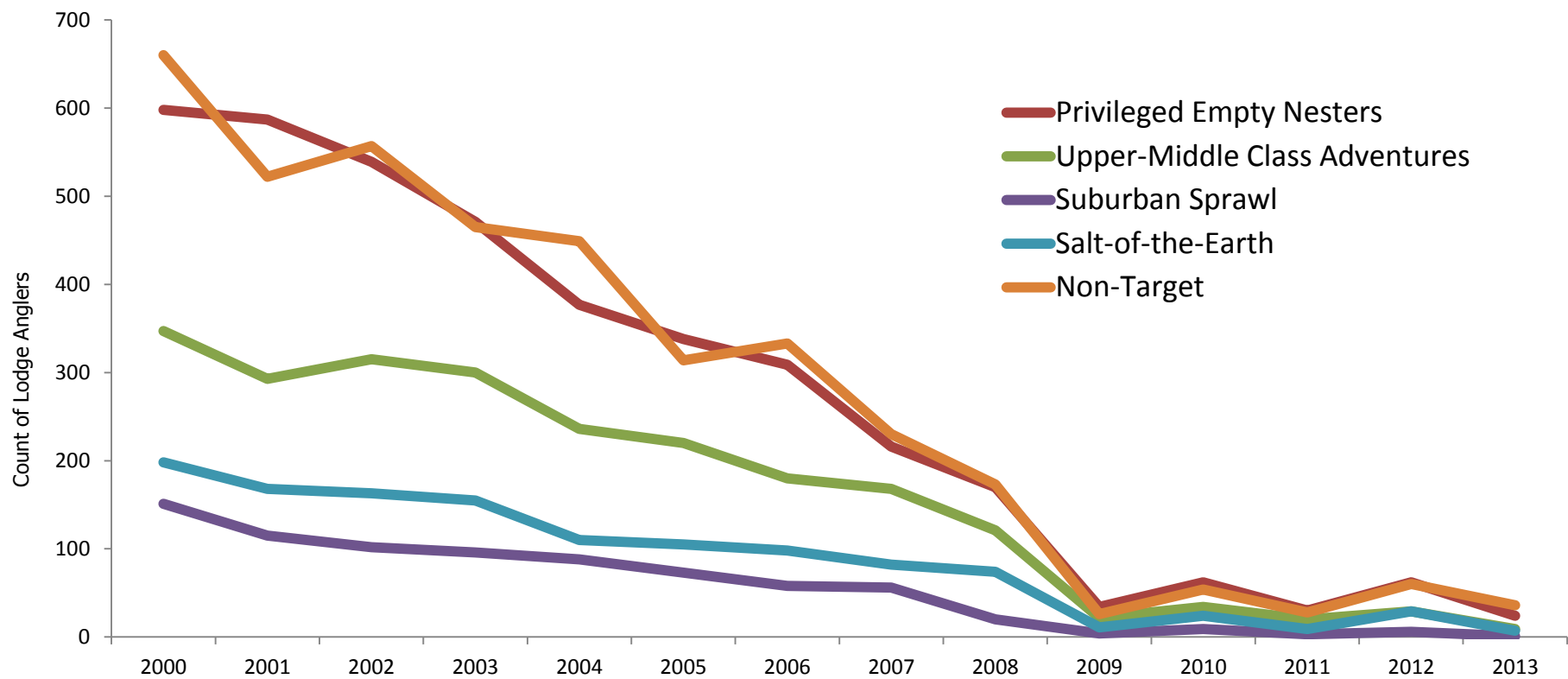
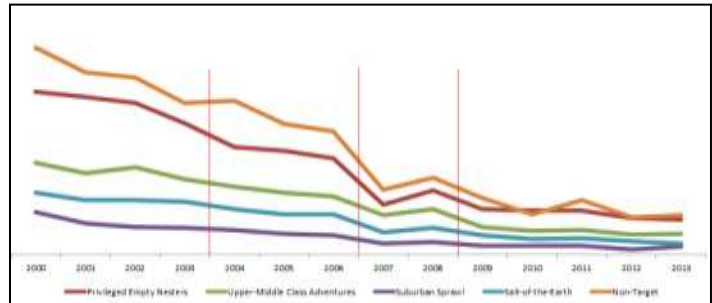
US lodge angler trend follows the US angler decline



The trend identified among all American anglers to NWT, is also occurring amongst lodge anglers across all target groups

Privileged Empty nesters show strongest decline but are among the most likely to still lodge today

