

CATCHING AND CAPTIVATING ANGLERS

TEN-YEAR MARKET DEVELOPMENT PLAN FOR SPORT FISHING IN BC 2007/8 TO 2017/18

April 19, 2007
Final



MARKET DEVELOPMENT PLAN EXECUTIVE SUMMARY

This Market Development Plan for Sport Fishing in BC is a customer focused long-term market development plan to increase angler participation in British Columbia from 2007 to 2017. A comprehensive situation analysis was prepared to build a foundation of factual, quantifiable information, including size and growth of sport fishing, consumer characteristics of resident and visiting anglers, consumer research of freshwater and tidal anglers in BC, analysis of current sport fishing marketing activities, analysis of BC's freshwater and tidal fishing tourism products, overview of stakeholder views, examination of best practices among leading sport fishing jurisdictions, and issues analysis. The planning process included broad stakeholder participation and input.

The key issues the sport fishing market development plan needs to address are as follows:

- Recreational fishing in British Columbia has been faced with an array of social, demographic and environmental changes that have combined to cause a long-term decline in participation.
- Occasional and lapsed anglers in BC present the greatest opportunity for increasing participation and license sales.
- Despite the negative trend of the past decade, there is strong potential for increased fishing among BC residents, particularly among occasional and lapsed anglers. The challenge is to find cost-effective ways to reduce barriers to participation without compromising the resource and to reinforce the emotional appeal of fishing with limited budgets for advertising and communications.
- Youth are essential to the future of angling.
- The fishing licence databases could be used to reach lapsed, occasional and frequent anglers in a direct and targeted fashion.
- Increasing angler participation will require long-term cooperation and coordination among all stakeholders.

OBJECTIVES

The quantifiable objectives from 2007 to 2017 are:

- 30% increase in adult basic licence sales – or almost 177,000 additional licensees.
- 30% increase in juvenile licence sales for tidal water, or almost 13,400 additional licensees.

Table 1. Objectives for Number of Licences Sold from 2007/08 to 2017/18

	2005/06 baseline	2006/07 estimate	2007/08	2008/09	2009/10	2010/11	2011/22	2012/13	2013/14	2014/15	2015/16	2016/17	2017/18
Freshwater Adult Basic Licences (Resident, Non-Resident, Alien)	319,363	338,500	338,500	338,500	342,000	345,000	348,000	355,000	362,000	373,000	384,000	399,000	415,000
<i>Change from previous year</i>	9%	6%	0%	0%	1%	1%	1%	2%	2%	3%	3%	4%	4%
Basic Licences (Resident, Non-Resident)	271,777	277,000	277,000	277,000	280,000	283,000	288,000	294,000	303,000	315,000	328,000	340,000	353,000
<i>Change from previous year</i>	0%	2%	0%	0%	1%	1%	2%	2%	3%	4%	4%	4%	4%
Total Adult Basic Licences	591,140	615,500	615,500	615,500	622,000	628,000	636,000	649,000	665,000	688,000	712,000	739,000	768,000
<i>Change from previous year</i>	5%	4%	0%	0%	1%	1%	1%	2%	2%	3%	3%	4%	4%
Tidal Water Juvenile Licences (Resident, Non-Resident)	44,526	43,000	43,000	43,000	44,000	45,000	46,000	47,500	49,000	51,200	53,200	55,500	57,900
<i>Change from previous year</i>	-8%	-3%	0%	0%	2%	2%	2%	3%	3%	4%	4%	4%	4%

An increase of this magnitude will only be achievable if BC's natural product advantages remain strong (i.e. abundance of sport fish, mild weather, unspoiled scenery, etc.), and there is substantial, sustained and strategic investment in product development and promotion. It is anticipated that the growth rate will be higher in the later years of this 10-year plan, by which time a good portion of the proposed product development initiatives should be in place, and the cumulative effect of the promotional initiatives should be having an impact. As well, the effect of the 2010 Winter Olympic Games on BC's popularity as a tourism destination will be felt in the five years following the Games.

STRATEGIES

In order to achieve the overall objective of a 30% increase in licence sales over the next ten years, it will be necessary to:

- Increase the incidence of fishing among lapsed anglers (now fishing only once or twice every two years)
- Increase the frequency of fishing among occasional anglers (now fishing two to six times every two years)
- Increase the number of youth taking up the sport (which is largely dependent on the involvement of their parents).
- Maintain the current number of frequent anglers (now fishing at least ten times per year) as a minimum.
- Increase the number of anglers visiting from outside BC.
- Increase compliance rates.

Priority Target Groups

Primary: Current and potential anglers living in BC.

