



Fishing Product Overview

BUILDING TOURISM WITH INSIGHT

FISHING

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This profile summarizes information on the British Columbia sport fishing tourism sector. Information contained includes a demographic profile of travellers from Canada and the US who participated in either fresh or saltwater fishing, a travel profile, general information about BC anglers, information about international anglers, trends in license sales in both Canada and the US, economic impacts of the sport fishing tourism sector, and information about the supply of angling services in British Columbia.

Information in this report has been compiled from several sources, including the 2006 Travel Activities and Motivations Survey, the 2005 Survey of Recreational Fishing in Canada, the British Columbia Ministry of the Environment Fish and Wildlife Branch, the Department of Fisheries and Oceans, Pacific Region, the American Sportfishing Association, BC Stats, and the US Fish and Wildlife Service 2006 National Survey of Fishing, Hunting and Wildlife Associated Recreation.

Demographic Profile¹

DEMOGRAPHIC PROFILE OF FISHING PLEASURE TRAVELLERS

Pleasure travellers participating in the Travel Activities and Motivations Survey (TAMS) who had been to British Columbia in the past two years, were asked to indicate if they had participated in either freshwater or saltwater fishing while on a trip (in the past two years). Those who had participated in these activities were further asked if fishing had been a primary motivating factor for any of their trips.

- Among angler travellers from Canada and the US who had travelled to British Columbia at least once in the past two years, there were more males than females who either participated in or were motivated by fishing activities. The greatest gender split was observed among *motivated* Canadian travellers (70% male and 30% female). Gender differences among *participating* fishing travellers from Canada and the US were slightly more balanced compared to motivated travellers with men comprising 61% of Canadian participants and 55% of American participants (see Table 1).
- Anglers from Canada were more likely to be younger than their American counterparts. Overall, a approximately a third of both participating and motivated Canadian fishing travellers were between the ages of 18 to 34 years (34% & 30% respectively) with over half of participating Canadian and almost half of motivating travellers being younger than 45 (54.6% & 46.5% respectively).
- The age profile of American fishing travellers was slightly older with the approximately a quarter falling between 45 and 54 years of age (25% participated; 28% motivated). Four in ten participating and motivated American fishing travellers were older than 55 with less than a quarter being between the ages of 18 to 34 years of age (24% participated; 22% motivated).
- Overall, American fishing travellers were more likely to be over age 45 compared to Canadians, and motivated anglers were more likely to be over age 45 compared to participants.

¹ Unless otherwise noted, information in this report is from the 2006 Travel Activities and Motivations Survey.

- The most commonly reported household income category for all groups of fishing travellers was \$100,000 or more. This category represented 33% of participating and motivated Canadian fishing travellers, 38% of participating American anglers, and 40% of motivated Americans.
- Anglers in all groups were most likely to report that they had completed post-secondary education.

Table 1: Demographic profile of fishing travellers from Canada and the US

| Demographics of Fishing Travellers from Canada and the US who have been to BC | Canada | | US | |
|---|-------------|----------|-------------|----------|
| | Participate | Motivate | Participate | Motivate |
| Adults 18+ | 1,366,150 | 594,736 | 1,582,270 | 759,786 |
| Unweighted Numbers | 1,705 | 804 | 519 | 251 |
| Gender | | | | |
| Male | 61.0% | 69.8% | 55.0% | 61.5% |
| Female | 39.0% | 30.2% | 45.0% | 38.5% |
| Age | | | | |
| 18-34 | 33.9% | 29.8% | 23.7% | 22.1% |
| 35-44 | 20.7% | 16.7% | 11.8% | 9.3% |
| 45-54 | 24.2% | 27.5% | 25.1% | 28.4% |
| 55-64 | 12.3% | 14.0% | 21.2% | 20.7% |
| 65+ | 8.9% | 11.9% | 18.2% | 19.6% |
| Household Income | | | | |
| Under \$40,000 | 17.1% | 18.0% | 12.3% | 12.6% |
| \$40,000-\$59,999 | 13.6% | 11.2% | 13.0% | 15.0% |
| \$60,000-\$99,999 | 26.1% | 26.9% | 26.5% | 25.7% |
| \$100,000 or more | 33.2% | 32.8% | 38.0% | 39.7% |
| Not stated | 10.0% | 11.1% | 10.2% | 7.1% |
| Education | | | | |
| Less than Secondary | 9.2% | 9.0% | 2.0% | 1.2% |
| Completed Secondary | 28.0% | 32.0% | 8.2% | 7.4% |
| Some Post Secondary | 10.3% | 10.5% | 26.0% | 25.9% |
| Completed Post Secondary | 52.0% | 47.8% | 61.7% | 62.5% |
| Other | n/a | n/a | 0.3% | 0.4% |
| Not stated | 0.5% | 0.6% | 1.7% | 2.6% |

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

DEMOGRAPHICS BY SPECIFIC FISHING ACTIVITY – CANADIAN PLEASURE TRAVELLERS WHO HAVE TRAVELLED TO BRITISH COLUMBIA

- Among motivated Canadian fishing travellers who had visited British Columbia, there were a few differences between freshwater anglers compared to those who were motivated to fish in saltwater. Although in general anglers were more likely to be male compared to general Canadian travellers to BC, there was very little difference between freshwater and saltwater anglers in terms of gender (see Table 2).
- Motivated freshwater angling travellers were almost evenly split between the 18 to 34 age group (30%) and those age 45 to 54 (28%). Saltwater anglers, however, were more likely to be older with over one third (34%) between 45 and 54 and one fifth (20%) between 55 and 64. Overall, 66% of saltwater anglers were over age 45, whereas this age group represented 53% of freshwater anglers.
- Saltwater fishing travellers were slightly more likely to report household incomes over \$100,000 compared to freshwater fishing travellers (41% and 31%, respectively).
- There were very few observed differences in terms of level of education completed.

