



Canadian Tourism
Commission

Commission canadienne
du tourisme

Sport Fishing and Game Hunting in Canada

An Assessment on the Potential International Tourism Opportunity

CTC Research & Evaluation
October 2012

Summary:

Canada's vast land and beautiful wilderness offers amazing landscapes and an unprecedented variety of outdoor activities. Its lakes, rivers and rugged coastlines are prime sport fishing grounds, and from its inland central forests, to the Rockies in the west, to the pure expanse of vast arctic plains, are home to some of the best outdoor activities ever experienced. This has made Canada a year-round, season to season ground for outdoor enthusiasts from all over the world.

This secondary research aims to provide an assessment on the potential international tourism opportunity of sport fishing and game hunting in Canada. A gap in recent research studies present however a challenge in providing a comprehensive assessment from a national perspective. Various studies produced by provincial jurisdictions do help paint a fragmented picture and despite some gaps, confirm that sport fishing and game hunting is already significant, helping to power tourism and the economy during off-peak seasons, and to parts of Canada that normally receive fewer tourism benefits. Sport fishermen and game hunters assist in generating economic prosperity. They not only purchase gear, trucks and boats – they also fill their gas tanks and coolers. They stay at motels and resorts. These expenditures then ripple through the economy generating more impact through the retail chain. For many communities, sport fishing and hunting dollars keep them afloat even in hard economic times. Without the steadfast economic input from them, rural businesses that rely on tourism, would suffer significantly otherwise.

Sport fishing and game hunting in Canada could mean potential bigger business, particularly from the US market. Based on the Travel Motivation and Attitudes Survey (TAMS) profiles on fishing and hunting produced in 2006, over the period of 2004 to 2005, 9.2 million adult Americans went hunting while on an out-of-town trip of one or more nights while 32.1 million went fishing. These results demonstrate that there is a great potential tourism opportunities to tap-in. Like baseball and hockey, these outdoor activities are an American tradition (40 million) shared by young and old, rich and poor, regardless of social or economic status. They are healthy activities for them, steeped in their heritage as it is to Canadians, touching the most important aspects of their lives, like families and friends, and a sense of stewardship for all things wild. As reported by the *Outdoor Industry Association* from the United States, in 2007, Americans enjoying sport fishing and hunting spent \$58.6 billion supporting 509,000 jobs and generated \$7.6 billion in Federal, State and Local taxes. In addition, the ripple effect created from the direct spending by sport fishing and game hunters generated an additional \$159.7 billion in spending and 1.2 million jobs. Canada has only tapped in a small fraction of the avid game hunters and enthusiasts for sport fishing from the US.

While Canada is a close by option for many American outdoor enthusiasts, Canada could capture a bigger share of the American pie. A study undertaken on the Importance of Nature to Canadians (Federal-Provincial-Territorial Task Force, 1996) uncovered that Canadians - along with U.S. tourists - spent a total of \$11.7 billion on nature-related activities in Canada. Of these expenditures, over \$800 million was spent in the pursuit of hunting. The sport fishing and hunting tourism industry not only injects large amounts of revenue into the economy but provides increased job opportunities, supporting numerous small and medium sized businesses.

Notwithstanding that a holistic assessment of sport fishing and game hunting in Canada would better delineate the international tourism opportunity, there is evidence provided in this secondary research that Canada could capitalized more on the opportunity presented by these outdoor activities, particularly in the United States.

What do we know on the importance of sport fishing and game hunting in Canada?

Although a holistic assessment on the game hunting and sport fishing industry in Canada has not been completed recently, various provincial studies described below confirm that this industry is significant and helps power its tourism and the Canadian economy. An older report “*The Economics of Fishing*” produced by the Canadian Sportfishing Industry Association in 2001 revealed that anglers collectively in all provinces and territories spent \$6.7 billion annually to support their outdoor passion, creating jobs in tourism, transportation, retail goods, boating, and more.

Revenue Generated by Canadian Anglers - 2000	
Province/Territory	Revenue (\$M)
Newfoundland/Labrador	\$207.1
PEI	\$4.6
Nova Scotia	\$93.2
New Brunswick	\$82.1
Québec	\$1,571.8
Ontario	\$2,333.4
Manitoba	\$298.7
Saskatchewan	\$255.0
Alberta	\$600.0
British Columbia	\$1,198.6
Yukon	\$17.1
Northwest Territories	\$32.4
Nunavut	\$2.3
Total	\$6,696.2

Source: Canadian Sportfishing Industry Association

Québec:

A study produced in 2004 for the “Ministère des Ressources naturelles de la Faune et des Parcs” from Québec, relates to the importance of the game hunting industry in Quebec. With over 400,000 enthusiastic annual hunters (based on license sold), this industry generated economic benefits of over \$300 million.

Ontario:

According to the Ontario Federation of Anglers and Hunters, hunting has become an important industry, part of Canada’s resource-based economy. In 2000, the net economic benefits associated with recreational hunting in Ontario represented over \$1.5 billion in economic activity. It employed approximately 20,000 people, with many jobs away from the city. Federal, provincial, and municipal governments collected an additional \$140 million directly as a result of hunters’ expenditures.

- Canadian hunters spent about \$1.2 billion a year on hunting trips, and paid \$70 million for hunting licenses.
- Hunting and fishing license sales represented approximately 70% of the total operating budget of the Ontario Ministry of natural Resources.

- Ontario's hunting industry generated more wealth than Ontario's television and film production industry (\$1.4 billion in 2000).

