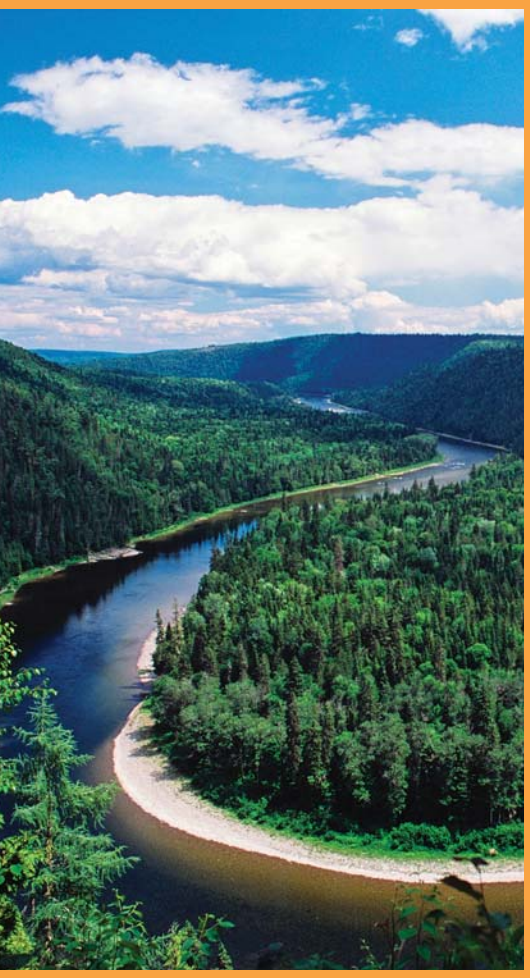


THE ECONOMIC IMPACTS OF OUTFITTING IN CANADA

CFOA
CANADIAN FEDERATION OF OUTFITTER ASSOCIATIONS

SOUTHWICK
ASSOCIATES

CFOA'S VISION

A Canada with abundant fish and wildlife resources for all to enjoy for generations to come, with a prosperous and respected professional outfitting industry.

Overall Economic Impact of the Outfitting Industry in Canada ($000s)

METRIC	DIRECT EFFECT	MULTIPLIER EFFECT	TOTAL EFFECT
Total Output	$2,673,264	$2,876,554	$5,549,817
GDP	$1,145,917	$1,518,745	$2,664,663
Jobs*	21,943	15,311	37,254
Salaries and Wages	$806,746	$792,242	$1,598,988
Taxes (Total)	$517,816	$139,498	$657,314
Federal	$173,827	$33,860	$207,687
Provincial	$273,253	$70,592	$343,845
Municipal	$70,736	$34,811	$105,546