Table 2: Demographics by specific fishing activity for travellers from Canada

| Demographics of Canadian Travellers who have been to BC by Fishing Type | All Canadian Travellers who visited BC | Type of fishing (Motivated) | |
|---|--|-----------------------------|-----------|
| | | Freshwater | Saltwater |
| Total | 5,651,177 | 468,314 | 160,418 |
| Unweighted Numbers | 7,315 | 629 | 234 |
| Gender | | | |
| Male | 49.9% | 70.0% | 69.2% |
| Female | 50.1% | 30.0% | 30.8% |
| Age | | | |
| 18-34 | 31.4% | 30.2% | 19.1% |
| 35-44 | 18.8% | 17.2% | 14.8% |
| 45-54 | 21.3% | 27.5% | 33.9% |
| 55-64 | 14.9% | 12.5% | 19.7% |
| 65+ | 13.5% | 12.6% | 12.6% |
| Household Income | | | |
| Under \$40,000 | 17.6% | 19.6% | 12.7% |
| \$40,000-\$59,999 | 13.9% | 11.6% | 9.3% |
| \$60,000-\$99,999 | 27.4% | 28.1% | 22.5% |
| \$100,000 or more | 29.1% | 30.5% | 40.9% |
| Not stated | 12.0% | 10.2% | 14.6% |
| Education | | | |
| Less than Secondary | 7.2% | 9.8% | 5.8% |
| Completed Secondary | 24.9% | 29.2% | 34.9% |
| Some Post Secondary | 12.0% | 10.8% | 13.1% |
| Completed Post Secondary | 55.1% | 49.6% | 46.0% |
| Not stated | 0.7% | 0.6% | 0.2% |

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

Note: Cells with values displayed in red are based on small sample sizes (i.e. less than 50) and should be interpreted with caution.

DEMOGRAPHICS BY SPECIFIC FISHING ACTIVITY – AMERICAN PLEASURE TRAVELLERS WHO HAVE TRAVELLED TO BRITISH COLUMBIA

- Among motivated American fishing travellers who had visited British Columbia, there were only small differences between freshwater anglers compared to those who were motivated to fish in saltwater. Compared to motivated angling travellers from Canada, there was a more even gender distribution among angling travellers from the US (see Table 3).
- The age, income and education profile of American freshwater and saltwater angling travellers were very similar. There were also strong similarities between US anglers and Canadians, with the only differences being that those from the US were slightly more likely to report higher household incomes and more likely to indicate that they had completed post secondary education.

Table 3: Demographics by specific fishing activity for travellers from the United States

| Demographics of US Travellers who have been to BC by Fishing Type | All US Travellers who Visited BC | Type of fishing (Motivated) | |
|---|----------------------------------|-----------------------------|-----------|
| | | Freshwater | Saltwater |
| Total | 7,025,878 | 528,254 | 345,714 |
| Unweighted Numbers | 2,196 | 179 | 116 |
| Gender | | | |
| Male | 52.2% | 64.4% | 58.4% |
| Female | 47.8% | 35.6% | 41.6% |
| Age | | | |
| 18-34 | 21.5% | 21.7% | 25.7% |
| 35-44 | 13.6% | 9.7% | 10.5% |
| 45-54 | 21.9% | 27.3% | 25.8% |
| 55-64 | 19.7% | 20.8% | 20.4% |
| 65+ | 23.3% | 20.5% | 17.6% |
| Household Income | | | |
| Under \$40,000 | 13.0% | 16.1% | 10.5% |
| \$40,000-\$59,999 | 13.6% | 13.4% | 16.5% |
| \$60,000-\$99,999 | 27.4% | 27.5% | 22.1% |
| \$100,000 or more | 34.5% | 37.6% | 40.0% |
| Not stated | 11.6% | 5.5% | 10.8% |
| Education | | | |
| Less than Secondary | 1.6% | 1.7% | 2.0% |
| Completed Secondary | 7.9% | 7.5% | 8.3% |
| Some Post Secondary | 23.4% | 27.1% | 19.8% |
| Completed Post Secondary | 64.7% | 60.4% | 67.8% |
| Not stated | 1.9% | 2.6% | 2.0% |

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one of more nights.

Note: Cells with values displayed in red are based on small sample sizes (i.e. less than 50) and should be interpreted with caution.

DEMOGRAPHIC PROFILE OF BRITISH COLUMBIAN ANGLERS

- Every five years the Survey of Recreational Fishing in Canada collects information from fresh and saltwater anglers who purchase licenses in Canada. Data from the 2005 survey revealed that, among anglers who had purchased a license to fish in British Columbia (freshwater and saltwater), the majority were male (83% of freshwater anglers and 79% of saltwater anglers). This gender split is wider than that seen above among angling travellers (see Table 4).
- Of those who purchased licenses to fish in British Columbia freshwater in 2005, 28% were between 45 and 54 years of age. An additional 25% were between 55 and 64 years of age with a total of 68% of freshwater anglers over age 45. The age distribution among saltwater anglers was similar with 26% between 45 and 54, and 24% between 55 and 64. Overall, 63% of saltwater anglers were over age 45.
- Among freshwater anglers those who also fished in British Columbia tidal waters had slightly higher incomes with 48% reporting household incomes over \$80,000 compared to 37% of anglers fishing only in freshwater in the same income bracket.

