

# VISION 2021



Sport Fishing Advisory Board

A strategic 10-point framework to grow Canada's recreational fishing sector on the Pacific coast.



# INTRODUCTION



This document captures discussions, interviews, and informal conversations with representatives of recreational fishing sector associations, watershed groups, tourism industry operators, individual anglers, and public and private sector experts. The document articulates specific strategies to maximize the social and economic potential of the recreational fishery on Canada's Pacific coast. Accordingly, federal and provincial governments, private interests, Indigenous communities and non-governmental organizations are called upon to come together in partnerships and enjoy the benefits of an invigorated sector.



# BACKGROUND



According to the latest available data, from 2010, Canada’s recreational fishery sector contributes \$8.3 billion annually to local economies. Indications are that for 2018-19 this amount is likely much higher.

On the Pacific coast, a 2012 report prepared by the Government of British Columbia noted that the tidal waters recreational fishery produced \$936 million in annual sales, created more than 8,400 jobs, and nearly 4,000 person-years of employment. When combined the tidal and freshwater recreational fisheries accounted for 43% of all the fisheries revenues in the British Columbia. This, when coupled with the fact that recreational angling removes only 15% of the halibut and 10% of the salmon, suggests that in strictly economic terms the Pacific coast recreational fishery is indeed extremely productive.

However, despite these statistics, there is little evidence of a well-coordinated, vision-oriented framework for action to further develop this sector and accrue the social and economic benefits it offers. In 2014, the Sport Fishing Advisory Board, which advises Fisheries and Oceans Canada, produced a document titled, “Recreational Fisheries Vision Implementation Strategy.” This strategy proposed to realize the “Vision for Recreational Fisheries in British Columbia,” which was developed several years earlier and was endorsed by the Province of British Columbia and Fisheries and Oceans Canada. These earlier documents successfully profiled the contributions of the recreational fishery sector, and mobilized attention and resources towards actionable items such as catch-reporting.



Vision 2021 now proposes to move the yardsticks significantly forward. It outlines a holistic and multipronged strategy, which if adequately resourced will anchor the Pacific coast recreational fishery sector as the central spoke which tethers: tourism, especially from burgeoning source countries such as China; the domestic social programming and environmental agenda; and tighter integration with First Nations and other Indigenous groups.

Vision 2021 is a positive call to action: for the recreational sector, for governments, and for nonprofit groups to mobilize their resources



# ANALYSIS



On May 25, 2018, a workshop was held in Vancouver with experts including executive members of the Sport Fishing Advisory Board, and its associated organizations such as the Sport Fishing Institute of British Columbia, the British Columbia Wildlife Federation, and the West Coast Fishing Guides Association.

This workshop was facilitated by Fisheries and Oceans Canada. Its aim was twofold: to take stock of the current status of the recreational fishery sector by assessing its strengths and areas of concern; and to outline a strategy to develop and enhance the sector by charting a new forward direction. The following describes the summary of the stock-taking portion of the workshop:

- **Profile of the sector:**

There is shared consensus that the recreational fishing sector does not enjoy the same level of appreciation for its value proposition as other similar sectors, such as ecotourism and commercial fishing. This is true with respect to policy makers and the public at large. The areas of concern highlighted during the workshop discussions were the absence of public appreciation of conservation and sustainable access-minded approach the sector has consistently embodied; and its extraordinarily high levels of economic productivity. It was felt therefore that the sector needs to better publicize its metrics, market itself in a whole-of-government style of advocacy, and engage the broader public on its conservation and sustainability storyline. It was also felt that the sector must strengthen relationships with the Indigenous communities and seek out joint opportunities to promote areas of common cause.



- **Infrastructure investments:**

Defining infrastructure in its broadest sense, workshop participants felt that the sector needs significant investments, both capital oriented and otherwise. This would include: marketing of tourism linked to recreational fishing, improvements to docks, more efficient transportation routes to remote communities that may service lodges or host visiting recreational fishers, business partnerships with Indigenous entrepreneurs, development of Indigenous-themed products and services, strategic enhancement initiatives to increase participation of youth, seniors, and new Canadians, and targeting the corporate sector as a potential new base of business opportunity. In the same vein the other area of focus for investments was the urgent need to improve the consultations process, succession planning by attracting young entrepreneurs, development of specialized advocacy groups, and a renewal of the Sport Fishing Advisory Board itself.