Alberta:

The 2009 report *Hunting in Alberta Performance, Value and Socioeconomic Impact* stated that a total of 99,001 adult hunters were identified to have held hunting licenses in Alberta in 2008. Of these, 90% were Alberta residents, 3% were from other parts of Canada and 7% from outside of Canada. Albertan hunters spent more than \$102.5 million in direct hunting expenditures in 2008, compared to the \$4.2 million spent by non-resident hunters from the rest of Canada and the \$7 million spent by non-resident hunters from outside Canada.

Table 3 - Economic Impacts of Direct and Capital Expenditures in Alberta
(2008 Dollars)

	Direct Expenditures				Capital
	Resident	Non-Resident	Non-Resident Alien	Total	
Initial Expenditure	\$102,540,299	\$4,192,832	\$6,691,604	\$113,424,735	\$183,003,274
Value Added					
Direct	\$39,096,509	\$1,484,027	\$2,341,447	\$42,921,983	\$57,074,717
Indirect & Induced	\$65,258,430	\$2,619,194	\$4,152,329	\$72,029,953	\$128,556,666
Total	\$104,354,939	\$4,103,221	\$6,493,776	\$114,951,936	\$185,631,383
Multiplier	1.02	0.98	0.97	1.01	1.01
Gross Output					
Direct	\$90,447,409	\$3,644,215	\$5,725,513	\$99,817,137	\$183,003,274
Indirect & Induced	\$123,344,494	\$5,086,788	\$8,035,416	\$136,466,698	\$239,798,387
Total	\$213,791,903	\$8,731,003	\$13,760,929	\$236,283,835	\$422,801,661
Multiplier	2.08	2.08	2.06	2.08	2.31
Wages & Salaries					
Direct	\$24,900,618	\$942,665	\$1,527,480	\$27,370,763	\$46,251,922
Indirect & Induced	\$36,479,392	\$1,460,492	\$2,349,673	\$40,289,557	\$69,010,015
Total	\$61,380,010	\$2,403,157	\$3,877,153	\$67,660,320	\$115,261,937
Employment					
Direct	395	19	31	445	918
Indirect & Induced	659	27	44	730	1,172
Total	1,054	46	75	1,175	2,090
Multiplier	2.67	2.42	2.43	2.64	2.28
Taxes					
Federal	\$25,270,271	\$987,334	\$1,574,877	\$27,832,482	\$46,504,177
Provincial	\$22,198,034	\$951,339	\$1,623,168	\$24,772,541	\$17,433,050
Local	\$2,304,110	\$91,826	\$149,823	\$2,545,759	\$3,974,972
Total	\$49,772,415	\$2,030,499	\$3,347,868	\$55,150,782	\$67,912,199
Imports					
From Other Provinces	\$10,729,738	\$433,542	\$696,294	\$11,859,574	\$26,378,128
From Other Countries	\$15,009,220	\$638,604	\$1,010,796	\$16,658,620	\$28,899,080
Total	\$25,738,958	\$1,072,146	\$1,707,090	\$28,518,194	\$55,277,208

Source: Econometric Research Limited, 2008

British Columbia:

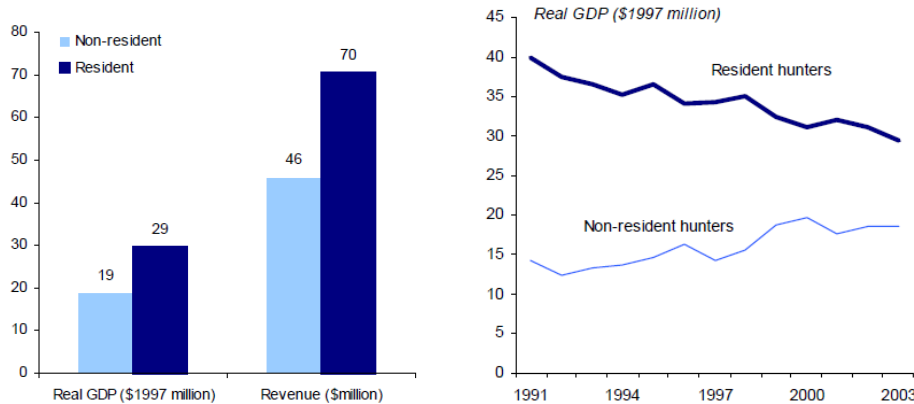
According to the report by BC Stats in 2005, titled *British Columbia's Hunting, Trapping & Wildlife Viewing Sector*, more than 5,000 non-residents come to BC to hunt each year. The report indicates that they purchase about 7% of basic hunting licenses sold in BC, and harvest about 9% of the large game caught in the province. The vast majority of non-resident hunters are from the US (86% in 2002), while virtually none are from other provinces. Germany is also a common source of non-resident hunters. The trend in non-resident hunting has

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been considerably different than for BC hunters. The non-resident harvest has increased by more than 20% since 1992.

In terms of industry revenues, hunters spent an estimated \$116 million in BC in 2003. Of this total, resident hunter spending was \$70 million, with another \$46 million of spending by non-residents. The market for these activities is, however, rather limited.

Hunters generated \$48 million of the province's GDP in 2003



Source: British Columbia's Hunting, Trapping & Wildlife Viewing Sector, BC Stats 2005

The report highlighted that resident hunters generated the lion's share of total GDP and revenues for BC. However non-resident hunters were gaining in prominence up until 2003. This prominence was attributable to non-residents spending more money participating in this sport than resident hunters.

Manitoba:

The Manitoba report *Economic Evaluation of Manitoba's Hunting and Fishing Industry* detailed that the hunting and fishing industry in Manitoba is comprised of approximately 258 lodges and outfitters and over 250,000 license holders pursuing hunting and fishing in the province (2010). The report also highlights that the resident market is especially healthy, with over 214,000 licenses sold in 2010. The report estimates that there are 179,405 hunters and anglers in Manitoba and on average each purchase 1.2 different licenses.