Table 4: Demographic profile of BC anglers, 2005

| Demographics of BC Residents by Fishing Type | Freshwater | | Saltwater | |
|--|------------|---------|-----------|---------|
| | Number | Percent | Number | Percent |
| Total active anglers | 270,836 | 100.0% | 276,191 | 100.0% |
| Gender | | | | |
| Male | 224,100 | 82.7% | 218,513 | 79.1% |
| Female | 46,736 | 17.3% | 57,678 | 20.9% |
| Age | | | | |
| under 20 | 3,347 | 1.2% | 40,937 | 14.8% |
| 20-24 years | 6,573 | 2.4% | 4,436 | 1.6% |
| 25-34 years | 26,245 | 9.7% | 16,275 | 5.9% |
| 35-44 years | 50,727 | 18.7% | 41,279 | 14.9% |
| 45-54 years | 76,077 | 28.1% | 72,105 | 26.1% |
| 55-64 years | 66,295 | 24.5% | 65,976 | 23.9% |
| 65 years and over | 41,572 | 15.3% | 35,183 | 12.7% |
| Household Income ¹ | | | | |
| Under \$20,000 | 13,072 | 6.9% | 2,533 | 5.7% |
| \$20,000 to \$39,999 | 29,987 | 15.8% | 4,388 | 9.9% |
| \$40,000 to \$59,999 | 39,836 | 21.0% | 7,714 | 17.5% |
| \$60,000 to \$79,999 | 37,354 | 19.7% | 8,399 | 19.0% |
| \$80,000 or more | 69,840 | 36.7% | 21,144 | 47.9% |

Source: 2005 Survey of Recreational Fishing in Canada. Included in this table are all anglers who purchased a license to fish in BC and reported that they fished one or more days in the province.

1. Calculations are based on valid responses only. No response, refused and don't know have been removed.

2. The question on household income was not asked on the survey for saltwater anglers. The results shown are based on freshwater anglers who reported also fishing in BC tidal waters in 2005.

Travel Profile

TRAVEL BY CANADIAN AND AMERICAN FISHING PLEASURE TRAVELLERS

- Of the estimated 5.6 million Canadian travellers who travelled within British Columbia in the past two years, nearly 1.4 million (24%) participated in either freshwater or saltwater fishing while travelling. Nearly 600,000 (11%) stated that fishing was the primary reason for at least one overnight trip (see Table 5).
- Travellers from the US were only slightly less likely to participate in either fresh or saltwater fishing while on a trip with 23% stating that they had participated and 11% indicating that fishing was a primary motivating factor for travelling.
- Anglers from both Canada and the US were more likely than the general travellers to British Columbia from each country to be frequent travellers with five or more trips in the past two years. Overall, 70% of both participating and motivated angling travellers from Canada, and 77% of participating and 76% of motivated travellers from the US took five or more overnight trips.
- Among Canadian fishing travellers, British Columbia was given a very high rating as an appealing destination (score of eight or higher on a ten point scale) more frequently than the general Canadian traveller to British Columbia. A total of 92% of both participating and motivated fishing travellers from Canada provided the highest rating. The appeal of BC among angling travellers from the US, however, was slightly lower than among all American travellers who had visited BC. Overall, 75% of participating and 76% of motivated American angling travellers provided the highest ratings.
- Perhaps not surprisingly, all angler groups were more likely to travel in the summer compared to the general traveller to British Columbia from both Canada and the US. Angling travellers were, however, also more likely to travel in the winter.

Table 5: Travel profile of Canadian and Americans fishing travellers

| | Canada | | | US | | |
|--|-------------------------------|-------------|----------|-------------------------------|-------------|----------|
| | All Travellers who Visited BC | Participate | Motivate | All Travellers who Visited BC | Participate | Motivate |
| Total | 5,651,177 | 1,366,150 | 594,736 | 7,025,878 | 1,582,270 | 759,786 |
| Unweighted Numbers | 7,315 | 1,705 | 804 | 2,196 | 519 | 251 |
| Total number of out-of-town pleasure trips taken in past two years | | | | | | |
| One | 6.9% | 4.9% | 4.6% | 3.3% | 1.3% | 0.0% |
| Two | 11.8% | 8.0% | 9.3% | 8.7% | 5.8% | 5.1% |
| Three | 11.9% | 9.0% | 7.8% | 9.5% | 4.6% | 5.5% |
| Four | 11.5% | 8.2% | 8.3% | 11.7% | 10.5% | 11.9% |
| Five Or More | 57.9% | 69.9% | 70.0% | 65.4% | 76.8% | 75.7% |
| Not Stated | 0.0% | 0.0% | 0.0% | 1.3% | 1.1% | 1.8% |
| Appeal Of British Columbia - Rated on a scale of 1 to 10 | | | | | | |
| 8 to 10 | 87.5% | 91.8% | 91.7% | 75.7% | 74.8% | 75.6% |
| 4 to 7 | 9.6% | 7.1% | 6.8% | 18.2% | 20.6% | 19.5% |
| 1 to 3 | 1.1% | 0.7% | 0.8% | 2.6% | 2.7% | 2.2% |
| Don't Know | 0.6% | 0.1% | 0.1% | N/A | N/A | N/A |
| Not Stated | 1.2% | 0.4% | 0.6% | 1.2% | 1.3% | 1.9% |
| Season travelled | | | | | | |
| Summer | 89.9% | 95.4% | 96.6% | 87.7% | 93.6% | 92.8% |
| Winter | 71.0% | 75.2% | 73.5% | 77.4% | 83.8% | 81.0% |

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one or more nights.

