



New Sportfishing Data and Industry Trends 2013

Special ASA - Southwick Associates Report

Only Available Here, Today!

What's in the report?

- ↳ ASA Business Outlook survey results
- ↳ Sportfishing economic impacts
- ↳ Size of fishing market
- ↳ Angler profiles
- ↳ Avid vs. average angler data
- ↳ Regional market information
- ↳ Media consumption
- ↳ Import details
- ↳ License trends
- ↳ And more...

Economic Impacts of Sportfishing



Fishing

33.1 Million Americans

- ✓ Way more than the 25.7 million participants who played golf in 2011.

Fishing

\$47.7 Billion in Retail Sales

✓ **More than the combined annual sales of Subway, Verizon Wireless, and 7-Eleven.**

Fishing

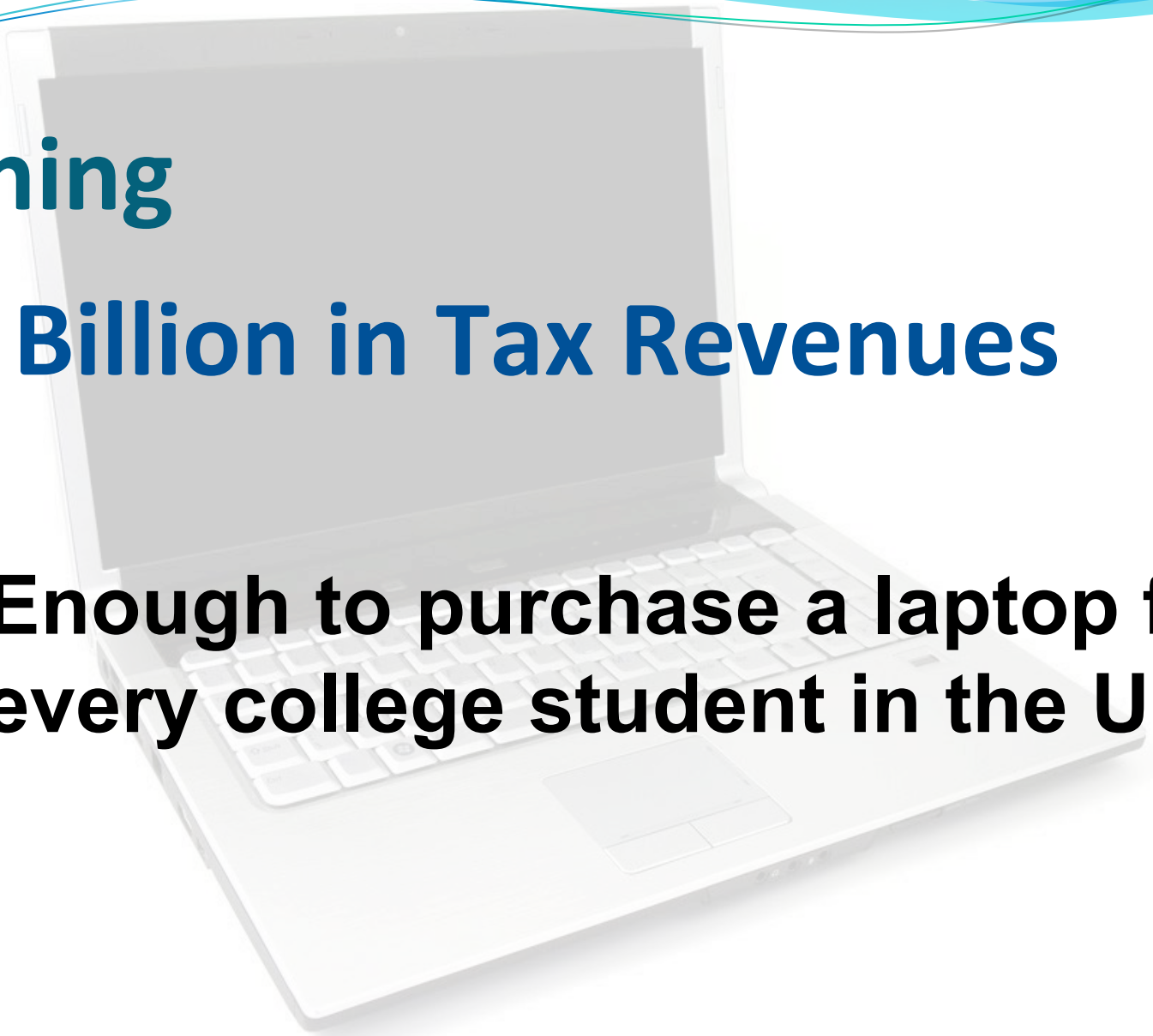
828,133 JOBS

✓ Well more than the 420,000
McDonald's® employees in the U.S.!

Fishing

\$15 Billion in Tax Revenues

- **Enough to purchase a laptop for every college student in the U.S.!**



For copies:

www.ASAfishing.org/facts-figures/




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Leading the Way for Sportfishing's Future
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FACTS & FIGURES

- Angler Participation
- Sales and Imports
- Sportfishing Economics
- Studies and Surveys
- ASA Partners and Resources

Recreation Fishing – An Economic Powerhouse


Recreation fishing is a business. If sportfishing were a corporation, the amount spent by anglers to support their hobby would rank it number 51 on the Fortune 500™ list. The economic contribution of fishing have grown steadily over the last several decades.

This page provides a range of recreational fishing-related information and data from angler surveys, market research reports, and retail trends, imports, fishing license sales and much more.


According to the U.S. Fish and Wildlife Service's 2011 National Survey of Fishing, Hunting and Wildlife-Associated Recreational, more than 40 million licensed anglers generate over \$46 billion in retail sales with a \$115 billion impact on the nation's economy creating employment for more than 828,000 people. The political clout is even greater when you consider at least 60 million anglers fished at some point over the past five-year period.

If you have any questions or are looking for additional information, please [contact Communications Director Mary Jane Williamson](#), (703) 519-9691, x227.

