

2019 ECONOMIC AND SOCIAL IMPACT OF **MANITOBA'S HUNTING AND FISHING INDUSTRY**

SUMMARY OF FINDINGS

Manitoba
CANADA'S HEART  BEATS

**HUNT
FISH
MB**




OVERVIEW

In 2019, about 245,000 hunters and anglers spent nearly \$480 million in Manitoba — everything from luxury northern lodge stays to containers of frozen minnow at the Lac du Bonnet Co-op. That doesn't include big ticket items like boats and ATVs, and it doesn't include the spending of lodges, outfitters and guides as part of their business, all of which add even more to Manitoba's economy and government tax revenue.

Manitoba's hunting and fishing industry has many strengths, including easy access to a huge diversity of unique experiences, well-established operators with loyal clients and a culture of ethical and sustainable practises. American hunters and anglers are particularly impressed with Manitoba and use words like exceptional, awesome and amazing to describe their hunting and fishing experiences. However, the survey of more than 2,100 hunters, anglers and outfitters also uncovered some worries for the future, particularly the need to invest in sound fish and wildlife management practises and better infrastructure so the province's outstanding experiences can last and grow.

INTRODUCTION

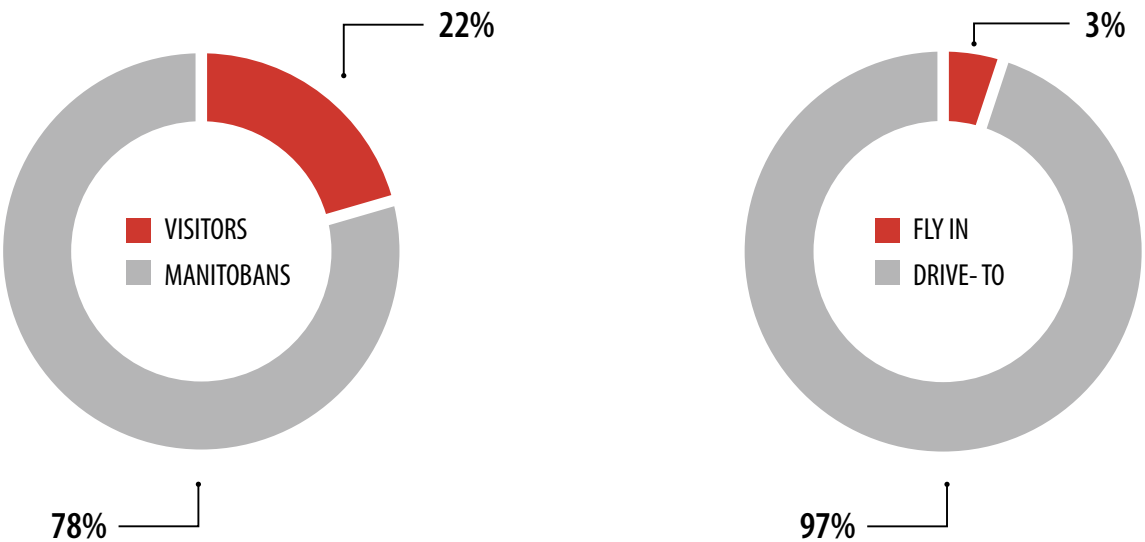
In 2020, Travel Manitoba commissioned Probe Research Inc. to study the economic and social impacts of Manitoba's recreational hunting and fishing industry, both outfitted and non-outfitted. Probe Research conducted a detailed spending and attitudinal survey of outfitters, anglers and hunters. Key survey results are comparable to a similar study completed in 2010. In addition, several engagement sessions and in-depth interviews were completed with outfitters, lodge owners and industry leaders to understand the industry's strengths, weaknesses, opportunities and threats to provide context to the hard data. The result is a comprehensive snap-shot of the industry in 2019, including success areas and impediments to future growth.

