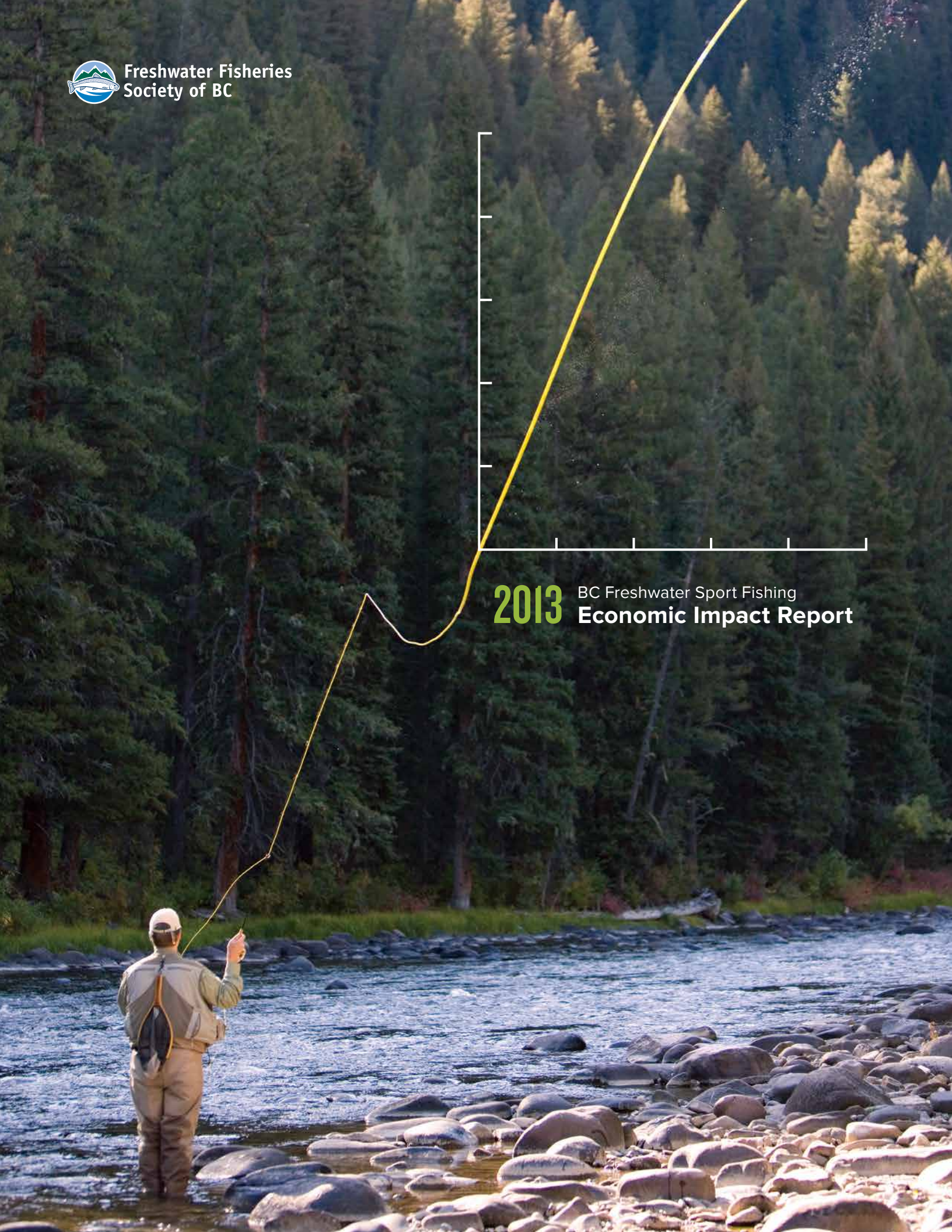




Freshwater Fisheries
Society of BC



2013 BC Freshwater Sport Fishing
Economic Impact Report

REPORT HIGHLIGHTS

Employment of
5,000

**6% MORE
ANGLERS
SINCE 2005**

**\$957
million**

Total direct, indirect
and induced impacts

**\$546
million**

Direct economic
impacts

**\$144
million**

Total provincial and
federal tax revenues

- Licence, conservation surcharge, stamp and classified water fees of \$13.9 million
- Over \$27 million in angling packages
- Over 3.8 million days fished – an average of 13 days a year per angler
- 7.5 million fish caught (58% rainbow trout): catch rate of 1.96 fish per day
- For every \$1 invested in services by the Freshwater Fisheries Society of BC, anglers spent an average of \$24

THE SECRET IS OUT.