Learn more about how you can keep America fishing... **KEEP AMERICA FISHING**

 **FISH AMERICA FOUNDATION**

ANGLERSURVEY.COM
Help shape fishing's future

 **TAKE ME FISHING™**
Learn more...

asafishing.org/facts-figures/

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Sportfishing Participation Trends

2012 License Sales

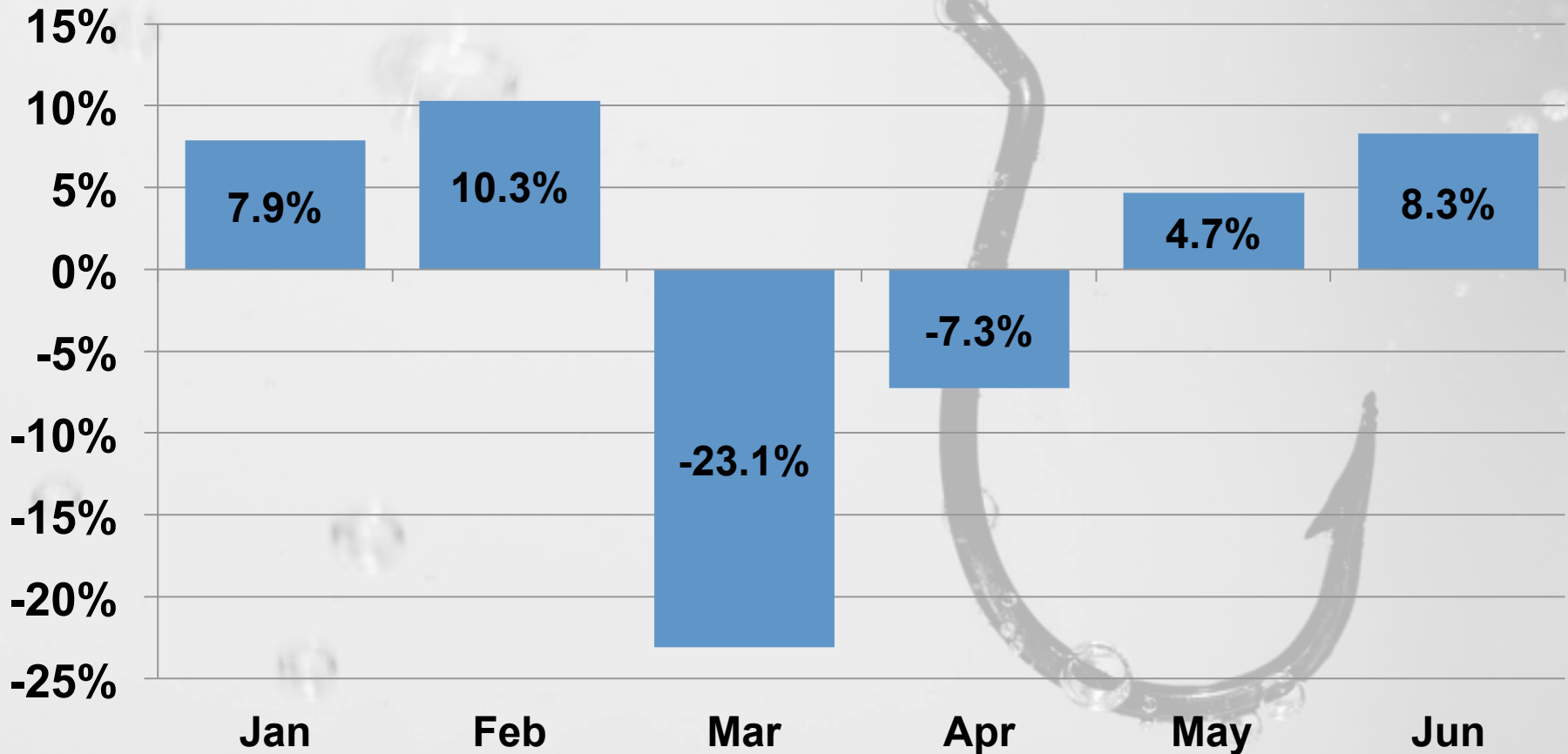


* Per RBFF-ASA License
Index:

Up 5.0%!

2013 Sales are Down 3.4%

Change in License Sales - 2013 vs. 2012



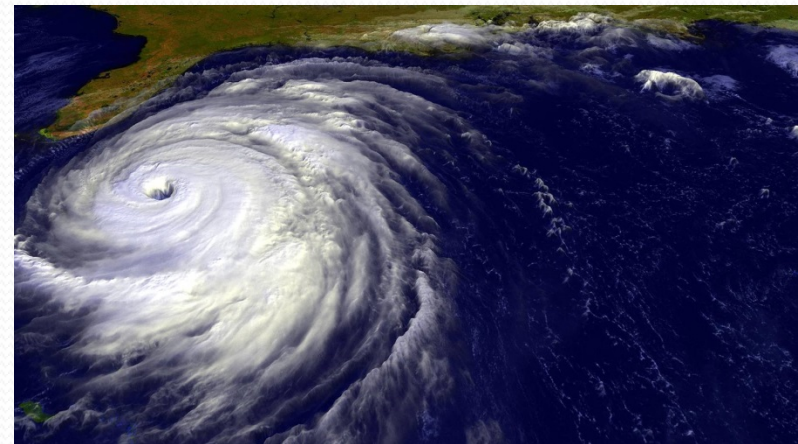
Factors Driving Participation

LONGER TERM:

1. Cultural trend (-)
2. License prices & regulations (-)
3. Last year's anglers (+)
4. Construction, fuel prices (-)

SHORT TERM:

1. Weather (-/+)
2. Regulations/pricing (-)
3. Economy (_/+)



Factors Driving Participation

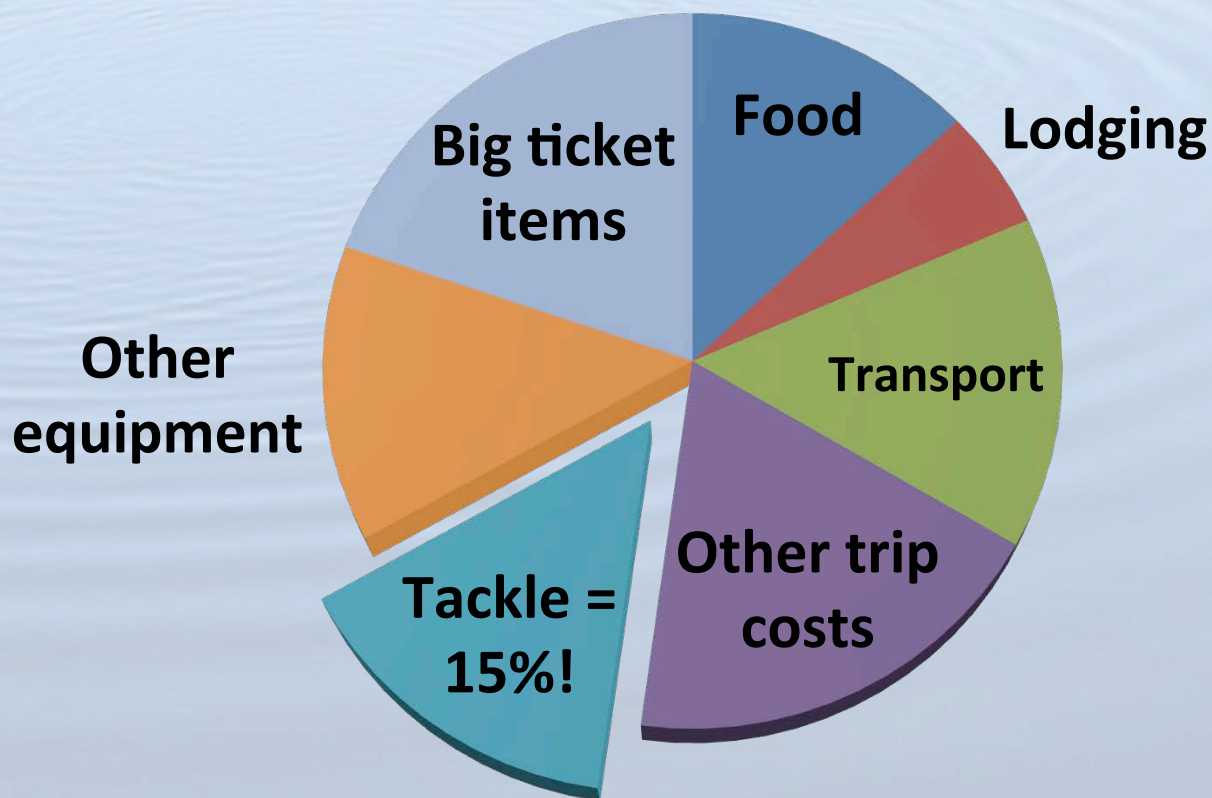
Why the difference across states? (2005-2010)