All Anglers by Target Group

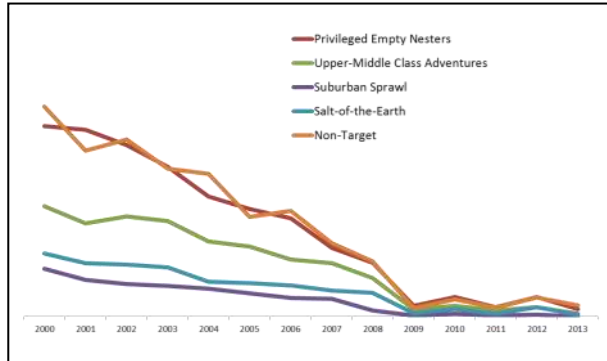




Lodging rates decline among remaining US anglers



Lodge Anglers

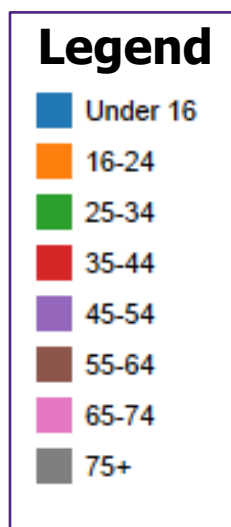


In recent years individuals have not only come at lower rates but they are lodging less often when they come. This is evident among all target groups

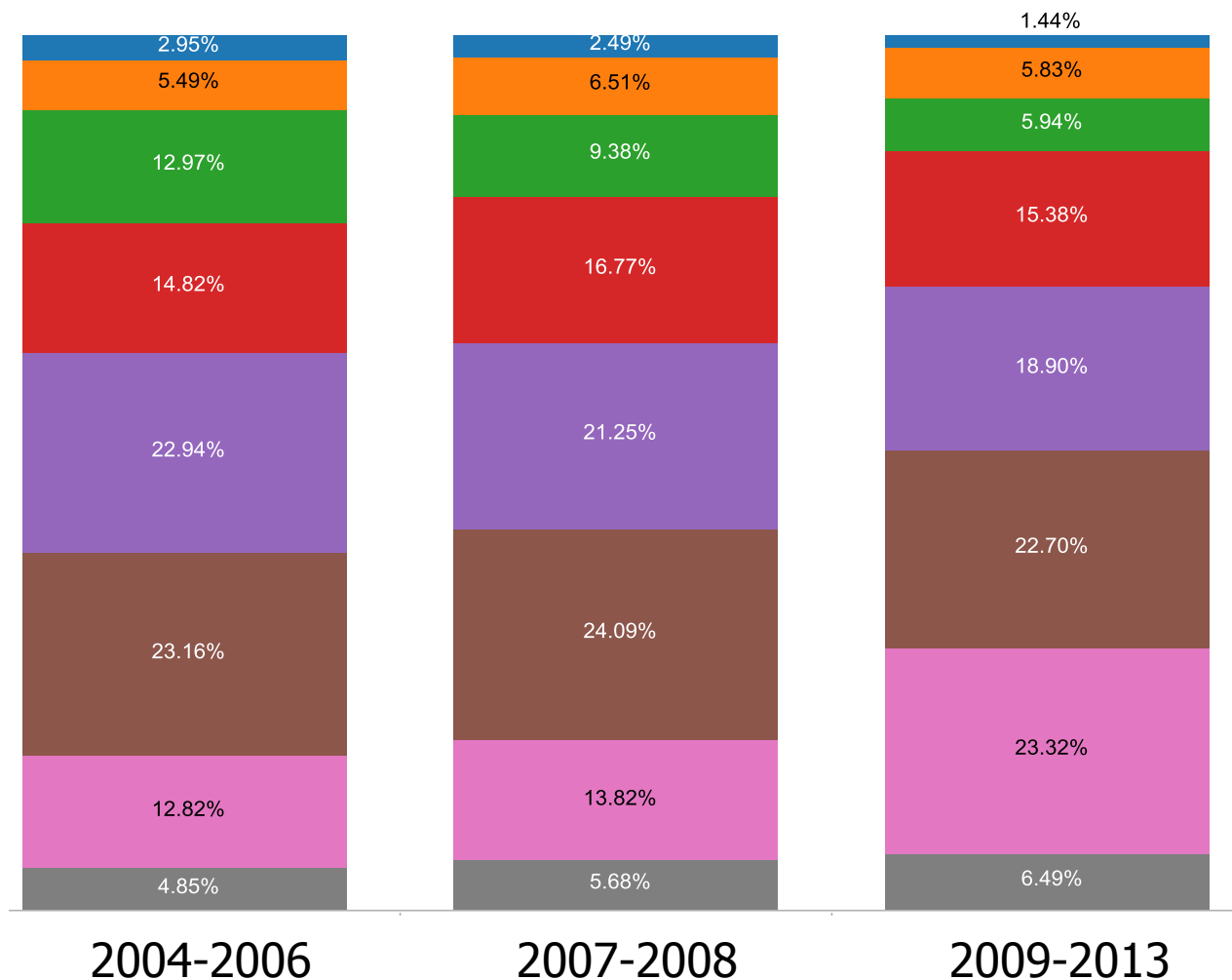
	<div><div>% of Anglers</div><div>% of Anglers who lodged</div></div>				
	Privileged Empty Nesters	Upper Middle Class Adventures	Suburban Sprawl	Salt-of-the Earth	Non-Target
2004-2006	28.1% 67.0%	17.2% 67.9%	5.9% 68.0%	11.6% 49.8%	37.2% 54.1%
2007-2008	27.6% 68.0%	20.5% 68.5%	5.8% 63.9%	12.0% 63.4%	34.2% 57.2%
2009-2013	30.7% 20.8%	17.6% 19.6%	6.0% 11.5%	11.4% 21.1%	34.3% 17.9%



