Increasing Sales For B.C. Freshwater Fishing And Tackle Stores Through The Development Of Complementary Goods And Services

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ABSTRACT

The sport fishing market in British Columbia is declining and unlikely to grow in the short-term. In addition to the difficulty of operating in a declining market, retail fishing and tackle stores have been challenged with increased competition, changing consumer expectations and new retail technology.

In order to grow their operations, these stores will need to develop new ways to increase sales and improve operational effectiveness. Increasing sales is possible through new products and services that are complementary to the existing product mix. These include fishing-related products such as rental equipment, packaged vacations or events, or products that cater to other activities engaged in by anglers, such as camping, hiking and bird-watching equipment.

There are also opportunities for fishing and tackle stores to undertake service and merchandising improvements to improve their sales and margins. Options to improve profitability through economies of scale and scope also exist.

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INTRODUCTION

British Columbia is home to 217,000 lakes and 430,000 rivers and streams containing 80 species of fish[1]. Respondents to the 2000 Survey of Sportfishing in British Columbia identified the fishing quality as world-class, with 70% of anglers rating their 2000 B.C. fishing experience as good to excellent. The results of the survey (Figure 26 - Rating the BC Fishing Experience) would seem to demonstrate that the quality of the resource is not an issue in the decline of the Sport Fishing industry. However, the Survey of Sportfishing in British Columbia uses fishing licences as the source of survey respondents. Therefore it does not include those who may have fished in the past and quit, at least in part as a result of poor fishing results.

A closer look reveals that the quality of the resource is declining - as measured by angler catch-per-unit-effort or CPU. The areas of decline tend to be adjacent to urban areas and the Canada-U.S. border, and include the South-Central British Columbia trout population.[2] This longer-term decline in the resource has a negative effect on angler motivation and participation.

Angler participation is also declining as a result of: angler time constraints; decreasing opportunities for fishing as waterways are developed and are no longer suitable for sport-fishing; an increase in the number of recreational alternatives; and a shift in population from rural to urban centers.

Declining markets for sport fishing in British Columbia are resulting in reduced revenues and profits for retail freshwater fishing and tackle stores. This paper reviews the environment in which this sector operates, and provides recommendations for increasing store revenues through the development of additional products and services. The report includes:

- A discussion of general demographic trends affecting the sportfishing sector.
- An analysis of the freshwater sport fishing sector in British Columbia with discussion on the reasons for the decline of the industry.
- A review of global consumer and retail trends affecting the industry.
- Demographic and behavioural profiles of anglers.
- An analysis of angler activities and related product/service opportunities.

The report includes recommendations for:

- Products and services that can be added to the fishing package to increase store revenues.
- Re-positioning stores to match emerging trends and consumer expectations based on the addition of these products and services.

This work is important to the sport fishing sector because:

- It provides retailers with information and ideas in support of increased profitability.
- It will lead to improved product and service offerings, thereby enhancing value to customers and ultimately increasing the overall customer base.

SECONDARY RESEARCH – CONSUMER PROFILE

General Demographic Trends

Aging Population

The aging of the baby-boomers is the most significant demographic force shaping the marketplace with nearly 1/3 of the population between the ages of 39 and 58 in 2005. The median age increased from 29.6 in 1981 to 37.6 in 2001[3]. Canadian adults now have more parents than children for the first time in history.

The biggest concerns of the elderly are health preservation, wealth preservation and safety/security. The aging population is also leading growth in passive recreation, recreation fitness and gardening[4].

Geographic Distribution

There has been a long-term population migration trend away from rural communities. The majority of Canadians (64%) now live in the Country's 27 large Census Metropolitan Areas[5].

As the population becomes more "urbanized" there are fewer individuals being exposed to the sport of fishing. In addition, it is challenging for urban dwellers to obtain the experience necessary to have success with the sport.

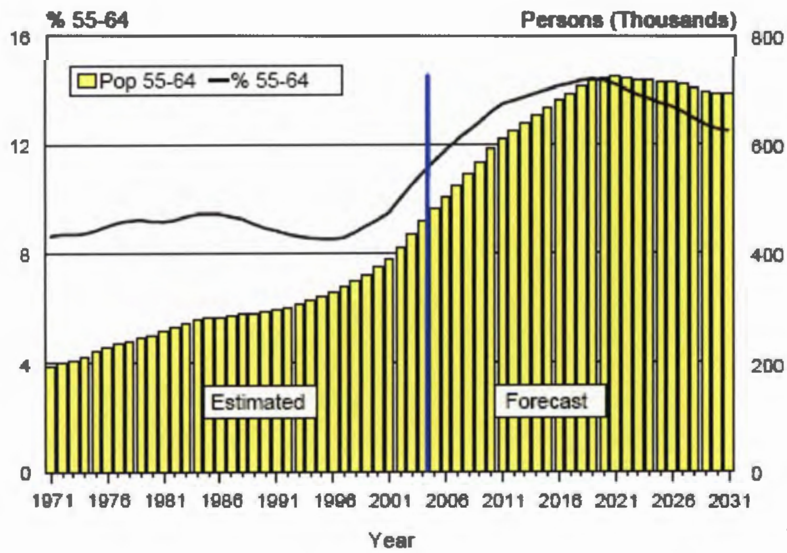
Angler Demographics

Age and Sex

The average age of B.C. resident anglers increased from 40.8 years in 1980 to 46.9 years in 2000. Canadian anglers from other provinces increased in average age from 38.3 years to 45.4 years over the same period.

Participation rates for fishing have traditionally been highest in the 55-64 year age group[6]. The B.C. population cohort of 55-64 is forecasted to grow significantly over the next 17 years levelling out at approximately 700,000 individuals. This increase matches well with the primary cohort for fishing.

Figure 1 - BC Population 55-64



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Location

In 2000, resident anglers made up 89% of the fishing days in British Columbia. 45% of non-resident anglers were Canadians visiting from other Provinces, primarily Alberta. 53% were Americans, primarily from Washington with the remaining 2% from other parts of the world, primarily the United Kingdom and Europe[8].

Participation and Spending

Angler Participation

Angler participation has been declining across North America. There were almost 17% fewer anglers in B.C. in 2000 than in 1995. The greatest decreases were from B.C. Residents and other Canadian anglers at 20% and 13% less anglers respectively, with non-Canadian anglers showing a modest increase of 3% (Figure 27 - Number of Active Anglers in BC).

The primary reasons for this decline are: angler time constraints; decreasing opportunities for fishing as waterways are developed and are no longer suitable for sport-fishing; declining fishing quality; an increase in the number of recreational alternatives; and a shift in population from rural to urban centers. For those anglers who do fish, the average number of days fished remained relatively consistent for the 15-year period from 1985-2000 (Figure 28 - Average Days Fished by Anglers in BC 1985-2000).

Reasons for the Decline of Angling

Eighty-two percent of B.C. anglers surveyed in 2000 indicated that they did not spend as much time fishing as they would have liked. The primary reason given was not enough time. Other reasons included poor catch rate, fishing spots too crowded, restrictive regulations, and fish too small (Figure 30 - Angler's Reasons for not Fishing More).

Fifty-five percent of U.S. anglers identified a lack of time as the reason they did not fish as much as they would have liked. Work obligations was the main reason cited (69%), followed by family obligations (22%), education/school commitments (13%) and other sports and hobbies (9%). The top 5 issues influencing inactive anglers not to fish more were cited as: amount of free time, lost interest, family obligations, work obligations and not having anyone to go with.[9]

Potential opportunities for freshwater fishing/tackle stores include identifying and developing ways to save time for anglers, and positioning stores to support angling as a family-oriented sport.

Spending on Sport Fishing

Despite dropping participation, total direct expenditures for angling were just 3% lower in 2000 than in 1995. Of particular interest were the increases in package deals (62% increase), fishing services (44%) and lodging (21% increase). These increases are consistent with trends in other tourism-related sectors where trip packaging, consumer convenience and higher levels of service are growing in importance. Total expenditures decreased for fishing supplies (24%), transportation (14%) and food (10%)[10]. Trip packaging, guiding services, and lodging represent potential service enhancements for the retail sector.

From 1995 to 2000, B.C. resident expenditures on Sport Fishing declined 47%. Other Canadian expenditures increased by 102% and non-Canadian expenditures increased 107%. Spending on fishing equipment declined 39%, boating equipment 38%, special vehicles almost 40%, and, other expenditures, about 45%

(Figure 29 - Average Direct Expenses per Angler in BC 1985-2000). The 39% decline in fishing equipment expenditures is particularly relevant to fishing/tackle stores, and clear motivation for developing additional complementary products and services.

Seasonality

The majority of fishing activity happens between the months of June to September. Fishing and tackle stores have an opportunity to look for services and/or products to increase their sales in their "shoulder" months.

Motivation for Fishing

Angler Motivation

An increasing number of anglers are fishing for relaxation, familial and naturalistic values. This is consistent with both the aging demographic and with the trend toward decreasing catch-per-unit-effort. An analysis of 1999 data compared to 1980 data demonstrates a clear trend of increasing motivation for these reasons (Figure 34 - Reasons Anglers Fish - U.S.) with the numbers of participants fishing for sport, fishing for large fish and fishing for food decreasing.[11]

Fishing for relaxation, nature and companionship are the key fishing motivations for B.C. anglers. (Figure 33 - Angler's Motivation for Fishing). U.S. studies portray similar results with 35% of anglers fishing for relaxation, 33% fishing to be with family and friends and 13% fishing to be close to nature.

It is also apparent that there are two distinct markets within the fishing population. Those who fish to relax and to be with friends and family, and those who fish for sport and utilitarian values. The market is clearly shifting toward the former.

Encouraging More Angling

When asked what would encourage them to go fishing, U.S. anglers cited: asked by a child, invitation from a friend, offered as part of a vacation, one-stop equipment/licence purchase, fishing spot with all gear provided, borrowing fishing gear free, amateur fishing tournaments with many prizes and fishing clinics (Figure 35 – Situations that Would Encourage an Angler to go Fishing).

Eighty one percent of anglers and 45% of non-anglers said they would go fishing more if it were offered as part of a vacation. For avid anglers, fishing is the reason to take the trip, where for less avid anglers fishing needs to be marketed as part of the vacation – not the reason for it.[12]

Complementary Activities

Current Activities

Anglers are consumers of other outdoor recreation products and services. These complementary activities represent opportunities for fishing/tackle stores to expand their product/service offering.

In British Columbia, camping was rated as the most popular complementary activity by 72% of anglers, with hiking indicated by 52%.

Figure 2 - Other Activities Engaged in by BC Anglers (2000)

Activity	B.C. Resident	Other Canadian	Non-Canadian	Total	%
Camping	172,015	20,475	22,106	214,596	71.8
Boating	85,540	9,648	11,108	106,296	35.5
Canoeing	56,680	6,579	7,483	70,742	23.7
Hunting	63,052	5,694	6,998	75,744	25.3
Nature study	39,909	6,624	8,606	55,139	18.4
Biking	47,965	4,855	3,957	56,777	19.0
Off-roading	35,515	4,998	1,792	42,305	14.1
Hiking	119,136	15,984	19,517	154,637	51.7
Horseback	16,783	3,173	3,395	23,351	7.8
Swimming	105,277	10,900	10,225	126,402	42.3
Snowshoeing	12,623	1,749	1,224	15,596	5.2
Skiing	60,258	6,165	7,024	73,447	24.6
Other activities	28,996	3,197	4,921	37,114	12.4
No other activities	12,184	1,669	5,556	19,409	6.5
Number responding	232,609	28,211	38,263	299,083	100

[13]

Research on U.S. outdoor recreation trends identified the following groups as being very interested in freshwater fishing: hunters, target shooters, boaters, wildlife/bird watchers, campers, wilderness campers, national/state park visitors, hikers, water skiers, waterfowl hunters, small game hunters and mountain bikers.[14] Not surprisingly, wildlife/bird watching, camping and hiking are consistent with angler favourites.

Research undertaken by the Sporting Goods Manufacturers Association and the USDA Forest Service identified two major market segments related to the Sport Fishing segment: the Huntin' and Fishin' Avids and the Bass Club.

Huntin' and Fishin' Avids are active participants in all forms of outdoor recreation with an emphasis on hunting and fishing. Other popular activities include camping, group activities, walking and hiking. Major constraints to increased participation include lack of time, lack of money, no one to do activities with, crowded activity areas, inadequate information and pollution problems. Huntin' and Fishin' Avids are also interested in other outdoor/nature activities. Huntin' and Fishin' Avids are consumers of equipment that support these activities including: outdoor footwear, foul weather gear, outdoor apparel, binoculars and cameras[15]

Members of the Bass Club are primarily anglers. Bass Club members participate more in warm water fishing and motor boating. Constraints to increased participation include lack of activity companions and crowding of activity areas.

Both of these groups are likely to participate in less challenging physical activities. They are not driven by the need for excitement and marketing should focus on outdoor comfort and practicality of use.

Growth Sectors

From 1982-83 to 1997, a number of activities experienced growth in the US market. Bird watching had the highest growth, 155% from 21 million to 54 million participants. Hiking grew 94%, backpacking 73%, downhill skiing 59%, and primitive area camping (58%).[16]

US participation in viewing or studying activities including bird-watching, wildlife viewing, and studying nature increases until about age 40 where it reaches a high of over 80% and then declines. Over the age of 60, less than 60% of the population participates in viewing or studying activities.[17]

Participation in hunting has declined in recent decades. Participation rates remain relatively constant at around 10% until the age of 60 when they drop to less than 5%.[18] For this reason as well as the consumptive reputation of hunting which is not consistent with other identified “nature activities”, hunting was not specifically included in the Consumer Survey.

Participation rates in fishing decrease as people age moving from a high of over 35% through to age 40, to approximately 30% from ages 40-49, 25% for ages 50-59. over the age of 60 participation rates remain comparatively high at approximately 15%.[19]

Priority Sectors Identified for Primary Research

Bird watching, hiking, backpacking and camping were chosen for further survey work, based on the following analysis:

- These activities were the 1,2,3 and 5th rated growth sectors in the U.S. in 2003 (Figure 36 - Trends in Participation for Selected Outdoor Activities),
- Camping and hiking were identified as the first and second “other activity” engaged in by B.C. anglers.
- The Women in the Outdoors 2005 survey identified hiking or backpacking (39%), fishing (39%), camping (37%), bird watching (37%), primitive cooking (36%) as activities undertaken in the U.S.[20]

The table below lists a variety of product categories that were developed from on-line retailers of bird watching, hiking, back packing and camping gear. As can be seen in the cross reference, there are similar equipment needs to fishing across many of the categories.