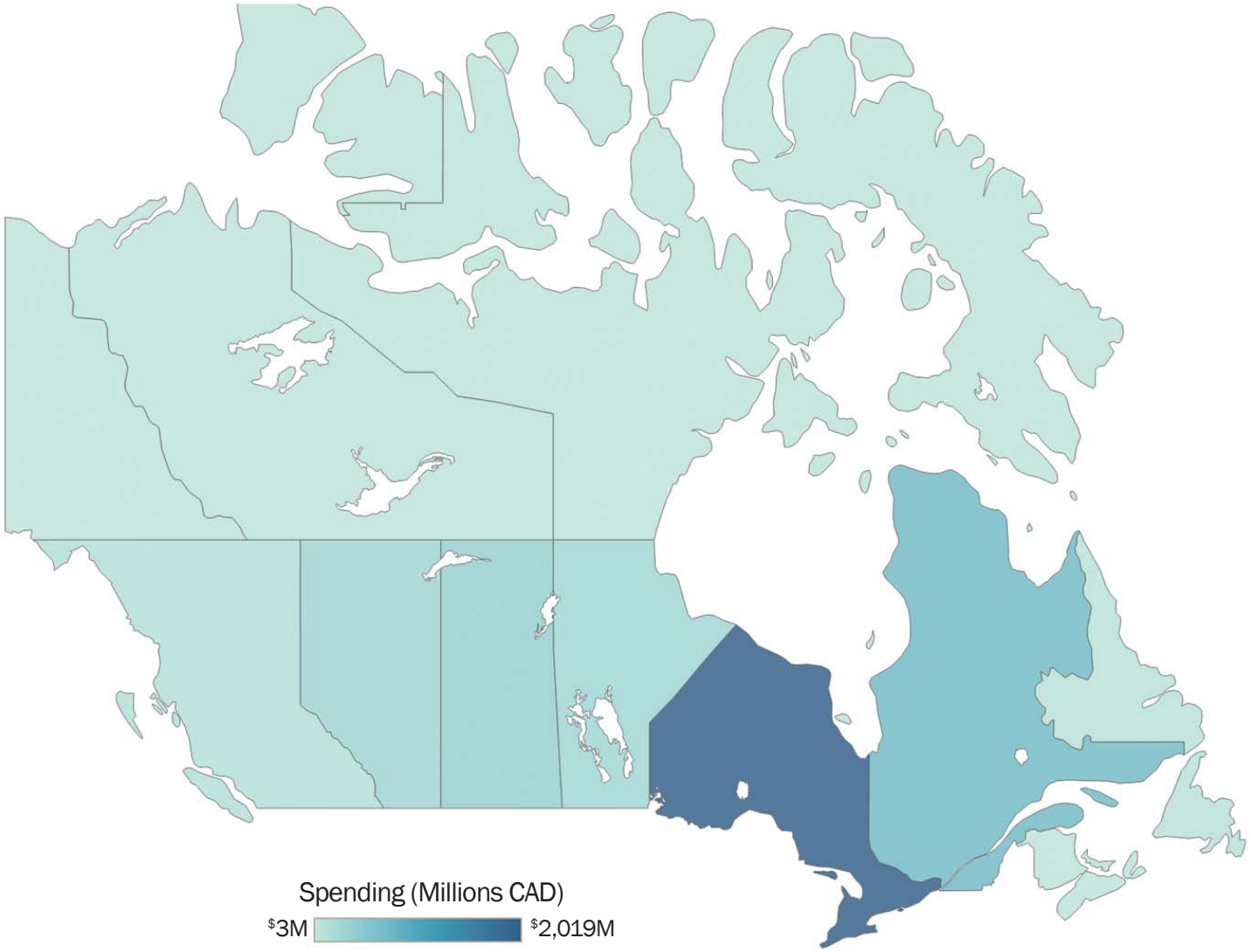
* THE NUMBER OF JOBS IS NOT PRESENTED IN THOUSANDS

In 2017, the hunting and fishing outfitting industry contributed nearly $2.7 billion to Canada's GDP and supported over 37 thousand jobs nationwide.

OVERVIEW

Canada is a nation rich in natural resources, breathtaking scenery and some of the most sought-after game and fish species in the world. As a result, outfitting services for hunting and fishing in Canada are big business as sportsmen from across North America and around the globe flock to the country for the adventure of a lifetime.

2017 Outfitting Industry Spending by Province



STUDY BACKGROUND

The Canadian Federation of Outfitter Associations (CFOA), which represents outfitter interests across all of the nation's provinces and territories, recently teamed up with Southwick Associates, the leading market research, statistics and economics firm specializing in hunting, shooting, recreational fishing and outdoor recreation, to examine the overall impact the outfitter industry has on the Canadian economy.

Although the CFOA is a national organization representing outfitting interests across Canada, outfitting in Canada is regulated at the provincial level. As a result, there is not a nationwide definition of what a guide or outfitter is, as well as no single source of data from which to pull information about outfitter revenue and expenditures, services offered or numbers of clients. Because guides and outfitters in Canada are typically represented by their own provincial industry associations, the CFOA remains the only national source to help coordinate the interests of Canada's outfitters and guides.

METHODOLOGY

There are two ways that outfitters and their clients contribute to the provincial and national economies from hunting and fishing. First are the expenditures made by the outfitters themselves to run their operations. This can include the purchase of equipment, food, gas, salaries and more. The largest economic impacts, however, come from spending by clients beyond what they pay to the outfitters. This includes travel, equipment, hunting and fishing supplies, licenses and other services related to taking an outfitted trip.

