



FORT FRANCES SPORT FISHING CENTRE

Phase I Project Scoping Final Report

January, 2002

HILDERMAN
THOMAS
FRANK
CRAM



Landscape Architecture • Planning
500-115 Bannatyne Avenue East, Winnipeg, Manitoba R3B-0R3
Telephone 204•944•9907 Fax 204•957•1467

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The Great CANADIAN FRESHWATER SPORT FISHING CENTRE

Fort Frances, Ontario

January, 2002

Phase I Project Scoping Final Report Executive Summary

Canada in general, and Sunset Country in particular possess attributes for freshwater fishing that are not available in the continental United States, the Americas and most other regions of the world: the wilderness of the boreal forest, its rocks, trees, wildlife, smell and sounds; cold waters; big fish that are safe to eat; lots of fish; the climate; public lands in remote and roadless areas; and uncrowded lakes. These collectively provide outdoor experiences that are uniquely Canadian.

The Great Canadian Freshwater Sport Fishing Centre would be the place to celebrate these attributes and to promote sustainable sport fishing in Canada. Fort Frances is one of the major entry points for anglers into Canada and is located adjacent to the heartland of American sport fishing. It is already viewed as a major gateway for visitors from the Midwestern United States to Sunset Country. The development of a Sport Fishing Centre would permit Fort Frances to brand itself as the gateway to "The Canadian Sport Fishing Experience". As a gateway, the community can develop its reputation as the place where people can find out about this experience, the place where people can get hooked!

Fort Frances wants to acknowledge its special place in Sport Fishing in Canada. It wants to contribute to the preservation, enhancement, development and enjoyment of fish and fishing. It wants to expand its potential for community growth and development by retaining visitors and attracting new visitors. The Great Canadian Freshwater Sport Fishing Centre is envisioned as a key component in achieving these aims.

This study examines the scope of project that could provide a viable means of achieving these aims. It reviews issues related to the creation of a Centre including potential market, market access and community planning. The study provides a recommended approach to apply to the preparation of a detailed feasibility study for the Centre.



Markets

In keeping with the project's objectives, the focus of the Centre would be to provide information to differentiate and brand the "Canadian Sport Fishing Experience". Target audiences would include:

- 75,000 residents of Sunset Country
- 280,000 residents of Northern Minnesota
- 200,000 American anglers who visit Sunset Country each year
- 1.5 million anglers (age 16 and over) who fish in Minnesota
- 8.2 million anglers (age 16 and over) in the North Central United States
- 6,000 international visitors to the region (and growing)
- Thousands of general tourists to the region, many visiting friends and relatives.



There is currently limited opportunity to attract new visitors to fish in Sunset Country. Current regulations limit access to fishing and most access is filled during the busy seasons. The Centre needs to retain the interest of these existing visitors. It also needs to attract new visitation from people who are interested in fish and fishing but will not fish in Sunset Country as part of a trip. The market is there, it is located just across the international border in Northern Minnesota. The issue is how to create a compelling attraction that will appeal to this group.

Content

The content of the Sport Fishing Centre would emphasize the special and unique attributes of the "Canadian Sport Fishing Experience". It would provide information in packages that are fun, dynamic, interesting and fresh. The Centre would support the recreational activity of fishing and the sustainability of the resources that make up the experience. It would feature interactive displays, personnel, programs, travelling shows and resources that exhibit information about:

- Fish species, sizes, characteristics...
- Habitat and structure of specific waterbodies
- How to catch fish
- How to enhance and preserve habitat
- Special people (anglers, environmentalists, lodge owners, guides, characters, etc.)
- Special fish (trophies, ones that got away...)
- Equipment, lures and gizmos
- Collections
- Secrets....



This content can be provided at a whole range of scales, intensities, frequencies, duration and complexities. The appropriate level and specific type of development and programming will be determined as part of further design and planning based on what is necessary to attract the target audience in a fashion that is financially sustainable and intellectually and emotionally compelling.

Obstacles to Attracting New Visitors

One of the major objectives of this project is to attract new visitors to Fort Frances and the region. There is an existing market of several hundred thousand people just across the international border. These are people who are already vacationing or visiting the area but who do not now cross the border. Two major reasons are apparent based on recent interviews. Firstly, most Americans perceive or have a real concern about the way they will be treated by Canadian and US customs and immigration officials; what it will cost in bridge tolls and other charges; and how long it will take to cross the border into Canada and back to the United States at Fort Frances / International Falls. Secondly, most Americans are not even curious about Canada. They are completely satisfied with the experiences available in the States.

Resolving these issues is a necessary precondition for future tourism development including development of the Fishing Centre.



A Phased Approach

Given these conditions, this study has concluded that the Centre should be developed in phases. The mission of the Centre in Phase I would be to position Fort Frances as the gateway to freshwater sport fishing in Canada. This would permit the growth of an institution with a physical presence and sufficient resources to promote the preservation, enhancement, development and enjoyment of freshwater sport fish and sport fishing in Canada.

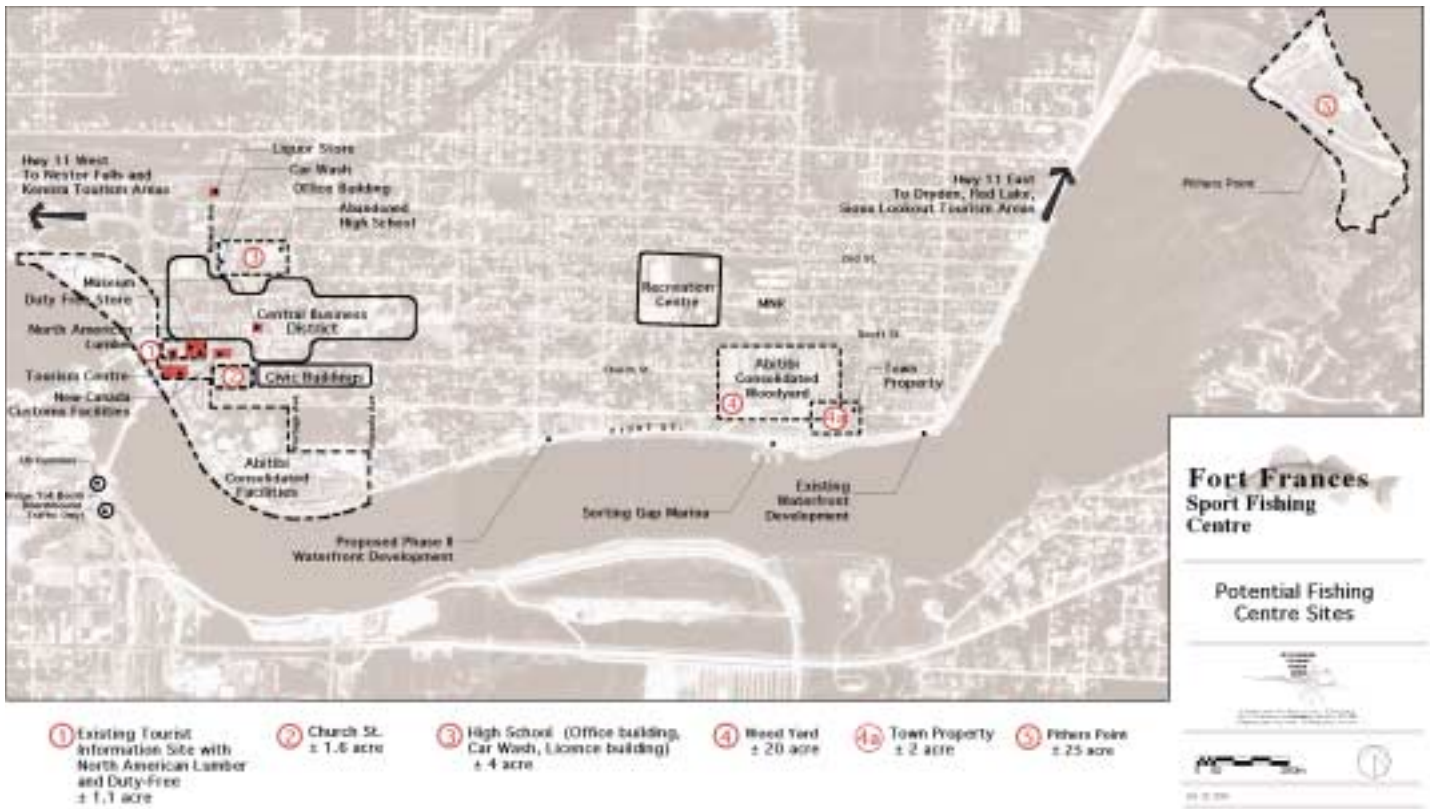
The initial phase would include a modest facility of about 4,000 square feet developed in partnership with a new Ontario Travel Centre in Downtown Fort Frances. It would also include a permanent executive director and a significant marketing budget.

The Centre would offer exhibitions and programs that address critical issues regarding the sustainability of the Canadian sport fishing experience; offer exhibitions and programs that address the unique attributes of the Canadian Sport Fishing Experience; and offer outreach programs to maintain and enhance sport fishing in Canada.

The target market would be local and regional residents, existing anglers who now pass through town and incidental other visitors. The Centre would also provide outreach programming beyond Fort Frances. Based on the experience of the Tourist Centre, visitation to the Phase I Fishing Centre could easily approach 50,000 per year, however these would be people who already visit Sunset Country and Canada, not new visitors.

This strategy could be viable and sustainable and would address many of the objectives of the community. It would not resolve the project objective to have a major draw to attract new visitors.





Phase II

In Phase II the Mission of the Centre would expand to include gathering significant collections and exhibits to support the original mission. The Centre would become known as a major attraction to all sport anglers who are curious or passionate about the Canadian Sport Fishing Experience.

Based on the experience of existing attractions in Canada and the United States, 40,000 to 50,000 paying visitors are necessary to justify and sustain a major facility. This level of visitation could be possible once the border issue is resolved. Systemic change to border structure and operating procedures and significant marketing and promotion are necessary to resolve this issue.



A facility of 15,000 to 20,000 square feet in size with ample grounds containing parking and outdoor amenity spaces will be necessary to fulfill the Centre's mission. Alternative sites that could provide sufficient space and context, include the Abitibi Woodyard and Sorting Gap Marina area and the Pithers Point area. The Centre would no longer be associated with the Ontario Travel Centre thus fewer existing tourists would visit. Achieving adequate and sustainable visitation levels could be possible by retaining former visitors and by attracting new tourists from the United States for day or overnight trips that would include a visit to the Sport Fishing Centre.

Conclusion

This study was commissioned to evaluate the ingredients necessary to successfully operate a Sport Fishing Centre in Fort Frances. Its findings are that a Centre is important to develop and that it could be viable.

A Freshwater Sport Fishing Centre would be an excellent vehicle for supporting sport fishing in Canada and for contributing to community development in Fort Frances . It would cultivate curiosity about fish, fishing and the personalities who make up the sport. It would make the Canadian experience attainable to more people. It would ensure that the fisheries issues are understood, heard and listened to and be a resource for anglers and conservationists to help support their aims.

A Canadian Freshwater Sport Fishing Centre is a necessary institution. The industry is large, the resources are rich, the market is broad and deep and the story is not being told. Fort Frances is arguably amongst the most important gateways for freshwater sport fishing in Canada and it is the logical site for such a venture.



Next Steps

This study recommends that Fort Frances continue its efforts by immediately developing a partnership with the proposed Ontario Tourism Centre. This partnership would lead to the creation of the first phase of The Great Canadian Sport Fishing Centre and to the creation of the institution to foster its ongoing growth and development.





The Great
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CANADIAN FRESHWATER SPORT FISHING CENTRE

Fort Frances, Ontario

Executive Summary i

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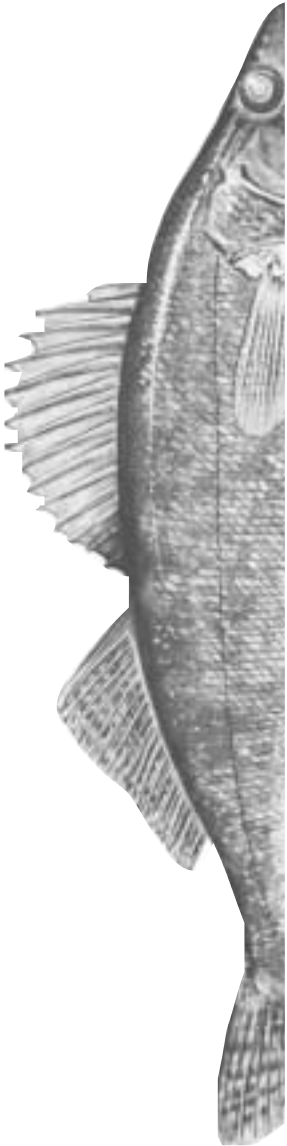
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More than just another pretty fish!

1.0 Introduction

The Rainy River *Future* Development Corporation, as economic development agency for the Town of Fort Frances, is seeking to develop a major tourism attraction within the Town of Fort Frances. The attraction would be based on the notion that Fort Frances has been a major gateway to sport fishing for almost a century, and appropriately would be named and themed: “The Canadian Freshwater Sport Fishing Centre”.



This portion of the project evaluates the components needed to successfully develop and operate the Centre and compares them to the current conditions within Fort Frances. This evaluation is based on consolidating and analysing existing research, as well as personal communication with knowledgeable individuals in the tourism, fishing and education industries. Ultimately, the goal of this initial phase is to determine if the Canadian Freshwater Sport Fishing Centre is a viable concept for the conditions that exist in Fort Frances. If the outcome is positive, the concept would have merit to advance to a second phase. The second phase of the concept would be to outline a more detailed concept and specific action plan.

1.1 Canadian Freshwater Sport Fishing Museum and Hall of Fame Incorporated

The Canadian Freshwater Sport Fishing Museum and Hall of Fame, although not yet a physical reality, is incorporated as a not for profit organization. Its Articles of Incorporation state that its purpose is to:

- a) Foster and promote public understanding and knowledge of Canadian sport fishing.
- b) Foster and promote public understanding of the nature and extent of the impact of Canadian sport fishing on the environment and the economy.
- c) To provide for gathering, maintenance and the publication of information and the holding of educational lectures, public and private meetings, seminars and conferences on the subject of or with regard to Canadian sport fishing and on the subject of our environment and economy in relation thereto.
- d) Expedite the formation of local and regional citizens' groups for the purpose of identifying environmental and economic problems and issues in relation to Canadian sport fishing and ancillary matters, searching for methods of responding to such problems and identifying solutions thereto and demonstrating the role citizens can play in these issues.
- e) Undertake or sponsor all forms of scientific research, environmental studies and economic analysis relating to Canadian sport fishing related environmental and economic matters.
- f) Assist local and regional citizens' groups in furthering their objectives in relation to existing or proposed Canadian sport fishing.

1.2 Steering Committee

The concept of a Sport Fishing Centre first emerged during the preparation of the Fort Frances Waterfront Plan, Phase II (1999). In 2001, a Steering Committee of Fort Frances residents was formed to oversee the concept and purpose of a sport fishing centre. The Steering Committee's mandate was to approach the idea of a sport fishing centre, develop and tender a terms of reference for a feasibility study, work with the consultants that were chosen, and make recommendations to the town for any future work on the project.

The Steering Committee members include:

Geoff Gillon, Rainy River Future Development Corporation
Rebecca Webb
John McTaggart
Bruce Lidkea
Jim Cumming

Hilderman Thomas Frank Cram was selected by the Steering Committee to undertake the project. The team at Hilderman Thomas Frank Cram includes:

Jeff Frank
Heather Cram
Stacey Bruyere

1.3 Objectives

The objectives of the Canadian Fresh Water Sport Fishing Museum and Hall of Fame were refined through consultation between the steering committee and consulting team to include areas of public education, tourism development and community development. The following objectives will provide the measure by which opportunities will be evaluated.