Note: Cells with values displayed in red are based on small sample sizes (i.e. less than 50) and should be interpreted with caution.

OTHER DESTINATIONS VISITED

- Fishing travellers from British Columbia were most likely to indicate that they had also travelled to a destination in the US (52% participating; 53% motivated) and to Alberta (51% participating; 58% motivated) in the past two years. Those from all of Canada were also most likely to select the same destinations for their travel, although both participating and motivated fishing travellers selected Alberta most often (63% participating; 66% motivated) over the US (58% participating; 59% motivated).
- Fishing travellers from the US who had travelled to British Columbia in the past two years were most likely to have also travelled to Mexico or the Caribbean (46% participating; 51% motivated).

OTHER ACTIVITIES (OUTDOOR AND CULTURAL) PARTICIPATED IN

- Information from the 2006 Travel Activities and Motivation Survey showed that other activities that involved boating and water were key leisure time travel pursuits among participating and motivated fishing travellers who visited British Columbia in the past two years (see Table 6).
- The profile of other activities was very similar for both fishing travellers from British Columbia and Canada. Overall, however, there were some key differences when these two groups are compared to fishing travellers from the US. American fishing travellers were most likely to also include stroll in a city to see buildings (56% of participating fishing travellers and 53% of motivated fishing travellers) and a visit to a historic site or building (55% participated and motivated US fishing travellers).
- Among Canadian fishing travellers top activities included swimming in lakes (59% participating and 52% motivated), while for British Columbians, participating in swimming was slightly lower (51% participating and 47% motivated fishing travellers from BC). Sunbathing or sitting on a beach was nearly as popular with Canadians (56% participating and 47% motivated) and British Columbians (53% participating and 44% motivated).

Table 6: Other outdoor and cultural activities participated in by fishing travellers

| Activities | BC | | Canada | | US | |
|----------------------------------|-------------|----------|-------------|----------|-------------|----------|
| | Participate | Motivate | Participate | Motivate | Participate | Motivate |
| Swimming In Lakes | 50.5% | 46.8% | 58.6% | 51.6% | 36.7% | 31.9% |
| Sunbathing/Sitting On A Beach | 53.4% | 44.1% | 55.6% | 47.2% | 46.8% | 43.5% |
| Stroll A City To See Buildings | 43.6% | 31.1% | 48.8% | 38.3% | 55.7% | 53.4% |
| Motor Boating | 40.2% | 41.8% | 43.5% | 40.2% | 31.0% | 34.4% |
| Nature Park- National/Provincial | 34.5% | 29.5% | 40.9% | 35.8% | 53.3% | 50.7% |
| Historic Site/Buildings | 37.4% | 34.4% | 40.0% | 34.4% | 55.3% | 55.4% |
| Hiking - Same Day Excursion | 38.3% | 32.7% | 39.5% | 31.1% | 36.8% | 34.8% |
| Swimming In Oceans | 39.7% | 34.5% | 39.0% | 35.3% | 42.2% | 37.7% |
| Golfing - Occasional Game | 23.9% | 24.2% | 33.5% | 34.7% | 25.4% | 26.8% |
| Well Known Natural Wonders | 26.7% | 22.7% | 33.4% | 29.2% | 49.5% | 51.9% |
| Farmers' Markets/ Country Fair | 31.3% | 23.7% | 31.3% | 23.8% | 42.6% | 43.4% |
| Museum - History/Heritage | 28.9% | 26.1% | 30.7% | 25.9% | 41.2% | 43.6% |
| Other Historic Sites/Buildings | 29.6% | 23.4% | 30.6% | 24.3% | 48.7% | 47.9% |
| Wildlife - Land Based Animals | 21.6% | 19.3% | 25.1% | 20.7% | 40.1% | 37.2% |
| Zoos | 15.0% | 14.9% | 22.4% | 20.3% | 35.2% | 42.7% |
| Wildlife - Whale/Marine | 13.7% | 13.3% | 17.6% | 15.2% | 39.6% | 41.3% |

Source: Travel Activities and Motivations Study 2006; special analysis by Tourism British Columbia. Table includes those who have visited British Columbia (at least once) in the past two years on an out-of-town pleasure or vacation trip of one of more nights.

Note: Cells with values displayed in red are based on small sample sizes (i.e. less than 50) and should be interpreted with caution.

ACCOMMODATION AND TRAVEL INFORMATION SOURCES

- According to the 2005 Survey of Recreational Fishing in Canada, freshwater anglers from outside of British Columbia reported that they would make an average of 2.1 trips to BC in 2005 and stay 12.1 days. Those from the US reported making the most frequent trips with an average of 2.8 trips lasting an average of 14.4 days. Saltwater anglers took slightly more trips and stayed slightly longer; average of 2.6 trips and 12.2 days. For tidal water anglers, however, those from Canadian provinces other than BC took the most trips (3.2) and stayed the longest (16.3 days). This was particularly true of those from Alberta (average 3.7 trips and 17.7 days) and Quebec (average 4.6 trips and 15.9 days).
- Information from the 2005 Survey of Recreational Fishing in Canada also showed that 31% of American freshwater anglers who purchased licenses to fish in British Columbia stated that they stayed at a fishing lodge, resort or camp. Among those from other international countries, 25% chose these types of accommodation. Thirty percent of those who fished in the Cariboo region also claimed to have stayed at a lodge, resort or camp, compared to only 7% of freshwater anglers who fished in either Vancouver Island or the Kootenay Rockies.
- The survey also asked freshwater anglers about the sources of information they used to find out about British Columbia's fishing lodges, resorts and camps. The most frequently cited source was friends as cited by 72% of all those who used these facilities. Friends and family were also the most commonly cited source of general fishing information as stated by 29% of all freshwater anglers.