Figure 3 - Product Categories for Complementary Activities

	Fishing	Bird watching	Hiking	Back packing	Camping
Back packing books, magazines, DVDs or videos				X	
Backpacks				X	X
Binoculars or spotting scopes	X	X	X	X	X
Bird feeders and bird food		X			
Bird watching books, magazines, DVDs or videos		X			
Birdhouse cameras		X			
Camping furniture and cots				X	X
Camp stoves and cooking equipment				X	X
Camping books, magazines, DVDs or videos				X	X
Daypacks and hydration	X	X	X	X	X
GPS units, altimeters, compasses	X	X	X	X	X
Headlamps and flashlights	X			X	X
Hiking books, magazines, DVDs or videos			X		
Hiking shoes and boots	X	X	X	X	X
Knives and tools	X	X	X	X	X
Maps	X	X	X	X	X
Outerwear and rainwear	X	X	X	X	X
Sleeping bags				X	X
Sleeping pads				X	X
Tents				X	X
Walking sticks and poles			X	X	
Water purification, filters				X	X

SECONDARY RESEARCH – RETAIL SECTOR

Participants

The retail industry for freshwater sport fishing equipment is made up of:

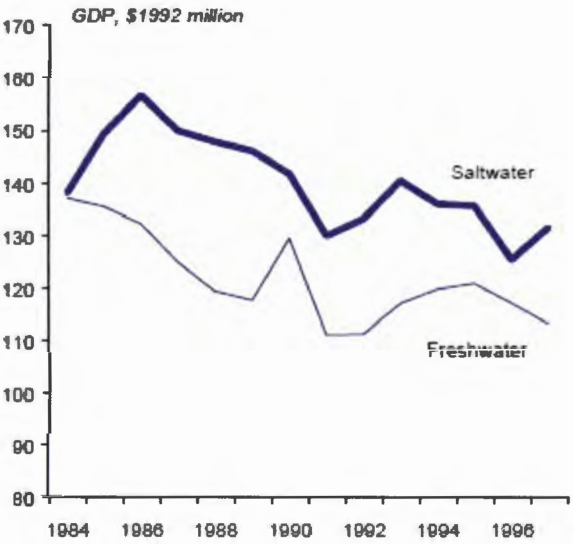
- Independent owner-operators. These are typically single-store operations run by local proprietors. Independent stores are a prime source of local information on fishing locations and the "right gear" for local conditions.
- Sporting goods stores carrying a variety of sporting goods, a portion of which is made up of sportfishing equipment.
- Hardware and general stores carrying a variety of goods, a portion of which is made up of sportfishing equipment.
- Discount chains and superstores such as Wal-Mart and Canadian Tire. These stores are focused primarily on the lower-end mass merchandise market. Store staffs are not typically knowledgeable about the sport.
- On-line retailers, the largest and most established of which is Cabelas (http://www.cabelas.com/). Cabelas offers a full line of outdoor equipment including a wide selection of medium to high quality fishing gear.

This focus of this report is on the independently-operated specialty freshwater fishing/tackle stores.

Industry Performance

Sport fishing and retail tackle stores are not segmented by a Standard Industrial Classification (SIC) code by Statistics Canada. As a result there are no readily available and consistent measures of the economic impact or growth of the industry. BC Stats extrapolates data for the industry from a number of other service-sector industries. An analysis of this data shows a general decline of overall GDP for the sport fishing industry in B.C.

Figure 4 - B.C. Sport Fishing GDP



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Independent owner-operators have been particularly hard-hit over the past 10 years through a combination of increasing competition from discount chains and Internet retailers and a shrinking market. In the lower mainland of BC for example, seven tackle stores closed in 2004/05[22].

Retail Trends

Mass Merchandisers, Discount Stores and Specialty Stores

The structure of the retail industry in Canada has changed significantly over the past 10 years, primarily through the growth in mass merchandisers, discount stores and specialty stores (category killers), driven by consumer demand for both low prices and convenience. Operations such as Wal-Mart are leading the way with competitive advantages based on "everyday low pricing" and advanced logistics systems.

The primary impact of these changes on fishing and tackle stores has been the loss of the medium to low end market to mass merchandisers such as Canadian Tire and Wal-Mart.

Retail Technology

New technologies are being used increasingly to create competitive advantage in the retail sector. UPC codes and point-of-sale systems have allowed for the development of a number of marketing and logistics advantages including:

- Customer loyalty programs using information collected to target products and marketing messages to consumers
- Just-in-time supply chain management using sales data collected
- Quicker check-out time
- Improved data entry accuracy

Interactive information kiosks use touch-screen technology to improve services in areas such as product information, ordering of non-stock items, self-service ordering and gift registration. The development of RFID tags will soon result in "self-service" check-outs, further reducing selling costs for large retailers.

The majority of independent tackle stores have been slow to adopt these improvements. Although these systems are rapidly becoming the standard "cost of entry" for most retail operations, it is difficult to justify these expenditures for single independent stores.

Growth of the Internet

"Connected" consumers are increasingly using the Internet for both product research and purchasing of products and services[23]. Total Internet sales have increased from $4.2 billion in 1999 to $19.1 billion in 2003. Business to consumer sales accounted for $5.5 billion of this amount. 68% of Canadians used the Internet in 2002 with 41% having made online purchases[24].

Canadians are most comfortable buying low-cost items on-line. The Internet is also used to research more expensive items (Figure 31 - Top Items Researched/Purchased Online).

The Internet provides consumers with:

- instant access to product information and comparative pricing
- increased selection of goods and services
- dynamic pricing models such as airline tickets that are priced differently depending on when you buy them
- sharing of product and service feedback with other consumers

The Internet represents a marketing and customer-relationship building medium that is not currently well-used by independent tackle shops.

1.1.1.1 Use of the Internet by Small Firms

Eighty-two percent of all Canadian businesses were connected to the Internet in 2003. For small firms, this rate is reduced to 76%. Only 29% of small firms have their own web site and of these, only 26% have interactive capabilities.[25]

An Industry Canada survey on barriers to e-commerce identified two primary barriers to cited by small firms, goods and services do not lend themselves to Internet transactions and prefer to maintain current business model. Security concerns, costs of development, employee skills and customer readiness were also cited (Figure 32 - Barriers to E-Commerce Adoption for Small Firms).

It is interesting to note that the number one concern - goods and services do not lend themselves to Internet transactions has reduced to 44% from 52% only 3 years earlier, as more firms recognize the capabilities and advantages of the Internet.

RETAIL SURVEY RESULTS

Types of Business

For the purposes of inclusion in the Retail Survey, only those respondents with a retail presence and at least 40% of total sales from freshwater fishing equipment and supplies were included. Other business types not included in the final sample included: on-line advertising, mail-order, internet, hardware, marina, sporting goods, and general store.

Number of Locations

12 of 13 respondents indicated that they operated one location. One respondent indicated two locations. This result is consistent with the assumption that the retail specialty freshwater fishing/tackle sector in British Columbia is dominated by independent owner-operated stores.

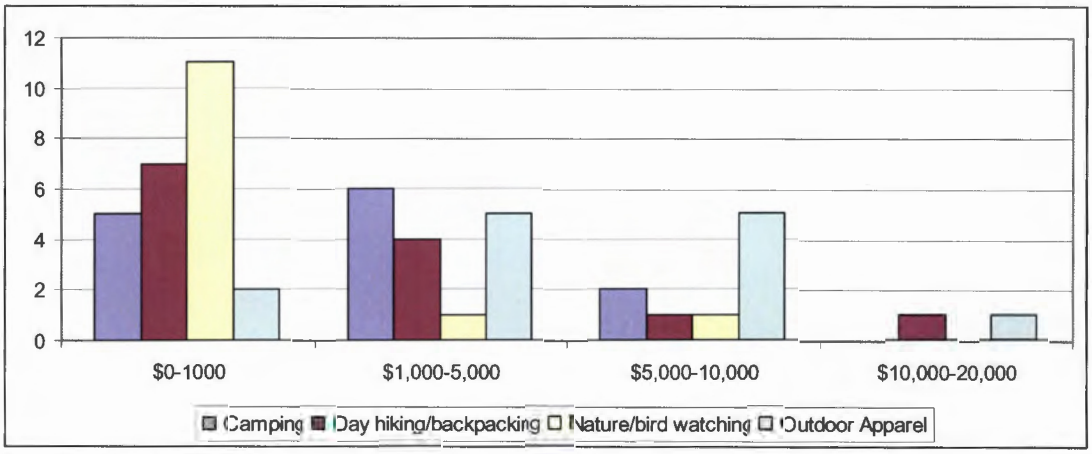
Sales Profile

Included respondents generate 57% of their sales from freshwater fishing equipment and supplies. 12% of sales comes from saltwater fishing equipment and supplies, 10% from hunting equipment and supplies and 21% from other goods and services (Table 3 – Retail Survey: Sales by Product Category).

Sales of Complementary Goods

Current sales of complementary goods and services by included respondents are limited. This is not surprising given that the survey sample was limited to respondents who generate at least 40% of their total sales from freshwater fishing equipment and supplies. The largest categories of complementary goods were outdoor apparel with 10 of 13 respondents indicating sales of $1,000 to $10,000 and one at $10,000 to $20,000, followed by camping supplies and equipment with 8 of 13 respondents indicating sales of $1,000 to $10,000, and day hiking/backpacking with 5 respondents indicating sales of $1,000 to $10,000 and one at $10,000 to $20,000 (Table 4 - Retail Survey: Sales from Complementary Goods).

Figure 5 - Retail Survey: Sales of Complementary Goods



Rental Items

There was very little sales indicated from rental items with only two respondents indicating rentals of pontoon boats and fishing gear with sales of $1,000 to $5,000 per year(Table 5 – Retail Survey: Sales from Rentals). One respondent indicated that they rent DVDs and videos.

Trip/Travel Services

5 of 13 respondents indicated that they organize/package guiding and charter services. Two of 13 respondents indicated that they organize/package fishing vacations (Table 6 - Retail Survey: Trip/Travel Services). None of the respondents organize or package lodging or transportation services.

Events and Promotions

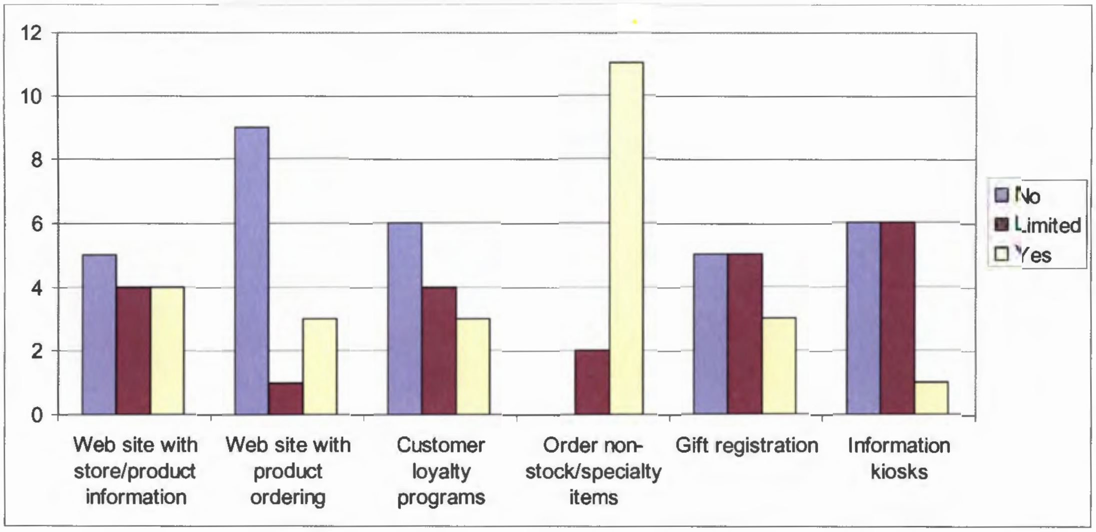
The most popular activities organized and/or promoted by retail respondents were fishing clinics/workshops with 3 of 13 offering more than 10 workshops per year, 1 offering 5-10 and 7 offering 1-5 per year. Fishing derbies and family fishing events were next with 8 of 13 offering 1-5 events per year. Four respondents offer 1-5 "fishing buddy" programs per year (Table 7 - Retail Survey: Promotion of Activities).

Other events and promotions cited by survey respondents included: movie nights, party fly-tying nights, familiarization trips, fly-casting competitions, information sessions for new customers, and spey claves.

Shopping/Convenience Services

Retail respondents have limited e-commerce capacity. 8 of 13 respondents have a web-site with information on their store and/or products carried, and only 3 of 13 have e-commerce capability. 3 of 13 indicate that they provide customer loyalty programs with 4 indicating limited service in this area. The majority of stores indicate that they provide customers with the ability to order non-stock and specialty items. Gift registration is offered by 3 of 13 stores with 5 stores indicating limited service in this area. One store indicated that they provide information kiosks with product and fishing information with 6 stores indicating limited service in this area (Table 8 - Retail Survey: Shopping/Convenience Services).

Figure 6 - Retail Survey - Shopping/Convenience Services



Other shopping/convenience services cited by respondents included: a mobile tackle van and mail order catalogue.

Cooperative Activities

Formal cooperative activities are limited. 10 of 13 respondents indicated that they share information and approaches with other retailers occasionally or often. Three indicate that they engage in cooperative advertising with suppliers "often with 7 additional respondents indicating "occasionally". 5 of 13 respondents indicate that they occasionally engage in buying groups and cooperative advertising with other retailers (Table 9 - Retail Survey: Cooperative Activities)

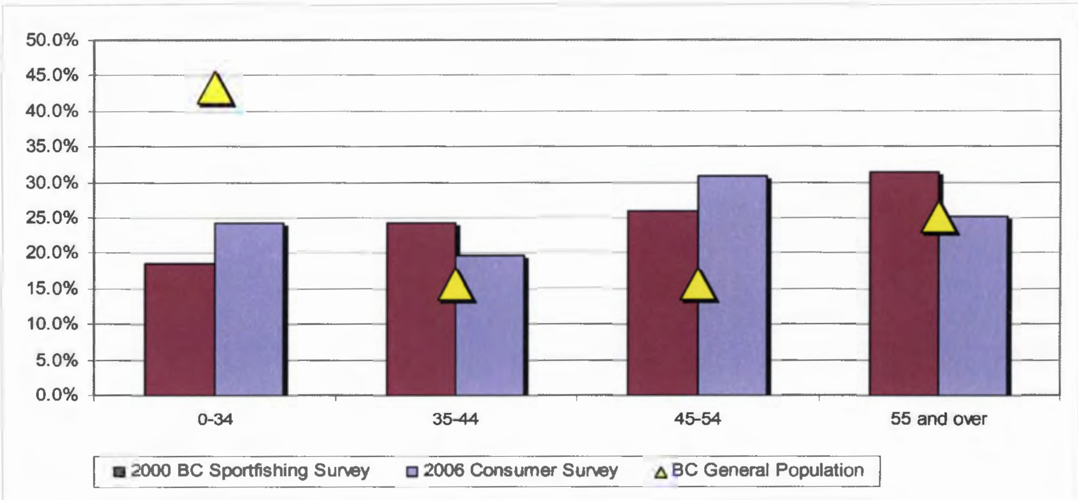
Other cooperative activities cited by respondents included: stock swapping with other retailers and referrals on guiding.

CONSUMER SURVEY RESULTS

Age and Sex

The 2006 Consumer survey indicates the highest participation rates in the 45-54 year age group at 30.9 % of total respondents. The next highest group is the 55 and over age group at 25.1% of respondents. The 35-44 year age group made up 19.7% of respondents with the 0-34 year age group making up only 24.3% of respondents, compared to 45.8% of the BC population (Table 10 - Survey of Sportfishing, Consumer Survey and BC Stats: Age Group).

