

KENORA, ONTARIO, CANADA



KENORA BOATING SECTOR PROFILE

Invest in North America's Premier Boating Destination



KENORA, ONTARIO, CANADA



For More Information, Contact:
Jennifer Findlay
Economic Development Officer
Lake of the Woods Development Commission
1 Main Street South
Kenora, ON P9N 3X2
www.Kenora.Ca
Jfindlay@Kenora.Ca
(807) 467-2127



Special Thanks

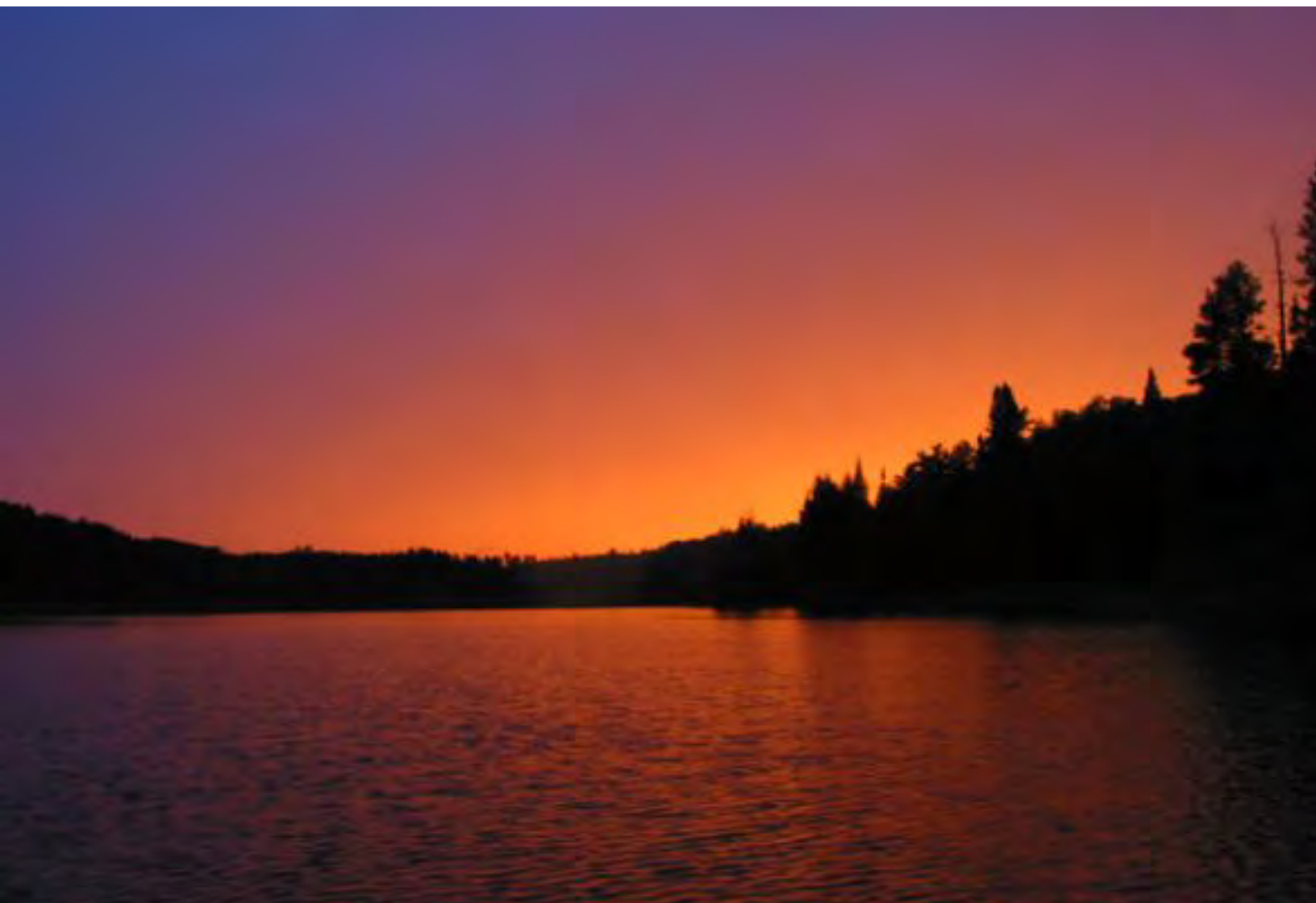
The Lake of the Woods Development Commission and the City of Kenora expresses our thanks to the Province of Ontario's Ministry of Northern Development and Mines and Kenora's Brand Leadership Team, whose support enabled the creation of this sector profile. This Boating Sector Profile serves as an example of the collaborative and supportive relationship businesses enjoy in Ontario.



Table of Contents

KENORA'S BOATING SECTOR.....	5
KENORA'S BOATING ASSETS.....	8
LAKE OF THE WOODS	8
EXPERIENCES THAT BRING BOATERS TO THE LAKE.....	9
<i>World-Class Fishing.....</i>	9
<i>Sailing Adventure.....</i>	9
<i>Power Boat Excursions.....</i>	9
<i>Canoeing, Kayaking, Rowing, and Paddle Boating.....</i>	10
<i>Houseboats.....</i>	10
<i>Heritage Boating.....</i>	10
A CRITICAL MASS OF LOCAL BOATS AND BOATERS	11
NORTH AMERICA'S LARGEST BOATING MARKET	11
KENORA'S BRAND IDENTITY AS NORTH AMERICA'S PREMIER BOATING DESTINATION	14
<i>Investing in the Destination.....</i>	14
<i>Public Sector Investments.....</i>	14
<i>Telling Our Story.....</i>	15
LEVERAGING SOCIAL NETWORKS AND EVENTS	17
KENORA'S BOATER SEGMENTS.....	18
<i>Cottagers and Local Residents.....</i>	19
<i>Regional Day Boaters.....</i>	20
<i>Large Boats Staying for a Season or More.....</i>	21
<i>Cruisers Docking Short-Term in Kenora.....</i>	22
<i>Boaters at Tourist Camps Across Sunset Country.....</i>	22
BUSINESS OPPORTUNITIES IN KENORA'S BOATING SECTOR.....	24
DOCKS AND MARINAS.....	24
BOAT ACCESSORIES AND SERVICES	28
SPECIALTY RETAIL, DINING AND ENTERTAINMENT FOR BOATING VISITORS.....	29
BOAT DEALERS.....	31
BOAT RENTALS.....	31
BOAT AND ACCESSORY MANUFACTURING.....	33
<i>Made in Kenora.....</i>	33
<i>Location Advantage.....</i>	33
<i>Labour Costs and Availability.....</i>	34
<i>Transportation infrastructure.....</i>	36
<i>Industrial Parks and Land.....</i>	37
<i>Other Factor Costs of Doing Business.....</i>	38
OTHER RESOURCES FOR THE BOATING INDUSTRY.....	39
PROVINCIAL AND LOCAL GOVERNMENT SUPPORT FOR BOATING	39
FINANCIAL RESOURCES.....	41
MARKETING RESOURCES	42
<i>Ontario Tourism Marketing Partnership Corporation (OTMPC).....</i>	42
<i>Tourism Northern Ontario (Regional Tourism Organization 13).....</i>	42

<i>Ontario Sunset Country</i>	43
<i>Tourism Kenora</i>	43
LABOUR FORCE	44
<i>Wage Subsidies and the Self-Employment Benefit Program</i>	45
LOCAL ASSOCIATIONS AND NETWORKS.....	46
APPENDIX A: SUPPORTING STATISTICS	48
<i>Electric Service Costs</i>	48
<i>Natural Gas Costs</i>	50
ENDNOTES	54



Kenora's Boating Sector

Boating is more than recreation on Lake of the Woods--it is our way of life. While some places boast statistics that show the high number of households that own a boat, the figure is "flipped" in Kenora--we talk about how many boats each household has--and most households have at least one for every member of the family. Boating is the top attraction for over **20,000 cottagers** who are seasonal residents in the region. Over 93 per cent of cottagers participate in boating, and many launch their boats from Kenora and visit the city throughout the season to access services. Local marina operators estimate that there are approximately **8,000 to 10,000 powerboats and larger sailboats on the lake** each summer in addition to hundreds of paddle boats and smaller vessels. About **1,000 boats are sold into the region each year**, creating a large market for all types of boating-related services.

Kenora's unique position on Lake of the Woods offers boaters access to a freshwater boating experience unlike any other in North America. Fishing boats, sail boats, power boats, canoes, and other watercrafts are found throughout the lake as visitors explore **14,522 islands** covered in pristine Boreal forest. The City of Kenora is committed to the growth of a thriving boating sector, committing over **\$30 million** over the past decade to create assets such as the Lake of the Woods Discovery Centre, a revitalized Harbortown Centre, Whitecap Pavilion (a multi-purpose venue on the waterfront), and a planned boating museum. The local government is also an active partner for new investments, committing land and extending services to support business growth. The city's focus on being a premier boating destination has paid off with over **\$61 million** in private sector investment from 2005-2013, and significantly more planned for 2014 and beyond. A focused and aggressive marketing and branding strategy communicates to visitors that Kenora is **North America's Premier Boating Destination**, attracting a growing number of boaters to Kenora each year.

Credit: Lake Escapes

We invite you to explore how your business can grow in Kenora's expanding boating sector.



Boating Sector Assets, Segments, Targets and Resources







Foundational Assets for Kenora's Boating Sector

<p>Lake of the Woods: 14,500 Islands to Explore</p>	<p>Critical Mass of Over 7.3 Million Boats within a 24-Hour Travel Radius</p>	<p>Strategic Location within a \$5 Billion Regional Boating Market</p>	<p>Kenora's Brand Identity: North America's Premier Boating Destination</p>
--	--	---	--

Kenora's Boater Market Segments

Cottagers	Regional Day Boaters	Large Boats Staying for a Season	Cruisers Stopping Over	Boats Used by Tourist Camps and Guides
				
<p>Demand is being met with room to grow.</p>	<p>More investment is needed to capture this growing market.</p>	<p>Demand is expanding, creating new opportunities.</p>	<p>Services for these boaters are quite limited in Kenora with need for expansion</p>	<p>This established market can be served from Kenora, the region's largest community.</p>

Target Business Development Areas

 <p>Docks & Marinas</p>	 <p>Boat Repair, Accessories, & Services</p>	 <p>Boat Dealers</p>	 <p>Boat Rentals</p>	 <p>Shopping, Dining and Events for Boating Visitors</p>	 <p>Boat and Accessory Manufacturing</p>
---	--	--	---	--	--

Supporting Resources for Success

<p>Provincial and Local Government Support</p>	<p>Financial Resources</p>	<p>Marketing Resources</p>	<p>Labour Force</p>	<p>Associations & Networks</p>
--	----------------------------	----------------------------	---------------------	------------------------------------



Kenora's Boating Assets

Lake of the Woods

Kenora's competitive advantage in the boating sector is its location as the largest community on Lake of the Woods.

With 14,522 islands and more than 105,000 kilometers (65,000 miles) of shoreline, Lake of the Woods is one of North America's most intriguing, diverse, and pristine freshwater lakes for boaters. Lake of the Woods and the vast number of other freshwater lakes, rivers, and streams in the region draw approximately 400,000 boaters a year to Northwestern Ontario.ⁱⁱ Spanning the Canada-US border, the south shore is regular, low, and sandy, while the northern areas--near Kenora--contrast starkly with granite cliffs, interwoven channels, infinite sandy beaches, secluded weed beds, and islands teeming with the wildlife of the Canadian Shield. The Lake's pristine natural surroundings in the Boreal forest and the excellent environmental water quality support a high level of biodiversity as well as excellent fishing.