Public Education

- Foster and promote public understanding and knowledge of Canadian sport fishing
- Foster and promote public understanding and knowledge of the impact of Canadian sport fishing on the environment and the economy
- Gather and maintain information regarding Canadian sport fishing and its impact on the environment and the economy and publish and present this information to the public
- Undertake and/or sponsor research regarding Canadian sport fishing and its impact on the environment and the economy
- Promote citizen action in learning about and responding to issues related to sport fishing
- Assist local and regional citizens groups to further their objectives in relation to sport fishing

Tourism Attraction

- Create an attraction that can define Fort Frances as a tourism destination rather than a gateway
- Create an attraction for existing pass through visitors to stop and visit Fort Frances
- Create an attraction to entice new visitors other than anglers, to diversify market
- Provide product for the M.O.M.'s Route and the Old Road initiative

Community Development

- Enhance the Fort Frances waterfront and provide a local amenity
- Support private sector business in Fort Frances
- Provide a focus for marketing
- Support the regional sport fishing industry and assist it to maintain and enhance its market

1.4 The Vision

The objectives for the Canadian Sport Fishing Centre provide a vision.

The Canadian Sport Fishing Centre will be a place that people are drawn to in order to learn about fish in the boreal region of Canada. It will be a teaching place about:

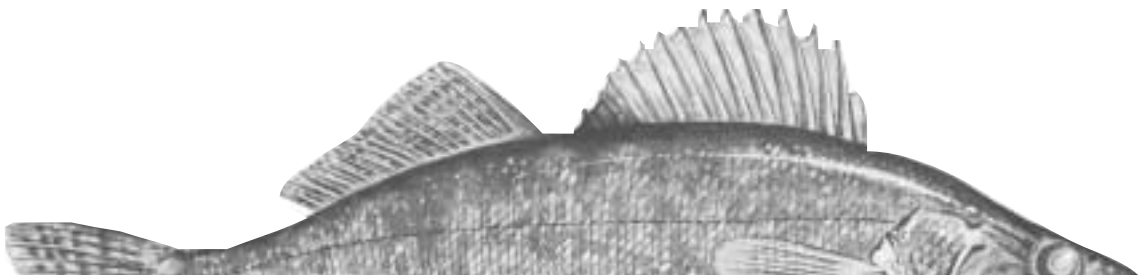
- *where fish live*
- *how fish think*
- *how to catch a fish*
- *how to release fish*
- *how to conserve and replenish fish stocks for future generations*
- *how to enjoy the sport of fishing in a responsible fashion.*

It will be a place where information about fish, fishing and fish habitat is collected and presented in a colorful and entertaining fashion. It will be fun!

It will promote the unique attributes of the sport fishing resources and opportunities in Sunset Country.

The Centre will host programs to promote the conservation of fish and fish habitat in order to provide healthy fish populations and sustainable recreation opportunities for people. It will be the definitive resource centre for information about sport fishing in Northwestern Ontario and adjacent jurisdictions.

It will operate co-operatively with other individuals, groups and organisations that have an interest in sport fishing.



2.0 Geographic Context

The Town of Fort Frances is located in Northwestern Ontario. The Town, with a population of near 9,000 (Statistics Canada, 1996) is situated on the Rainy River, which serves as the border between the Province of Ontario and the State of Minnesota. The adjacent city on the U.S.A. side of the Rainy River is International Falls, Minnesota. Because it provides convenient access from the Midwestern United States to the Sunset Country Tourism Area, Fort Frances has become an important gateway to Canada from the U.S.A. (Fig.1).



Sunset Country

The Sunset Country Travel Region encompasses the town of Fort Frances, as well as many other towns, including Kenora, Dryden, Morson, Red Lake, Ear Falls, Sioux Lookout and Atikokan. In total, Sunset Country encompasses **60,000 square miles**, and has a permanent year round **population of 75,000** (Sunset Country Travel Association, personal communication, 2001). Physiographically, Sunset Country offers two spectacular forest zones – the Great Lakes St. Lawrence Forest in the extreme south of the region and the Boreal Forest for the remainder.

The Great Lakes St. Lawrence Forest is a transitional zone between the southern deciduous forest of eastern North America and the coniferous Boreal Forest. In this region, coniferous trees such as white pine, red pine and cedar commonly mix with broad leaved species such as yellow birch, basswood and oak.

The Boreal Forest is Ontario's largest forest region. It features various forest types consisting of coniferous and deciduous trees, including white and black spruce, tamarack, balsam fir, jack pine, white birch and poplar. The terrain of the Boreal Forest varies from lowland peat bogs to deep fertile upland soils to bedrock covered by thin layers of soil and moss.

As can be seen in Figure 2, Sunset Country is within the Northern Forests ecoregion. The northern US states are also part of this ecoregion.

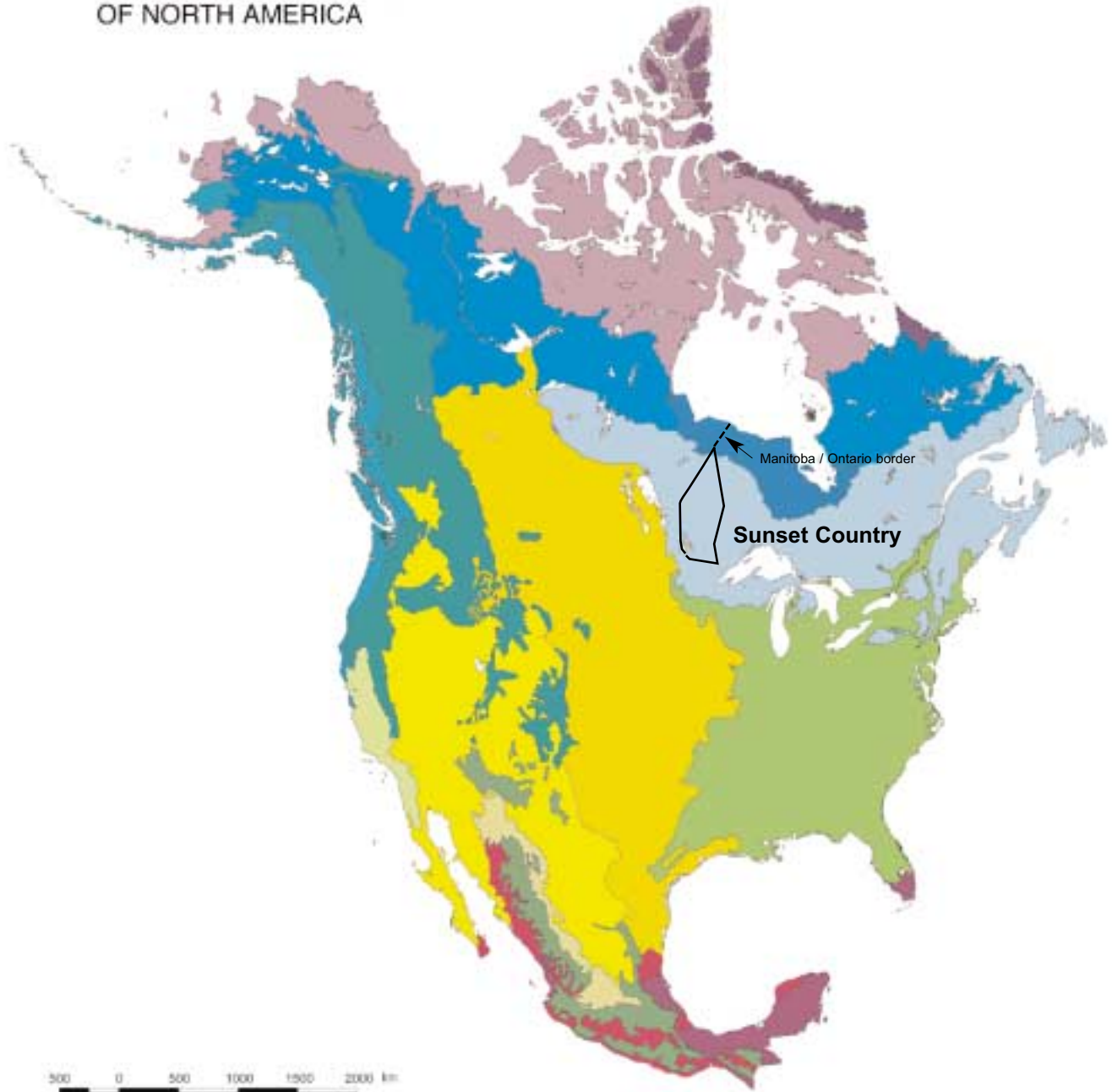
Throughout all of Sunset Country, water is prominent. The Travel



Figure 1

Figure 2

ECOLOGICAL REGIONS
OF NORTH AMERICA

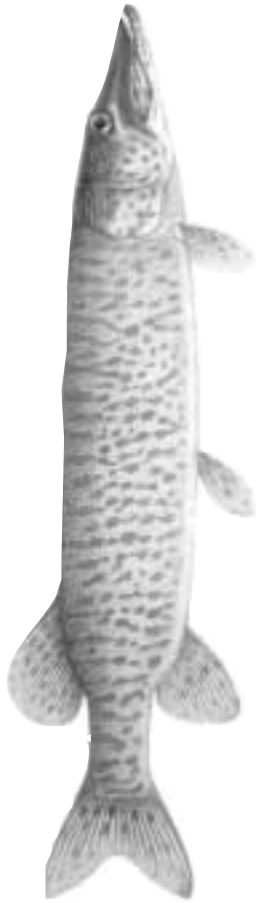


Level I Regions

- | | | |
|---------------------|-----------------------------------|---------------------------------|
| 1 Arctic Cordillera | 6 Northwestern Forested Mountains | 11 Mediterranean California |
| 2 Tundra | 7 Marine West Coast Forests | 12 Southern Semi-Arid Highlands |
| 3 Taiga | 8 Eastern Temperate Forests | 13 Temperate Sierras |
| 4 Hudson Plains | 9 Great Plains | 14 Tropical Dry Forests |
| 5 Northern Forests | 10 North American Deserts | 15 Tropical Humid Forests |

Source:
- *Ecological Regions of North America: Towards a Common Perspective*, Commission for Environmental Cooperation, 1997

Association promotes 100,000 lakes as its major attraction on its website. These lakes have made all of Sunset Country famous for fish and fishing. Surprisingly, the fish species which Sunset Country boasts about are common throughout much of Canada and the United States. For example, walleye, a species that many have savoured over a shore lunch, can be found throughout most of Central and Eastern Canada and the United States. The same goes for northern pike, which can be found in most of Canada and the northern United States. Muskies have a more limited range, but still are located throughout the Northeastern United States and Central and Eastern Canada (Fig.3).



The areas of Sunset Country which are heaviest populated are located along Canada's Trans Canada Highway, and includes the towns of Kenora and Dryden. Other major transportation routes in the region include the highways that lead to and from the Canadian / U.S.A. border such as Highways 11 and 71. Much of the northern region of Sunset Country is accessible only by airplane or winter road. It is this seclusion that makes Sunset Country appealing to persons wanting to escape to the wilderness.

For the most part, the economy of Sunset Country is established on the forest industry. Large pulp and paper mills are located throughout the region. The mills are the backbone of a much larger industry which includes people employed directly and indirectly with logging. Employment because of the forest industry ranges from timber cutters, to transport drivers, to fire crews and civil servants of various specialities. The other industry that is prominent in Sunset Country is tourism. There are numerous operations throughout the region that have been in business for generations and are involved through some mean, with tourists. Examples of such businesses include lodges and resorts, service stations and restaurants.

Northwest Ontario's Sunset Country:
Canada's Premier Fishing Destination



Crappie (Black)



Sunset Country

Muskellunge



Smallmouth Bass



Walleye



Lake Trout



Northern Pike

Source: Casselman Sportfishing, Inc., 2001

Figure 3

Distribution of Freshwater Fish Species

Northeastern Minnesota

Adjacent to Sunset Country on the U.S.A. side of the border is Northeastern Minnesota. For the purpose of this report, Northeastern Minnesota covers six counties – Koochiching, Itasca, St. Louis, Cook, Lake and Lake of the Woods. Lake of the Woods County is typically not included in the Northeastern Region because it is more centrally located, but because it borders Sunset County, it is included here. The year round combined population of these counties totals 279,623 (U.S. Census Bureau, 2000). The total land base for all six of these counties is 16,840 square miles.

From a tourism and promotion perspective, Northeastern Minnesota appears similar to Sunset Country. The slogan for the Northeast Minnesota Tourism Region is the “Wild North”. The 2000 Visitor Guide states that “water is a huge part of our life – but don’t forget our magnificent forests, where wildlife thrives and a person can truly experience the majesty of nature”.

Physically, this part of Minnesota has additional characteristics that again appear similar to Sunset Country. The forest biome is coniferous, which supports pine trees along with spruce, fir and tamarack. Along the northern most borders of Minnesota, this forest combines with aspen, birch, maple and basswood. Although this description sounds similar to Sunset Country, there are differences. For example, both countries share Lake of the Woods, but the Canadian side of Lake of the Woods has many more islands and underwater caverns, making both the appearance and fish habitat different. So even though these neighbouring regions offer forests, water, and fish, the attributes of each is different.

The major highways in Northeastern Minnesota include numbers 2, 53 and 61. They easily connect with the Interstate Highway System which efficiently links the entire United States, east to west and north to the south. Interstate 35 runs right into Duluth in St. Louis County. Interstate 35 is the major route for midwest U.S.A. traffic which comes into Canada via Fort Frances. United States residents that most frequently enter Canada by this border crossing are from Minnesota, Wisconsin, Iowa, Illinois, Missouri and Nebraska. These six states have a total population of almost 33 million.

The economy in northeastern Minnesota is much more diverse than Sunset Country, due in part to the much smaller land base and much higher population. According to the Minnesota Department of Trade and Economic Development (July, 2000), the fastest growing industries in Northeast Minnesota include amusement services, apparel, heavy construction, and business services. However, “services” in general and retail services were the two sectors with the greatest growth rate.

The International Border

With the signing of the Treaty of Paris in 1783, Great Britain and the United States agreed to an international boundary that would separate the two countries. However, the boundary from Maine to Lake of the Woods was only defined as the “usual water communication”. West of Lake of the Woods, the boundary was to be the 49th parallel. It was not until the late 1920’s that the boundary line between Canada and Minnesota was actually defined, and the Rainy River became known as “the border”.

In 1912, the first bridge between Fort Frances and International Falls was constructed. The bridge, although narrow, was designed for two way traffic, and a one way trip fee was put in place of five cents U.S. for cars and fifteen cents U.S. for trucks. In today’s dollars, five cents equals approximately ninety cents. Currently, a bridge is still in place, although use of the bridge has increased dramatically. The bridge is designed to support two way traffic on four lanes, as well as transport trucks and a locally operated train. The bridge is privately owned and operated by The International Bridge and Terminal Company, a division of Boise Cascade, a U.S.A. corporation. To cross the bridge today, a passenger vehicle pays once, while entering Canada. The \$6.00 U.S. (\$9.00 Canadian) fee for a regular passenger vehicle covers the return trip as well. There is no discount if you plan on only using the bridge one way.



International Bridge, 1912

Since the bridge has a Canadian Customs and Immigration Facility at one end and a U.S.A. Customs and Immigration Facility at the other, all traffic, going either way is subject to inspection. The increased use by both locals and tourists of the Fort Frances / International Falls border crossing has exerted pressure on the customs facilities. As a result, during the peak tourist season, most notably on weekends from May through September, long lines of vehicles usually form on both sides of

the border. While entering Canada on the U.S. Memorial Day weekend, it is not unusual for vehicles to wait up to six hours to enter Canada.

In an effort to alleviate the long line-ups, and deal with the increased use of the border crossing, Canada Customs and Revenue Agency has started construction of a new facility on Church Street in Fort Frances.



3.0 Issues Related to Current Sport Fishing Activity



Since the turn of the twentieth century, Canada has been a popular destination for sport fishermen from the United States. But what makes this region so appealing? One hundred years ago it may have been the elusive muskie that was the intrigue, but those days have dwindled. The fish and the forest are factors, but at a different quality level, fish and forests are also available in the United States, and in particular, Northern Minnesota. These days, the true “lure” of Canada is the experience and the anticipation of the experience. Already renowned for “big fish”, Canada also offers a sense of remoteness and serenity. The exposed bedrock, giant white pine, Native guides and sizzling shore lunch are integral components of that experience.