Figure 7 - 2006 Consumer Survey Respondents by Age with Comparison to the 2000 BC Sportfishing Survey and 2005 BC Population Statistics

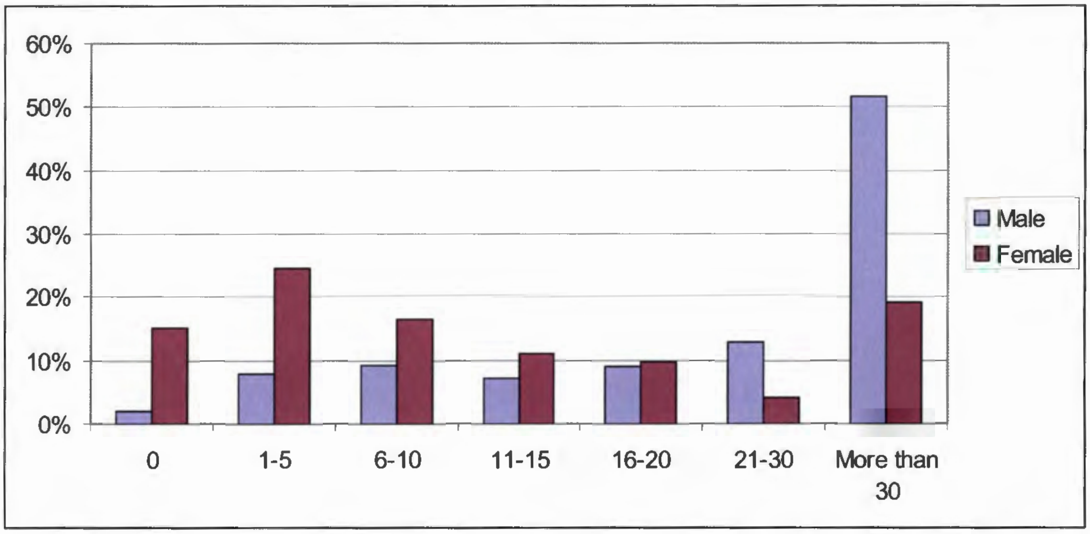


The 2000 BC Sportfishing survey is also shown for comparative purposes

Males made up 87.2% of survey respondents. This is somewhat higher than the 2000 Survey of Sportfishing in British Columbia results of 78.1% male. These results are attributed to the fact that more male anglers are "angling avids" who are more likely to visit web-sites and belong to clubs associated with fishing.

52% of Male survey respondents fish more than 30 days per year compared to 19% of Female respondents. As stated above, it is expected that the survey methodology resulted in a higher percentage of avid anglers as compared to the general population.

Figure 8 - Consumer Survey: Days Fished by Sex



A participation index was developed by dividing age group percentages for the BC general population by the age group percentages for the 2000 Survey of Sportfishing in British Columbia. The results of that analysis are as follows:

Table 1 - Fishing Participation Index

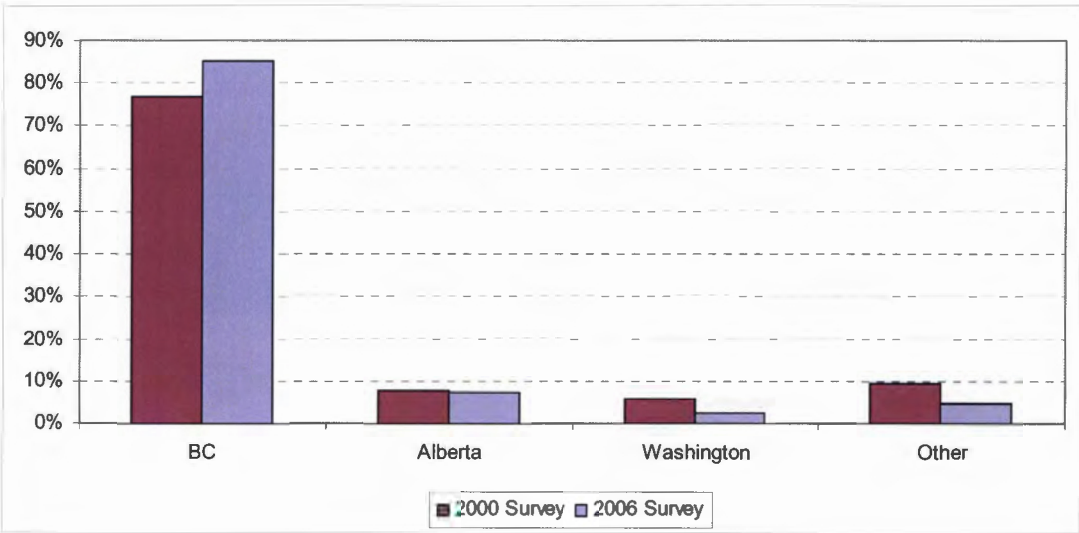
	2000	BC - 2000	Index	2006	BC - 2005	**Index**
Under 20	2.6%	23.7%	**0.11**	3.3%	22.9%	**0.14**
20-24	3.2%	6.2%	**0.52**	4.2%	7.1%	**0.68**
25-34	12.7%	13.6%	**0.93**	16.7%	13.4%	**1.23**
35-44	24.2%	16.3%	**1.48**	19.7%	15.8%	**1.21**
45-54	25.9%	14.0%	**1.86**	30.9%	15.7%	**2.22**
55-64	18.2%	8.8%	**2.07**	19.5%	11.4%	**2.22**
65 and over	13.2%	12.4%	**1.06**	5.6%	13.8%	**0.45**

The highest participation rates are clearly in the 45-54 and 55-64 year age group at an index value of 2.10 and 2.11 using the 2006 Consumer Survey data. It is expected that as the 55-64 year age group moves into the next age cohort, their participation rates will begin to decline, further reducing the total numbers of anglers.

Location

The survey methodology for the 2006 Survey resulted in a higher proportion of survey respondents from British Columbia at 85% versus 77% for the 2000 Survey of Sportfishing in British Columbia. Survey responses from Alberta were comparable at 7% versus 8% for the 2000 Survey. Other respondents totalled 5% versus 9% for the 2000 Survey.

Figure 9 – Survey Respondents by Province/State



Size/Type of Community

54% of survey respondents indicated that they lived in an urban or suburban community. According to Statistics Canada data 85% of the BC population lived in urban areas in 2001. The numbers of people living in urban communities is increasing: from 80% in 1990 and 78% in 1981[26]. This trend will continue to negatively affect the overall market for sportfishing.

This analysis supports previous research that indicated that angler participation is decreasing as population moves to urban centres.

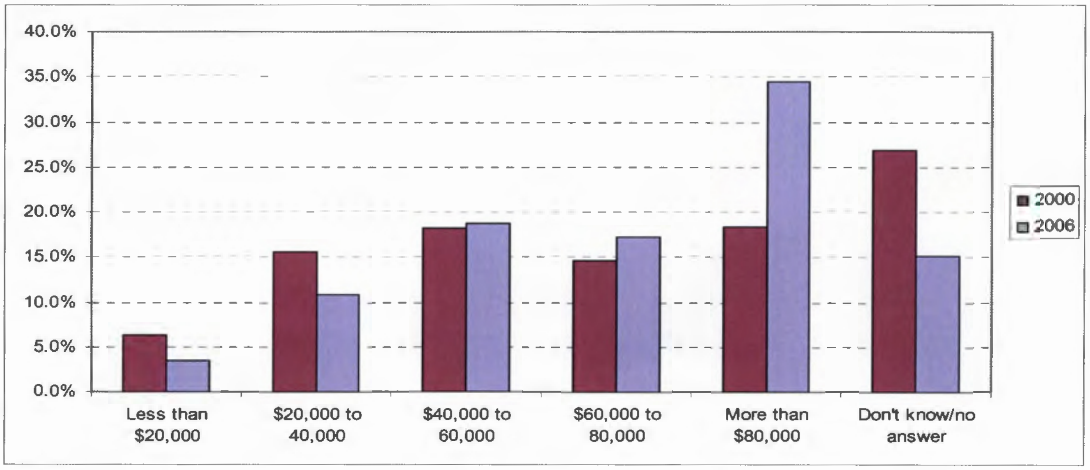
Figure 10 - 2006 Survey Respondents by Type of Community

Income

52% of survey respondents indicated a household income of over $60,000. These individuals represent potential markets for enhanced service offerings.

When compared to the 2000 Survey of Sportfishing in BC, the 2006 Survey results show a disproportionate share of anglers indicating an income of more that $80,000 (Table 15 - BC Survey of Sportfishing and Consumer Survey). It is not clear to what extent this difference is a result of: a different survey sampling methodology, changing incomes over time, and/or fewer don't know/prefer not to answer responses to the 2006 Survey.

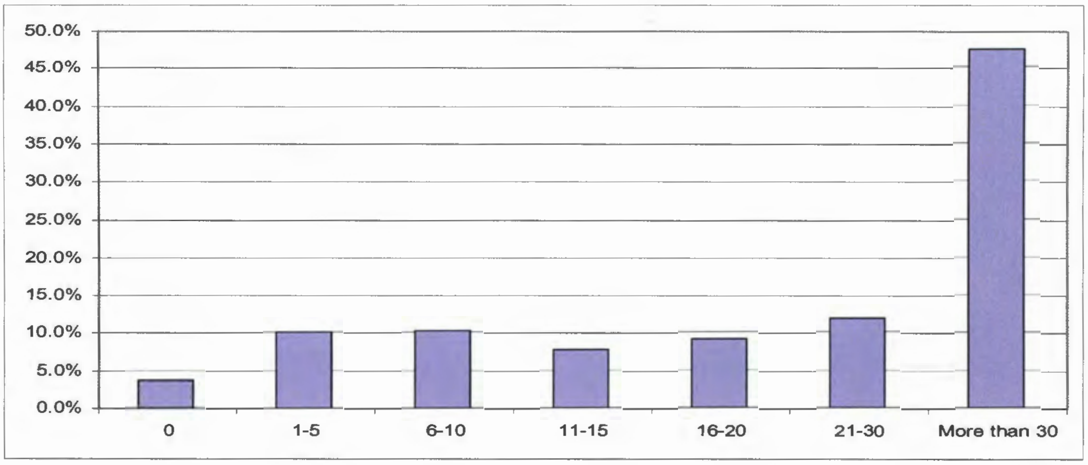
Figure 11 - Angler Income Groupings



Angler Participation

Almost half of the survey respondents fished over 30 days in the last year. (Table 16 – Consumer Survey: Days Fished in 2005). These results should be viewed in the context of the survey limitations outlined in the Survey Methodology section, particularly in regard to the assumption that "avid" anglers were more likely to be survey participants.

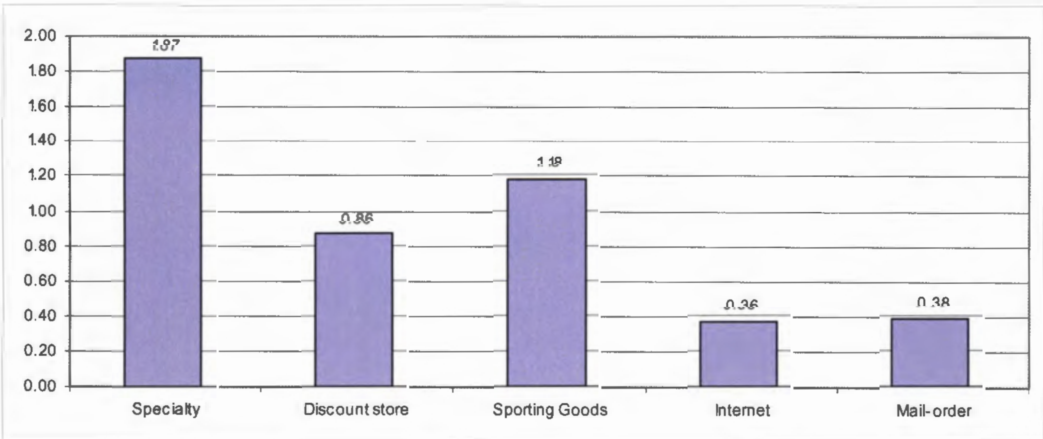
Figure 12 - Days Fished in 2005



Where Anglers Shop

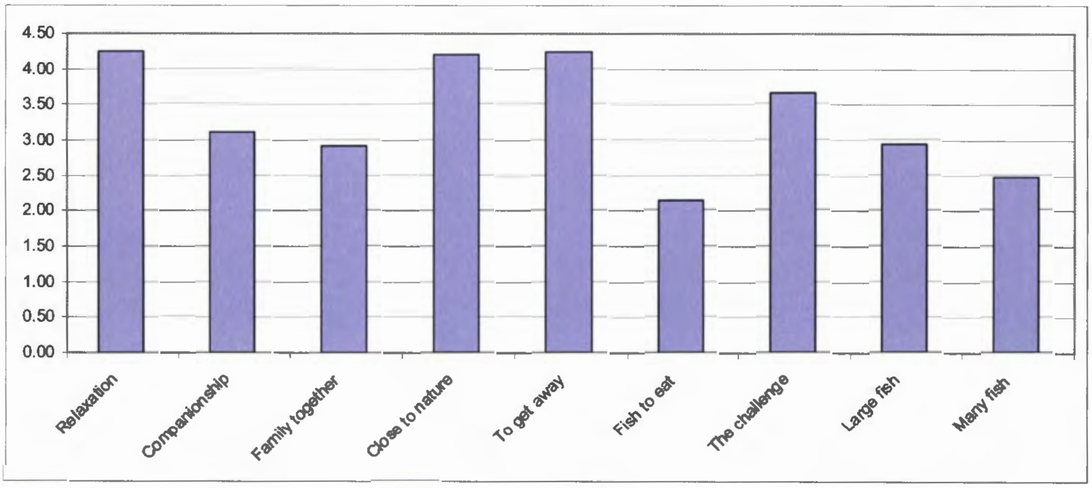
Survey respondents were asked where they bought their fishing gear /tackle. Results were rated on a four point scale from 0 = "never" to 3 = "always". Specialty fishing/tackle stores were rated highest at 1.87 (Table 17 – Consumer Survey: Where Anglers Shop).

Figure 13 - Where Anglers Shop



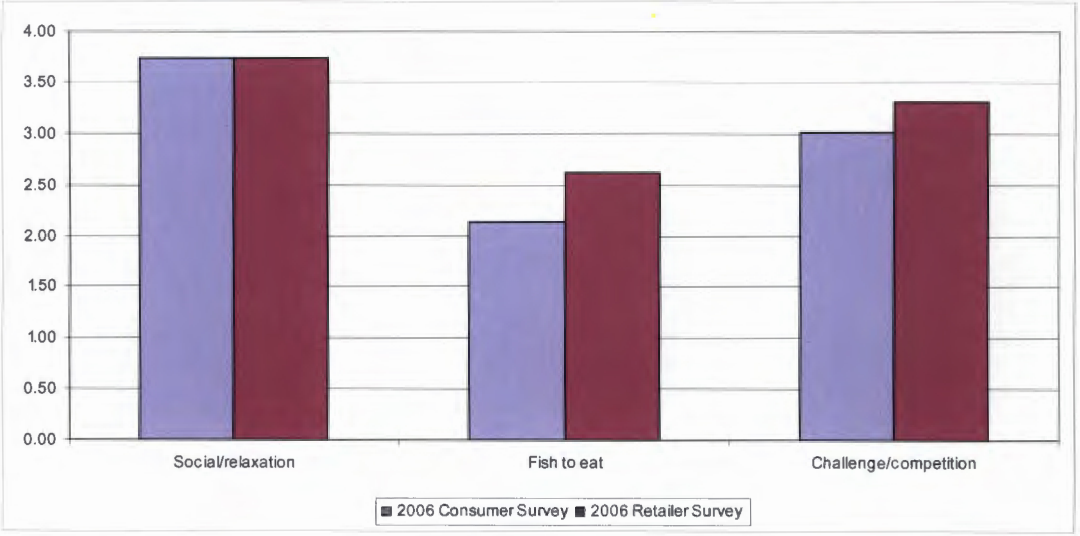
Motivation for Fishing

The 2006 Survey asked respondents to rate the reasons why they fish against a variety of "motivations". These results (Table 18 – Consumer Survey: Angler Motivation for Fishing) were consistent with the U.S. National Survey of Fishing, Hunting, and Wildlife-Associated Recreation and with the 2000 Survey of Sportfishing in British Columbia. The strongest motivations are in the social/relaxation grouping (relaxation, companionship, family togetherness, close to nature and to get away) with the challenge/competition grouping (for the challenge, for large fish, many fish) of lower importance and "fish to eat" rated at the lowest level.