1. License price changes (-)
2. Total population (+)
3. Coastal/Saltwater (+)
4. (tie) RBFF (2008-2010 only)
and Construction (+)

U.S. Retail Tackle Market: Size & Trends

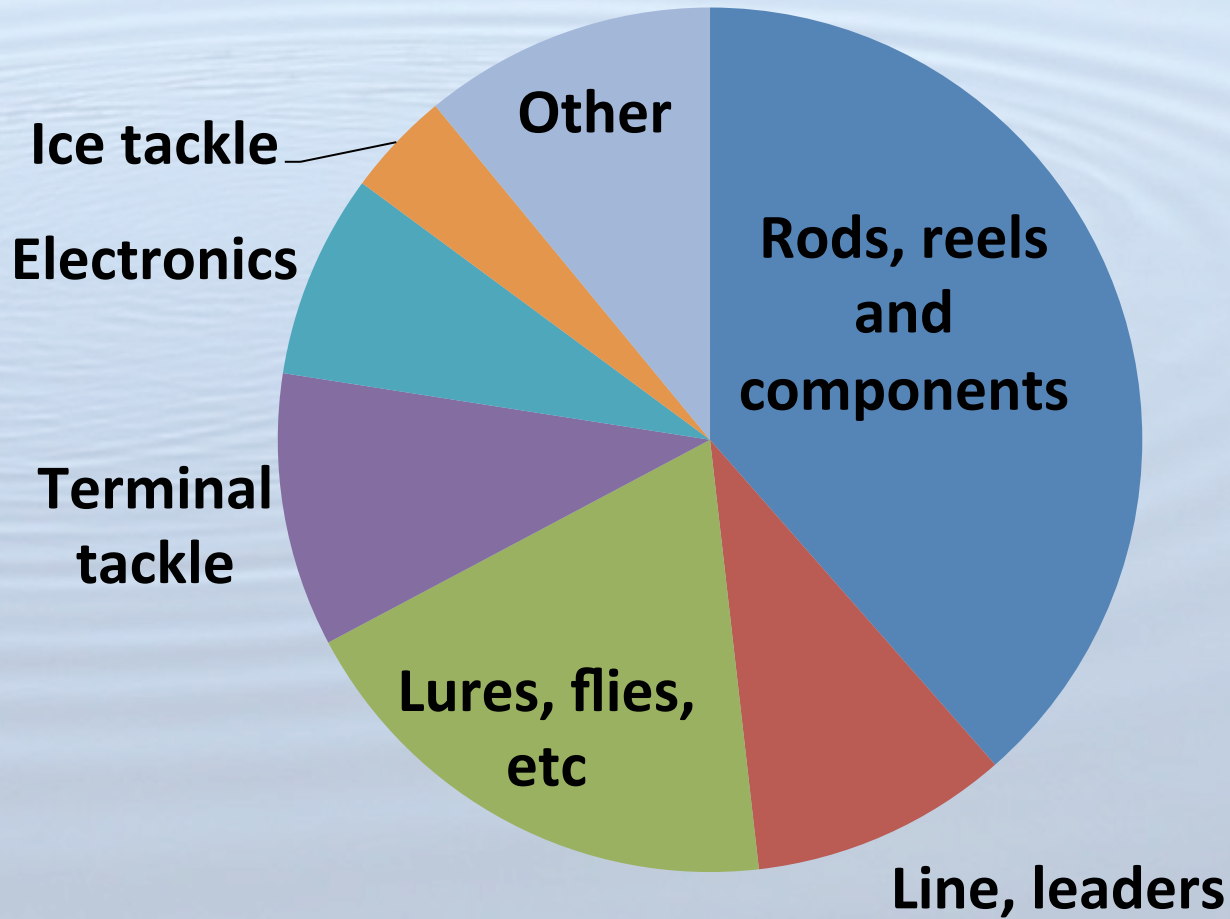


Tackle is just a part of the sportfishing economy



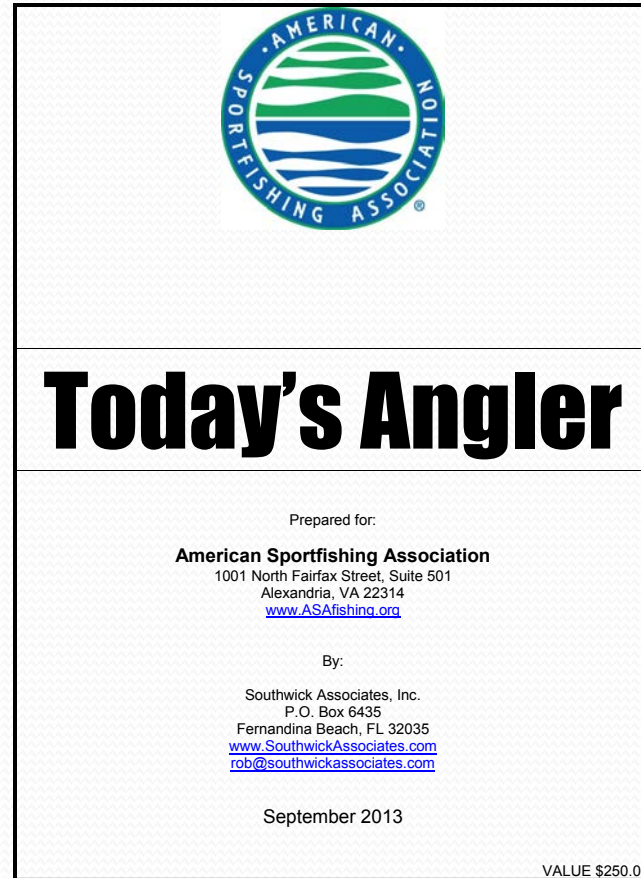
All sportfishing expenditures = \$47.7 billion