Issues surrounding the sport fishing experience in Canada, and in particular Sunset Country, range from aesthetics to economic to environmental. A synopsis of the issues that were brought forth from interviews and research follows. However, based on the research, three statements can be surmised:

- i) Minnesota tourism statistics indicate that most visitors to Northeastern Minnesota do not or will not cross the border into Canada.
- ii) The Fort Frances border crossing has a bad reputation with residents of the Midwestern United States because of long line-ups and having to pay a bridge toll. The bridge toll gives the perception of having to pay to enter Canada. Canada Customs and Canada Immigration have a bad reputation because of their mandate and inspection process.
- iii) Recreation infrastructure and resorts in Northeastern Minnesota are very well developed. They offer more amenities than their Canadian counterparts, including casinos, golf, year round recreation trails and major attractions. The advantage that Canada has is big fish and isolated lakes – the true “Canadian” experience.



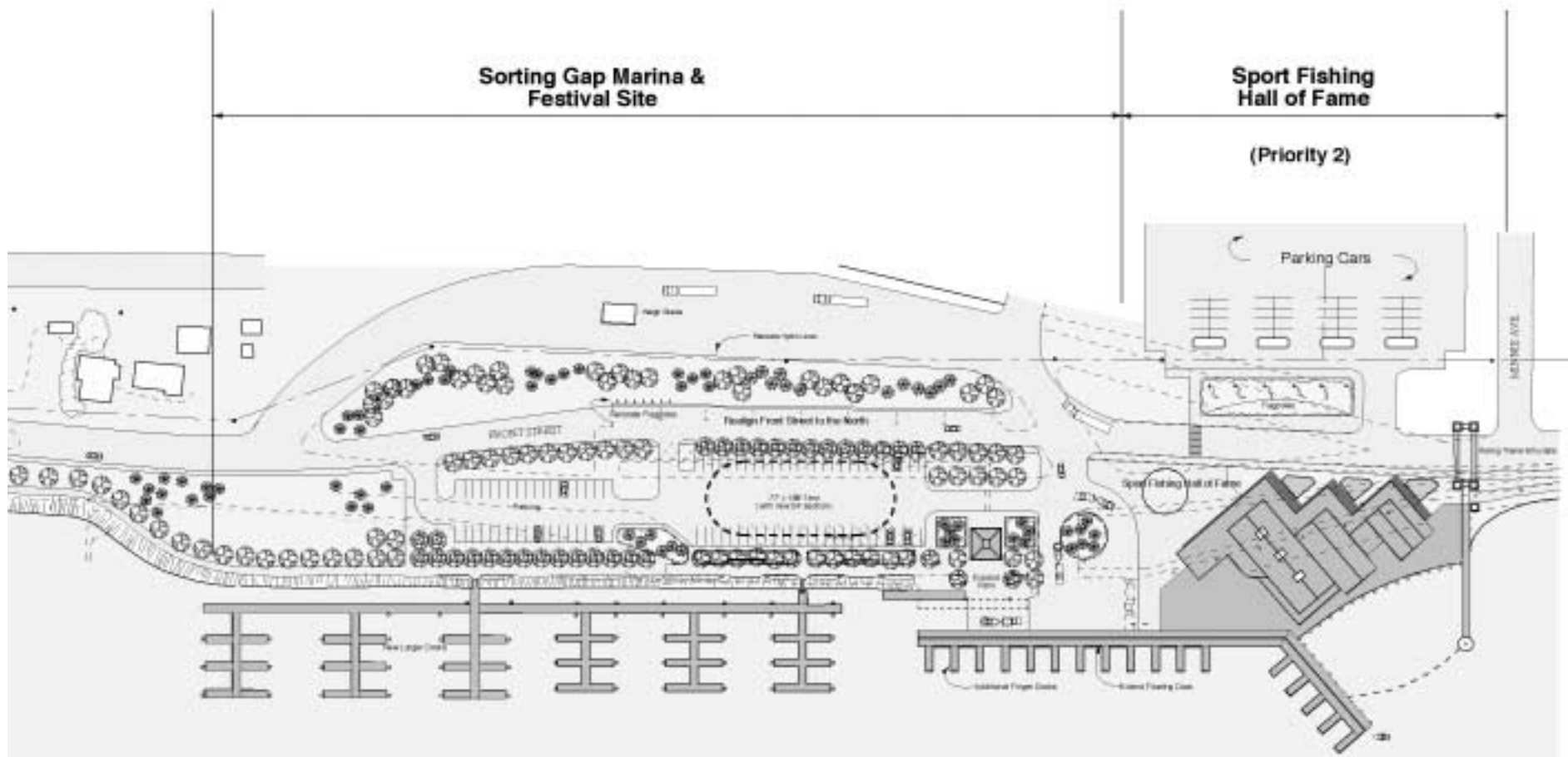
The following describes salient issues that will affect a Sport Fishing Centre in Fort Frances.

3.1 Issues Related to the Town of Fort Frances

- a) There is little existing direct economic activity from tourists, relative to the overall traffic that passes through Fort Frances.
- b) The Town of Fort Frances is a gateway to sport fishing, but not viewed as, or used as, a stopping point. The majority of visitors may stop at the existing Ontario Travel Centre or at a fast food restaurant, but not stop to shop or look for other attractions in Fort Frances.
- c) The community wants to complete the waterfront development, and view the Centre as a possible and appropriate anchor. The waterfront development also has other issues, such as the possible relocation of the Abitibi Consolidated woodlot.
- d) Fort Frances currently has no tourism products or theme other than the International Bass Tournament. Existing attractions are primarily of local interest.
- e) Products that are appealing to tourists are needed for the M.O.M.'s route and Old Road initiatives.
- f) Tourists come to the region for the curiosity of the Canadian fishing experience. This curiosity is not being stimulated. Products and services are not available in Fort Frances to satisfy this curiosity.
- g) The Centre needs to be a viable and sustainable independent entity.
- h) There is a need on both a local and visitor level for public education about fish conservation.
- i) Local entrepreneurs and existing businesses capture little economic benefit from tourists.



Fort Frances Bass Tournament



Fort Frances
Waterfront
Development Plan

Priority One Projects

Figure 4

3.2 Issues Related to the Ontario Ministry of Natural Resources (MNR)

- a) The existing sport fishing resource is near capacity in most of the region. MNR would not support expansion of angling pressure.
- b) Habitat and fish stocks are, for the most part, in good shape. Angling is the only variable that can be controlled. Indirect control of fishing effort is the most effective method. Examples of indirect control include season when species can be harvested, geographic boundaries, size of fish that is legal, number of rods or other equipment that can be utilised, or limits. Limits are only one tool within the regulatory regime and are more directly related to social sharing (i.e., there is enough resource for all who desire it).
- c) Public education is needed to modify angling behaviour to assist in conserving the resource. Based on checks by conservation officers, what tourists and resort owners are reporting as far as conservation methods (catch and release) may not be accurate. Some tourists that hold conservation licences are taking home much more fish than they are allowed.
- d) The Natural Heritage Information Centre has no system for classifying and recording aquatic ecosystems. Lands for Life did not deal with aquatic environments. The federal government has responsibility for fish habitat, therefore Fisheries and Oceans Canada may need a greater presence in the region.



3.3 Issues Related to Sunset Country Tourism Association

Based on a 1999 survey of visitors to Sunset Country, the Association offers the following:

- a) Interest in the ecotourism sector is considerable, however there are few products in the region to promote.
- b) Family trips to Sunset Country are mostly oriented towards fishing.
- c) Eighty percent (80%) of business is U.S.A. based.

3.4 Issues Related to Lodge Operators

- a) Most serious anglers want to begin fishing as quickly as possible at the start of their trip. They will not be easily diverted from this goal on the way in, but possibly may be diverted on their way back.
- b) Less serious anglers, later season visitors and families are more flexible and may be prepared to take a day out of their trip for another experience.
- c) Clients are very much into catch and release. Lodge owners explain and promote conservation to their guests. This information conflicts with MNR's interpretation.
- d) Guests who travel to their destination via Fort Frances complain that the town stinks (mill odour).
- e) More guests are using the border crossing at Rainy River, ON / Baudette, MN. This border crossing quickly acquired a reputation for no fees and no wait.
- f) Lodges can no longer buy bridge tickets to send to their guests.

- g) Most complaints about Fort Frances have to do with the border crossing. It is a major obstacle because of long lines, perception that you are paying to get into Canada, the lengthy inspection process (complaints of being torn apart, and also waiting to get torn apart, and the fear of getting torn apart).
- h) Many guests do not have a knowledge or understanding of Ontario's Natural Resource regulations.
- i) On rainy days, most guests choose to travel to Kenora rather than Fort Frances. Their idea is that they have already seen and experienced Fort Frances because they drove through it to get to their destination.
- j) One resort suggests to all of their guests to visit the Ontario Travel Centre in Fort Frances to phone ahead that they are on their way to the resort, use clean restrooms, and to get information on regional attractions.
- k) There is a need to provide information and reinforce a good experience to fishermen (i.e., colour of the week, prizes for catches, etc.).
- l) Lodge operators indicate that a Sport Fishing Centre in Fort Frances would provide little benefit to their marketing efforts.

3.5 Issues Related to American Fishermen in Canada

- a) Most fishermen reported that they had no time for anything but fishing. Visiting attractions of any type was not a priority.
- b) First impression of Fort Frances was that it smells bad.
- c) The line up at the border was unexpected.
- d) Easy to pull through parking lots are important, and enticing to stop at (e.g., McDonalds restaurant was specifically noted.)

3.6 Issues Related to American Fishermen in the U.S.A.

- a) Most individuals who were interviewed had very little interest in going to Canada. Reasons were numerous and include: border line ups, other border hassles (including being torn apart, misinterpretation of what is legal and illegal to have at the border, criminal records), small fish limits, not wanting to practice catch and release, U.S.A. offers everything they need for their fishing trip (including fish and nice looking lakes), and casinos and other forms of entertainment to enhance their own trip or enable them to bring non-fishermen friends or family with them.
- b) Only one group of fishermen were on their way back from Nestor Falls (Canada). They go to Canada every year and plan on going again.
- c) Five groups had been to Canada and would NEVER go back. The major reason for not returning was hassles at the border.
- d) One group had been to Canada, enjoyed Canadians, but still felt that Lake Vermillion in Minnesota has more to offer.
- e) Two groups have not been to Canada and have very little interest in going because of the rumour of hassles at the border.

3.7 Issues Related to Resource Management

According to the Canadian Tourism Commission (CTC),

Tourism based on outdoor activities is a growing international market. Our natural outdoors present untapped resources for hard and soft adventure tourism, for eco-tourism and for generally enjoying the outdoors ... Canada has the resources to support significant growth in tourism products throughout the year. However, tourism's reliance, in Canada, on the natural, cultural, and physical environment requires that these resources be of an appropriate quality, authenticity and diversity to support tourism. The tourism appeal of a destination is impacted not only by the quality of a tourism product or experience, but by the existence of competing resource uses. Resources should be appropriate to the ecosystem, taking into consideration the inherent limits of fragile ecosystems and environments. Tourism stakeholders should be involved in all resource use decisions that impact the viability and longevity of the tourism industry (www.canadatourism.com).

Since sport fishing and the “Canadian” experience have been the major tourism products of Sunset Country, it is essential that these products be managed so that the quality is available in the long term. The management of the resource must come from all who are involved. To date the tourism industry has not taken ownership of promoting resource management as an attraction.



4.0 Market Assessment

The following describes the scope and attributes of potential markets for a Sport Fishing Centre. It describes current trends that will influence tourism in Northern Ontario for the coming years and characterises existing visitation to the region.



4.1 Current Trends

Northern Ontario has increasingly been a witness to the five tourism trends that were identified by the World Tourism Organization (WTO) in 1998 as being the rage in the 21st century:

1. Adventure Tourism
2. Cruises
3. Ecotourism
4. Cultural Tourism
5. Themes

A report produced by the Ministry of Northern Development and Mines (Dave VanWagoner, 2000) identified trends for the North of Superior region of Ontario which are relevant to Sunset Country as well. These trends include:

Demographic shifts - the aging of the baby boom: *The aging of the overall population, and the baby boomer market is bringing new opportunities to the tourism market. Studies find that addressing the health and security concerns of aging travelers is becoming a significant portion of travel packaging. Over the next 5 - 10 years, the group's richest pre-retirement and retirement individuals in the history of North America (with highest overall net worth) are expected to spend some of their discretionary income on travel.*

Increasingly sophisticated travelers: *Current travelers are generally older, healthier, better traveled, more demanding, and possessing more disposable income than their predecessors. They are looking for new and different destinations offering unique cultural experiences and contact. As a result, specialized and personalized services will be demanded.*

Desire for education / self improvement: Consumers are becoming interested in travel experiences that are educational as well as entertaining and relaxing, and that allow for learning and skills development.

Desire for hands-on participatory experiences: There has been a shift in preference away from passive observatory types of tourism experiences towards those which offer participatory opportunities.

Decline in “mile-eater” tourism: Covering large distances in record time is fading out as a key motivation for travel. Shorter planned vacations that allow travelers to meet the local people are becoming more important.

Heightened awareness and interest in First Nations’ issues: First Nations’ issues are currently top-of-mind in the public affairs arena and this has created a greater awareness of and interest in Native history and culture as a key travel motivator and attraction for both domestic and international travelers.

Emerging overseas markets: The number of overseas visitors to Canada has grown steadily since 1980 at a rate of about 3% per year. In 1999, overnight trips by overseas residents increased by 6.4% (from 1998) to 4.2 million. All of Canada’s major overseas markets recorded increases in overnight trips in 1999. Japan had 516,000, the UK 780,300, Germany 392,500 and France 413,000 (U.S.A. is still our number one foreign market with 15.2 million visits in 1999). The Ontario Ministry of Tourism forecasts that by 2003 Ontario will receive 2,305,000 visitors from overseas.

Adventure / remote tourism: There is a growing interest in various forms of outdoor recreational pursuits, often in unusual, exotic and remote destinations. Participation in this so called “adventure travel” is growing at 15% - 20% per year, primarily in soft, safe adventure vacations that combine adventure by day and comfort by night without the hardships of traditional wilderness adventure travel.

Ecotourism / nature based tourism: Travelers are looking for vacations that bring them closer to the environment and / or provide them with the opportunity to be conservationists. This is generating interest in learning about, protecting and experiencing natural resources through interactive study tours.

Sustainable development / resource conservation: Sustainability of natural resources is becoming increasingly important in tourism development and management, as the result of stronger interest by government in environmental protection. Developers and operators are embracing resource conservation and management as important business objectives, while shifting from consumptive to non-consumptive tourism development and activities in response to travelers preferences.

Increasing competition: With the growth of the small business sector of our economy and the generally entrepreneurial character of tourism development, there is a steady increase of new competitors entering the tourism marketplace. Competition for the adventure / ecotourism market is particularly intense, with packaging and marketing techniques becoming more sophisticated as a basis for competitive advantage.

Revival of package tours: Travelers are again looking for all inclusive travel arrangements where they pay one shot and the trip is organized from start to finish, as a means of obtaining greater value for their travel dollar.

4.2 Existing Market

The existing market for a Sport Fishing Centre would include the residents of Fort Frances and the remainder of the district, as well as a proportion of U.S.A. residents who already come into Canada through the Fort Frances border crossing.

