

# KENORA, ONTARIO, CANADA



## KENORA TOURISM SECTOR PROFILE

Invest in North America's Premier Boating Destination

Updated August 2017





## KENORA, ONTARIO, CANADA



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## OPPORTUNITY OVERVIEW

Invest in Kenora and Lake of the Woods

**Kenora is North America's Premier Boating Destination**, connecting local residents, visitors, and cottagers to the Lake of the Woods and its 14,500 islands and 65,000 miles of shoreline—more than all of the Great Lakes combined.

NORTH AMERICA'S  
*Premier*  
BOATING DESTINATION

The community is located in Northwestern Ontario's Region Tourism Organization 13c (RTO13c) which has consistently enjoyed nearly a **half billion dollars in visitor spending** from over **2 million visitors** between 2006 and 2015. Visitors to Kenora's visitor centres increased by **228%** between 2010 and 2016, as the City and businesses invested in year-round attractions, sports events, festivals, new venues, and other amenities that strengthen the visitor experience in Kenora.

Starting in 2006, the City of Kenora made a strategic decision to prioritize growth of visitors and tourism spending in the Kenora Economic Development Strategic Plan, which cast a bold new vision for Kenora as a tourism destination. Since that time, almost **\$30 million in public sector investment** has been made or announced for major infrastructure projects to build the city's tourism infrastructure. With the support of provincial government partners, a highly active local Tourism Committee, a Kenora Brand Leadership Team, and Economic Development Committee, Kenora has enjoyed over **\$61 million in private sector** tourism investment between 2007 and 2012.



Now is an excellent  
time to invest in  
Kenora's growing  
tourism market.



## RECENT INVESTMENTS IN TOURISM

**Kenora is a community that invests in itself and its future as a premier tourism destination.**

Since 2004, the City of Kenora and public sector partners have completed over \$23 million in new tourism infrastructure projects including the Lake of the Woods Visitors Discovery Centre, downtown revitalization of Harbourtown Centre, Kenora Gateway signage & highway infrastructure improvements and Whitecap Pavilion - a covered outdoor venue that hosts year-round events and festivals. Financial commitment to the city's tourism growth is ongoing with an additional \$6 million in planned investment beginning in 2014 for the third phase of redevelopment of Harbourtown Centre. The community's commitment to becoming a tourism destination has attracted private sector investment in hotels, lodges, camps, restaurants, shops, marinas, boat rentals and cruises, outdoor guides, and other tourism business.

Between 2005 and 2012, Kenora enjoyed over **\$84 million** in tourism investment.





## PRIVATE SECTOR SUCCESS

### Annual Revenue Growth: 20%

Large investors and small businesses alike are flourishing in Kenora as the number of tourists is increasing in response to the city's focused tourism development strategy. Investors like the Chia Group have invested millions of dollars in multiple Kenora tourism businesses that collectively enjoyed over 20% year-over-year revenue growth in 2010, 2011, and 2012 by offering a unique premium visitor experience for both business incentive travelers and soft adventure tourists.

### Recent Chia Group Investment in Kenora:

*Grace Anne II Yacht, a 85ft Mahogany Yacht Sleeps 8. \$25,000 for 3-day 2-night chartered cruise.*

*Grace Anne Lodge (2012), a 7,000 sq.ft. luxury lodge sleeps 20 in 10 suites.*

*Floating Lodge (2012), this unique lodge on pontoons sleeps 10 in five bedrooms.*



**Grace Anne II Yacht**

*Two Bears Marina (2012), Large 20,000 sq.ft. facility includes convenience store, gas, 225 docking slips, and winter storage*

*Waterview Inn (2011) Remodeled 20 room hotel.*

*Wharf Marina (2005) Located in Harbourtown Centre, the marina offers docking for convenience store and gas patrons.*

*“There are two reasons we are here: First, we are business people and we see the opportunity in Kenora. With all the wealth seasonally positioned in the area, there is construction and new development in Kenora all the time – plus a wealth of population within an eight hour driving radius – a lot of people and a lot of money.*

*The second part is passion. Morris Chia, our founder and president, has been a cottager at Lake of the Woods for 30 years.”*

*– Tim Morgan, Vice President The Chia Group*



## Lake of the Woods Brewing Company



LOWBrewCo opened in 2013 and offers local, fresh, handcrafted beer, made from the finest brewing ingredients. Three craft beers are brewed using the traditional kräusening brewing method. Using a variety of two-row malted barley (sourced in the neighboring Prairie Provinces and said to be amongst the best in the world) these handcrafted artisan beers are brewed in small batches using no artificial flavors, additives or preservatives.

## SMALL BUSINESS SUCCESS STORIES

*“Kenora is a big playground for Manitobans and we’re located right on Lake of the Woods. The city is focusing on tourism and we are getting more visitors here all year round.”*

–Taras Manzie, Owner, Lake of the Woods Brewing Co.





## Success Stories:

## The Zen Den

**Investment:** The Zen Den

**Owners:** Lisa and Michael Lyle

**Location:** Harbortown Centre

**Vision:** To be at peace...back to wholeness. The Zen Den welcomes visitors to find their peace through massage, acupuncture, hot stone massage, detox foot bath, SOQI spa, Indigo Biofeedback or one of our detox body wraps.



*“Since our opening in 1994 Kenora has been a great place to start and expand our business. We have enjoyed the benefits and continued growth and revitalization of downtown. From the amazing success of the Matiowski's Farmers Market to the new Whitecap Pavilion and its many events, Kenora continues to enjoy increased tourism and the benefits that go along with it. We are grateful and thrilled to be a part of this success and look forward to the opportunities of sharing ideas with new businesses. The possibilities for new business ventures are endless!” – Lisa Lyle*

## Kendall House Bed and Breakfast

**Investment:** Kendall House Bed and Breakfast

**Owners:** Rob Rheault & Craig Bryant

**Location:** Harbortown Centre

**Vision:** Restored in 1998, Kendall House received the Heritage Foundation Award for the efforts made to maintain the character and charm of the Queen Anne architecture from the Victorian era. Kendall House is conveniently located a few blocks from downtown Kenora and the picturesque harbourfront on Lake of the Woods.

*“Rob and I believe it’s a pivotal time for Kenora and excited to be part of that transition. Our business introduces us to people from all around the world, providing us a career as well as the opportunity to share the history and beauty of Lake of the Woods and Northwestern Ontario”*

- Craig Bryant, Co-Owner





# KENORA'S DESTINATION DEVELOPMENT STRATEGY

## North America's Premier Boating Destination

For generations, Kenora's has drawn visitors who enjoy boating and outdoor activities on Lake of the Woods, where summer cottagers have come for over 100 years to enjoy the region's pristine environment. The City of Kenora and the Lake of the Woods Economic Development Commission have recognized the growing importance of visitor spending in the local economy and are taking action to prioritize growth in the city's tourism sector.

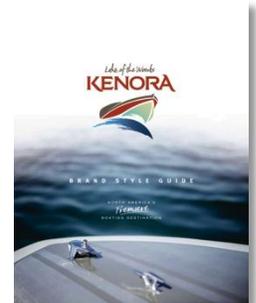
In addition to making direct investments in tourism assets, in 2011-2012 the City of Kenora undertook an extensive visioning and branding exercise to position Kenora as **North America's Premier Boating Destination**. The visioning process resulted in a well-defined brand promise, coupled with logos, visuals, and a marketing plan to communicate the feeling and story of Lake of the Woods, and convey the experiences available on the lake to a target market of boating enthusiasts and visitors who earn high average family incomes (in excess of \$78,000) and have disposable income to enjoy multi-night or multi-week stays.

To make the envisioned identity a reality, the community has identified a set of priority actions that are being implemented over a five-year horizon to deliver a premier experience to visitors. The term "premier" means the best. To deliver the best experience, all levels of government are actively working together with tourism businesses in Kenora to deliver premier events, unique accommodations, memorable experiences, and high-quality amenities. Kenora has a highly-active brand leadership team and tourism committee who are committed to implementing an aggressive tourism product development strategy and a robust regional tourism marketing campaign. The Brand Leadership Team is currently implementing over 80 key tasks and activities that will deliver a premier experience to Kenora visitors.

## Kenora's Brand Promise

Kenora is North America's Premier Boating Destination. We are the connection to Lake of the Woods and its 14,522 islands. Through our events and amenities we celebrate our history and build our future. We are stewards of the lake, nurture its pristine environment, and live the lake life.

## Kenora's Logo and Style Guide



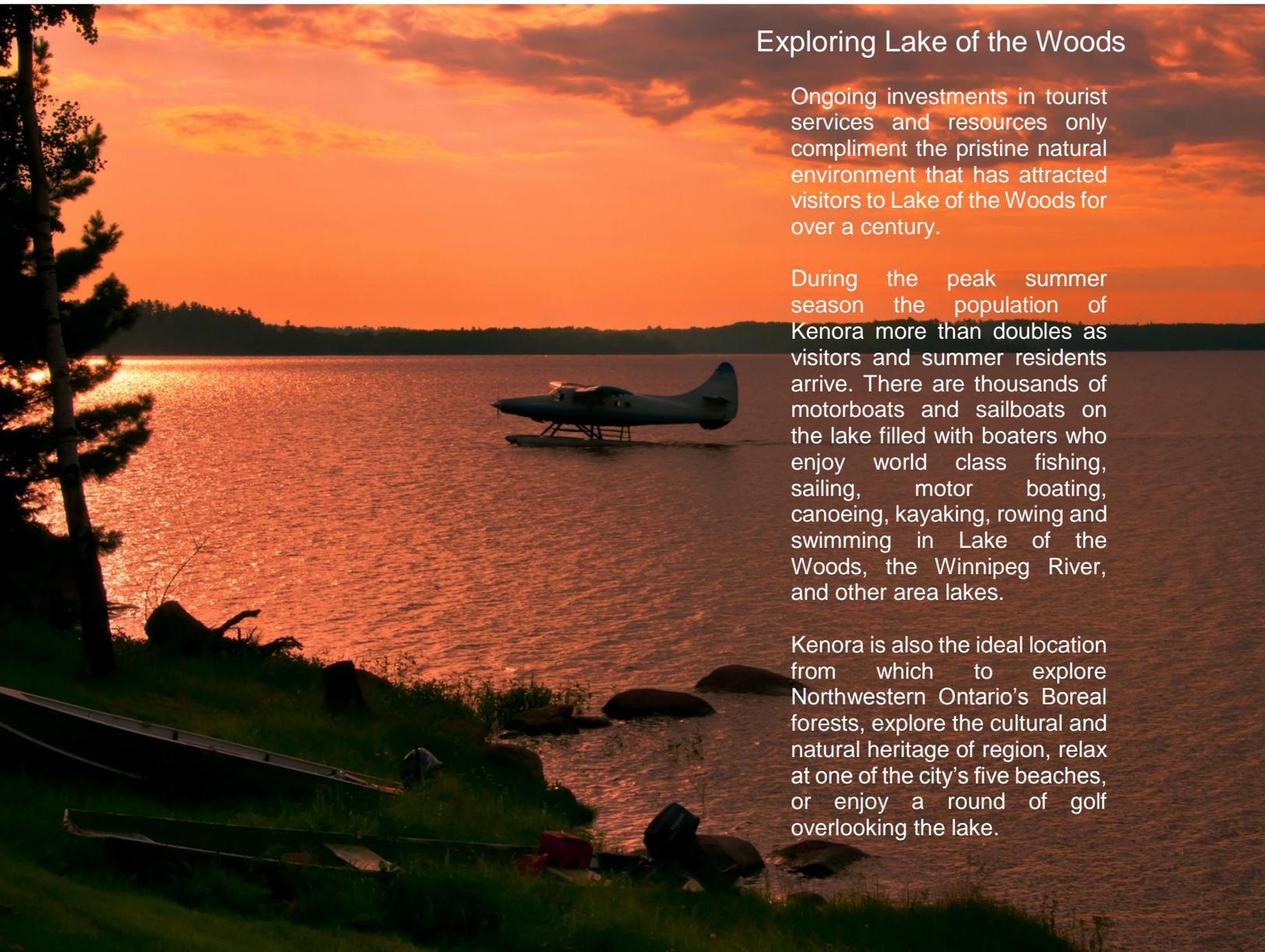
## Experience on Lake of the Woods



Credit: Grace Anne II, Lake of the Woods



## KENORA'S NATURAL TOURISM ASSETS



### Exploring Lake of the Woods

Ongoing investments in tourist services and resources only compliment the pristine natural environment that has attracted visitors to Lake of the Woods for over a century.

During the peak summer season the population of Kenora more than doubles as visitors and summer residents arrive. There are thousands of motorboats and sailboats on the lake filled with boaters who enjoy world class fishing, sailing, motor boating, canoeing, kayaking, rowing and swimming in Lake of the Woods, the Winnipeg River, and other area lakes.

Kenora is also the ideal location from which to explore Northwestern Ontario's Boreal forests, explore the cultural and natural heritage of region, relax at one of the city's five beaches, or enjoy a round of golf overlooking the lake.

| Visitor Stats  | Key Figure                                |
|--|---|
| Total spending by visitors to RTO 13c (2014)                               | \$481 Million                             |
| Annual spending by seasonal residents and cottagers                        | Over \$85 million                         |
| Total person visits to RTO 13c (2014)                                      | 2.06 million                              |
| Estimated number of power boats and sailboats on the lake                  | 8,000 to 10,000                           |
| Northern Ontario Tourism Regional Tourism Organization 13c Strategic Goal: | 100% increase in tourism receipts by 2020 |



## CULTURAL AND HERITAGE TOURISM ASSETS

**Kenora offers over 450 resources and assets that support cultural tourism** including the Lake of the Woods Museum, Lake of the Woods Cemetery, Mather-Walls House, Kenora Library, and Lake of the Woods Ojibway Cultural Centre, and cultural events held by regional First Nations Tribes. Kenora is a place whose ancient landscape and human origins are still a part of daily life. The city is the point where Canada’s east and west meet and where European and Aboriginal cultures share the land and a history. Events such as the Common Ground Spring and Fall Feasts are held on Tunnel Island and other popular cultural experiences include cemetery tours and the Ice Candle Festival of Lights at Lake of the Woods Cemetery.

## ECO TOURISM ASSETS

The opening of the **Pathway of the Paddle** has unlocked new ecotourism potential for Kenora as a starting point for exploring the vast environmental reach of Northwestern Ontario’s water paths. The wildlife, the scenery and the lack of ‘civilized’ impact allow explorers to immerse themselves in what has been described as a “serengeti-like spectrum of wildlife” including waterfowl and raptors, moose, otter, deer, weasels, marten, fox, and beaver while paddling the big waters of Lake of the Woods.