Type of Tackle Sold:



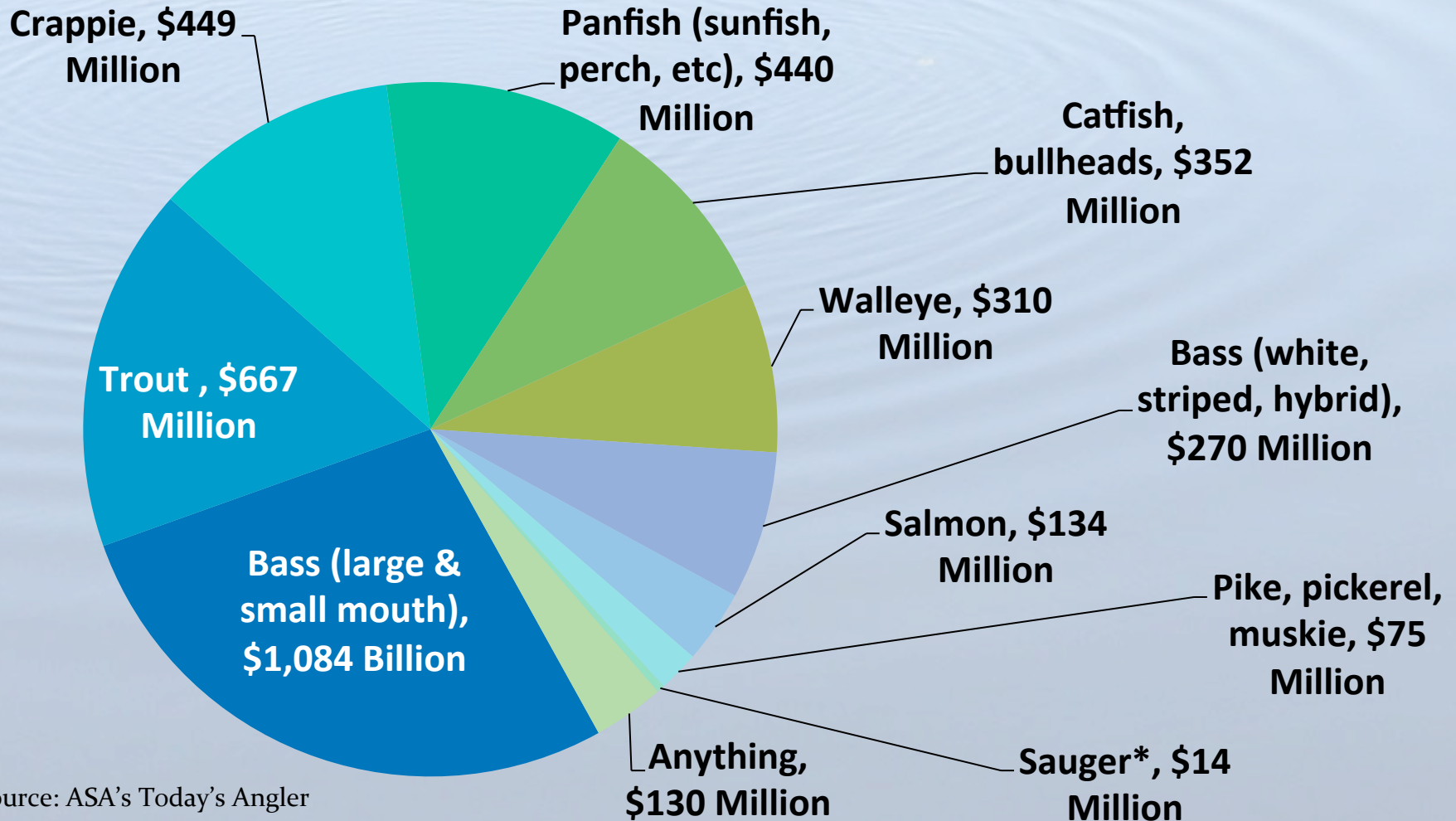
2011 U.S. Tackle Sales = \$6.1 billion

New Report for Members Only!