British Columbia is one of the best places to freshwater fish in North America. After all, our province boasts over 20,000 lakes, a staggering 750,000 kilometers of streams and 24 different fish species targeted by anglers.

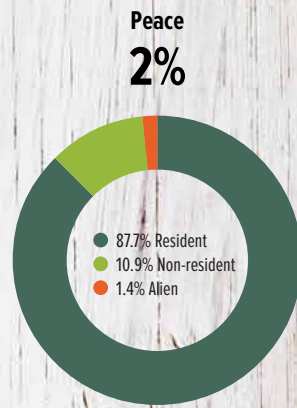
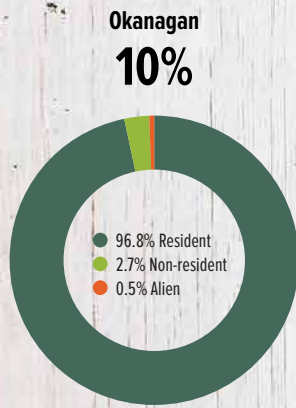
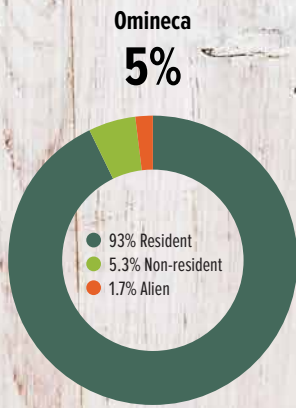
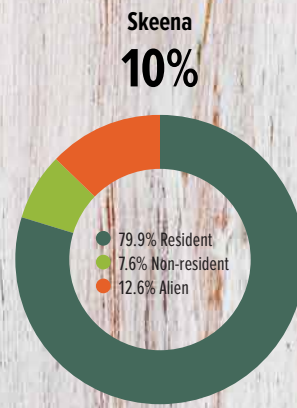
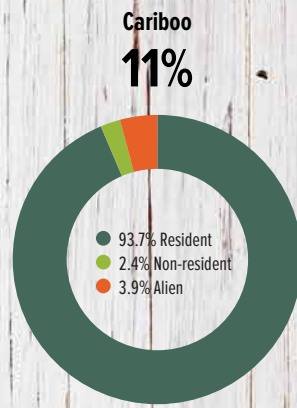
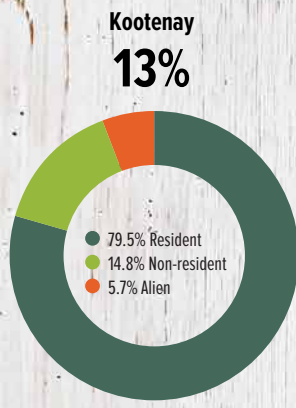
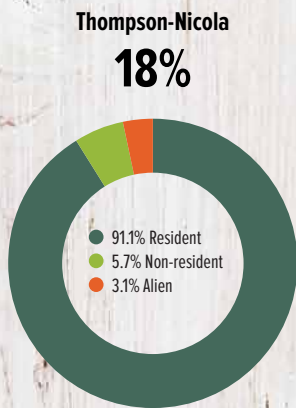
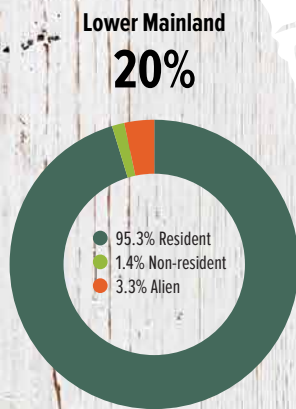
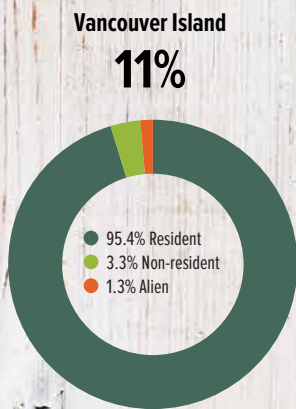
An ideal way to connect with friends, family and the tranquility of nature, it's little wonder the sport is on the rise among locals and tourists alike. As participation increases, so do sales of rods, reels, boats, fuel and much, much more. In fact, freshwater fishing generates almost a billion dollars annually in direct, indirect and induced impacts.

This growth of angling is, in part, due to the work done by the Freshwater Fisheries Society of BC in cooperation with the provincial Fisheries Management Program and the Habitat Conservation Trust Foundation.