General Angler Information

ANGLER NUMBERS AND ORIGIN - FRESHWATER

- An estimated 270,875 recreational anglers fished in British Columbia freshwaters in 2005. Of these freshwater anglers, 62,800 (23%) also fished in British Columbia tidal waters in the same year (see Table 7).

- The majority of freshwater anglers fishing in British Columbia were residents of BC (78%). Among non-resident freshwater anglers, 10% were from the US, and 8% were from Alberta. Of those from the US, 45% were from Washington, 12% from California, and 8% from Oregon.
- Freshwater anglers who purchased licenses in British Columbia were most likely to fish in the Thompson Okanagan region (34% of anglers indicated they fished on a waterbody in this region). This was followed by Northern British Columbia with 20% of all licensed anglers and Vancouver, Coast and Mountains at 18% (Table 2). Among freshwater anglers from BC, 39% fished in the Thompson Okanagan region. The Kootenays' were more likely to be a fishing destination for those from Alberta and the Prairie provinces, whereas American anglers were more likely to fish in the Cariboo region.

Table 7: Region fished in 2005 by angler origin – freshwater

| Origin | Vancouver Island | Vancouver ,Coast & Mountains | Kootenay Rockies | Cariboo Chilcotin Coast | Thompson Okanagan | Northern British Columbia | Number | % of Total |
|---------------------|------------------|------------------------------|------------------|-------------------------|-------------------|---------------------------|----------------|---------------|
| British Columbia | 13.0% | 20.0% | 14.5% | 16.7% | 38.5% | 18.1% | 211,400 | 78.1% |
| Alberta | 4.8% | 5.4% | 44.6% | 9.9% | 11.3% | 33.9% | 22,755 | 8.4% |
| Prairies (SK & MB) | 0.0% | 30.1% | 39.8% | 9.7% | 25.2% | 4.9% | 1,215 | 0.4% |
| Ontario | 1.9% | 26.6% | 1.9% | 5.7% | 26.6% | 43.0% | 3,101 | 1.1% |
| Quebec | 0.0% | 0.0% | 0.0% | 0.0% | 50.0% | 50.0% | 118 | 0.0% |
| Atlantic provinces | 0.0% | 66.7% | 33.3% | 0.0% | 0.0% | 0.0% | 177 | 0.1% |
| Territories | 0.0% | 0.0% | 28.2% | 0.0% | 7.0% | 85.8% | 839 | 0.3% |
| US | 9.0% | 14.6% | 20.4% | 26.6% | 22.9% | 13.7% | 27,792 | 10.3% |
| Other International | 33.2% | 16.1% | 3.3% | 20.7% | 15.7% | 40.2% | 3,438 | 1.3% |
| Total | 11.9% | 18.3% | 17.5% | 17.0% | 34.0% | 19.7% | 270,836 | 100.0% |

Source: 2005 Survey of Recreational Fishing in Canada.

ANGLER NUMBERS AND ORIGIN - SALTWATER

- A parallel survey for saltwater recreational anglers found determined that there were approximately 298,945 anglers fishing British Columbia's tidal waters in 2005, and 84,295 (28%) also fished in British Columbia's freshwater in the same year.
- The majority of saltwater anglers were also from British Columbia (64%), although the percentage of saltwater anglers from the US was considerably higher at 21%, while Alberta saltwater anglers made up 10% of the total. Anglers from the US were typically from Washington (50% of the US saltwater anglers), California (13%), and Oregon (8%).

BC ANGLER EXPERIENCE AND MOTIVATION

- According to the 2005 Survey of Recreational Anglers, 45% of rated the quality of recreational fishing in British Columbia as either very good or excellent, with an additional 32% stating that the fishing was good.
- Overall, 56% of all freshwater anglers reported fishing 20 or more years in British Columbia. The number of freshwater anglers who reported fishing 20 or more years in BC tidal waters was considerably lower at 24%. Nearly half (48%) of all saltwater anglers reported fishing between 1 and 5 years in BC (see Table 8).
- Among freshwater anglers, the average of total number of years spent fishing in British Columbia freshwater varied considerably by origin of angler. Those Quebec had the highest average number of years fishing. and also spent the most days fishing in BC freshwater in 2005. Among saltwater anglers, BC residents had both the longest average number of years fishing and the most days fishing in 2005 (Table 4).

Table 8: Average number of years overall and days in 2005 fishing in BC by angler origin

| Origin | Freshwater | | Saltwater | |
|------------------------|-----------------------|------------------------------|-----------------------|------------------------------|
| | Average Years Fishing | Average Days Fishing in 2005 | Average Years Fishing | Average Days Fishing in 2005 |
| British Columbia | 27.0 | 14.8 | 15.0 | 10.5 |
| Alberta | 11.0 | 7.4 | 6.1 | 4.3 |
| Prairies (SK & MB) | 3.8 | 3.4 | 3.0 | 2.8 |
| Ontario | 2.1 | 3.4 | 4.9 | 3.1 |
| Quebec | 35.0 | 19.5 | 1.7 | 1.8 |
| Atlantic provinces | 2.3 | 11.7 | 0.9 | 1.6 |
| Territories | 14.1 | 4.9 | 2.9 | 2.4 |
| US | 8.7 | 5.7 | 5.4 | 4.3 |
| Other International | 4.1 | 8.0 | 10.6 | 4.0 |
| Overall average | 23.0 | 13.1 | 11.3 | 8.0 |

Source: 2005 Survey of Recreational Fishing in Canada.