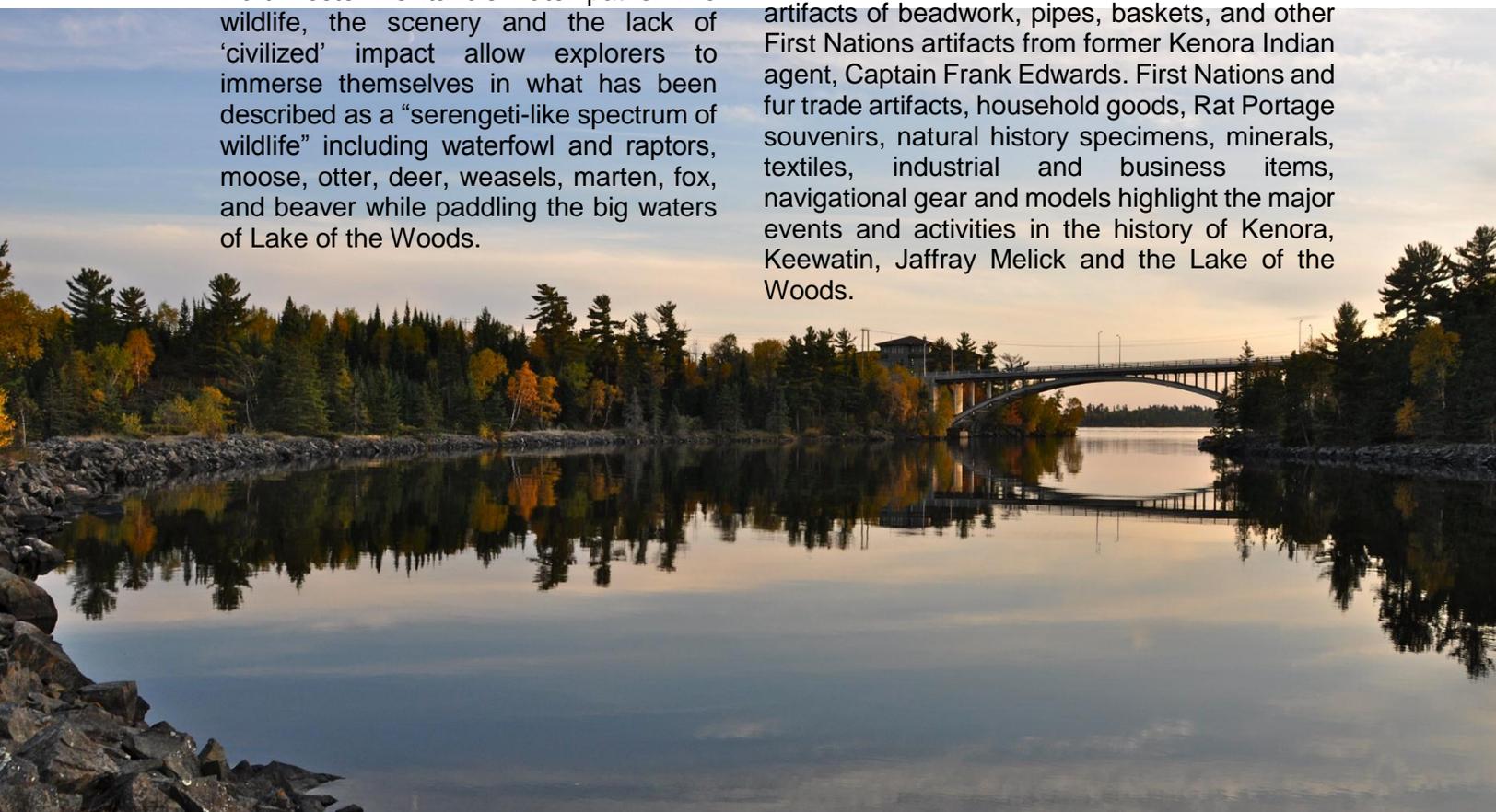


Figure 1 Cultural Tourism Resources 2011

| Cultural Tourism Resources   | In Kenora  | In Kenora District |
|------------------------------|------------|--------------------|
| Creative Cultural Industries | 29         | 99                 |
| Community Organizations      | 23         | 89                 |
| Spaces and Facilities        | 2          | 8                  |
| Cultural Heritage            | 83         | 178                |
| Natural Heritage             | 21         | 110                |
| Festivals and Events         | 42         | 120                |
| Additional Resources         | 250        | 764                |
| <b>Total</b>                 | <b>450</b> | <b>1368</b>        |

Source: Kenora District Resource Mapping Project



### Lake of the Woods Museum

The award-winning Lake of the Woods Museum is one of the finest small museums in Canada with a collection of over 25,000 artifacts that are illustrative of the area's history. The nucleus of the collection was a donation of over 300 artifacts of beadwork, pipes, baskets, and other First Nations artifacts from former Kenora Indian agent, Captain Frank Edwards. First Nations and fur trade artifacts, household goods, Rat Portage souvenirs, natural history specimens, minerals, textiles, industrial and business items, navigational gear and models highlight the major events and activities in the history of Kenora, Keewatin, Jaffray Melick and the Lake of the Woods.



## YEAR ROUND TOURISM DEVELOPMENT

While Kenora’s summer season represents the largest portion of the city’s annual visitors, much of Kenora’s tourism visitor growth is occurring in the shoulder and winter seasons. From 2010-2013 RTO13c experienced **112% growth** during the winter months. Visits to cultural performances, festivals, hunting and sports events are key components of the strategy to extend the visitor season. These attractions were visited by over a quarter million visitors to RTO13c in 2013 (225,000 person visits) and between 2010 and 2013 the RTO13c region experienced **double-digit growth** in visitors for cultural performances, festivals and fairs, hunting and sports events.

“Year round tourism is a central part of Kenora’s tourism development strategy.”  
 - Megan Dokuchie,  
 Economic Development Officer

Table 1 Growth In Visits to RTO13c by Season

| Season           | 2010      | 2011      | 2012      | 2013      | Growth 2010-2013 |
|------------------|-----------|-----------|-----------|-----------|------------------|
| Spring (Apr-Jun) | 474,300   | 592,700   | 629,500   | 530,900   | <b>12%</b>       |
| Summer (Jul-Sep) | 873,900   | 902,800   | 973,400   | 954,000   | <b>9%</b>        |
| Fall (Oct-Dec)   | 297,100   | 465,000   | 400,300   | 305,900   | <b>3%</b>        |
| Winter (Jan-Mar) | 191,700   | 336,300   | 429,400   | 406,900   | <b>112%</b>      |
| Total            | 1,837,000 | 2,296,800 | 2,432,600 | 2,197,700 | <b>20%</b>       |

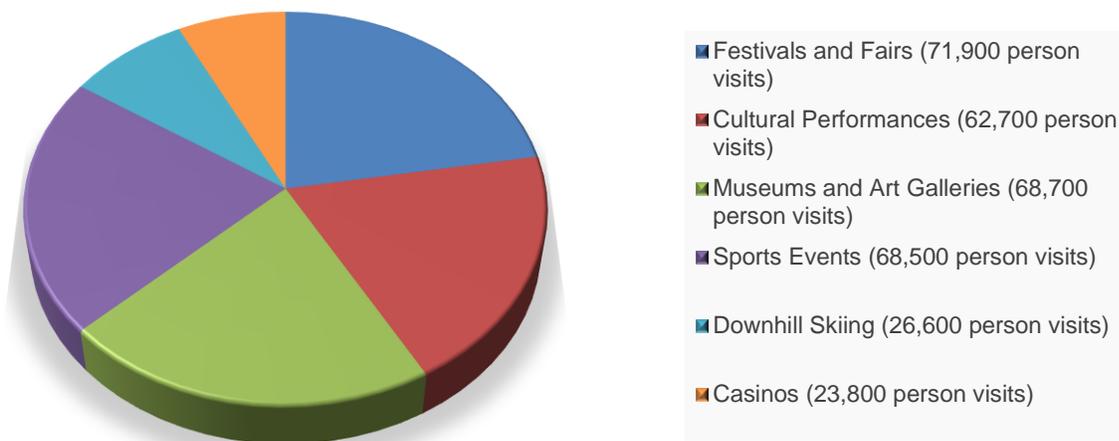
Source: RTO13c data profiles 2010-2013, Ontario Ministry of Tourism

Table 2 Growing Demand for Year-Round Activities, Selected Markets  
 Total Person-Visits by Activity, RTO 13c

| Activity              | 2010   | 2011    | 2012    | 2013   | Growth 2010-2013 |
|-----------------------|--------|---------|---------|--------|------------------|
| Cultural Performances | 56,100 | 66,700  | 60,500  | 62,700 | <b>12%</b>       |
| Festivals/Fairs       | 52,900 | 47,100  | 50,100  | 71,900 | <b>36%</b>       |
| Hunting               | 31,600 | 134,600 | 102,500 | 55,300 | <b>75%</b>       |
| Sports Events         | 47,800 | 36,900  | 52,100  | 68,500 | <b>43%</b>       |

Source: RTO13c data profiles 2010-2013, Ontario Ministry of Tourism

Figure 2 Person-Visits to RTO13c for Year-Round Attractions, 2013





## Events, Festivals, and Attractions Extend the Draw for Visitors

Kenora and the surrounding communities are bustling with world class events, festivals and attractions that are set in the natural picturesque beauty of Lake of the Woods. Kenora's fall, winter, and spring tourism season is driven by highly-active winter sports including hockey, indoor swimming, cross-country skiing, downhill skiing, snowmobiling, ice fishing and daily ice skating in Whitecap Pavilion. The Winter Carnival and a succession of sports tournaments draw teams and visitors to Kenora throughout the season.

Looking forward, ongoing development at Kenora's the Mount Evergreen Ski Hill in Kenora – in combination with competitive sports events - will bolster local tourism spending throughout the winter season.

## Kenora's Mount Evergreen Ski Hill





## ANNUAL FESTIVALS



**Harbourfest** is Kenora's largest celebration of the Lake of the Woods and features a variety of activities themed around water such as canoe jousting and the wooden boat show and parade. The three day event includes multiple cultural and performing artists and each year a headlining band performs on the Harbourfront. Previous acts include: Paul Brandt, Loverboy, Platinum Blonde, Honeymoon Suite, Trooper, Terri Clark, Blue Rodeo, Crash Test Dummies, Tim Hicks, Daughtry, The Sheepdogs, Three Days Grace, Big Sugar, Our Lady Peace, and Hedley.

**Music festivals and performances continue throughout the Summer** and include the **Harbourfront Open Air Concert Series** presentations on Thursdays (July and August), a July performance by the **Winnipeg Symphony Orchestra** in Harbourtown Centre and the **Coney Island Music Festival**. There is also a weekly **Musicians Jam Session** on Wednesday nights at Anicinabe Park, where freelance musicians, instrumentalists as well as vocalists, both from Kenora as well as tourists perform in front of a crowd of friendly fans and people passing by.

The **Kenora Winter Carnival** is the premier winter event in Kenora, held in Whitecap Pavilion, drawing visitors for the **Great Canadian Canoe Race**, the **Copperfin Cup** boot hockey, **Snow Sculpture Contest**, evening fireworks and other events.

The **Kenora Agricultural Fair** has been held in Kenora for over 100 years and includes agricultural exhibits, a regional vegetable contest, arena and midway entertainment, and kids games.

**Mike Richards Charity Golf Tournament** has been held at the Kenora Golf and Country Club in July every year since 2010. Local NHL player Mike Richards hosts the tournament to give back to his hometown community. In the first seven years more than \$250,000 was raised to support the Cancer Care Foundation and the Kenora and Lake of Woods Regional District Community Foundation.

Other cultural events in Kenora include the First Nations Pow Wows, Lake of the Woods Arts Community's Open Studio Tour, and regular programmed events at the Lake of the Woods Museum. The Matiowski Farmers' Market occurs on Wednesdays during the Summer months where locals and visitors find a variety of organic foods and locally grown fresh produce, as well as, local artwork created by area artisans, baked goods, and meats.



## Fishing Events

Kenora's fishing tournaments draw thousands of fisherman each year who come to catch the trophy size Walleye, Northern, Bass, Musky, and Sturgeon fish that make Lake of the Woods famous. The **Shaw Kenora Bass International** ([www.kbifishing.com](http://www.kbifishing.com)) is a catch and release tournament that takes place every year. When the tournament began in 1988 there were 43 teams competing and the recent 2016 event saw more than 100 entries. The event brings thousands of avid anglers to the local area to compete for tens of thousands of dollars in prize money. Recently relocated from Minaki, ON in 2015 the **Kenora Walleye Open** is one of North America's premier Walleye tournaments. This event brings in over 100 teams and has a final prize of over \$35,000! Other tournaments in the area include the **Bronze Back Bass Fishing Tournament** that occurs in Kenora on Coney Island in August, the **Lake of the Woods Musky Bowl** the **Canadian Esoc Association Musky Challenge**, the **Shoal Lake Big Bass Classic**, and the **Black Sturgeon Bass Tournament** (Hidden Trail Resort, Kenora).

## Sailing & Rowing Regattas

The annual **Lake of the Woods International Sailing Association (LOWISA)** Regatta began in 1966 and draws hundreds of sailors of all skill levels from across North America for a week long boating regatta that weaves through some of the best freshwater sailing in the world. The **Kenora Rowing Club** hosted the North West International Rowing Association's Championships Regatta in 2012 and the 2017 Canada Summer Games rowing events. Due to its ability to host national and international size events The Kenora Rowing Club located at Garrow Park has now gained the reputation as the mid-Canada rowing centre of excellence.

## Shaw Kenora Bass International





## Sports Events

Sports events are one of the largest draws for visitors to Kenora, especially in the shoulder and winter seasons. In 2012, Kenora hosted 16 hockey tournaments, 10 baseball tournaments, five soccer tournaments, and four swimming tournaments, as well as tournaments for rowing, golf and skiing. Each of these tournaments drew out-of-town teams including teams from Manitoba and beyond the immediate region. The city has also hosted major regional and national sports tournaments including multiple championship tournaments and the Allen Cup Hockey Tournament. In 2017, Kenora also played host to the Scotiabank Hockey Day in Canada.

Kenora's enthusiastic sports clubs also organize a variety of events that draw visitors. Since 1946, the **Mount Evergreen**

**Ski Club** has been a vital part of Kenora's outdoor recreational scene, offering the region's best in both downhill and cross country venues. The Kenora Borealis Multisport Triathlon, organized by the **Kenora Borealis Club**, encourages a healthy life style that includes endurance sports. The **Kenora Golf and Country Club** organizes multiple tournaments throughout the season.

Table 3 Major Recent Sports Tournaments and Events Hosted in Kenora

| Major Sports Events Hosted in Kenora                            | Year  |
|---|---|
| Ontario Federation of School Athletic Association Championships | Soccer- 2006, Volleyball - 2000, 2003, 2008, 2010<br>Basketball- 2004 |
| Allan Cup Hockey Tournament                                     | 2011  |
| Manitoba Provincial Cross Country Skiing Championship           | 2011  |
| Sunset Country Regional Figure Skating Competition              | 2011 and 2012   |
| Renwick Cup Hockey Tournament                                   | 2011 and 2013   |
| Western Regional's Hockey Telus Cup                             | 2013  |
| Scotiabank Hockey Day in Canada                                 | 2017  |
| Canada Summer Games - Rowing                                    | 2017  |
| North American First Nations Hockey Tournament                  | Annually  |
| Multiple Hockey Schools   | Annually  |

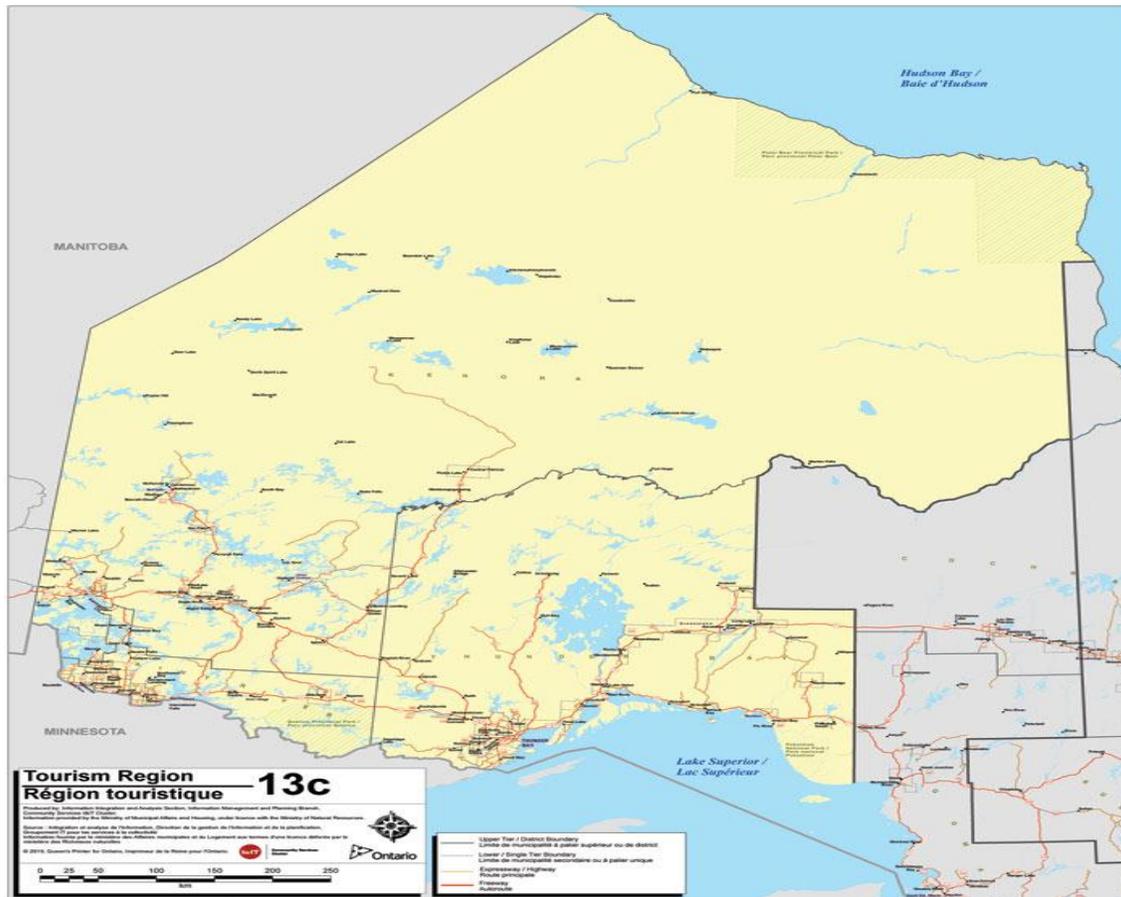




# Tourism Region 13c VISITORS

Established Visitor Markets: Ontario, the United States, and the Rest of Canada

Figure 3 Tourism Region 13c



**Ontario residents represent the largest segment of visitors to RTO13c**, with approximately 1,087,200 person-visits from Ontario residents in 2014. Visitors from Ontario represent a significant portion of spending in RTO13c at **40%**.