These trends beg the questions as to the extent to which the retail fishing industry is aware of this shift in motivation. A comparison of the 2006 Consumer and Retail Survey results shows that Retailers understanding of "fishing motivators" match reasonably well with consumer responses, particularly in the social/relaxation aspects. Retailers tend to put somewhat higher emphasis on fishing to eat and for challenge/competition than consumer responses.

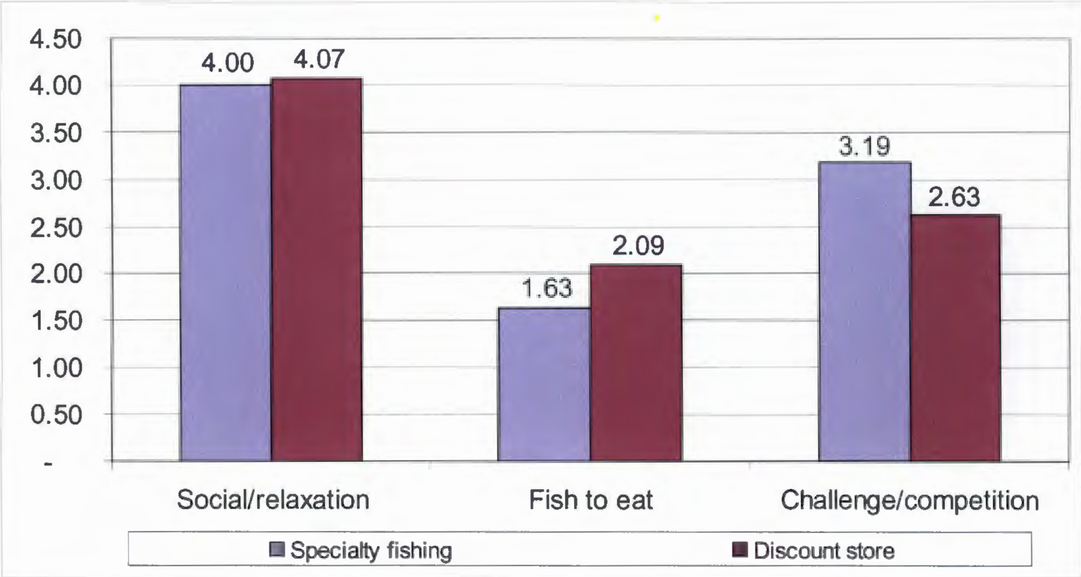
Figure 14 – Consumer/Retailer Comparison of "Reasons for Fishing"



Retailers need to be sure to use appropriate marketing messages – moving away from a focus on "catching the big one" and the competitive aspects of fishing and toward messages and services that support changing consumer expectations.

An assumption going into the survey was that consumers who shopped primarily at fishing/tackle stores would fall into the challenge/competition category with discount stores attracting a greater proportion of anglers with relaxation/social motivations. The following figure shows the index of motivation for fishing by store type. The index is based on a scale of 1-5 with 1 being not important and 5 being extremely important (Table 20 – Consumer Survey: Angler Motivation by Store Shopped).

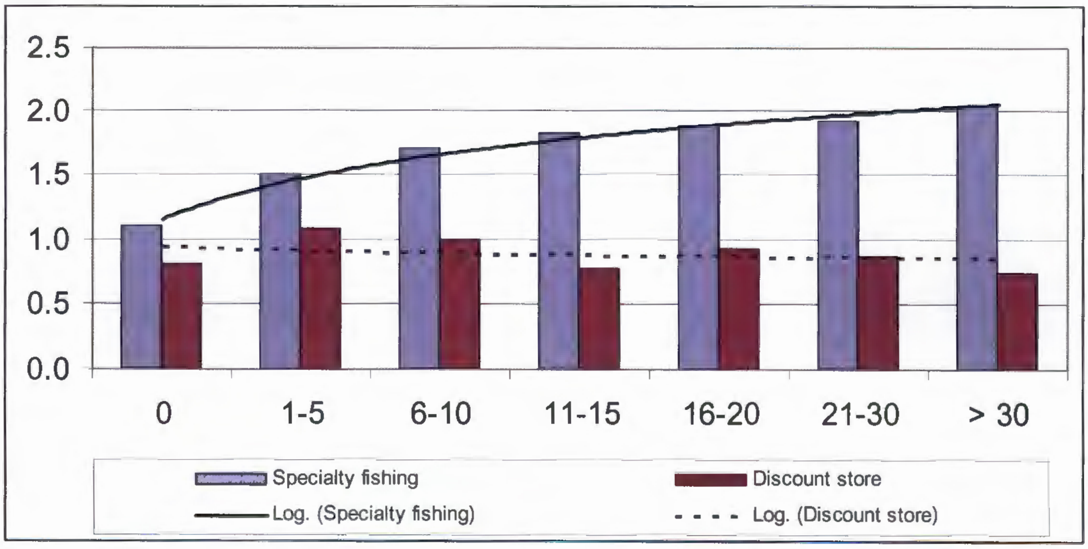
Figure 15 - Motivation for Fishing by Store Always/Mostly Shopped



Consistent with previous research, social/relaxation motivation is high for all anglers. Anglers who always or mostly shop at discount stores are more highly motivated by fishing to eat and less motivated by fishing for challenge/competition.

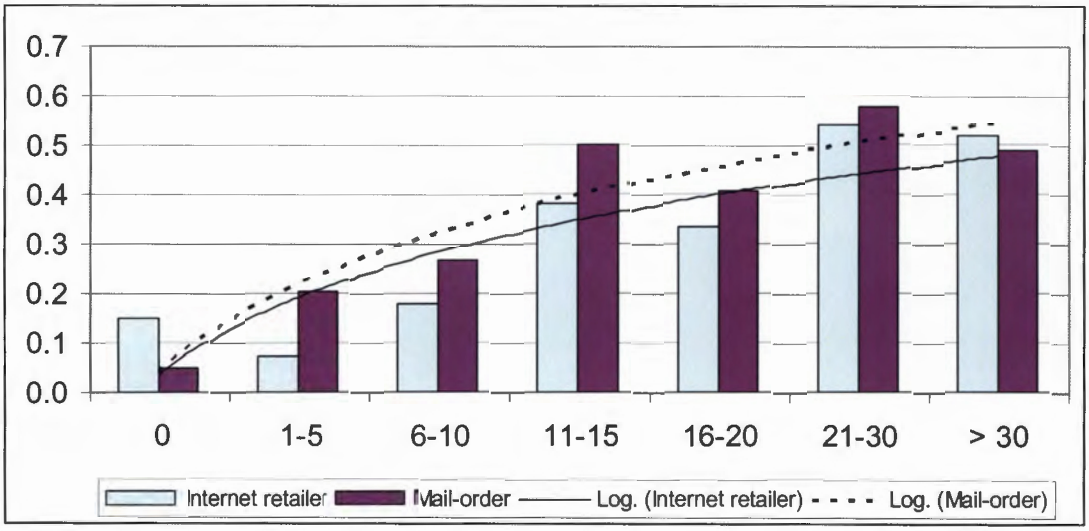
A comparison of days fished by store type also supports this assumption.

Figure 16 - Days Fished by Store Shopped



Survey respondents were asked where they buy their fishing gear/tackle. Responses were converted to an index weighting of 0-3 where 0 equals "never" and 4 equals "always". As can be seen from the chart above, survey respondents transfer greater amounts of purchases to specialty fishing/tackle stores as their fishing activity increases. Survey respondents who fished 30 days or more scored 2.0 on the index compared to only .7 for discount stores. Anglers also increase their levels of on-line and mail order purchases as fishing days increase.

Figure 17 - Days Fished by Internet/Mail Order Shopping



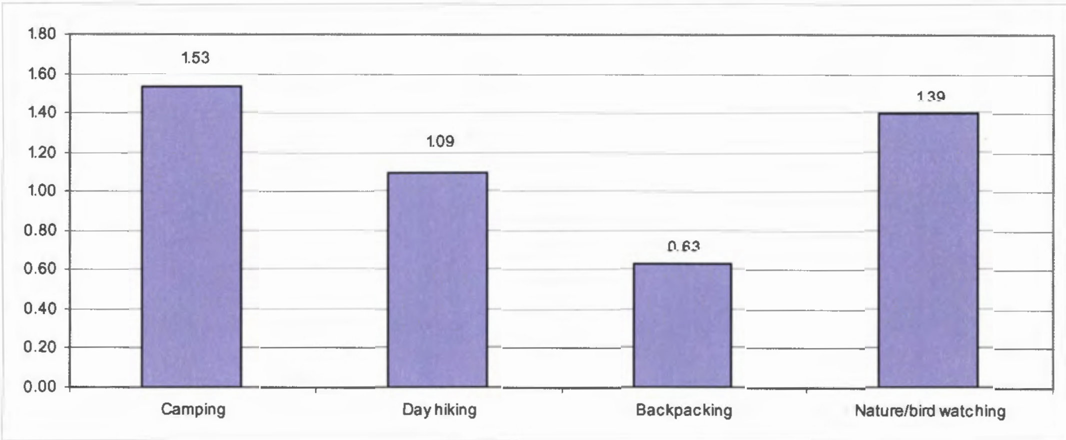
Activities Engaged in by Survey Respondents

Retail fishing/tackle stores should attempt to capture more of the Internet and mail-order business by improving their selection and/or providing enhanced abilities for customers to purchase non-stock and specialty items through the retail location.

Complementary Activities

Survey respondents were asked the extent to which they engaged in camping, nature and bird watching, day hiking and backpacking during fishing trips. 52% of survey respondents indicated that they engaged in camping often or always while fishing. 44% engaged in nature/bird watching often or always and 34% engaged in day hiking and/or backpacking (Table 22 – Consumer Survey – Other Activities Engaged in While Fishing). Results were also averaged on a four point index from 0 = never to 3 = always.

Figure 18 - Complementary Activities Engaged in While on Fishing Trips



These activities represent opportunities for Retailers to consider additional products and/or services that are complementary to their current product lines. Respondents were also asked to list other activities engaged in during fishing trips. Responses to this question were summarized as follows:

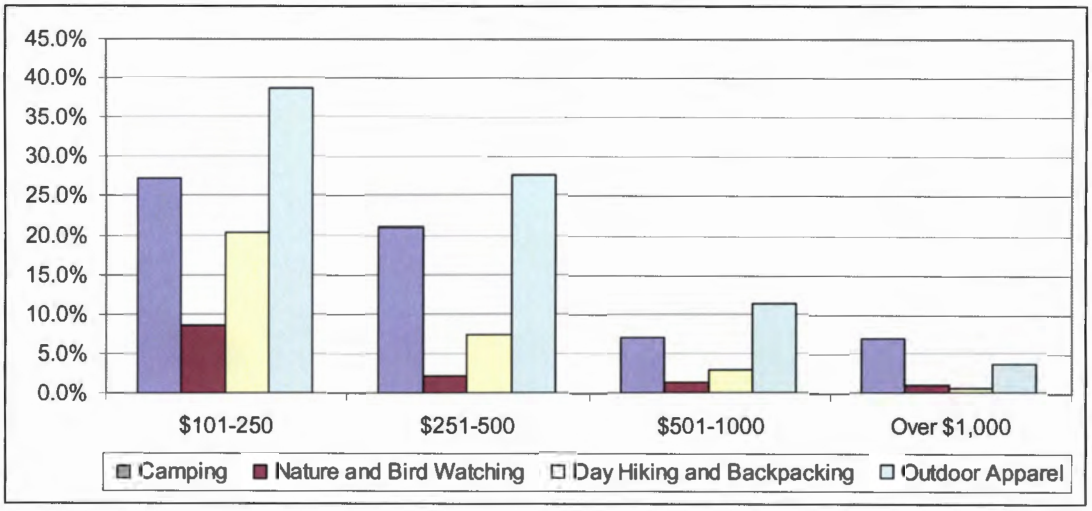
Table 2 - Additional Activities Engaged in While on Fishing Trips

WATER ACTIVITIES	**70**
Boating	22
Canoeing	15
Swimming	14
Kayaking	6
Rafting	4
Diving / snorkeling	4
Water sports	2
Sailing	2
Personal watercraft	1
OUTDOOR SPORTS	**53**
Hunting	31
Mountain / bicycling	16
Target shooting	2
Sports	2
Archery	1
Snow shoeing	1
PHOTOGRAPHY	**51**
EXPLORING	**37**
Exploring	16
Prospecting / rockhounding	7
Mushroom / berry hunting	7
Beach combing	3
Geocaching	2
Artifact hunting	1
Fossil hunting	1
CAMPING ENTERTAINMENT	**28**
Reading	13
Drawing/painting/writing/crafts	6
Card and board games	4
Kite flying	2
Music / guitar	2
Bocci ball	1
LOCAL ENTERTAINMENT	**27**
Sight seeing	9
Shopping	6
Local restaurants / pubs	5
Golfing	5
Theatre	1
Local history	1
ATV / DIRT BIKE / 4-WHEELING	**18**
FISHING RELATED ACTIVITIES	**20**
Fly tying	9
Entomology and aquatic macroinvertabrates	4
Conservation activities - education / tagging	3
Study / view fish	2
Guiding	2
COOKING	**16**
Outdoor cooking	11
Picknicking	4
Gourmet cooking	1
OTHER	
Drinking (primarily beer)	18
Cigar/pipe/smoking	5

Expenditures on Complementary Activities

Respondents were asked to indicated their annual expenditures on equipment and supplies for complementary activities and outdoor apparel (Table 23 - Consumer Survey: Annual Expenditures on Complementary Activities).

Figure 19 - Annual Expenditures on Complementary Activities



Nature and bird watching received the second highest indexed response re: other activities engaged in while fishing at 1.39 out of 3. Respondents spend very little on this activity however, with 50.3% of respondents indicating that they spend $0 per year , 36.9% spending less than $100 per year and 10.7% spending from $100 to $500 per year.

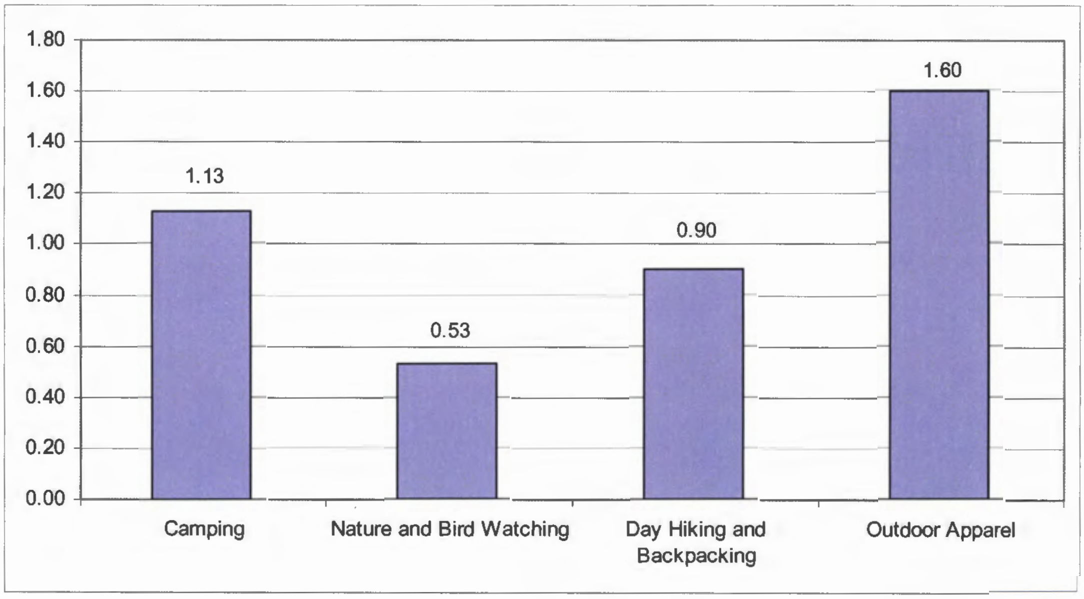
Day hiking had a participation index response of 1.09. Backpacking had the lowest participation response at .63. These activities also had the next lowest annual expenditures with 25.5% of respondents indicating that they spend $0 per year, 43.6% spending less than $100 per year and 20.2% spending from $100 to $500 per year.