Of these license holders, 81% are Manitoba residents, 7% are non-resident Canadians (esp. from Saskatchewan, Alberta and Ontario), and 12% are from the US (esp. from Minnesota and Wisconsin). Ten percent hunt and fish, while 66% only fish and 24% hunt exclusively. According to this report non-resident Canadians were among the least likely to hunt.

Hunter and angler trip expenditures in 2010 were \$469.1 million. Manitoba residents were said to account for 88% of all expenditures, with US residents accounting for 8% and making up the majority of expenditures on

packages and a significant share on professional services. *Note: Note economic impact is not separated for hunting and fishing.*

The report also highlighted that Hunters and anglers in-Manitoba expenditures generated \$312.2 million in Manitoba GDP (0.58%) along with 7,499 jobs (equal to 1.2% of Manitoba employment and 6,180 full-time equivalent positions) in 2010. The share that went to lodges and outfitters generated \$25.8 million in GDP and 674 jobs (543 full-time equivalents). Government revenues (all levels together net of subsidies and taxes) were estimated at \$70.1 million.

Saskatchewan:

The report *Economic Evaluation of Hunting in Saskatchewan* stated that Hunting license sales were in a state of decline between 1995 and 2004 in Saskatchewan and throughout North America. The report does however highlight that at the same time as overall declines were reported there was a steady increase in out of province hunting visitation to Saskatchewan.

Table 1 – Saskatchewan License Sales										
License Type	1995	1996	1997	1998	1999	2000	2001	2002	2003	2004
Total SK Licenses	123,150	106,935	103,333	108,481	101,594	87,072	87,057	87,833	95,129	87,465
Total Canadian Licenses	3,252	3,242	3,586	3,982	4,239	4,489	3,651	4,120	4,491	4,296
Total Non-Resident Licenses	11,163	10,859	12,098	13,665	16,435	17,422	15,179	15,914	17,121	17,413
% Out of Province	10.5%	11.7%	13.2%	14.0%	16.9%	20.1%	17.8%	18.6%	18.5%	19.9%
Total License	137,565	121,036	119,017	126,128	122,268	108,983	105,887	107,867	116,741	109,174

Source: Economic Evaluation of Hunting in Saskatchewan, December of 2006, Derek Murray Consulting Associates

The report further stated that Saskatchewan’s hunting and fishing products are a significant part of Saskatchewan’s tourism economy. 15% of Canadian visits and 19% of American visits to the province involve a fishing activity while 2% of Canadian visits and 6% of American visits will involve a hunting activity.

Table 5 – Attractor Levels – Comparative Visitation Between Hunting and Fishing and Other Saskatchewan Attractions			
	Total Visitation	Local Visitation	Tourist Visitation
Gaming (SIGA and SGC)	4,000,000	2,716,000	1,284,000
Saskatchewan Fishing	1,100,000¹⁶	623,000	477,000¹⁷
Regina Exhibition Park	1,000,000	790,000	210,000
Prairieland Exhibition Park	1,000,000	700,000	300,000
Saskatchewan Hunting	535,000¹⁸	355,000	180,000¹⁹
Saskatchewan Roughriders	264,000	185,000	79,000
National Parks ²⁰	191,000	10,000	181,000
Mendel Art Gallery	178,000	142,400	35,600
McKenzie Art Gallery	88,000	n/a	n/a

Source: Economic Evaluation of Hunting in Saskatchewan December, 2006, Derek Murray Consulting Associates

Total expenditures generated by outfitted hunting and fishing in Saskatchewan were \$82,457,465 in 2008.

Expenditures and Species Outfitted – Non-Outfitted				
Hunter Type	Gross Expenditure	Marginal Expenditure	GDP Impact	FTE Employment
Outfitted				
Hunting	\$39,239,384	\$39,239,384	\$27,611,353	742.6
Fishing	\$43,218,080	\$43,218,080	\$30,411,020	818.0
Total Outfitted	\$82,457,464	\$82,457,464	\$58,022,373	1,560.6
Non-Outfitted				
Hunting	\$68,339,991	\$24,141,587	\$8,914,139	269.2
Fishing	\$156,662,588	\$63,947,739	\$23,256,150	698.6
Total Non-Outfitted	\$225,002,579	\$88,089,326	\$32,170,289	967.8
Totals	\$307,460,043	\$170,546,790	\$90,192,662	2,528.4

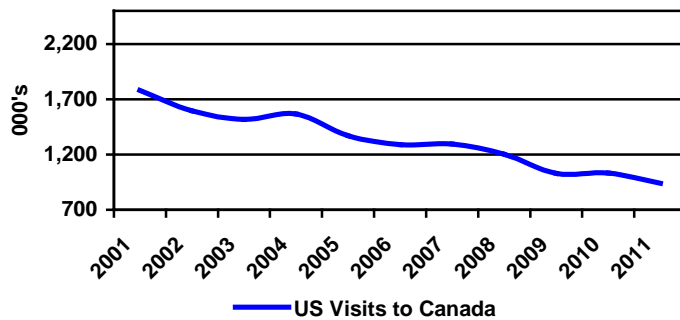
Source: Economic Evaluation of Hunting in Saskatchewan December, 2006, Derek Murray Consulting Associates

Where do Canada's Sport Fishing & Game Hunting Avid come from?

International Traveller Characteristics from Statistics Canada:

Data derived from Statistics Canada's International Travellers Characteristics provides annual participation rates, expenditures relating to travellers to Canada along with demographic characteristics. When isolating those travellers participating in fishing and hunting, the number of records reported for overseas markets are too small to report on. That said, data are available on US residents fishing and hunting while on a vacation trip to Canada. As illustrated in the table below, the level of Americans visiting Canada for one night or more since 2001 has seen a declining trend, dropping by half from 1.8 million in 2001 to 939 thousand in 2011. This is not surprising, as it follows a similar trend experienced by the drop in all US visitations to Canada.