TOTAL INDUSTRY WIDE ECONOMIC IMPACT

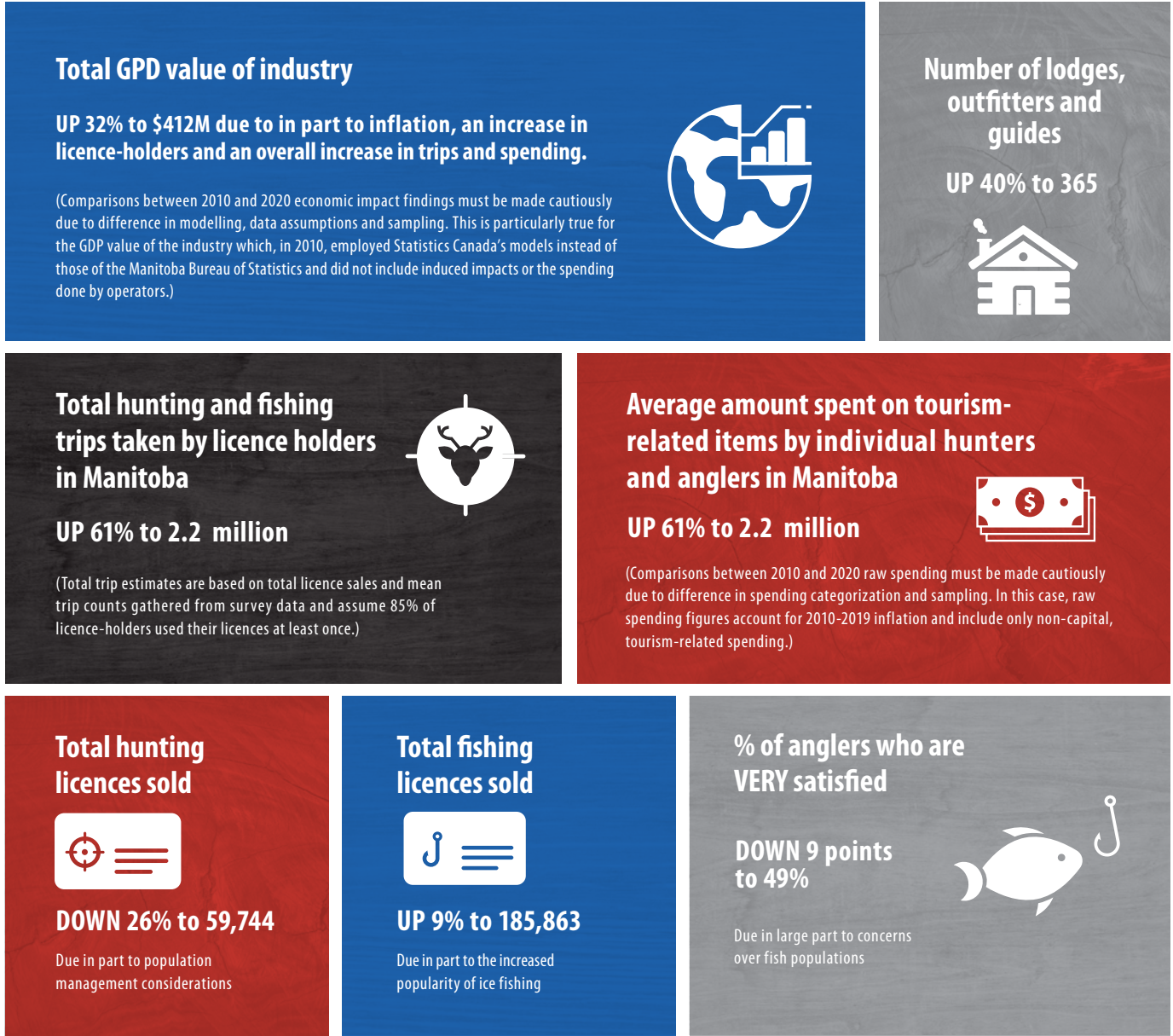
	ANGLING	HUNTING	TOTAL
Total Hunter and Angler Spending¹ (excludes capital spending, but includes trip-related spending on fuel, accommodation, meals, etc.)	\$268M	\$212M	\$480M
Employment (person-years, direct, indirect and induced)	2,992	2,519	5,512
Total Provincial Taxes Collected (income tax, PST)	\$56M	\$40M	\$96M
GDP impact at market prices	\$216M	\$196M	\$412M
Total Direct Spending (including substantial outlays for capital item such as vehicles and boats)	\$601M	\$428M	\$1,029M

BREAKDOWN OF HUNTER AND ANGLER SPENDING¹

In 2019, 78% of hunting and fishing expenditures in the province were made by Manitobans. Drive-to hunting and fishing experiences dominated, representing 97% of expenditures.