Camping had the highest participation rate at 1.53. Camping and outdoor apparel had significantly higher expenditure patterns. 13.6% of respondents indicate that they spend over $500 per year on camping equipment and supplies. An additional 48.1% spend between $101 and $500 per year. 14.7% of respondents indicate that they spend over $500 per year on outdoor apparel. An additional 66.3% spend between $101 and $500 per year.

Purchase Interest in Complementary Goods and Services

Respondents were asked to rank their interest in purchasing complementary goods and services from specialty fishing/tackle stores (Table 24 – Consumer Survey: Interest in Complementary Goods and Services). Results were averaged on a four point index from 0 = not at all interested to 3 = very interested.

Figure 20 - Purchase Interest in Complementary Equipment and Supplies



55.5% of respondents indicated that they were interested or very interested in purchasing outdoor apparel from retail fishing/tackle stores. 32.7% of respondents indicated that they were interested or very interested in purchasing camping equipment and supplies from retail fishing/tackle stores. Results of camping and outdoor apparel are consistent with the areas where consumers make the greatest annual purchases. Based on this analysis, camping equipment and supplies and outdoor apparel represent good potential opportunities for Retailers.

Respondents were also asked to list other equipment and supplies that they would be interested in purchasing from retail fishing/tackle stores. Responses to this question were summarized as follows:

Figure 21 - Respondent Requests for Other Equipment and Supplies

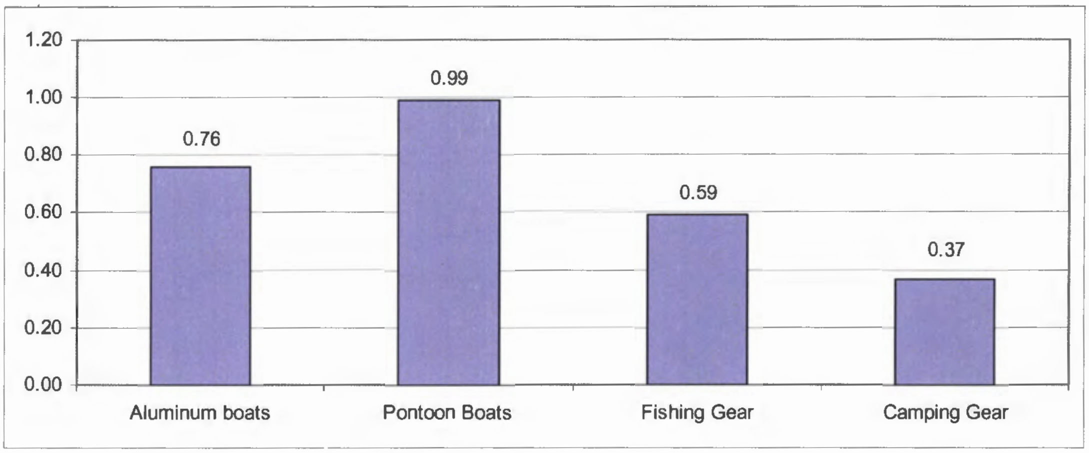
FISHING RELATED	**38**
Fly fishing and tying equipment / supplies	19
Fishing equipment / supplies	7
Fishing books	3
Rod building blanks / materials	2
Books on fishing	2
Waders and wading boots	2
Fish processing equipment	1
Bait	1
Licenses	1
BOATING	**16**
Boats	4
Boating equipment / accessories	4
Depth sounders / fish finders	3
Canoeing / kayaking gear	2
Personal flotation devices	1
Rain wear	1
Personal watercraft gear	1
OUTDOOR EXPLORATION	**14**
GPS units	6
Maps / charts	6
Optics / binoculars	2

HUNTING SUPPLIES / EQUIPMENT	**10**
FOOD	**7**
Beer	3
Snack foods / drinks	2
Dehydrated food	1
Ice	1
SAFETY RELATED	**5**
Safety / first aid equipment	3
Bear bangers and pepper spray	1
Sun block	1
PHOTOGRAPHIC EQUIPMENT / FILM	**5**
OTHER	
Books	2
Novelty items	2
Adventure / specialty luggage	1
Cigars	1

Rental Opportunities

Respondents were asked to rank their interest in renting items from specialty fishing/tackle stores. Results were averaged on a four point index from 0 = not at all interested to 3 = very interested.

Figure 22 - Interest in Rental Items



30.4% of respondents indicated that they were interested or very interested in renting pontoon boats from retail fishing/tackle stores. 23.4% of respondents indicated that they were interested or very interested in renting aluminum boats. 16.8% of respondents indicated that they were interested or very interested in renting fishing gear, and only 7.4% indicated that they were interested or very interested in renting camping gear.

Comments from the survey also indicated an interest in renting fishing gear on a try-before-you-buy basis.

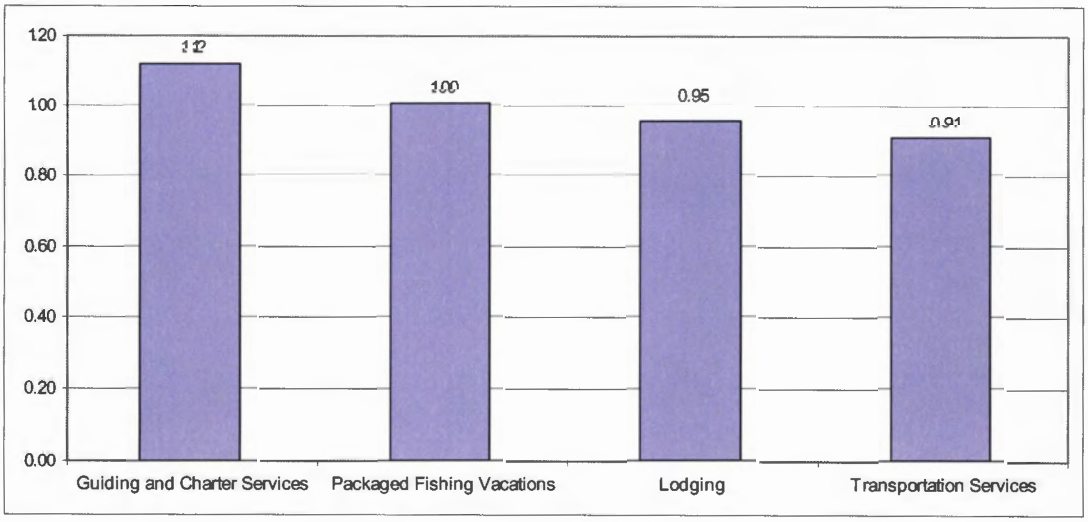
Respondents were also asked to list other equipment that they would be interested in renting from retail fishing/tackle stores. Responses to this question were summarized as follows:

BOATING	**21**	**FISHING**	**8**
Boats	5	Wading equipment	4
Canoe / gear	4	Quality rods and reels	2
Drift boat	3	Depth/fish finder equipment	1
Kayaks	2	Specialty tackle ie spey flyfishing, halibut	1
Boat motors	2		
Belly boats and fins	2	**OTHER**	
Pontoon boats	1	Motor Homes / campers	2
Small punts	1	High end cameras	1
Rubber raft	1	Waterproof cameras	1
		Hiking gear	1
		GPS mapping equipment (chips)	1
		Utility Trailers with boat racks	1

Interest in Trip/Travel Services

Respondents were asked to rank their interest in purchasing trip/travel related services from specialty fishing/tackle stores. Results were averaged on a four point index from 0 = not at all interested to 3 = very interested.

Figure 23 - Interest in Trip/Travel Services



32.2% of respondents indicated that they were interested or very interested in purchasing guiding and charter services from retail fishing/tackle stores. 28.8% of respondents indicated that they were interested or very interested in buying packaged fishing vacations. 25.8% of respondents indicated that they were interested or very interested in buying lodging services and 23.7% indicated that they were interested or very interested in buying transportation services.

These results are consistent with the primary challenges stated by anglers – lack of time. Services focused on simplifying the purchasing process for anglers are likely to meet with success.

Respondents were also asked to list other services that they would be interested in purchasing from retail fishing/tackle stores. Responses to this question were summarized as follows:

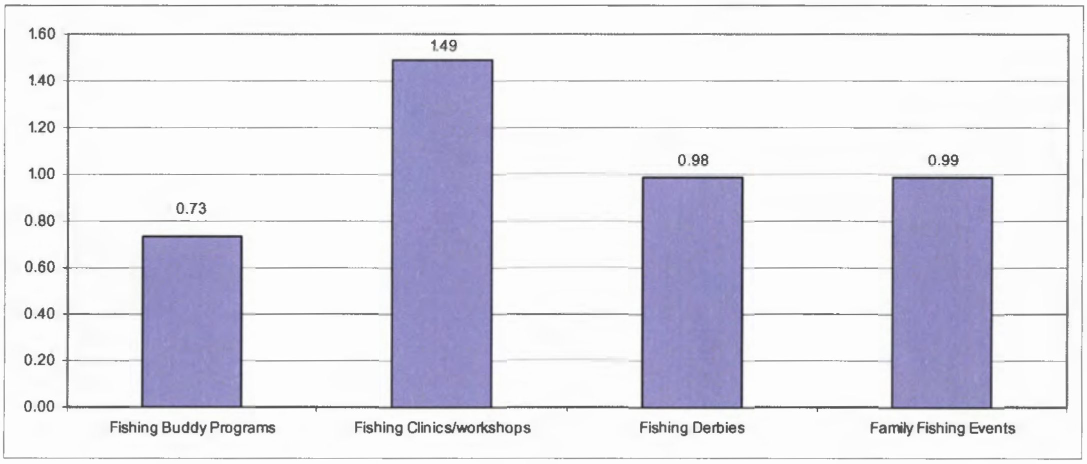
LESSONS / INFORMATION	**11**
Fishing lessons/coaching	4
Fly fishing lessons	2
Casting and tying lessons	1
Information	1
Self guided handbook for fishing a particular area.	1
Specific fishery knowledge	2
PROCESSING - canning, smoking, freezing, packaging	**3**

OTHER	
Rod/reel maintenance and repair	3
Rod building	1
Maps, GPS locator,	1
Vehicle shuttling from a boat launch to a take out	1
Shuttle service for rafting rivers	1
International fishing vacation opportunities	1
Recreational real estate	1

Interest in Events/Activities

Respondents were asked to rank their interest in events and activities that could be organized by specialty fishing/tackle stores. Results were averaged on a four point index from 0 = not at all interested to 3 = very interested.

Figure 24 - Interest in Events/Activities



50.6% of respondents indicated that they were interested or very interested in fishing clinics/workshops. 31.8% of respondents indicated that they were interested or very interested in fishing derbies and 29.3% of respondents indicated that they were interested or very interested in family fishing events. Only 18.5% of respondents indicated that they were interested or very interested in “fishing buddy” programs.

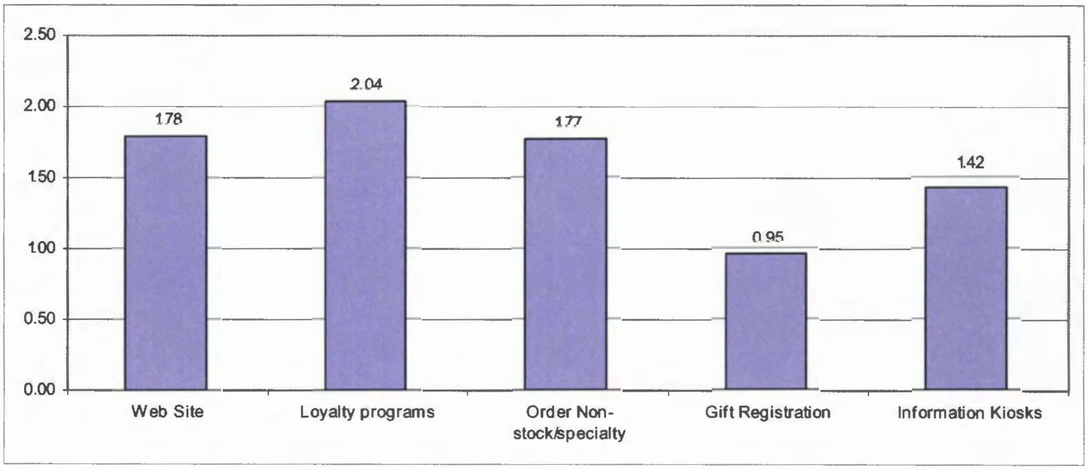
Respondents were also asked to list other events and activities that could be organized by specialty fishing/tackle stores. Responses to this question were summarized as follows:

SEMINARS / TRAINING	**23**	**ACTIVITIES / EVENTS**	**16**
Fly tying clinics	5	Club sponsorship / events	3
Casting clinics (fly fishing)	4	Demo days for equipment	3
Seminars	3	Kids events / days	3
Angler ethics	2	Competitions / derbies	2
On-the-water / field clinics	2	Spey claves	1
Fishing clinics for women	2	Flyfishing Expos	1
Rod building courses	1	Hiking tours	1
Drop-in fly tying	1	Guiding information	1
Casting certification	1	Blind dates for anglers	1
Entomology	1		
Photography for anglers	1	**CONSERVATION**	**15**
		Conservation awareness	6
BOATING CERTIFICATION	**1**	Habitat restoration / river clean-up	8
		Recycling of lines and hooks	1

Interest in Shopping/Convenience Services

Respondents were asked to rank their interest in events and activities that could be organized by specialty fishing/tackle stores. Results were averaged on a four point index from 0 = not at all interested to 3 = very interested.

Figure 25 - Interest in Shopping/Convenience Services



73.8% of respondents indicated that they were interested or very interested in purchase discounts for frequent purchase (loyalty programs). 63.8% of respondents indicated that they were interested or very interested in store web-sites. 62.9% of respondents indicated that they were interested or very interested in being able to order non-stock/specialty items. 51.1% of respondents indicated that they were interested or very interested in information kiosks. 26.9% of respondents indicated that they were interested or very interested in gift registration programs.

These results are consistent with consumer expectations for value and ease-of-purchase. Of particular interest was the ability to order non-stock/specialty items. The majority of retailers surveyed indicated that they provide this service, but the consumer survey seems to indicate that their customers are either unaware, or this current service offering is not meeting their needs adequately. Retailers should look for methods to highlight/promote this service more effectively.

CONCLUSIONS

There appear to be significant opportunities in this sector for increased economies of scale and/or scope. Cost efficiencies may be realized by spreading fixed costs over more units (stores/sales), and by taking advantage of more efficient technology. Scope efficiencies can result from sharing physical inputs, information systems, databases etc. Some examples where savings could be realized include:

- Brand value – marketing efficiencies and reduced cost per advertising impression by spreading fixed costs and reaching a wider audience
- More efficient inventory management through the use of POS technology and sharing of inventory resources
- Lowering unit costs through increased purchasing power
- Improved operations systems
- Shared training costs
- Increased sales and/or savings by increasing the variety of goods and/or service provided (leverage core competencies
- Sharing information and approaches
- Sharing costs

Angler participation is dropping across North America. The primary reasons for this are: time constraints; decreasing opportunities for fishing as waterways are developed and are no longer suitable for sport-fishing; declining fishing quality; an increase in the number of recreational alternatives; and a shift in population from rural to urban centers. Retail fishing/tackle stores are also challenged by the growth of discount stores and Internet retailers.