4.2.1 Canada / U.S.A. Border Crossing Data

- In the year 2000, 438,805 American citizens crossed into Canada at Fort Frances.
- In the summer of 2000, 242,000 American citizens crossed into

FORT FRANCES SPORT FISHING CENTRE

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Regional Border Crossing Data

Table 1

American Vehicles Entering Canada													
Border Points													
2000	Fort Frances	Pigeon River	Thunder Bay	Rainy River	S.S.M.	TOTAL	1999	Fort Frances	Pigeon River	Thunder Bay	Rainy River	S.S.M.	TOTAL
Quarter 1	30,788	12,567	0	9,230	68,516	121,101	Quarter 1	29,126	12,919	0	6,305	66,244	114,594
Quarter 2	61,975	26,999	0	14,249	89,826	193,049	Quarter 2	61,416	29,182	0	13,004	88,146	191,748
Quarter 3	76,915	39,947	0	17,047	136,712	270,621	Quarter 3	76,502	43,577	0	17,420	139,904	277,403
Quarter 4	29,287	13,689	0	9,425	73,611	126,012	Quarter 4	30,776	14,571	0	9,002	76,482	130,831
total	198,965	93,202	0	49,951	368,665	710,783	total	197,820	100,249	0	45,731	370,776	714,576
Q 2&3	138,890	66,946	0	31,296	226,538	463,670	Q 2&3	137,918	72,759	0	30,424	228,050	469,151
Q 1&4	60,075	26,256	0	18,655	142,127	247,113	Q 1&4	59,902	27,490	0	15,307	142,726	245,425
tourists %of total	78,815	40,690	0	12,641	84,411	216,557	tourists %of total	78,016	45,269	0	15,117	85,324	223,726
tourists	36%	19%		6%	39%	100%	tourists	35%	20%		7%	38%	100%

American Residents Entering Canada(all methods -auto/plane/train/bus/boat/other)													
Border Points													
2000	Fort Frances	Pigeon River	Thunder Bay	Rainy River	S.S.M.	TOTAL	1999	Fort Frances	Pigeon River	Thunder Bay	Rainy River	S.S.M.	TOTAL
Quarter 1	49,444	14,641	580	16,827	118,436	199,928	Quarter 1	48,358	14,757	614	10,777	115,477	189,983
Quarter 2	147,208	55,374	1,630	29,691	169,606	403,509	Quarter 2	148,965	58,759	1,590	26,951	165,194	401,459
Quarter 3	193,203	93,904	2,632	37,337	308,655	635,731	Quarter 3	195,728	101,919	2,192	38,248	320,752	658,839
Quarter 4	48,950	18,251	5,833	16,723	131,113	220,870	Quarter 4	53,087	19,994	901	15,739	134,879	224,600
total	438,805	182,170	10,675	100,578	727,810	1,460,038	total	446,138	195,429	5,297	91,715	736,302	1,474,881
Q 2&3	340,411	149,278	4,262	67,028	478,261	1,039,240	Q 2&3	344,693	160,678	3,782	65,199	485,946	1,060,298
Q 1&4	98,394	32,892	6,413	33,550	249,549	420,798	Q 1&4	101,445	34,751	1,515	26,516	250,356	414,583
tourists %of total	242,017	116,386	-2,151	33,478	228,712	618,442	tourists %of total	243,248	125,927	2,267	38,683	235,590	645,715
tourists	39%	19%		5%	37%	100%	tourists	38%	20%		6%	36%	100%

Tourists = Q 2&3 minus Q 1&4

assumes that Q 1 & 4 represents normal commercial traffic. Therefore difference represents increase over normal commercial traffic...tourists.

Fort Frances Sport Fishing Centre

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Table 2
U.S. Vehicle entry into various N.Ontario border
Percentage of Total Traffic

	1995		1997		1999		2000	
	#	%	%		%		%	
Fort Frances	164,191	30.3%	159,505	31.5%	185,832	29.1%	185,213	29.1%
Rainy River	27,213	5.0%	31,883	6.3%	44,197	6.9%	48,651	7.6%
Pigeon River	64,096	11.8%	57,714	11.4%	74,023	11.6%	68,446	10.7%
S.S.M.	285,689	52.8%	257,667	50.8%	333,882	52.3%	334,702	52.5%
TOTAL	541,189		506,769		637,934		637,012	

Table 3
U.S. Vehicle entry into various N.Ontario border crossings
Percentage increase for Period

	1995		1997		1999		2000	
	#	increase over previous	increase over previous		increase over previous		increase over previous	
Fort Frances	164,191		159,505	-2.9%	185,832	14.2%	185,213	-0.3%
Rainy River	27,213		31,883	14.6%	44,197	27.9%	48,651	9.2%
Pigeon River	64,096		57,714	-11.1%	74,023	22.0%	68,446	-8.1%
S.S.M.	285,689		257,667	-10.9%	333,882	22.8%	334,702	0.2%
TOTAL	541,189		506,769	-6.8%	637,934	20.6%	637,012	-0.1%

Canada as “tourists” (2nd and 3rd quarter total crossings minus 1st and 4th quarter total crossings).

- Fort Frances handles the most summer tourist traffic through border crossings into Northern Ontario. 39% of all summer tourist visits to Northern Ontario occur through Fort Frances (37% Sault St. Marie, 19% Pigeon River and 5% Rainy River).
- The Rainy River / Baudette border crossing has been increasingly gaining use.
- Between 1994 and 1998 border crossings increased by about 16% at Fort Frances and about 45% at Rainy River. This amounts to a difference of about 7,000 vehicles per year who would have used the Fort Frances crossing had it retained its percentage share of traffic.
- In 1994 Fort Frances accounted for 86% of crossings in the region and Rainy River accounted for 14%. In 2000 Fort Frances’ share had declined to 81%.

Based on the most recent border statistics, Fort Frances is losing business to Rainy River due to the bridge and customs hassles.

4.2.2 Fishing Licences

- A total of about 540,700 non-resident fishing licences were sold in Ontario in 2000 / 2001 with a total value of over \$15.5 million.
- It is estimated that over 200,000 non-resident fishing licences were sold in Sunset Country in 2000. This represents over \$5.2 million in licence fees;
- The vast majority of these non-resident anglers in Sunset Country ($\pm 80\%$) would have arrived in Ontario through the Fort Frances border crossing.
- Licence revenue for the entire province is reviewed by a citizen board known as “The Fish and Wildlife Advisory Board.” In Sunset Country, licence revenue supports all Ministry of Natural Resource employees that deal with fish and wildlife, such as biologists and conservation officers.
- Published information with the “Ontario Outdoor Card” indicates that fish and wildlife funding is used as follows:
 - District Fish & Wildlife Operations - 25.6%
 - Fish and Wildlife Enforcement - 24.5%
 - Research & Monitoring - 17.6%
 - Great Lakes Operations - 10.1%
 - Provincial Programs & Regulations - 8.7%
 - Fish Hatcheries & Stocking - 6.4%
 - Marketing, Licensing & Client Services - 5.6%
 - Natural Heritage - 1.6%

Total licence revenue (fishing and hunting) for all of Ontario in 2000/2001 was over \$42.2 million.

- There is potential for licence revenue to support additional activities that support fish and wildlife. Although the Fish and Wildlife Advisory Board does not distribute the funds, their support is a valuable tool with which to approach the Minister of Natural Resources.

FORT FRANCES SPORT FISHING CENTRE

Oct. 22, 2001

Non-Resident Fishing Licences - 2000-2001

Table 4

type	Red Lake		Fort Frances		Sioux Lookout		Kenora	
	qty.	value	qty.	value	qty.	value	qty.	value
spousal	501	\$41,280		\$0	342	\$28,179	2141	\$176,407
seasonal	1280	\$69,395	6459	\$350,173	977	\$52,968	3775	\$204,661
1 day	155	\$1,911		\$0		\$0		\$0
conservation seasonal	543	\$17,460	3695	\$118,815	346	\$11,126	2595	\$83,444
7 day regular	17061	\$577,240	25436	\$860,599	10319	\$349,132	33730	\$1,141,217
7 day conservation	8458	\$170,113	20106	\$404,385	6626	\$133,266	22468	\$451,891
Total	27,996	\$877,399	55,696	\$1,733,971	18,610	\$574,671	64,709	\$2,057,619
Total Sunset Country (excluding Dryden, Atikokan and Ignace)	167,013	\$5,243,660						
Total Ontario	540,729	15,533,420						
% Sunset Country	31%	34%						

Source: Information provided by District MNR offices, July 2001

- There is no direct relationship between the location where licence fees were collected and where the licence fee revenue is spent.

4.2.3 Tourist Info Centre

- Current visitation is ±125,000 persons per year ... approximately 50% visit on arrival and 50% on departure (Ontario Ministry of Tourism).
- The current Tourist Centre is amongst the oldest in Ontario.
- The Ministry of Tourism is considering options for a Fort Frances gateway. Senior staff visited Fort Frances in August, 2001 to check out the implications of the new customs configuration.
- The current location will not be suitable once the new customs facility is in operation.

4.2.4 Overseas Visitors to Sunset Country

In 1996, a “Northern Travellers Profile” for Northern Ontario was completed by Research Solutions. According to the findings of the report, “ Even though they may be an important niche market for certain northern experiences, the overseas market is not a primary source of tourism for the north. Only 1-in-100 overnight visitors to the North at the national, provincial or regional level come from countries other than Canada or the United States.” In very recent years, Sunset Country has been witness to increased overseas visitors. At the Kay-Nah-Chi-Wah-Nung Historical Centre in Stratton, Ontario primary overseas visitors come from Germany and Holland. The Canadian Tourism Commission has been increasingly promoting Canada as a destination to overseas visitors, with primary targets being Germany, the United Kingdom, Italy and Japan.

The most recent statistics for Sunset Country in regards to overseas visitors are as follows:

- \$2.26 million total expenditures in 1998;
- \$1.44 million expenditures for “pleasure” travel;

- Approximately 6,000 visitors, mostly visiting family and relatives;
- Approximately 2,000 visitors participated in fishing / hunting; and
- Overseas visitors provide only a tiny fraction of visitors to Sunset Country.

4.3 Potential Market for Visitors to a Sport Fishing Centre

Substantial data has been gathered as to the potential market for a Sport Fishing Centre – a new market. For the most part, this new market would already be interested in sport fishing, and most likely would be from the United States. The Midwestern United States offers a high potential for new visitors because of their high population, proximity to the Canadian border and their love of freshwater angling.



While attracting new visitors may seem logical, there are other underlying problems. For example, most visitors would not come as day visitors solely for the Sport Fishing Centre. They would want to fish as well. During peak season in the Fort Frances area, lodges already have a high occupancy rate. The Ministry of Natural Resources restricts the number of beds that a resort can have. Putting additional beds in the lodges is not possible. Lodge accommodation issues have to be addressed.

Ideally, the Centre should be attractive to visitors in the shoulder seasons as well. Ecotourism and non-consumptive tourism products are in demand. However, in Sunset Country, products are not available to meet the demand for this growing market. The concepts of the Old Road and M.O.M.'s Route hinge on the development of new products, on a regional level.

4.3.1 Fishing in the United States of America

One of the most obvious potential markets for a Sport Fishing Centre would be people who are already interested in the sport. Fishing in the United States of America is already popular throughout most of the

country. Americans love to fish. They are mostly satisfied with their experiences in the States. Issues of crowding and not enough fish are not prominent on the radar screen of anglers. Canada's strength of being uncrowded with lots of fish has little advantage in this market.

The following statistics come from the U.S. Census Bureau (1996 and 2000 data).

- 28.9 million Americans fished in freshwater, excluding the Great Lakes in 1996. Participation has remained about the same since 1991.
- They spent \$10.01 billion on fishing trips, \$3.5 billion on fishing equipment and almost \$9.0 billion on special equipment (boats, campers, gear ...). Expenditures increased about 37% from 1991.
- They spent \$671.5 million on lures alone.
- There are over 8.2 million freshwater anglers residing in the North Central U.S.A., Sunset Country's primary market area.
- There are over 6.3 million freshwater anglers residing in the South Central U.S.A.
- 58% of anglers practiced catch and release.
- Over 2.4 million anglers participated in ice fishing.
- 65% of all anglers did not fish as much as they would have liked in 1996. Crowding, not enough fish, not enough places to fish, and restrictive catch limits were given as very minor reasons for not fishing more (<3% of respondents). The major reason for not fishing more was other time commitments such as work and family.
- Trends show that the number of anglers increased at over twice the rate of U.S. population growth between 1955 and 1996.

4.3.2 Fishing in Minnesota

Throughout all of Minnesota, fishing is a popular leisure activity. Minnesota is Sunset Country's single largest market. Minnesotans love to fish more than any other Americans, though most of their fishing is done near home.

- 25% of all domestic travel in Minnesota is for fishing.
- 1.5 million people over 16 years of age fished Minnesota waters in 1996.
- An additional 467,000 youth aged 6-15 fished in Minnesota in 1996.
- 66% of Minnesota residents fish.
- They spent 21.2 million days fishing in 1996.
- They spent a total of \$1.8 billion on fishing related expenses, including \$668.0 million on trips and \$778.0 million on equipment.
- They spent over \$30.0 million on lures alone.
- Of 1.1 million Minnesota anglers (over 16 years of age) only about 144,000 left the state to fish in 1996.
- 516,000 people visited Minnesota from other States to fish in 1996.
- Minnesota Fish Consumption Advisory is promoting "small fish are better fish", abundant small fish are more important than large fish.
- Minnesota Department of Natural Resources (DNR) regards their lakes as providing some of the "greatest Walleye fisheries in the world" (DNR website, 2001).
- Minnesota DNR stocks its lakes with 325 million hatchery fish each year.

- Cabela's sporting goods store in Minneapolis is the # 2 tourist attraction in Minnesota with visitation of almost 4.0 million in 1999. It is second only to the Mall of America.



4.3.3 Northeast Tourist Region of Minnesota

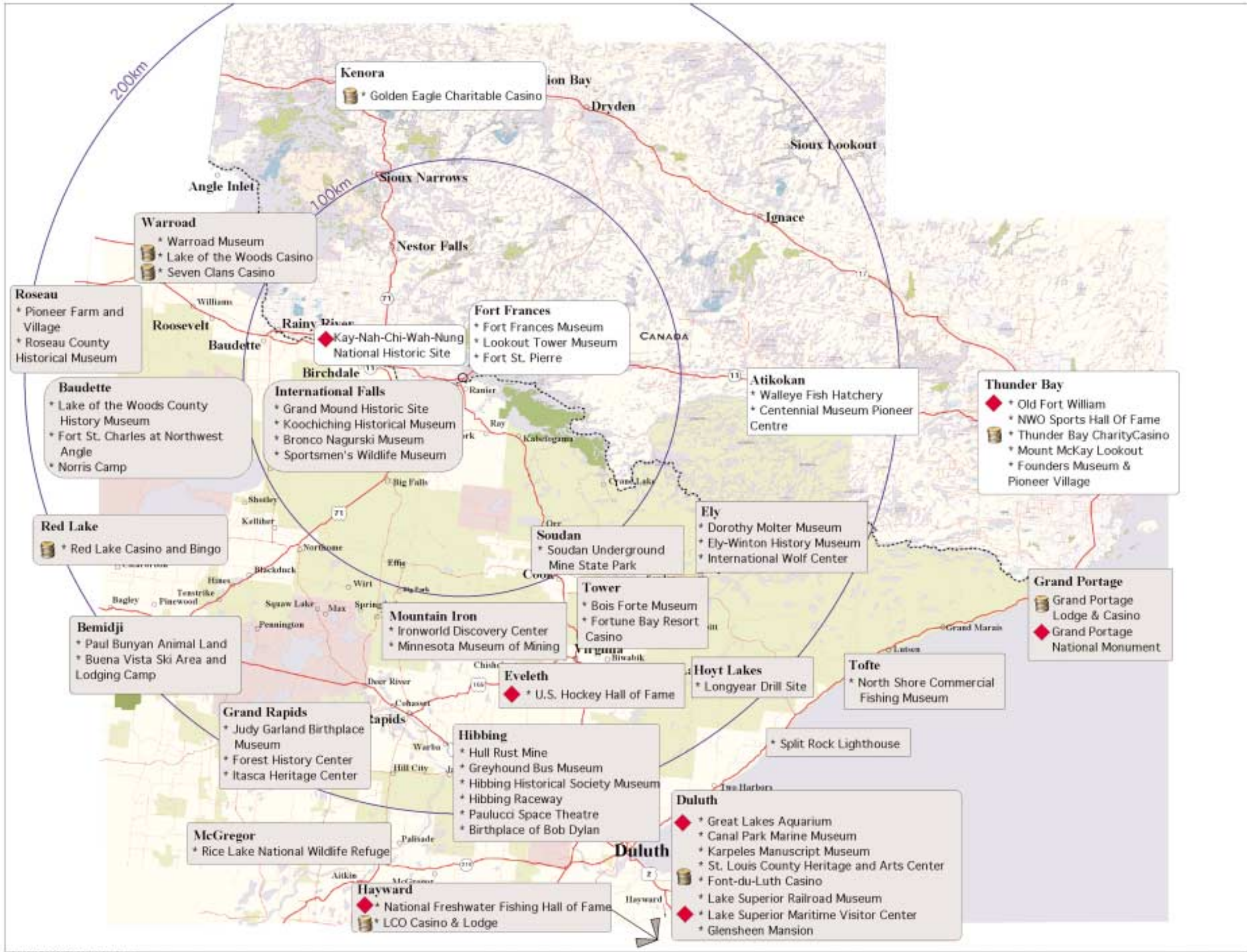
- 14% of all travel in Minnesota is to the Northeast tourist region.
- The estimated gross sales from tourism in Northeast of \$1,162.0 million in 1999.
- Itasca State Park attracted almost 500,000 visitors in 1999.
- Voyageur National Park attracted 228,900 visitors in 1999.
- 9 of the 10 largest walleye lakes in Minnesota are located in the Northeast Tourist Region.
- There are approximately 540 commercial accommodation facilities within 3 hours drive of Fort Frances ... about 150 within a 1.5 hour drive. (Total excludes the North Shore of Lake Superior.)
- The IRRRB has invested enormously in developing attractions and recreation infrastructure in the region. Golf courses,

recreational trails, destination attractions and interpretive centres have been developed.