Lodge Anglers Over Time – By Age



As with US anglers overall, US lodge anglers are getting older: 53% aged 55+ in recent years compared to 41% from 2004-2006





What were lodge anglers like when they came?



2004-2006

3,288 Lodge Anglers

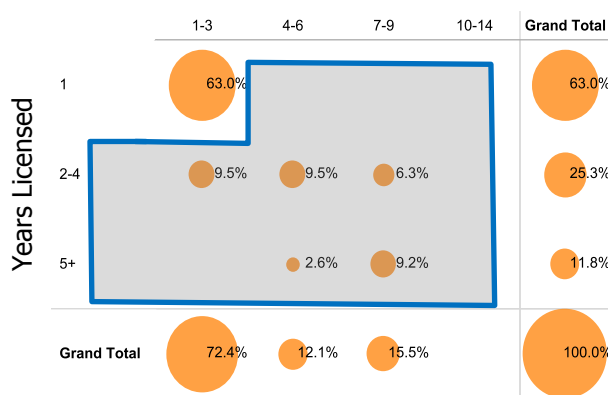
Length of Relationship



2007-2008

1,310 Lodge Anglers

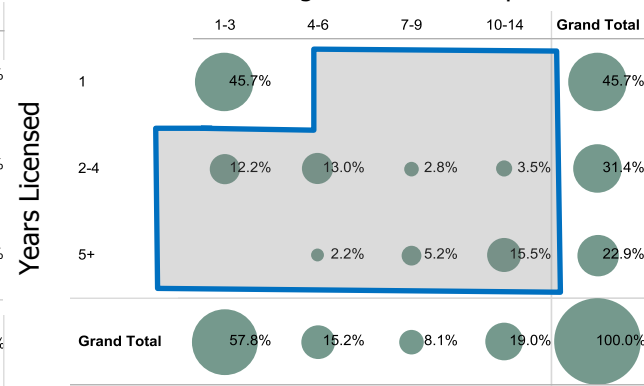
Length of Relationship



2009-2013

633 Lodge Anglers

Length of Relationship



- Before 2009 about two-thirds of American lodge anglers were first time anglers in the NWT
- Since 2009, a over 50% have previously purchased a NWT fishing license

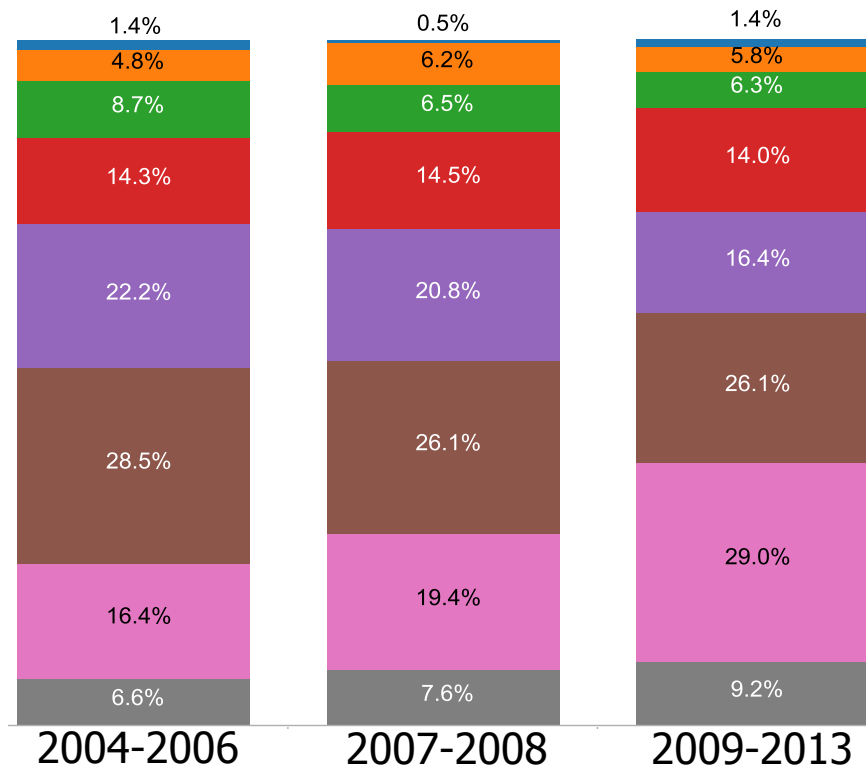
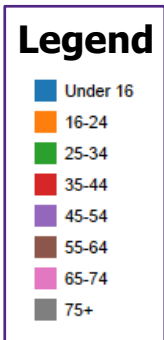
The following analysis will concentrate on repeat American lodge anglers