In order for retail freshwater tackle/fishing stores in B.C. to grow their businesses they will need to consider other products and services that can be added to the fishing package to increase store revenues. Identifying these opportunities requires an understanding of broader demographic trends and the activities and preferences of anglers.

An increasing number of fishers are fishing for relaxation, familial and naturalistic values. Potential opportunities for freshwater fishing/tackle stores include identifying and developing ways to save time for anglers, and positioning stores to support angling as a family-oriented sport. Anglers are consumers of other outdoor recreation products and services. Nature/bird watching, hiking, backpacking and camping represent growth sectors in areas that are also popular with anglers.

The majority of retail operations responding to the Retailer Survey were independent single-location stores. Sales of complementary goods and services, rental items and trip/travel services was limited. The majority of stores surveyed provide events and promotions focused on increasing customer traffic. Independent fishing/tackle stores have also been slow to adopt technology enhancements focused on improving customer service and profitability. Point-of-sale systems and e-commerce capabilities are two examples of systems that are rapidly becoming the standard "cost of entry" for most retail operations, but are difficult to implement for single independent stores. Independent stores also take limited advantage of economies-of-scale opportunities such as buying groups, cooperative advertising and sharing of training expenses.

Active/avid anglers tend to shop more at specialty fishing/tackles stores, through the Internet and through mail order. Retail fishing/tackle stores should attempt to capture more of the Internet and mail-order business by improving their selection and/or providing enhanced abilities for customers to purchase non-stock and specialty items through the retail location.

Camping equipment and supplies and outdoor apparel are the two product categories with the highest consumer expenditures and interest. These products represent complementary product and service opportunities for Retailers. Organizing and packaging charter services, packaged fishing vacations, lodging and transportation services are also a strong opportunity. Fishing clinics/workshops, fishing derbies, and family fishing events present opportunities for retailers to increase fishing participation, store traffic and improve the fishing experience for anglers. Shopping convenience services – loyalty programs, web-sites, ordering of non-stock/specialty items and information kiosks received strong interest. These services represent opportunities for retailers to capture additional market that is currently moving toward internet and catalogue stores. There was limited interest in renting pontoon and aluminum boats from retail fishing/tackle stores.

Independent retailers need to consider these opportunities carefully. A thorough understanding of the market, competition, firm resources, and the desired market position needs to be undertaken prior to moving forward with new ideas.

RESEARCH METHODOLOGY

Secondary Research

A variety of secondary research resources were accessed using Google Scholar and the University of Northern British Columbia on-line library. Secondary Research resources are listed in Appendix 5 – Bibliography.

Survey Methodology

All surveys were completed using Zoomerang© survey software.

Consumer Survey

Consumers were surveyed in order to obtain a better understanding of consumer demographics including age, sex, location, urban/rural, fishing days, fishing motivation, interest in additional products and services and interest in additional fishing-related products and services. Survey sample, objectives and question format is attached as Appendix 1.

The sample for the consumer survey was developed as follows:

- The researcher's contact list of approximately 600 addresses.
- A contact list of 322 lodges, resorts and campgrounds was developed from various fishing, camping and guiding web-sites.
- A contact list of 36 clubs, organizations and suppliers was developed from various web-sites.
- Retailers who were sent the retail survey were asked to forward the survey on to their customer/contact lists.

Each of these contacts was e-mailed the Consumer Survey request (Appendix 2 – Consumer Survey e-mail). Contacts were also asked to forward the survey to other friends and contacts who fish.

Postings were made to two fishing bulletin boards: Fly Anglers Online http://www.flyanglersonline.com/ and Sport Fishing BC http://www.sportfishingbc.com/index.htm.

A survey link was posted on the Freshwater Fisheries Society of B.C. web-site.

863 surveys were completed. Respondents who had not fished at least once in the last 5 years, or were not from British Columbia and had not purchased a BC Provincial or Federal Tidal licence in the past 5 years were excluded from the final sample. 569 completed surveys were included in the final survey analysis.

There are two primary limitations to note from this methodology. The first is that only those individuals with access to the Internet were able to complete the survey. Given that over 68% of Canadians had access in 2002 this is not expected to have had a major influence on the survey results. The second, and more important limitation is that less "avid" fishermen are unlikely to visit web sites and/or respond to surveys targeted at fishing. It is expected therefore that survey respondents would represent more active anglers.

Retail Survey

Retailers will be surveyed in order to obtain a better understanding of the number of stores owned, age and sex of the owner(s), understanding of consumer motivation for fishing, non-fishing goods and services currently offered, fishing-related goods and services currently offered, and the utilization of inventory management systems.

The sample for the retailer survey was drawn from four primary sources:

- Yellow Pages on-line listings for the category of fishing tackle retail http://business.superpages.ca/yp.basic.jsp.
- The Sportfishing BC web-site www.sportfishingbc.com
- The Province of British Columbia database of fishing licence vendors.
- Kalamalka Fly-fishers web-site http://www.kalflyfishers.ca/ .

119 potential respondents were identified. Where possible, e-mail addresses were obtained through Internet resources. Where these were not available, potential respondents were telephoned and asked for their e-mail address. This process resulted in a total of 112 Businesses who were sent a survey request through Zoomerang. In order to encourage response, respondents were offered a copy of the survey results. Two follow-up e-mails were also sent out. Twenty-five completed surveys were returned. In order to meet the profile of a Freshwater Specialty Fishing/Tackle Store only those respondents who indicated at least 40% of their total sales originating from freshwater fishing were included in the final analysis. A total of 13 surveys were included in the final results.

APPENDIX

Appendix 1 – Consumer Survey

Introduction

This survey is part of a Masters of Business Administration project being undertaken by Greg Lawrence at the University of Northern British Columbia.

The objective of the project is to identify complementary goods and services that can be offered by retail fishing/tackle stores to improve sales and profitability and enhance the customer experience.

This work is being undertaken in consultation with the Freshwater Fisheries Society of BC. The results of this survey will be shared with the FFSBC as part of a shared effort to enhance the sport fishing industry.

Your participation will provide retailers with the information they need to provide products and services that better match your needs.

Have you fished at least once in the last 5 years. Question type: Choice – one answer

- Yes
- No

Which age group do you fall into? *Question type: Choice – One Answer*

- Under 20
- 20-24
- 25-34
- 35-44
- 45-54
- 55-64
- 65 and over

Male/female *Question type: Choice – One Answer*

Where do you live? *Question type: Choice – One Answer*

- British Columbia
- Alberta
- Washington
- Other Canadian province
- United States

How would you describe the community you live in? *Question type: Choice – One Answer*

- Urban/City
- Suburban
- Small Town
- Rural

What was your household income in the last year? *Question type: Choice – One Answer*

- Urban/City
- Suburban
- Small Town
- Rural

In which licence years (April to March) did you buy a B.C. Provincial FRESHWATER Fishing Licence? *Question type: Multiple Answers*

- 2005/06
- 2004/05
- 2003/04
- 2002/03
- 2001/02
- None of the above

In which licence years (April to March) did you buy a FEDERAL TIDAL Fishing Licence? *Question type: Multiple Answers*

- 2005/06
- 2004/05
- 2003/04
- 2002/03
- 2001/02
- None of the above

How many days did you fish in the last year? *Question type: Choice – One Answer*

- 0
- 1-5
- 6-10
- 11-15
- 16-20
- 21-30
- More than 30

In what waters do you usually fish? *Question type: Rating scale, 4 point scale, never to always.*

- Tidal/saltwater
- Freshwater lakes
- Freshwater streams and rivers

Please rank the following reasons why you fish. *Question type: Rating scale, 5 point scale, not important to extremely important.*

- Relaxation
- Companionship
- Family togetherness
- To be close to nature
- To get away
- Fish to eat
- For the challenge
- To catch large fish
- To catch many fish

To what extent do you engage in the following activities during fishing trips? *Question type: Rating scale, 4 point scale, never to always.*

- Camping
- Day hiking
- Backpacking
- Nature/bird watching

What other activities do you engage in while on fishing trips? *Question type: Open ended*

Where do you buy your fishing gear/tackle? *Question type: Rating scale, 4 point scale, never to always.*

- Specialty fishing/tackle store
- Discount store (e.g. Canadian Tire / Wal-Mart)
- Sporting goods store
- On-line Internet retailer
- Mail-order catalogue

Approximately how much do you spend annually on equipment and supplies for the following activities (not including vehicles and boats)? *Question type: Matrix, single choice per category, $0, $1-100, $101-250, $251-500, $501-1,000, Over $1,000.*

- *Camping* equipment/supplies including: camping books, magazines, DVDs or videos; camp furniture; camp stoves and cooking equipment; sleeping bags and pads; tents.
- *Nature and Bird Watching* equipment/supplies including: bird watching books, magazines, DVDs or videos; binoculars or spotting scopes; bird feeders and bird food; birdhouse cameras.
- *Day Hiking and Backpacking* equipment/supplies including: books, magazines, DVDs or videos; backpacks; daypacks and hydration; GPS units; altimeters; compasses; maps; walking sticks and poles; water purification.
- *Outdoor apparel* including: outerwear and rainwear; headgear; hiking shoes and boots.

To what extent would you be interested in purchasing the following equipment/supplies from specialty fishing/tackle stores. *Question type: Rating scale, 4 point scale, not at all interested to very interested*

- Camping equipment
- Nature and Bird Watching equipment
- Hiking and Backpacking equipment
- Outdoor apparel

Is there other equipment of supplies not listed above that you would like to be able to purchase from specialty fishing/tackle stores? *Question type: Open ended*

To what extent would you be interested in renting the following items from specialty fishing/tackle stores. *Question type: Rating scale, 4 point scale, not at all interested to very interested*

- Aluminium boats
- Pontoon boats
- Fishing gear
- Camping gear

Are there other items not listed above that you would like to be able to rent from specialty fishing/tackle stores? *Question type: Open ended*

To what extent would you be interested in purchasing the following services through specialty fishing/tackle stores. *Question type: Rating scale, 4 point scale, not at all interested to very interested*

- Guiding and charter services
- Packaged fishing vacations
- Lodging
- Transportation services (i.e. float planes)

Are there other services not listed above that you would like to be able to purchase through specialty fishing/tackle stores? *Question type: Open ended*

To what extent would you be interested in participating in the following activities/events if they were organized by specialty fishing/tackle stores. *Question type: Rating scale, 4 point scale, not at all interested to very interested*

- Fishing buddy programs (someone to fish with)
- Fishing clinics/workshops
- Fishing derbies
- Family-oriented fishing events

Are there other activities that you would like to see specialty fishing/tackle stores organizing? *Question type: Open ended*

How interested would you be in the following services if they were offered by specialty fishing/tackle stores. *Question type: Rating scale, 4 point scale, not at all interested to very interested*

- Web site
- Customer discounts for frequent purchases
- Ability to order non-stock and specialty items
- Gift registration
- Information kiosks for product and fishing information

Are there other services not listed above that you would like to see provided by specialty fishing/tackle stores? *Question type: Open ended*

Appendix 2 – Consumer Survey e-mail

My name is Greg Lawrence. I am a graduate student working toward my (MBA) Masters of Business Administration at the University of Northern British Columbia. My Masters Project is to "Identify complementary goods and services that can be offered by retail fishing/tackle stores in B.C. to improve sales and profitability, and enhance the customer experience."

A major part of this project involves a consumer survey which will provide insight into angler demographics, motivations for fishing, other activities undertaken while fishing, shopping patterns and product/service needs.

Your participation will provide BC fishing/tackle stores with information they need to provide products and services that better match customer needs. It will also help me to graduate ☺.

This work is being undertaken in consultation with the Freshwater Fisheries Society of BC. The results of this survey will be shared with the FFSBC as part of a shared effort to enhance the sport fishing industry.

Please take 5 minutes to complete the survey by clicking on this survey link.

If you can't see the link cut and paste the following address into your web browser: http://www.zoomerang.com/recipient/survey-intro.zgi?p=WEB2254WYD59RF

Also please consider forwarding this e-mail on to your fishing clients/friends – the more responses I get the better the results of the work will be.

If you have any questions, you can e-mail me directly at greg@cfquesnel.com, or call me at 250-747-1212 (days) or 250-747-3857 (evenings).

Thanks

Greg Lawrence

Appendix 3 – Retailer Survey

Introduction

The following survey is being undertaken in consultation with the Freshwater Fisheries Society of BC. The results of the report will shared with the FFSBC as part of a shared effort to enhance the sport fishing industry.

The results of the survey will also be shared with all retailers who complete the survey. Survey results will include a profile of angler demographics, why anglers fish, and the extent to which they are interested in purchasing additional goods and services.

Only compiled results will be made public. Individual survey responses will not be published or shared.

This survey is part of a research project being undertaken by Greg Lawrence to obtain a Masters of Business Administration degree from the University of Northern British Columbia.

Individual survey responses will not be reported or distributed to anyone under any circumstances.

All respondents who complete the survey are eligible to receive a free copy of all project results including:

- Consumer survey results

- Retailer survey results

- Extensive secondary research on: consumer and retail trends, demographic and behavioral profile of anglers, angler activities, and retail product/service opportunities

- Internet-accessible bibliography of related resources

If you would like a copy of the project results please enter your e-mail address below. *Question type: Open ended*

Which of the following best describes your business? *Question type: Choice – One Answer*

- Discount store
- Sporting goods store
- Specialty fishing/tackle store
- Internet retailers
- Mail-order catalogue
- Other, Please Specify

How many locations do you operate? *Question type: Choice – One Answer*

- One
- Two
- Three
- More than three

Approximately what percentage of your sales comes from each of the following areas? *Question type: Matrix, single choice per category, None, 5%, 10%, 20%, 40%, 60%, 80%, 100%*

- Freshwater fishing equipment and supplies
- Saltwater fishing equipment and supplies
- Hunting
- Other

What major categories of goods/services are included in "other" from the question above? *Question type: Open ended*

How important do you believe the following motivation/reasons are in explaining why your customers fish? *Question type: Rating scale, 5 point scale, not important to extremely important.*

- Relaxation
- Companionship
- Family togetherness
- To be close to nature
- To get away
- Fish to eat
- For the challenge
- To catch large fish
- To catch many fish

Approximately how much of your annual sales is derived from the following goods? *Question type: Matrix, single choice per category, $1-1,000; 1,000-5,000; 5,000-10,000; 10,000-20,000; 20,000-50,000.*

- *Nature and Bird Watching* equipment/supplies including: bird watching books, magazines, DVDs or videos; binoculars or spotting scopes; bird feeders and bird food; birdhouse cameras.
- *Day Hiking and Backpacking* equipment/supplies including: books, magazines, DVDs or videos; backpacks; daypacks and hydration; GPS units; altimeters; compasses; maps; walking sticks and poles; water purification.
- *Camping* equipment/supplies including: camping books, magazines, DVDs or videos; camp furniture; camp stoves and cooking equipment; sleeping bags and pads; tents.
- *Outdoor apparel* including: outerwear and rainwear; headgear; hiking shoes and boots.