One or more night Fishing and/or Hunting



Source: Statistics Canada, International Travel Survey

As illustrated in the tables below, the appeal of Canada as a travel destination for hunting and/or fishing by Americans has not shifted significantly, as the share of these enthusiasts have not shift drastically since 2001, following a similar pattern as the slide in US visitation to Canada. More importantly is that hunters and fishermen from the US are higher yield travellers, staying for a longer time in Canada than the average stay by Americans while visiting Canada.

US Travellers to Canada participating in hunting & fishing activities 2001 - 2010:

Year of entry	Total Entries - (000's)	# of Leisure Travellers (000's)	Share of Total Entries	Total Spending (millions)	Total Leisure Spending (millions)	Share of Total Spending	Person nights (000's)	Average Length of Stay (nights)
2001	1,753	13,650	13%	\$1,229	\$6,415	19%	12,030	6.9
2002	1,573	14,213	11%	\$1,187	\$6,834	17%	10,815	6.9
2003	1,484	12,524	12%	\$1,147	\$5,928	19%	9,694	6.5
2004	1,528	13,097	12%	\$1,268	\$6,585	19%	10,046	6.6
2005	1,347	12,427	11%	\$1,063	\$5,940	18%	9,152	6.8
2006	1,266	11,906	11%	\$920	\$5,729	16%	8,247	6.5
2007	1,230	11,423	11%	\$924	\$5,517	17%	8,323	6.8
2008	1,052	10,571	10%	\$774	\$5,019	15%	7,168	6.8
2009	1,006	9,923	10%	\$817	\$4,709	17%	6,827	6.8
2010	1,014	10,008	10%	\$806	\$4,836	17%	6,776	6.7

Source: Statistics Canada, International Travel Survey

Yield of US Travellers to Canada participating in hunting & fishing activities 2001-2010:

Year of entry	Yield per Trip of US Travellers	Yield per Trip of US Leisure Travellers	Yield per Trip Ratio	Yield per Day – Hunting/ Fishing	Yield per Day - Leisure	Trip Yield Ratio
2001	\$702	\$470	1.5	\$102	\$114	0.9
2002	\$755	\$481	1.6	\$110	\$117	0.9
2003	\$773	\$473	1.6	\$118	\$116	1.0
2004	\$829	\$503	1.6	\$126	\$121	1.0
2005	\$789	\$478	1.7	\$116	\$116	1.0
2006	\$726	\$481	1.5	\$112	\$117	1.0
2007	\$751	\$483	1.6	\$111	\$115	1.0
2008	\$736	\$475	1.6	\$108	\$111	1.0
2009	\$812	\$475	1.7	\$120	\$113	1.1
2010	\$795	\$483	1.6	\$119	\$116	1.0

Source: Statistics Canada, International Travel Survey

TAMS US Activity Profile: Hunting while on a trip

The TAMS survey conducted in 2006, examined the recreational activities and travel habits of Americans. The following provides details on Americans who game hunted and sport fished while on a trip to Canada:

- Over the period of 2004 to 2005, 9.2 million adult Americans went hunting while on an out-of-town trip of one or more nights. 6.4 million reported hunting for large animals, 4.1 million for small game and 3.4 million hunted for birds. Of those who hunted, 73% reported that hunting was the main reason for taking at least one trip in the past two years. An additional 32.1 million reported sport fishing for either fresh-water, salt-water, Ice or Trophy fishing. Of those who went fishing, 41% reported that fishing was the main reason for taking at least one trip in the past two years.
- Both US anglers and hunters were more likely than the average US pleasure traveler to have taken a trip to Canada in the past two years (17.9% and 19.0% versus 14.6%) and for that, especially a trip to Ontario.
- US Anglers and hunters while on a trip to Canada normally participate in many other outdoor activities, especially those with a nature theme: wildlife viewing, hiking, climbing and paddling.

Where does the International Tourism Opportunity Lie for Canada?

Hunting/Fishing Market Potential for Canada – Global Tourism Watch (GTW)

Based on the 2008 Global Tourism Watch, there is an excellent base of outdoor enthusiasts to tap in globally. The following tables provides an estimate of the size of the market potential in selected CTC target markets for hunting & fishing based on overall interest levels. The table also shows the size of the market potential (32.2 million) for Canada (based on the proportion of the hunting & fishing segment that is very or somewhat interested in visiting Canada). While the lion share in market potential (18.4 million) lies with the US, overseas markets collectively represent an appreciable market potential (13.8 million) to consider.