Lake of the Woods

Key Stats

Total Islands: 14,522

Lake Area: 3,846 km²

Total Shoreline: Over 105,000 km

Tourist Camps and Resorts:

Over 85 on Lake of the Woods,
Over 225 in Sunset Country (Northwestern Ontario), and
Over 150 in Minnesota

Lake Size Rank by Area:

7th Largest Lake in the US
14th Largest in Canada

Annual Person-Visits to the Lake and Northwestern Ontario Region 13c:

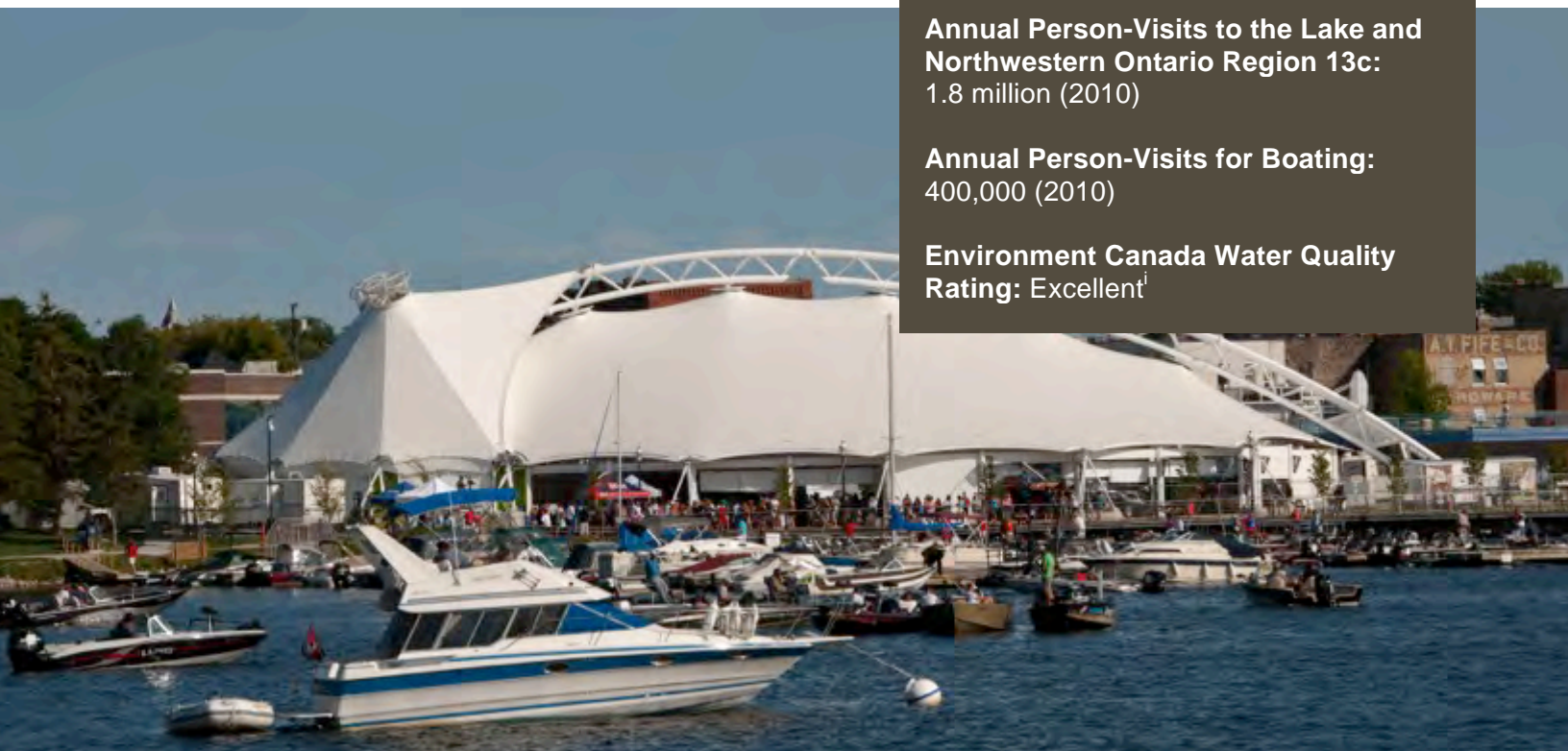
1.8 million (2010)

Annual Person-Visits for Boating:

400,000 (2010)

Environment Canada Water Quality

Rating: Excellent^l



Experiences that Bring Boaters to the Lake

World-Class Fishing

On Lake of the Woods, shallow reefs lie adjacent to deep water humps in this glacial lake, providing ideal fishing conditions for Walleye, Northern Pike, Smallmouth and Largemouth Bass, Crappie, and the thrill of the lake: Muskie. Over a half-million fishermen per year are drawn to the lake and surrounding region to experience world-class fishing or compete in the region's many fishing tournaments. Parts of the lake also offer excellent fishing for Lake Trout.



Sailing Adventure

On Lake of the Woods, you can find people sailing everything from a small dinghy or day sailers to a 40-foot or 50-foot yacht. Each year, Lake of the Woods attracts a small armada of sailboats that compete in the Lake of the Woods International Sailing Association Regatta. The Royal Lake of the Woods Yacht Club is the central social point for sailing enthusiasts, and it also organizes sailing classes, children's camps, regattas, and more.

Power Boat Excursions

The Summer ESCAPE power boating excursion draws boaters from Minnesota into Northwestern Ontario to take in the fresh smell of the woods and the lake's uninhabited wilderness. Many boaters come for the seclusion that the lake offers--there are thousands of remote small bays to anchor, providing protection from wind and waves, plus privacy with no homes nearby. Great, cool sleeping weather and warm summer swimming weather from July through September make Lake of the Woods a truly unique experience that is unmatched south of the border.





Kenora Wooden Boat Parade



Canoeing, Kayaking, Rowing, and Paddle Boarding

Kayaking and canoeing are popular at Lake of the Woods where boaters discover endless coves, islands, and beaches as they traverse the myriad of channels running through the lake. Paddlers from Manitoba, Ontario, and beyond come here to break away from their daily environment and create lasting memories of time spent on Lake of the Woods. Races organized by the North West International Rowing Association extend the number of boating visitors by drawing club members from the Upper Midwestern United States and Western Canada to the Kenora Rowing Club for regattas and events. The opening of the Pathway of the Paddle in 2017 - part of the Trans Canada Trail – will bring more paddlers to Kenora, one of the major stops on the path.

Houseboats

Houseboats are found on Lake of the Woods, offering vacationers the comforts of home. Many people in the region use a houseboat as their summer cottage, and there is a growing fleet of houseboats available for summer rentals.

Heritage Boating

For over 20 years, Kenora has hosted one of Canada's most interesting wooden boat parades, featuring classic restorations from the 'Golden Age' of recreational boating on Lake of the Woods. Held at Kenora Harbourfront each August, the parade includes everything from wooden kayaks to the *Grace Anne II*, a palatial mahogany yacht built by Ditchburn Boatworks of Gravenhurst that has been on the lake since its launch in 1931.

A Critical Mass of Local Boats and Boaters

Lake of the Woods stretches across Manitoba, Northwestern Ontario, and Minnesota, which together represent the local boating market for visitors to Lake of the Woods. The installed base of boats in Manitoba and Saskatchewan is estimated at 294,000 vessels; there are over 817,000 boats registered in Minnesota, and Ontario has the largest number of boats in the Great Lakes region with over 1.77 million boats.ⁱⁱⁱ While a large portion of Ontario's boating market is in the

southern region of the province, Northwestern Ontario is known as a region where the rate of boat ownership is high. The same is true of Minnesota, which has the highest number of boats per family in the United States (approximately one boat per 2.1 households). Day boaters, cottagers, and vacationers from Northwestern Ontario, Manitoba, and Minnesota bring their boats from these areas to enjoy a weekend escape or relax at a family cottage.

Drawing Boaters from North America's Largest Boating Region

The premier boating experience at Lake of the Woods draws boaters from Western Canada, Eastern Canada, the US Midwest, and US states with shorelines in the Great Lakes. Alberta and British Columbia are located within a 24-hour drive from Lake of the Woods, and over a quarter of the boats in Canada are located in these provinces (approximately 561,000 boats in Alberta and 571,000 boats in British Columbia). Wisconsin is also a large boating market with over 622,000 registered boats in the state. Travel time for boaters in Chicago to drive to Kenora is less than 14 hours, and there are over 368,000 registered boats in Illinois. All together, there are over 4.5 million registered vessels south of the Canada-US border that are within a 24-hour drive time from Kenora, representing approximately a third of all boats in the United States.

Grace Anne II, Lake of the Woods



North America's Largest Boating Market

Map 1: Installed Base of Boats in Kenora's Boating Visitor Catchment Area



Lake of the Woods occupies a strategic location within North America's largest boating market. More boats are purchased in the Great Lakes Region than in any other region of North America, and the region has the highest concentration of boats and boaters. In 2012, boaters spent over **\$5 billion** on new boats, engines, boat trailers, and boating accessories in Canada and the nearby US states of Minnesota, Wisconsin, Michigan, Illinois, Ohio, Indiana, Iowa, North Dakota, South Dakota, and Nebraska combined (Table 2). In addition to boaters from Canada, these states represent the main states from which boaters come to visit Lake of the Woods. Nearby states of Michigan, Minnesota, and Wisconsin ranked 3rd, 4th, and 6th out of the 50 US States in 2012

for total boating expenditures, with a combined **\$1.7 billion** market. Many of the boaters that come to Lake of the Woods from these states bring their boats to relax and explore the lake for a week or more. Others come to visit for a week or

Table 1 Installed Base of Boats by Province, 2013

Province	Estimated Boats
Atlantic Provinces	382,000
Quebec	721,000
Ontario	1,773,000
Manitoba/Saskatchewan	294,000
Alberta	561,000
British Columbia	571,000

Sources: NMMA Economic Impact Study of the Recreational Boating Industry 2013, NMMA Statistical Abstract 2013. Note: Provincial estimates are based on the share of Canadian boaters by province.

more at one of over 225 tourist camps and resorts located in the region. Fishing enthusiasts staying at these resorts use the fleet of boats maintained by the camps to explore the lake and enjoy the world-class fishing.

Table 2 Regional Boating Market 2012: New Powerboat, Engine, Trailer and Accessory Purchases in the US by State and New Boat and Engine Sales in Canada, 2012 (\$ millions)