**Visitors from other parts of Canada are also an important market.** The RTO13c benefited from approximately 470,600 person-visits from Canadians from provinces outside of Ontario. Despite the large number of person-visits Canadian visitors to RTO13c from outside of Ontario represented only **15%** of spending in the region in 2014.

**The United States is the largest spending market in RTO13c**, accounting for 23% of in-person visits but representing **43%** of the spending in the region with a total of **\$207,481,000** in 2014.



Table 4 Visits and Spending in RTO13c in 2014

| Origins                       | Total Visits | Share of Visits | Spending (\$) | Share of Spending |
|-------------------------------|--------------|-----------------|---------------|-------------------|
| To RTO13c                     | 2,054,600    |                 | \$481,276,000 |                   |
| Origins of Visitors to RTO13c |              |                 |               |                   |
| From Ontario                  | 1,087,200    | 53%             | \$189,991,000 | 40%               |
| From Other Canada             | 470,600      | 23%             | \$71,592,000  | 15%               |
| From United States            | 476,400      | 23%             | \$207,481,000 | 43%               |
| From Overseas                 | 20,400       | 1%              | \$12,212,000  | 2%                |

Source: RTO13c (2014)

See Appendix E for more detailed statistics on visitors to RTO13c (2014).

## Kenora's Target Visitor Market

### Boaters, Fishers, & Swimmers Enjoying Outdoor Recreation

**Boaters are moderately affluent pleasure travelers with average family incomes in excess of \$78,000.**<sup>1</sup> Boaters and swimmers are well-represented in all regions of Canada but most people (93.4%) tend to travel primarily within their own province or region to swim and boat. They tend to be younger than the average Canadian Pleasure Traveler and are over-represented among young singles, young couples and mature families (i.e., those with teenage children).



**Canada has a large boating market that is poised for strong near-term growth. There are an estimated 4.3 million boats in Canada and approximately 35 percent of Canadians went boating in 2012.**<sup>2</sup> According to the Canadian Travel Activities and Motivations Survey, approximately 62% of adult Canadians (15.3 million), participate in outdoor activities while on an out-of-town pleasure trip of one or more nights. About one third (30.6%) of adult Canadians go swimming and boating while on an out-of-town, overnight trip of one or more nights, a national market of 7.58 million adults. The desire to boat and swim is a central driver in selecting a destination; among Canadians that go swimming or boating, 27.2% (2.06 million adults) reported that this activity was the main reason for taking at least one trip.

<sup>1</sup> Source: Travel activities and motivations survey — Canadian travel market

<sup>2</sup> Source: 2012 Canadian Recreational Boating Industry Economic Impact Study, NMMA Canada



**The US also boasts a large boating population, including many who come to Kenora each Summer. Of the 238 million adults living in the United States in 2011, 34.8 percent, or 83 million people, participated in recreational boating.** The Great Lakes region is home to the greatest number of recreational boaters; approximately two out of ten boaters (16 million adult boaters) lived in the Great Lakes region in 2011. The Lake of the Woods extends into Minnesota, which has 813,000 registered recreational vessels, ranking in 2011 as the state with the 2<sup>nd</sup> highest number of recreational vessels in the US, after Florida.<sup>3</sup>



### Why They Go

According to the Canadian Travel Activities and Motivations Survey, swimmers and boaters seek vacation destinations with many activities for adults and children that are both relaxing and provide an escape from their day-to-day environment.

### Where They Stay

While traveling, swimmers and boaters tend to stay at public and private campgrounds or at lakeside or riverside resorts. Recreational sports and other active recreation visitors earn incomes well above the average and prefer luxury, raising the importance of offerings at higher end resorts that offer a country club atmosphere.<sup>4</sup>

### What They Like to Do

While traveling, swimmers and boaters are:

- ✓ **Highly active in family-oriented activities including:**
  - Sports and games and horseback riding
  - Other water-based activities, including sailing, fresh water scuba and snorkeling
  - Strenuous, outdoor activities including downhill skiing and cycling
- ✓ **They are more likely than average to attend sporting events** including:
  - Amateur tournaments
  - Professional sporting events
- ✓ **They attend cultural and entertainment activities** while on trips including musical concerts, festivals, attractions and theme parks and exhibits.
- ✓ **They are especially likely to take part in participatory, cultural experiences** such as participatory historical activities.<sup>5</sup>

<sup>3</sup> 2011 Recreational Boating Statistical Abstract. See [http://nmma.net/assets/cabinets/Cabinet445/2011\\_abstract\\_preview.pdf](http://nmma.net/assets/cabinets/Cabinet445/2011_abstract_preview.pdf)

<sup>4</sup> Source: Ontario Tourism Product Assessment 2009

<sup>5</sup> Source: Canadian Travel Activities and Motivations Survey



# INVESTMENT OPPORTUNITIES



- |   |  |  |
|---|--|--|
| <p><b>Selected Development Opportunities</b></p> <ul style="list-style-type: none"> <li>— Harbourtown Centre</li> <li>— Keewatin</li> <li>① Ride Out Bay</li> <li>② Highway to Heaven</li> <li>③ Kenora Rec Centre</li> <li>④ Kenora Shoppers Mall</li> <li>⑤ Anicinabe Park and Beach</li> </ul> | <p><b>Tourism Assets &amp; Landmarks</b></p> <ul style="list-style-type: none"> <li>⑥ Lake of the Woods Discovery Centre</li> <li>⑦ Whitecap Pavilion</li> <li>⑧ Lake of the Woods Museum</li> <li>⑨ Coney Island Park and Beach</li> <li>⑩ Tunnel Island</li> <li>⑪ Mt. Evergreen Ski Hill</li> </ul> <p>  Docks               Marina              ..... Railroad<br/>  Launch               Wharf         </p> | <p><b>Recent Acquisitions and Developments</b></p> <ul style="list-style-type: none"> <li>⑫ Lake of the Woods Brewing Company</li> <li>⑬ Good Things Inc.</li> <li>⑭ Winnipeg Sports and Leisure</li> <li>⑮ Chia Group</li> </ul> <p>  Kenora Parks &amp; Beaches<br/>  Kenora Recreation Centre<br/>  Kenora Golf &amp; Country Club         </p> |
|---|--|--|

**There are many opportunities to invest in Kenora’s growing tourism market** in the areas of accommodations, outdoor recreation, marinas and boating services, entertainment, dining and retail, and development of unique ecotourism and cultural tourism experiences and itineraries. Fortunately, Kenora offers an abundance of available property and land with waterfront views, water access, and commercial development areas. The City of Kenora owns several available properties such as the property locals refer to as “Highway to Heaven” because of its existing road service access and spectacular views of the lake. Privately held land is also available, such as Ride Out Bay, a large land segment that is adjacent to Kenora’s former pulp mill site.



## Opportunities in Accommodations

A market study by the City of Kenora has confirmed that adequate demand exists for a boutique high end hotel or resort to serve the visitor market. The glamorous camping or “glamping” market is also one of Kenora’s growing markets as the region attracts high earning families seeking a unique luxury outdoor experience. Many types of lodging businesses have performed well in Kenora, including high end RV camps, yurt accommodations, lodges, resorts, bed and breakfast establishments, and other interesting accommodation services that offer outdoor adventure seekers a memorable experience. Opportunities exist for public-private partnerships to develop camping and cabin accommodations at the city’s Anicinabe Park and also exist for hotel development in partnership with the Kenora Rec Centre’s planned future expansion.

**Annual occupancy rates in Kenora have traditionally exceeded the average for Ontario.** Average daily rates (ADR) for hotel chains in Kenora from April 2012 to April 2013 were \$102.32, up 8.1% from \$94.61 in the same period for 2008-2009. Occupancy rates and ADR for chain hotels in Kenora peak in the summer months with the highest occupancy rate at of 91.1% (July, 2012) and the highest ADR at \$111.71 (August, 2012). Revenue per available room (RevPAR) also peaked at \$99.12 (August, 2012). Winter occupancy ADR and RevPAR is lowest in December, but increased in 2012 over 2011, supported in part by growth in year-round tourism.

Table 5 Occupancy, ADR, and RevPAR for Ontario and Sub-Markets, 2017

| Market  | Occupancy    | ADR             | RevPAR         |
|---|--------------|-----------------|----------------|
| Ontario   | 69.3%        | \$154.75        | \$107.19       |
| Greater Toronto   | 75.5%        | \$172.27        | \$130.09       |
| Ottawa  | 74.8%        | \$171.57        | \$128.29       |
| Eastern Ontario (incl. Kingston)  | 60.1%        | \$123.53        | \$74.22        |
| Southern Ontario (incl. London, Windsor, Kitchener, Waterloo, Cambridge, Guelph, Hamilton, and Niagara Falls) | 64.4%        | \$135.19        | \$87.10        |
| Central Ontario   | 58.55%       | \$141.76        | \$82.89        |
| North Eastern Ontario (incl. North Bay, Sudbury)  | 57.8%        | \$113.55        | \$65.59        |
| North Central Ontario (incl. Sault Ste. Marie)  | 56.9%        | \$110.46        | \$62.80        |
| North Western Ontario   | 69.5%        | \$117.99        | \$82.03        |
| Thunder Bay   | 72.8%        | \$116.75        | \$84.96        |
| <b>Kenora</b>   | <b>67.8%</b> | <b>\$120.61</b> | <b>\$81.75</b> |

Sources: CBRE Hotels Trends National Market Report, 2017.

Table 6 Annual Occupancy, ADR, and RevPAR for Chain Hotels in Kenora, 12-month period December 2016 - 2017

|               | 2016     | 2017     |
|---------------|----------|----------|
| Occupancy (%) | 68.9%    | 67.8%    |
| ADR           | \$111.53 | \$120.61 |
| RevPAR        | \$76.90  | \$81.75  |

Source: CBRE Hotels Trends National Market Report for RTO 13, 2017.



## Kenora Events Centre

The Kenora Recreation Centre is a major asset for year-round sports tourism and is strategically located within the downtown Harbortown Centre with waterfront access. In 2016, the facility had over 160,000 visits per year for use of the pool, fitness centre, walking track, group fitness and open ice and hosted 37 tournaments, competitions and other events. The Rec Centre is planning a major expansion that would more than double the total size of the centre by adding a new arena that can support market demand for larger events. Past expansions of the Kenora Rec Centre have included successful public private partnerships that include leased facility space to long-term tenants and vendors serving centre members and visitors. A high-end hotel is envisioned as a part of the development plan, creating a unique opportunity to serve sports and other recreational visitors year-round.

## SITE PLAN





## Public-Private Partnerships: Anishinabe Park & Coney Island

Kenora's Beaches & Parks Development Concept<sup>6</sup> has established the vision for public-private partnerships to operate camping and recreation services at Anishinabe Park and on Coney Island. The Anishinabe Park concept plan calls for 10 new winterized camping cabins (\$700k), 13 additional RV sites (\$182k), upgrades to existing RV and tent sites (\$390k), kayak/canoe rental (\$50k), bike rental and storage (\$50k), a splash park (\$250k) and water slide/ice slide (\$500k), boardwalk, hockey rinks on the frozen lake, and more. The total development plan, to be completed in partnership between the public sector and an investor, has an estimated total cost of \$5.9 million for the redevelopment of the RV Park and cabins, public beach improvements and amenities, and many other general improvements including parking, a new stage, golf course access, and several other improvements.

The Coney Island development plan includes partnership opportunities for a portion of the plan's 18 development components, including opportunities to supply expanded new concessions with laundromat & retail capability (\$600k), a kayak/canoe storage and rental area (\$30k), and expanded public docking and boat taxi facility (\$240k). The total estimated cost for all components of the plan is \$2.6 million in improvements for visitors.

Figure 4 Anishinabe Park Concept Plan



Figure 5 Coney Island Concept Plan



Source: Beaches Parks and Trails Development Project Concept Plan



Coney Island Beach

<sup>6</sup> See Kenora Beaches Parks Development Project Concept Plan, available at <http://www.kenora.ca/business/lake-of-the-woods-development-commission/reports.aspx>



## Fishing, Hunting, and Outdoor Sports Opportunities

**The Lake of the Woods and surrounding region has long enjoyed an established market position as one of Canada’s premier world class Muskie fishing destinations.** Successful hunting and fishing resorts and camps in the region are transitioning today to serve a fast growing short-term family visitor market, including generational vacationers (grandparents traveling with grandchildren).

A portion of the region’s lodge owners and operators are approaching retirement, creating an opportunity for the right investor to purchase and grow an established lodge while serving new growth markets.

### Kenora Tourism Success Story

Investment: **Perch Bay Resort**  
Owners: Bill & Judy Vivian  
Website: [www.perchbay.com](http://www.perchbay.com)

Vision: Imagine a place where families go to spend time together. Imagine a place where friends go to sit by the campfire, swim at the beach and catch big...BIG...fish. Imagine a resort on the Winnipeg River, minutes from downtown Kenora seconds from some of the best walleye, bass, northern pike and muskie fishing anywhere. Stand with your kids and catch fish off the dock, get in a boat and fish in the bay or five minutes up river at the Norman Dam. It's all here. This is Perch Bay Resort, your family vacation paradise.

*“At Perch Bay, we are aptly named after this plentiful small species of fish. Standing on our docks, you'll catch perch, perch and more perch! And as every angler knows, where there's little fish....there is big fish!*

*“One of the most important things to keep in mind is the extremely high success rate that our fishery offers to all of the members of your family. Kids love spending days fishing off the docks and families return to Perch Bay year after year. Each year the deer hunting in our area continues to be well managed as the numbers of game animals continues to rise, bringing visitors in the Fall and Winter seasons. Bill and I raised our family in Kenora and it's been fantastic.” – Judy Vivian, Co-Owner*





## Opportunities for Docks, Marinas and Boating Services

The 14,000 islands on Lake of the Woods offer visitors and cottagers a secluded get-away, but also create the need for boat-accessible entertainment venues for visitors and residents to gather and socialize. Much of the available docks and slips in Kenora are located a relatively long distance from the Harbourtown Centre where the city’s dining, shopping, and entertainment is clustered. While some docking exists in Harbourtown Centre, the area will greatly benefit from additional capacity in docks, marinas, and boating services to connect visitors and cottagers to shopping in Harbourtown Centre.