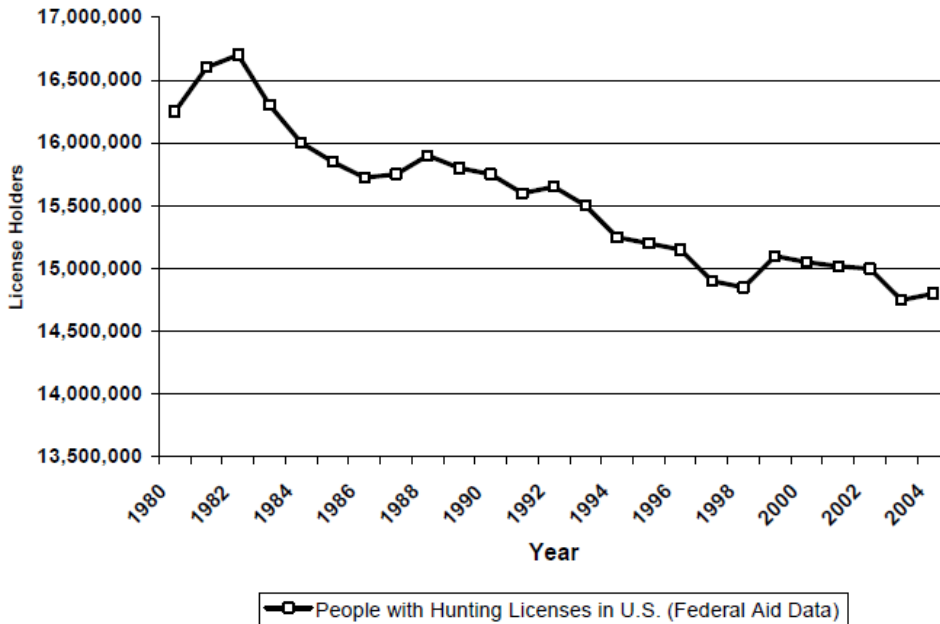
	Estimated Total Market Size (M)	% of hunting & fishing segment interested in Canada in next 2 years	Estimated Potential Market Size (M)
US	23.3	79%	18.4
Mexico	1.1	83%	0.8
UK	2.2	82%	1.8
France	2.0	83%	1.6
Germany	2.1	82%	1.7
Australia	1.5	75%	1.1
Japan	2.3	86%	2.0
S Korea	3.4	79%	2.7
China	2.8	76%	2.1
Total	40.7	79%	32.2

Source: 2008 Global Tourism Watch; n=3,100 for US and 1,500 for other markets

United States

As suggested by the 2008 GTW, the US represents the best opportunity to capitalize on. The US Fish and Wildlife Service sponsors a *National Survey of Fishing, Hunting, and Wildlife-Associated Recreation* (U.S. Department of the Interior, Fish and Wildlife Service, and U.S. Department of Commerce, U.S., 2006) every five years with the last survey conducted in 2006. While this survey focusses on domestic US game hunting, it provides a picture of the game hunting market overall and offers the perspective that 15% of American game hunters left their state to hunt in 2006. The report highlights that 12.5 million people 16 years old and older enjoyed game hunting a variety of animals within the United States. Those identified hunted 220 million days and took 185 million trips with hunting expenditures totaling \$22.9 billion. Of the total game hunters, an estimated 10.7 million hunters pursued big game, such as deer and elk, with 4.8 million hunters of small game including squirrels and rabbits. The report highlights that there was a decline in game hunters from 1996 through 2006, although big game hunting remained relatively stable, compared to small game and migratory bird hunting which saw larger declines.

Figure 2: American Hunting License Holders¹⁰



Source: United States Fish and Wildlife Service Data.

Based on a report produced by the American Sportfishing Association “*Sportfishing in America, An Economic Engine & Conservation Powerhouse*”, to Americans, sport fishing is seen as an enjoyable escape from life’s daily pressure and become a major gateway for millions of Americans. In fact, more Americans (40 million) fish than play golf (24.4 million) and tennis (10.4 million) combined. The spending of America’s 40 million anglers had in 2006 an overall economic impact of \$125 billion and supported over one million jobs nationwide.

Ultimately, Americans lives directly depend on outdoor recreation, and game hunting and sport fishing are a priority of the daily lives of many.

What are the Opportunities/Challenges Moving Forward?

Opportunities:

- Excellent supportive industry with considerable capacity to grow;
- Majority of industry have a website;
- Broadly based economic benefits from central urban areas to remote areas;
- Economic benefits during off-peak seasons;
- Renewed opportunities in the US – Americans are avid hunters;
- Proximity of the United States;
- Limited recent assessment of the hunting industry – opportunity to refresh the intelligence on the potential of the sport fishing and game hunting industry to better assist in the development and implementation of a potential marketing strategy to attract international travelers with a motivation for these activities;

Challenges:

- Lack of a strong marketing voice on the international front;
- Limited labor supply;
- Intensified competition, primarily from the US;
- Gaps in knowledge;
- Long term decline in US Hunting licenses (1980 – 2004);
- Lack of resources for CTC to engage in this space in a meaningful manner;

Appendix I - Provincial Regulatory Information

	Prerequisites/Requirements
Alberta	Non-resident (Canadian) and Non-resident Alien hunters of big game, wolf and coyote must be accompanied by a licensed guide or a Hunter Host.
British Columbia	Non-residents of BC hunting big game must be accompanied by either a licensed BC guide or a resident who holds a "Permit to Accompany".
Manitoba	To hunt big game (deer, moose, black bear, and caribou) in Manitoba, all foreign resident hunters must book their hunt through a registered lodge or outfitter, authorized to outfit foreign resident hunters. It is also mandatory for all foreign resident hunters to be accompanied by a licensed Manitoba guide, with no more than three hunters per guide. Non-resident hunters must only use the services of the outfitter specified on their hunting license.
Newfoundland and Labrador	Non-resident big game hunters are required to be accompanied by licensed guides. Guides are supplied by licensed outfitters. Small game or waterfowl hunters do not require guides. Non-resident small game licenses are available through regular vendor outlets including convenience and sporting goods stores, and at Government Services Centres. Federal Migratory Game Bird Permits are available through Canada Post Offices.
Northwest Territories	Non-residents and non-resident aliens require an outfitter to hunt big game (but not small game). Information of outfitters in the NWT may be obtained by contacting "Northwest Territories Tourism".
Nova Scotia	Licensed Guide or a resident (over 19) who has obtained a Special Permit to Guide.
Nunavut	A person who is a non-resident or a non-resident foreigner can only hunt big game if they use the services of a licensed outfitter and are accompanied by a licensed guide.
Ontario	Any hunter who is not a resident of Ontario who wants to hunt in the province needs an Outdoors Card. The Non-Resident Outdoors Card is similar to the Outdoors Card Ontario residents have been using since 1993. It is required in order to purchase Ontario hunting and fishing license tags.
Prince Edward Island	No person who is a non-resident shall hunt unless the person is accompanied by a licensed resident hunter or a registered guide.