- Casinos are a major attraction in the region.

Based on this information from Minnesota, it is evident that Fort Frances is located at the edge of a major American tourism destination area.

Fort Frances Sport Fishing Centre



Legend

- ◆ Major Interpretive Centre / Museum
- 🎰 Casino

Source: Minnesota and Ontario travel directories

Regional Attractions

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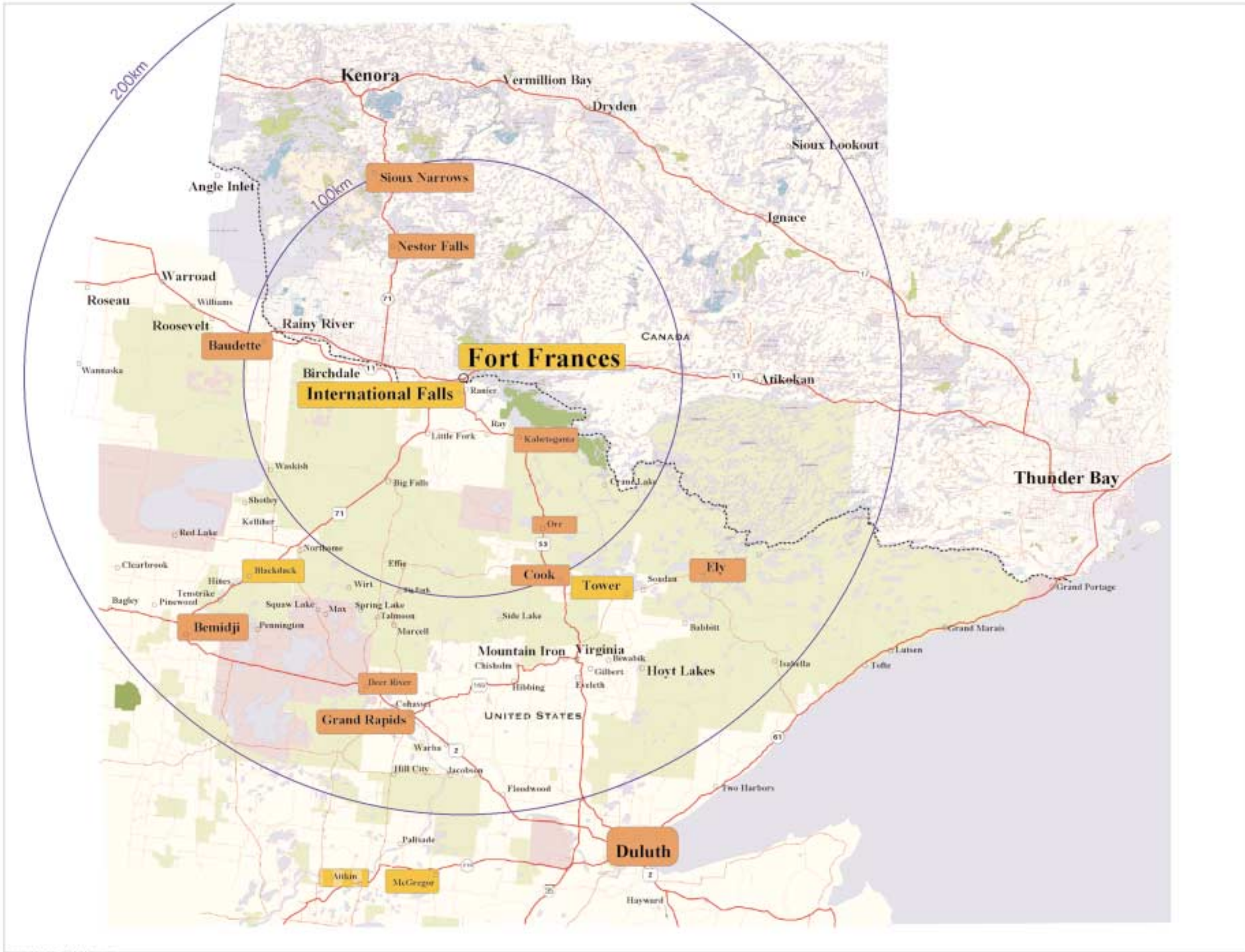


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4.3.4 Comparison of Northeastern Minnesota to Sunset Country

- There are about 277 registered commercial accommodation facilities in Sunset Country. There are about twice as many accommodation facilities in Minnesota within 3 hours of Fort Frances (excluding the North Shore) (Fig. 7; Table 5).
- U.S. residents spent about \$240.0 million in Sunset Country in 1998 versus \$1,162.0 million in Northeast Minnesota.
- U.S. residents from outside Minnesota spent approximately \$279.0 million on fishing trips in Minnesota in 1996.
- U.S. visitors to Sunset Country spent about \$360.00 (U.S.) per person / trip (1998). Minnesota residents spent on average of \$418.00 (U.S.) per person / year on trips. Non-resident visitors to Minnesota spent on average \$624.00 (U.S.) per spender per trip (1996).
- Minnesota accounts for about 35% of overnight visits to Sunset Country (about 136,000 visits) and 85% of same day visitors (about 476,000 visits) (1998).
- Minnesota residents spent 548,000 nights and 136,000 day visits for “pleasure” trips in Sunset Country. They spent about \$50.0 million in 1998 on “pleasure” travel. Assuming all “pleasure” trips were fishing trips, Ontario provided 3.2% of fishing days and 7.5% of trip related fishing expenditures for Minnesota residents in 1996 and 1998.

Fort Frances Sport Fishing Centre



Legend

- Major Resort Communities (> 20 accommodation facilities)
- Secondary Resort Communities (10-19 accommodation facilities)

Source: Minnesota and Ontario travel directories

Major Resort Communities

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Fort Frances Sport Fishing Centre

22-Oct-01

Accommodation in Minnesota within the Fort Frances Area:

Table: 5

City/Town	Number of Accom.*	City/Town	Number of Accom.*
Big Falls	1	Bagley	6
Birchdale	1	Biwabik	6
Jacobson	1	Roseau	6
Kelliher	1	Virginia	6
Max	1	Angle Inlet	7
Mountain Iron	1	Northome	7
Palisade	1	Side Lake	7
Ray	1	Squaw Lake	7
Roosevelt	1	Tenstrike	7
Shotley	1	Warroad	7
Soudan	1	Crane Lake	9
Wannaska	1	Hibbing	9
Warba	1	Marcell	9
Waskish	1	Blackduck	14
Wirt	1	International Falls	17
Chisholm	2	Tower	17
Clearbrook	2	Cook	20
Hines	2	Orr	24
Williams	2	Kabetogama	26
Eveleth	3	Grand Rapids	28
Pennington	3	Baudette	30
Ranier	3	Deer River	40
Talmoon	3	Bemidji	41
Effie	4	Duluth	54
Hill City	4	Ely	60
Little Fork	4		
Pinewood	4		
Babbitt	5		
Big Fork	5		
Cohasset	5		
Isabella	5		
Spring Lake	5		

Total accommodation 540

* As listed in *Explore Minnesota* website - includes both indoor lodging and camping accommodations

The volume of traffic on American highways compared to Sunset Country illustrates the different intensities of development. Fig.8 shows average annual daily traffic volumes for the region. Note, for example, the volume of traffic to Ely is equivalent to the volume on the TransCanada Highway at Kenora.

Fig. 9 shows approximate travel time to Fort Frances. Note the significant volumes of traffic within 1.5 hours of Fort Frances.

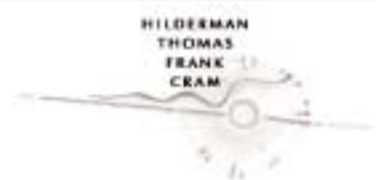
Sunset Country currently appeals to only a small percentage of the Minnesota market. Trips to Sunset Country appear to be substantially less expensive than trips to Minnesota. There is a significant market within 1.5 hours of Fort Frances.

Fort Frances Sport Fishing Centre



Source:
 • Minnesota Department of Transportation, 2000 data
 • Ontario Ministry of Transportation, 1990 data

Average Annual Daily Traffic Volumes



Landscape Architecture • Planning
 100-1113 Lakeside Avenue East, Winnipeg, Manitoba R2S 0P1
 Telephone: 204-944-9407 Fax: 204-944-9407

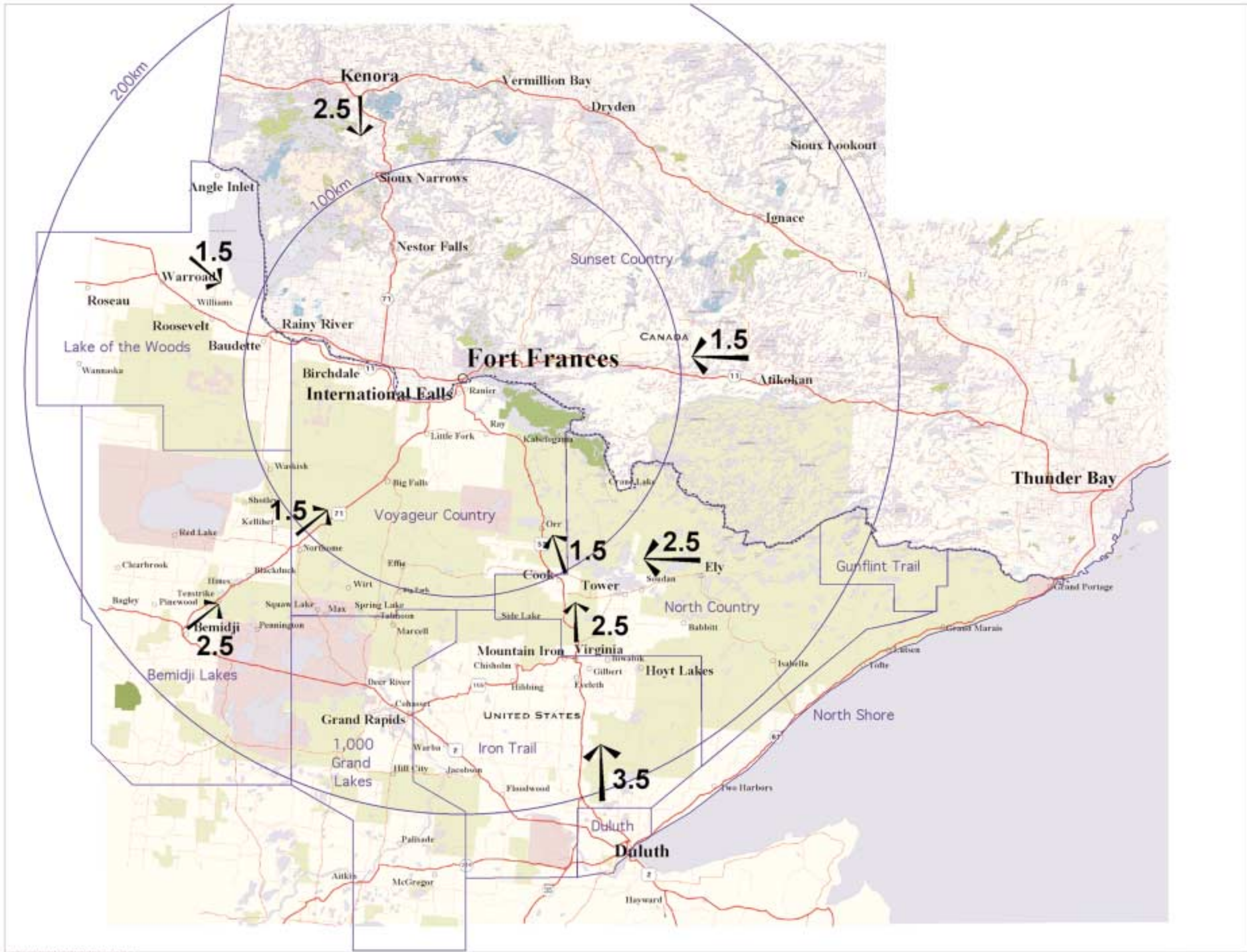


Oct. 23, 2001

Figure 8

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Fort Frances Sport Fishing Centre



Legend

- Travel Time to Fort Frances (hours)
- Tourism Regions

Source: Minnesota and Ontario travel directories

Travel Time and Tourism Regions

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Oct. 23, 2001

Figure 9

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4.4 Comparative Attractions

Other Major Attractions

For comparative purposes, Table 6 identifies other regional attractions in both the United States and Canada. The chart identifies, for each one of the attractions the location, size of facility, annual visitation, capital costs, operating costs, owner and management structure, mandate, operating season and community impact.

While reviewing the chart, it is imperative to consider all factors that may or may not effect the facility, such as highway location, marketing efforts and longevity of the institution. For example, the Great Lakes Aquarium is located adjacent to Interstate 35 in Duluth and has an annual visitation of 350,000. Not only is the Aquarium in an excellent location, but it also employs an entire marketing team.

Old Fort William in Thunder Bay also has impressive visitation of 100,000, but has been established for more than 20 years. However, even though Old Fort William is a huge and highly respected tourism destination experience, it only attracts about 30,000 U.S. visitors per year. Grand Portage National Monument is located in the United States less than one hour south of Old Fort William. It attracts 75,000 visitors to a much more modest show about the same theme. People will drive up the highway to visit Grand Portage National Monument but they will not cross the border for a much more interesting experience. Old Fort William is currently researching this anomaly.

As evidenced from the chart, the majority of major attractions in the region (Sunset Country and Northeastern Minnesota combined) are located in the United States. Visitation numbers for U.S.A. attractions are much higher due to good marketing and proximity to larger populations. The United States has developed some interesting and amusing attractions that keep residents and visitors from searching out additional attractions. Attractions in Canada are further away and a hassle to get to.