So how were the results presented in this report obtained? This study relied on conducting separate surveys of Canadian outfitters and their clients. A survey of outfitters provided a clear picture of outfitter spending, and helped to identify how many clients outfitters serve in an average year. A second survey fielded to clients revealed how much and on what these clients are spending their money on, during and in preparation for an outfitted trip. Wherever possible, estimates of activity and spending were also made for individual provinces. The economic impacts that result from both outfitter and client spending were quantified by Statistics Canada through their Interprovincial Input-Output model.

OUTFITTERS & CLIENTS: HOW MANY?

A key goal of this effort was to determine the number of participants, both nationally and by province, who engage in outfitted hunting or fishing each year. Since there is no national registry of outfitting operations, the number of outfitters in each province was provided by the CFOA. When surveyed, outfitters were asked about the number of clients that they serve annually, and these responses were used to estimate the total number of outfitted anglers and hunters across Canada.

Participants in Outfitted Hunting and Fishing

AREA	OUTFITTERS	FISHING CLIENTS	HUNTING CLIENTS
Canada	**3,748**	**533,494**	**198,570**
Alberta	505	5,789	18,435
British Columbia	245	5,918	4,913
Manitoba	300	12,093	20,451
New Brunswick	25	836	626
Newfoundland and Labrador	150	4,953	3,719
Nova Scotia	38	1,286	940
Northwest Territories	20	579	783
Nunavut	23	772	587
Ontario	1,360	324,225	105,804
Prince Edward Island	4	129	117
Quebec	592	159,226	18,985
Saskatchewan	460	16,853	22,545
Yukon	26	836	666

Over 730,000 clients used the services of a Canadian fishing or hunting outfitter in 2017.

Outfitter Revenue Sources

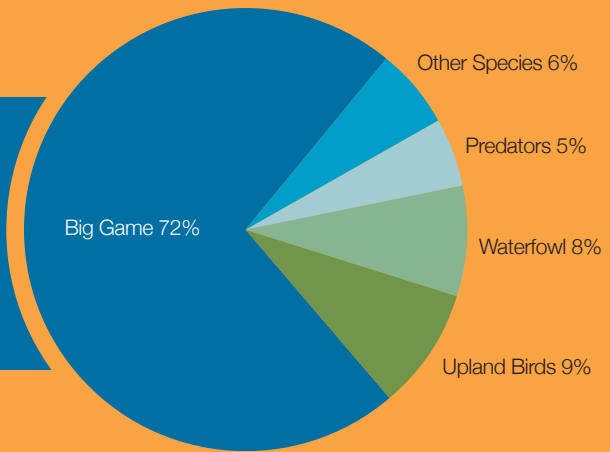
AREA	HUNTING	FISHING	NON-HUNTING/ FISHING ACTIVITIES
Canada	**65%**	**28%**	**7%**
Alberta	86%	11%	3%
British Columbia	82%	12%	6%
Manitoba	67%	27%	6%
New Brunswick	*	*	*
Newfoundland and Labrador	79%	17%	4%
Nova Scotia	*	*	*
Northwest Territories	49%	41%	9%
Nunavut	*	*	*
Ontario	23%	64%	13%
Prince Edward Island	*	*	*
Quebec	33%	54%	13%
Saskatchewan	69%	25%	6%
Yukon	93%	4%	3%

(*) INDICATES A PROVINCE WITH SAMPLE SIZE TOO LOW TO REPORT

OUTFITTER REVENUE

Hunting trips are the most important source of revenue for outfitters nationally, although there is substantial variation at the provincial level. Both Ontario and Quebec collect more revenue from fishing than hunting. Across Canada, non-hunting and fishing activities make up just a small proportion of revenue for most outfitters.