**There is significant unmet demand for docks and related services which is increasing, driven by the growing number of vessels --especially larger vessels -- on the lake.** While there are few official statistics collected on the number of boats on Lake of the Woods, based on extensive discussions with boating business owners and other people knowledgeable of the Lake of the Woods and boating industry, there are approximately 8,000 to 10,000 powerboats and larger sailboats on the lake each Summer and about 1,000 boats sold into the region each year, which create a large market for dock and marina services.

Figure 6 Two Bears Marina



“The Mid-Canada Boat Show in Winnipeg has had a steady increase in attendance over the last ten years and attracted over 17,000 adult boaters and fishermen in 2013. There has been a steady increase in the number of boats sold at the show as well as the dollar volume done. In 2013, during the 32 hour show, there were 164 units over \$15,000 sold for a dollar volume over \$5 million.”

- Jim Flood, Bowline Yachts Ltd. and Organizer, Mid-Canada Boat Show





## Opportunities in Harbourtown Centre and Keewatin

Harbourtown Centre and Keewatin are the city's two vibrant commercial districts and are ideal locations for investment in dining, shopping, recreation, hotel accommodations and other visitor services. Community improvement plans for both **Harbourtown Centre** and **Keewatin** offer added incentives for investors.

Harbourtown Centre at Dusk

**In Harbourtown Centre**, visitors can spend an afternoon exploring the shops, enjoy fine dining or delicious fish and chips, catch an afternoon yoga class, stop for a spa treatment, or relax after a day on the lake with a locally brewed craft beer. The retail mix existing in Harbourtown Centre is diverse, with significant capacity for growth. The diversity of locally available ingredients creates an opportunity for dining experiences in Harbourtown Centre that offer a culinary tourist a chance to explore local foods such as smoked meats and fish. The Kenora's Shoppers Mall is also located in the Harbourtown Centre and currently has vacancy for an anchor tenant.

Keewatin on the west side of Kenora is a charming and quaint mixed residential and commercial community that is ideal for development in proximity to existing marinas, parks, beaches, and commercial businesses.

## Cultural Tourism, Ecotourism, and Outdoor Guide Opportunities



The **City of Kenora's Municipal Cultural Plan**<sup>7</sup> is a guiding document for development of cultural assets and supporting development of cultural tourism. The plan identifies ten overarching themes to promote development in Kenora's cultural resources which include:

- Raising the Profile of Culture
- Integrating Culture into Planning
- Addressing Cultural Facility and Gathering Space Needs
- Maintaining and Developing Aboriginal Partnerships
- Fostering and Attracting Cultural Industries
- Building Cultural and Environmental Tourism
- Investing in Cultural Development

**There are several opportunities for destination development around unique itineraries** for cultural and ecotourism. In addition to scenic recreation sites, many nearby islands offer a fascinating history such as the Sultana gold mine, the POW Camp and other locations.

**There are opportunities for developing Aboriginal cultural experiences**, in partnership with First Nation communities. The creation of working relationships between First Nations and non-First Nation peoples is the focus of the Common Land, Common Ground movement, which has created partnership between the municipality of Kenora, three nearby First Nation reserves and the Grand Council of Treaty #3, that together were gifted the land on Tunnel Island, a 140 acre forested green space and park, located in the centre of the Kenora. The Island's central location, in proximity to other cultural tourism assets, may create a unique opportunity for first nations communities to offer an authentic experience where a cultural traveler can find a meaningful personal experience while exploring the Canadian Shield and Boreal Forest.

### Tunnel Island

Due to its geographical placement at the intersection where the Lake of the Woods feeds into the Winnipeg River, the region surrounding the current city of Kenora in Ontario has been a place of movement of people for several thousand years. Ancient people used these lakes and rivers to travel and connect when they stopped on a small island in the meeting point between the lake and river, which is currently known as Waa'Say'Ba'Go' or Tunnel Island. It has held other names in the past such as, Ka'ga'pe'ke'che meaning, "A place to stay over," in Ojibway and also Steep Rock Island.

<sup>7</sup> See Municipal Cultural Plan (2011).

[http://listview.kenora.ca/Files/LOTWDC/Shared%20Documents/Reports%20and%20Plans/Municipal%20Cultural%20Plan%20\(Executive%20Summary\).pdf#navpanes=0&view=FitH](http://listview.kenora.ca/Files/LOTWDC/Shared%20Documents/Reports%20and%20Plans/Municipal%20Cultural%20Plan%20(Executive%20Summary).pdf#navpanes=0&view=FitH)



## KENORA TOURISM PROPERTY INVENTORY

Table 7 Tourism-Related Property Inventory, City of Kenora (Within City Limits), May, 2013

| Category   | Total Units |
|--|-------------|
| Residential Properties on the Water  | 1,113       |
| Single Family Detached On Water  | 741         |
| Vacant Residential/Recreational Land On Water  | 348         |
| Island Under Single Ownership  | 5           |
| Water Lot (Entirely Under Water)   | 19          |
| Accommodations   | 521         |
| Seasonal/Recreational Dwelling - First Tier On Water   | 428         |
| Seasonal/Recreational Dwelling - Second Tier On Water  | 26          |
| Seasonal/Recreational Dwelling - Not Located On Water  | 11          |
| Full Service Hotel   | 2           |
| Limited Service Hotel  | 4           |
| Motel  | 9           |
| Rooming Or Boarding House  | 1           |
| Tavern/Public House/Small Hotel  | 3           |
| Mobile Home/ RV Park   | 34          |
| Bed And Breakfast Establishment  | 3           |
| Dining   | 13          |
| Restaurant - Conventional  | 5           |
| Restaurant - Fast Food   | 1           |
| Restaurant - Conventional, National Chain  | 1           |
| Restaurant - Fast Food, National Chain   | 6           |
| Retail Properties*   | 103         |
| Large Retail Building Centre, Generally Greater Than 30,000 S.F.   | 1           |
| Freestanding Large Retail Stores, National Chain - Generally Greater Than 30,000 S.F.  | 3           |
| Retail - One Storey, Generally Over 10,000 S.F.  | 7           |
| Retail - One Storey, Generally Under 10,000 S.F.   | 51          |
| Neighbourhood Shopping Centre, With More Than 2 Stores Attached, Under One Ownership, With Anchor - Generally Less Than 150,000 S.F.     | 1           |
| Neighbourhood Shopping Centre - With More Than 2 Stores Attached, Under One Ownership, Without Anchor - Generally Less Than 150,000 S.F. | 6           |
| Retail With More Than One Non-Retail Use   | 5           |
| Retail With Office(s) - Less Than 10,000 S.F., Gba With Offices Above  | 16          |
| Retail With Office(s) - Greater Than 10,000 S.F., Gba With Offices Above   | 1           |
| Freestanding Supermarket   | 4           |
| Automotive Fuel Station With Or Without Service Facilities   | 8           |

Continued on following page.



| Category  | Total Units  |
|---|--------------|
| Recreation & Entertainment Establishments   | 18           |
| Cinema/Movie House/Drive-In   | 1            |
| Golf Course   | 2            |
| Ski Resort  | 1            |
| Marina - Located On Waterfront - Defined As A Commercial Facility For The Maintenance, Storage, Service and/or Sale of Watercraft | 6            |
| Recreational Sport Club - Non-Commercial (Excludes Golf Clubs And Ski Resorts)  | 5            |
| Commercial Sport Complex  | 1            |
| Non-Commercial Sports Complex   | 2            |
| Vacant Land Not on the Water  | 922          |
| Vacant Residential Land Not On Water  | 876          |
| Multi-Residential Vacant Lot  | 5            |
| Vacant Commercial Land  | 41           |
| <b>Total Units</b>  | <b>2,690</b> |





## Resources and Support for Tourism

Kenora offers a robust support system to help tourism businesses grow and thrive. A highly supportive and forward-thinking city and provincial government have invested in Kenora's tourism infrastructure. Several funding streams are available to help tourism operators expand and efficiently operate their businesses. National, provincial, regional and local marketing partners have set ambitious goals to double the number of tourists visiting the region over the next decade. A robust labour force development system helps tourism businesses to gain access to a skilled hospitality and cultural workforce. Finally, ongoing investment in public transportation infrastructure - including the Kenora Airport as well as rail and highway infrastructure - assures that visitors can easily travel to Kenora throughout the year.





## Provincial and Local Government Support for Tourism

**Tourism growth is a priority for the City of Kenora and for the Province.** Through ongoing public investment in Kenora’s recreational tourism product, the City of Kenora has demonstrated a long-standing commitment to make Kenora one of Canada’s most beautiful places for both residents and visitors. The region’s Provincial leadership has also demonstrated a commitment to strengthen the region’s ability to attract visitors and develop a robust tourism offering. The Province has provided funding for each phase of the City of Kenora’s Downtown Revitalization Project, provided core funding to the Lake of the Woods Business Incentive Corporation, funded major road improvements and gateway signage, and other infrastructure.



*“We will continue to move forward to make Kenora a place that people want to visit... The Council looks forward to working with the Lake of the Woods Development Commission and other community partners in working towards continuous improvement with all the players coming together as one team to keep building Kenora.” - City of Kenora Mayor, David S. Canfield*

**The Ontario Ministry of Tourism, Culture and Sport** has established a Tourism Investment Strategy which aims to attract private sector investment into Ontario. Support for investment projects include financial incentives, site location identification, familiarization trips, government contacts, senior level meetings, economic impact analysis, market research, tracking, and other services. The Ministry can also provide support for applications to the Northern Ontario Development Program to assist businesses, municipalities, and First Nations in new tourism related product development.



**MP Bob Nault** announced on August 10<sup>th</sup>, 2017 an investment in the Mid-Canada Centre of Rowing Excellence at Garrow Park. “The Kenora Rowing Club is well known as a world-class facility, and it will continue to hold that prestigious title thanks to the \$100,000 investment into key infrastructure upgrades through the Canada 150 Community Infrastructure program. This will facilitate not only the long-term viability of the Kenora Rowing Club, but help contribute to the long-term growth and prosperity of Kenora.”



## The Northern Ontario Heritage Fund Corporation (NOHFC)

The Northern Ontario Heritage Fund Corporation ([www.nohfc.ca](http://www.nohfc.ca)) offers multiple funding programs designed to help municipalities, entrepreneurs and businesses build, expand and grow. Key Programs include:

**Enterprises North Job Creation.** New and existing enterprises that will create jobs in Northern Ontario can gain access to up to \$1 million in funding to offset costs of eligible projects including capital construction costs related to the establishment or expansion of a business, leasehold improvements, purchase of new or used equipment, intellectual capital, staff training, marketing, land servicing, and other expenses. The maximum financial assistance granted by the NOHFC to any project will generally not exceed 50 percent of eligible costs, up to \$1 million. Up to one-half of the NOHFC funding may be in the form of a conditional grant with the remainder in the form of a repayable loan.

**Infrastructure and Community Development.** Offering funding up to \$1 million, this program helps northern communities make the investments necessary to improve critical infrastructure and develop partnerships that find effective ways to create jobs and improve economic prospects in the North.

**Northern Ontario Entrepreneur.** Through this program, NOHFC offers northern entrepreneurs up to \$125,000 of funding per project. The NOHFC may provide a conditional grant generally up to 50 per cent of eligible costs and not to exceed \$125,000 per project. The entrepreneur must make cash investment in the business of no less than 10 per cent of the NOHFC's conditional grant. NOHFC funding, when combined with other provincial and/or federal government funding will generally not exceed 75 per cent of eligible costs.

Figure 7 Southview Inn



*When Audrey and Taras Manzie bought a small roadside motel in Keewatin on the west side of Kenora, they knew they wanted to offer the local community something new. Rather than merely fixing up what was already there, the couple tore down some existing cabins and constructed a 30-seat restaurant in its place. The rest of the lodging property was renovated, and the Southview Inn & Bistro was unveiled. Funding of \$25,000 through the Northern Ontario Young Entrepreneur Program allowed Audrey Manzie to manufacture a signature line of condiments.<sup>8</sup>*

<sup>8</sup> See *Southview Inn and Bistro Success Story*

[http://nohfc.ca/sites/default/files/success\\_story\\_files/southview\\_inn\\_and\\_bistro\\_success\\_story.pdf](http://nohfc.ca/sites/default/files/success_story_files/southview_inn_and_bistro_success_story.pdf)



## FedNor Northern Ontario Development Program

Since April 2006, the FedNor Northern Ontario Development Program ([Fednor.gc.ca](http://Fednor.gc.ca)) has approved more than **\$272 million** in support of 1,386 projects that support community economic development, business growth and competitiveness, and innovation in Northern Ontario. FedNor provides financial support to viable projects led by businesses, municipalities, First Nations, and other organizations and institutions. Funding is available for projects that improve productivity, reach new markets, facilitate access to capital, foster investment, encourage entrepreneurship and cultivate industry collaboration.

See Appendix A for a list of “Best Fit” Government Support Programs for Kenora Tourism Sector Businesses.

## Financial Resources

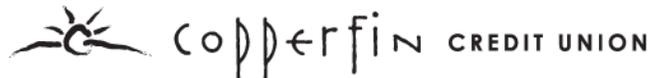
The Lake of the Woods Business Incentive Corporation (LOWBIC) ([www.lowbic.on.ca](http://www.lowbic.on.ca)) is a Community Futures Development Corporation that offers several financial programs and services to support small business growth, including assistance in gaining access to capital for small and mid-sized business and social enterprises.

Figure 8 LOWBIC Services

| Loans  | Guarantees  | Equity Investments  | Other Services  |
|--|---|---|---|
| Up to \$150,000 with competitive interest rates and varying amortization times for the following purposes: <ul style="list-style-type: none"> <li>✓ Business Start-up</li> <li>✓ Business Expansion</li> <li>✓ Existing Business Acquisition</li> <li>✓ Purchase of Assets</li> <li>✓ Working Capital</li> <li>✓ Consolidation of Business Debt</li> </ul> | LOWBIC can also offer financing in the form of an operating line guarantee. For an annual fee of 2% of the guarantee, we will pledge our funds as security. | Funds in the form of equity participation may be provided by LOWBIC to incorporated businesses. The funds invested must assist in the creation or maintenance of permanent or part time jobs in the area. | LOWBIC’s Business Development component provides business advisory services, individual mentoring, group presentations, workshops, seminars, business plans, banking proposals, and is a delivery agent for the Self-Employment Assistance Program offered from Human Resources Development Canada. |

Source: LOWBIC

In addition to larger banks, two small business lending organizations have branch offices in Kenora that serve entrepreneurs and local businesses.



**Copperfin Credit Union** ([www.copperfin.ca](http://www.copperfin.ca)) works with business owners in Kenora to create flexible solutions to meet banking, borrowing and investment needs.

**Business Development Bank of Canada** ([www.bdc.ca](http://www.bdc.ca)) enables the success of Canadian entrepreneurial businesses in all industries, all economic cycles, and all markets by providing:

- 
- Financing to protect cash flow
  - Consulting services to improve profitability
  - Subordinate Financing, a mix of debt and equity financing to share the risks and rewards
  - Venture Capital, for expertise and know-how to build your business
  - Securitization, to help finance vehicles and equipment
  - Smart Tech, to businesses make information and communications technology

## Marketing Resources

### Ontario Tourism Marketing Partnership Corporation (OTMPC)

The **OTMPC** is the lead tourism marketer for Ontario and its North. OTMPC partners with tourism operators for cooperative marketing that markets product or service offerings under the Ontario brand, helping operators to reach key tourism markets that they might not otherwise have access to, or that might be too expensive to pursue independently. OTMPC's initiatives encompass a full range of programs, from advertising, product development, consumer information services and travel publications. Some of the OTMPC's key programs include:

- **Advertising Opportunities** including free listings and events.
- **The Tourism Industry Partner Program (TIPP)** that works with tourism marketing groups to assess their partnership ideas and to provide assistance to help make them happen.
- **The Tourism Event Marketing Program (TEMP)** was created to assist in the marketing of select events and festivals around the province.
- **The Ask the Sales Expert** service allows tourism operators to consult with OTMPC sales staff to help identify OTMPC opportunities that will provide your business with the best return on investment.