Table 6 - Fort Frances Fishing Centre Comparable Facilities

Name	Ironworld Discovery Center	North Shore Commercial Fishing Museum	International Wolf Center	Great Lakes Aquarium	United States Hockey Hall of Fame	Spilt Rock Light House	National Fresh Water Fishing Hall of Fame	Fort Frances Museum	Kay-Nah-Chi-Wah-Nung Historical Centre	Old Fort William	Discovery Centre at The Forks,
Location	Chisholm, MN	Tofte, MN	Ely, MN	Duluth, MN	Eveleth, MN	Two Harbors, MN	Hayward, WI	Fort Frances, ON	Stratton, ON	Thunder Bay, ON	Winnipeg, MB
Size of Facility	Park Attraction - 40 acres + buildings, amphitheatre, trolley, etc.	1 Building - 48' x 30'	1.4 acres property, 20,000 square foot building	62,000 square feet	10,000 square foot building	Light house on 25 acres	25,000 square foot giant fish	6,000 square feet	15,000 square foot building on 300 acres	44 buildings on 25 acres	8,000 sq.ft.
Annual Visitation	45-50,000 (2000)	3700 (2000)	50,000 (2000)	390,000 (2000)	15,000 (average)	150,000 (average)	100,000 (2000)	9,919 (2000)	30,000 (2000)	100,000 (2000)	150,000
Admission Fee	Adults -\$8.00 Seniors & Students - \$7.00 USA Funds	Adults - \$3.00 Family - \$5.00 USA Funds	Adults - \$5.50 Seniors - \$5.00 Children - \$2.75 USA Funds	Adults \$10.95 Children \$5.95 USA Funds	Adults - \$6.00 Youth/Seniors - \$5.00 Children - \$4.00 USA Funds	Adults \$6.00 Seniors - \$5.00 Children-\$4.00 USA Funds	Adults - \$5.00 Children -\$3.50 & \$2.50 USA Funds	Summer - \$2.00 adults, or \$5.00 family Winter - free CDN Funds	Adults - \$7.00 Seniors -\$5.00 Children - \$3.00 CDN Funds	Adults -\$12.00 Seniors/Students -\$10.00 Children -\$9.00	free
Capital Cost	1977 - approx. 2.5 million 1986 update - 4.0 million USA Funds	\$180,000 USA Funds, however everything was donated	1.5 million USA Funds	34 million USA Funds	2 million (approx.) USA Funds	\$75,000 (1907) USA Funds	1 million (1984) USA Funds	\$40,000 (1978) building donated CDN Funds	6 million CDN Funds	13 million (1973) CND Funds	2.25 million CND Funds
Annual Operating Cost	2.5 million USA Funds	\$10,000 - \$20,000 USA Funds	varies - \$600,000+ USA Funds	5 million USA Funds	\$100,000 USA Funds	-----	\$250,000 USA Funds	\$120,000 CDN Funds	\$600,000 CDN Funds	3.1 million CDN Funds	Unknown
Operating Revenue Sources	Admissions, government grants, gift sales	Community donations	Government support, gift sales, research publications	Admissions, gift sales, facility rental, grants	MN Wild Donations, admissions, grants	Government support	Admissions	Town of Fort Frances support	Grants, private donations band support	Provincial government, grants	Provincial Government Programs by Parks Canada and Tourism Operators
Owner	State of Minnesota	Tofte Historical Society	Not for profit organization, land is owned by Department of Natural Resources	Building - State of MN Operations - Not for profit group	Not for profit	Minnesota Historical Society	Not for Profit	Town of Fort Frances	Rainy River First Nations	Province of Ontario	Province of Manitoba
Management	Facility of Iron Range Resources & Rehabilitation Agency Board (IIRRB)	Not for profit museum board -no director -no employees	Board of Directors - Executive Director, Assistant Director, Staff	Board of Directors - President - Executive Director - Staff	Board of Directors - Director - staff	Minnesota Historical Society – Site Manager	Board of Directors – Executive Director	Town of Fort Frances - Curator - staff	Chief & Council - not-for profit board - Executive Director, Staff	Min. of Tourism – General Manager	Tourism Manitoba
Mandate	Preserve & provide access to rich history and culture of the Iron Range	Preserve the heritage of early settlers who made their living by commercial fishing	Supports the survival of the wolf around the world by teaching about its life, its association with other species and its relationship to humans	Capture the wonder and excitement of Lake Superior. Create understanding of worlds large lakes	To provide American hockey at all levels with a hall of fame that captures the true spirit and excitement of the sport it represents	To preserve Great Lakes shipping and lighthouse history	Collect, preserve and display artifacts of the sport of freshwater angling	Preserve the history of Fort Frances	Preserve, present and protect Ojibway culture, heritage and history	To serve as a cultural, heritage and tourism resource & play a leadership role in tourism	Tourism Info Centre Interpretation of cultural and resource based tourism in Manitoba
Operating Season	May - September (research open year round)	Year Round	Year Round	Year Round	Year Round	Year Round	Year Round	Year Round	Year Round	Reg. program- May-Oct. Educational programs year round	Year Round
What kind of Impact on Community	-Employs 60 people in high season, 20 year round - good employer -5.5 million economic impact in region	-Brought a sense of community by donating entire museum -pride because of a good place to send visitors -leverage for additional grants	-Visitors come to see center from all over the world -world class attraction -long standing natural attraction -boost to existing businesses	-Increased tourism -added destination -70 full time employees -estimated ec. Impact is 5.2 million/year -more than 170 rooms have been added in Duluth because of Aquarium	-excellent local attraction	-Employment opportunities	-source of pride – publicly supported	-downtown business - good winter location	-sense of pride for local and extended community -increased tourism for entire region -various employment opportunities -educational experience for school groups	-10 million dollar direct economic impact	
Comments from facility managers	-heavily subsidized -have a hard time focusing on business when its a cultural facility -as a State agency, they cannot give charitable receipts for donations -frequently lease properties & buildings to subsidize operations	- part of building is a tourist information centre -no employees - space is rented out to Tourist Information -being on highway is a necessity -land was also donated -operations supported by rent, memberships & gift sales			-funded by admissions, gift shop sales, donations, hockey games, MN Wild donations				-highway presence would increase visitation -more initial marketing required i.e. for billboards, distribution networks, mass media buys		- use of theatre, rental program and programming by other organization brings in a more diverse crowd

4.5 The Effects of September 11, 2001

Since the United States of America was attacked on September 11, 2001, the tourism and travel industries are reporting drastic reductions. Major airlines and other industry leaders have been laying off employees and reporting serious side effects from the attack. Border crossing numbers are down, and the inspection process for persons entering Canada and the United States has been upgraded. The long term effect of the attack is unpredictable.



5.0 Opportunities for a Canadian Sport Fishing Centre

Canada in general, and Sunset Country in particular possess attributes for freshwater fishing that are not available in the continental United States, the Americas and most other regions of the world. The combination of physiography, scenery, climate, access and intensity of use provide fishing experiences that are uniquely Canadian.

The Great Canadian Freshwater Sport Fishing Centre can be the place to celebrate these attributes and to promote sustainable sport fishing in Canada. Fort Frances, as one of the major entry points for anglers into Canada and being located adjacent to the heartland of American sport fishing would be an appropriate location for such a venture. This role has not yet been taken up in any major way in Canada. The only institution that currently promotes Canadian Sport Fishing in any significant way is a private web-site <canadiansportfishing.com>.

In keeping with the projects objectives, the focus of the Centre would be to provide information to differentiate and brand the "Canadian Experience". Target audiences would include:

1. 75,000 residents of Sunset Country
2. 280,000 residents of Northern Minnesota
3. 200,000 American anglers who visit Sunset Country each year
4. 1.5 million anglers (age 16 and over) who fish in Minnesota
5. 8.2 million anglers (age 16 and over) in the North Central United States
6. The small but growing numbers of international visitors to the region
7. General tourists to the region.

The content of the Sport Fishing Centre should emphasize the special and unique attributes of the "Canadian Experience" in packages that are fun, dynamic, interesting and fresh. Subject areas could include:

1. Fish species, sizes, characteristics...
2. Habitat and structure
3. How to catch fish
4. How to enhance and preserve habitat
5. Special people
6. Special fish



7. Tools, toys and gizmos
8. Collections
9. Secrets....

This content can be provided at a whole range of scales, intensities, frequencies, duration and complexities. Determining the appropriate level and type of development will be based on what is necessary to attract the target audience in a fashion that is financially sustainable and intellectually and emotionally compelling.

One of the major objectives of the Centre is to raise the profile of Fort Frances and to attract new visitors to the Town and the region. The following describes ways in which a Sport Fishing Centre can address this objective and the other core objectives of the organization.

5.1 Capturing Existing Angler Visitors

(±200,000 non-resident anglers annually)

Existing angler visitors are typically "people on a mission". They are intent on getting to their destination and they are not easily distracted. Their destination is not Fort Frances, rather some lodge or resort down the road and after a week in a boat, their destination is home. These people may stop in Fort Frances now for tourist information, currency exchange and duty free shopping. They may also stop for liquor, beer, gas, bait, licenses and McDonalds. It is unlikely that they would easily be distracted from their mission exclusively to visit a Fishing Centre Attraction.

Location and access is the critical factor in attracting this group. It would be possible to capture visitation from these existing angler visitors if a Sport Fishing Attraction were associated with the Ontario Travel Centre where many people already stop.

Because of its proximity to the international border, the Fort Frances Travel Centre is highly visible. The Centre has also traditionally provided great marketing. Current visitation to the Ontario Travel Centre in Fort Frances is ±125,000 / year - a ready market for a Sport Fishing Attraction. Many of these existing visitors could be directed to the Fishing Centre as part of their visit. In turn, the Sport Fishing Centre could make a visit to the Travel Centre more attractive. These existing visitors are not likely to make more than one stop on the way to or from their destination, so that the Fishing Centre and Visitor Centre need to be either attached or adjacent to one another. This concept would further be enhanced if Duty Free, Currency Exchange, Liquor Store, Beer Store, etc., other places where visitors often stop, were also associated.

The interpretive messages and presentation formats can be tailored to the interests of this group and to the anticipated duration of their visit. Messages would need to be relevant to their own experiences (ie. how to catch more/bigger fish using tools, techniques and toys, who caught what with what technique, etc.) and presented in a short period of time to accommodate a hectic travel schedule. As well, visitors would be attracted by the prospect of receiving something for their visit such as an "official" recognition of their catch or posting on the Centre's board or web-site. Content would need to change regularly to continue to be of

interest to repeat visitors. Such changes would not need to be very significant, but enough in order to remain fresh and interesting year after year.

5.2 Capturing Visitation from Local and Regional Resident Populations

(±350,000 people within 3 hours drive)

An interesting and compelling interpretive experience will draw residents to visit once and perhaps to return to bring their friends and relatives when they come to visit the area. Fixed exhibits and attractions have a limited appeal to residents. Changes in content of interpretive displays of a magnitude significant enough to attract frequent repeat visitation from this group would not likely be practical.

Programming is the key to maintaining an ongoing relationship with regional residents. Seminars, lectures, workshops, conferences, demonstrations and fish symposiums on topics of both broad and specialized interest can achieve many of the objectives of the Centre. These programs can be delivered in Fort Frances at a purpose built facility, in existing halls or as an outreach service to be delivered to where people live. Programs can also be offered on the internet. Such programs serve both as a core product of the Centre as well as a marketing tool for the Centre's other products.

School programming is a major component of many Interpretive Centres. Programs designed for a particular grade level and curriculum can ensure ongoing annual visitation. While the regional market for school tours is small, this would be a critical component necessary to nurture the next generation of responsible anglers.

The most necessary requirement for successful programming is a dynamic and knowledgeable person responsible for its design and delivery. As such, any development planning must ensure adequate resources for such a dedicated position.

The provision of a purpose built program space as part of a Fishing Centre Attraction has many potential benefits. Intensive use of a facility creates pride of ownership and greater exposure of new and existing

displays. Revenue can be generated by memberships which provide access to programs. Attendance at a facility will support gift shop sales and could contribute to additional traffic for adjacent businesses, and a multi-use facility can generate rental revenue for other public and private events. A multi-purpose program space should be considered under any development scenario.

Other attractions that would appeal to this group include camping and RV accommodation, outdoor amenities such as walking paths, beach, picnic areas and other family activities.

5.3 Attracting New Visitors to the Region

The Sport Fishing Attraction is envisioned as one component of a multi-faceted travel and vacation experience. Its purpose is to add value to a trip that may include angling, eco-tourism, education, visiting friends and relatives, or general travel. As such the Fishing Centre will be a partner with other destinations and activities. These include existing Canadian attractions such as Kay-Nah-Chi-Wah-Nung Historical Centre and Old Fort William and events such as the International Bass Tournament and local festivals. Partners could also include American destinations such as Voyageurs Park, Lake Vermilion Casino and the International Wolf Centre. Joint marketing and promotion with these groups can benefit both parties and incrementally increase participation overall.

As well, the Centre could provide a catalyst to the development of new tourism products in Fort Frances. There are currently few, if any compatible products. New products may include tours or outdoor adventures that combine a visit to the Centre with another complimentary experience. New accommodations such as interesting bed and breakfast or luxury suites can be provided to support these visitors. The Centre could also provide a benefit to promoting shopping trips or weekend getaways that combine a visit to the Centre with a special program or other event. In this way, the Centre can contribute to attracting new visitors to Canada other than exclusively anglers.

New visitors could be day visitors or destination visitors. Day visitors would come to Fort Frances as part of a trip to Northern Minnesota or Sunset Country in Ontario. They would visit the Fishing Centre, shop, eat

and return to their resort. Destination visitors could add a visit to Kay-Nah-Chi-Wah-Nung Historical Centre, tours of other local and regional museums and attractions, and a nature or adventure tour to their trip.

The most readily available market for these new visitors is people who are already visiting the area. Northern Minnesota is a major vacation destination in the United States and a logical first point of attack. Attracting additional visitors from Northern Minnesota and elsewhere will be a difficult challenge due to the reputation of the border, but the potential rewards are significant. Key ingredients would include a Fishing Centre offering a first rate experience, a private sector providing first rate services, and lots of additional public amenity such as easy access, parks, pools and trails. Extensive marketing would be needed to expose these products to the U.S.A. market. This kind of complete makeover could provide a significant anchor to a Fort Frances / Thunder Bay circle route (a.k.a. Old Road) and benefit the entire region.

The existing, previously documented problems with the border crossing, Canada and US Customs and bridge toll are major obstacles to developing new markets from south of the border. These issues need to be addressed and resolved before meaningful headway can be made in promoting new visitation. There is currently no indication that these issues will simply go away in the short term. A long term strategy needs to focus on dealing with these issues by use of effective marketing that will sensitize visitors to what they will experience and convince them that it is not as bad as they have been led to believe. Outreach programming, as described above, delivered at Minnesota resort areas, sporting goods stores (ie. Cabela's, Bassmaster...) and sports shows could be an effective tool to this end.

5.4 Facilities, Scale and Content

The size and content of a facility needs to be geared to anticipated use and the potential sources for capital and operating funding resources. Modest facilities are less costly to build and maintain but may have less to offer visitors thus limiting the duration and frequency of use. More major facilities cost more but have more to offer. As previously stated, all interpretive facilities require a significant level of public sector investment for operating. Earned revenue (admission, memberships, program fees, etc.) typically accounts for only a small portion of operating costs.

A modestly sized Sport Fishing Centre would address the needs of existing visitors and local residents. A facility of between 4,000 and 6,000 square feet in size can provide one significant gallery, a venue for broader information and display and a small multi-purpose/theatre space and a gift shop. This scale of facility can provide an interesting experience of short duration (± 1.0 hours) and serve as a venue for programming. This scale of facility, together with a significant programming effort offers an immediate opportunity to achieve the majority of project objectives. It would not however serve as a significant attraction to new visitors.

Major facilities, such as to Kay-Nah-Chi-Wah-Nung Historical Centre, International Wolf Centre, Old Fort William, Fort Whyte Centre, Ironworld etc. are expensive to build and expensive to operate. They offer various exhibits and programs requiring operating budgets of several hundred thousand to over a million dollars. Centres of this scale require paid visitation of 50,000 to 100,000 as a minimum level of interest to warrant ongoing investment in operations. They are often destination attractions providing interesting experiences of several hours in duration. A larger facility of this scale would assist Fort Frances in attracting new visitors.

It does not appear that a Sport Fishing Centre in Fort Frances could attract this level of visitation in the short term given the current border issues. The opportunity to develop a major facility is still some distance in the future. The development of significant programming, management and marketing capabilities will be the big step in moving towards this objective.

5.5 Site Locations and Synergies

Opportunities regarding location and associations are dominated by two major considerations; Firstly, a major Sport Fishing Centre must be associated with water and a "Canadian" Sport Fishing Centre must reflect the landscape and image associated with the "Canadian experience". Secondly, the opportunity to develop in association with a new Ontario Travel Centre is limited to the Downtown area by OTC criteria. As such, these two considerations are mutually exclusive.

Waterfront sites:

The project terms of reference identify the Sorting Gap Marina area as the candidate site for a Sport Fishing Centre. From Canada Customs, traffic could be directed east on Church Street, then south on Victoria Avenue to Front Street. Although the landscape of the river front ties in with the concept of a Sport Fishing Centre it is not representative of the landscape of the Canadian experience. As well, due to size limitations this area has little immediate potential for development of site amenities at this time. The Abitibi wood yard is a sizable parcel of land that may become available in the future. This parcel, or a portion of it could be suitable for development. There is however no commitment at this time by Abitibi to make the wood yard available.

Current site conditions at Sorting Gap would permit development of a modest sized stand alone facility. Development and operations costs would be higher and visitation lower for a stand alone facility compared to a facility shared with a new Travel Centre.

Development of a major attraction at this location would be possible once the woodlot has been relocated. This larger site could be landscaped and developed to offer all of the services and landscape attributes necessary for a compelling attraction.