2010-2019: WHAT'S CHANGED? SECTOR HAS GROWN BUT VISITOR SATISFACTION HAS DECLINED



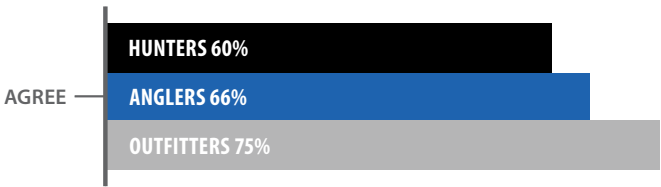
¹ The methodology used in The 2019 Economic and Social Impacts of Manitoba's Hunting and Fishing Industry differs from Statistics Canada visitor spending data used in past Travel Manitoba publications including annual reports and the Provincial Tourism Strategy. The two datasets cannot be directly compared as a result.

WHAT'S NEEDED: BETTER RESOURCE MANAGEMENT, INFRASTRUCTURE IMPROVEMENTS

SATISFACTION WITH 2019 EXPERIENCE IN MANITOBA

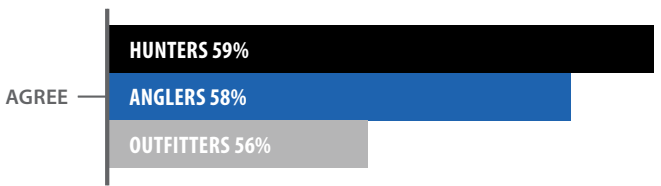


MANITOBA OFFERS WORLD-CLASS HUNTING AND FISHING EXPERIENCES



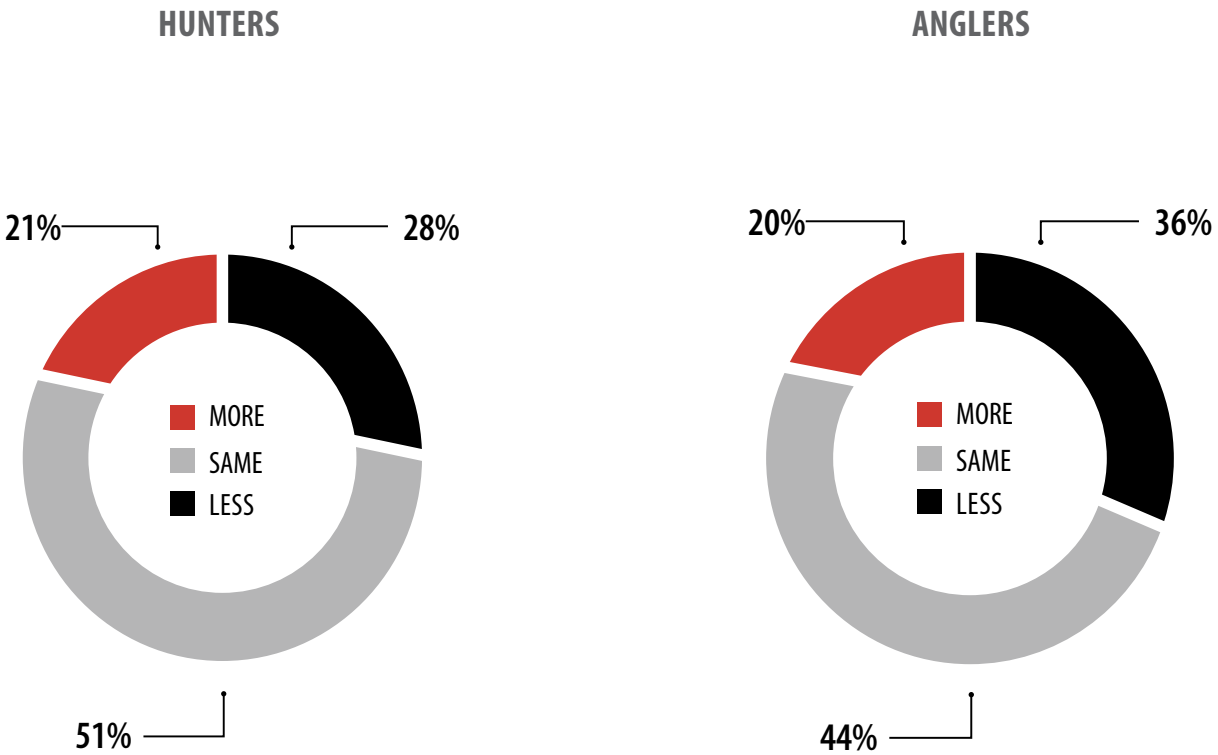
"[Manitoba needs] better management of wildlife through conservation efforts and more enforcing of the rules and regulations...I fear that my kids will not grow up to enjoy hunting or even be able to experience the hunting and outdoor activities that I once did since we are not planning for the future and putting in our efforts as a whole to help sustain our wildlife." — *Manitoba hunter*