- **Availability of data:**

It was felt that the capture of foundational ecological and socio-economic data to describe the status, and the activity and impact of the sector is lacking. This includes data on economic activity within the sector, job creation, social and other benefits for rural communities, concerns of business entrepreneurs, and ecological data to enhance stock assessments, fishery monitoring, and evidence-based approaches for production of fish, and stock enhancements. The current federal survey of recreational fishing done every five years captures the profile of anglers, but it does not showcase the robustness of the sector. Many participants felt that more data would allow for more accurate business planning in the sector and a proactive capacity to engage with federal and other policy





# VISION 2021



The workshop discussions were extensive and highlighted a myriad of social and economic opportunities offered to Canadians by the recreational fishery. But the discussions also under-scored the stark reality that none of the plans or ideas can be brought to fruition by the recreational fishing sector alone. Namely, there must be a collaborate effort of shared objectives and mutually beneficial investments by the business community; provincial and federal governments; Indigenous governments; and other parties that could benefit from the strategic and ongoing development of the sector.

The list below outlines an action plan of 10 points that should be implemented over the course of the next few years, by 2021. The items purposefully highlight opportunities to improve existing processes; modernize policies and programs; consider investments in high priority areas; and focuses outwardly to the public at large and offers initiatives that could be undertaken via partnerships with Indigenous groups, new Canadian communities, urban youth, and could include promotional activities to showcase the value-added nature of the sector.

The explicit goal of the 10 point action plan is to update the brand of the sector as a leader in conservation, sustainable harvest, addressing climate change, and as an active and progressive voice in local communities. If implemented in earnest, the plan will position the sector in the forefront of Canada's burgeoning tourism sector by profiling its value to policy makers, showcasing its innovations in goods and services provided to an expanded base of domestic and international consumers; and equally importantly, in light of climate change and the Indigenous reconciliation agenda, the plan will allow the recreational fishery sector to be in the vanguard of conservation and sustainable development:

## **1. Review federal consultations processes.**

Given the dynamics and the growth of the sector, it would be timely for the federal government to conduct a full review of the ways and means in which it engages with the recreational fishing sector. The current structure of the Sport Fishing Advisory Board was conceived over 50 years ago, at a time when the sector was somewhat in its infancy. It has not since been substantially examined for effectiveness or improvements, or for that matter for inclusion of other options of engagement, such as the use of technology. One of the weaknesses of the current model is that, as a federally created advisory panel, the Sport Fishing Advisory Board is unable to function as a non-governmental umbrella organization to implement its own recommendations or to advocate independently. It is also ineligible to apply for funding programs and often depends on organizations such as the Sport Fishing Institute to make these applications. One potential option is to follow the Australian model, whereby several states have transitioned their advisory bodies to evolve into traditional, advocacy-oriented, independent organizations able to develop, and implement their own recommendations.

## **2. Modernize the regulatory framework**

There is a pressing need to modernize the regulatory framework for the recreational fishing sector. The current approach is piece-meal with one-off regulatory changes dependent on the backlog of federal and provincial governments. It is proposed that all the existing complement of regulations should first be identified and reviewed collectively in the context of emerging trends and concerns of the sector and from a whole-of-government perspective. This could include tackling not just the traditional fisheries and access related issues, but open discussions on issues impacting the recreational fishery industry such as access to capital for development of products and services, linkages to the federal and regional tourism visions, transportation planning, environmental custodianship, and would explore modernization of the entire regulatory framework, rather than only addressing of du jour issues.

## **3. Create a data warehouse of the sector**

There is a significant data gap to appreciate the full picture of the recreational fishing sector. The only source of data is the “Survey of Recreational Fishing in Canada” which is conducted every five years. This survey only provides profiles of anglers, and even that is limited. The sector itself is larger than the anglers; and it is therefore critical that governments, industry associations, academic researchers and others have a full grasp of its dynamics, contributions and challenges. A newer approach could include data on job creation, trends on development of innovations within the industry, patterns of capital investments, returns on products and services, etc. This information would be useful to target specific policy changes or investments via government programs, and mobilise the attention of stakeholders and current and new social and business entrepreneurs active in the sector.



#### **4. Focus on research and innovation**

Continuing with the theme to view the robustness of the sector as a whole and not just as a group of anglers fishing for leisure, federal and provincial governments need to partner with the recreational fishing sector on multiple fronts. A full research agenda should be developed: to examine new technologies such as non-toxic marine paint, innovations in marine transportation, patterns of fish migrations to facilitate better business planning for lodges, such as bookings and marketing and sales campaigns. Moreover, the use of automation platforms should be expanded for programs such as catch-monitoring: their scope should analyze fishing trips, locations, value for money and other such metrics. Lastly, competitive analysis should be undertaken of markets that compete with Canada's recreational fishing sector; and subsequently technological or systemic innovations should be piloted or introduced to get ahead and stay ahead of any current or future competition.

#### **5. Pilot new recreational fishery programs**

Significant time has passed since sector specific programs were piloted in the recreational fishery by the federal or provincial governments. While significant funding has been allocated to conservation and watershed groups, especially species-based advocacy groups, there hasn't been much energy expended at the sectoral level. It is therefore proposed that the federal government consider piloting a variety of programs, such as: a program for early indicators or warnings of stock assessment, which would allow for better planning especially for the emerging, high-growth areas of international clientele. The federal government should also review the feasibility to re-introduce variations of successful Pink-for-Piers temporary net pen program which was designed to have Pink salmon return to areas conducive to increased fishing opportunities for families. In context of concerns about the Southern Resident Killer Whales, and limited abundance of Chinook, it may be useful thus to pilot a "Chinook-for-Piers" program.