### Tourism Northern Ontario (Regional Tourism Organization 13)

The Northern Ontario RTO exists to build a competitive and sustainable tourism Industry in Region 13 that maximizes the region's potential to successfully attract visitors, grow spending, and to achieve the goals and objectives of "**Discovering Ontario, a report on the future of tourism**", and the **Northern Tourism Marketing Strategy**.

The Northern Ontario Regional Tourism Organization is a Not for Profit Regional Tourism Organization that coordinates, aligns and invests in sub-regional programs and is the lead organization for identified pan northern management functions, co-ordination of marketing, product development, workforce and industry training, and investment attraction. In 2011, RTO 13, in partnership with the Northern Office of OTMPC, and on behalf of the Northern Ontario tourism industry, developed a "second generation" marketing strategy for 2012-2017 to grow and develop tourism in the region. Activities to promote the region are guided by the Northern Ontario Tourism Marketing Strategy



2012-2017<sup>9</sup> which has set a goal to double tourism receipts in the region by 2020. Strategies for brand application, media relations, corporate partnerships & paid spokespeople, online presence, social media, and traditional marketing are all components of the region's implementation plan. The strategy forms the basis for successful working relationships among its three sub-regions of Northern Ontario and industry stakeholders, and forms one part of a future destination development plan.

Tourism Northern Ontario has also begun to create a Destination Development Strategy that will support the growth of Northern Ontario's tourism industry from 2013 to 2020 and beyond. The strategy will focus on developing action-oriented recommendations to enhance product development, workforce development, capacity building and investment attraction. Through these recommendations, TNO hopes to create opportunities for public and private sector collaboration and to develop creative solutions to support private sector operation.

### Ontario Sunset Country

Northern Ontario has regional tourism marketing associations (NORTAs), including **Ontario Sunset Country**, which promote the region to consumers of a specific product, experience category or destination. Ontario Sunset Country markets recreational wilderness experiences to travelers who are interested in fishing trips, hunting trips, fishing and hunting lodges/ fly-in trips, and other experiences available in the region. There are 385 members of Ontario's Sunset Country NORTA and most members (62%) are accommodations organizations, many of which are fly-in fishing outposts.

### Tourism Kenora

**Kenora & Lake of the Woods Tourism** promotes the outdoor adventure, fishing, hunting, water sports, winter sports, snowmobiling, unique festivals, and international sport tournaments that occur in Kenora. Kenora has traditionally had a strong contingent of visitors from the Midwestern United States and Province of Manitoba. This has been changing and expanding in the past 15 years to also include an increasing domestic market from Western Canada, and an increase in summer residents. Tourism marketing for Kenora targets these visitor markets, in partnership with local tourism operators.

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<sup>9</sup> See Northern Ontario Tourism Marketing Strategy 2012-2017 available at [http://www.rto13.com/downloads/Northern%20Ontario%20Tourism%20Strategy%20FINAL%20July%2029\\_LOW.pdf](http://www.rto13.com/downloads/Northern%20Ontario%20Tourism%20Strategy%20FINAL%20July%2029_LOW.pdf)



## Tourism Labour Force Resources

Ontario's tourism industry represents 9% of total employment in Ontario and 17% of the province's businesses, from small rural outfitters to large corporate hotel chains. To maintain the competitiveness and success of the tourism industry in Ontario, the Tourism Industry Association of Ontario (TIAO), with funding support from the Ontario Ministry of Tourism, Culture and Sport, has established an Ontario Tourism Workforce Development Strategy 2012-2017<sup>10</sup> that outlines strategies to address the four top workforce development priorities of tourism businesses:

- #1 Training (57% of tourism businesses ranked as a top priority)
- #2 Recruitment (45%)
- #3 Creation of Service Standards (23%) and,
- #4 Compensation (20%)

The strategic plan will address these challenges by fostering an environment of collaboration and coordination, developing a high performance workforce, focusing on workforce attraction and retention, and enhancing information management and research.

### Kenora's Labour Force

The City of Kenora has a population of over 15,300 and is located within the Treaty #3 Area, home to 21 First Nations communities that have a combined population of approximately 25,000. Kenora's highly-skilled workforce is comprised of a working age population (age 25-64 years) of over 8,500 workers. Approximately 12% of workers have a trades certificate or diploma (over 1000 workers), 23% have attained college education and 35% have completed some university education, a Bachelor's degree or higher degree. Businesses in tourism-related sectors such as accommodation services, retail trade, entertainment, and transportation, together account for approximately 38% of Kenora's employment.

Table 8 Kenora Labour Force by Industry, 2017

| Occupation                          | Workers | Share of Labour Force |
|-------------------------------------|---------|-----------------------|
| Total Labour Force                  | 8,873   | 100%                  |
| Tourism Labour Force                | 3,314   | 38%                   |
| Transportation & Warehousing        | 420     | 5%                    |
| Retail Trade                        | 1322    | 15%                   |
| Information and Cultural Industries | 260     | 3%                    |
| Arts Entertainment and Recreation   | 127     | 1%                    |
| Accommodation and Food Services     | 716     | 8%                    |
| Other Services                      | 476     | 5%                    |
| Source: Manifold Data Mining        |         |                       |



<sup>10</sup> See Ontario Tourism Workforce Development Strategy 2012-2017 at <http://www.rto13.com/downloads/Ontario%20Tourism%20WFD%20Strategy%202012-2017.pdf>



Table 9 Kenora Tourism-Related Labour Force by Occupation, 2012

| Occupation   | Workers | Share of Labour Force |
|--|---------|-----------------------|
| All occupations  | 8,552   | 100.00%               |
| Tourism-Related Occupations  | 4,405   | 51.51%                |
| A Management occupations   | 489     | 5.72%                 |
| A1 Specialist managers   | 49      | 0.57%                 |
| A2 Managers in retail trade, food and accommodation services                             | 188     | 2.20%                 |
| B Business, finance and administration occupations                                       | 1,078   | 12.61%                |
| F Occupations in art, culture, recreation and sport                                      | 37      | 0.43%                 |
| F0 Professional occupations in art and culture   | 10      | 0.12%                 |
| F1 Technical occupations in art, culture, recreation and sport                           | 28      | 0.33%                 |
| G Sales and service occupations  | 2,801   | 32.75%                |
| G0 Sales and service supervisors   | 73      | 0.85%                 |
| G2 Retail salespersons and sales clerks  | 414     | 4.84%                 |
| G3 Cashiers  | 176     | 2.06%                 |
| G4 Chefs and cooks   | 118     | 1.38%                 |
| G5 Occupations in food and beverage service  | 146     | 1.71%                 |
| G7 Occupations in travel and accommodation, including attendants in recreation and sport | 104     | 1.22%                 |
| G9 Sales and service occupations, n.e.c.   | 1,047   | 12.24%                |

Source: Manifold Data Mining

## Education & Training Resources

Tourism Kenora is committed to developing employee service skills for consistent delivery to the region's customers, members and guests. Through the Essentials to Service Excellence Hospitality Training, Tourism Kenora helps create a consistent service standard and provides employees with tools and techniques to help build customer satisfaction and loyalty. Training classes are offered through the Lake of the Woods Visitor's Centre and programs can be customized to the needs of hospitality employers.

Confederation College offers four Hospitality and Tourism Programs that include a Cook Apprenticeship, a Culinary Management program, a Hospitality Management program and a Tourism Travel and Eco-Adventure Program, all of which prepare Northwestern Ontario students for careers in the tourism industry. For more information, visit [www.confederation.on.ca/programs/hospitalitytourism](http://www.confederation.on.ca/programs/hospitalitytourism).



The First Nations communities in the region are growing and they are one of the most important sources for accessing the region's labour force. Seven Generations Education Institute was established in 1985 as a consortium between the 10 bands of the Rainy Lake Tribal Area, with the goal of improving the economic status of band members and maintaining traditional cultural and linguistic values. The institution is based in Fort Frances, Ontario and operates satellite campuses in Thunder Bay and Kenora. Program offerings are tailored to the needs of the marketplace, and Seven Generations is skilled at developing new programs in partnership with community colleges or universities, employers, government and other stakeholders. Programs are available to people from all walks of life, and are designed to instill a sensibility toward the cultural heritage and societal issues faced by First Nations and Aboriginal peoples.



Confederation College is a community college based in Thunder Bay, Ontario. The college serves approximately 3,400 full time students across a 550,000 square km area in Northwestern Ontario. Regional campuses are located in the communities of Dryden, Fort Frances, Kenora, Geraldton, Marathon, Red Lake, Sioux Lookout and Wawa. The campus in Kenora offers a variety of postsecondary options designed to meet the education and training needs of workers in the Kenora area. Programs offered by the college range from full-time postsecondary diploma and certificate programs to continuing education or general interest courses as well as contract specialized training for workers with various skill requirements.

Seven Generations offers unique programs to people that need skills in specific trades or types of work. The Kenora campus offers Bachelor and Master's programs including programs in office administration, bookkeeping, and a management development certificate that introduces adult learners to management issues in a variety of industry applications. Other options available to students include an Essential Skills Training for the Workplace program, which allows them to re-engage with the educational system and prepare for additional job-related training programs; the College Readiness Program offers courses designed to prepare students for college level career or technical training; finally, the Secondary Education program offers flexible access to secondary education in order for students to complete a high school diploma. For more information, visit:



<http://www.7generations.org/>



## Recruitment Resources

Many tourism businesses in Kenora benefit from a seasonal workforce that is linked to an influx of summer youth of families from Winnipeg who travel to the region with their families who stay at cottages in the region.

### Shooniyaa Wa-biitong

Shooniyaa Wa-biitong is a large Aboriginal workforce development program headquartered in Kenora that works with the a membership of 16,000 First Nations people in the region to provide training, education, and skills upgrading to prepare workers for jobs. Shooniyaa Wa-biitong works directly with employers in Kenora to find qualified First Nations workers by collecting and screening resumes, hosting recruiting events, providing skills upgrading, and supporting direct recruitment through Anokiwin (“to work”) Job Connect available at: [www.shooniyaajobconnect.com](http://www.shooniyaajobconnect.com)

A portion of the Region’s labour force needs can be met through international work Opportunities Ontario: Provincial Nominee Program. Opportunities Ontario is designed to assist employers who are having difficulty recruiting qualified, skilled workers in Ontario. The program can help Ontario employers who meet the program’s guidelines to recruit foreign workers and international students. Companies investing in Ontario can also access the program to recruit or relocate key employees to ensure the long-term success of the investment. More information on the program is available from Ontario Immigration ([OntarioImmigration.ca](http://OntarioImmigration.ca))

## Wage Subsidies and the Self-Employment Benefit Program

Employers in Ontario’s hospitality sector have access to a \$2/hour hiring incentive when they employ youth aged 15 to 30 through the province’s Summer Jobs Service. This wage subsidy will assist both private and not-for-profit businesses in hiring more summer students.

The **Self-Employment Benefit Program** is designed to provide financial and entrepreneurial support for those who have been, or are on Employment Insurance (EI) or maternity/paternity leave and would like to start their own business. The SEB Program is funded by the Ontario Ministry of Training, Colleges & Universities (MTCU) and is designed to help individuals create jobs for themselves. The program provides:

- Information & assistance with the application process
- Training & counseling for new entrepreneurs
- Support for the business planning and start-up stages
- Financial support for up to 42 weeks.



## Tourism Associations and Networks

**The Lake of the Woods Development Commission (LOTWDC)** was created by the City of Kenora to implement the City's Economic Development Plan. The Commission is an incorporated not for profit agency led by an independent Board of Directors comprised of local business and community leaders. The Commission's operations are supported with core funding from the City of Kenora and revenue generation from outside funders and other activities. The Commission has two primary operating divisions: economic development and tourism. Tourism is focused on tourism marketing, product development, information services, and special events.

**Harbourtown BIZ** manages improvement, beautification and maintenance of lands, buildings and structures in the downtown area, and the promotion of the area as a business and shopping area. The Harbourtown BIZ north boundary starts at City Hall in the west, to the Kenora Shopper's Mall and Kenora Recreation Centre in the east. It includes all businesses from the northerly boundary south to Lake of the Woods. All businesses within this area are considered members of Harbourtown BIZ, and are encouraged to participate in BIZ activities.

**The Lake of the Woods District Property Owners Association, or LOWDPOA** is a vibrant membership-driven organization focused on the sustainability of "lake life" in the region. With more than 4,000 members, LOWDPOA is one of the largest associations of its kind in the province of Ontario. Membership includes not only part time and permanent residents within the Lake of the Woods District, but also those who simply have a keen interest in protecting this beautiful area for generations to come. LOWDPOA is active in programs ranging from: environment related initiatives, economic development in the region, member education & communication and fair taxation for waterfront property owners.

**The Lake of the Woods Arts Community, or LOWAC**, was formed by a group of artists and those with interest in the arts. The vision of the group is to inspire unity, joy and opportunity through the arts in Kenora and the surrounding area. LOWAC brings together artists of all disciplines including those involved with music, visual art, performing arts and writing. The community is striving to meet the needs of all arts and artists in the area.

**The Kenora Hospitality Alliance** is a unified organization with committed leadership pledged to promote, protect, and serve the interests of the Hospitality and Tourism Industry. The KHA is made up of 8 Hotel/Motel/B&B properties. Each property is unique in the amenities and facilities that they have to offer each guest. They range from economy lodging to 5 star lodging.



## Transportation Infrastructure

Kenora is located along the Trans Canada Highway, Canada’s main east-west highway corridor. Highway 71 offers south-bound access to the US border. The region offers access to both CP and CN Rail lines. The CP main line runs through Kenora and CN national main line has a switching yard 30 km from Kenora. The Kenora Airport offers 24hr/7 day service. A single well-maintained runway is 5,800ft in length, capable of landing a 737 size aircraft. Three Canada-US border crossings are located within 300 km of Kenora: Fort Frances, ON-International Falls, MN; Rainy River, ON-Baudette MN; and Thunder Bay, ON-Grand Portage, MN.

Table 10 Regional Border Crossings

| Border Crossing                            | Distance from Kenora |
|--|----------------------|
| Fort Frances, ON / International Falls, MN | 215 Km               |
| Rainy River, ON / Baudette, MN             | 230 Km               |
| Thunder Bay, ON / Grand Portage, MN        | 480 Km               |

Table 11 Travel Distances to Selected Cities

| City                        | Kilometres | Miles |
|-----------------------------|------------|-------|
| Dryden, Ontario             | 120        | 75    |
| Winnipeg, Manitoba          | 209        | 130   |
| Brandon, Manitoba           | 432        | 268   |
| Duluth, Minnesota           | 476        | 296   |
| Thunder Bay, Ontario        | 489        | 304   |
| Minneapolis, Minnesota      | 689        | 428   |
| Regina, Saskatchewan        | 791        | 492   |
| Saskatoon, Saskatchewan     | 1,000      | 621   |
| Edmonton, Alberta           | 1,524      | 947   |
| Calgary, Alberta            | 1,546      | 961   |
| Toronto, Ontario            | 1,853      | 1,151 |
| Vancouver, British Columbia | 2,511      | 1,560 |

Source: Google Maps



## The Kenora Airport (YQK)

Over 3,000 travelers per year arrive at the Kenora Airport on commercial flights operated by Bearskin Airlines. It is the only airport in the region offering international customs service for freight and passengers. The airport offers a 6,000ft runway, capable of handling a one seat aircraft or a 737 and full services ranging from fuel to catering. With hundreds of acres of available land in the Jones Road/Airport Corridor, featuring a mix of privately and municipally owned properties, there are almost limitless possibilities for new development. Airport Road is serviced for municipal sewer and water, natural gas, industrial electric power, and telecommunications infrastructure. All sites are within 2 km of the Trans Canada Highway. The CP Railway main line traverses Jones Road.