Québec	Non-residents are not required to hold a hunter’s certificate. Non-residents are limited to the purchase of certain hunting license and restricted to frequenting certain hunting zones or to visiting certain areas, depending on the game hunted.
Saskatchewan	Non-residents of Canada must use the services of a licensed outfitter while hunting black bear, white-tailed deer and moose.
Yukon	To hunt big game, non-resident aliens must be guided by a registered Yukon outfitter. Non-resident Canadians must be guided by a registered Yukon outfitter or guided by a Yukon resident holding a Special Guide License.

Appendix II:

A. Regulatory Bodies:

	Jurisdiction	License Fees (2012 season)	Prerequisites / Required to purchase license	Notes (Non-residents)
British Columbia	Ministry of Forests, Lands and Natural Resource Operations, Fish, Wildlife and Habitat Management Branch	Resident - all game \$32.00	Conservation and Outdoor Recreation Education (CORE) – Not Compulsory	Non-residents of BC hunting big game must be accompanied by either a licensed BC guide or a resident who holds a “Permit to Accompany”.
		Resident who is 65 years of age or over - all game \$7.00		
Alberta	Ministry of Alberta Sustainable Resource Development, Fish and Wildlife Division	Resident of Canada (not BC) - all game \$75.00	Wildlife Identification Number: \$8 Non-resident Wildlife Certificate: \$28.22 Non-Resident Alien Wildlife Certificate: \$68.22	Total License Sold in 2011: 96,292 Non-resident (Canadian)/Non-resident alien hunters of big game, wolf and coyote must be accompanied by a licensed guide or a Hunter Host. Non-resident/Non-resident alien hunters are exempt from the first-time hunter eligibility requirement if they are accompanied by a Hunter Host or a Designated Guide.
		Non-resident - all game (<i>Resident of another country</i>) \$180.00		
		Canada Migratory Game Bird Hunting Permit \$17.00 (Federal)		
		Resident – Black Bear \$15.65		
		Resident – White-tailed Deer \$36.95		
		Resident – Moose \$36.95		
		Resident - Trophy Sheet \$51.31		
		Non-resident – Black Bear \$63.61		
		Non-resident – White-tailed Deer \$122.33		
		Non-resident – Moose \$135.31		
Non-resident - Trophy Sheet \$317.82				
Non-resident Alien– Black Bear \$79.62				
Non-resident Alien – White-tailed Deer \$188.57				
Non-resident Alien – Moose \$254.97				
Non-resident Alien - Trophy Sheet \$317.82				
Hunter Host License - \$27				

Saskatchewan	Ministry of Environment	Resident – Black Bear \$16.68 Resident – White-tailed Deer \$32.38 Resident – Moose \$32.38 Non-resident (Canadian) – Black Bear \$53.97 Non-resident (Canadian) – White-tailed Deer \$137.38 Non-resident (Canadian) – Moose \$53.97 (Guided) Non-resident Alien– Black Bear \$161.92 (Guided) Non-resident Alien – White-tailed Deer \$274.76 (Guided) Non-resident Alien – Moose \$323.83 (Guided)	Wildlife Habitat Certificate: \$10.79	Non-residents of Canada must use the services of a licensed outfitter while hunting black bear, white-tailed deer and moose.
Manitoba	Ministry of Conservation and Water Stewardship	Resident – Black Bear \$31 Resident – White-tailed Deer \$36 Resident – Moose \$52 Non-resident (Canadian) – Black Bear \$103 Non-resident (Canadian) – White-tailed Deer \$155 Non-resident (Canadian) – Moose \$299 Non-resident Alien– Black Bear \$217 Non-resident Alien – White-tailed Deer \$217 Non-resident Alien – Moose \$360	Hunter Education Card or Certificate	Must be a graduate of the Manitoba Hunter Education course or a similar hunter education course from another jurisdiction.
Ontario	Ministry of Natural Resources	Resident – Moose \$52.31 Resident – Deer \$45.04 Resident – Black Bear \$45.04 Non-resident – Moose \$449.58 Non-resident – Deer \$224.66 Non-resident – Black Bear \$224.66	Non-Resident Outdoor Card : \$9.68 Ontario Hunter Education Program – Not Compulsory	Non-resident s must have a Non-resident Black Bear Hunting License Validation Certificate.

Québec	Ministry for Natural Resources and Wildlife (Ministère des Ressources naturelles et de la Faune)	Resident – Caribou \$64.70 Resident – White-tailed Deer \$52.24 Resident – Moose \$58.35 Canadian non-residents - Caribou \$144.26 Non-resident – Caribou \$354.26 Non-resident – White-tailed Deer \$280.02 Non-resident – Moose \$363.82	Hunter's Certificate	Non-residents are not required to hold a hunter's certificate. Non-residents are limited to the purchase of certain hunting license and restricted to frequenting certain hunting zones or to visiting certain areas, depending on the game hunted.
New Brunswick	Ministry of Natural Resources	Resident – Black Bear \$47.46 Resident – Deer \$38.42 Resident – Moose \$81.36 Non-resident (Cnd&Alien) – Black Bear \$184.19 (Guided) Non-resident (Cnd&Alien) – Deer \$206.79 Non-resident (Cnd&Alien) – Moose \$619.24	Firearm Safety and Hunter Education course.	Firearm Safety/Hunter Education and Bow Hunter Education certificates from other provinces, territories and the United States are valid in New Brunswick. All non-resident hunters must hunt with a licensed guide.
Yukon	Environment Yukon	License Fee: Resident - \$10 Non-resident Canadian \$75 Non-resident Alien \$150 Small Game Only License Fees Resident - \$5 Non-resident \$20 Big Game Seal Fees – A big game seal for each animal must be obtained before hunting. All non-resident must pay Harvest Fees on any big game animals killed. Non-resident Harvest Fees: Moose \$150, Grizzly Bear \$500 (male) \$750 (female), Black Bear \$7, Bison \$500	Yukon Hunter Education and Ethics Development (HEED) Certificate – requirement only for Yukon residents	To hunt big game, non-resident aliens must be guided by a registered Yukon outfitter. Non-resident Canadians must be guided by a registered Yukon outfitter or guided by a Yukon resident holding a Special Guide License.