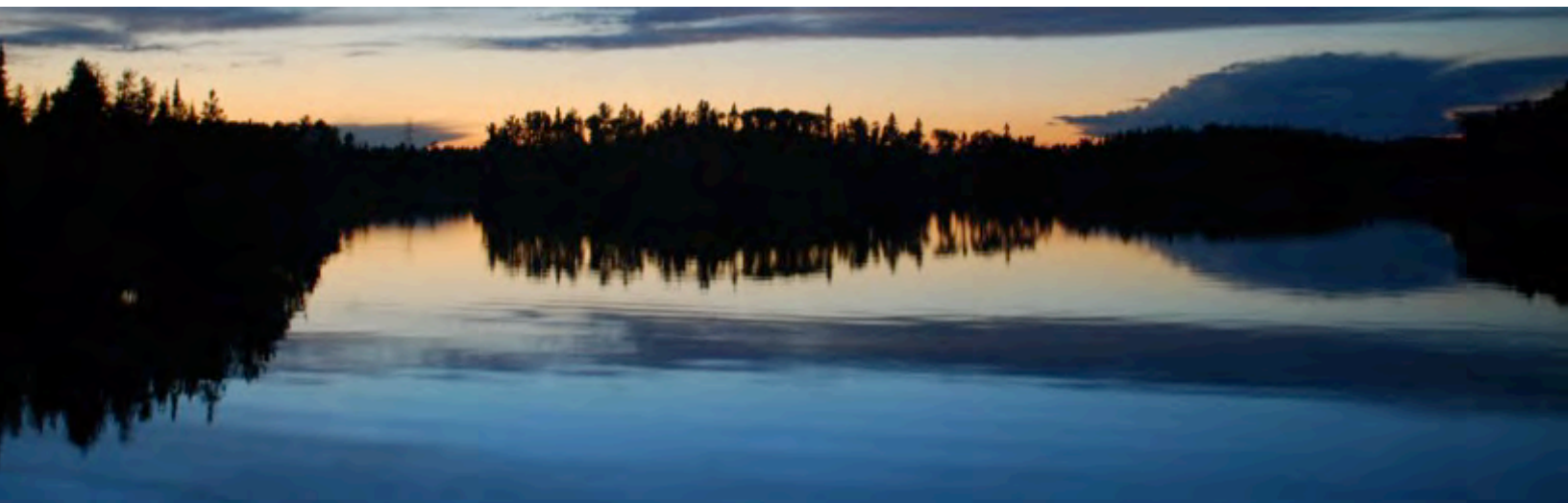
Location	New Boats*	Outboard Engines	Boat Trailers	Aftermarket Accessories	Total Expenditures
Canada	\$1,846	\$138	<i>n.a.</i>	<i>n.a.</i>	\$1,984
Selected US States					
Minnesota	\$185	\$97	\$6	\$266	\$553
Wisconsin	\$189	\$78	\$6	\$246	\$519
Michigan	\$256	\$80	\$7	\$302	\$645
Ohio	\$153	\$38	\$4	\$149	\$343
Illinois	\$135	\$51	\$3	\$143	\$333
Indiana	\$84	\$33	\$3	\$105	\$224
Iowa	\$62	\$27	\$2	\$70	\$161
North Dakota	\$41	\$24	\$1	\$57	\$123
South Dakota	\$35	\$17	\$1	\$44	\$97
Nebraska	\$34	\$11	\$1	\$41	\$87
<i>Sub-Total Selected US States</i>	<i>\$1,174</i>	<i>\$456</i>	<i>\$34</i>	<i>\$1,422</i>	<i>\$3,086</i>
Total Canada and Selected US States	\$3,020	\$593	\$34	\$1,422	\$5,069

Source: NMMA Statistical Profiles, US and Canada

Table 3 Canada New Boat Sales by Boat Type and Region, Unit Sales 2013

Region	Stern-drive Boats	Inboard Boat Cruisers	Inboard Ski/Wakeboard	Personal Watercraft	Jetboat Sales	Inflatable Boats	Sailboats	Total Boats
Alberta & British Columbia	1,651	503	1,412	1,071	663	272	217	5,789
Manitoba & Saskatchewan	524	54	445	443	67	19	10	1,562
Ontario	2,922	329	545	3,395	418	180	244	8,033
Quebec	1,103	274	966	1,332	170	275	104	4,224
Atlantic Canada	422	108	105	365	106	19	60	1,185
Canada	6,622	1,268	3,473	6,606	1,424	765	635	20,793

Source: NMMA Statistical Profiles, US and Canada



Kenora's Brand Identity as North America's Premier Boating Destination

Investing in the Destination

As the largest community on Lake of the Woods, boating and boating services have always been a central part of Kenora's economy. But despite being a premier boating experience, Lake of the Woods historically has been one of North America's best-kept boating secrets. While the lake has long been open to visitors, a limited level of tourism marketing and limited boating infrastructure on the lake historically meant that Lake of the Woods is like a private resort, with fewer services for visitors than other major boating destinations in North America. Since 2005, the City of Kenora has taken steps to invest in infrastructure to provide visitors a better experience and more opportunities to access the lake's unique charm and wonder. To develop Kenora's tourism and boating sector, the city began investing in new tourism-related infrastructure specifically designed to draw boaters. These investments include the construction of the new Lake of the Woods Discovery Centre and docks, a three-phase downtown revitalization plan for Kenora's Harbourfront Centre, the opening of Whitecap Pavilion, a multi-purpose venue on the waterfront, gateway signage, and plans for development of Kenora's five beaches. As the city prioritized boating, the private sector has responded with over \$61 million in investment. Between 2005 and 2012, Kenora enjoyed over **\$84 million** in combined public and private sector tourism investment.

Public Sector Investments



Lake of the Woods Discovery Centre



Kenora's Brand Promise

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

Telling Our Story

In 2011, the City of Kenora undertook an extensive visioning and branding exercise to position Kenora as North America’s Premier Boating Destination.

The visioning process resulted in a well-defined brand promise that communicates the feeling and story of Lake of the Woods, conveying the experiences available on the lake. The branding included the development of a logo, visuals, and marketing plan to tell the story of Lake of the Woods to boaters who have never known of--or visited--the area. Plans are underway to develop a Kenora Boat Museum at the site of the historic Keewatin Boat Works.

The boat museum will connect visitors to Kenora’s heritage as a boating and boat-building community. While exploring the history of boats and boat builders, visitors will also tour a working marina and see repairs being made to modern vessels, connecting them to the sense of place that is rich in boat building. The working museum will create complementary and memorable experiences for visitors, reinforcing Kenora’s position as North America’s Premier Boating Destination.

Present Day Two Bears Marina



Historic Keewatin Boat Works



Marketing to More Boaters

The Lake of the Woods Economic Development Commission has launched an aggressive plan to “own” our brand as North America’s Premier Boating Destination through strategies for product development, enhanced visitor experience, and aggressive marketing. Kenora’s Brand Leadership Team has prioritized over 20 high-leverage activities that will develop Kenora’s tourism product, enhance visitor experiences, and aggressively market Kenora to visitor markets (Table 4).

To strengthen Kenora’s position as the gateway to Lake of the Woods, Kenora’s marketing strategy emphasizes three messages to boaters:

- ✓ **We describe** the Lake and use the word “premier.” Premier means “the best”--the best boating experience in North America,
- ✓ **We invite** visitors to explore the lake’s 14,522 islands, and
- ✓ **We direct** guests to start their voyage in Kenora, positioning Kenora as the main point of access to the Lake.

And once in Kenora, visitors will find plenty to do: attending concerts, festivals, regattas and special events, participating in cultural activities, dining, shopping, visiting the public market, or hiking through the serenity of nature on woodland trails and waterfront retreats.

We understand our market and we want to grow.



We Use Three Messages to Attract Boaters

1. “Lake of the Woods is North America’s Premier Boating Destination”
2. “There are 14,522 islands to explore.”
3. “Your Voyage Starts Here”

Table 4 Highlights of the High Priority Activities 2012-2017 for the Brand Leadership Team

Product Development	Visitor Experience	Marketing
✓ Up to 14 boating-related events	✓ More docks & boat ramps	✓ Brand Style Guide Deployment
✓ One weekend-long event per month (year-round)	✓ Façade improvements by retailers	✓ Best of Kenora Guide
✓ Boating museum	✓ Way finding signage	✓ 3 signature "experiences"
✓ Visitor app development	✓ Public Wi-Fi	✓ Tourism website
✓ Full time event staff	✓ Bathroom facilities at docks & boat ramps	✓ Visitor Itinerary development
✓ Education: lake etiquette, maintenance, cooking on the lake	✓ Common retailer hours in the downtown core	✓ Database of lake-oriented businesses
✓ Winter tourism strategy development	✓ Improved customer service throughout businesses	✓ New logo implementation throughout City & partners
✓ Business recruitment	✓ Modernizing the Thistle Pavilion	✓ Collaboration + awareness for special events

Leveraging Social Networks and Events

Boating is both an escape and a social activity. So as part of our marketing and communication strategy, Kenora leverages events and boating clubs to spread the word and invite more boaters to Kenora.

Fishing Events

Each year the **Shaw Kenora Bass International** (kbifishing.com) attracts thousands of avid anglers to the region for a catch-and-release tournament. Other tournaments in the area include the **Bronze Back Bass Fishing Tournament** (bronzebackclassic.ca) that occurs on Kenora's Coney Island in August, the **Minaki Walleye Classic** (paradisecoveminaki.com), the **Shoal Lake Big Bass Classic** (bigbassclassic.com), the **Gary Roach Pro AM Walleye Tournament**, the **Black Sturgeon Bass Tournament** (Hidden Trail Resort, Kenora), and **Last Chance Bass Tournament**, held in Shoal Lake in September.

Sailing Regattas

The annual Lake of the Woods International Sailing Association (LOWISA) Regatta (facebook.com/lowisaregatta) began in 1966 and draws hundreds of sailors of all skill levels from across North America for a week-long boating regatta that weaves through some of the best freshwater sailing in the world.

Rowing Events

The Kenora Rowing Club hosts the North West International Rowing Association's Championships and other major regattas. Kenora is a recognized centre for rowing regattas, with best rowing location between Vancouver Island and St. Catherines Rowing Club. The Kenora Dragon Tamers can be seen paddling around Kenora and hosts competitions for dragon boat teams from around the region.

Harbourfest

Harbourfest (harbourfest.ca) is Kenora's largest celebration of the Lake of the Woods and the variety of activities are themed around the lake such as canoe jousting and the wooden boat show and parade. The three-day event includes multiple cultural and performing artists, and each year a headlining band performs on the Harbourfront. Previous acts include Paul Brandt, Loverboy, Platinum Blonde, Honeymoon Suite, Trooper, Terri Clark, Blue Rodeo, and Crash Test Dummies.



Kenora's Boater Segments

Kenora benefits from at least five major segments of boaters coming to Lake of the Woods.

Cottagers		<p>Cottagers are a large and stable market of leisure boaters who spend money on boats, marina services, shopping, dining and entertainment.</p>	<p>Demand is being met with room to grow.</p>
Regional Day Boaters		<p>Participation in boating is high in Manitoba and Northwestern Ontario, but many boaters spend only a few days a year on the water and want to make them count.</p>	<p>More investment is needed to capture this growing market.</p>
Large Boats Staying for A Season or More		<p>Large boats are the fastest growing segment of the boating industry, creating demand for services that can accommodate these affluent boaters.</p>	<p>Demand is expanding, creating new opportunities.</p>
Cruisers Stopping Over		<p>Kenora is a stop-over for boaters cruising from the US and other places, looking for basic services, dining, shopping, and entertainment.</p>	<p>Services for these boaters are quite limited in Kenora with need for expansion.</p>
Boats at Tourist Camps and Used by Guides		<p>Fishing and recreational resorts across Northwestern Ontario operate fleets of fishing boats for their guests, creating stable demand for boats and related services.</p>	<p>This established market can be served from Kenora, the region's largest community.</p>

Cottagers and Local Residents

Lake of the Woods is a summertime private recreation destination for cottagers who have been coming to the region for over a century to enjoy Lake of the Woods and other smaller lakes and rivers in the area. An estimated 20,000 cottagers reside in the Kenora District as part-time seasonal residents and 93% of cottagers participate in boating while visiting Lake of the Woods.ⁱⁱⁱ According to the 2011 Census of Canada, there are approximately 814 seasonal dwellings^{iv} in the City of Kenora and approximately 7,756 seasonal dwellings in the Kenora District. While the exact number of cottages on Lake of the Woods is not directly tracked statistically, there are over 4,000 members of the Lake of the Woods District Property Owners Association (LOWDPOA) who spend time at their cottages in the area. According to the Survey of Cottage Owners (2003), LOWDPOA members spend over \$85 million per year in the area, and 79% of their shopping is done in the City of Kenora. Boating is a way of life for local residents in Kenora. Most local residents are avid recreational boaters, but boating is such an integral part of life in Kenora that our local Safeway offers parking both for cars and boats.