Repeat American lodge anglers: Age & Target Group



Age Distribution

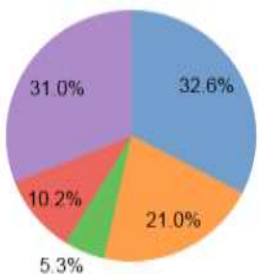


- Repeat lodgers have aged considerably. From 2009 to 2012 about 64% were over 55 years of age
- The proportion of repeat lodge anglers under 35 has consistently been very small

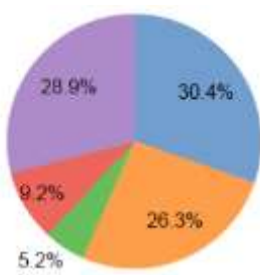
Target Group Distribution



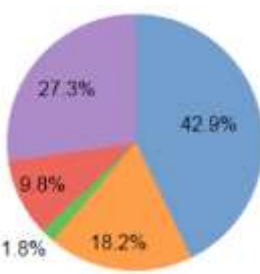
2004-2006



2007-2008



2009-2013



- Repeat lodge anglers are most commonly found in the Upper-middle Class Adventures and Privileged Empty Nesters groups
- The share of Privileged Empty Nesters has increased significantly in recent years



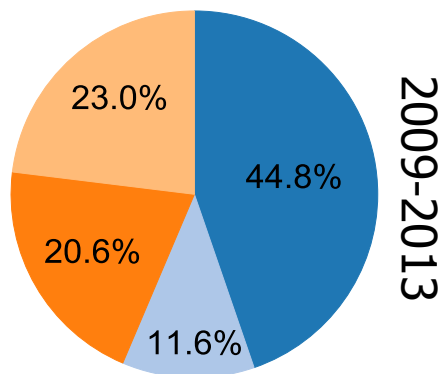
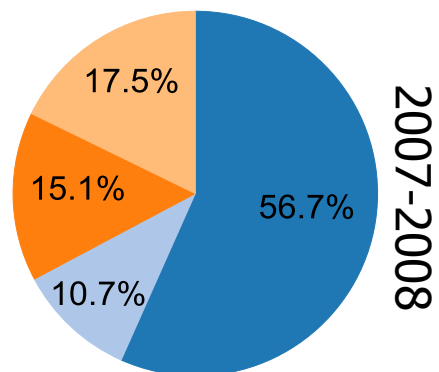
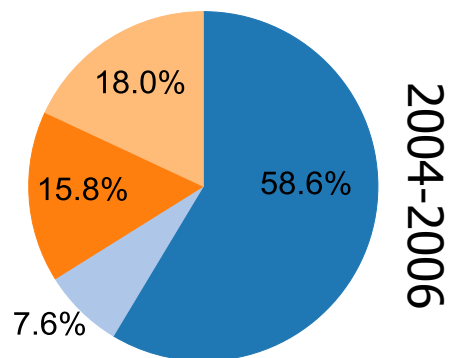
Repeat American lodge anglers: Markets and Lodges



Legend



- Midwesterners represent the bulk of repeat lodge anglers, however the percentage of repeat lodgers from the Midwest has dropped
- The percentage of repeat lodge anglers from the South and Western States has increased