<p>Northwest Territories</p>	<p>Environment and Natural Resources</p>	<p>Tag Fees: For all classes of hunters, fees must be paid before you go hunting.</p> <p>Trophy Fees: Must be paid by non-resident and non-resident aliens before a harvested animal.</p> <p>Resident – Moose Tag Fee only \$20</p> <p>Resident – Black Bear Tag Fee only \$20</p> <p>Resident – Polar Bear Tag Fee Only \$20</p> <p>Resident – Grizzly Bear Tag Fee Only \$20</p> <p>Non-resident (Cnd) – Moose Tag \$40 + Trophy \$400</p> <p>Non-resident (Cnd) – Black Bear Tag \$40 + Trophy \$200</p> <p>Non-resident (Cnd) – Polar Bear Tag \$40 + Trophy \$1,500</p> <p>Non-resident (Cnd)– Grizzly Bear Tag \$40 + Trophy \$2,000</p> <p>Non-resident Alien – Moose Tag \$100 + Trophy \$400</p> <p>Non-resident Alien– Black Bear Tag \$100 + Trophy \$200</p> <p>Non-resident Alien – Polar Bear Tag \$100 +Trophy \$1,500</p> <p>Non-resident Alien–Grizzly Bear Tag \$100 +Trophy \$2,000</p>	<p>Non-residents and non-resident aliens require an outfitter to hunt big game (but not small game). Information of outfitters in the NWT may be obtained by contacting “Northwest Territories Tourism”.</p>
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Appendix III

US Outbound Travellers citing Hunting as appealing for an International trip of one night or longer with one night in paid accommodations

USA	Characteristic	Category	% No Appeal	Category Distribution	% Appeal	Category Distribution
	<i>Total Market</i>	<i>Hunting</i>	<i>81%</i>	<i>N/A</i>	<i>19%</i>	<i>N/A</i>
	Gender	Male	72%	42%	28%	68%
		Female	88%	58%	12%	32%
	Age	18 - 34 yrs	75%	28%	25%	40%
		35 - 54 yrs	83%	39%	17%	34%
		55+ yrs	84%	33%	16%	26%
	Marital Status	Married/Common Law	81%	66%	19%	64%
		Single	80%	34%	20%	36%
	Education	HS or Less	79%	22%	21%	25%
		University/College	81%	61%	19%	60%
		Post-Graduate	83%	17%	17%	15%
	Household Income (CAD)	<\$80,000"	81%	67%	19%	65%
		\$80K - \$99,999	80%	14%	20%	14%
		\$100K - \$199,999	83%	18%	17%	16%
		\$200K+	62%	2%	38%	5%
	Employment Status	Full-Time	78%	47%	22%	54%
		Part-Time	87%	13%	13%	9%
		Homemaker	88%	9%	12%	5%
		Retired	83%	19%	17%	17%
		Student	72%	5%	28%	9%
		Unemployed	82%	7%	18%	6%
	Children in Household	None < 18	83%	72%	17%	63%
		Any < 18	76%	28%	24%	37%
	Life stage	Young (no kids)	77%	20%	23%	25%
		Families	76%	28%	24%	36%
		Middle Age (no kids at home)	85%	27%	15%	19%
		Mature (60+)	84%	26%	16%	20%
	Neighbourhood Type	City	79%	18%	21%	20%
		Suburban	83%	51%	17%	43%
		Town/Rural	78%	31%	22%	37%
	Own Valid Passport	No	80%	38%	20%	41%
		Yes	81%	62%	19%	59%

Source: Canadian Tourism Commission's US Explorer Quotient 2010-2011 segmentation study N=3,000

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Appendix IV:

Profile on US Outbound Travellers showing Hunting as a driver for an International trip of one night or longer with one night in paid accommodations.

USA	Characteristic	Category	% Not Driver	Category Distribution	% Driver	Category Distribution
	<i>Total Market</i>	<i>Hunting</i>	<i>90.4%</i>	<i>N/A</i>	<i>9.6%</i>	<i>N/A</i>
	Gender	Male	85%	45%	15%	73%
		Female	95%	55%	5%	27%
	Age in 3 Categories	18 - 34 yrs	87%	29%	13%	43%
		35 - 54 yrs	91%	38%	9%	37%
		55+ yrs	94%	33%	6%	21%
	Marital Status	Married/Common Law	91%	66%	9%	65%
		Single	90%	34%	10%	35%
	Education	HS or Less	89%	22%	11%	25%
		University/College	90%	60%	10%	63%
		Post-Graduate	93%	17%	7%	12%
	Household Income (CAD)	<\$80,000"	90%	66%	10%	72%
		\$80K - \$99,999	92%	14%	8%	12%
		\$100K - \$199,999	93%	18%	7%	13%
		\$200K+	86%	2%	14%	4%
	Employment Status	Full-Time	89%	48%	11%	54%
		Part-Time	91%	12%	9%	11%
		Homemaker	95%	9%	5%	5%
		Retired	92%	19%	8%	15%
		Student	86%	6%	14%	9%
		Unemployed	91%	7%	9%	6%
	Children in Household	None < 18	91%	70%	9%	65%
		Any < 18	89%	30%	11%	35%
	Life stage	Young (no kids)	86%	20%	14%	29%
		Families	89%	28%	11%	34%
		Middle Age (no kids at home)	93%	26%	7%	19%
		Mature (60+)	93%	26%	7%	17%
	Neighbourhood Type	City	91%	18%	9%	17%
		Suburban	91%	50%	9%	48%
		Town/Rural	89%	32%	11%	36%
	Own Valid Passport	No	90%	38%	10%	39%
		Yes	91%	62%	9%	61%