- Freshwater anglers from British Columbia, Alberta and the Prairies were more likely to describe themselves as an average angler, whereas those from the US and other International countries were more likely to indicate that they were an experienced angler. Among saltwater anglers, 37% indicated that they considered themselves to be an average angler.
- When asked about their reasons for fishing, freshwater anglers were most likely to mention fishing to enjoy nature and to relax. This was the case regardless of origin or the region in which they fished. Similar questions were not asked of saltwater anglers.
- Overall, 89% of all freshwater anglers stated they would return to fish the following year. Among freshwater anglers who also fished in tidal waters, 21% indicated they planned to return to fish the next year.
- Estimates from the US Fish and Wildlife Service 2006 National Survey of Fishing, Hunting and Wildlife-Associated Recreation indicate that 30 million US residents over the age of 16 participated in fishing activities. Freshwater anglers outnumbered saltwater anglers with 25.4 million anglers reporting fishing in freshwater lakes and rivers, and 7.7 million fishing in tidal waters. In total all anglers spent 517 million days fishing and participated in 403 million trips. Freshwater anglers spent 433 million days fishing and took 337 million trips, while saltwater anglers fished a total of 86 million days and participated in 67 million trips.

International Visitors Participating in Fishing Activities

- For the 2007 International Travel Survey overseas travellers were asked to indicate whether anyone in their travel party had participated in fishing on their trip. Among those who had spent at least one night of their trip in BC, 3% indicated that fishing was part of their trip. This represents an estimated 33,000 international visitors to the province.

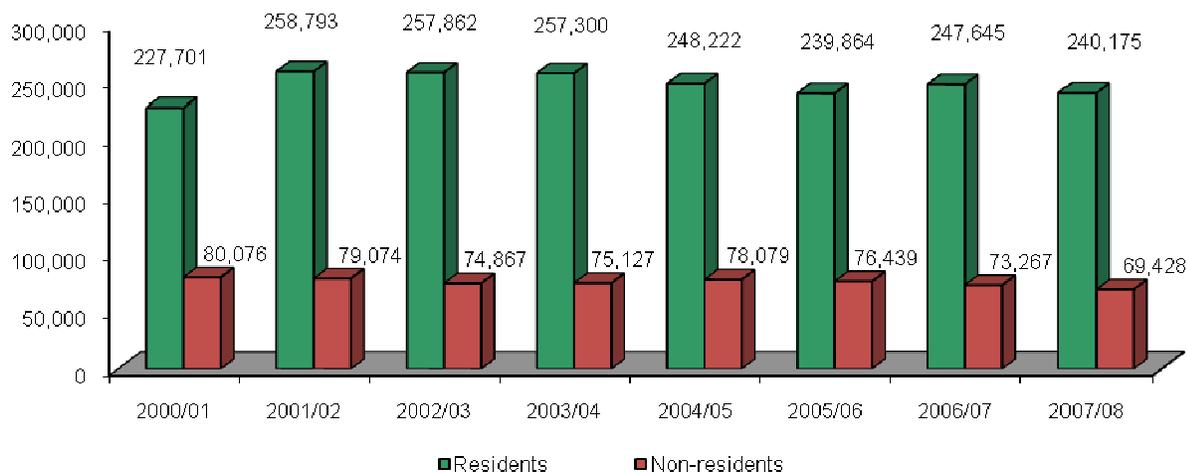
Trends – License Sales

RECREATIONAL ANGLER LICENSE SALES – CANADA

- Figures from the British Columbia Ministry of the Environment, Fish and Wildlife Branch showed that during the months of April through July of 2007, a total of 176,402 freshwater licenses were sold permitting anglers to fish in British Columbia rivers and lakes. Of these, the majority (156,254 licenses or 89% of the total) were for residents of BC. Only 12% were sold to residents of other Canadian provinces or to residents of other countries (7% and 5%, respectively).
- Overall, freshwater license sales for 2007 decreased 2% compared to the same period in 2006. While sales among British Columbian residents decreased only slightly (-1%), sales among residents of other Canadian provinces increased 5%, and sales among residents of other countries fell more sharply (-13%).

- In 2007/08, a total of 240,175 Pacific tidal water licenses were sold to resident anglers, while non-resident anglers purchased a total of 69,428 licenses.
- Among resident saltwater anglers, 49% purchased annual licenses for the 2007/08 year. Non-resident anglers were most likely to purchase a 5-day license, with 33% choosing this short-term license.
- During the period between 2000/01 and 2007/08, tidal water license purchases among non-resident anglers have decreased by 13%.

Pacific Region Tidal Water License Sales by Year



Source: Pacific Region Stats – Annual comparison of Sales Entered into the Tidal Waters Sportfishing (TWS) Database and National Recreational On-Line System (NRLS)

RECREATIONAL ANGLER LICENSE SALES – US

- Figures available from the American Sport fishing Association² indicated that 27.8 million state fishing licenses (both freshwater and saltwater licenses are combined) were purchased by anglers in 2006. This is a decrease of 1.2% compared to 2005. License sales across the US have shown small decreases year over year in each of the past five years, with the exception of 2004 in which there was a 2.1% increase compared to 2003. Overall, license sales have declined 5.4% during the period from 2001 to 2006.
- The top five states in terms of license sales were California, Texas, Minnesota, Florida, and Wisconsin. Combined, these states comprised over 25% of all license sales throughout the US.