Percentages reflect % of American repeat lodge anglers in each time period



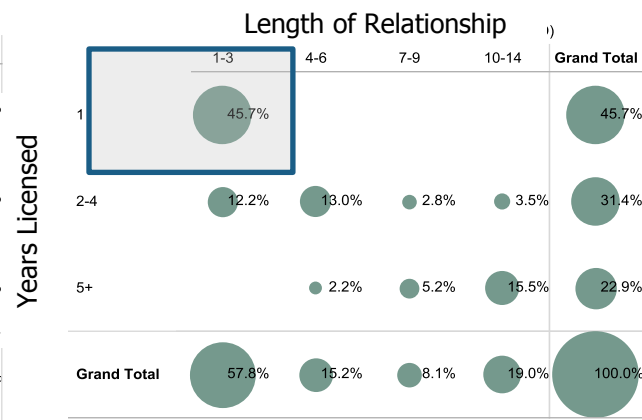
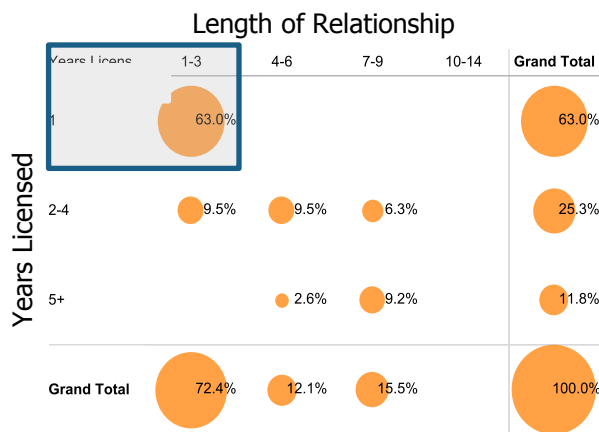
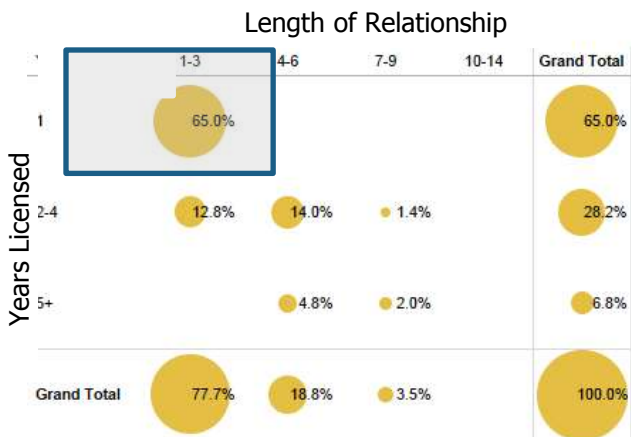
Lodge Anglers



2004-2006

2007-2008

2009-2013



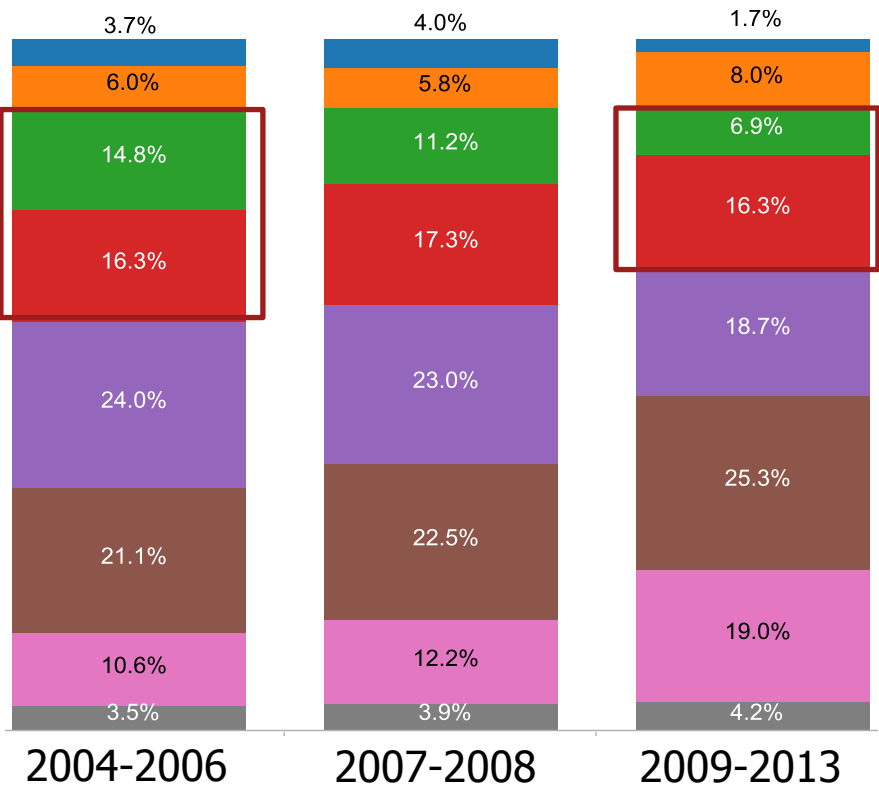
The following analysis will concentrate on first time American lodge anglers