Table 5 Cottager Characteristics for LOWDPOA Members

Indicator	Key Stat
LOWDPOA Membership	Over 4,000
Annual Spending (2003)	\$85 million
Average Cottage Size	1,500 sq. ft.
Average Cottage Market Value (2003)	\$200,000
Maximum Cottage Market Value (2003)	\$2 million
Average Number of Days Per Year Spent at the Cottage (Part-Time Residents)	79 days
Percentage of cottagers participating in boating activities	93%
Percentage of cottagers participating in fishing	83%
Percentage of cottagers participating in canoeing	57%
Percentage of cottagers participating in sailing	22%

Source: LOWDPOA Survey 2003

Figure 1 Boat Parking at Safeway



Table 6 Cottages and Part-Time Residents 2011, Kenora District and City of Kenora

Usual Residents and Part-Time Cottage Residents	Kenora District	Kenora City
Part-Time Cottage Market (Estimate)		
Estimated Seasonal Residents	20,449	1,916
Estimated Dwellings Occupied by Seasonal Residents	7,756	814
Year-Round Residents (Cottagers and Other Residents)		
Total Population of Usual Residents (Year-Round)	57,607	15,348
Dwellings Occupied by Usual (Year-Round) Residents	21,850	6,521

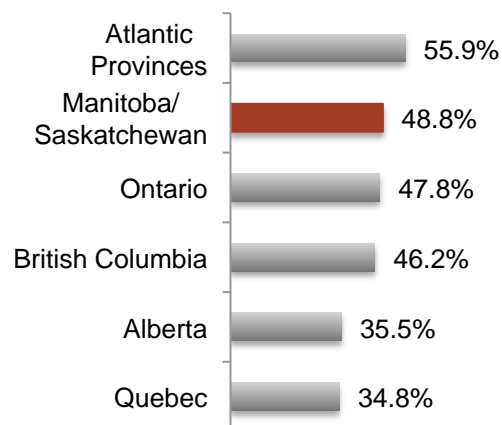
Source: Census 2011, Community Profiles. The estimate of cottages is based on total habitable dwellings not occupied by usual (year-round) residents. Estimate of cottage residents based on average residents per dwelling.

Regional Day Boaters



Day boaters represent about half of boaters in Canada. According to the NMMA Canadian Statistical Abstract, 55 per cent of people participating in recreational boating in 2013 boated for five days or less during the year. Studies have shown that most boaters prefer to boat at places close to where they live due to limited time availability.^v Kenora is an easily-accessible day boating and weekend getaway for many of Manitoba's 1.27 million residents, and Manitoba represents the largest segment of current visitors to Kenora, with approximately 288,000 annual person-visits to the Kenora District per year.^{vi} Manitoba's largest city, Winnipeg, is located approximately 200 kilometres away, and the city's population growth rate over the past decade has been one of the highest in Canada, expanding by 11 per cent from

Figure 2 Rate of Recreational Boating Participation by Region, 2013



Source: NMMA Statistical Abstract 2013

2002 to 2012. Population in the Winnipeg Census Metropolitan Area is expected to reach over one million residents by 2035, with net international migration attributing a gain of approximately 9,500 new residents every year.^{vii}



Growing Population

The Province of Manitoba has made it a priority to increase the size of the provincial labour force through increased immigration and has achieved strong results. Immigration in the recent years has been at the highest levels in decades. Manitoba's **Provincial Nominee Program** plays a significant role in this achievement, and it continues to be immensely successful in bringing skilled immigrants and entrepreneurs to Winnipeg.

As the population in the local region expands, Kenora is well-positioned to benefit from a growing popularity of boating and a growing base of regional boaters. As demand expands, there is a need for services to get onto the lake quickly. Many of Kenora's marinas and public boat ramps operate at or beyond capacity during the summer months, and local marina operators report that the current capacity to serve the regional day-boater market is limited, creating an opportunity to capture an underserved and growing market.

Large Boats Staying for a Season or More

The large boat segment is the fastest growing in Canada. Between 2009 and 2012, unit sales of fiberglass boats over 27 feet have increased by 27 per cent, and sales of metal boats of a similar size has more than doubled. With an average 2013 sale price of \$216,570 for a fiberglass boat over 27 feet, the owners of large boats represent a high-income boater seeking premium services (Table 7).

Table 7 Unit Sales of Boats 2009-2013 and Average Sale Price 2013, Canada

Size	Unit Sales					Growth 2009-2013	Average Sale Price 2013
	2009	2010	2011	2012	2013		
Fiberglass							
Smaller than 14'	556	719	769	644	596	7.2%	\$10,623
14' - 16'11"	2,198	2,613	1,608	1,586	1,498	-31.8%	\$11,626
17' - 20'11"	2,519	3,082	2,007	2,048	1,985	-21.2%	\$26,218
21' - 23'11"	602	797	590	654	672	11.6%	\$35,142
24' - 26'11"	232	297	249	218	212	-8.6%	\$63,799
27' and larger	141	180	168	192	179	27.0%	\$216,570
Metal							
Smaller than 14'	535	792	1,010	734	568	6.2%	\$813
14' - 16'11"	8,401	10,227	7,181	7,711	6,909	-17.8%	\$4,885
17' - 20'11"	5,471	6,956	5,591	6,636	7,003	28.0%	\$12,585
21' - 23'11"	1,252	1,707	1,613	2,336	2,643	111.1%	\$20,488
24' - 26'11"	511	673	658	873	1,063	108.0%	\$30,373
27' and larger	130	170	158	228	264	103.1%	\$28,876

Source: NMMA Statistical Abstract 2013

Lake of the Woods can provide a large-boat owner with virtually unlimited territory to explore. According to local marina owners, there is a growing number of yacht owners who want to reposition their vessels at Lake of the Woods for a season or a few years. To meet this growing demand, there is a need for slips and storage that can accommodate larger vessels and provide the array and quality of services that large boat owners prefer.

Cruisers Docking Short-Term in Kenora

Kenora is a popular destination or stop-over for boaters that cruise up from the US and from other locations. Cruisers come to Kenora for both basic services like black water pump-out, laundry, groceries, ice, and water. They are also looking for a change of scene to take in the city's eclectic dining and shopping experiences in Harbourtown Centre, Kenora's charming downtown. Boat slips at the marinas in the Kenora area are full with waiting lists, reflecting pent-up demand for additional slips for docking. In addition to demand for slips, basic services, and entertainment, water taxi services can be expanded to serve boaters who are anchored temporarily.

Boaters at Tourist Camps Across Sunset Country

Resorts in the region are referred to as "tourist camps" and they offer visitors from the United States and elsewhere an outstanding fishing and wilderness experience at camps on Lake of the Woods or at fly-in fishing camps in the region's trophy waters. There are over 375 tourist camps in the region scattered throughout Northwestern Ontario and Minnesota, including over 225 in Sunset Country (Northwestern Ontario), over 85 on Lake of the Woods, and over 150 in Minnesota. In addition, there are many local anglers and guides in the region.



Cruisers



LOWISA Anchorage



Kenora Harbourtown Centre

Visitors from the United States are among the largest category of visitors for tourist camps. The Kenora District benefited from approximately 235,000 total person-visits from US residents in 2008, which collectively accounted for the majority of visitor spending in the region (71%). Visitors to Winnipeg are also a promising market for tourist camps. Winnipeg draws visitors from around the world, hosting over 3.6 million visitors and \$771 million in visitor spending in 2011.^{viii} International travellers who visit the Canadian Museum of Human Rights in Winnipeg are able to experience the world-renown beauty of the Canadian Shield at the tourist camps of Ontario's Sunset Country, just 200 kilometers away. Tourist camps, anglers and guides are some of the largest consumers of boats, engines, and accessories needed to maintain their fleets. Kenora is an ideal location for boating services companies that want to serve communities throughout Ontario's Sunset Country.



Great Escapes



Business Opportunities in Kenora's Boating Sector

Docks, Marinas and Boating Services

While there are few official statistics collected on the number of boats on Lake of the Woods, boating business owners estimate that there are approximately **8,000 to 10,000 powerboats and larger sailboats** on the lake each summer and about 1,000 boats sold into the region each year. This critical mass of boats creates ongoing demand for docks, slips, marinas and boating services.

According to the Kenora Survey of Marinas, in the fall of 2013, there were 19 marinas in the Kenora area that collectively offered 1,293 slips. This number includes several smaller marinas with 20 to 50 slips and four larger marinas:

- Devils Gap (250 slips)
- Northern Harbour (242 slips plus 90 dinghy slips)
- Two Bears Marina (225 slips)
- Rheault Bay Marina (120 slips)

The capacity is expanding with Tall Pines Marina at Cameron Bay opening a new 200-slip marina, under construction in 2014. Several marinas have plans for expansion during the 2013-2016 period.

Still, there is significant unmet demand for docking slips and related services in Kenora, spanning all categories of boaters including day boaters, regional large boats, stop-over cruisers, and services to seasonal residents. Marina owners report that there is strong demand to expand docking services and other services to boaters. According to the Kenora Survey of Marinas, 90 per cent of available slips are leased to seasonal residents. Between all marinas, there are just 54 slips available for casual day users and no marina currently offers mooring balls. In addition to public boat ramps, only seven marinas offer boat ramps, leading to longer wait times to get a boat onto the water during the busy summer season. Most marinas do not maintain a waiting list for slips, but among those that do, there was a cumulative 143 boaters waiting for a slip in fall 2013. At Kenora marinas, there are a total of 378 slips with a length of over 21 feet that can



Value-Added Services Offered by Kenora Marinas

- Barging
- Boat and boat parts dealers
- Boat rentals
- Boat storage
- Cottage rentals
- Exercise equipment
- Fiberglass shops
- Fishing supplies
- Full-service gas stations
- Garbage and recycling services
- Guide services/tours
- Hotel and convention facilities
- Indoor kids clubs/Outdoor parks
- Laundry facilities
- Mechanical repairs
- Pump-out services
- Restaurants
- Retail stores
- Sailboat charters
- Showers/washrooms
- Taxi service
- Water hydro
- Wi-Fi
- Winterizing and shrink wrap services

accommodate larger vessels. As demand for marina services, slips, and boat launches grows, there is ample opportunity to add capacity.

Local Government Support for Marinas is Strong

In 2013-14, governments supported the opening of the new marina at Cameron Bay with a \$1.08 million water and sewer line extension. This new marina, opened by Winnipeg Sports and Leisure, is the first project planned for development on the scenic eastern shoreline of pristine Cameron Bay in Kenora. The marina is expected to create 20 to 25 jobs while contributing approximately \$30,000 annually in tax revenue to the city. The project includes a 200-slip marina, a restaurant, dealership, and boat storage. FedNor and the Northern Ontario Heritage Fund Corp provided grants to match the city's \$360,000 contribution to the project. The city is not only going to service the marina, but the plan includes extending water and sewer infrastructure across Cameron Bay to accommodate unspecified future development on the west side as well.