Outfitter Hunting Revenue by Game Type



BIG GAME RULES

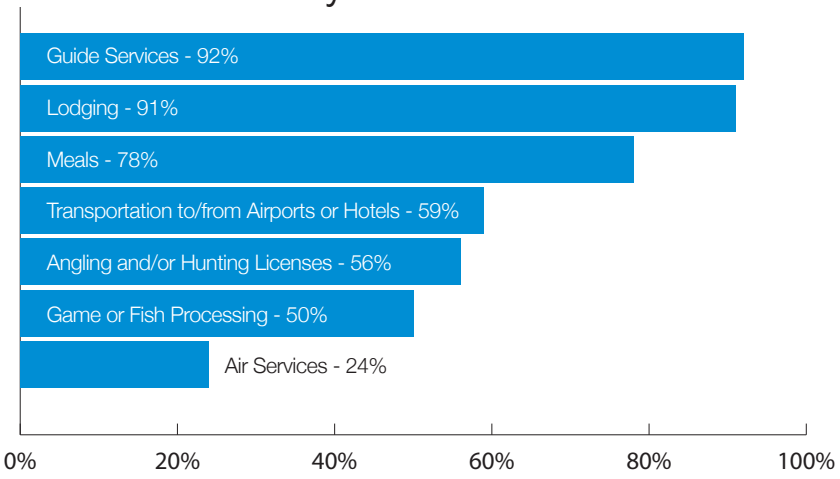
Outfitted hunting trips are what generates 65% of total outfitter revenues in Canada. What are these hunters coming for?

OUTFITTER INDUSTRY PROFILE

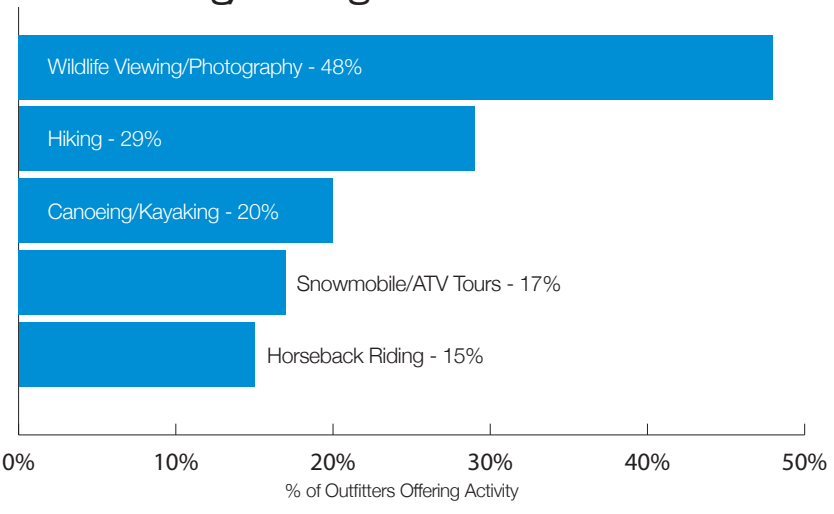
In addition to hunting and fishing services, many outfitting operations provide additional services that enhance the hunting or fishing experience or offer clients other ways to enjoy Canada's great outdoors.

In fact, a majority (60%) of Canadian outfitting operations offer non-hunting/fishing activities for their clients who are interested in different types of outdoor recreation.

Services Offered by Canadian Outfitters



Non-Hunting/Fishing Activities



SPENDING

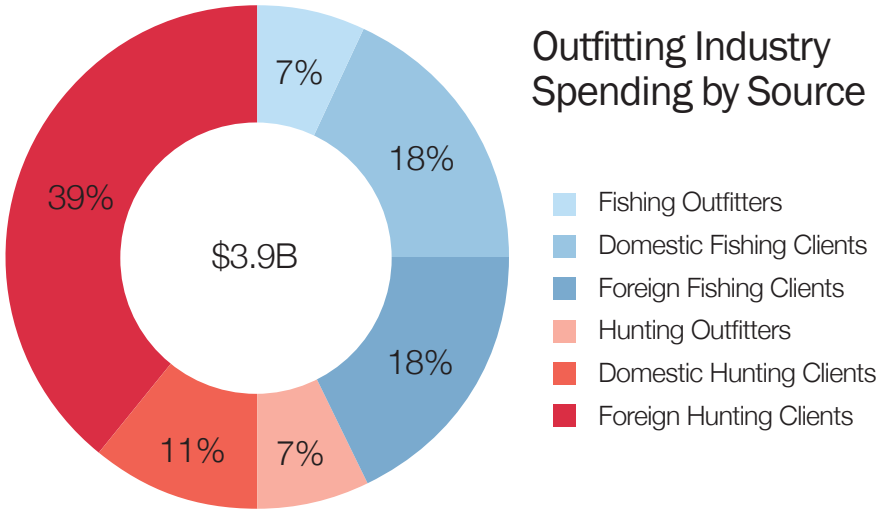
Nationally, hunting accounted for 57% of spending in the outfitting industry, with fishing making up the remaining 43%.