Table 12 Kenora Airport Arrivals Departures and Commercial Passenger Traffic

|                             | Canadian Arrivals | US Arrivals | Departures | Passenger Traffic (Commercial Flights Only) |
|-----------------------------|-------------------|-------------|------------|---|
| July 1 2011 to June 30 2012 | 5,673             | 343         | 6,016      | 3,140                                       |
| July 1 2010 to June 30 2011 | 4,988             | 343         | 5,331      | 3,061                                       |
| July 1 2009 to June 30 2010 | 5,251             | 315         | 5,566      | 3,006                                       |
| July 1 2008 to June 30 2009 | 5,506             | 308         | 5,814      | 3,409                                       |

Source: Kenora Airport Authority

Bearskin Airlines is a regional based airline serving the following scheduled areas:

### Major Markets

- North Bay, Sudbury
- Thunder Bay
- Sault Ste Marie
- Winnipeg

### Regional Markets

- Dryden
- Fort Frances
- Kenora
- Timmins
- Red Lake
- Sioux Lookout

Table 13 Bearskin Airlines Total Flights By Year

|       | 2010/11 | 2011/12 | 2012/13 | 2013/14 | 2014/15 | 2015/16 | 2016/17 |
|-------|---------|---------|---------|---------|---------|---------|---------|
| Total | 3,061   | 3,061   | 3,027   | 2,869   | 2,439   | 1,997   | 2,071   |

Source: Kenora Airport Authority



## Industrial Parks

The City of Kenora has industrial sites available for development at the **Kenora Airport Industrial Park**. The Kenora airport site offers direct access to the IFR rated Kenora Municipal Airport. It also features full services. The 60-acre park offers fast access to either air or ground transportation and is located 1 kilometre from the Canadian Pacific Railway mainline. Sites are available for lease only. Sites range in size from 1.7 acres to 10.9 acres.

Figure 9 Airport Industrial Park



Airport sites available for lease only.



## DETAILED VISITOR PROFILE

Kenora's visitor market is comprised of two main categories of seasonal visitors or residents:

1. **The Cottager Market**, which is comprised primarily of part-time residents to reside in the region on a seasonal basis, and
2. **The Visitor Market**, which includes pleasure travelers, business and convention travelers, and others passing through the region.

Both visitor markets come to Kenora to experience outdoor recreation, in particular fishing, boating, swimming, nature parks, and other outdoor recreation and sports activities.

### The Cottager Market

The Lake of the Woods is a summertime private recreation destination for cottagers who have been coming to the region for over a century to enjoy the Lake of the Woods and other smaller lakes and rivers in the area. According to the 2016 Census of Canada, there are approximately 901 dwellings<sup>11</sup> in the City of Kenora and approximately 7,260 dwellings in the Kenora District that are seasonal or not occupied by regular residents. While the exact number of cottages on the Lake of the Woods is not directly tracked statistically, there are over 4,000 members of the Lake of the Woods District Property Owners Association (LOWDPOA) who spend time at their cottages in the area. According to the 2003 Survey of Cottage Owners, LOWDPOA members spend over \$85 million in the area, and 79% of their shopping is done in the City of Kenora.

Table 14 Kenora Visitor Centre Traffic 2013-2016

| Visitor Centre Traffic             | 2013   | 2014   | 2015   | 2016   |
|------------------------------------|--------|--------|--------|--------|
| Lake of the Woods Discovery Centre | 14,913 | 14,915 | 16,794 | 16,597 |
| Thistle Pavilion                   | 8,548  | 8,503  | 8,723  | 8,664  |
| Total                              | 23,461 | 23,418 | 25,517 | 25,261 |

Source: Lake of the Woods Visitors Centre.

Table 15 Visitor Statistics RTO13c, 2014

| Visits                           | Total 2014         |                 |
|----------------------------------|--------------------|-----------------|
| Total Household/Party Visits     | 1,346,500          |                 |
| Total Person-Visits              | 2,054,600          |                 |
| Overnight Visits                 | 1,322,700          |                 |
| Same-Day Visits                  | 731,900            |                 |
| Activities                       | Number of Visitors | Share of Visits |
| Any Outdoor/Sports Activity      | 850,200            | 37%             |
| Fishing                          | 465,900            | 20%             |
| Boating                          | 406,900            | 18%             |
| Golfing                          | 27,000             | 1%              |
| Hunting                          | 40,200             | 2%              |
| Downhill Skiing/Snowboarding     | 38,400             | 2%              |
| National/Provincial Nature Parks | 139,900            | 6%              |
| Historic Sites                   | 90,800             | 4%              |
| Festivals/Fairs                  | 44,400             | 2%              |
| Cultural Performances            | 31,300             | 1%              |
| Museums/Art Galleries            | 72,500             | 3%              |
| Zoos/Aquariums/Botanical Gardens | 19,000             | 1%              |
| Sports Events                    | 55,800             | 2%              |
| Casinos                          | 22,700             | 1%              |
| Theme Parks                      | 10,600             | 1%              |

Source: Ontario Ministry of Tourism, Culture, and Sport, 2014

<sup>11</sup> Figure refers to all functioning dwellings that are unoccupied by year-round residents.



Table 16 Cottages and Part-Time Residents 2016, Kenora District and City of Kenora

| Usual Residents and Part-Time Cottage Residents             | Kenora District | Kenora City |
|---|-----------------|-------------|
| <b>Year-Round Residents (Cottagers and Other Residents)</b> |                 |             |
| Total Population of Usual Residents (Year-Round)            | 65,533          | 15,096      |
| Dwellings Occupied by Usual (Year-Round) Residents          | 23,931          | 6,475       |
| <b>Part-Time Cottage Market (Estimate)</b>                  |                 |             |
| Estimated Seasonal Residents                                | 19,602          | 2,433       |
| Estimated Dwellings Occupied by Seasonal Residents          | 7,260           | 901         |

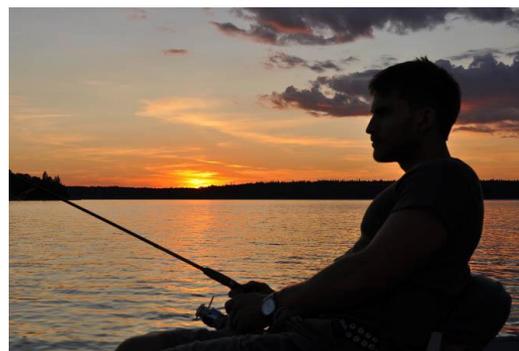
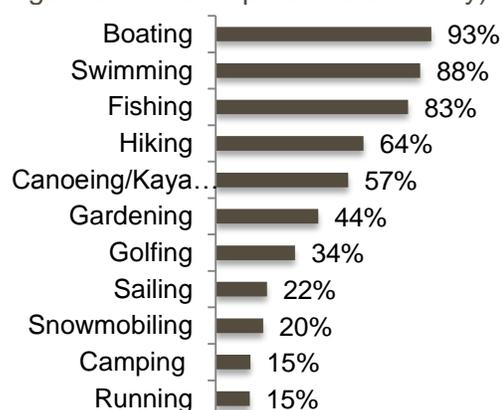
Source: Census 2016, Community Profiles. Estimates of Cottages based on total habitable dwellings not occupied by usual (year-round) residents. Estimate of cottage residents based on average residents per dwelling.

Table 17 Key Stats: Cottager Characteristics for LOWDPOA Members (2003)

| Indicator  | Key Stat     |
|--|--------------|
| LOWDPOA Membership   | Over 4,000   |
| Annual Spending (2003)   | \$85 million |
| Average Cottage Size   | 1,500 sq ft  |
| Average Cottage Market Value (2003)  | \$200,000    |
| Maximum Cottage Market Value (2003)  | \$2 million  |
| Average Number of Days Per Year Spent at the Cottage (Part-Time Residents)                   | 79 days      |
| Cottage Owners Who are Full-Time Residents   | 9%           |
| Cottage Owners Who are Part-Time Summer Residents  | 38%          |
| Cottage Owners Who are Part-Time Winter Residents  | 91%          |
| Cottage owners who plan to make their cottage their permanent residence in the next 10 years | 16%          |

Source: LOWDPOA Survey 2003

Figure 10 How Cottagers Spend Their Time: Recreation Activities (% of Cottagers Who Participate in the Activity)





## Visitor Trends

**Kenora’s regional visitor market has significant room to grow.** While the Kenora District enjoyed 723,000 person-visits in 2008, the regional population in Northwestern Ontario, Manitoba, and Minnesota totals over 7 million residents and the extended market area, including Ontario, North Dakota, South Dakota, Iowa, Wisconsin and Illinois includes over 36 million residents.

### Manitoba Visitor Trends

**According to the Travel Motivation Survey (2008), 73% of adult, Manitoba residents (618,000 individuals) have taken an out-of-province, overnight trip** in the most recent two years. Overall, 92.5% of pleasure travelers report taking at least one pleasure trip outside of the province, and Manitoba pleasure travelers are the most likely market in Canada to take pleasure trips outside of their province (76.7% of out-of-province Manitoba pleasure travelers took an out-of-province trip to an adjacent province).

**Following the 2007-2008 global financial crisis, trends in visitors to Kenora have shifted,** with Manitoba visitors representing a larger component of visitor demand. Most tourism business owners in Kenora report that much of the growth in tourism is coming from Manitoba, where population has grown by 9.5% between 2002 and 2012,<sup>12</sup> driven by a combination of growing families and a successful provincial immigration policy. The Manitoba population is expected to experience even higher growth in the future and official projections anticipate that Manitoba’s population will grow from 1,267,000 in 2012 to a population of between 1,338,700 and 1,451,600 by 2022, an increase of 11% to 15% over the next decade.<sup>13</sup>

**Visitors to Winnipeg** represent an additional potential growth market for Kenora as well, especially among visitors seeking an authentic and natural Canadian outdoor experience. Winnipeg hosted over 3.6 million visitors in 2011 and person-visits to Winnipeg have increased by 56% between 2006 and 2011. Expenditures by Winnipeg visitors increased by 48% in the same period, to over \$771 million and over 26% of

Table 18 Regional Visitor Market Population 2016

| Regional Visitor Markets              | Population        |
|---------------------------------------|-------------------|
| <b>Primary Visitor Market Region</b>  | <b>7,030,008</b>  |
| Manitoba                              | 1,278,365         |
| Minnesota                             | 5,519,952         |
| Northwestern Ontario                  | 231,691           |
| <b>Extended Visitor Market Region</b> | <b>36,479,821</b> |
| North Dakota                          | 757,952           |
| South Dakota                          | 865,454           |
| Iowa                                  | 3,134,693         |
| Wisconsin                             | 5,778,708         |
| Illinois                              | 12,801,539        |
| Other Ontario                         | 13,216,803        |
| <b>Total</b>                          | <b>36,555,149</b> |

Sources: US Census Bureau, Statistics Canada

<sup>12</sup> See CANSIM Table 051-0001 Estimates of population, by age group and sex for July 1, Canada, provinces and territories

<sup>13</sup> See CANSIM Table 052-0005 Projected population, by projection scenario, sex and age group as of July 1, Canada, provinces and territories



visitors to Winnipeg are individuals who reside outside of Manitoba,<sup>14</sup> many of whom are visiting friends and relatives (VFR Travelers) on recreational holidays.

The opening of the Canadian Museum for Human Rights (CMHR) in Winnipeg in 2014 will strengthen the city's national and international tourism attraction, creating additional opportunities for Kenora to offer a trip extension to CMHR visitors. The CMHR anticipates 250,000 individuals a year will visit the museum, which is envisioned to be a national and international destination, a centre of learning where Canadians and people from around the world can reflect and be inspired about human rights.

Table 19 Winnipeg Visitors and Visitor Spending 2006-2011

|   | 2006    | 2007    | 2008    | 2009    | 2010    | 2011    | Growth 2006-2011 |
|---|---------|---------|---------|---------|---------|---------|------------------|
| Person Visits ('000)                        | 2,354   | 2,512   | 2,361   | 2,424   | 2,757   | 3,678   | 56%              |
| Reallocated expenditures (thousand dollars) | 521,715 | 604,942 | 557,969 | 546,243 | 626,386 | 771,323 | 48%              |
| Visit-nights ('000)                         | 2,599   | 3,748   | 2,429   | 2,939   | 2,749   | 3,223   | 24%              |

Source: Statistics Canada, CANSIM Tables 426-0018, 426-0013

## Visitor Potential from the US

While travel from US visitors is down from historical highs, Northwestern Ontario (RTO13c) experienced 476,400 person visits in 2014 from US visitors. Pleasure trips account for 60% of all person-visits to RTO13c and they are the motivation for 51% of all US Travel to Ontario.<sup>15</sup> Recreational sports and other forms of active recreation offered in Kenora and at Lake of the Woods are the top most desired tourism product categories for two of Ontario's US traveler market segments:

- (1) **High Flyers:** Middle aged (35-59) families and empty nesters with household income over \$150,000, which represent 13.45% of households in Ontario's top tier visitor states, or 6.54 million potential travelers, and
- (2) **Footloose Families:** Younger middle aged (35-54) families with household incomes of \$50,000 to \$100,000, which represent 6.3% of households of selected states or 3.06 million potential travelers).

US travelers in the Young & Restless segment (4.79 million potential visitors who are younger (25-44) singles with no kids), and in the Silver Streaks segment (4.29 million potential visitors who are Mature (age 50+) empty nesters) also express strong interest in

Table 20 US Visitors to Ontario and Residents Open to Visiting, Selected States

| US State     | Current Visitors (2006) | Open to Visiting |
|--------------|-------------------------|------------------|
| Minnesota    | 337,000                 | 141,000          |
| North Dakota | 36,000                  | 18,000           |
| South Dakota | 24,000                  | 14,000           |
| Iowa         | 144,000                 | 70,000           |
| Wisconsin    | 334,000                 | 144,000          |
| Illinois     | 675,000                 | 556,000          |
| <b>Total</b> | <b>1,550,000</b>        | <b>943,000</b>   |

Source: TAMS 2006; Ontario Tourism Market Assessment 2009 (TNS)

<sup>14</sup> Source: Winnipeg Visitor Profile

<sup>15</sup> See [http://www.mtc.gov.on.ca/en/publications/Ontario\\_Tourism\\_Market\\_Assessment.pdf](http://www.mtc.gov.on.ca/en/publications/Ontario_Tourism_Market_Assessment.pdf)



activities such as golf, swimming, sightseeing, going to farmer’s markets, free outdoor performances, skiing, camping, hiking, canoeing, and attending festivals and visiting art galleries, all of which are represented in Kenora’s tourism product. (For more information on Ontario’s Visitor Market Segments, see Ontario Tourism Product Assessment 2009).<sup>16</sup>

Table 21 Kenora Opportunities that Align with Ontario's Competitive Soft Adventure and Cultural Tourism Product

| Niche Product   | Description  | Forecast   | Top Kenora Opportunities  |
|---|--|--|---|
| Soft Adventure Tourism                                    | Tourism which requires little or no experience and is low risk. Typical adventurers are in their 40s, affluent and well-educated. U.S., Canada, and Mexico are competing destinations. | Annual growth of 10% over next decade, led by 40-60 year olds.   | <ul style="list-style-type: none"> <li>▪ Public-Private Partnerships: Coney Island &amp; Anishinabe Park</li> <li>▪ RV and “glamping” development</li> <li>▪ Docks, marinas and boating services</li> <li>▪ Fishing and Hunting Guides</li> <li>▪ Fishing lodge or resort development</li> <li>▪ Cottage and vacation home rentals</li> </ul> |
| Meetings, incentives, conferences, and exhibitions (MICE) | Business travel for meetings, incentives, conventions, and exhibitions (MICE). Tourists are often middle-aged males, who may be traveling with family.                                 | Continued moderate growth, partially dependent upon prevailing economic circumstances.   | <ul style="list-style-type: none"> <li>▪ High end hotel, potentially linked with Kenora Events Centre</li> <li>▪ Shopping and dining in Harbortown Centre or Keewatin District</li> </ul>   |
| Ecotourism  | Responsible travel to natural areas that conserves the environment and improves the welfare of local people  | Expected growth of approximately 6% per year.  | <ul style="list-style-type: none"> <li>▪ Camps along the Pathway of the Paddle</li> </ul>   |
| Festival Tourism  | Travel for the main purpose of attending cultural and / or music festivals. Perceived as one of the most authentic ways of being immersed in local culture.                            | Interest in international cultural events is increasing.   | <ul style="list-style-type: none"> <li>▪ Culinary development for smoked meats and local seafood sourced in the area.</li> </ul>  |
| Cultural Tourism  | Tourism including cultural activities, experiences, and interaction with local people. Typical travelers include baby boomers and empty nesters.                                       | Continued growth led by those aged 55 and above. Cultural tourism motivations are shifting towards a more general interest in culture. | <ul style="list-style-type: none"> <li>▪ Development of unique itineraries,</li> <li>▪ Tunnel island cultural experience development</li> </ul>   |