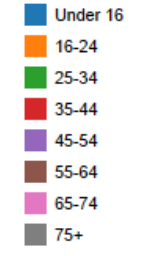
First time lodge anglers: Age & Target Groups



Age Distribution



Legend



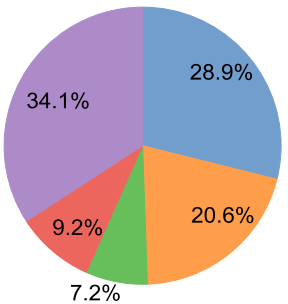
American first time lodgers have also aged over the years, but are younger than repeat lodgers overall

Target Group Distribution

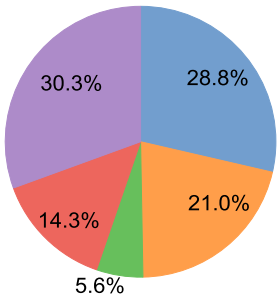


- Moderate shifts in target group composition of first time lodge anglers
- As a percentage of first time lodge anglers, Salt-of-the-Earth has increased while Privileged Empty Nesters has remained stable
- Suburban Sprawl has seen declines but through the years has been the smallest of the four target groups

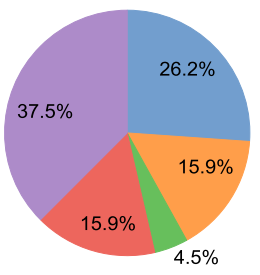
2004-2006



2007-2008



2009-2013



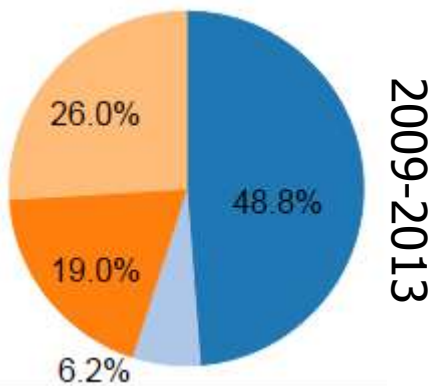
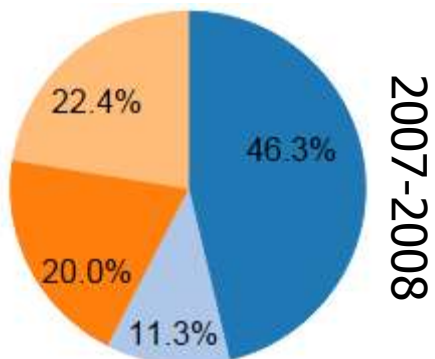
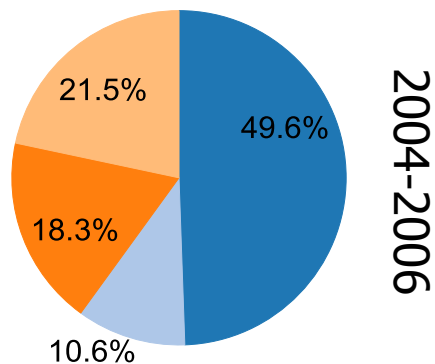