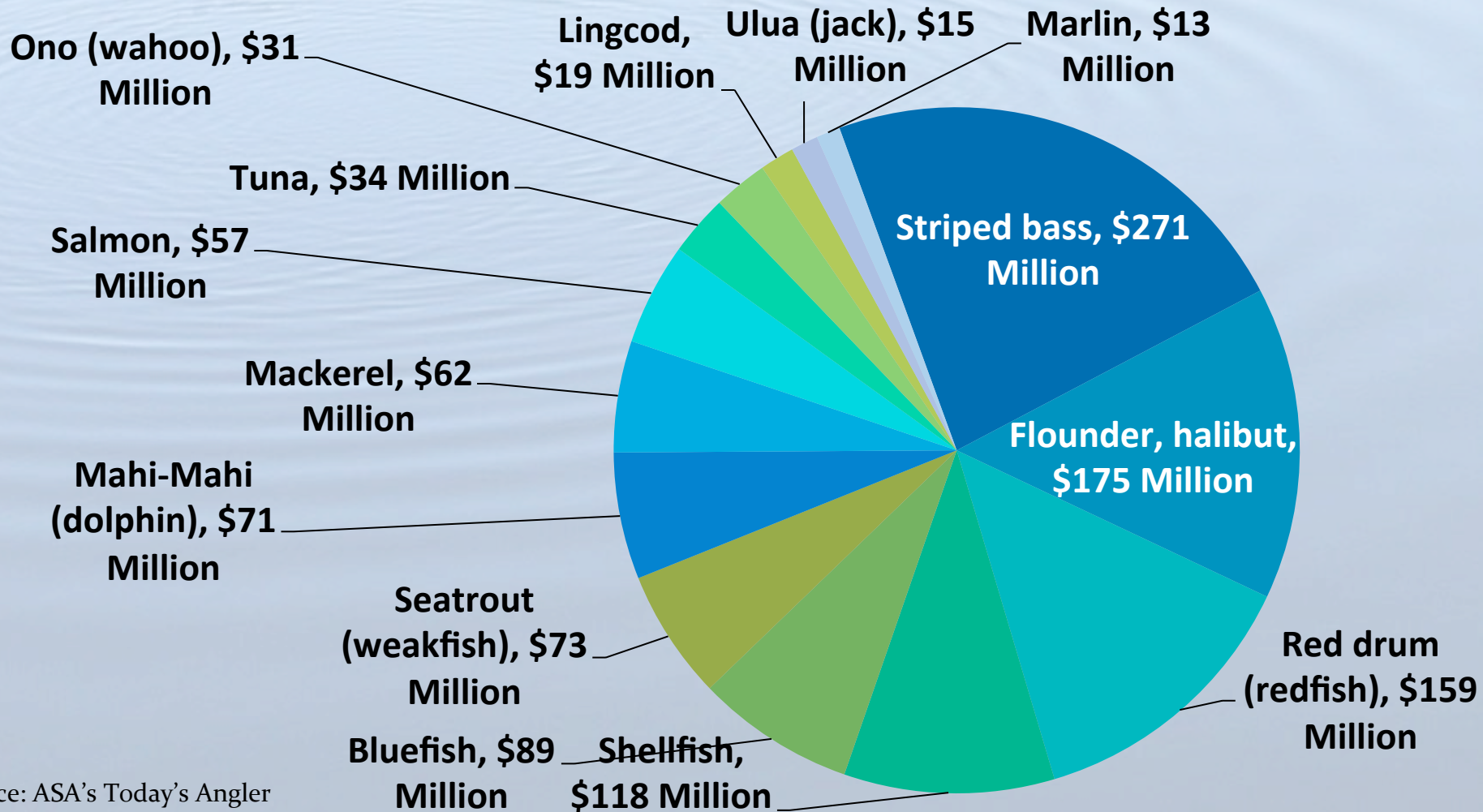


Available from ASA's members' only website, 'Facts and Figures' section

Fishing Tackle Sales by Freshwater Species = \$4.2 Billion



Fishing Tackle Sales by Saltwater Species = \$1.6 Billion



Avid Angler vs. Average Angler

“Avid angler” = top 10 percent of anglers based on the number of days fished annually.