While BC resident anglers are lower yield than visitors in terms of tourism revenues, they still represent an estimated 55% of the total spending by anglers on food and accommodation. As well, though BC residents pay lower licence fees than visitors, they account for three-quarters of all licences sold, and approximately two-thirds of the resulting revenue. For these reasons, BC residents are the primary geographic target, and the majority of resources available for this market development plan should be directed within BC. Particular emphasis should be placed on the Lower Mainland, which represents 52% of the BC population, and 44% of the province's current and lapsed anglers. As well, Lower Mainland anglers are more likely to travel outside their region to fish (most often to the Interior or Vancouver Island), making them a priority audience for tourism-oriented messages.

Within BC, there are four target segments on which the market development plan should focus, with strategies and tactics tailored to each segment. Together, they represent 47% of the population.

- Lapsed anglers (those who have fished in the last 10 years, but not in the past two years), representing up to 15% of BC's adult population.
- Occasional anglers (those who have fished one to six days in the past two years), representing up to 15% of BC's adult population.
- Frequent anglers (those who have fished seven or more days in the past two years), representing about 17% of BC's adult population. Within this group, slightly more than half can be described as "avid anglers", having fished more than 20 days in the past two years.
- Youth (ages 2 to 18) representing about 20% of BC's total population. Since most adult anglers began fishing regularly as children or adolescents (more than half between ages 2 and 10) it is critical to the future of sport fishing that as many young people as possible are introduced to the sport, and that they enjoy these formative fishing experiences.

Secondary: Non-resident visitors to BC who are frequent, occasional or lapsed anglers, particularly those from Alberta, Ontario, and Washington state.

Visiting anglers (mainly residents of Alberta, Ontario, Washington State and California) account for just one-quarter of the volume of angling licences sold and one-third of the sales revenue, but they are a significant source of tourism revenue – particularly the more affluent visitors who are likely to use mid to high-end accommodation and the services of guides/outfitters.

Overall Message Strategy

A simple but memorable message about the pleasures of fishing, especially in BC, applied consistently across all types of media and communications, targeting tourists and local anglers alike, will give much-needed unity and strength to promotional activities. This over-arching message should communicate the idea (and the feeling) that fishing is worth finding time for; that it is a uniquely enjoyable aspect of living in BC *and* travelling in BC - emphasizing one over the other as appropriate to the audience and the application.

As revealed in the October 2006 Sport Fishing Development Research and in many research studies in other jurisdictions over the past decade, the appeal of recreational fishing is emotional rather than practical. To anglers, whether frequent, occasional or lapsed, fishing offers a relaxing, peaceful experience, quality time with family or close friends and, above all, a chance to enjoy nature and be on the water. It is important that messages developed to promote sport fishing as a rewarding activity convey this combination of serenity, human connections, and scenic nature.

Although the primary theme described above will be constant, promotional strategies and supporting messages will vary by target segment and season. Wherever possible, messages should include a call-to-action, e.g. buy/renew licences by Internet or phone, or visit the official website for information.

Primary Target Markets	Promotional Strategies	Supporting Messages (in addition to overall theme)
Lapsed Anglers in BC	<ul style="list-style-type: none"> • Proactive media relations and advertising (mainstream, young family-oriented, travel and outdoor focused publications, programs and websites) • Consumer promotions (contests and events) to encourage participation and licence purchase. • Collateral material to be distributed by partners. • These could include standalone activities by individual angling-related organizations, or cooperative activities among these organizations, along with retailers, boat/tackle suppliers, etc. • Comprehensive, one-stop BC fishing website. 	<ul style="list-style-type: none"> • This year, rediscover the pleasures of fishing. • There are good fishing places near you – including beginner/family fishing areas. • Fish stocks are plentiful (where applicable). • Fishing makes a BC outdoors vacation even more enjoyable. • Buying a licence is easy/easier –and essential. • Licence fees go to conserving and enhancing fish stocks and habitats for the future. • Visit the official website for everything you need to know about fishing in BC. • Family fishing events information (seasonal).