As this summary will show, through continued enhancement of resources and conservation, freshwater fishing will reel in substantial revenue for the province well into the future.

Regional Activity Profile

There are nine provincial fisheries management regions in British Columbia. Answers to the 2010 survey provided information on the regional fishing activity of individuals, measured in fishing days. While BC residents spent the highest number of days fishing in the Lower Mainland, Canadian non-residents and other non-residents spent the highest number of fishing days in Kootenay and Skeena, respectively.



A BOATLOAD OF MONEY

That’s the abridged version of what freshwater fishing contributes to BC’s economy. The finer details involve direct, indirect and induced impacts.

Direct impacts measure the actual expenditures by anglers to businesses in the sport fishing sector. Indirect impacts measure the economic activity of those supplying goods and services, while induced impacts measure expenditures resulting from wages earned by those supplying goods and services to the sector.

In 2010 the direct economic impact was \$546 million – contributing \$164 million in value added GDP and almost \$94 million in wages and benefits.

Not bad. But it gets better. When we add indirect and induced impacts, including \$55 million in tax revenues, the total impact of freshwater fishing came to \$957 million in expenditures, GDP, salaries and wages and employment of 5,000 person years.*

Businesses that cater directly to anglers include: tackle shops and retail sporting goods stores, boat dealerships, boat and equipment rentals, marinas and campgrounds, resorts and lodges, guides and fishing charters. Businesses that indirectly serve freshwater anglers include: restaurants, motels, gas stations, ferries and airlines.

*Based on the BC multipliers developed in Horne (2008) and on the methodology used in GSGislason and Associates, Ltd. (2009).

Economic impacts from B.C.’s sport fishing sector

	DIRECT	INDIRECT & INDUCED	TOTAL
Expenditure (\$ millions)	545.7		
GDP ¹ (\$ millions)	163.8	98.3	262.0
Wages and benefits ² (\$ millions)	93.6	56.1	149.7
Employment ³ (person-years)	3,119	1,872	4,991
Taxes (\$ millions)			
Personal ⁴	15.0	9.0	24.0
Corporate ⁵	4.7	2.8	7.5
Commodity ⁶	70.2	42.1	112.3
Taxes (\$ millions)			
Federal	55.7	33.4	89.1
Provincial	34.2	20.5	54.6

1 Direct GDP estimated as 35% of angler expenditures, excluding used boats and land buildings.
 2 Direct wages and benefits estimated as 20% of angler expenditures, excluding used boats and land buildings.
 3 Direct employment derived from an estimated \$30,000 per person year (direct jobs would be about 3 times this as work is seasonal).
 4 Personal income tax is estimated as 16% of direct wages and benefits with 70% being federal, and 30% being provincial.
 5 Corporate income tax is estimated as 1% of angler expenditures, excluding used boats and land buildings, with 66% being federal, and 33% being provincial.
 6 Commodity income tax is estimated as 15% of angler expenditures, excluding used boats and land buildings, with 60% being federal and 40% being provincial.

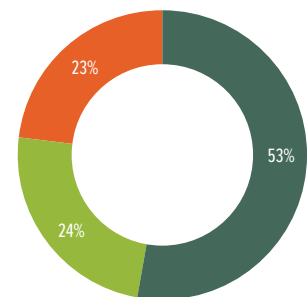
“This remarkable growth in the value of BC’s freshwater sport fisheries, even during tough economic times, demonstrates the strength and resiliency of this sector. This has not happened by accident. Sound management by the province and reinvestment of fishing licence revenues in conservation and enhancement services are the keys to this success.”

– DON PETERSON, *President*,
Freshwater Fisheries Society of BC

LET’S COMPARE, SHALL WE?

- In 2010 BC anglers spent three times more on fishing equipment than skiers did on downhill ski equipment in 2006/7. \$33 million compared to \$11.5 million respectively.
- In 2009, golf contributed about \$4 billion to the province. Freshwater fishing by comparison contributed almost \$1 billion in 2010 – 1/4 of the golf sector.
- The cruise industry in 2007 contributed an estimated \$1.5 billion to BC. Not much more than the approximately \$1 billion freshwater fishing contributed in 2010.

Allocation of angler licence revenues



- Freshwater Fisheries Society of BC (sport fishing)
- Habitat Conservation Trust Foundation (fish conservation)
- Province of BC



“Freshwater sport fishing attracts residents and visitors from all over the world to fish in BC’s pristine waters. Through their purchases, anglers support our members’ businesses including fishing lodges, resorts, angling guides, hotels, charter operators, distributors, tackle shops, dealers, boat and tackle manufacturers, regional airlines and others.