Map of Kenora Marinas, Docks, Launches, and Wharfs



Table 8 Kenora Public Docks

Public Docks	Time Allowed	21 Foot	21 Foot Lease	21+ Foot	Moor	Launch	Main-land	Lease Rate with Tax
7th Street Dock	1 hour	7	0	0	0	0	Yes	
Anichinabe Boat Launch	4 hours	16	0	0	0	5	Yes	
Anicinabe West	4 hours	8	0	0	0	0	Yes	
Bay Road	15 min.	0	0	0	0	3	Yes	
Coney Island Beach	4 hours	40	0	0	0	0	No	
Coney Island North	Reserved	0	22	1	0	0	No	\$412.45
Harbourfront	4 hours + 15 min. (1 loading)	34	36	0	4	0	Yes	\$616.98
Keewatin Beach	Many spots, swimming only	6	0	0	0	0	Yes	
Keewatin Arena	2 @ 1 hour, 2 @ 15 min	2	11	0	0	2	Yes	\$616.98
Keewatin Wharf	1 hour	12	11	0	0	2	Yes	\$616.98
KRC	15 min	0	0	0	0	5	Yes	
Main Street South	24 @ 4 hour, 6-8 for lease	24	0	6	0	0	Yes	\$10,000
Matheson Street South	4 hour, launch still visible	16	0	0	0	1	Yes	
Water Street	Seasonal lease	0	23	0	0	0	Yes	\$412.45
WTP	No parking, 4 spots	0	0	0	0	0	Yes	
Winnipeg River	2 launches	0	0	0	0	6	Yes	
Discovery Centre	4 hours	7	0	0	0	0	Yes	
Total	No overnight on public access	172	103	7	4	24		

Source: Kenora Survey of Marinas, 2013





Table 9 Kenora Marinas and Slips, 2013

Marina	Total Slips	Slips Less than 21 feet	Slips 21 Feet or Greater	Unused Docking Slips Available for Rent	Docking Slips Available for Casual Day Users
Northern Harbour*	242	42	200	0	10
Devils Gap	250	0	0	20	0
Two Bears Marina / The Chia Group	225	146	79	25	6
Rheault Bay Marina	120	100	16	4	0
Anchor Inn	80	n.a.	n.a.	0	0
Change of Latitude	54	28	26	0	3
Bare Point Marina	54	27	27	6	0
Perch Bay Resort	45	n.a.	n.a.	0	0
Lake of the Woods Marina	40	n.a.	n.a.	0	0
smith Camps	35	20	6	0	6
The Chia Group (405 1st Avenue)	35	35	0	8	8
The Chia Group (315 Main Street)	26	26	0	0	0
Island Harbour	21	3	18	0	0
Jack Bannister Centre Inc.	20	16		0	4
Best Western Lakeside Inn	16	14	2	0	16
Deception Bay Marina	10	3	3	4	0
Duncan McEwen	9	7	1	0	1
The Chia Group (232 Water Street)	8	8	0	0	0
Shaw-nee Guiding	3	3	0	0	0
Total	1,293	478	378	67	54

Source: Kenora Survey of Marinas, 2013 *Note: Northern Harbour also offers 90 dinghy slips.

Boat Accessory and Services Businesses

As the number of boats and boaters on Lake of the Woods grows, there is ample expansion opportunity for boating supplies and accessories stores. Parts and service stores that offer enhanced services to boaters such as marine electronics service and repair, retail technical apparel and footwear for boating, and other retail services to boaters will be able to address gaps in the current boating services offerings.

Kenora has two main commercial districts, Harbourfront Centre and Keewatin. Both are home to marinas and both areas are ideal locations for boating businesses that want to be located in the heart of busy shopping and entertainment areas. Over fifty specialty retailers and over forty eclectic restaurants are located in the two districts. In addition to shopping, visitors can explore art galleries, enjoy a massage at the Zen Den, grab a snack at HoJoe Coffee and Books, or sip on a Sasquatch Black Lager at Lake of the Woods Brewing Company.

Harbourtown Centre: Kenora's Downtown Waterfront Hub

The completion of the initial phases of Kenora's Downtown and Waterfront Revitalization marks a major milestone in the transformation of Kenora from a community tied to its industrial past to a forward looking, regional tourism hub for the boating industry. Both identities are intimately tied to the landscape: the shift from resource extraction to scenic and recreational values is part of a sustainable long-term vision that the designers helped shape. This is the landscape that inspired the Group of Seven: towering red pines, outcrops of the oldest granite on Earth, and stunning lake vistas.

Against this backdrop, Kenora's downtown shops offer an ideal shopping district for boating businesses that want to be located near the water. Guides, outfitters, and special one-of-a-kind boating retailers have opened shops alongside eclectic waterfront dining that offers spectacular views of the lake.

Credit: HTFC Planning and Design. Above: Aerial view of Harbourtown Centre. Below: Whitecap Pavilion



Keewatin

Now a part of the amalgamated City of Kenora, Keewatin is the first town visitors encounter when traveling to Kenora from Manitoba. In addition to a quaint grocery store, the charming town with old world homes has an arena, curling club, gas stations, banks, a public library, and the historic Mather Walls House. Portage Bay and Keewatin Bay are home to boating businesses such as Two Bears Marina and Bennett's Marine Service. Keewatin Beach offers a shady picnic spot and playground area that is a favorite for families visiting Kenora. The area has a boat launch and there is a growing cluster of hotels and restaurants located in Keewatin including Timberline Lodge, 901 Westside, and Nature's Inn.

Right: Two Bears Marina



Specialty Retail, Dining and Entertainment for Boating Visitors



Independent businesses have carved a niche in Kenora, creating brands and products that communicate the experience of boating on Lake of the Woods.

Businesses Rednex Rebellion Independent Canadian clothing companies like Rednex Rebellion are located in Kenora, creating designs that celebrate life on Lake of the Wood. A home-grown success, Rednex Rebellion started out by spray painting designs on t-shirts for gatherings that we would attend. With strong support from the Kenora community and a growing visitor market, the owners hobby has grown into a successful business and famous athletes such as Mike Richards and Jeff Carter are wearing the clothing they produce, raising Kenora's profile.

The Hardware Company is another Kenora original, located in the historic Fife Building in Harbourtown Centre. Hardware Company offers a huge assortment of clothing for function and fashion. From parkas to bikinis, sunglasses to kayaks, standup paddle boards to snowboards, shoppers find it at the Hardware Company. On the lower level is the region's premier cycling and ski/snowboard shop, with a wide range of equipment and a service centre.



Many of Kenora's Retailers offer specialized services to individual boating markets like wakeboarding or stand-up paddle boarding – or offer unique services that enhance the visitor experience.



Boardanyone is a full-service action sports shop serving clients throughout Northwestern Ontario and Manitoba. The shop is 100% Canadian owned and operated by individuals with a genuine love for action sports. The co-owners have been actively participating in these types of sports since 1989, and bring their enthusiasm and knowledge of the industry.

Located in Kenora's Historic Firehall, downtown on 2nd Street South, the **LOWBrewCo. Tap Room and Eatery** offers a range of menu items from up-scale pub grub with a local twist, to ethnic-fusion dishes and great beer paired snacks. The menu is complemented by a selection of freshly brewed craft beer from the on-premise micro-brewery. In nice weather, large glass garage doors are lifted onto a 55 seat patio; opening the entire taproom to the fresh air and environment of the outdoors. There is always room to catch a sporting event of any sort on one of the ten bar mounted TVs. There is live music on the main level and nightly pool and darts on the second floor.



The MS Kenora (www.mskenora.com) tours daily on Lake of the Woods providing a relaxing tour with commentary and a full bar and restaurant service available. Two fully enclosed decks with heating and air conditioning plus one upper open deck with canopy offer spectacular views of Lake of the Woods.



Kenora's local dining scene includes over 35 restaurants and gives visitors a wide variety of tastes

and cuisines to choose from. Restaurants like the Boat House offer deck dining on the water. Borrelli's Italian Restaurant serves up rich Italian cuisine and The Plaza Restaurant and Tavern has been recognized for the best calamari in Canada. Bijou Steakhouse opened in 2012 and has been one of the most anticipated additions to Kenora. Bijou offers in house AAA cuts and French cuisine, along with live music Wednesday through Saturday, featuring a variety of performers including Bijou owner David Caissy and the Cabo Cowboys who play blues, jazz and good old rock & roll.



Boat Dealers

No boating centre is complete without a group of boat dealers and Kenora's boat dealers are expanding to capture opportunities in the growing market.

Winnipeg Sports and Leisure

specializes in runabout boats from Cobalt & Four Winns, performance towboats from Malibu, and wakeboard & waterski gear by Ronix, Radar, Hyperlite, O'Brien & Sportsstuff. Their new Kenora location at Tall Pines Marina in Cameron Bay is expected to open in 2015. Located in Keewatin,

Woodlake Marine is a dealer of new and pre-owned boats including fishing boats, skiing boats, runabouts, pontoon boats, cabin cruisers and personal

watercraft (PWC). Woodlake has been recognized by Mercury, being awarded the prestigious CSI award for putting the customer first. **K-Sports Marine** carries a complete boat line up including Crestliner, Sylvan and BRP Evinrude Outboards, as well as Ezloader and Roll-IN boat trailers. **Enns Brothers** proudly carries Sea-doo and a wide range of boat accessory brands. **Lake of the Woods Mobile Marine** offers mobile repair services alongside other boat repair shops.

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

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



Boat Sales Event in Kenora

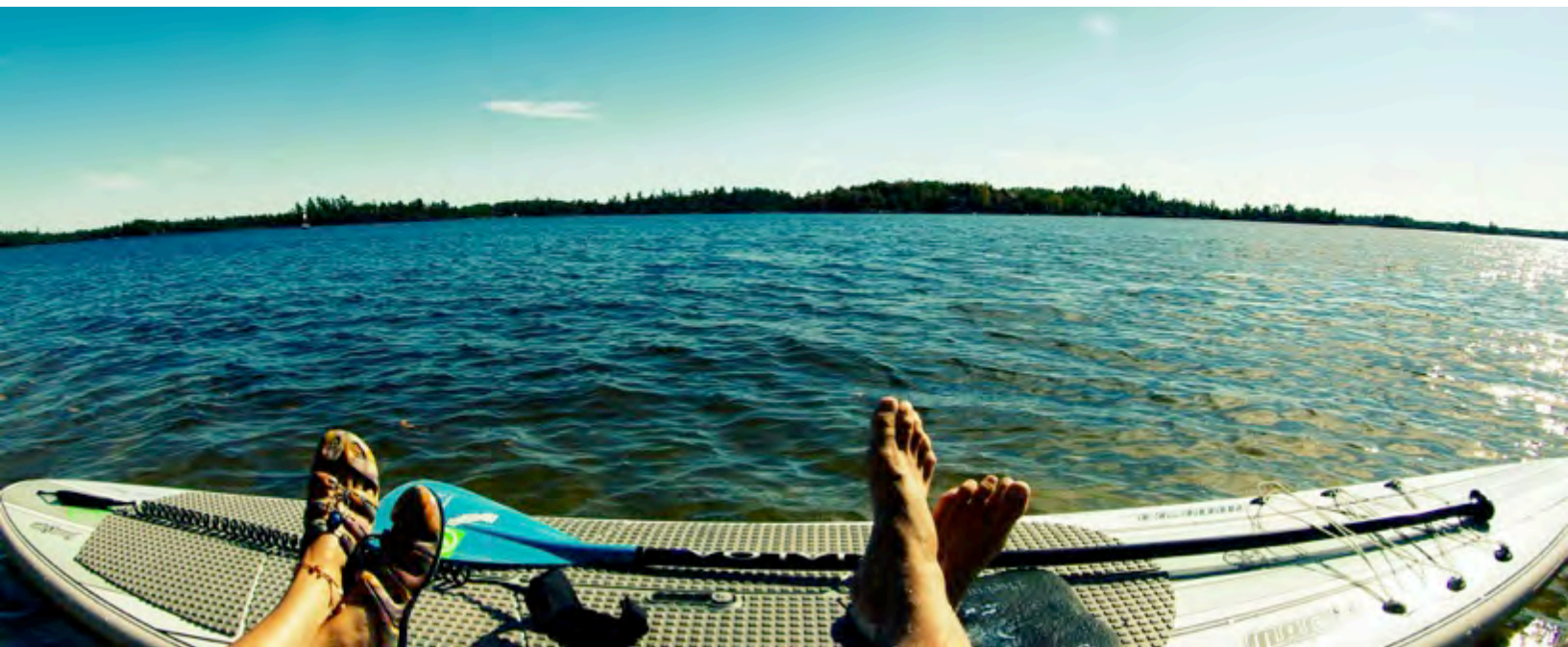
Kenora's location in the heart of the continent makes it an ideal location for boat sales events. In 2012 and 2013, Kingfisher held its annual dealers meeting and customer appreciation events under the tent at Whitecap Pavilion in Kenora. The event drew dealers from around the continent, and drove growing sales for Kingfisher. Woodlake Marine has also held major sales events at Whitecap Pavilion, drawing local camp operators, residents, and regional boaters to explore a variety of outdoor equipment. The location of the Pavilion on the water makes it easy to take a boat for a spin – a great way to sell boats to an interested buyer market.