Pithers Point Park offers perhaps the most attractive location for a Sport Fishing Centre. The area can accommodate many related amenities including walking activities, beach activities, picnicing and camping. It provides walking access to the Fort Frances waterfront and Sorting Gap marina area. It also possesses landscape attributes of rock and trees that are typical of the image of Canada. Access to the park is quite simple, but

somewhat out of the way for westbound travelers. The Park is however well suited for development of a major attraction.

Pithers Point is Indian Reserve land that has been leased by the Town. That lease expires in 2009. This site offers the opportunity to develop a joint First Nation - Town project. First Nations have indicated an interest in exploring such a partnership.

Downtown sites

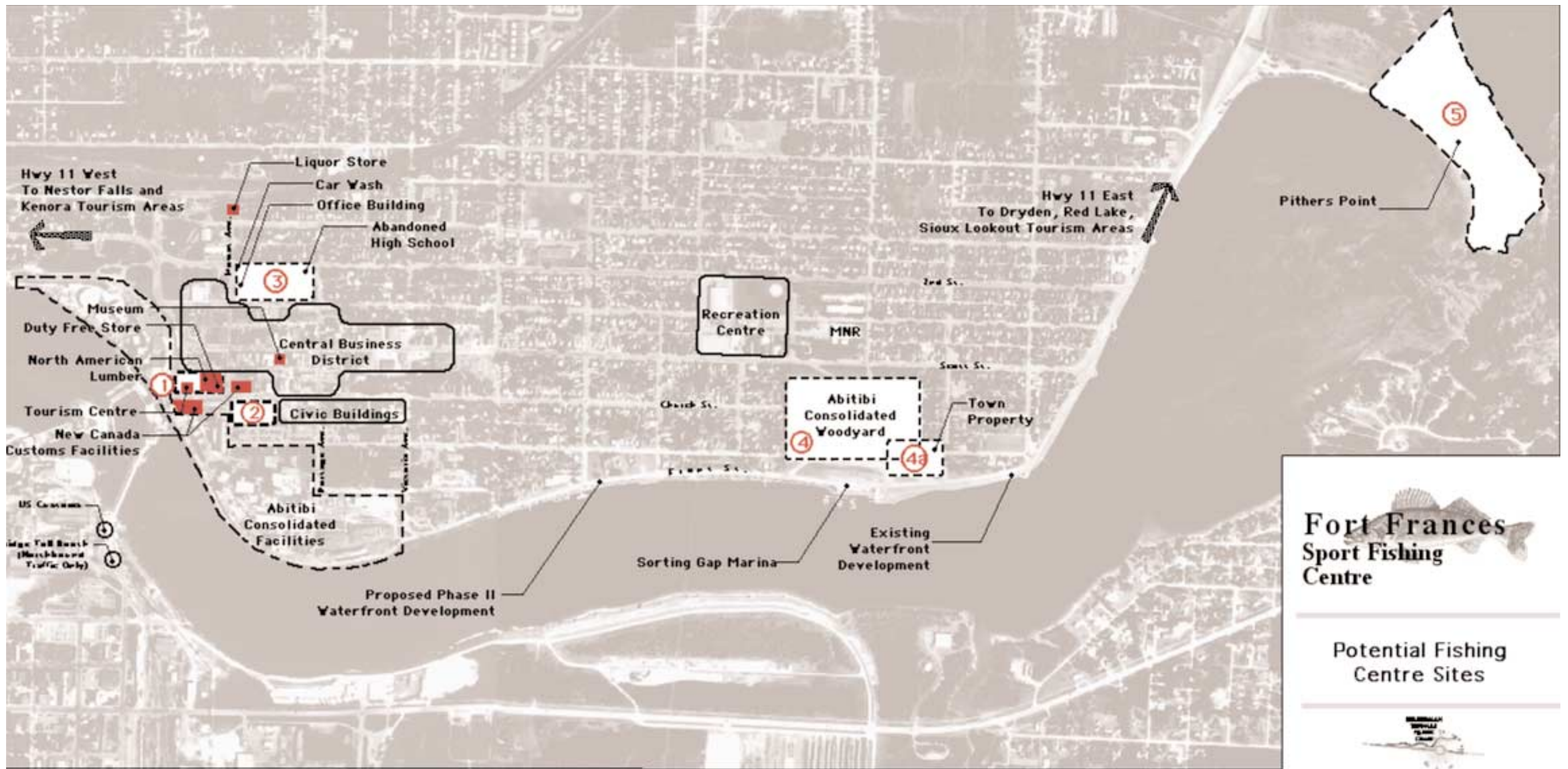
There is an opportunity for the Sport Fishing Centre to partner with the Ontario Travel Centre in developing a new joint facility. The Province of Ontario is currently considering development of a new Travel Centre in Fort Frances. Redevelopment of the Canada Customs Facility at the border will direct traffic away from the existing Travel Centre. As well, the existing Travel Centre is of an older design and no longer meets Ministry of Tourism criteria.

Travel centres in Ontario have guidelines for development including ample parking, a requirement for sport fishermen many of whom are driving large trucks and pulling boat trailers. Travel centres are also considerate of landscaping, visibility, staff quality and other features such as spacious washrooms, storage space and currency exchange.

Potential locations for a new joint facility are few. Fig.10 illustrates possible locations including: expansion of the existing Tourism Centre site, a new site on Church Street, a new site on Mowat Avenue and the old high school site. Other site may be possible subject to land assembly.

The Church Street locations and Mowat Avenue locations offer the best opportunity to capture and direct visitors to downtown Fort Frances. Either the expansion of the existing site or development of a new site east of the new Customs Facility would provide appropriate access and visibility for American visitors as they arrive or depart the country. Extensive streetscaping and signage would be necessary to direct visitors to the Central Business District. The objective would be to have visitors leave their vehicles at the Centre and walk to downtown.

A 1987 masterplan by Boise Cascade, Fig.11, illustrates a wide ranging



① Existing Tourist Information Site with North American Lumber and Duty-Free ± 1.1 acre

② Church St. ± 1.6 acre

③ High School (Office building, Car Wash, Licence building) ± 4 acre

④ Wood Yard ± 20 acre

④a Town Property ± 2 acre

⑤ Pithers Point ± 25 acre

Fort Frances Sport Fishing Centre

Potential Fishing Centre Sites



Oct. 22, 2001

Figure 10

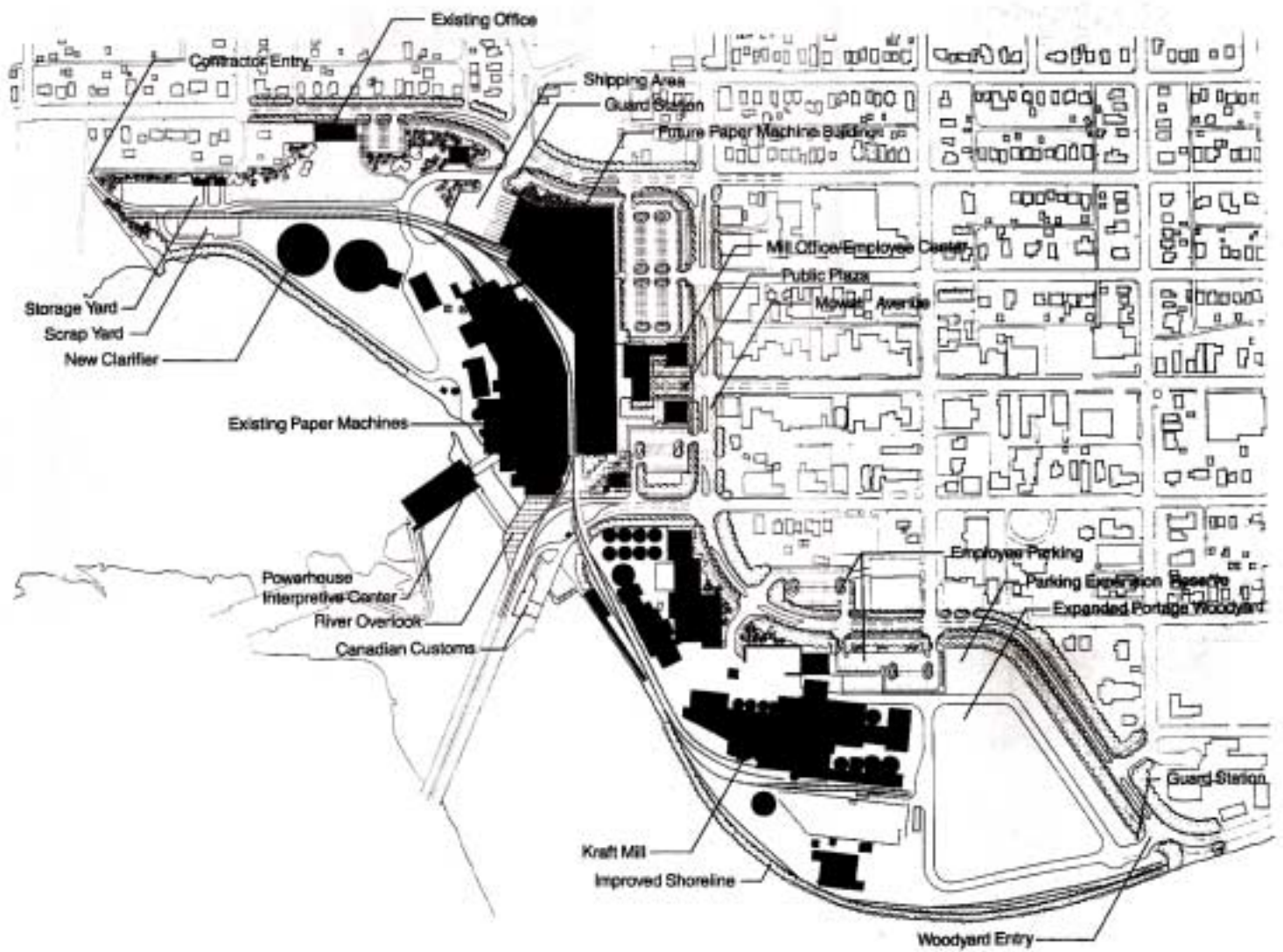


Figure 11

Boise Cascade Canada Masterplan

Source: Fort Frances Mill Masterplan,
Boise Cascade Canada, 1987



development concept. It includes a public plaza and visitor centre located at Mowat and Scott, ideally located to provide access to the Central Business District. This plan was never seriously pursued, but it illustrates the type of redevelopment that may be possible.

Another alternative location for a combined Tourism and Sport Fishing Centre is the old high school site on 2nd Street at Mowat. Developing the Centre in this location would require that the office buildings and car wash adjacent to the high school be procured, so that the entire block was dedicated to the Centre, site amenities and parking. The advantage of this location is direct and easy access to Highway 11, east and west. In order to easily flow traffic from Canadian Customs (existing visitors) to this location, it is recommended that Mowat Avenue be turned into a one way street heading north. Visitors to the centre would also have easy walking access to downtown.

5.6 Funding Opportunities

Funding for development and ongoing operation and maintenance of a Fishing Centre will be necessary. All of the comparable interpretive facilities reviewed rely on outside funding for both development and operation. Admission revenue, memberships, facility rental, gift sales, fundraising, etc., typically account for only a small portion of costs, approximately 25% - 30%. A number of possible sources of outside revenue are described below.

Non-resident fishing license revenues are a potential source of funds. It is estimated that approximately \$5,500,000 is generated in non-resident fishing license revenue in the Sunset Country region each year. This represents approximately 1/3 of all non-resident fishing in Ontario. This revenue goes into a special purpose account. The Ontario Fish and Wildlife Advisory Board, a citizen board, is the watchdog for these funds, and gives recommendations to the Minister of Natural Resources on how to use the revenue. The Fishing Centre would be an excellent opportunity towards promotion and preservation of the resource and a worthy candidate for funding in this fashion. It is suggested that this funding be pursued on an annual basis, as the primary source of revenue for on-going operational funds for the Centre.

There are other funding opportunities currently available in the Ontario provincial system including the Ontario Heritage Fund, SuperBuild, Living Legacy Trust and others. As well, there is also an opportunity for a greater federal presence in the Fort Frances region with regards to the natural environment and tourism promotion. Fisheries and Oceans, Environment Canada and Natural Resources Canada both play an important role to play in promoting and sustaining the "Canadian" experience. They too are potential partners in a Canadian Sport Fishing Centre.

Private sector participation may also be possible. Sporting goods manufacturers and retailers of fishing equipment, marine equipment, trucks, campers, photographic films, and brewers have a history of sponsoring facilities, programs and displays. Contributions of goods and services are typically easier to obtain than cash. Businesses are interested in the benefit they will receive as measured by cost per 1000 exposures. In this respect, sponsorship of outreach programs and internet products that reach more people than could possibly attend the Centre could be very appealing.

Private foundations frequently contribute to institutions with a strong community base and a potent message. The Sport Fishing Centre will promote fishing as a sustainable and environmentally sensitive activity that supports sound values. Potential interest amongst private foundations would need to be explored.

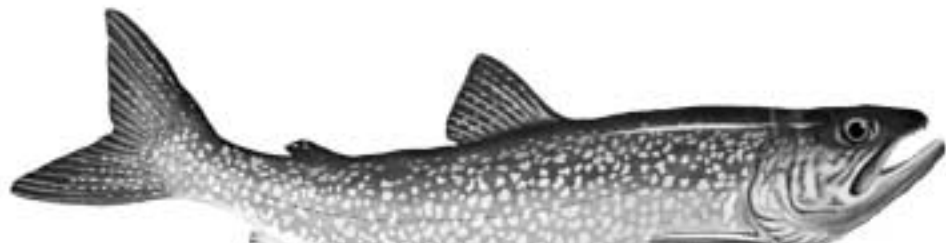
Partnership with the local and regional tourism industry would benefit both parties. Contributions by industry to joint marketing and promotion activities, including outreach programs, may be possible.

Effective networking is the key to funding success. It is also the key to disseminating the Centre's messages regarding the love of fishing, habitat preservation and enhancement, etc. As with programming and marketing, networking with allied institutions and organizations will need to be a core activity of the Centre.

5.7 Structural Organization of the Sport Fishing Centre

The Sport Fishing Centre is currently incorporated as a *not for profit organization*. Following is a brief description of the elements of an appropriate organizational structure:

1. Board of Directors - responsible for the overall mandate of the Centre
2. Advisory Board (anglers, manufacturing and retail industry, service industry, marketing, conservation, etc.) A committee which gives written advise to the Board of Directors on the state of the industry and local businesses.
3. Executive Director - this individual will be a dynamic combination of educator and marketer, and will report directly to the Board of Directors. This person is responsible for daily operations of the Centre, including programming (in-house and outreach), marketing and liaison with local community.
4. Support Staff - all support staff will report directly to the Executive Director.



6.0 DEVELOPMENT PROGRAM RECOMMENDATIONS

Based on the existing conditions in Fort Frances, it is recommended that a phased program be considered for the Great Canadian Freshwater Sport Fishing Centre. Phase One would establish a basic facility and build capacity to provide top notch programming, marketing and networking. This first phase would grow into a major regional attraction as capacity grows and border conditions (or at least, the perception of border conditions) change. Phase Two would include the development of a major interpretive facility including site development and associated amenities at either Pithers Point or at the Abitibi wood yard.

The Centre would begin by taking advantage of the immediate opportunity of partnering with a new Ontario Travel Centre, which the Ministry of Tourism and Ontario Realty Corporation are considering. The Sport Fishing Centre could design space associated with the new facility, which would be adequate for initial programming and exhibits. By developing the Centre in this manner, it will strengthen community capacity to move on to a second phase. Development of a major attraction can be considered when the conditions both internally and externally, are right to do so.

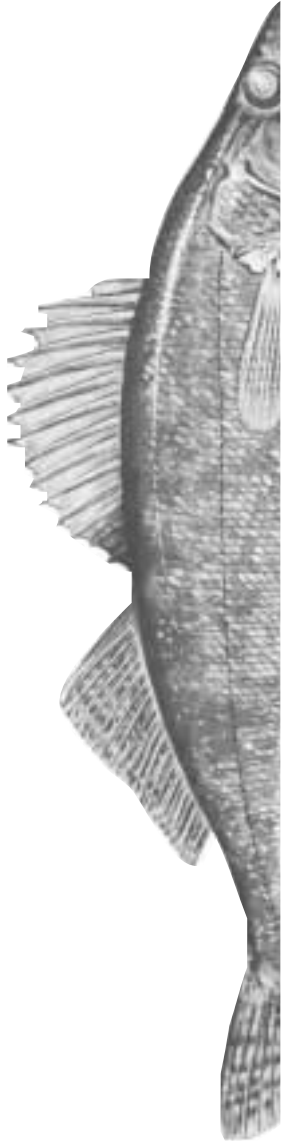
The following describes the basic components of each phase of development.