First time lodge anglers: Geographic Markets



Legend

- Midwest
- Northeast
- South
- West



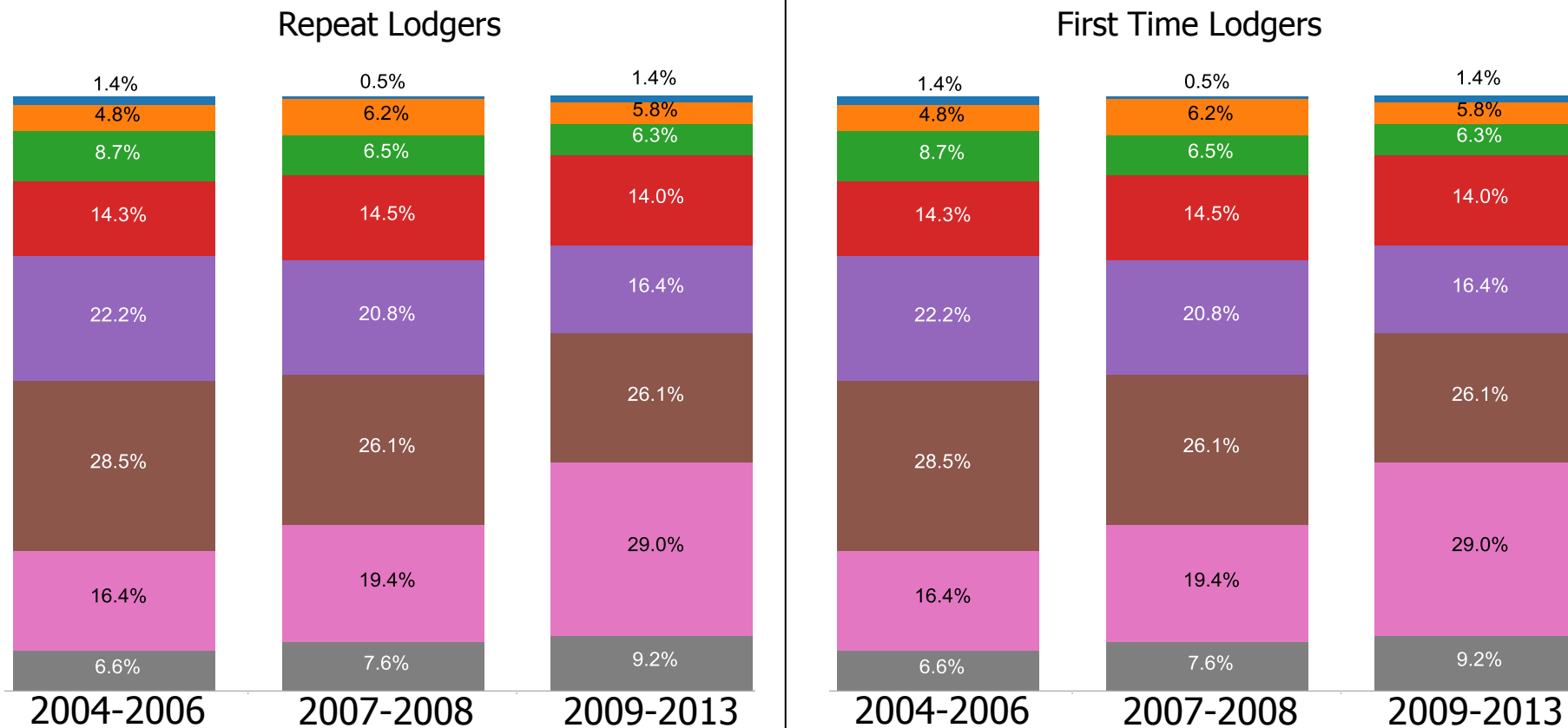
- Midwesterners represent a steady half of new lodge anglers over the 3 time periods
- The share of first time lodge anglers in the West has increased while the Northeast has declined

Percentages reflect % of American first time lodge anglers in each time period

Comparing US Lodgers

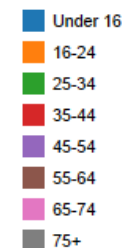


Repeat and First Time Lodgers Aging



- US lodgers getting older: 55+ is a larger share of a smaller pie in each group of years, for new and repeat lodgers
- US Lodgers under 34 represent a smaller and smaller proportion of new or repeat lodgers

Legend





Privileged Empty Nesters: A Bigger Slice of a Smaller US Pie

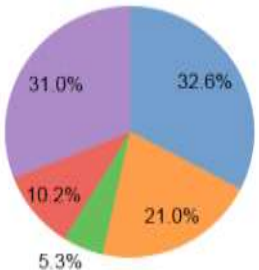


Legend

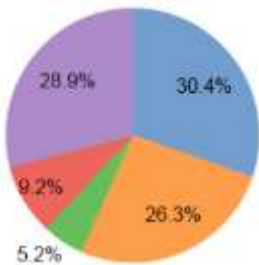
- Privileged Empty Nesters
- Upper-Middle Class Adventures
- Suburban Sprawl
- Salt-of-the-Earth
- Non-Target