CONCERN ABOUT THE SUSTAINABILITY OF MANITOBA'S FISH AND WILDLIFE POPULATIONS



"I would love to see more stocking programs, better aeration on lakes that get winter kill, more fish cleaning huts, bathroom facilities at lakes, plowing access onto lakes in winter, more conservation officers enforcing laws and better wash stations with more employees and longer hours to help stop aquatic invasive species!" — *Manitoba angler*

ARE YOU HUNTING AND FISHING MORE NOW IN MANITOBA THAN FIVE YEARS AGO?



Among anglers who say they're fishing less, 21% say it's because of a decline in fish stocks. Hunters and anglers pointed to some practical barriers to more hunting and fishing in Manitoba. Nearly six-in-ten said more highways in better condition would make them more likely to take more trips, and 40% said improved rural and remote Internet access would make them more likely to hunt and fish. Anglers in particular called for improvements to simple, small-scale infrastructure.

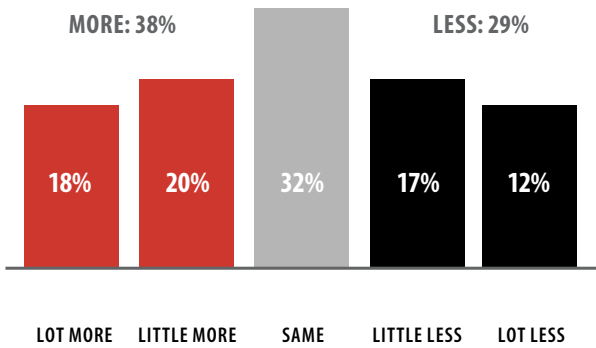
“Travel Manitoba has made a significant investment in marketing Manitoba’s world-class ice fishing experiences to anglers locally and further afield. The resulting increase in off-season business has contributed significantly to the economic viability of the sector.”

— **Colin Ferguson**, *President & CEO, Travel Manitoba*

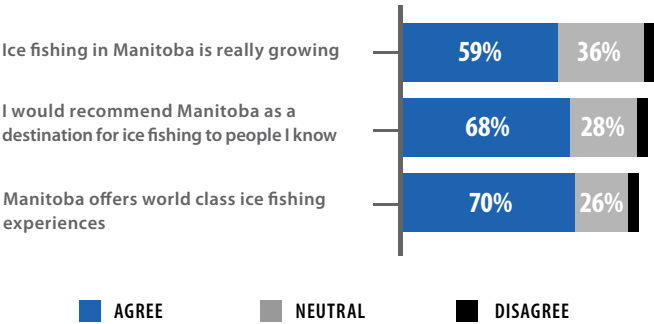
ICE FISHING A KEY DRIVER OF ECONOMIC GROWTH