Anicinabe Park Beach, Kenora

Boat Rentals

The demand for boat rentals is high for power boats, sail boats, paddle boats and personal watercraft. **Lakeside Watersports** provides rentals of seadoos, deck boats, pontoon boats, fishing boats and other water toys. They also provide guided fishing trips and lake tours. **Perch Bay Resort** offers daily and weekly boat rentals to explore the Winnipeg River, north of Kenora and **Northern Harbour** offers half-day and day-long sail boat rentals. Kayak and other paddle board rentals are available from **Boardanyone** and the **Hardwear Company**. Green Adventures Kayak Company opened in 2014 at Anicinabe Park and offers guided paddling trips as well as kayak, canoe, paddle board, and motor boat rentals.



Made in Kenora

Boat and Accessory Manufacturing

In addition to sales and service for boaters, Kenora is also home to boat manufacturing. Kenora has a long history of boat building and offers a unique location for a boat manufacturer. Ample waterfront property is available for development and would offer boat manufacturers direct access to the water for testing of boats, while also increasing brand visibility and awareness among boaters visiting North America's Premier Boating Destination.

Location Advantage

In addition to its brand as North America's Premier Boating Destination, Kenora's advantage for manufacturers is its geographic location in the heart of the continent. Kenora is centrally-located in North America's main freshwater boating region and surrounded by boating camps and resorts. Direct rail via CPR and highway access on the Trans-Canada Highway provide excellent distribution infrastructure from Kenora, whether distributing to markets in the East, West or South. The City of Winnipeg is located just 200 kilometers to the west. Kenora businesses can also benefit from advantages at CentrePort Canada, an inland port in Winnipeg, offering efficient access to tri-modal transportation including Winnipeg's James Armstrong Richardson International Airport, one of the country's top cargo airports with 24/7 operations. CentrePort Canada is the only inland port in Canada offering business "single-window" access to Foreign Trade Zone (FTZ) benefits that help companies manage imported inventories through duty deferral, exemption from federal and provincial sales taxes and sales tax-free and duty-free storage and distribution facilities.



Vanair Hovercraft is a Kenora manufacturer and supplier of high quality hovercraft to markets worldwide. Ranging in size from 12 passenger to 40 passenger, **Vanair hovercraft** are built primarily of marine grade aluminum and provide years of trouble-free passenger and freight-hauling service in demanding commercial applications.

A Rich Boat Making History

In 1897, John William Stone established the J.W. Stone Boat Manufacturing Company. His company became synonymous with fine craftsmanship and superior boat building and was known throughout Western Canada as **the** place to have your boat built. He set up shop in a boathouse on the harbourfront and with his crew of skilled shipwrights, mechanics, and carpenters working long, hard hours, his inventory expanded to include duck boats, sailing canoes, ice boats, rowing shells, barges, as well as the new motor launches.

Source: Lori Nelson, Lake of the Woods Museum



Labour Costs and Availability

Kenora has a loyal labour force. Many people have deep roots in the region dating back for generations and there is a strong sense of satisfaction in our way of life and natural surroundings. Employers report that we have made it easy to recruit workers to Kenora because of the lifestyle and connection to the lake and Boreal forest. Once someone moves to Kenora, they don't want to leave – and that helps employers to grow their workforce from within.

Labour wage rates in Kenora are reasonable enough to support manufacturing. Kenora is a growing community that has prioritized expansion of a diversified economy to ensure jobs for local resident. Unlike many communities in the region that have a single-industry focus with a captive labour market, Kenora's diversified growth strategy offers manufacturers a stable and growing labour force. Kenora's complementary focus on the forestry sector, tourism sector, mining sector, boating sector and other industries ensures that Kenora has a base of highly-skilled workers who can meet the needs of employers. At the same time, Kenora's location protects manufacturers from losing workers during the cyclical labour shortages caused by the oil patch. Because we are located 200 kilometers from Winnipeg, Kenora residents are less willing fly out to jobs in the oil industry, helping employers retain their workforce.

Because the forestry and mining sectors in Kenora share a labour force with the manufacturing sector, Table 10 contains wage comparisons for several sectors.



Table 10 Low, Median, and High Wages - Northwestern Ontario, Selected Occupations

	Low	Median	High
Occupations for the Boat Manufacturing Sector			
Motor Vehicle Assemblers, Inspectors and Testers (NOC 9482-C)	\$14.75	\$30.00	\$35.00
Painters and Coaters – Industrial (NOC 9496-C)	\$13.77	\$19.39	\$31.25
Contractors and Supervisors, Carpentry Trades (NOC 7215-B)	\$12.50	\$19.00	\$38.00
Contractors and Supervisors, Mechanic Trades (NOC 7216-B)	\$16.78	\$28.00	\$44.74
Machinists and Machining and Tooling Inspectors (NOC 7231-B)	\$14.50	\$23.00	\$30.87
Occupations in the Forestry and Mills Sector			
Supervisors, Logging and Forestry (NOC 8211-B)	\$14.33	\$22.38	\$30.01
Logging and Forestry Labourers (NOC 8616-D)	\$12.00	\$19.06	\$25.00
Pulping Control Operators (NOC 9233-B)	\$11.75	\$24.00	\$30.86
Pulp Mill Machine Operators (NOC 9432-C)	\$23.85	\$26.38	\$30.86
Papermaking and Finishing Machine Operators (NOC 9433-C)	\$10.50	\$16.73	\$26.32
Lumber Graders and Other Wood Processing Inspectors and Graders (NOC 9436-C)	\$13.00	\$18.40	\$25.36
Labourers in Wood, Pulp and Paper Processing (NOC 9614-D)	\$12.75	\$24.07	\$26.87
Mining Occupations			
Supervisors, Mining and Quarrying (NOC 8221-B)	\$17.48	\$31.00	\$50.00
Underground Production and Development Miners (NOC 8231-B)	\$15.00	\$28.30	\$40.00
Logging Machinery Operators (NOC 8241-B)	\$19.50	\$23.20	\$27.61
Underground Mine Service and Support Workers (NOC 8411-C)	\$10.25	\$32.17	\$41.97
Landscaping and Grounds Maintenance Labourers (NOC 8612-D)	\$10.25	\$14.00	\$24.00
Mine Labourers (NOC 8614-D)	\$15.70	\$20.63	\$29.75
Labourers in Mineral and Metal Processing (NOC 9611-D)	\$12.00	\$18.00	\$25.00

Source: Working In Canada Wage Report

Transportation infrastructure

Kenora is located on the Trans Canada Highway and has south-bound connections to the US at three border crossings. Kenora is one of the few locations in Canada that offers access to both CP and CN Rail lines. The CP main line runs through Kenora and CN national main line has a switching yard 30 kilometers north of the city. The Kenora Airport offers 24 hour service, seven days a week. A single well-maintained runway is 5,800 foot in length, capable of landing a 737 size aircraft. Bearskin Airlines provides scheduled air service to Kenora as well as to other regional airports including:

- Lynn Lake
- The Pas
- Flin Flon
- Winnipeg
- Red Lake
- Sioux Lookout
- Dryden
- Fort Frances
- Thunder Bay
- Kapuskasing
- North Bay,
Sudbury
- Timmins
- Sault Ste Marie
- Ottawa
- Kitchener/
Waterloo areas

Three Canada-US border crossings are located within 500 km of Kenora: Fort Frances, ON-International Falls, MN; Rainy River, ON-Baudette MN; and Thunder Bay, ON-Grand Portage, MN.

Table 11 Regional Border Crossings

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

Table 12 Travel Distances to Selected Cities

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

Source: Google Maps

Industrial Parks and Land

Kenora has land. Unlike most waterfront communities, we have plenty of land for development. The City of Kenora is a major landowner and has several waterfront holdings that can be developed for use by boating manufacturers. There is also a large amount of privately held land available for sale. Manufacturers looking for shovel-ready industrial parks can choose from three industrial sites ready for development, including:

- **An privately-held 80-acre former mill site:** The site currently has four buildings with approximately 200,000 sq. ft. of space as well as nearby water access.
- **Jones Road Industrial Park:** Developed in conjunction with the Weyerhaeuser Kenora TimberStrand® mill servicing corridor, the 245-acre park offers municipal sewer and water services, natural gas service, communications infrastructure, and excellent road access for companies wanting to co-locate with the Weyerhaeuser TimberStrand® mill. The park is located 1 kilometer from the Trans-Canada highway and offers spur access to the Canadian Pacific Railway mainline.
- **Kenora Airport Industrial Park:** The Kenora airport site offers direct access to the IFR rated Kenora Municipal Airport. The 60-acre park offers fast access to either air or ground transportation and is located 1 kilometer from the Canadian Pacific Railway mainline. Sites are available for lease only.

Figure 3 Airport Industrial Park



Airport sites available for lease only.

Figure 4 Jones Road Industrial Park Sites

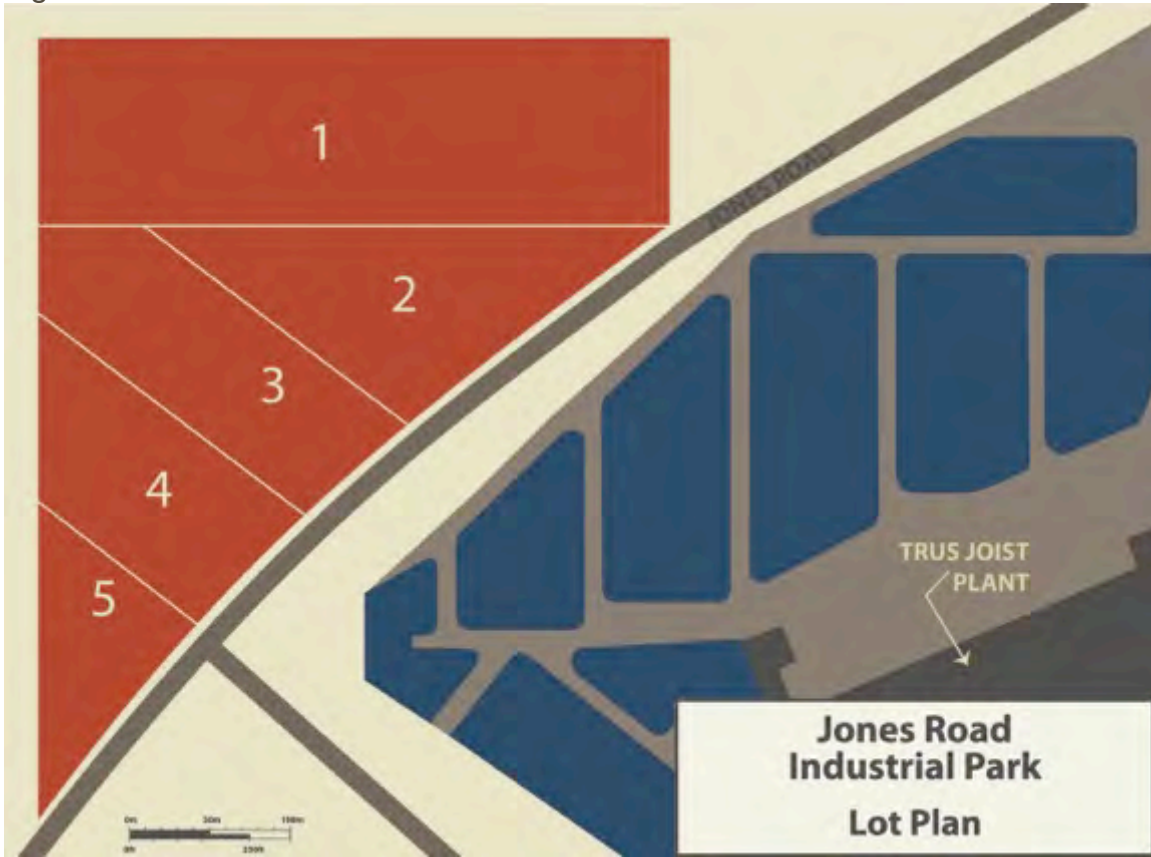


Table 13 Jones Road Industrial Park Sites: Size and Original Price

Lot Number	Size in Acres	Price
1	10.9	\$150,000*
2	4.5	\$85,000*
3	1.7	\$65,000*
4	2.2	\$75,000*
5	2.4	\$75,000*

*Note: Lot values may be subject to price fluctuation, based on current market conditions. For more information about revised Jones Road Industrial Park site boundaries or prices, please contact Jennifer Findlay, Economic Development Officer jfindlay@kenora.ca (807) 467-2127.