Avid Angler vs. Average Angler

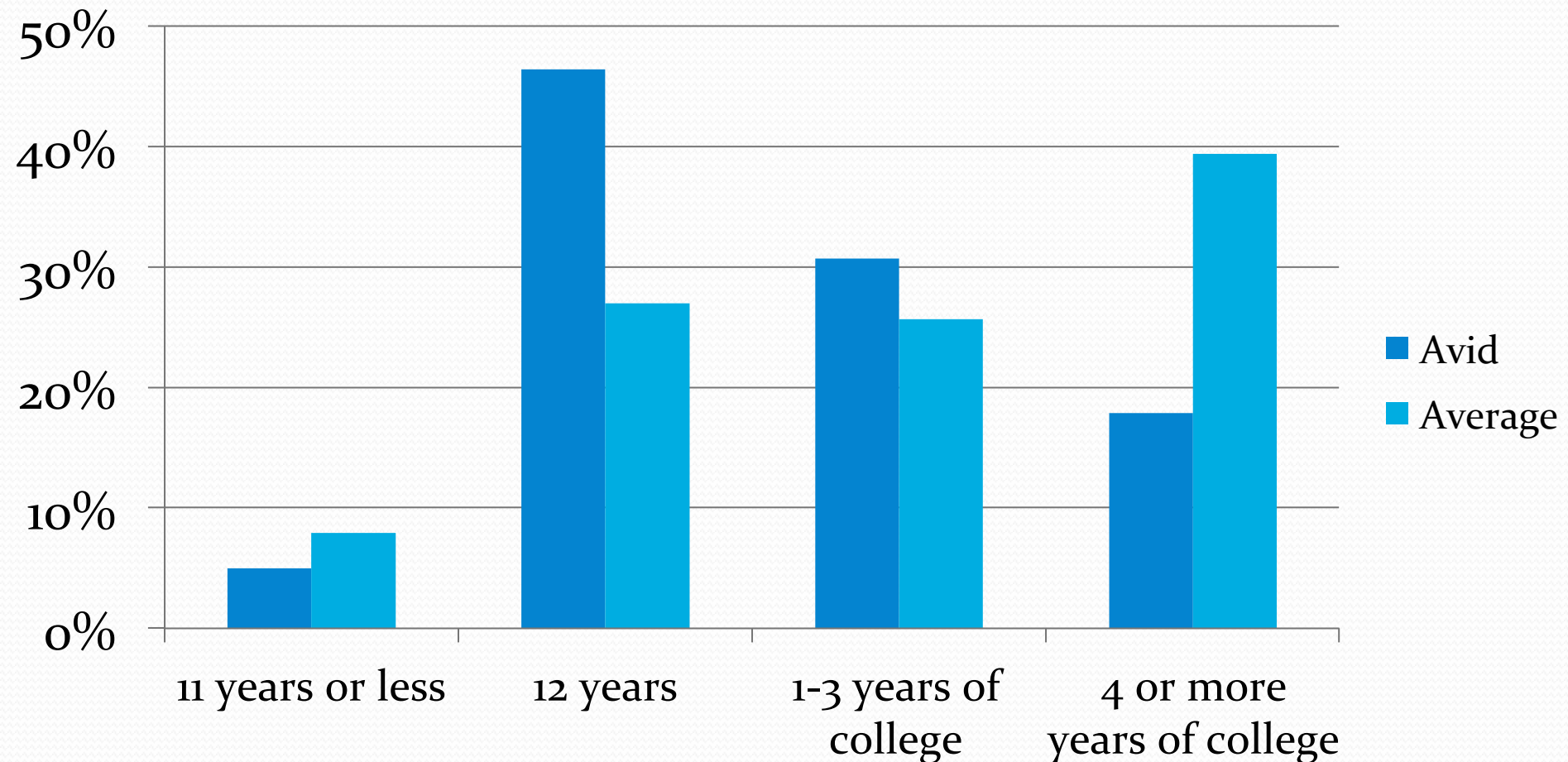
Demographics

Age of SALTWATER Anglers for Avid vs. Average Anglers

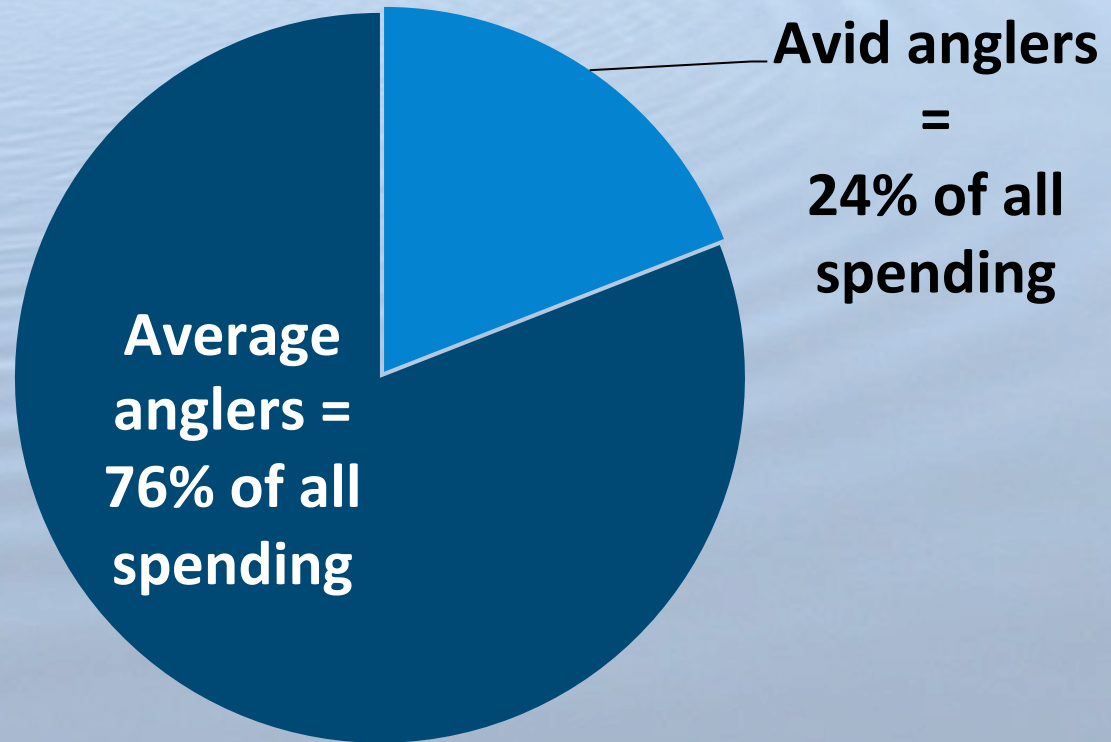
	Avid	Average
Under 18	2.9%	2.6%
18 to 24	6.1%	6.0%
25 to 34	10.1%	16.9%
35 to 44	29.6%	17.7%
45 to 54	20.7%	24.3%
55 to 64	19.0%	19.5%
65 and older	11.6%	13.0%
Total	100.0%	100.0%

Avid Angler vs. Average Angler Demographics

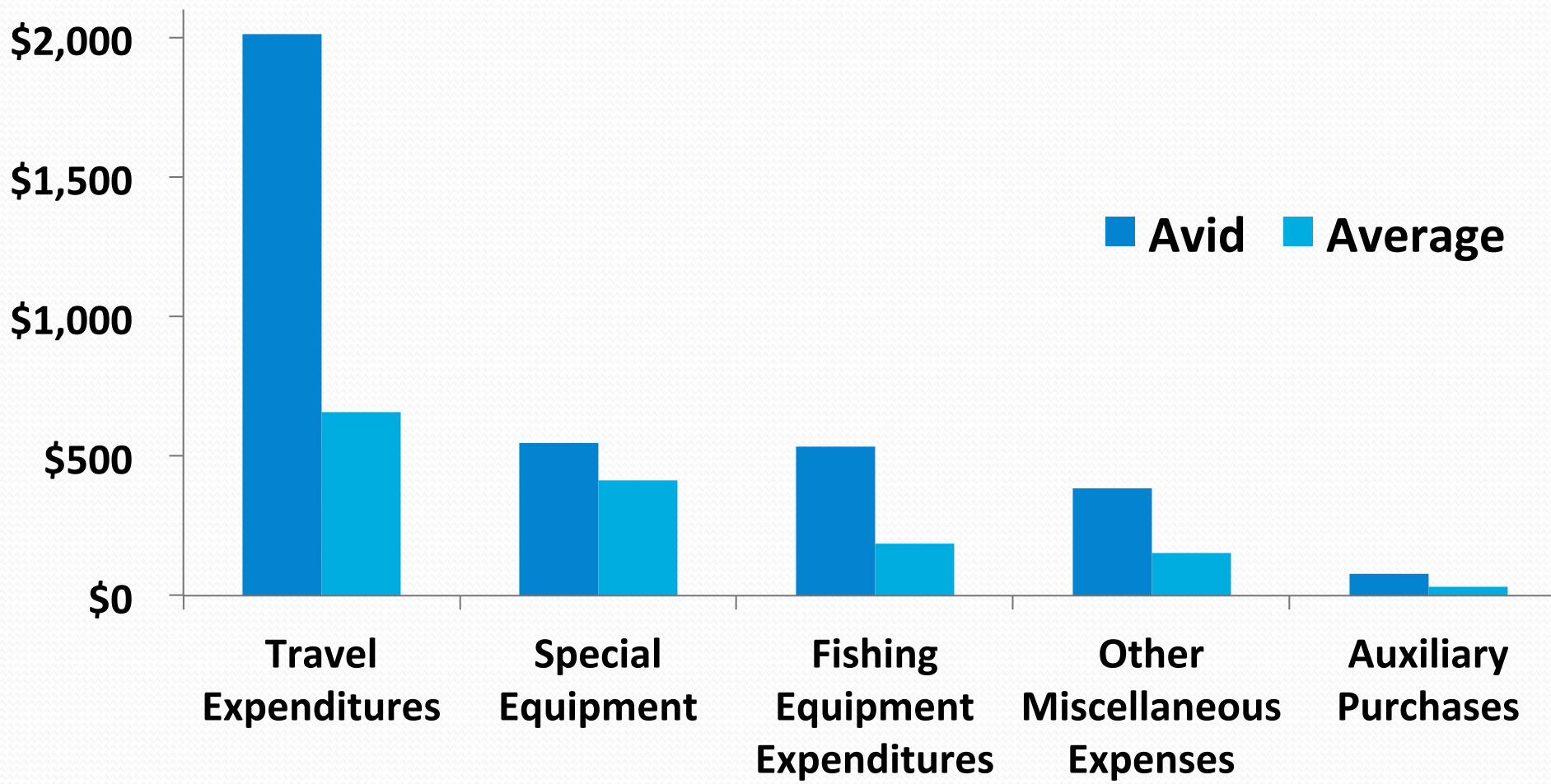
Education Level of SALTWATER Anglers for Avid vs. Average Anglers



Avid anglers spend 2.5x more vs. average anglers



Differences Per Angler



Correction:

- Page 15:
 - Middle column = 2011
 - Right column = 2012

Private label and internet sales info on ASA members' only website

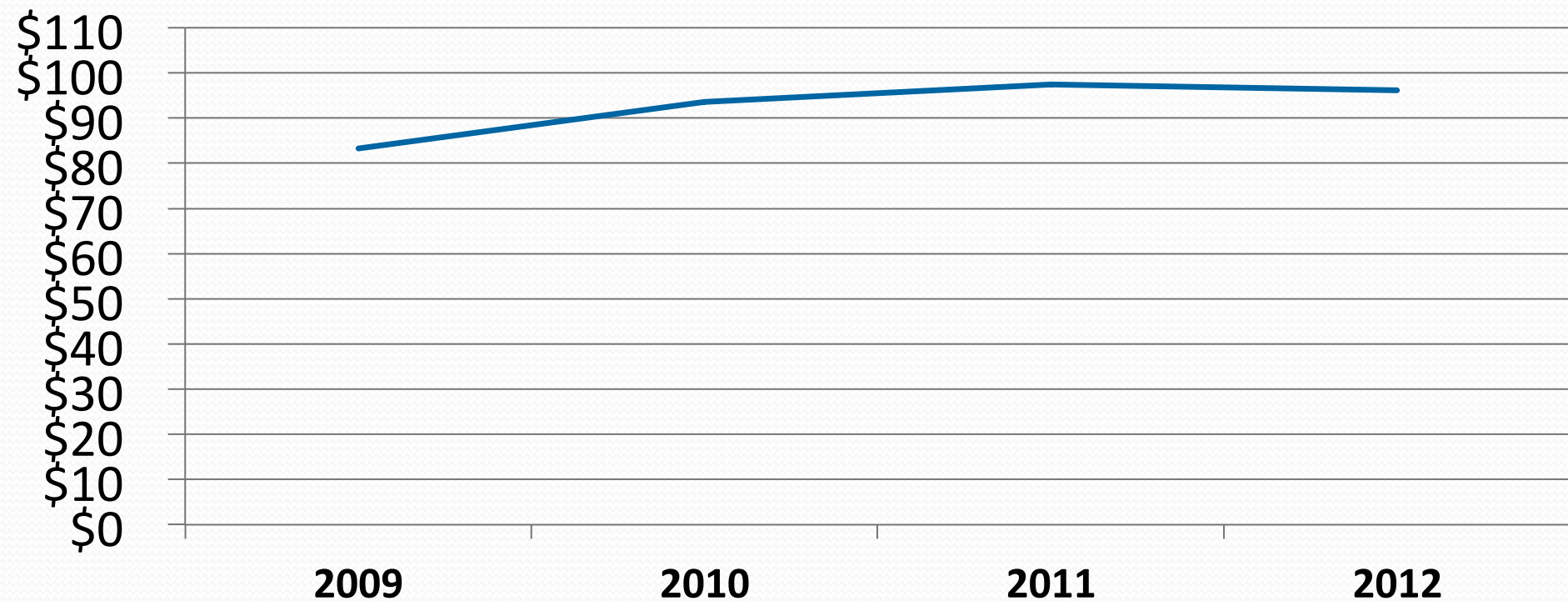
Background



Average Amount Spent Per Purchase 2009-2012

Avg. Amount Paid	2009	2010	2011	2012
Rods	\$83.29	\$93.60	\$97.55	\$96.19

Rods = 15.5%



In addition to page 15...

Average Amount Paid

2009-2012

22 of 30 tackle categories have seen spending increases, including:

- **Leaders = 45.3%**
- **Rigs = 23.5%**
- **Reels = 13.9%**
- **Line = 11.9%**
- **Hard Bait = 8.5%**
- **Combos = 6.4%**
- **Soft Bait = 0.4%**

New Report Available From Southwick Associates



Size of the 2012 Sportfishing Market

*Estimated retail amount spent on fishing
equipment in 2012*

Produced by:
Southwick Associates, Inc.
P.O. Box 6435
Fernandina Beach, FL 32035
904-277-9765

Fishing Line Sales

	Total Estimated 2012 U.S. Market
Fishing shows or expos	\$3,958,190
General Sporting Goods (Sports Authority, Dick's)	\$111,505,819
Local shop (bait tackle, specialty fly shop)	\$99,371,707
Mass Merchant (Wal-Mart, K-Mart, Sam's Club)	\$81,542,976
Outdoor Specialty Store (Bass Pro, Cabela's)	\$161,498,595
Printed Catalog (Bass Pro and Cabela's)	\$10,722,522
Used	\$3,516,371
Website (Cabela's, Bass Pro)	\$81,599,457
Other	\$13,851,744
Total fishing line market	\$567,567,381

A fishing tackle store display featuring various lures and packages on a grey pegboard. The lures include minnow slabs, crocodile lures, and other artificial baits. Some packages are labeled 'Krocodile' and 'Minnow Slab'. The background is a light blue and white patterned border.