- Anglers are ice fishing more in Manitoba now than they were five years ago. A larger cohort of younger adults (18–34) report fishing more now compared with older anglers who are generally fishing less.
- Ice anglers are resolute in their wish for better ice access as a key enticement to increase participation. Nearly three-quarters say more near-ice parking, better plowing and other infrastructure improvements would make them more likely to fish more in winter. Better highways in better winter condition would also be a significant enticement for more than one-half of ice anglers.
- Non-Manitoba ice anglers — those from the U.S. and nearby provinces — are more than twice as likely to say better accommodation near ice fishing hotspots would spur more trips.

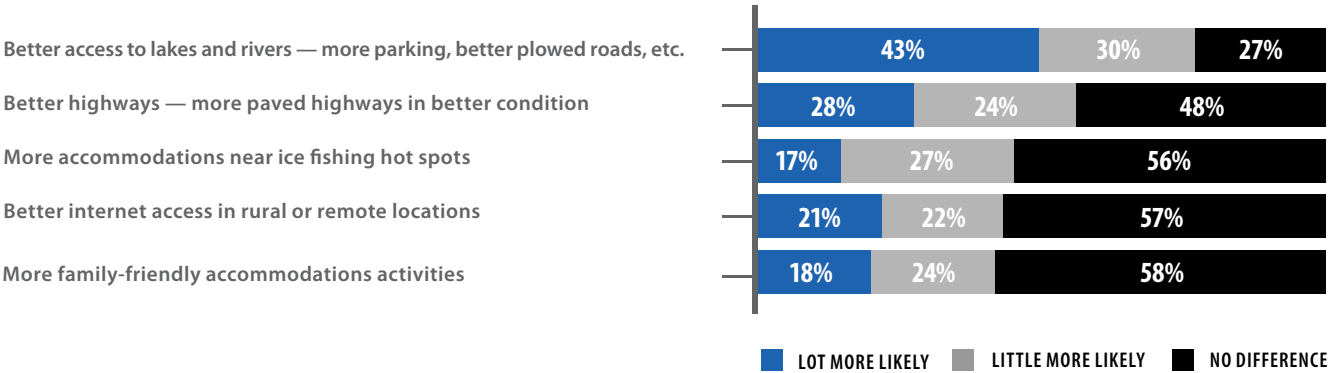
ARE YOU ICE FISHING MORE OR LESS OR THE SAME AMOUNT COMPARED TO FIVE YEAR AGO?