Approximately how much of your annual sales is derived from renting the following goods? *Question type: Matrix, single choice per category, $1-1,000; 1,000-5,000; 5,000-10,000; 10,000-20,000; 20,000-50,000.*

- Aluminium boats
- Pontoon boats
- Fishing gear
- Camping gear

Are there other items listed above that you rent to customers? *Question type: Open ended*

To what extent does you store provide customers with assistance with the following trip/travel services? *Question type: Matrix, single choice per category, None, Limited/informal assistance; promotion of other business' services; Organizing and packaging of services.*

- Guiding and charter services
- Packaged fishing vacations
- Lodging
- Transportation services (i.e. float planes)

Are there other trip/travel services not listed above that you provide to customers? *Question type: Open ended*

How many times per year does your store organize or promote the following activities? *Question type: Matrix, single choice per category, None, 1-5 per year; 5-10 per year; More than 10.*

- Fishing buddy programs (someone to fish with)
- Fishing clinics/workshops
- Fishing derbies
- Family-oriented events

Are there other activities that your store organizes to promote more fishing? *Question type: Open ended*

Does your store offer the following shopping/convenience services? *Question type: Matrix, single choice per category, No, Limited, Yes.*

- Web site
- Customer discounts for frequent purchases
- Ability to order non-stock and specialty items
- Gift registration
- Information kiosks for product information and fishing tips

Are there other shopping/convenience services not listed above that your store offers? *Question type: Open ended*

To what extent does your store engage in the following cooperative activities with suppliers and/or other retailers? *Question type: Matrix, single choice per category, Never; Occasionally; Often; Always.*

- Cooperative advertising with suppliers
- Cooperative advertising with other retailers
- Buying cooperatives (sharing product orders with other retailers)
- Sharing training costs with other retailers
- Sharing information and approaches with other retailers

Are there other cooperative methods that you are involved with to enhance your store's customer service and/or performance? *Question type: Open ended*

Appendix 4 – Retailer Survey Follow-Up Request #1

Top 5 Reasons not to answer Greg's Fishing Retailer Survey

1. I tried and I keep getting the same page

Please try again. All questions with an asterisk * next to them need to be answered completely. If you miss part of a question and press the SUBMIT button, the page will come back with an error message on the top showing which questions you missed. If you have any problems please call me and I will be happy to help.

2. Is this a scam or spam?

Neither. If you are unsure, here are a couple of tests. First, go to the web site for the Freshwater Fisheries Society of BC www.gofishbc.com, and look under Recent News – Participate in an Angler Survey. That is the link to the consumer survey that is also part of the project. FFSBC would not post this if it were a scam. Second, call me - scammers and spammers don't provide their home and work telephone numbers. I would be happy to talk to you about my research.

3. What's in it for me?

By participating in this survey, you will obtain access to the final report and survey results. The results of the consumer survey should be particularly interesting for you as it will provide insight into angler demographics, motivations for fishing, other activities undertaken while fishing, shopping patterns and product/service needs. The consumer survey is going great and there are already over 300 valid consumer surveys completed.

4. I don't have time to answer a survey

The whole survey should take less than 5 minutes. By comparison, I have over 200 hours invested in this project and I will be happy to share all of my results with you at no cost. You get the benefit of all of this work for 5 minutes of your time.

5. I don't want to share my business information with others

Only the "rolled-up" results will be shared. I am the only one who will ever have the individual results and I will not provide them to anyone.

Please take 5 minutes to complete the survey by clicking on the survey link below.

If you have any questions, you can e-mail me directly at greg@cfquesnel.com, or call me at 250-747-1212 (days) or 250-747-3857 (evenings).

Thanks

Greg Lawrence

Appendix 5 – Retailer Survey Follow-up Request #2

Last Chance for the BC Fishing Survey!

Time is running out. The Consumer and Retailer surveys will be closed Tuesday, March 28 at 9:00 A.M. If you want to be included, you need to complete your Retailer survey before that time.

If you received this e-mail, I have not received your Retailer Survey results. Please note that there were two surveys sent out, a Consumer Survey and a Retailer Survey. Some of you may have completed the Consumer Survey, but still need to complete the Retailer survey. Some of you may have had problems fully completing the survey. If you need help please call me.

In order to receive the full report you need to complete the Retailer Survey by clicking on the survey link at the bottom of this page.

For a preview of consumer survey results paste the following link into your Explorer address bar:

http://www.zoomerang.com/reports/public_report.zgi?ID=L22KVV5J7RTY. In addition to extensive secondary research, the full report will include the results of the retailer survey and much more detail on the consumer survey including summaries of open-ended questions and important cross-tabulations.

If you have any questions, you can e-mail me directly at greg@cfquesnel.com, or call me at 250-747-1212 (days) or 250-747-3857 (evenings).

Thanks

Greg Lawrence

Appendix 3 – Tables

Table 3 – Retail Survey: Sales by Product Category

Category	0%	5%	10%	20%	40%	60%	80%	100%	% of Sales
Freshwater Fishing	0	0	0	0	6	4	2	1	57%
Saltwater Fishing	2	4	2	4	1	0	0	0	12%
Hunting	5	3	2	1	2	0	0	0	10%
Other	2	2	2	3	3	1	0	0	21%
									100%

Table 4 - Retail Survey: Sales from Complementary Goods

	$0-1000	$1,000-5,000	$5,000-10,000	$10,000-20,000	$20,000-50,000	More than $50,000	Total
Count							
Camping	5	6	2	0	0	0	13
Day hiking/backpacking	7	4	1	1	0	0	13
Nature/bird watching	11	1	1	0	0	0	13
Outdoor Apparel	2	5	5	1	0	0	13
Percentages							
Camping	38.5%	46.2%	15.4%	0.0%	0.0%	0.0%	100.0%
Day hiking/backpacking	53.8%	30.8%	7.7%	7.7%	0.0%	0.0%	100.0%
Nature/bird watching	84.6%	7.7%	7.7%	0.0%	0.0%	0.0%	100.0%
Outdoor Apparel	15.4%	38.5%	38.5%	7.7%	0.0%	0.0%	100.0%

Table 5 – Retail Survey: Sales from Rentals

	$0-1000	$1,000-5,000	$5,000-10,000	$10,000-20,000	$20,000-50,000	More than $50,000	Total
Count							
Aluminum boats	13	0	0	0	0	0	13
Pontoon boats	11	2	0	0	0	0	13
Fishing gear	11	2	0	0	0	0	13
Camping gear	13	0	0	0	0	0	13
Percentages							
Aluminum boats	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%
Pontoon boats	84.6%	15.4%	0.0%	0.0%	0.0%	0.0%	100.0%
Fishing gear	84.6%	15.4%	0.0%	0.0%	0.0%	0.0%	100.0%
Camping gear	100.0%	0.0%	0.0%	0.0%	0.0%	0.0%	100.0%

Table 6 - Retail Survey: Trip/Travel Services

Count	None	Limited-informal assistance	Promotion of other business' services	Organizing and packaging of services	Total
Guiding and charter services	1	0	7	5	13
Packaged fishing vacations	3	2	6	2	13
Lodging	2	6	5	0	13
Transportation services	7	5	1	0	13
Percentages					
Guiding and charter services	7.7%	0.0%	53.8%	38.5%	100.0%
Pakaged fishing vacations	23.1%	15.4%	46.2%	15.4%	100.0%
Lodging	15.4%	46.2%	38.5%	0.0%	100.0%
Transportation services	53.8%	38.5%	7.7%	0.0%	100.0%

Table 7 - Retail Survey: Promotion of Activities

Count	None	1-5 per year	5-10 per year	More than 10	
Fishing buddy programs	9	4	0	0	13
Fishing clinics/workshops	2	7	1	3	13
Fishing derbies	5	8	0	0	13
Family fishing events	4	8	1	0	13
Percentages					
Fishing buddy programs	69.2%	30.8%	0.0%	0.0%	100.0%
Fihing clinics/workshops	15.4%	53.8%	7.7%	23.1%	100.0%
Fishing derbies	38.5%	61.5%	0.0%	0.0%	100.0%
Family fishing events	30.8%	61.5%	7.7%	0.0%	100.0%

Table 8 - Retail Survey: Shopping/Convenience Services

Count	No	Limited	Yes	Total
Web site with store/product information	5	4	4	13
Web site with product ordering	9	1	3	13
Customer loyalty programs	6	4	3	13
Order non-stock/specialty items	0	2	11	13
Gift registration	5	5	3	13
Information kiosks	6	6	1	13
Percentages				
Web site with store/product information	38.5%	30.8%	30.8%	100.0%
Web site with product ordering	69.2%	7.7%	23.1%	100.0%
Customer loyalty programs	46.2%	30.8%	23.1%	100.0%
Order non-stock/specialty items	0.0%	15.4%	84.6%	100.0%
Gift registration	38.5%	38.5%	23.1%	100.0%
Information kiosks	46.2%	46.2%	7.7%	100.0%

Table 9 - Retail Survey: Cooperative Activities

Count	Never	Occasionally	Often	Always	Total
Cooperative advertising with suppliers	3	7	3	0	13
Cooperative advertising with other retailers	8	5	0	0	13
Buying cooperatives	6	5	0	0	11
Sharing training costs with other retailers	13	0	0	0	13
Sharing information/approaches with other retailers	3	6	4	0	13
Percentages					
Cooperative advertising with suppliers	23.1%	53.8%	23.1%	0.0%	100.0%
Cooperative advertising with other retailers	61.5%	38.5%	0.0%	0.0%	100.0%
Buying cooperatives	54.5%	45.5%	0.0%	0.0%	100.0%
Sharing training costs with other retailers	100.0%	0.0%	0.0%	0.0%	100.0%
Sharing information/approaches with other retailers	23.1%	46.2%	30.8%	0.0%	100.0%

Table 10 - Survey of Sportfishing, Consumer Survey and BC Stats: Age Groups

2006 Consumer Survey		
	#	%
Under 20	19	3.3%
20-24	24	4.2%
25-34	95	16.7%
35-44	112	19.7%
45-54	176	30.9%
55-64	111	19.5%
65 and over	32	5.6%
	569	**100.0%**

2006 Survey Grouped		
	#	%
0-34	138	24.3%
35-44	112	19.7%
45-54	176	30.9%
55 and over	143	25.1%
	569	**100.0%**

2000 BC Sportfishing Survey		
	#	%
Under 20	6,234	2.6%
20-24	7,623	3.2%
25-34	30,017	12.7%
35-44	57,283	24.2%
45-54	61,337	25.9%
55-64	43,109	18.2%
65 and over	31,151	13.2%
	236,754	**100.0%**

2000 Survey Grouped		
	#	%
0-34	43,874	18.5%
35-44	57,283	24.2%
45-54	61,337	25.9%
55 and over	74,260	31.4%
	236,754	**100.0%**

2005 BC Stats		
	#	%
Under 20	1008013	25.0%
20-24	263455	6.5%
25-34	577876	14.3%
35-44	693307	17.2%
45-54	594020	14.7%
55-64	373949	9.3%
65 and over	528578	13.1%
	4039198	**100.0%**

BC Stats Grouped		
	#	%
0-34	1849344	45.8%
35-44	693307	17.2%
45-54	594020	14.7%
55 and over	902527	22.3%
	4039198	**100.0%**

Table 11 - Consumer Survey: Respondents by Sex

	#	2006	#	2000
Male	**496**	87.2%	184,143	78.1%
Female	**73**	12.8%	51,551	21.9%
	569	100.0%	235,694	100.0%

Table 12 - Consumer Survey - Days Fished by Sex

	Count				Percentage	
	Male	Female	Total		Male	Female
0	10	11	21		2%	15%
1-5	39	18	57		8%	25%
6-10	46	12	58		9%	16%
11-15	36	8	44		7%	11%
16-20	45	7	52		9%	10%
21-30	64	3	67		13%	4%
More than 30	256	14	270		52%	19%
	496	**73**	**569**			

Table 13 – Consumer Survey: Respondents by Province/State

	#	2006	#	2000
BC	485	85.2%	235,694	77%
Alberta	42	7.4%	24,026	8%
Washington	14	2.5%	18,461	6%
Other	28	4.9%	29,116	9%
	569	**100.0%**	**307,297**	**100.0%**

Table 14 - Consumer Survey: Respondents by Type of Community

	#	%
Urban/City	213	37.4%
Suburban	95	16.7%
Small Town	188	33.0%
Rural	73	12.8%
	569	**100.0%**

Table 15 - BC Survey of Sportfishing and Consumer Survey: Income Grouping

	#	2006	2000
Less than $20,000	20	3.5%	6.4%
$20,000 to 40,000	62	10.9%	15.6%
$40,000 to 60,000	107	18.8%	18.2%
$60,000 to 80,000	98	17.2%	14.6%
More than $80,000	196	34.4%	18.3%
Don't know/no answer	86	15.1%	26.9%
	569	**100.0%**	**100.0%**

Table 16 – Consumer Survey: Days Fished in 2005

	#	2006	2000
0	**21**	3.7%	-
1-5	**57**	10.0%	171
6-10	**58**	10.2%	464
11-15	**44**	7.7%	572
16-20	**52**	9.1%	936
21-30	**67**	11.8%	1,709
More than 30	**270**	47.5%	8,100
	569	100.0%	11,952

Table 17 – Consumer Survey: Where Anglers Shop

	1	2	3	4		
	Never	Sometimes	Often	Always	Total	Avg
Specialty	17	148	294	110	569	1.87
Discount store	178	300	81	10	569	0.86
Sporting Goods	103	288	152	26	569	1.18
Internet	387	163	15	4	569	0.36
Mail-order	376	174	15	4	569	0.38

Table 18 – Consumer Survey: Angler Motivation for Fishing

Consumer	1	2	3	4	5	Total	Avg
Relaxation	9	12	79	196	273	569	4.25
Companionship	76	90	171	165	67	569	3.10
Family together	125	106	126	124	88	569	2.90
Close to nature	10	15	92	194	258	569	4.19
To get away	9	23	68	198	271	569	4.23
Fish to eat	244	131	104	55	35	569	2.13
The challenge	47	59	101	197	165	569	3.66
Large fish	104	105	165	122	73	569	2.92
Many fish	149	140	184	65	31	569	2.45

Consumer Grouped							
Social/relaxation	229	246	536	877	957		3.73
Fish to eat	244	131	104	55	35		2.13
Challenge/competition	300	304	450	384	269		3.01

Table 19 – Retail Survey: Understanding of Angler Motivation for Fishing

Retailer	1	2	3	4	5	Total	Avg
Relaxation	0	0	1	8	4	13	4.23
Companionship	0	4	4	4	1	13	3.15
Family together	0	2	5	5	1	13	3.38
Close to nature	0	3	2	5	3	13	3.62
To get away	0	0	1	7	5	13	4.31
Fish to eat	2	5	3	2	1	13	2.62
The challenge	0	0	1	9	3	13	4.15
Large fish	0	3	4	5	1	13	3.31
Many fish	1	6	5	1	0	13	2.46
Retailer Grouped							
Social/relaxation	0	9	13	29	14		3.74
Fish to eat	2	5	3	2	1		2.62
Challenge/competition	1	9	10	15	4		3.31

Table 20 – Consumer Survey: Angler Motivation by Store Shopped

	Social/relaxation Weighted average	Fish to eat Weighted average	Challenge/competition Weighted average
Specialty fishing/tackle store			
Never	3.87	1.59	1.35
Sometimes	3.97	2.14	2.65
Mostly	3.89	1.70	3.16
Always	4.28	1.45	3.27
Discount store			
Never	3.99	1.36	2.96
Sometimes	3.96	1.91	3.13
Mostly	4.02	2.09	2.71
Always	4.42	2.10	1.93
Sporting goods store			
Never	3.91	1.65	2.99
Sometimes	3.96	1.68	2.95
Mostly	3.98	1.95	3.01
Always	4.66	2.00	3.41
On-line Internet retailer			
Never	4.01	1.93	2.95
Sometimes	3.96	1.45	3.11
Mostly	3.63	0.87	2.82
Always	4.55	1.75	3.08
Mail-order catalogue			
Never	3.99	1.89	2.98
Sometimes	3.98	1.48	2.99
Mostly	3.85	2.13	3.47
Always	4.35	1.25	2.92