Source: Ontario Tourism Product Assessment 2009, Lake of the Woods Development Commission

<sup>16</sup> See [http://www.mtc.gov.on.ca/en/publications/Ontario\\_Tourism\\_Product\\_Assessment.pdf](http://www.mtc.gov.on.ca/en/publications/Ontario_Tourism_Product_Assessment.pdf)



## APPENDIX A: INCENTIVES AND GOVERNMENT SUPPORT

### Support Programs Available to Ontario Businesses "Best Fit" Programs for Kenora Tourism Sector Businesses

#### Workforce and Training

**Employer Signing Bonus-** You may qualify for a \$2,000 signing bonus if you register a new apprentice in a sector where there is high demand for skilled workers.  
[http://www.tcu.gov.on.ca/eng/employers/emp\\_bonus.html](http://www.tcu.gov.on.ca/eng/employers/emp_bonus.html)

**Northern Ontario Internship Program-** Through this program, young northerners will have access to work placements and internships that will serve as a springboard to rewarding and successful careers. By investing in our highly skilled young workforce, Northern Ontario employers prepare them for future employment right here in the North.  
<http://nohfc.ca/en/programs/northern-ontario-internship-program>

**Youth Job Connection and Youth Job Connection Summer-** Provides financial incentives for hiring a young person (15 to 29 years old) through Youth Job Connection and a high school student (15 to 18 years old) through Youth Job Connection Summer. Funding is based on the amount of money an employer needs to hire and train a new youth employee  
<https://www.ontario.ca/page/hire-young-person>

**Rural Economic Development (RED) Program-** Helps rural communities to better position themselves to attract investment, create jobs, enhance economic growth and make everyday life easier for rural Ontario.  
<http://www.omafra.gov.on.ca/english/rural/ruralfunding/index.html>

#### Infrastructure

**Strategic Economic Infrastructure Program-** Modern and reliable infrastructure is a cornerstone of building thriving, prosperous communities everywhere. The NOHFC Infrastructure and Community Development Program helps northern communities make the investments necessary to improve critical infrastructure and develop partnerships that find effective ways to create jobs and improve economic prospects in the North.  
<http://nohfc.ca/en/programs/strategic-economic-infrastructure-program>

#### Entrepreneur Resources

**Business Advisory Services-** Business advisors in 12 regional offices assist small and medium-sized businesses in Ontario to grow and expand their business. Advisors have expertise in business planning, finance, exporting and access to a network of people and resources to enhance competitiveness and profitability.  
<https://canadabusiness.ca/programs/business-advisory-services-ontario-1/>



**Gasoline used in Unlicensed Business Equipment-** Do you or your business buy gasoline for unlicensed equipment, such as equipment for farming, construction or manufacturing? If yes, you may get a refund of the tax you have paid. <http://www.fin.gov.on.ca/en/refund/gasunlicensed/index.html>

**Northern Business Opportunity Program – Small Business Start-up Projects-** New businesses that intend to commence operations are eligible to receive financial assistance in the form of a conditional contribution and will generally not exceed 50% of eligible project costs up to a maximum of \$200,000. <http://nohfc.ca/en/programs/northern-business-opportunity-program-small-business-start-projects>

**Northern Business Opportunity Program – Business Expansion Projects-** Existing businesses in Ontario that intend to expand and/or retain their operations within Northern Ontario to improve competitiveness, grow revenues and create jobs. NOHFC assistance will generally not exceed 50% of eligible projects costs up to a maximum of \$1 million per project. <http://nohfc.ca/en/programs/northern-business-opportunity-program-business-expansion-projects>

**Ontario Low Carbon Innovation Fund-** You may qualify for a grant of up to \$2 million to help commercialize your innovative green technologies, processes and/or products in Ontario. <https://www.ontario.ca/page/low-carbon-innovation-fund>

## **Tax & Financial Incentives**

**Apprenticeship Training Tax Credit-** You may qualify for an annual tax credit of up to \$10,000 per qualifying apprentice to a maximum of \$40,000 over a 48 month period. <http://www.fin.gov.on.ca/en/credit/attc/index.html>

## APPENDIX B: KENORA VISITOR CENTRE STATISTICS

Table 22 Origin of Visitors to Lake of the Woods Visitors Centre, 2012

| Area           | Visitors     | Percentage of Visitors |
|----------------|--------------|------------------------|
| Ontario        | 980          | 18%                    |
| Kenora         | 617          | 11%                    |
| Other Ontario  | 363          | 7%                     |
| Manitoba       | 2,539        | 46%                    |
| U.S.A          | 578          | 10%                    |
| Overseas       | 214          | 4%                     |
| Unknown Origin | 1,207        | 22%                    |
| From West      | 877          | 16%                    |
| From East      | 330          | 6%                     |
| <b>Total</b>   | <b>5,518</b> | <b>100%</b>            |

Table 23 Monthly Visitors to Lake of the Woods Visitors Centre and Thistle Pavilion 2013-2016

| Year      | Centre           | Jan        | Feb        | Mar        | Apr        | May          | Jun          | July         | Aug          | Sep          | Oct        | Nov        | Dec        | Total         |
|-----------|------------------|------------|------------|------------|------------|--------------|--------------|--------------|--------------|--------------|------------|------------|------------|---------------|
| 2013      | Tourism Centre   | 117        | 124        | 123        | 349        | 766          | 2,172        | 4,318        | 4,370        | 1,837        | 449        | 182        | 106        | 14,913        |
|           | Pavillion        |            |            |            |            | 93           | 1,174        | 3,623        | 3,658        |              |            |            |            | 8,548         |
|           | <b>Total</b>     | <b>117</b> | <b>124</b> | <b>123</b> | <b>349</b> | <b>859</b>   | <b>3,346</b> | <b>7,941</b> | <b>8,028</b> | <b>1,837</b> | <b>449</b> | <b>182</b> | <b>106</b> | <b>23,461</b> |
| 2014      | Tourism Centre   | 112        | 158        | 191        | 324        | 1,056        | 2,309        | 4,448        | 4,361        | 1,167        | 484        | 163        | 142        | 14,915        |
|           | Pavillion        |            |            |            |            |              | 780          | 3,705        | 4,018        |              |            |            |            | 8,503         |
|           | <b>Total</b>     | <b>112</b> | <b>158</b> | <b>191</b> | <b>324</b> | <b>1,056</b> | <b>3,089</b> | <b>8,153</b> | <b>8,379</b> | <b>1,167</b> | <b>484</b> | <b>163</b> | <b>142</b> | <b>23,418</b> |
| 2015      | Tourism Centre   | 122        | 185        | 238        | 421        | 1,098        | 2,740        | 4,723        | 4,636        | 1,537        | 620        | 281        | 193        | 16,794        |
|           | Pavillion        |            |            |            |            |              | 933          | 3,723        | 4,067        |              |            |            |            | 8,723         |
|           | <b>Total</b>     | <b>122</b> | <b>185</b> | <b>238</b> | <b>421</b> | <b>1,098</b> | <b>3,673</b> | <b>8,446</b> | <b>8,703</b> | <b>1,537</b> | <b>620</b> | <b>281</b> | <b>193</b> | <b>25,517</b> |
| 2016      | Tourism Centre   | 175        | 178        | 307        | 450        | 1,272        | 2,204        | 4,918        | 3,826        | 1,434        | 667        | 370        | 796        | 16,597        |
|           | Pavillion        |            |            |            |            |              | 1,190        | 4,166        | 3,308        |              |            |            |            | 8,664         |
|           | <b>Total</b>     | <b>175</b> | <b>178</b> | <b>307</b> | <b>450</b> | <b>1,272</b> | <b>3,394</b> | <b>9,084</b> | <b>7,134</b> | <b>1,434</b> | <b>667</b> | <b>370</b> | <b>796</b> | <b>25,261</b> |
| 2013-2016 | Percent Increase | 50%        | 44%        | 150%       | 29%        | 48%          | 1%           | 14%          | -11%         | -22%         | 49%        | 103%       | 650%       | 8%            |

## APPENDIX C: KENORA RECREATION CENTRE STATISTICS

Table 24 Kenora Recreational Participant Visits Activity

| Activity       | 2014           | 2015           |
|----------------|----------------|----------------|
| Fitness Centre | 45,164         | 53,184         |
| Walking Track  | 12,606         | 10,841         |
| Group Fitness  | 7,343          | 6,538          |
| Open Ice       | 1,706          | 2,713          |
| Pool           | 87,618         | 89,770         |
| KSS            | 7,968          | 5,348          |
| Lane Swim      | 7,924          | 8,262          |
| Tot Swim       | 4,173          | 4,932          |
| WaterFit       | 5,503          | 5,206          |
| GentleFit      | 1,914          | 2,132          |
| Schools        | 13,546         | 15,888         |
| Public Swim    | 21,586         | 19,836         |
| Rentals        | 3,856          | 3,273          |
| Swim Lessons   | 4,283          | 4,092          |
| Adult Lessons  | 283            | 321            |
| LSS Programs   | 971            | 530            |
| Spec. Olympics | 326            | 370            |
| Other          | 1,014          | 1,571          |
| Hot Tub        | 13,514         | 16,187         |
| <b>Total</b>   | <b>154,437</b> | <b>163,046</b> |

Source: Kenora Rec Centre Annual Statistics

Table 25 Kenora Recreational Facility Rental Hours 2015

| Venue                    | Hours         |
|--------------------------|---------------|
| Rec Centre Meeting Rooms | 4,792         |
| Thistle Rink             | 2,921         |
| Keewatin Memorial Arena  | 1,868         |
| Municipal Ball Fields    | 2,011         |
| <b>Total</b>             | <b>11,592</b> |

Table 26 Recreation Events 2015

| Programs   |
|--|
| <ul style="list-style-type: none"> <li>L.O.W. Girls Minor Hockey (Bantam/Midget)</li> <li>'AA' Bantam</li> <li>L.O.W. Girls Minor Hockey (Rep Tournament, Atom/Peewee/Bantam)</li> <li>Sunset Regional Inner Club Figure Skating Competition</li> <li>Travelers Provincial Curling Championship</li> <li>Casey's Men's Tournament</li> <li>L.O.W. Boys Minor Hockey (PeeWee)</li> <li>L.O.W. Boys Minor Hockey (Bantam)</li> <li>L.O.W. Boys Minor Hockey (Atom)</li> <li>Ontario Provincial High School Girls Championship</li> <li>Ham n' Egger Men's</li> <li>3 on 3 Kids Fundraiser</li> <li>Alzheimer Awareness Information Booth</li> <li>North American First Nations Tournament</li> <li>Lake of the Woods Girls Hockey Annual Banquet</li> <li>Kenora District Chamber of Commerce Home and Leisure Show</li> <li>Lake of the Woods Minor Hockey Association Annual Banquet</li> <li>LOW Shrine Circus</li> <li>It's a Dog's life craft/yard/bake sale</li> <li>OPP Bike Rodeo</li> </ul> |

Recreation Events 2015 (Continued)

| Programs   |
|--|
| <ul style="list-style-type: none"> <li>Gun Show</li> <li>Kenora Agricultural Society – Agricultural Fair</li> <li>Staff Appreciation BBQ</li> <li>All Breed Championship Dog Show</li> <li>Safe Grad</li> <li>Re-New2 Transition Initiative: Shred Kelly Concert</li> <li>Jays Care/Right to Play</li> <li>Hockey Canada – Hall of Fame</li> <li>Transition Initiative Kenora</li> <li>Mass Registration – Whitecap Pavilion</li> <li>AA Atom Thistle Hockey</li> <li>Lake of the Woods Girls Hockey (Novice, Atom, Pee-Wee)</li> <li>AA PeeWee Hockey Club</li> <li>Girls High school Hockey</li> </ul> |

## APPENDIX D: MONTHLY OCCUPANCY, ADR, and RevPAR

Table 27 Monthly Occupancy, ADR, and RevPAR for Chain Hotels in Kenora, 12-month period April 2008-April 2013

| Month       | Jan   | Feb   | Mar   | Apr   | May   | Jun    | Jul    | Aug    | Sep    | Oct   | Nov   | Dec   |
|-------------|-------|-------|-------|-------|-------|--------|--------|--------|--------|-------|-------|-------|
| <b>2013</b> |       |       |       |       |       |        |        |        |        |       |       |       |
| Occupancy   | 40.4  | 52.1  | 43.9  | 57.3  |       |        |        |        |        |       |       |       |
| ADR         | 98.33 | 98.99 | 98.71 | 99.52 |       |        |        |        |        |       |       |       |
| RevPAR      | 39.73 | 51.53 | 43.31 | 57.07 |       |        |        |        |        |       |       |       |
| <b>2012</b> |       |       |       |       |       |        |        |        |        |       |       |       |
| Occupancy   | 47.2  | 51.1  | 46.5  | 59.7  | 68.5  | 80.9   | 91.1   | 88.7   | 71.8   | 59.4  | 50.5  | 38.8  |
| ADR         | 89.85 | 93.8  | 96.08 | 97.72 | 99.38 | 102.28 | 107.41 | 111.71 | 105.04 | 99.19 | 96.85 | 97.12 |
| RevPAR      | 42.43 | 47.91 | 44.65 | 58.38 | 68.1  | 82.77  | 97.83  | 99.12  | 75.45  | 58.94 | 48.88 | 37.64 |
| <b>2011</b> |       |       |       |       |       |        |        |        |        |       |       |       |
| Occupancy   | 45.7  | 54.3  | 52.9  | 60.9  | 64.4  | 75.7   | 92     | 91.8   | 74.8   | 61.2  | 54.1  | 37.2  |
| ADR         | 91.41 | 90.7  | 95.61 | 96.57 | 95.09 | 99.72  | 106.01 | 104.32 | 103.07 | 94.5  | 93.65 | 93.13 |
| RevPAR      | 41.81 | 49.25 | 50.53 | 58.81 | 61.23 | 75.47  | 97.55  | 95.78  | 77.11  | 57.8  | 50.62 | 34.61 |