#### **6. Solicit whole-of government approaches**

With a view to changing and updating perceptions about its profile, the recreational fishing sector needs to start expecting whole-of-government approaches to its issues, opportunities and challenges. The offerings of the sector are vast, ranging from social programming, environmental custodianship, industry and technological innovations, development of international market, tourism, youth, financing, and Indigenous reconciliation. It is imperative therefore that the sector engages not only the Ministers responsible for fisheries, but also with others in provincial and federal Cabinets; and that governments for their part, start to exploit the expertise and the potential of the sector with whole-of-government perspective in designing policies and programs. As a pro-active measure to initiate this, leaders within the sector will launch public conversations, and expand the sector's reach to federal, provincial, and municipal departments and political leaders into future-oriented discussions.

## **7. Develop partnerships with First Nations**

The recreational fishing sector is proud of its historical relationship with Indigenous people and is committed to supporting reconciliation. It is thus proposed that federal agencies engaged with programming for Indigenous communities consider supporting economic development projects that partner with the recreational fishing sector, especially in the growing international tourism market. There is a considerable amount of shared economic activity already, but the full potential has not been fully explored and opportunities for Indigenous job creation, incorporation of traditional knowledge in the planning of products and services and other opportunities are being missed. It would be timely to initiate pilot projects on traditional knowledge and 3 or 4 projects across the pacific coast on joint economic development. Federal and provincial governments are ideal candidates to initiate, trigger and facilitate this work, and should consider bringing the various diverse interests together to plan such pilot programs.

## **8. Initiate a youth engagement strategy**

There is significant academic and empirical evidence to support that recreational fishing, just like hiking and nature tourism, has tremendous therapeutic benefits. In fact, there are several case studies in Canada, particularly in the province of Quebec whereby youth-at-risk have benefited from recreational fishing. Consequently, it is recommended that the federal and provincial governments partner with the recreational fishing sector to explore the possibility of this type of programming. It is proposed that the Prime Minister may invite sector representatives to make a presentation to his Youth Council. The value of such a tranche of activity is that it would simultaneously promote recreational fishing within urban Canada and provide the much needed renewal for the sector by attracting a younger cadre of Canadians to recreational fishing and exploit its social benefits.

## **9. Address concerns of climate change**

The recreational fishing sector plans to be a leader in addressing climate change. The hallmarks of recreational fishing are already anchored on conservation and sustainability. The sector intends over the next few years and within the span of this report to show leadership in eliminating single use plastics, explore alternate solutions to plastic garbage bags, plastic bait containers, plastic storage boxes and other such menaces to our oceans and waterways. The intention is to take advantage of available or new federal funding to study the extent of this phenomenon and to transition into sustainable technologies and environmentally durable solutions. Sector groups such as the Sport Fishing Institute will work with governmental agencies and explore the availability of partnership and funding programs to address concerns of climate change and options to reduce for example, the use of plastics in lodges, tackle shops and across the industry.

## **10. Engage with new Canadian communities**

One of the unexploited areas of economic and indeed social programming is in new Canadian communities. To a large extent, recreational fishing remains an elusive activity in many urban communities, partially because governments and the sector itself have not paid due attention to promote angling in these communities, and partially because many new Canadians may not instinctively think of recreational fishing as a leisure activity. The proposal therefore is that agencies such as Heritage Canada and provincial social development ministries develop specific programming, which could possibly target new Canadian seniors for potentially day or weekend trips to a local lodge or guided fishing trips. There could also be programming targeted to increase the number of women engaged in angling. These recommendations can be readily advanced with small projects in partnership with numerous groups and sectoral businesses.



# CONCLUSION

Vision 2021 is presented as a submission to those who see the enormous untapped social and economic potential of the recreational fishing sector. It is by no means exhaustive. Rather, it is intended to start and launch a strategic dialogue among political leaders, anglers, entrepreneurs, policy makers, social programmers, and Indigenous communities to explore and identify possibilities of partnership.

This dialogue should ideally be facilitated under the auspices of the federal Minister, and possibly with the participation of provincial and territorial counterparts. Moreover, as an expected outcome the dialogue should aim to develop a detailed path forward, with precisely itemized programs and plans, and an agreement to proceed with funding and investments.

It is clear that implementing Vision 2021 will require investments from the public and the private sectors. These investments are estimated at \$15 million over five years. The Sport Fishing Advisory Board and its member organizations remain convinced that these initial investments will return several-fold in benefits, if all identified parties commit to work together and strengthen our social fabric and grow our economy.