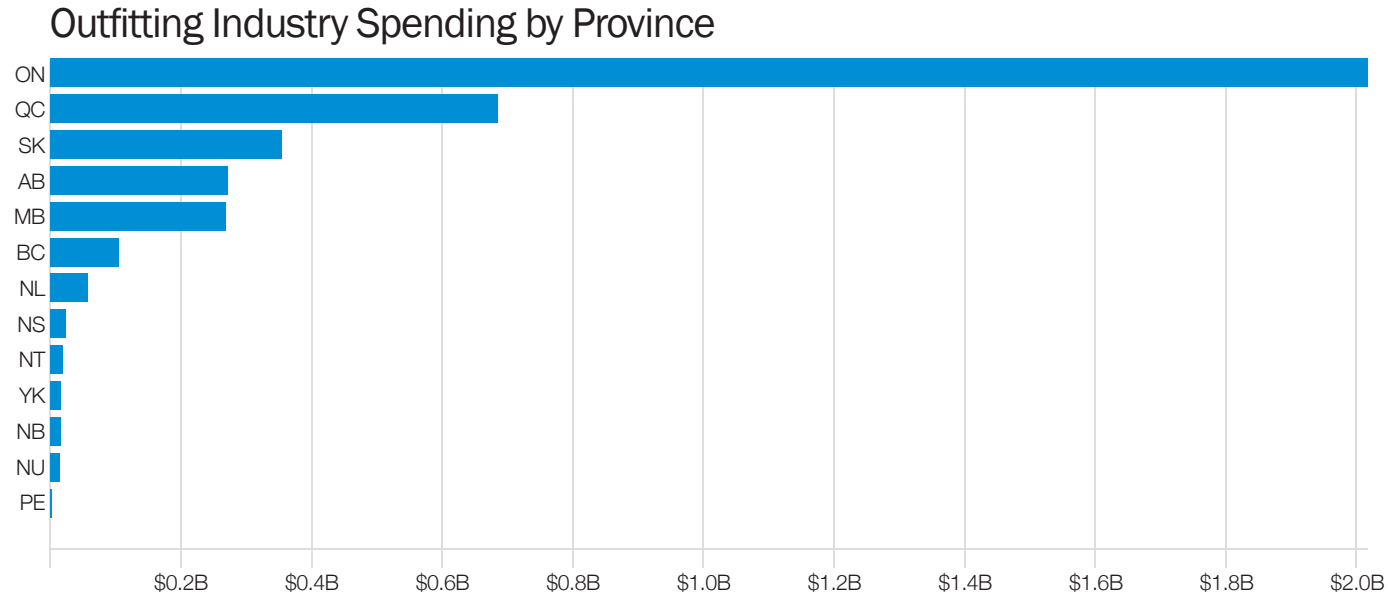
Hunting clients spend the most of any group, with foreign visitors accounting for most of the spending on hunting trips and equipment.

Foreign and Canadian fishing clients spend about the same amount pursuing trophy catches with an outfitter.

Outfitters themselves account for one-fifth of the total spending, split between outfitters offering fishing trips and those who offered hunting experiences. It is important to note that this outfitter spending went to more than the trips themselves; much of it was spent on general operating costs including groceries, utilities, etc.

Ontario, the province with the largest number of outfitters, accounted for over half of expenditures within the national outfitting industry.





OUTFITTER SPENDING

In 2017, fishing outfitters spent a total of $282 million, while hunting outfitters spent a total of $270 million for a total of $553 million in operating costs. The most was spent by outfitters in Ontario and Quebec at just over $150 million total for each province.