Primary Target Markets	Promotional Strategies	Supporting Messages (in addition to overall theme)
Occasional Anglers in BC	<ul style="list-style-type: none"> • As above, with the addition of direct mail and/or e-mail (using information from the fishing licence databases) 	<ul style="list-style-type: none"> • This year, make time to go fishing more often. • There are good places to fish near you – including beginner/family fishing areas. • Fish stocks are plentiful (where applicable). • Fishing makes a BC outdoors vacation even more enjoyable. • Renew your licence now – it’s easy, and essential. • Licence fees go to conserving and enhancing fish stocks and habitats for the future. • Visit the official website for the most up-to-date information about fishing in BC and to plan your fishing vacation. • Family Fishing and other event information (seasonal).
Frequent Anglers in BC	<ul style="list-style-type: none"> • As above, with increased emphasis on direct mail/e-mail and fishing-focused publications, programs and websites. This group will be the source of “angling ambassadors” to teach and promote fishing to children who are family members and friends. • Coordination with existing angling groups and angling businesses to help communicate the messages. 	<ul style="list-style-type: none"> • This year, share the pleasures of fishing with family and friends • There are now designated beginner/family fishing areas close to you. • Visit the official website to plan your fishing vacation and/or for up-to-date info on fishing in BC • Renew your licence now – it’s easy, and essential. • Licence fees go to conserving and enhancing fish stocks and habitats for the future • Purchase a licence as a gift for a fishing companion – can be packaged with guide and regulations. • Family fishing event information (seasonal).
Youth 2 to 15	<ul style="list-style-type: none"> • Youth will be reached primarily through adult relatives, as they are the primary source of information and encouragement for young anglers. Direct promotions to this group would be limited, with focused efforts on schools, youth groups and youth-oriented media to build awareness of events/programs for beginners. 	<ul style="list-style-type: none"> • Family fishing and learn-to-fish program information (seasonal).

Secondary Target Markets	Promotional Strategies	Supporting Messages (in addition to brand message)
<ul style="list-style-type: none"> • Frequent, occasional and lapsed anglers in Alberta, Ontario and western US. 	<ul style="list-style-type: none"> • Proactive media relations and advertising in travel and outdoor focused publications, programs and websites. • Collateral material to be distributed by partners. • Consumer promotions (primarily contests) to generate interest in BC fishing vacations (entry forms could also be used to compile a database for future messages). • These could include standalone activities by the Sport Fishing Institute, Freshwater Fisheries Society of BC or Tourism BC, and cooperative activities with the BC Fishing Resort & Outfitters Association. • Enhanced fishing content on Tourism BC website providing (directly if possible, or via links to other sites) up-to-date information on fishing locations in BC (including locations suitable for beginners), fish species and abundance, on-line licence purchase, interactive trip planner, etc 	<ul style="list-style-type: none"> • Superlative fishing is just one reason to visit BC – with examples of other activities likely to appeal to anglers and non-angling companions (e.g. golf). • Visit www.HelloBC.com/sportfishing for the most up-to-date information on fishing in BC and to plan your vacation.

TACTICS

The tactics to help achieve the objectives and strategies are as follows (tactics are detailed for first five years only):

Tactic	2007	2008	2009	2010	2011
Product Development Tactics					
1. Coordinate with supply side organizations to help ensure the needs of BC's sport fishing sector are addressed.					
2. Develop more accessible fishing locations and/or enhance existing locations near urban areas.					
3. Create designated family fishing opportunities.					
4. Facilitate and encourage the growth of family-oriented fishing events, including Family Fishing Weekend.					
5. Evaluate Learn-To-Fish programs for long-term impact on youth participation rates. Expand if positive.					
6. Implement and evaluate on-line sales of freshwater licences.					
7. Encourage greater acceptance of on-line tidal water licences.					
8. Investigate alternative types of licences and discounts, including juvenile FW licences (Product Innov. Plan).					
9. Investigate feasibility and consumer appeal of gift licences (or certificates) (Product Innov. Plan).					
10. Review regulations on ongoing basis to ensure they are simple to follow for each type of angler.					
11. Encourage industry operators to expand their tourism products – angling with other vacation activities.					
12. Develop a comprehensive inventory of angling-related products (tourism and non-tourism).					
13. Determine long term funding strategy for this Marketing Development Plan.					
Promotional Tactics					
14. Enhance fishing content on www.hellobc.com and add relevant angling links.					
15. Develop online marketing campaign to drive traffic to www.HelloBC/sportfishing.					
16. Increase emphasis on angling in vacation planners, websites, and other tourism marketing materials.					
17. Develop www.bcfishing.com to be the official and most effective resource for sport fishing in BC.					
18. Build online presence for revamped www.bcfishing.com through online marketing.					
19. Plan and execute a multi-media adv. campaign to encourage fishing in BC by BC residents.					
20. Develop and implement an annual media relations/publicity program aimed at BC residents.					
21. Develop and maintain inventory of fishing events around the province.					
22. Develop/promote annual contests.					
23. Compile database of previous licence holders, conduct limited direct mktg campaign -- licence renewals.					
24. Develop a direct marketing campaign to encourage anglers to introduce youth to the sport.					
25. Review and expand current library of high quality angling images for use in marketing materials.					
26. Review highway signage related to sport fishing locations to determine how they need to be improved.					

Tactic	2007	2008	2009	2010	2011
Research and Evaluation Tactics					
27. Conduct annual or biannual surveys with BC residents.					
28. Use licence application forms to capture demographic information.					
29. Coordinate with other research surveys related to anglers.					