Source: Smith Travel Research

## APPENDIX E: REGIONAL VISITOR ACTIVITY STATISTICS 2014

Figure 11 Detailed Visitor Statistics RTO13c, 2014

| Destination: RTO13c<br>Year: 2010           | Total     | Origin    |              |         |          | Length of Stay |          | Main Purpose of Trip |         |          |         |
|---|-----------|-----------|--------------|---------|----------|----------------|----------|----------------------|---------|----------|---------|
|   |           | Ontario   | Other Canada | US      | Overseas | Overnight      | Same-Day | Pleasure             | VFR     | Business | Other   |
| <b>Total Visits</b>                         |           |           |              |         |          |                |          |                      |         |          |         |
| Total Household/Party Visits                | 1,346,500 | 827,300   | 304,500      | 200,800 | 13,800   | 808,400        | 538,100  | 572,300              | 442,900 | 191,300  | 97,100  |
| Total Person Visits                         | 2,054,600 | 1,087,200 | 470,600      | 476,00  | 20,400   | 1,322,700      | 731,900  | 1,006,500            | 631,900 | 193,200  | 162,200 |
| <b>Length of Stay (Person Visits)</b>       |           |           |              |         |          |                |          |                      |         |          |         |
| Overnight                                   | 1,322,700 | 623,300   | 324,400      | 355,600 | 19,400   | 1,322,700      | -        | 667,300              | 461,100 | 83,900   | 89,500  |
| Same-Day                                    | 731,900   | 463,900   | 146,300      | 120,800 | 900      | -              | 731,900  | 339,200              | 170,800 | 109,300  | 72,700  |
| <b>Main Purpose of Trip (Person Visits)</b> |           |           |              |         |          |                |          |                      |         |          |         |
| Pleasure                                    | 1,006,500 | 337,500   | 312,700      | 347,500 | 8,800    | 667,300        | 339,200  | 1,006,500            |         |          |         |
| VFR   | 631,900   | 452,700   | 138,000      | 34,400  | 6,900    | 461,100        | 170,800  |                      | 631,900 |          |         |
| Shopping                                    | 47,400    | 47,400    |              |         |          | 7,400          | 39,900   |                      |         |          |         |
| Business                                    | 193,200   | 175,100   | 12,000       | 3,600   | 2,600    | 83,900         | 109,300  |                      |         | 193,200  |         |
| Conventions & Conferences                   | 57,500    | 54,500    | 3,00         |         |          | 49,400         | 86,400   |                      |         | 57,500   |         |
| Other Business                              | 135,700   | 120,600   | 9,000        | 3,600   | 2,600    | 49,400         | 86,400   |                      |         | 135,700  |         |
| Other Personal                              | 162,200   | 61,200    | 8,100        | 90,900  | 2,000    | 89,500         | 72,700   |                      |         |          | 162,200 |
| <b>Quarter Trip Started (Person Visits)</b> |           |           |              |         |          |                |          |                      |         |          |         |
| Q1 (Jan - Mar)                              | 348,200   | 265,700   | 41,200       | 38,600  | 2,800    | 194,700        | 153,500  | 73,800               | 161,900 | 61,300   | 31,000  |
| Q2 (Apr - Jun)                              | 430,300   | 188,000   | 98,200       | 135,100 | 9,000    | 297,700        | 132,700  | 239,400              | 110,700 | 33,700   | 41,800  |
| Q3 (Jul - Sep)                              | 934,000   | 434,400   | 234,500      | 257,200 | 7,900    | 658,600        | 275,400  | 551,100              | 232,700 | 60,800   | 60,200  |
| Q4 (Oct - Dec)                              | 342,000   | 199,100   | 96,700       | 45,500  | 700      | 171,700        | 170,300  | 142,100              | 126,600 | 37,400   | 29,200  |

| Accommodation Type (Person Visits) |         |         |        |         |        |         |  |         |        |        |        |
|------------------------------------|---------|---------|--------|---------|--------|---------|--|---------|--------|--------|--------|
| Roofed commercial                  | 425,600 | 162,200 | 48,300 | 204,000 | 11,100 | 425,600 |  | 243,300 | 54,900 | 65,100 | 46,200 |

| Destination: RTO13c<br>Year: 2010       | Total     | Origin    |                 |           |          | Length of Stay |          | Main Purpose of Trip |           |          |         |
|---|-----------|-----------|-----------------|-----------|----------|----------------|----------|----------------------|-----------|----------|---------|
|   |           | Ontario   | Other<br>Canada | US        | Overseas | Overnight      | Same-Day | Pleasure             | VFR       | Business | Other   |
| Hotels                                  | 186,300   | 118,400   | 29,100          | 31,700    | 7,100    | 186,300        |          | 68,500               | 38,200    | 49,500   | 15,100  |
| Motels                                  | 73,100    | 17,200    | 7,200           | 46,900    | 1,900    | 73,100         |          | 39,800               | 10,600    | 5,100    | 16,500  |
| Commercial cottage/cabins               | 170,900   | 10,600    | 11,500          | 146,600   | 2,100    | 170,900        |          | 147,300              | 7,200     | 200      | 16,100  |
| Other roofed commercial                 | 17,600    | 16,000    | 1,600           |           |          | 17,600         |          | 4,500                | 2,300     | 10,300   | 500     |
| Camping/RV facilities                   | 141,300   | 54,000    | 36,100          | 46,800    | 4,400    | 141,300        |          | 111,600              | 13,700    | 6,700    | 9,200   |
| Private homes/cottages                  | 692,300   | 393,900   | 233,600         | 61,400    | 3,400    | 692,300        |          | 265,800              | 386,800   | 10,600   | 24,200  |
| Private homes                           | 447,700   | 325,400   | 104,300         | 14,600    | 3,400    | 447,700        |          | 54,500               | 366,000   | 8,900    | 13,500  |
| Private cottages                        | 244,500   | 68,500    | 129,300         | 46,700    |          | 244,500        |          | 211,300              | 20,800    | 1,600    | 10,700  |
| Other accommodation type                | 87,300    | 14,600    | 12,900          | 58,500    | 1,400    | 87,300         |          | 61,000               | 10,500    | 1,500    | 14,300  |
| <b>Number of Nights (Person Visits)</b> |           |           |                 |           |          |                |          |                      |           |          |         |
| 0 nights                                | 731,900   | 463,900   | 146,300         | 120,800   | 900      |                | 731,900  | 339,200              | 170,800   | 109,300  | 72,700  |
| 1 night                                 | 339,800   | 234,600   | 59,500          | 40,900    | 4,700    | 339,800        |          | 110,500              | 177,000   | 26,000   | 23,500  |
| 2 nights                                | 339,000   | 184,200   | 117,400         | 36,100    | 1,300    | 339,000        |          | 157,400              | 119,600   | 30,000   | 18,000  |
| 3 nights                                | 192,100   | 67,900    | 75,400          | 44,800    | 4,100    | 192,100        |          | 123,200              | 50,700    | 9,000    | 5,000   |
| 4 nights                                | 103,400   | 38,800    | 13,500          | 48,600    | 2,500    | 103,400        |          | 57,300               | 28,700    | 5,800    | 11,700  |
| 5 nights                                | 83,500    | 37,000    | 14,700          | 30,500    | 1,400    | 83,500         |          | 45,700               | 26,700    | 7,300    | 3,900   |
| 6 - 9 nights                            | 202,800   | 31,300    | 29,700          | 139,400   | 2,500    | 202,800        |          | 156,400              | 19,000    | 5,200    | 22,200  |
| 10+ nights                              | 62,000    | 29,500    | 14,200          | 15,300    | 3,000    | 62,000         |          | 16,700               | 39,400    | 700      | 5,200   |
| <b>Number of Nights</b>                 |           |           |                 |           |          |                |          |                      |           |          |         |
| Total Nights                            | 4,874,500 | 1,825,500 | 1,029,400       | 1,905,900 | 113,700  | 4,874,500      |          | 2,579,000            | 1,549,100 | 216,600  | 486,300 |
| Average nights of total visits          | 2.37      | 1.68      | 2.19            | 4.00      | 5.59     | 3.69           |          | 2.56                 | 2.45      | 1.12     | 3.00    |
| Average nights of overnight visits      | 3.69      | 2.93      | 3.17            | 5.36      | 5.86     | 3.69           |          | 3.87                 | 3.36      | 2.58     | 5.43    |

| <b>Number of Nights by<br/>Accommodation Type</b> |           |         |         |           |        |           |  |           |         |         |         |
|---|-----------|---------|---------|-----------|--------|-----------|--|-----------|---------|---------|---------|
| Nights in roofed commercial                       | 1,627,500 | 374,700 | 125,100 | 1,073,900 | 53,800 | 1,627,500 |  | 1,019,700 | 140,200 | 159,900 | 273,900 |

| Destination: RTO13c<br>Year: 2010                  | Total     | Origin    |                 |         |          | Length of Stay |          | Main Purpose of Trip |           |          |         |
|--|-----------|-----------|-----------------|---------|----------|----------------|----------|----------------------|-----------|----------|---------|
|  |           | Ontario   | Other<br>Canada | US      | Overseas | Overnight      | Same-Day | Pleasure             | VFR       | Business | Other   |
| Nights in hotels                                   | 376,600   | 232,900   | 70,000          | 50,000  | 23,600   | 376,600        |          | 134,300              | 76,600    | 105,700  | 27,200  |
| Nights in motels                                   | 187,000   | 46,000    | 12,100          | 118,500 | 10,400   | 187,000        |          | 99,300               | 21,800    | 30,400   | 34,600  |
| Nights in commercial<br>cottage/cabins             | 1,013,000 | 51,500    | 36,200          | 905,500 | 19,800   | 1,013,000      |          | 763,400              | 37,300    | 700      | 211,600 |
| Nights in other roofed commercial                  | 50,900    | 44,200    | 6,700           |         |          | 50,900         |          | 22,800               | 4,400     | 23,200   | 500     |
| Nights in camping/RV facilities                    | 487,100   | 127,600   | 107,700         | 215,800 | 36,000   | 487,100        |          | 360,200              | 48,500    | 13,400   | 65,000  |
| Nights in private homes/cottages                   | 2,353,200 | 1,284,700 | 750,500         | 295,600 | 22,500   | 2,353,300      |          | 905,100              | 1,308,000 | 41,700   | 88,700  |
| Nights in private homes                            | 1,534,300 | 1,083,400 | 362,100         | 66,300  | 22,500   | 1,534,300      |          | 198,600              | 1,252,200 | 34,500   | 39,200  |
| Nights in private cottages                         | 819,000   | 201,300   | 388,400         | 229,300 |          | 819,000        |          | 706,500              | 55,800    | 7,200    | 49,400  |
| Nights in other                                    | 406,700   | 38,600    | 46,100          | 320,600 | 1,400    | 406,700        |          | 294,000              | 52,500    | 1,500    | 58,700  |
| <b>Activities Participated (Person<br/>Visits)</b> |           |           |                 |         |          |                |          |                      |           |          |         |
| Festivals/Fairs                                    | 44,400    | 18,100    | 10,400          | 10,600  | 5,300    | 41,100         | 3,300    | 34,400               | 8,400     | 1,100    |         |
| Cultural Performances                              | 31,300    | 13,700    | 8,700           | 5,400   | 3,500    | 30,600         | 700      | 16,900               | 10,400    | 4,000    |         |
| Museums/Art Galleries                              | 72,500    | 32,200    | 12,800          | 21,500  | 6,000    | 71,800         | 700      | 47,400               | 14,500    | 9,300    | 1,200   |
| Zoos/Aquariums/Botanical Gardens                   | 19,000    | 11,700    | 900             | 1,700   | 4,600    | 18,600         | 400      | 15,300               | 3,600     | 200      |         |
| Sports Events                                      | 55,800    | 45,600    | 6,900           | 1,700   | 1,500    | 53,100         | 2,700    | 27,400               | 14,400    | 8,900    | 1,200   |
| Casinos  | 22,700    | 17,900    | 2,100           | 100     | 2,600    | 21,000         | 1,800    | 7,100                | 13,000    | 700      |         |
| Theme Parks  | 10,600    | 6,500     | 3,200           |         | 800      | 10,600         |          | 3,300                | 3,000     |          |         |
| National/Provincial Nature Parks                   | 139,900   | 31,200    | 48,700          | 48,900  | 11,100   | 137,000        | 2,900    | 108,100              | 25,300    | 1,500    | 5,000   |
| Historic Sites                                     | 90,800    | 39,200    | 13,200          | 29,900  | 8,600    | 90,100         | 700      | 52,800               | 24,800    | 10,400   | 2,800   |
| Any Outdoor/Sports Activity                        | 850,200   | 319,100   | 251,700         | 264,300 | 15,100   | 714,500        | 135,700  | 641,300              | 143,500   | 15,800   | 41,500  |
| Boating  | 406,900   | 84,500    | 165,700         | 152,300 | 4,500    | 386,000        | 20,800   | 327,300              | 50,700    | 3,400    | 21,300  |
| Golfing  | 27,00     | 6,300     | 10,400          | 10,000  | 200      | 24,900         | 2,100    | 17,000               | 5,000     |          | 700     |
| Fishing  | 465,900   | 112,500   | 119,600         | 233,100 | 800      | 407,100        | 58,900   | 383,200              | 46,400    | 1,700    | 34,600  |
| Hunting  | 40,200    | 32,100    | 3,300           | 4,600   | 200      | 36,800         | 3,500    | 25,300               | 13,700    |          | 1,200   |
| Downhill Skiing/Snowboarding                       | 38,400    | 29,600    | 6,600           | 200     | 2,000    | 32,600         | 5,800    | 9,800                | 19,500    | 6,700    | 2,300   |
| <b>Household/Party Size and<br/>Composition</b>    |           |           |                 |         |          |                |          |                      |           |          |         |

| Destination: RTO13c<br>Year: 2010         | Total     | Origin  |                 |         |          | Length of Stay |          | Main Purpose of Trip |         |          |        |
|---|-----------|---------|-----------------|---------|----------|----------------|----------|----------------------|---------|----------|--------|
|   |           | Ontario | Other<br>Canada | US      | Overseas | Overnight      | Same-Day | Pleasure             | VFR     | Business | Other  |
| Total household/party visits              | 1,346,500 | 827,300 | 304,500         | 200,800 | 13,800   | 808,400        | 538,100  | 527,300              | 442,900 | 191,300  | 97,100 |
| 1 person (Party Visits)                   | 257,200   | 161,200 | 31,300          | 56,200  | 8,400    | 144,600        | 112,600  | 58,900               | 121,400 | 56,100   |        |
| 2 persons (Party Visits)                  | 255,300   | 113,100 | 55,100          | 82,300  | 4,900    | 154,600        | 100,700  | 156,700              | 52,000  | 7,500    | 32,000 |
| 3 or more persons (Party Visits)          | 834,000   | 553,000 | 218,100         | 62,300  | 500      | 509,200        | 324,700  | 356,700              | 269,400 | 127,700  | 49,000 |
| Average party size                        | 2.74      | 2.97    | 2.48            | 2.66    | 1.56     | 1.75           | 1.51     | 1.26                 | 1.80    | 4.02     | 2.71   |
| Party with adult(s) only (%)              | 87%       | 89%     | 83%             | 89%     | 96%      | 86%            | 89%      | 86%                  | 85%     | 98%      | 94%    |
| Party with children (%)                   | 13%       | 11%     | 17%             | 11%     | 4%       | 14%            | 11%      | 14%                  | 15%     | 2%       | 6%     |
| <b>Age of Respondents (Person Visits)</b> |           |         |                 |         |          |                |          |                      |         |          |        |
| Under 15 years                            | 30,800    |         |                 | 29,900  | 900      | 22,900         | 7,900    | 26,900               | 1,800   |          | 2,100  |
| 15 - 24 years old                         | 173,300   | 113,800 | 46,200          | 11,400  | 1,900    | 131,700        | 41,600   | 45,200               | 105,700 | 11,800   | 2,700  |
| 25 - 34 years old                         | 321,300   | 226,500 | 70,200          | 20,800  | 3,900    | 237,100        | 84,300   | 94,400               | 153,300 | 33,500   | 11,200 |
| 35 - 44 years old                         | 278,400   | 169,600 | 69,800          | 38,600  | 300      | 163,900        | 114,400  | 146,300              | 65,800  | 44,600   | 15,900 |
| 45 - 54 years old                         | 472,100   | 254,300 | 136,100         | 77,600  | 4,100    | 264,500        | 207,600  | 249,300              | 130,100 | 52,800   | 35,900 |
| 55 - 64 years old                         | 427,800   | 218,000 | 78,900          | 127,900 | 3,100    | 270,100        | 157,700  | 239,900              | 104,600 | 42,100   | 29,500 |
| 65+ years old                             | 323,400   | 105,000 | 69,300          | 145,300 | 3,800    | 220,100        | 103,300  | 191,500              | 66,400  | 8,300    | 54,700 |
| Age not stated                            | 27,500    |         |                 | 25,000  | 2,500    | 12,400         | 15,100   | 13,000               | 4,200   |          | 10,200 |

Source: Ontario Ministry of Tourism, Culture and Sport. Analysis based on Statistics Canada Microdata which contain anonymised data collected in the Travel Survey of Residents of Canada and the International Travel Survey.