PLEASE INDICATE HOW MUCH YOU AGREE OR DISAGREE WITH FOLLOWING STATEMENTS

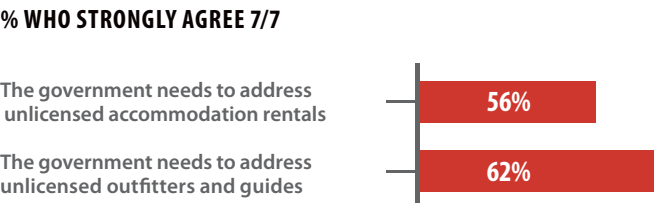


PLEASE READ THE FOLLOWING LIST AND INDICATE IF THIS OPTION WOULD MAKE YOU MORE LIKELY TO ICE FISH



OUTFITTER GROWTH: OPPORTUNITIES AND CHALLENGES

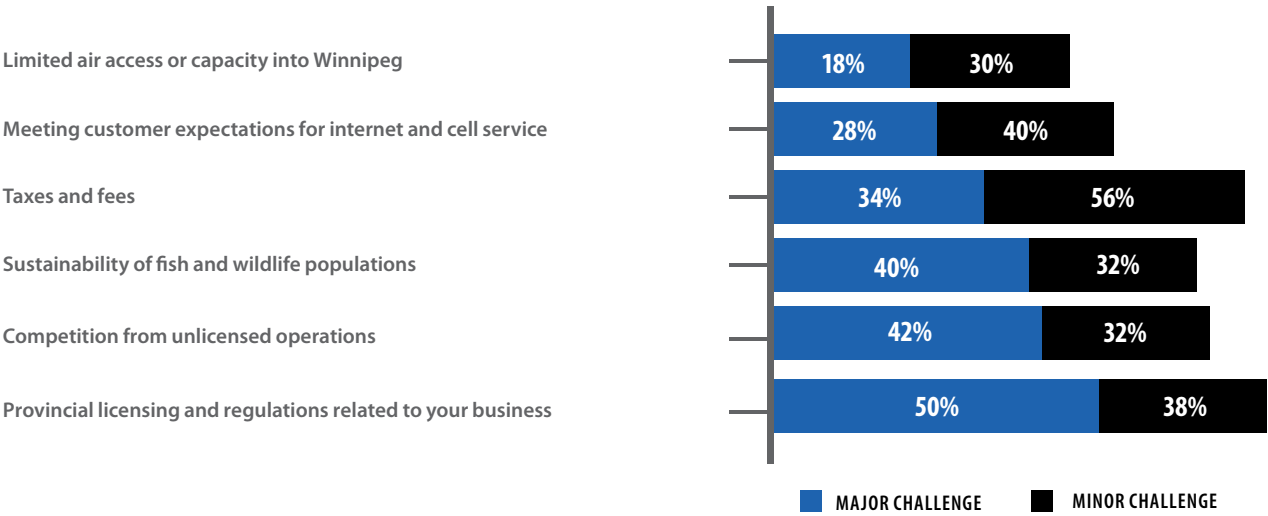
- More than one-half of outfitters strongly favour addressing unlicensed accommodations and operators, and 42 per cent cited these operators as a major business challenge. This was also a key theme in qualitative and SWOT findings.



- Concern about the wildlife management and the sustainability of fish and wildlife populations was voiced by all groups surveyed. Nearly half of anglers, hunters and outfitters who surveyed strongly agreed that the Manitoba government needs to better manage the fish/wildlife resource. Of particular concern to the tourism industry is that an even higher percentage (51%) of American anglers surveyed strongly agreed with the statement.

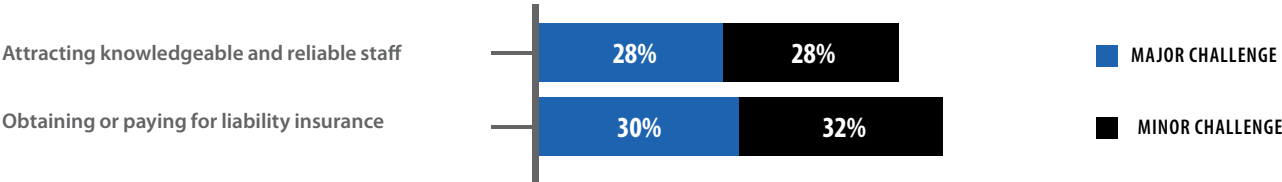


PROVINCIAL REGULATIONS ARE TOP EXTERNAL BUSINESS CHALLENGE



- Mirroring findings from interviews with industry leaders, nine-in-ten operators considered provincial taxes and fees as well as licensing and regulations a business challenge. In verbatim responses, these frustrations ran the gamut from a shortage of particular species tags to concern over e-licensing roll-out to a general lack of regulatory accommodation for the unique circumstances of lodge owners (e.g. drinking and wastewater regulations).

INSURANCE, STAFFING ARE TOP INTERNAL BUSINESS CHALLENGES



- Among the key internal business challenges are securing and affording liability insurance and staff recruitment and retention. Though somewhat less intense, nearly two-thirds of operators said difficulty knowing where to target marketing dollars is also a challenge. This was also identified as a key challenge a decade ago. Other business development challenges such as product development and internal cash flow management were less prevalent, suggesting a degree of growing sophistication among operators, especially larger ones.
- Growth expectations before the pandemic were bullish. More than half of operators planned to expand their business over the next five years, primarily by growing the customers for their existing lodge capacity and product offerings.

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