Outfitter Spending in 2017 by Type of Outfitting ($000s)

PROVINCE	FISHING	HUNTING	TOTAL
Canada	**$282,216**	**$270,724**	**$552,940**
Alberta	$6,043	$55,739	$61,783
British Columbia	$5,798	$34,739	$40,537
Manitoba	$22,606	$16,953	$39,560
New Brunswick	$1,350	$5,192	$6,542
Newfoundland and Labrador	$1,080	$4,154	$5,233
Nova Scotia	$2,689	$10,341	$13,029
Northwest Territories	$1,415	$5,443	$6,857
Nunavut	$1,242	$4,777	$6,018
Ontario	$118,116	$32,357	$150,473
Prince Edward Island	$216	$831	$1,047
Quebec	$97,325	$53,402	$150,727
Saskatchewan	$22,933	$41,397	$64,330
Yukon	$1,404	$5,400	$6,803

Canadian outfitters also donated an estimated $16 million to habitat/wildlife conservation groups in 2017, and an additional $7 million to other charitable organizations. These contributions were made either through cash or hunting/fishing related donations.

Hunters and fishermen from the U.S. are higher yield travelers, staying for a longer time in Canada than the average stay by Americans while visiting Canada.[1]

Total Hunting Spending in 2017 by Client Residency ($000s)

PROVINCE	DOMESTIC CLIENTS	FOREIGN CLIENTS	TOTAL
Canada	**$415,875**	**$1,509,755**	**$1,925,630**
Alberta	$22,620	$171,827	$194,447
British Columbia	$9,314	$39,283	$48,597
Manitoba	$42,832	$155,485	$198,317
New Brunswick	$733	$5,909	$6,642
Newfoundland and Labrador	$4,352	$35,086	$39,438
Nova Scotia	$1,099	$8,864	$9,963
Northwest Territories	$916	$7,386	$8,303
Nunavut	$687	$5,540	$6,227
Ontario	$212,749	$821,946	$1,034,695
Prince Edward Island	$137	$1,108	$1,245
Quebec	$101,123	$22,824	$123,947
Saskatchewan	$18,534	$228,218	$246,752
Yukon	$779	$6,279	$7,057

Total Fishing Spending in 2017 by Client Residency ($000s)

PROVINCE	DOMESTIC CLIENTS	FOREIGN CLIENTS	TOTAL
Canada	**$680,158**	**$693,802**	**$1,373,959**
Alberta	$5,407	$9,553	$14,960
British Columbia	$5,527	$9,765	$15,293
Manitoba	$11,295	$19,955	$31,251
New Brunswick	$919	$1,380	$2,298
Newfoundland and Labrador	$4,713	$8,173	$12,887
Nova Scotia	$1,334	$2,123	$3,456
Northwest Territories	$681	$955	$1,637
Nunavut	$859	$1,274	$2,133
Ontario	$252,748	$581,292	$834,040
Prince Edward Island	$266	$212	$479
Quebec	$379,805	$29,929	$409,734
Saskatchewan	$15,683	$27,810	$43,493
Yukon	$919	$1,380	$2,298

1. SOURCE: SPORT FISHING AND GAME HUNTING IN CANADA AN ASSESSMENT ON THE POTENTIAL INTERNATIONAL TOURISM OPPORTUNITY, CANADIAN TOURISM COMMISSION, OCTOBER 2012, PAGE 11.
2. THE CLIENTS' SPENDING ON OUTFITTER FEES IS NOT INCLUDED IN ESTIMATING THE IMPACTS BECAUSE IT IS ALREADY CAPTURED IN THE OUTFITTERS' SPENDING. IT'S OMITTED HERE TO AVOID DOUBLE COUNTING.

CLIENT SPENDING

Client spending on outfitted trips is where the real power for this economic engine begins to rev up. Expenses for Canadian fishing clients average $1,031 per trip. Key items for these sportsmen include airfare, local transportation, restaurants and bars, taxidermy, gifts and souvenirs, tips, equipment (including rods, reels, tackle, etc.), personal items such as toiletries and other miscellaneous expenses. Likewise, clients visiting from other countries spend an average of $2,288 per fishing trip on many of the same expense categories.[1]

As for hunting clients, Canadians spend an average of $3,198 per outfitted hunting trip. Expenses range from airfare, local transportation, bars and restaurants and fuel and oil to taxidermy, equipment specific to the hunt, firearms and archery equipment, personal items, tips and more. Foreign visitor spending is more than double the average of Canadian residents at $7,537 with higher airfare and travel expenses being the primary reason for the difference. All of these direct expenditures form the basis for determining the overall economic impact of outfitted hunting in Canada.