Table 21 – Consumer Survey: Days Fished by Store Shopped

	0	1-5	6-10	11-15	16-20	21-30	> 30
Specialty fishing	1.1	1.5	1.7	1.8	1.9	1.9	2.0
Discount store	0.8	1.1	1.0	0.8	0.9	0.9	0.7
Sporting goods	1.0	1.2	1.3	1.2	1.3	1.2	1.1
Internet retailer	0.2	0.1	0.2	0.4	0.3	0.5	0.5
Mail-order	0.1	0.2	0.3	0.5	0.4	0.6	0.5

Table 22 – Consumer Survey – Other Activities Engaged in While Fishing

Count	0	1	2	3		Avg	% often or always
	Never	Sometimes	Often	Always			
Camping	55	220	233	61	569	1.53	
Day hiking	126	294	119	30	569	1.09	
Backpacking	264	260	39	6	569	0.63	
Nature/bird watching	120	198	160	91	569	1.39	
Percentage							
Camping	9.7%	38.7%	40.9%	10.7%			51.7%
Day hiking	22.1%	51.7%	20.9%	5.3%			26.2%
Backpacking	46.4%	45.7%	6.9%	1.1%			7.9%
Nature/bird watching	21.1%	34.8%	28.1%	16.0%			44.1%

Table 23 - Consumer Survey: Annual Expenditures on Complementary Activities

	$0	$1-100	$101-250	$251-500	$501-1000	Over $1,000	% over $250	% over $1,000
Camping	45	173	155	119	39	38		
Nature and Bird Watching	286	210	49	12	7	5		
Day Hiking and Backpacking	145	248	115	42	16	3		
Outdoor Apparel	11	97	220	157	64	20		
Percentages								
Camping	7.9%	30.4%	27.2%	20.9%	6.9%	6.7%	34.4%	11.6%
Nature and Bird Watching	50.3%	36.9%	8.6%	2.1%	1.2%	0.9%	4.2%	4.9%
Day Hiking and Backpacking	25.5%	43.6%	20.2%	7.4%	2.8%	0.5%	10.7%	4.0%
Outdoor Apparel	1.9%	17.0%	38.7%	27.6%	11.2%	3.5%	42.4%	3.5%

Table 24 – Consumer Survey: Interest in Complementary Goods and Services

	Not at all interested	Somewhat interested	Interested	Very interested	Total	Avg	% Int/Very Interested
Count	0	1	2	3			
Camping	140	243	160	26	569	1.13	
Nature and Bird Watching	331	183	45	10	569	0.53	
Day Hiking and Backpacking	191	261	101	16	569	0.90	
Outdoor Apparel	54	199	239	77	569	1.60	
Percentages							
Camping	24.6%	42.7%	28.1%	4.6%	100%		32.7%
Nature and Bird Watching	58.2%	32.2%	7.9%	1.8%	100%		9.7%
Day Hiking and Backpacking	33.6%	45.9%	17.8%	2.8%	100%		20.6%
Outdoor Apparel	9.5%	35.0%	42.0%	13.5%	100%		55.5%

Table 25 – Consumer Survey: Interest in Rental Items

	Not at all interested	Somewhat interested	Interested	Very interested	Total	Avg	% Int/Very Interested
Count	0	1	2	3			
Aluminum boats	305	131	99	34	569	0.76	
Pontoon Boats	231	165	120	53	569	0.99	
Fishing Gear	360	115	59	35	569	0.59	
Camping Gear	414	113	30	12	569	0.37	
Percentages							
Aluminum boats	53.6%	23.0%	17.4%	6.0%	100%		23.4%
Pontoon Boats	40.6%	29.0%	21.1%	9.3%	100%		30.4%
Fishing Gear	63.3%	20.2%	10.4%	6.2%	100%		16.5%
Camping Gear	72.8%	19.9%	5.3%	2.1%	100%		7.4%

Table 26 – Consumer Survey: Interest in Complementary Services

	Not at all interested	Somewhat interested	Interested	Very interested	Total	Avg	% Int/Very Interested
Count	0	1	2	3			
Guiding and Charter Services	158	222	152	37	569	1.12	
Packaged Fishing Vacations	189	216	137	27	569	1.00	
Lodging	199	223	121	26	569	0.95	
Transportation Services	211	223	112	23	569	0.91	
Percentages							
Guiding and Charter Services	27.8%	39.0%	26.7%	6.5%	100%		33.2%
Packaged Fishing Vacations	33.2%	38.0%	24.1%	4.7%	100%		28.8%
Lodging	35.0%	39.2%	21.3%	4.6%	100%		25.8%
Transportation Services	37.1%	39.2%	19.7%	4.0%	100%		23.7%

Table 27 – Consumer Survey: Interest in Activities/Events

	Not at all interested	Somewhat interested	Interested	Very interested	Total	Avg	% Int/Very Interested
Count	0	1	2	3			
Fishing Buddy Programs	286	178	75	30	569	0.73	
Fishing Clinics/workshops	95	186	201	87	569	1.49	
Fishing Derbies	245	143	126	55	569	0.98	
Family Fishing Events	209	193	131	36	569	0.99	
Percentages							
Fishing Buddy Programs	50.3%	31.3%	13.2%	5.3%	100%		18.5%
Fishing Clinics/workshops	16.7%	32.7%	35.3%	15.3%	100%		50.6%
Fishing Derbies	43.1%	25.1%	22.1%	9.7%	100%		31.8%
Family Fishing Events	36.7%	33.9%	23.0%	6.3%	100%		29.3%

Table 28 – Consumer Survey: Interest in Shopping/Convenience Services

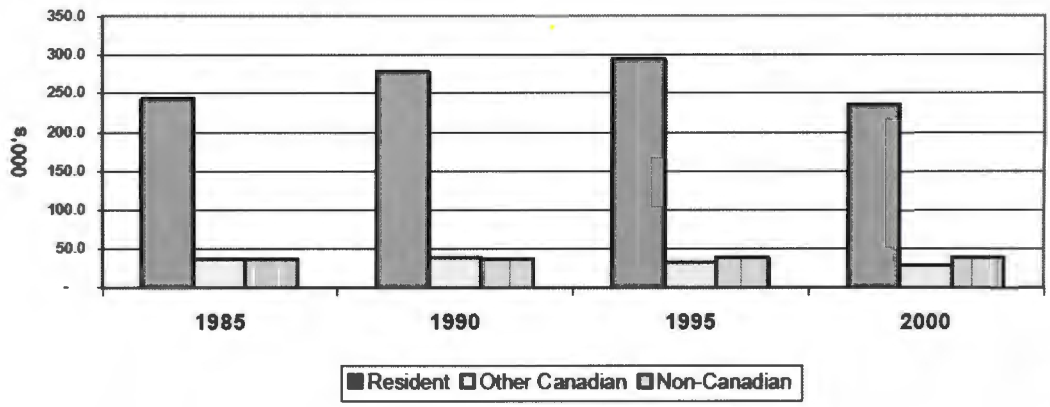
	Not at all interested	Somewhat interested	Interested	Very interested	Total	Avg	% Int/Very Interested
Count	0	1	2	3			
Web Site	55	151	226	137	569	1.78	
Loyalty programs	40	109	211	209	569	2.04	
Order Non-stock/specialty	61	150	218	140	569	1.77	
Gift Registration	225	190	110	44	569	0.95	
Information Kiosks	94	201	213	61	569	1.42	
Percentages							
Web Site	9.7%	26.5%	39.7%	24.1%	100.0%		63.8%
Loyalty programs	7.0%	19.2%	37.1%	36.7%	100.0%		73.8%
Order Non-stock/specialty	10.7%	26.4%	38.3%	24.6%	100.0%		62.9%
Gift Registration	39.5%	33.4%	19.3%	7.7%	100.0%		27.1%
Information Kiosks	16.5%	35.3%	37.4%	10.7%	100.0%		48.2%

Appendix 4 – Figures

Figure 26 - Rating the BC Fishing Experience

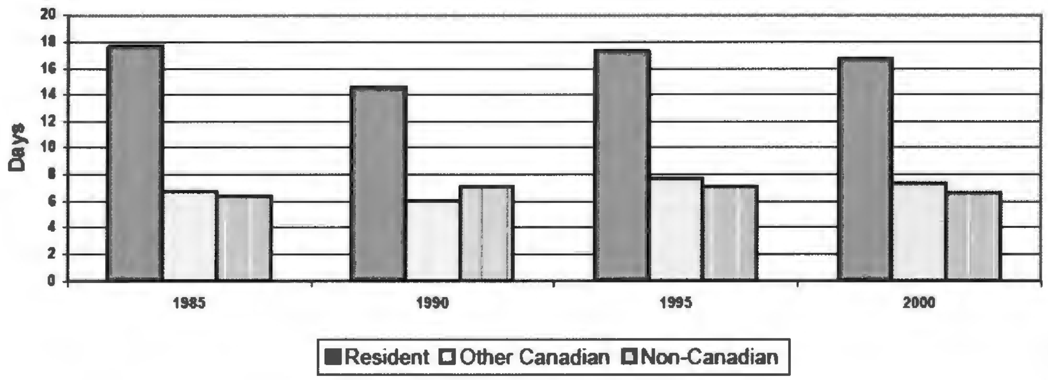
Rating	B.C. Resident	Other Canadian	Non-Canadian	Total
No response	4,180	2,076	3,173	9,429
	-	-	-	-
Excellent	30,873	6,241	12,434	49,548
%	13.3	23.3	34.6	16.8
Very good	45,572	4,731	9,969	60,272
%	19.7	17.6	27.7	20.5
Good	78,042	8,445	7,372	93,859
%	33.7	31.5	20.5	31.9
Fair	47,866	4,196	3,910	55,972
%	20.7	15.6	10.9	19.0
Poor	29,158	3,220	2,268	34,646
%	12.6	12.0	6.3	11.8
Total	235,691	28,909	39,126	303,726 [27]

Figure 27 - Number of Active Anglers in BC



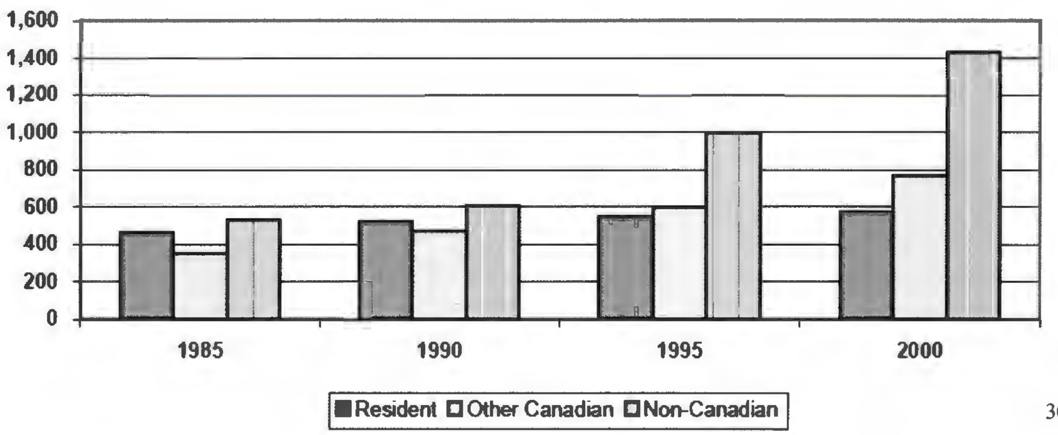
28

Figure 28 - Average Days Fished by Anglers in BC 1985-2000



29

Figure 29 - Average Direct Expenses per Angler in BC 1985-2000



30

Figure 30 - Angler's Reasons for not Fishing More

	Resident	Other Canadian	Non-Canadian	Total
Not enough spare time	215,986	25,397	25,948	267,331
%	83.8	88.9	83.4	84.2
Poor catch rate	62,724	4,447	4,910	72,081
%	24.3	15.6	15.8	22.7
Fishing spots too crowded	43,165	694	548	44,408
%	16.7	2.4	1.8	14.0
Restrictive regulations	32,512	3,700	1,864	38,076
%	12.6	12.9	6.0	12.0
Fish too small	31,596	1,305	1,560	34,461
%	12.3	4.6	5.0	10.9
Other factors	25,982	3,635	4,835	34,451
%	10.1	12.7	15.5	10.9
Total	**257,806**	**28,580**	**31,127**	**317,513**

31

Figure 31 - Top Items Researched/Purchased Online

32

Figure 32 - Barriers to E-Commerce Adoption for Small Firms

Goods and services do not lend themselves to Internet transactions	44
Prefer to maintain current business model	36
Security concerns	17
Development and maintenance costs too high	13
Lack of skilled employees	11

Customers not ready	9
Uncertain about the benefits	8
Concerns about competitors analyzing company	7
Internet availability is too slow	5
Suppliers not ready	4[33]

Figure 33 - Angler's Motivation for Fishing

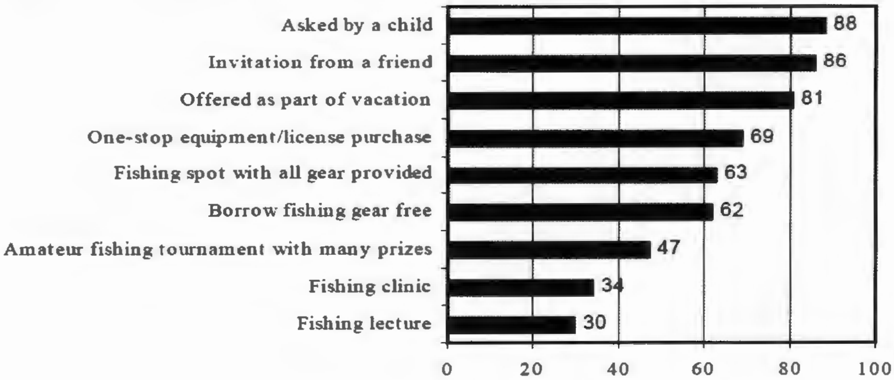
Reason	B.C. Resident	Other Canadian	Non-Canadian	Total
Fish to eat	2.30	2.20	1.96	2.25
Relaxation	**3.99**	3.91	**4.13**	4.00
Companionship	2.70	2.83	3.00	2.75
Nature	3.97	**4.21**	**4.13**	**4.02**
Challenge	2.85	3.44	3.54	2.99
Improve fishing skills	1.95	2.38	2.21	2.02
To get away	3.51	3.54	3.59	3.52
Family togetherness	2.95	2.71	2.55	2.88
To catch large fish	2.07	2.44	2.82	2.20
To catch many fish	1.64	1.94	2.41	1.77

[34]

Figure 34 - Reasons Anglers Fish - U.S.

Motivation	1999	1980
Relaxation	35%	14%
Friends and family	33%	19%
Close to nature	13%	8%
Large fish	3%	9%
For the sport	7%	20%
To catch food	5%	28%

Figure 35 – Situations that Would Encourage an Angler to go Fishing



[35]

Figure 36 - Trends in Participation for Selected Outdoor Activities

	Percent growth 1982/83 to 2000/01	Millions of participants in 2000/01
Bird watching	231	73
Hiking	194	76
Backpacking	182	25
Snow-mobiling	125	14
Primitive camping	111	38
Off-road driving	110	42
Walking	91	191
Developed camping	86	62
Downhill skiing	73	21
Swimming, river/lake/ocean	66	98
Motor boating	62	57
Bicycling	53	93
Cross-country skiing	50	9
Sightseeing	37	118
Picnicking	37	124
Horse riding	37	23
Driving for pleasure	30	117
Outdoor team sports	25	56
Fishing	24	80
Hunting	21	27
Water skiing	19	20
Sailing	10	12[36]

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