Our members feel the economic impact of freshwater sport fishing every day.”

– ROB ALCOCK, *President*, Sport Fishing Institute of BC.



“Wedding band” - troll this lure for kokanee or rainbow trout.

THE PERFECT PACKAGE

In 2010, a large part of the \$546 million in direct economic impact went to packages of various kinds.

Lodge packages were by far the biggest category, equaling almost \$15 million – over half of all package expenditures. Anglers from outside Canada spent much more than BC residents and other Canadians, with Skeena, Kootenay and Cariboo regions preferred by international anglers and the Thompson-Nicola region preferred by residents.

Full charter boat packages also brought in substantial funds and were most popular in the Lower Mainland and Skeena regions. International anglers, however, did spend a small relative amount on full charter boat packages for the Kootenay, Thompson-Nicola and Vancouver Island areas. Guided charter boat packages were purchased most in the Skeena region, followed by the Lower Mainland, Vancouver Island, and Kootenay regions.

Angling days by provincial area

	BC RESIDENT	OTHER CANADIAN	INTERNATIONAL
Vancouver Island	390,469	13,603	5,170
Lower Mainland	743,433	10,951	25,883
Thompson-Nicola	612,172	38,514	20,934
Kootenay	409,301	76,024	29,559
Cariboo	387,547	9,835	16,196
Skeena	302,464	28,613	47,712
Omineca	184,411	10,533	3,284
Okanagan	372,131	10,403	1,987
Peace	56,292	7,014	880
Total	3,458,221	205,488	151,607

WHEN WE STOCK LAKES, BC’S STOCK GOES UP

At the Freshwater Fisheries Society of BC, we receive 53% of licence revenues to stock local lakes and enhance fishing opportunities. This user-pay, non-profit delivery model is unique to North America. And it’s uniquely beneficial to BC’s economy.

How? Well, total economic benefits from the stocking program averaged \$208 million in 2010. Given that expenditures for the Freshwater Fisheries Society of BC were \$8.57 million, this equals a healthy return on investment. Every \$1 invested in fish stocking by us led to an average of \$24 in angler expenditures.



Angler demographics

AGE CATEGORY	15-20	20-24	25-34	35-44	45-54	55-64	OVER 65
# of Licenced Anglers	10,929	21,838	59,380	61,061	73,352	56,793	8,887
BC population	284,125	324,970	617,142	623,695	720,238	594,967	677,638
% of BC population with Licence	3.8%	6.7%	9.6%	9.8%	10.2%	9.5%	1.3%

2010 angler breakdown

83%
BC residents

8%
Alberta residents

2%
Other parts of Canada

2%
Washington State

5%
Other US states and Europe



TRACKING THE ELUSIVE ANGLER

Anglers who fish in British Columbia are like no others. Via surveys and a trail of detailed data, we’ve been able to discover what really makes them tick.

Probably most obvious to any angler is the fact that there are many motivating factors for participating in the sport. Catching a fish is only one of them. Fishing is relaxing. It’s a chance to get away from it all and contemplate nature. It’s a wonderful

way to spend time with friends and family. It’s also a challenge. A puzzle. This is an important part of the adventure. Human versus fish is an age-old battle of wits that continues to this day.

While those motivators appeal to all, four times as many men fish in BC than women. Regardless of gender, the majority of anglers are between 45 and 64 years old.



“Croc” - this lure can be cast or trolled.

BC ANGLER BEHAVIOUR

- 3.8 million angling days were reported in 2010.
- BC residents averaged 15 days per year of fishing, 4.5 hours per fishing day and less than 1% fished with a guide.
- International anglers averaged 7 days of fishing per year, 6.8 hours of angling per day and 25% fished with a guide.

Angler expenditures by category (whole expenditures only)

CATEGORY	EXPENDITURE (\$)
Access fees	917,046
Other costs	927,868
Other packages	1,042,988
Other travel costs	1,448,648
Boat rentals	2,818,263
Full charterboat	3,292,013
Fly-in packages	3,319,785
Ferry costs	3,348,027
Guided charterboat	5,002,293
Air costs	6,611,798
Total investments	9,006,143
Camp fees	11,825,946
Licence fees	13,899,801
Lodge packages	14,813,014
Accommodation	17,872,696
Land-buildings	23,166,408
Fishing equipment	28,787,378
Household boat costs	29,274,455
Special vehicles	38,046,601
Food	50,155,197
Travel costs	55,516,158
Camping equipment	60,162,673
Other purchases	72,765,791
Boating equipment	93,032,841
TOTAL	545,722,066

“Our freshwater sport fisheries provide substantial social, cultural and economic benefits for the province. My ministry is committed to protecting and managing this resource so it can sustain public use and enjoyment for generations to come.”