ECONOMIC IMPACTS

The $3.8 billion spent by hunters, anglers and outfitters in Canada is quite an economic juggernaut but the benefits to the nation's economy don't end there. Those dollars have a ripple effect through the economy, spurring increases in the production of the goods and services that outfitters and their clients rely on. People working in industries impacted by this spending also benefit, and in turn have more money to spend themselves. These multiplier effects generate significant additional activity across the economy, supporting jobs and creating wages and tax revenues at the local, provincial and national levels.

Some of the jobs directly related to the outfitting industry include guides and staff at lodges. Workers involved in producing, transporting and selling the food, fuel and equipment purchased by outfitters and their clients also benefit indirectly from these activities.

Total Economic Impacts of the Canadian Outfitting Industry in 2017 ($000s)[3]

PROVINCE	OUTPUT	GDP	JOBS	LABOR INCOME	TAX REVENUES		
					FEDERAL	PROVINCIAL	MUNICIPAL
Canada	**$5,549,817**	**$2,664,663**	**37,254**	**$1,598,988**	**$207,687**	**$343,845**	**$105,546**
Alberta	$667,654	$327,015	2,682	$164,429	$15,888	$11,361	$10,743
British Columbia	$403,399	$191,793	2,467	$116,395	$6,660	$15,265	$6,817
Manitoba	$342,548	$165,073	2,410	$96,573	$14,972	$19,695	$6,595
New Brunswick	$75,401	$30,966	479	$18,466	$1,120	$2,624	$845
Newfoundland and Labrador	$76,775	$41,040	496	$22,235	$3,406	$5,768	$1,003
Nova Scotia	$96,907	$41,902	408	$23,027	$2,361	$2,329	$1,443
Northwest Territories	$49,262	$23,413	374	$14,451	$741	$1,506	$1,059
Nunavut	$17,511	$8,182	64	$5,231	$691	$338	$309
Ontario	$2,471,531	$1,193,913	17,151	$739,604	$110,235	$169,158	$50,687
Prince Edward Island	$13,694	$6,514	128	$3,832	$241	$682	$78
Quebec	$922,345	$435,166	7,169	$271,896	$33,130	$75,348	$19,549
Saskatchewan	$432,744	$214,898	2,848	$113,858	$18,533	$20,334	$6,613
Yukon	$19,535	$9,021	145	$5,811	$705	$474	$428

CONCLUSION

As a country boasting expansive wild areas teeming with a variety of wildlife and waters rich in a multitude of fish species, it is hard to imagine a Canadian landscape where hunting and fishing didn't figure prominently. It is a lifestyle for many Canadian residents, while the promise of wilderness adventure draws people from around the world to enjoy the nation's incredible natural resources. The positive economic impacts that these wild places generate for the Canadian people is truly astounding. Overall, hunting and fishing outfitters are very beneficial for Canada, providing revenues and jobs that benefit everyone. Perhaps just as importantly, these outfitters provide both residents and visitors alike the opportunity to enjoy and appreciate the country's abundant natural resources and wildlife.

3. BASED ON SPENDING BY ANGLERS, HUNTERS AND OUTFITTERS

This report was produced by Southwick Associates at the request of the Canadian Federation of Outfitter Associations. A technical report, including detailed methodology and complete results, is available upon request.
Visit CFOA's website for contact information: www.canada-outfitters.com.

CFOA
CANADIAN FEDERATION OF OUTFITTER ASSOCIATIONS

SOUTHWICK ASSOCIATES

QOF
QUEBEC OUTFITTERS FEDERATION INC.

Guide Outfitters Association of British Columbia
Wildlife First™

Newfoundland Labrador OUTFITTERS

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POGA-APGP
POGA-NB.CA

SCPO
Saskatchewan Commission of Professional Outfitters

ASSOCIATION OF MACKENZIE MOUNTAINS OUTFITTERS

Alberta PROFESSIONAL Outfitters Society

MANITOBA LODGES & OUTFITTERS ASSOC.

NOTO
Nature & Outdoor Tourism Ontario

YUKON OUTFITTERS ASSOCIATION

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