Economic Impact of the Fishing Tourism Sector

GDP, EMPLOYMENT AND OVERALL SPENDING – CANADA AND US

- During the April through July 2007 period, total Canadian revenue from freshwater license sales was \$5.1 million. Overall, the sale of saltwater fishing licenses for 2007/08 generated over \$6.4 million in revenue.³ This represents a decrease of 3% compared to the previous year when license revenue was over \$6.6 million.
- Previous estimates from BC Stats indicated that the sportfishing sector in British Columbia generated a total GDP of \$248 million in 2005.⁴ By 2005, GDP in the sport fishing industry had fallen to slightly below the 1984 level, and

² Available at http://www.asafishing.org/asa/statistics/participation/license_sales.html

³ Includes, license fees, fees collected for the Pacific Salmon Conservation (PSF) Stamp, and all applicable GST.

⁴ Calculated in constant 1997 dollars. The source for all BC GDP and employment information in this section is British Columbia's Fisheries and Aquaculture Sector, 2007 Edition, prepared by BCStats for the BC Ministry of the Environment.

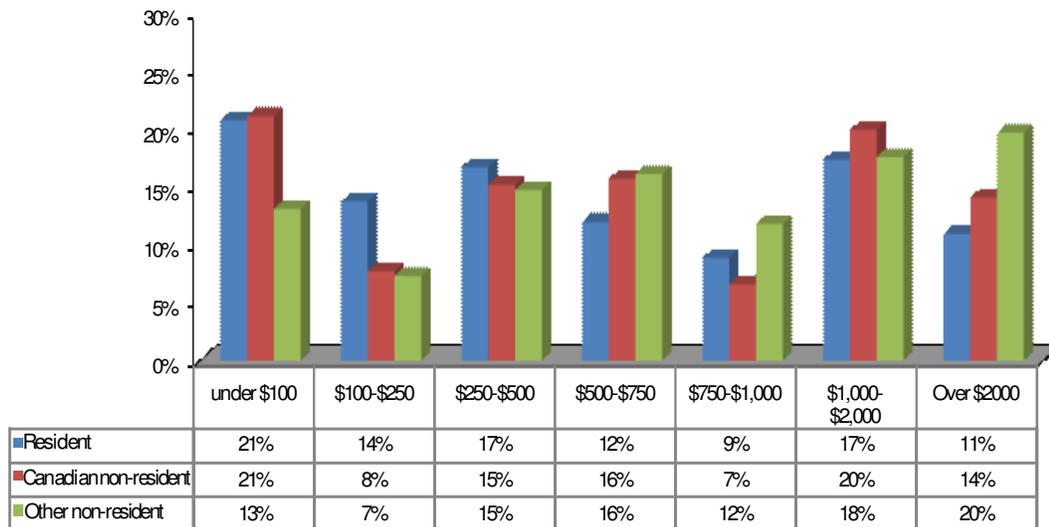
although a 1% advance was made between 2004 and 2005, the report describes a general downturn in both the saltwater and freshwater sportfishing sectors.

- BC Stats also estimated that non-resident anglers who travelled to British Columbia, contributed \$46 million to GDP as a result of other activities they participated in while visiting the province. Overall the sportfishing sector in BC resulted in employment for approximately 7,700 people. Just over half of these jobs (55%) were attributed to saltwater fishing while the remainder (46%) related to freshwater fishing.
- According to the US Fish and Wildlife Service 2006 National Survey of Fishing, Hunting and Wildlife-Associated Recreation, American anglers spent \$17.9 billion on fishing trip related expenses and an additional \$27.5 billion on equipment, supplies, and other fishing related expenses. Travel expenditures for non-resident anglers only were reported to be \$4.5 billion, while other expenses summed to \$3.6 billion. Of the total expenditures, approximately 24% was attributed to saltwater fishing.
- Data from the American Sportfishing Association indicated that the sportfishing sector employed over 1 million people in 2006, with 263,898 employed in saltwater fishing.

RESIDENT AND NON-RESIDENT ANGLER EXPENDITURES

- Data from the 2005 Survey of Recreational Fishing in Canada indicated that freshwater anglers from all origins spent an average of \$883 on fishing related expenses while in British Columbia. This differed from a high of \$1,168 among non-resident anglers from outside of Canada to a low of \$832 among BC resident anglers. The graph below provides additional details on angler spending by origin and shows that although the greatest number of resident and other Canadian anglers spent less than \$100, a substantial number of residents (28%) and Canadian non-residents (34%), plus a larger percentage of anglers from other countries (38%) spent over \$1,000.⁵

2005 Spending in British Columbia by Angler Origin (Freshwater)



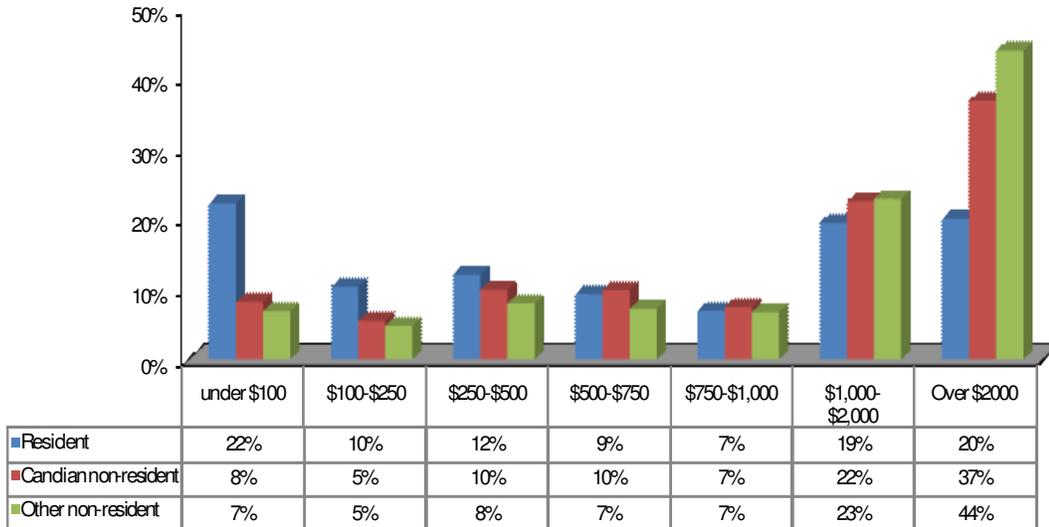
Source: 2005 Survey of Recreational Fishing in Canada.