Other Factor Costs of Doing Business

Electric and natural gas costs in Kenora are highlighted in Appendix A. Kenora also offers reliable electric service that can expand to meet most any commercial or manufacturing need.

Other Resources For the Boating Industry

In addition to Kenora's strategic assets, there are several supporting resources that help boating businesses to be successful in Kenora.

Government Support for Boating

Kenora's vision as a boating destination is strongly supported by all three levels of government. Through ongoing public investment in Kenora's recreational tourism product, the City of Kenora has demonstrated a long-standing commitment to make Kenora one of Canada's most beautiful places for both residents and visitors. The region's Provincial leadership has also demonstrated a commitment to strengthen the region's ability to attract visitors and develop a robust tourism offering. The city, province and federal government have shared in funding each phase of the Kenora's Downtown Revitalization Project, provided core funding to the Lake of the Woods Business Incentive Corporation, funded major road improvements and gateway signage, and other infrastructure.



The Ontario Ministry of Tourism, Recreation and Sport has established a Tourism Investment Strategy which aims to attract private sector investment into Ontario. Support for investment projects include financial incentives, site location identification, familiarization trips, government contacts, senior level meetings, economic impact analysis, market research, tracking, and other services. The Ministry can also provide support for applications to the Northern Ontario Development Program to assist businesses, municipalities, and First Nations in new tourism related product development. Minister and MP Greg Rickford (photo above) has been a tremendous champion of Kenora's vision and has shown aggressive leadership to ensure that the vision obtains all support needed to success. Businesses in Kenora's boating and tourism sectors see how the community is investing in itself, and that gives businesses the confidence to invest their capital here as well.



"We will continue to move forward to make Kenora a place that people want to visit... The Council looks forward to working with the Lake of the Woods Development Commission and other community partners in working towards continuous improvement with all the players coming together as one team to keep building Kenora."

- City of Kenora Mayor, David S. Canfield

The Northern Ontario Heritage Fund Corporation (NOHFC)

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

Northern Business Opportunity Program - Small Business Start-up Projects:

Through this program, NOHFC offers contributions to eligible project costs related to the start-up of a business that creates jobs in Northern Ontario include, but are not limited to leasehold improvements, new or used equipment, training costs incurred with third parties, information and communications technology investments, and marketing costs. NOHFC assistance will be in the form of a conditional contribution and will generally not exceed 50% of eligible project costs up to a maximum of \$200,000.

Northern Business Opportunity Program - Business Expansion Projects

Existing businesses in Ontario that intend to expand and/or retain their operations within Northern Ontario to improve competitiveness, grow revenues and create jobs in the tourism or manufacturing sector can access this program. NOHFC assistance will generally not exceed 50% of eligible project costs up to a maximum of \$1 million per project. In exceptional circumstances, the NOHFC may consider exceeding the \$1 million maximum on a case-by-case basis. Up to 30% of the NOHFC funding may be in the form of a conditional grant with the remainder in the form of a repayable loan. Where a conditional grant is not provided the NOHFC may consider incentive term loans on a case-by-case basis.

Figure 5 Timberline Lodge



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

FedNor Northern Ontario Development Program

Since April 2006, the FedNor Northern Ontario Development Program (Fednor.gc.ca) has approved more than **\$237 million** in support of 1,205 projects that support community economic development, business growth and competitiveness, and innovation in Northern Ontario. FedNor provides financial support to viable projects led by businesses, municipalities, First Nations, and other organizations and institutions. Funding is available for projects that improve productivity, reach new markets, facilitate access to capital, foster investment, encourage entrepreneurship and cultivate industry collaboration.

Financial Resources

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

Figure 6 LOWBIC Services

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

Source: LOWBIC

In addition to larger banks, two small business lending organizations have branch offices in Kenora that serve entrepreneurs and local businesses. **Copperfin Credit Union** (www.copperfin.ca) works with business owners in Kenora to create flexible solutions to meet banking, borrowing and investment needs. **Business Development Bank of Canada** (www.bdc.ca) enables the success of Canadian entrepreneurial businesses in all industries, all economic cycles, and all markets by providing:

- Financing to protect cash flow
- Consulting services to improve profitability
- Subordinate Financing, a mix of debt and equity financing to share the risks and rewards

- Venture Capital, for expertise and know-how to build your business
- Securitization, to help finance vehicles and equipment
- Smart Tech, to businesses make information and communications technology

Marketing Resources

Ontario Tourism Marketing Partnership Corporation (OTMPC)

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

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

Tourism Northern Ontario (Regional Tourism Organization 13)

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

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

Tourism Marketing Strategy 2012-2017¹ which has set a goal to double tourism receipts in the region by 2020. Strategies for brand application, media relations, corporate partnerships & paid spokespeople, online presence, social media, and traditional marketing are all components of the region's implementation plan. The strategy forms the basis for successful working relationships among its three sub-regions of Northern Ontario and industry stakeholders, and forms one part of a future destination development plan.

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

Ontario Sunset Country

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

Tourism Kenora

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

¹ See Northern Ontario Tourism Marketing Strategy 2012-2017 available at http://www.rto13.com/downloads/Northern%20Ontario%20Tourism%20Strategy%20FINAL%20July%202029_LOW.pdf

Labour Force

The City of Kenora has a population of over 15,300 and is located within the Treaty #3 Area, home to 21 First Nations communities that have a combined population of approximately 25,000. Kenora's highly-skilled workforce is comprised of a working age population (age 25-64 years) of over 8,500 workers. Approximately 13% of workers have a trades certificate or diploma (over 1,100 workers), 22% have attained college education and 34% have completed some university education, a Bachelor's degree or higher degree.

Table 14 Kenora Tourism-Related Labour Force by Occupation, 2012

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

Source: Manfield Data Mining

The First Nations communities in the region are growing and they are one of the most important sources for accessing the region's labour force. Seven Generations Education Institute was established in 1985 as a consortium between the 10 bands of the Rainy Lake Tribal Area, with the goal of improving the economic status of band members and maintaining traditional cultural and linguistic values. The institution is based in Fort Frances, Ontario and operates satellite campuses in Thunder Bay and Kenora. Program offerings are tailored to the needs of the marketplace, and Seven Generations is skilled at developing new programs in partnership with community colleges or



universities, employers, government and other stakeholders. Programs are available to people from all walks of life, and are designed to instill a sensibility toward the cultural heritage and societal issues faced by First Nations and Aboriginal peoples.



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

Kenora Economic Development is a One-Stop Location for Workforce Development

There are several job training and skills development resources available to employers that can offset labour costs through wage subsidies, internships, placements, and other programs. LOWBIC and Kenora's economic development office has created an education and employment committee that is tasked with helping employers access all of the programs available. Contact the city's economic development officer, Jennifer Findlay, to learn about the programs that can save costs for your business.

Wage Subsidies and the Self-Employment Benefit Program

Employers in Ontario's hospitality sector have access to a \$2/hour hiring incentive when they employ youth aged 15 to 30 through the province's Summer Jobs Service. This wage subsidy will assist both private and not-for-profit businesses in hiring more summer students. The **Self-Employment Benefit Program** is designed to provide financial and entrepreneurial support for those who have been, or are on Employment Insurance (EI) or maternity/paternity leave and would like to start their own business. The SEB Program is funded by the Ontario Ministry of Training, Colleges & Universities (MTCU) and is designed to help individuals create jobs for themselves. The program provides:

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

Local Associations and Networks

Boating Ontario (www.boatingontario.ca) is an association of more than 600 marinas, marine dealers, yacht clubs, and associated companies, working together since 1967 with a common goal of promoting recreational boating in Ontario. Its members are engaged in boat sales, service and amenities for recreational boaters.

National Marine Manufacturers Association of Canada (NMMA) (www.nmma.ca) serves the best interests of its members and the recreational boating industry. NMMA represents the industry on public policy issues, advocating at provincial and federal levels to protect the interests of the marine industry and the users of products. NMMA also collects, analyzes and distributes industry, economic and market data; NMMA is the industry's primary source of recreational boating research, statistics and technical data.

Mid-Canada Marine and Powersports Dealers Association (MMPDA) (www.mmpds.ca) MMPDA hosts one of the most successful marine trade shows in Canada and also strives to focus on all issues that impact the industry. The MMPDA promotes all industry careers through attendance at conferences, career fairs and hosts an annual industry career presentation during the Mid-Canada Boat Show.

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

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

The Lake of the Woods District Property Owners Association, or LOWDPOA (www.lowdpoa.com) is a vibrant membership-driven organization focused on the sustainability of "lake life" in the region. With more than 4,000 members, LOWDPOA is one of the largest associations of its kind in the province of Ontario. Membership includes not only part time and permanent residents within the Lake of the Woods District, but also those who simply have a keen interest in protecting this beautiful

area for generations to come. LOWDPOA is active in programs ranging from: environment related initiatives, economic development in the region, member education & communication and fair taxation for waterfront property owners.



Appendix A: Supporting Statistics

Electric Service Costs

Table 15 Electricity Costs - Hydro One Networks (May 2013)

Business Customers (More than 50 kW)	
As a small business customer who typically uses more than 50 kilowatts (kW) on average per month, you are set up with a meter(s) capable of reading both kWh and kW.	
Rate Classification 750	Urban Demand
First kWh per month (adjusted usage) 750	7.8 _/kWh
Additional kWh (adjusted usage) 750-250,000	9.1 _/kWh
Delivery Fixed charge	32.32 \$/month
Delivery Volume charge	6.720 \$/kW
Delivery Volume charge (adjusted usage)	3.12 \$/kW***
Regulatory Fixed charge	0.25* \$/month
Regulatory Volume charge (adjusted usage)	0.56 _/kWh
Debt Retirement charge (metered usage)	0.70** _/kWh
Additional	Time-of-Use: Off-Peak: 6.7_ ; Mid-Peak: 10.4_ ; On-Peak: 12.4_ ; Electricity - over 250,000 kWh/year wi
Notes: * If you've enrolled with a retailer, the \$0.25 standard supply service administration charge will be deducted from the Regulatory charges on your bill. ** Communities of Bancroft, Campbellford and Eganville have their own specific rates for the Debt Retirement Charge. They are as follows: Bancroft = 0.66_ per kWh; Campbellford = 0.49_ per kWh; and Eganville = 0.60_ per kWh. *** Retail transmission rates shown have been adjusted for line losses.	