Source: Canadian Tourism Commission's US Explorer Quotient 2010-2011 segmentation study N=3,000

Appendix: V

Hunting Stakeholders:

Members of the National Hunting and Angling Advisory Panel:

- Canadian Shooting Sports Association
- Fur Institute of Canada
- Newfoundland and Labrador Wildlife Federation
- Nova Scotia Federation of Anglers and Hunters
- New Brunswick Wildlife Federation
- La Federation Québécoise des Chasseurs et Pecheurs
- Ontario Federation of Anglers and Hunters
- Manitoba Wildlife Federation
- Saskatchewan Wildlife Federation
- Alberta Fish and Game Association
- British Columbia Wildlife Federation
- Safari Club International - Canada
- Canadian Sportfishing Industry Association
- Ducks Unlimited Canada
- Wildlife Habitat Canada
- Delta Waterfowl
- Trout Unlimited
- Pacific Salmon Foundation
- Atlantic Salmon Federation

Outfitters:

- Canada's Hunting Network: www.Huntingoutfitters.ca
- Canadian Federation of Outfitter Associations: <http://canada-outfitters.com/>
- Alberta Professional Outfitters Society: <http://www.apos.ab.ca/>
- Guides and Outfitters Association of British Columbia: <http://www.goabc.org/>
- New Brunswick Outfitters Association: <http://www.nboa.nb.ca/>
- Newfoundland and Labrador Outfitters: <http://www.nloa.ca/>
- Manitoba Lodge and Outfitters Association: <http://www.mloa.com/>
- Ontario Federation of Anglers and Hunters (OFAH): <http://www.ofah.org/>
- Northern Ontario Tourism Outfitters (NOTO): <http://www.noto.net/>
- Federation of Quebec Outfitters (FPQ): <http://www.pourvoiries.com/>
- Association des sauvaginaires de la grande région de Québec: <http://www.asgrq.com/>
- Saskatchewan Outfitters Association (SOA): <http://www.soa.ca/>
- Yukon Outfitters Association (YOA): <http://www.yukonoutfitters.net/>
- Yukon Fish and Game Association: <http://www.yukonfga.ca/>

Conservation organizations:

- Canadian Wildlife Federation <http://www.cwf-fcf.org/en/about-cwf>
- World Wildlife Federation: <http://www.wwf.ca/>
- PacificWild.org: <http://www.pacificwild.org/site/our-work/stop-the-trophy-hunt.html>
- Ducks Unlimited Canada: <http://www.ducks.ca/conservation/index.html>
- Nature Canada: http://www.naturecanada.ca/about_history.asp

The Canadian Hunting Landscape: With a Special Focus on Inbound Visitors to Canada

- Wildlife Conservation Society: <http://www.wcscanada.org/>

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AB: Environment and Sustainable Development, Government of Alberta

<http://albertaregulations.ca/pdfs/hunting-regs/Licensing.pdf>

BC: 2012 – 2014 HUNTING & TRAPPING, Government of British Columbia,

http://www.env.gov.bc.ca/fw/wildlife/hunting/regulations/1214/docs/hunting_trapping_2012_2014.pdf

MB: Province of Manitoba

<http://www.gov.mb.ca//conservation/wildlife/hunting/index.html>

NB: Hunt & Trap, Natural Resources Government of New Brunswick,

<http://www2.gnb.ca/content/dam/gnb/Departments/nr-rn/pdf/en/Wildlife/HuntTrap.pdf>Nunavut:

NFLD and LAB: Government of Newfoundland and Labrador,

<http://www.env.gov.nl.ca/env/wildlife/hunting/nonres.html>

NT: Department of Environment, Summary of Hunting Regulations 2012/2013,

<http://env.gov.nu.ca/sites/default/files/2012nuhuntingguide.pdf>

NS: Department of Natural Resources, Government of Nova Scotia

<http://www.gov.ns.ca/natr/hunt/nonresidents.asp>

NWT: Environment and Natural Resources, Government of the Northwest Territories

http://www.enr.gov.nt.ca/_live/pages/wpPages/Do_You_Need_an_Outfitter.aspx

ON: Hunting Regulations 2012 • 2013, Ontario Government, Ministry of Natural Resources

<http://www.mnr.gov.on.ca/stdprodconsume/groups/lr/@mnr/@fw/documents/document/239844.pdf>

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PE: Legislative Counsel Office, Prince Edward Island

<http://www.gov.pe.ca/law/regulations/pdf/W&04-1-07.pdf>

QB: Ressources naturelles et Faune, Gouvernement du Québec

<http://www.mrnf.gouv.qc.ca/english/publications/online/wildlife/hunting-regulations/special-rules/non-residents.asp>

SK: 2012 Saskatchewan Hunters' and Trappers' Guide, Saskatchewan Ministry of Environment

<http://www.environment.gov.sk.ca/Default.aspx?DN=2a5dfe9f-6442-4667-ad59-253883e8b8e2>