- Among anglers who fished in British Columbia's tidal waters, the average expenditure climbed to \$1,408 on fishing related expenses while in British Columbia. Once again, non-resident anglers, in particular those from outside Canada had the highest average spending at \$1,972, while resident anglers had the lowest average expenditures

⁵ Calculations are based on total angler spending in British Columbia and do not include major expenses (boat purchases, land, etc). Included are expenditures on packages, travel expenses, supplies, licenses and access fees.

at \$1,137. Compared to freshwater anglers, there was a considerably higher proportion spending over \$1,000 with 39% of residents, 59% of Canadian non-residents, and 67% of other non-residents in this category.

2005 Spending in British Columbia by Angler Origin (Saltwater)



Source: 2005 Survey of Recreational Fishing in Canada.

- Further detail on angler expenditures shows that, with the exception of anglers from Quebec and the Territories, freshwater anglers travelling to British Columbia from other locations have higher than average spending with the highest spending on fishing related expenses among those from other international locations. Among saltwater anglers, only those from Quebec and the Atlantic provinces report lower average spending compared to residents. The highest average spending for saltwater anglers was among those from the Territories (see Table 9)

Table 9: Total BC angling expenditures by origin

| Origin | Average Expenditure | |
|---------------------|---------------------|------------|
| | Freshwater | Saltwater |
| British Columbia | \$831.52 | \$1,136.87 |
| Alberta | \$981.70 | \$1,894.66 |
| Prairies (SK & MB) | \$1,373.53 | \$1,332.30 |
| Ontario | \$1,186.11 | \$1,721.54 |
| Quebec | \$397.69 | \$924.51 |
| Atlantic provinces | \$1,336.34 | \$731.84 |
| Territories | \$472.81 | \$2,701.43 |
| US | \$1,086.10 | \$1,971.67 |
| Other International | \$1,923.73 | \$2,468.89 |

Source: 2005 Survey of Recreational Fishing in Canada.

Businesses and Services for the British Columbia Fishing Tourism Sector

- In 2007 the British Columbia Ministry of the Environment completed an inventory that included information on the number of businesses supplying services for the BC Fishing Tourism Sector. Over one third (36%) of these businesses were supplying services directly related to angling, including guiding, charters, and outfitting. An additional 22% were supplying accommodations services for anglers, while 16% provided retail services that

specialized in fishing equipment and supplies. The results of this inventory have been broken down into each of BC's six tourism regions (see Table 10).

- Overall, one third (33%) of these businesses were located in the Vancouver Island region and one quarter (25%) in the Vancouver, Coast and Mountains region.

Table 10: Primary services offered by tourism region

| Primary Service Offered | Vancouver Island | Vancouver, Coast & Mountains | Kootenay Rockies | Cariboo Chilcotin Coast | Thompson Okanagan | Northern British Columbia | Number | % of Total |
|-------------------------------|------------------|------------------------------|------------------|-------------------------|-------------------|---------------------------|--------------|-------------|
| Angling services ¹ | 47.5% | 39.2% | 24.8% | 13.7% | 13.4% | 39.9% | 566 | 35.9% |
| Accommodations | 18.6% | 13.6% | 6.9% | 57.3% | 29.9% | 21.0% | 339 | 21.5% |
| Retail | 11.0% | 14.3% | 34.7% | 12.2% | 20.3% | 17.3% | 244 | 15.5% |
| Clubs & associations | 4.3% | 10.1% | 16.8% | 6.1% | 13.4% | 7.0% | 129 | 8.2% |
| Boat / marine services | 10.9% | 9.3% | 2.0% | 0.0% | 8.0% | 2.1% | 115 | 7.3% |
| Not defined | 4.1% | 5.5% | 10.9% | 6.1% | 8.0% | 7.8% | 96 | 6.1% |
| Transportation | 1.4% | 1.8% | 1.0% | 1.5% | 2.7% | 2.1% | 28 | 1.7% |
| Boating services ² | 1.0% | 1.0% | 1.0% | 0.0% | 2.7% | 0.4% | 16 | 1.0% |
| Other | 1.4% | 5.3% | 2.0% | 3.1% | 1.6% | 2.5% | 43 | 2.7% |
| Total | 32.7% | 25.3% | 6.4% | 8.3% | 11.9% | 15.4% | 1,576 | 100% |

Source: British Columbia Ministry of the Environment and Tourism BC inventory of wilderness tourism operators, 2007

1. Includes guides, charters, and outfitters.

2. Includes charters and general boating.

For more information contact:

TOURISM BRITISH COLUMBIA, RESEARCH & PLANNING

3rd Floor, 1803 Douglas St., Victoria, BC CANADA V8T 5C3

Phone: (250) 387-1567 Fax: (250) 356-8246

Email: research@tourismbc.com Web site: www.tourismbc.com