Table 16 Electricity Costs - Kenora Hydro Electric Corporation Ltd. the City of Kenora (May 2013)

General Service 50 to 4,999 kW	
All services other than those designated as residential service, municipal street lighting service. This includes combination type services where a variety of uses are made of the same service by the Customer (e.g. General Service less than 50 kVA combined with residential service). Subclasses would be: Demand less than 50 kVA - (100A @ 120/208V; 100A @ 120/240V, 60A @ 347/600V); Demand equal to 50 kVA, up to 500 kVA - (1600A @ 120/208V; 600A @ 347/600V; 600A @ 120/240V); Demand equal to 500 kVA, up to 5,000 kVA - (greater than 1600A @ 120/208V OR greater than 600A @ 347/600V and service from the 44 kV distribution system). For new installations, demand sizing is based on the main switch size in amps converted to kVA.	
Monthly Service Charge	\$516.91
Distribution Volumetric Rate	1.6470 \$/kW
Additional Distribution Charge: Rate Rider for Disposition of Deferral/Variance Accounts (2012) - effective until October 31, 2013 -0.4084 \$/kWh; Rate Rider for Disposition of Global Adjustment Sub-Account (2012) - effective until October 31, 2013, applicable only for Non-RPP Customers -0.2265 \$/kWh; Rate Rider for Disposition of Deferral/Variance Account (2013) - effective until April 30, 2014 -0.7384 \$/kWh; Rate Rider for Disposition of Global Adjustment Sub-Account (2013) - effective until April 30, 2014 Applicable only for Non-RPP Customers 0.6350 \$/kWh; Rate Rider for Disposition of Deferred PILs Variance Account 1562 _ effective until October 31, 2013 -0.4585 \$/kWh; Rate Rider for Recovery of Lost Revenue Adjustment Mechanism (LRAM) / Shared Savings Mechanism (SSM) Recovery (2012) _ effective until October 31, 2013 0.0230 \$/kWh.	
Regulatory Asset Recovery	Market Price
Retail Transmission Rate - Network Service Rate	2.4457 \$/kW
Retail Transmission Rate - Line and Transformation Connection Service Rate	0.5175 \$/kW
Wholesale Market Service Rate	0.0044 \$/kWh
Rural Rate Protection Charge	\$0.007/kWh
Standard Supply Service - Administrative Charge (if applicable)	\$0.25
Additional Regulation and Other Charge (if applicable)	Rural Rate Assistance: 0.0012 \$/kWh
Source: www.ontarioenergyboard.ca	

Natural Gas Costs

Union Gas Limited

Rate 301-Small Volume General Firm Service: Any customer in Union's Fort Frances, Western, Northern or Eastern Zones who is an end user whose total gas requirements at that location are equal to or less than 50,000 m3 per year.

Charges	Rate: 01-Jul-13 (effective date)
Total Gas Supply Charge	16.3241
Delivery, First: 100	9.7243 /m ³
Next 200	9.1998 /m ³
Next 200	8.8271 /m ³
Next 500	8.4851 /m ³
All over 1,000	8.2026 /m ³
Monthly Charge	21

Rate 310-Large Volume General Firm ServiceAny customer in Union's Fort Frances, Western, Northern or Eastern Zones who is an end-user whose total firm gas requirements at one or more Company-owned meters at one location exceed 50,000 m3 per year.

Charges	Rate: (effective date)
Total Gas Supply Charge	15.837
Delivery, First: 1,000	7.6984 /m ³
Next 9,000	6.2848 /m ³
Next 20,000	5.4786 /m ³
Next 70,000	4.9625 /m ³
All over 100,000	3.0073 /m ³
Monthly Charge	70

Table 17 Visits and Spending 2011

Destination: RTO13c Year: 2011	Origin					Length of Stay	
	Total	Ontario	Other Canada	US	Overseas	Overnight	Same-Day
Total Visits							
Total Household/Party Visits	1,534,700	1,017,600	285,200	227,400	4,500	773,200	761,500
Total Person Visits	2,296,800	1,317,700	434,400	536,400	8,300	1,297,200	999,700
Length of Stay (Person Visits)							
Overnight	1,297,200	564,500	349,800	375,900	7,000	1,297,200	-
Same-Day	999,600	753,200	84,600	160,500	1,300	-	999,700
Main Purpose of Trip (Person Visits)							
Pleasure	1,162,100	503,600	245,900	409,600	3,000	760,300	401,700
VFR	653,500	440,100	159,200	49,100	5,100	345,000	308,500
Shopping	5,200	4,500	-	700	-	4,500	700
Conventions (Personal)	20,300	20,300	-	N/A	N/A	5,100	15,200
Business	254,700	214,300	23,900	16,500	-	94,900	159,900
Meetings	13,000	-	-	13,000	-	-	13,000
Conventions & Conferences	10,100	5,500	2,500	2,100	-	6,900	3,300
Other Business	231,600	208,800	21,400	1,400	-	88,000	143,600
Other Personal	201,000	134,800	5,400	60,600	200	87,300	113,700
Quarter Trip Started (Person Visits)							
Q1 (Jan - Mar)	336,300	243,400	46,400	46,000	500	128,400	207,900
Q2 (Apr - Jun)	592,700	293,500	132,800	163,500	2,900	347,900	244,800
Q3 (Jul - Sep)	902,800	419,100	206,000	273,200	4,500	612,700	290,100
Q4 (Oct - Dec)	465,000	361,600	49,300	53,800	300	208,100	256,900
Accommodation Type (Person Visits)							
Roofed commercial	475,800	183,700	61,100	226,800	4,200	475,800	-
Hotels	198,000	132,200	39,400	25,500	900	198,000	-
Motels	89,500	33,600	11,800	43,900	200	89,500	-
Commercial cottage/cabins	192,600	7,500	6,900	175,200	3,000	192,600	-
Other roofed commercial	21,000	18,100	2,900			21,000	-
Camping/RV facilities	157,800	79,900	28,200	49,600	100	157,700	-
Private homes/cottages	635,800	280,700	266,600	85,600	2,900	635,800	-
Private homes	351,800	206,000	125,900	17,000	2,900	351,800	-
Private cottages	285,700	74,800	140,700	70,200	-	285,700	-
Other accommodation type	78,700	31,000	12,600	34,900	200	78,700	-
Number of Nights (Person Visits)							
0 nights	999,600	753,200	84,600	160,500	1,300	-	999,700
1 night	305,400	219,900	46,300	38,200	1,000	305,400	-
2 nights	368,600	206,100	128,200	31,100	3,200	368,600	-
3 nights	166,700	57,700	60,300	48,700	-	166,700	-
4 nights	90,700	8,900	21,000	60,800	-	90,700	-
5 nights	82,400	24,200	21,300	36,900	-	82,400	-
6 - 9 nights	217,600	38,300	35,200	143,500	600	217,600	-
10+ nights	65,600	9,300	37,400	16,800	2,100	65,600	-

Destination: RTO13c Year: 2011	Origin					Length of Stay	
	Total	Ontario	Other Canada	US	Overseas	Overnight	Same-Day
Number of Nights							
Total Nights	4,922,200	1,350,300	1,526,800	1,998,200	46,900	4,922,200	-
Average nights of total visits	2.1	1.0	3.5	3.7	5.6	15.1	-
Average nights of overnight visits	3.8	2.4	4.4	5.3	6.7	15.1	NULL
Number of Nights by Accommodation Type							
Nights in roofed commercial	1,810,000	325,900	332,700	1,131,300	20,100	1,810,000	-
Nights in hotels	539,300	219,800	273,800	43,900	1,800	539,300	-
Nights in motels	202,300	53,300	28,400	120,100	500	202,300	-
Nights in commercial cottage/cabins	1,028,600	24,800	18,700	967,300	17,800	1,028,700	-
Nights in other roofed commercial	39,800	28,000	11,800			39,800	-
Nights in camping/RV facilities	482,100	180,100	71,200	230,700	100	482,100	-
Nights in private homes/cottages	2,337,300	753,700	1,106,600	450,900	26,100	2,337,200	-
Nights in private homes	1,318,800	598,900	645,400	48,400	26,100	1,318,800	-
Nights in private cottages	1,018,400	154,700	461,200	402,500	-	1,018,400	-
Nights in other	292,800	90,500	16,300	185,300	700	292,900	-
Activities Participated (Person Visits)							
Festivals/Fairs	47,100	14,500	16,500	13,900	2,200	40,600	6,500
Cultural Performances	66,700	48,300	15,900	2,300	200	56,700	9,900
Museums/Art Galleries	63,200	21,300	13,300	23,000	5,600	59,000	4,200
Zoos/Aquariums/Botanical Gardens	23,800	11,900	3,300	6,700	1,900	22,800	1,100
Sports Events	36,900	20,300	12,400	3,700	500	32,000	4,800
Casinos	39,600	21,400	9,800	8,300	100	34,200	5,400
Theme Parks	9,300	7,100	1,100	1,000	100	8,600	700
National/Provincial Nature Parks	181,300	59,600	49,300	66,100	6,300	169,700	11,600
Historic Sites	106,600	26,400	15,700	58,500	6,000	100,000	6,700
Any Outdoor/Sports Activity	1,008,000	439,100	240,500	325,200	3,200	795,300	212,700
Boating	345,000	95,900	134,800	112,400	1,900	340,400	4,500
Golfing	20,000	5,600	13,700	700	-	20,000	-
Fishing	535,900	148,000	96,000	291,300	600	493,900	42,200
Hunting	134,600	118,600	5,800	10,200	-	30,300	104,200
Downhill Skiing/Snowboarding	33,500	5,900	27,600	-	-	33,500	-
Household/Party Size and Composition							
Total household/party visits	1,534,700	1,017,600	285,200	227,400	4,500	773,200	761,500
1 person (Party Visits)	580,800	461,300	44,600	73,200	1,700	194,400	386,400
2 persons (Party Visits)	527,400	312,000	120,200	93,400	1,800	293,100	234,400
3 or more persons (Party Visits)	426,500	244,300	120,400	60,800	1,000	285,700	140,800
Average party size	2.4	3.0	3.0	2.4	1.9	7.4	7.1
Party with adult(s) only (%)	86%	80%	80%	93%	86%	254%	287%
Party with children (%)	14%	20%	20%	7%	14%	46%	13%
Age of Respondents (Person Visits)							
Under 15 years	13,900	N/A	N/A	12,600	1,300	12,300	1,600
15 - 24 years old	267,400	163,100	79,400	24,700	200	164,700	102,700
25 - 34 years old	344,100	219,200	97,100	27,100	700	221,600	122,400

Destination: RTO13c Year: 2011	Origin					Length of Stay	
	Total	Ontario	Other Canada	US	Overseas	Overnight	Same-Day
35 - 44 years old	401,300	288,600	78,200	33,300	1,200	257,400	143,800
45 - 54 years old	405,700	272,900	65,900	66,300	600	221,900	183,700
55 - 64 years old	306,600	128,300	63,900	111,400	3,000	217,500	89,200
65+ years old	383,600	245,600	49,900	86,800	1,300	171,900	211,800
Age not stated	174,200	-	-	174,200	-	29,800	144,400

Source: GeoTravel Stats, Ontario Ministry of Tourism, Culture & Sport, latest data available for Kenora District is for 2008.

For the latest statistics on Kenora's visitors, see:

<http://www.mtc.gov.on.ca/en/research/rtp/rtp.shtml>

Endnotes

ⁱ Source: Environment Canada, Reading downstream of Lake of the Woods at **Winnipeg River at Pointe du Bois, Manitoba**. Rated Water quality category for 2008 to 2010: Excellent.

ⁱⁱ Source: Regional Tourism Profiles 2010, Ontario Ministry of Tourism, Culture and Sport. Figures for Northwestern Ontario Region 13c.

ⁱⁱⁱ Seasonal resident estimate based on number of part-time seasonal dwellings reported in the Census of Canada 2011 and average household size. Boating participation based on Woods District Property Owners Association (LOWDPOA) Survey of Cottage Owners, 2003.

^{iv} Figure refers to all functioning dwellings that are unoccupied by year-round residents.

^v See 2011 Lake Superior Boating Study – Results of Market Study. Last Accessed at http://files.dnr.state.mn.us/aboutdnr/reports/boating/lakesuperior2011_marketstudyresults.pdf

^{vi} Ontario Visitor Statistics, 2008, Kenora District.

^{vii} Source: Population, Housing and Economic Forecasts for the Winnipeg CMA, City of Winnipeg, April 2013. Last Accessed at: http://www.winnipeg.ca/cao/pdfs/population_forecast.pdf

^{viii} Source: Winnipeg Visitor Profile

^{ix} See Southview Inn and Bistro Success Story http://nohfc.ca/sites/default/files/success_story_files/southview_inn_and_bistro_success_story.pdf