Phase I: Self Guided Interpretive Centre associated with a new Ontario Travel Centre

The Mission of the Centre in Phase I will be to position Fort Frances as the Gateway to Freshwater Sport Fishing in Canada and to permit the growth of an institution with a significant physical presence and ample resources to promote the preservation, enhancement, development and enjoyment of freshwater sport fish in Canada.

The Centre will:

1. Offer exhibitions and programs that address critical issues regarding the sustainability of the Canadian Sport Fishing Experience;



2. Offer exhibitions and programs that address the unique attributes of the Canadian Sport Fishing Experience; and
 3. Offer outreach programs to maintain and enhance sport fishing in Canada.
- Target market: Local and regional residents, existing drive through anglers and incidental other visitors. Outreach to Americans in Minnesota;
 - Estimated visitation: Order of magnitude of $\pm 50,000$ - 60,000 (about half of Tourism Centre visits);
 - The Centre would serve as a 'lure' to Fort Frances and charge a small admission fee or none at all. Programs could be provided on a fee basis or by membership;
 - Facility size: $\pm 4,000$ sq. ft. in addition to Travel Centre requirements. Include exhibits, ± 60 seat theatre/multi purpose room and gift shop;
 - Site size: as required for Travel Centre parking and other related amenities. Lots of room for pickup trucks hauling boats to park;
 - Location: near the new Canadian Customs facility. Adjacent to or in the central business district;
 - Program: focus on quality of sport fishing, big fish, lots of fish, hall of fame, contests, information from regional lodges (including U.S.A.), hot fishing colours of the week, information on regulations, explain why Canadian lakes are different from U.S. lakes (nutrient, water temp, etc.) and how fish are different. The Centre would define the "Canadian Experience";
 - Seasons: mostly summer visitation as per Visitor Centre. Focus on off season outreach programming;
 - Partners / linkages: downtown business community, regional lodges, Sunset Country Tourism Association, Northern Tourism Marketing Company, Fort Frances Chamber of Commerce,

International Falls Chamber of Commerce, Old Road Initiative, M.O.M.'s Route, fishing goods manufacturers and suppliers, federal and provincial agencies, not-for-profit environmental groups, Fort Frances Bass Tournament, etc.;

- Marketing requirements: basic requirements to support the facility are modest. Plan for more extensive marketing with regional partnerships;
- Capital costs: allow \pm \$750,000.00 for exhibits and fit-up plus a contribution of \pm \$800,000.00 to capital costs for building and site;
- Operating requirements: share floor staff with Tourism Centre;
- Operating costs: building operation, marketing, administration, executive director and contract program staff. Budget of order of magnitude of \pm \$ 200,000 per year;
- Management requirements: one executive director or "keeper of the fish" to look after programming, marketing, networking and operations;
- Organizational requirements: can be overseen by a knowledgeable volunteer board.

A major benefit of this type of facility concept is that it provides a opportunity to develop markets, contacts and experience that can be used to expand into a much larger attraction (i.e. stand alone facility.) It provides enough critical mass to permit Fort Frances to be able to position itself as "The Gateway to Canadian Sport Fishing."

Phase II: Major Tourism Attraction

In Phase II the Mission of the Centre will expand to include gathering significant collections and exhibits to support the original mission. The Centre will become known as a major attraction to all sport anglers who are curious or passionate about the Canadian Experience. A major facility and grounds will be necessary to fulfill this mission.

- Target markets: Local and regional residents, existing drive through anglers, existing Northeast Minnesota tourists and new destination travelers in combination with other regional attractions.
- An admission fee would be charged, equivalent to a facility like Old Fort William or Wolf Center;
- Estimated visitation: Order of magnitude of $\pm 50,000$ - 60,000 annually;
- Facility size: 15,000 -20,000 sq. ft. (i.e., size of the International Wolf Centre or Kay-Nah-Chi-Wah-Nung Historical Centre);
- Site size: size to permit ample parking and significant future expansion. Possible consideration of a major outdoor component consisting of pond displays (a fish park), swimming / play areas, RV camping, trails, amenities, etc.;
- Location: preferred location at the Sorting Gap Marina / woodyard site, to permit linkage to Sorting Gap Marina and waterfront and to provide sufficient space for park development. The old high school site provides another opportunity. Not being adjacent to a waterbody is, however, a significant disadvantage;
- Program: interactive displays and activities for all ages. Focus on lures and equipment and on habitat. "Think like a fish" would be the major theme. It would have a major public education function. It would also be associated with institutions / governments that conduct research, and serve as a library / research centre;

- Seasons: year round programs, with highest visitation being in the summer;
- Partners / linkages: downtown business community, regional lodges, Sunset Country Tourism Association, Northern Tourism Marketing Company, Fort Frances Chamber of Commerce, International Falls Chamber of Commerce, Old Road Initiative, M.O.M.'s Route, fishing goods manufacturers and suppliers, sport fishing media groups (i.e., Canadian-sportfishing.com), federal and provincial agencies, Fort Frances Bass Tournament, etc.;
- Marketing requirements: significant;
- Capital costs: allow \$10.0 million (building: \$4.0 million; site: \$1.5 million; fish park: \$1.0 million; exhibits and displays: \$3.5 million);
- Operating requirements: offices, staff, travel, marketing, outreach, display development, program development, expansion and maintenance of collections;
- Operating costs: allow minimum \$750,000 annually (similar to Kay-Nah-Chi-Wah-Nung Historical Centre).
- Management requirements: significant - experienced personnel essential.
- Organizational requirements: very knowledgeable board.

Table 7 illustrates the ability of each component to address the objectives for this project. It is apparent that the proposed Phase I, coupled with an effective public education program, can meet many of the project objectives. The development of Phase II will, however, be necessary to achieve everything that the Committee has set out to do.

FORT FRANCES SPORT FISHING CENTRE

Table 7

Oct. 22, 2001

EVALUATION MATRIX - OBJECTIVES vrs. ALTERNATIVES

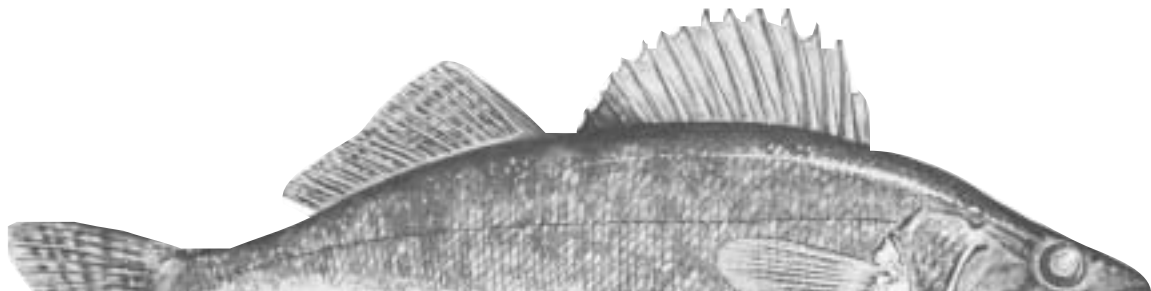
Objectives:	Interpretive Centre with Tourist Centre	Public Education Program	Major Tourist Attraction including programming
1. PUBLIC EDUCATION:			
Foster and promote public understanding and knowledge of Canadian sport fishing;	●	●	●
Foster and promote public understanding and knowledge of the impact of Canadian sport fishing on the environment and the economy;	●	●	●
Gather and maintain information regarding Canadian sport fishing and its impact on the environment and the economy and publish and present this information to the public;	-	●	●
Undertake and/or sponsor research regarding Canadian sport fishing and its impact on the environment and the economy;	-	●	●
Promote citizen action in learning about and responding to issues related to sport fishing; and	-	●	●
Assist local and regional citizen groups to further their objectives in relation to sport fishing.	-	●	●
2. TOURISM ATTRACTION:			
Create attraction that can define Fort Frances as a tourism destination rather than a gateway;	▲	-	●
Create attraction for existing pass thru visitors to stop and visit Fort Frances;	●	-	●
Create attraction to attract new visitors other than anglers, to diversify market;	▲	-	●
Provide product for the M.O.M.'s Route and the Old Road initiatives.	▲	-	●
3. COMMUNITY DEVELOPMENT:			
Enhance the Fort Frances' Waterfront and provide a local amenity;	-	-	●
Support private sector business in Fort Frances;	●	-	●
Provide a focus for marketing;	▲	●	●
Support the regional sport fishing industry and assist it to maintain and enhance its market.	●	●	●

- does not support objective
- ▲ partially supports objective
- supports objective

6.1 Next Steps

Following are a recommended sequence of steps for implementing a phased development strategy:

1. Accept this report and its recommendations for a phased approach;
2. Organize a first Board of Directors with representation from "fish lovers", local business community, regional tourism industry and First Nations;
3. Acquire funding and undertake joint feasibility study with Ontario Tourism Centre to select a site and develop joint development program;
4. Complete a business plan for the Phase I facility to resolve the design, partnerships, financial arrangements and program and interpretive content; include specific consultation with community stakeholders at this stage;
5. Resolve the financial arrangements for implementation;
6. Retain Executive Director;
7. Organize advisory board;
8. Develop the final design of the facility, exhibits, programs and marketing program;
9. Implement phase I; and
10. Begin planning for Phase II.



7.0 CONCLUSIONS

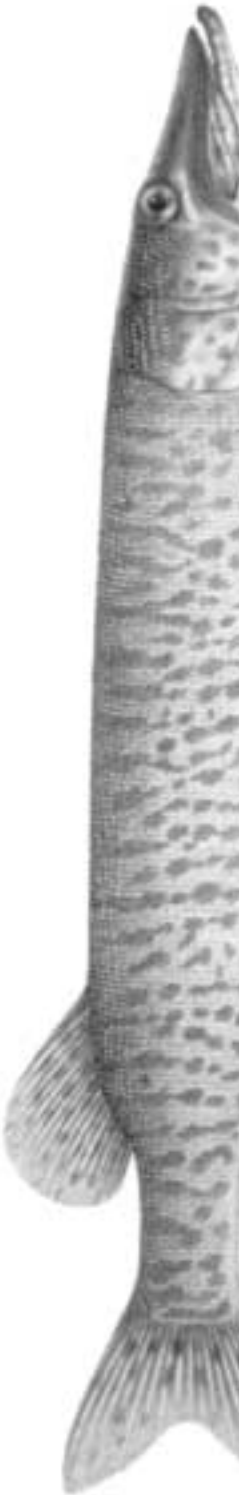
Fort Frances is situated in a prime location as a destination for tourists. It is already viewed as a major gateway for visitors from the Midwestern United States to Sunset Country in Ontario and is adjacent to one of the major sport fishing tourism areas in the United States. The development of a Sport Fishing Centre would permit Fort Frances to brand itself as the gateway to "The Canadian Sport Fishing Experience". As a gateway, the community can develop its reputation as the place where people can find out about this experience, the place where people can get hooked!

With the existing traffic that goes through the town, a modest facility would be viable and sustainable. Such a facility would address many of the objectives of the community.

A major stand alone facility that addresses all of the objectives of the community could be possible subject to resolving outstanding issues. The major obstacle to attracting more visitors from the States and developing a major stand alone attraction is the reputation that the border has gained in recent years. It is imperative that border issues be properly addressed before a major stand alone attraction is considered.

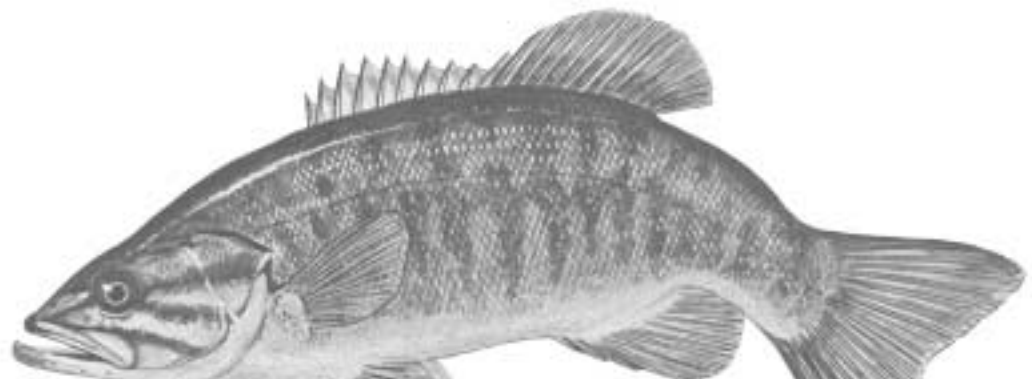
The key target market for a major facility are new visitors from the United States. These are people who are already vacationing or visiting the area but who do not cross the border. Two major reasons are apparent based on recent interviews. Firstly, most Americans perceive or have a real concern about the way they will be treated by Canadian and US customs and immigration officials; what it will cost in bridge tolls and other charges; and how long it will take to cross the border into Canada and back to the United States at Fort Frances / International Falls. Secondly, most Americans are not even curious about Canada. They are completely satisfied with the experiences available in the States. Resolving these issues is a necessary precondition for any future tourism development.

This study was commissioned to evaluate the ingredients necessary to successfully operate a Sport Fishing Centre in Fort Frances. Its findings are that a Centre is important to develop and that it could be viable.



A Freshwater Sport Fishing Centre would be an excellent vehicle for supporting sport fishing in Canada and for contributing to community development in Fort Frances . It would cultivate curiosity about fish, fishing and the personalities who make up the sport. It would make the Canadian experience attainable to more people. It would ensure that the fisheries issues are understood, heard and listened to and be a resource for anglers and conservationists to help support their aims.

A Canadian Freshwater Sport Fishing Centre is a necessary institution. The industry is large, the resources are rich, the market is broad and deep and the story is not being told. Fort Frances is arguably amongst the most important gateways for freshwater sport fishing in Canada and it is the logical site for such a venture.



Appendix 1

List of Contacts

Fort Frances:

- Waterfront Development Committee – John McTaggart, Chair (Sport Fishing Committee)
 - Museum Advisory Committee – Pam Hawley, Curator
 - Economic Development Advisor – Geoff Gillon (Sport Fishing Committee)
 - Manager of Planning and Development – Darryl Allen
 - Business Improvement Area Board of Management – Reinvent Fort Frances Group
 - Chamber of Commerce – Dawn Booth
 - Chief's Council – Tom Bruyere, Ron Allen, Romeo Duguay
 - Couchiching First Nation – Chief Charles Mc Pherson
 - Bass Tournament Committee – Rebecca Webb (Sport Fishing Committee)
 - Kay-Nah-Chi-Wah-Nung Historical Centre – Sam Bombay
 - Planning Advisory Committee – Fay Flatt, Municipal Planner
 - Abitibi Consolidated Inc. – Gord Winik
 - Administrator – Bill Naturkach
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Other Contacts:

- Bill Elliot, Executive Director, Fort Whyte Centre
 - Dave Van Wagoner, Superbuild Corporation
 - Melanie Bradley, Manager, Travel Information Centre, Winnipeg
 - Wasyl Bakowsky, Natural Heritage Information Centre, MNR
 - Salim Sachedina, Canadian Sportfishing.com
 - Barb Hlydsh, Ontario Tourism
 - Gerry Cariou, Sunset Country Tourism Assoc.
 - Brent Tarr, Pure Fishing Canada
 - Randy Hanson, Hanson's Resorts
 - Dennis and Gerry Mc Dougall, Pier North, Morson
 - Gary Allen, Allen's Crow Lake Lodge
 - Judy Bechard, Andy Lake Lodge
 - Mary Ann Booska, Director, Ironworld Discovery Center
 - Mary Ellis Hanson, North Shore Commercial Fishing Museum, Tofte, Minn.
 - Linda Frizell, Office Manager, International Wolf Center
 - David Lonsdale, Executive Director, Great Lakes Aquarium
 - Old Fort William
 - Jane Gillon, MNDM
 - John Van Den Brooke, MNR
 - Bill Danby, MNR
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Appendix 2