– HONOURABLE STEVE THOMSON,
*Minister, Forests, Lands and Natural
Resource Operations*



“Bead head bloodworm” - a staple for stillwater rainbow trout fly fishing.

THE CASH BEHIND THE CATCH

In addition to license fees, BC benefits economically from angling expenditures, which help support the goods and services industries around sport fishing.

Angler expenditures came to \$173 million in 2010, not including larger purchases like boats. Travel and food costs were the biggest outlays, followed by packages, which this document has already covered.

BC residents spent about \$408 per angler **per year**. Other Canadians spent about \$606 and international anglers a massive \$1,613. Further details are found in the charts below.

The ones that didn't get away

58% of all the individual fish caught in BC during 2010 were rainbow trout. Anglers reeled in a remarkable 4 million of them. Cutthroat trout came second, with over 1 million caught. That amounts to about 15% of the total 2010 catch. After these two, sockeye and kokanee were captured the most frequently, combining for about 15% of the catch.

As far as preference is concerned, rainbow trout was by far the favourite fish followed by sockeye, other salmon, cutthroat and steelhead.



Angler expenditures (\$) by residence

	BC RESIDENT	OTHER CANADIAN	INTERNATIONAL
Packages	7,143,620	2,150,746	18,175,726
Accommodation	8,028,759	4,121,656	5,722,282
Camp fees	9,274,409	1,884,776	666,762
Food	39,178,521	6,785,934	4,190,742
Travel costs	46,311,287	5,363,849	3,841,023
Ferry costs	2,957,666	190,076	200,286
Air costs	780,818	1,272,360	3,226,855
Other travel costs	872,369	411,312	164,967
Total	114,547,449	22,180,709	36,188,643

“I grew up fishing with my Dad on many Vancouver Island rivers and I want my kids and future generations to have the same opportunities that I did.”

- WILLIE MITCHELL,
LA Kings Hockey Player



“General Practitioner” - a classic for west coast steelhead fly fishing.



Catch, in 1,000 individuals, of fish targeted by anglers

SPECIES	CATCH (NUMBER OF INDIVIDUALS)
Rainbow trout	4,344,054
Cutthroat trout	1,130,195
Sockeye	644,646
Kokanee	509,378
Dolly Varden/ bull trout	244,492
Brook trout	190,569
Lake trout	167,283
Steelhead-wild	129,884
Other trout	81,158
Steelhead-hatchery	21,488

“As a life-long angler I have spent many memorable days fishing with my family and friends. Sport fishing helps connect us to each other and to our environment while supporting local businesses and the provincial economy.”

- MLA BILL ROUTLEY, Cowichan Valley

WHERE FROM HERE?

Hopefully, you’ve come to the conclusion that freshwater fishing is an activity that is not only growing in BC, but also helps the BC economy grow. 2010 expenditures were \$23 million more than in 2005, an increase of almost five percent in spite of the economic downturn in 2008 and 2009 which affected overall tourism in BC. So where does this future growth come from?

Economists separate residents and non-residents because if a BC resident spends money fishing, it’s money that most likely would have been spent in the province anyway. Spending by non-residents, however, represents an overall net gain to the province. What’s interesting is that resident anglers live in urban areas but fish in rural ones. They transfer much needed economic activity to small communities. Continued growth with both groups would be the best scenario, rather than one over the other.

Another group to consider going forward is women. In 2010, about 20% of licensed and active anglers were women. Similar results were observed in 2005. The benefits of freshwater fishing are in no way exclusively male and other markets demonstrate higher numbers. In the U.S., for example, about 25% of anglers are women. Clearly there’s room for increased female participation.

Finally, with an aging angler population, continued effort should be made to reach out to families and children – the future of the sport. Over 25,000 BC children participate in the Learn to Fish program each year and other programs, such as Fishing in the City, are helping to make fisheries close to urban centers more accessible.

WHO WE ARE

The Freshwater Fisheries Society of BC is a private, non-profit organization funded by fishing licence revenues. It executes stocking programs that support half of all recreational fishing on BC lakes, carries out sturgeon conservation services, and works with the Province and others to enhance the sport for all.

Visit gofishbc.com to obtain a full copy of the economic report or to learn more about us.