Repeat Lodgers

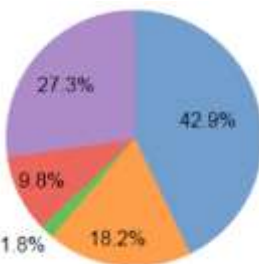
2004-2006



2007-2008

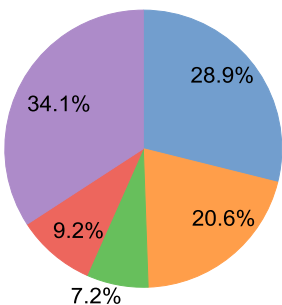


2009-2013

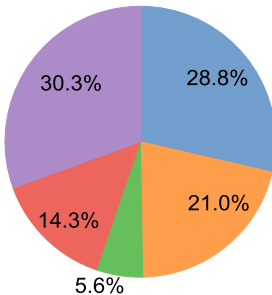


First Time Lodgers

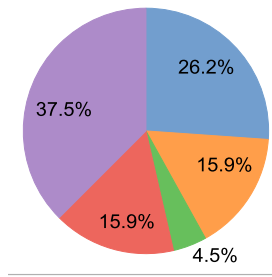
2004-2006



2007-2008



2009-2013



- Privileged empty nesters represent an increasing share of repeat lodgers and a consistent share of first-timers
- Upper-Middle Class Adventurers and Suburban Sprawl are fast declining as a share of repeat and first time lodgers
- Salt-of-the-Earth lodgers have increased as first time lodgers but do not show parallels in repeat activity

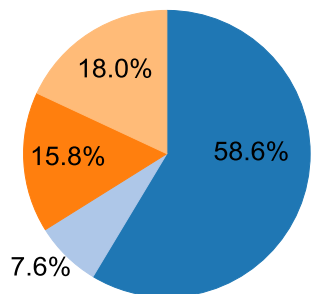


Repeat Lodgers: Midwest Holding Its Own?

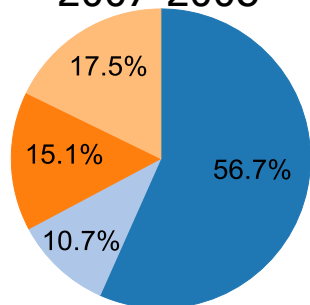


Repeat Lodgers

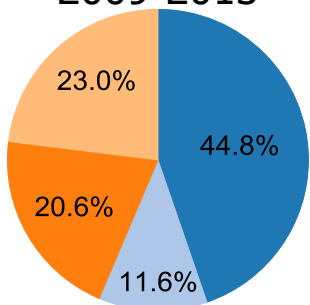
2004-2006



2007-2008

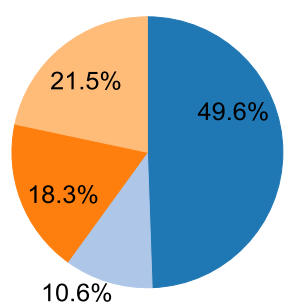


2009-2013

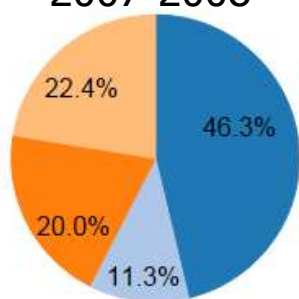


First Time Lodgers

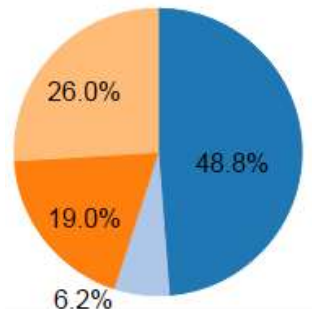
2004-2006



2007-2008



2009-2013



- Midwesterners are declining as a proportion of first time and repeat lodgers, though still account for about half of US lodgers in each time period
- Western states capture an increased proportion of first-time lodgers, as well as repeats in 2009-2013
- Northeast states represent increased proportion of repeat lodgers, but a much smaller share of first-timers

Legend

- Midwest
- Northeast
- South
- West



US Anglers and Lodgers: Summary



- The numbers of American anglers and lodge residents to the Northwest Territories has dropped significantly over the past 15 years, bottoming out since 2009
- US Lodgers and Anglers have gotten older faster than their Canadian counterparts: it may be that younger visitors have stopped coming
- Even though US lodgers numbered about 100 each year from 2009-2013, about two-thirds of this number were first-timers
- The greatest proportion of first time and repeat anglers hail from the Midwest
- The key “bread and butter” long haul lodging segment in the US is Privileged Empty Nests, but even this group represents a larger share of a quickly-shrinking group of lodgers

Summary and Conclusions



Key Findings

- Canadian non-resident and US anglers show significantly different trends over the past decade as permit-holders and lodgers
- US angling and lodging has 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 adult) opportunities
- In the US, the opportunity may be to focus on the most elite anglers, though even these groups may be aging rapidly



Next Steps

- Deeper dive in to different segments
- Talk to anglers through an angler survey
- Update lodges on our findings