***Want to Compare Your
Business to Industry
Averages?***

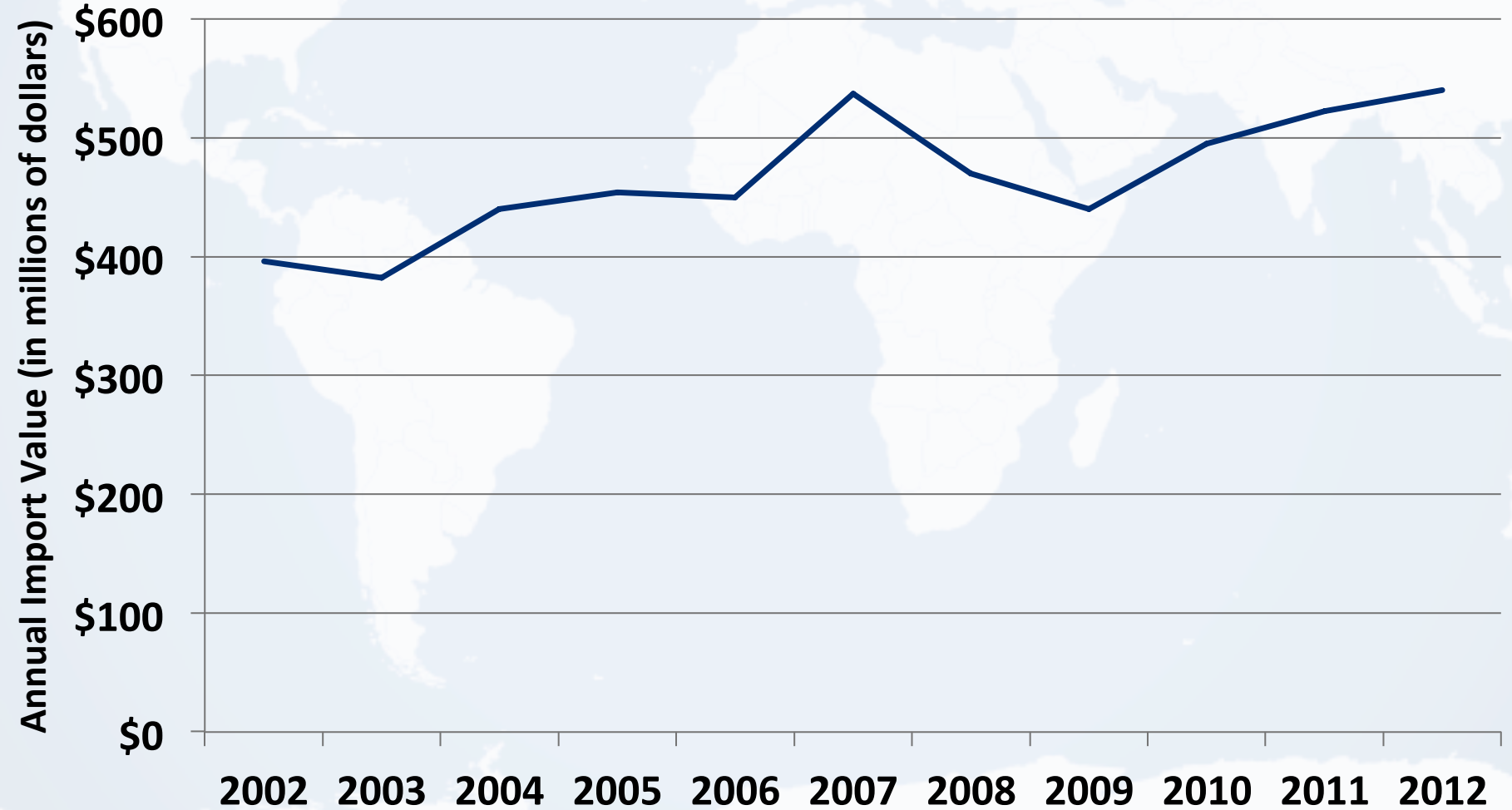
ASA Monthly Wholesale Tackle Shipments Index

- A free member service
- Must return survey to receive results
- Each month, you will know:
 - 1) Percent change in shipments compared to the same month, last year.
 - 2) Percent change in year-to-date shipments
 - 3) The rolling 12 month average
 - 4) Percent of trade represented by the results
 - 5) Comments about factors driving recent sales trends

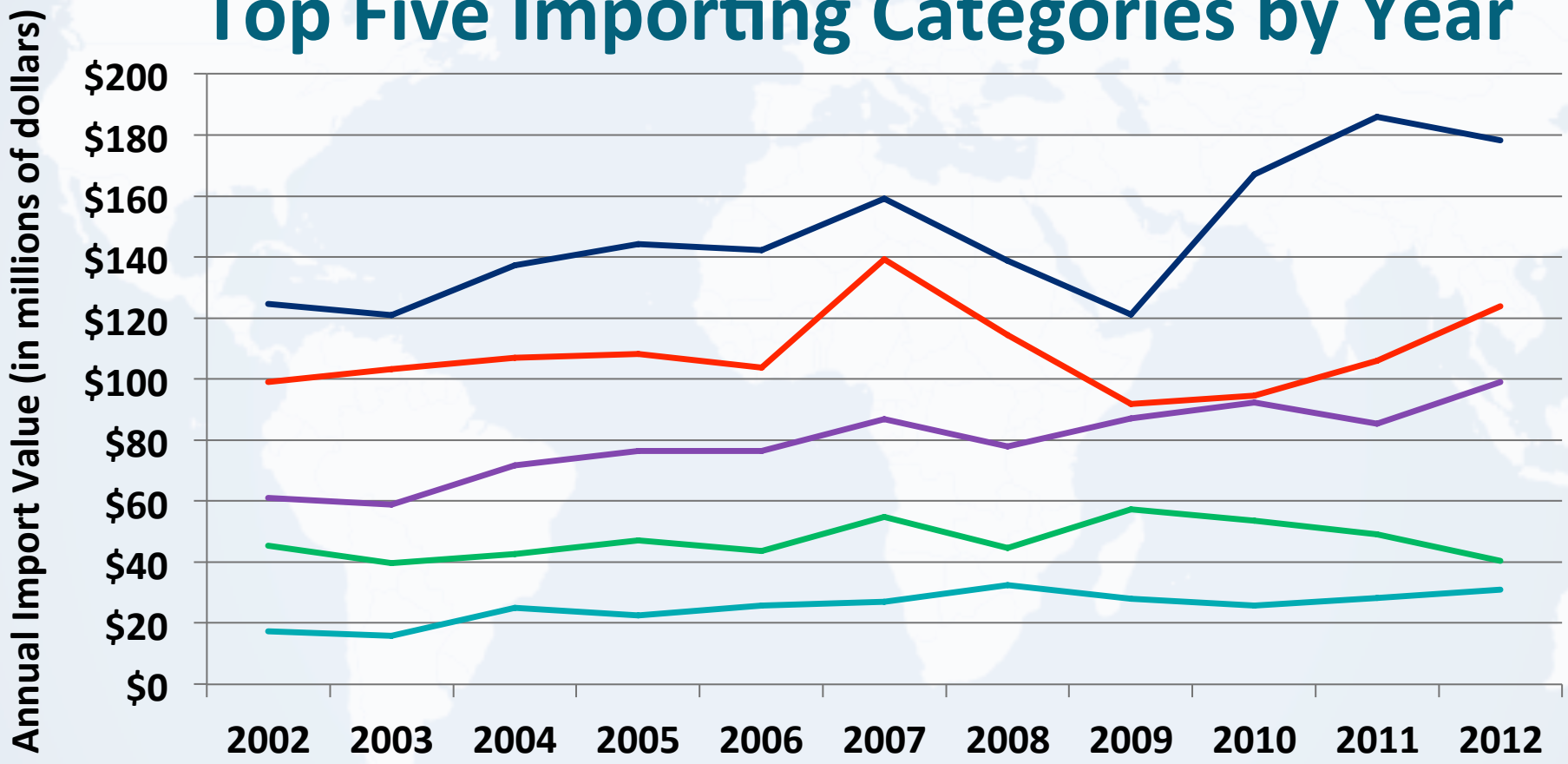
Import Trends



Total Imports of All Categories by Year



Top Five Importing Categories by Year



- Fishing Reels valued over \$8.45
- Fishing Rods
- Artificial Baits
- Fishing Reels valued over \$2.70 and under \$8.45
- Fish Hooks

Trends of China Fishing Tackle

Import Categories Led by China:

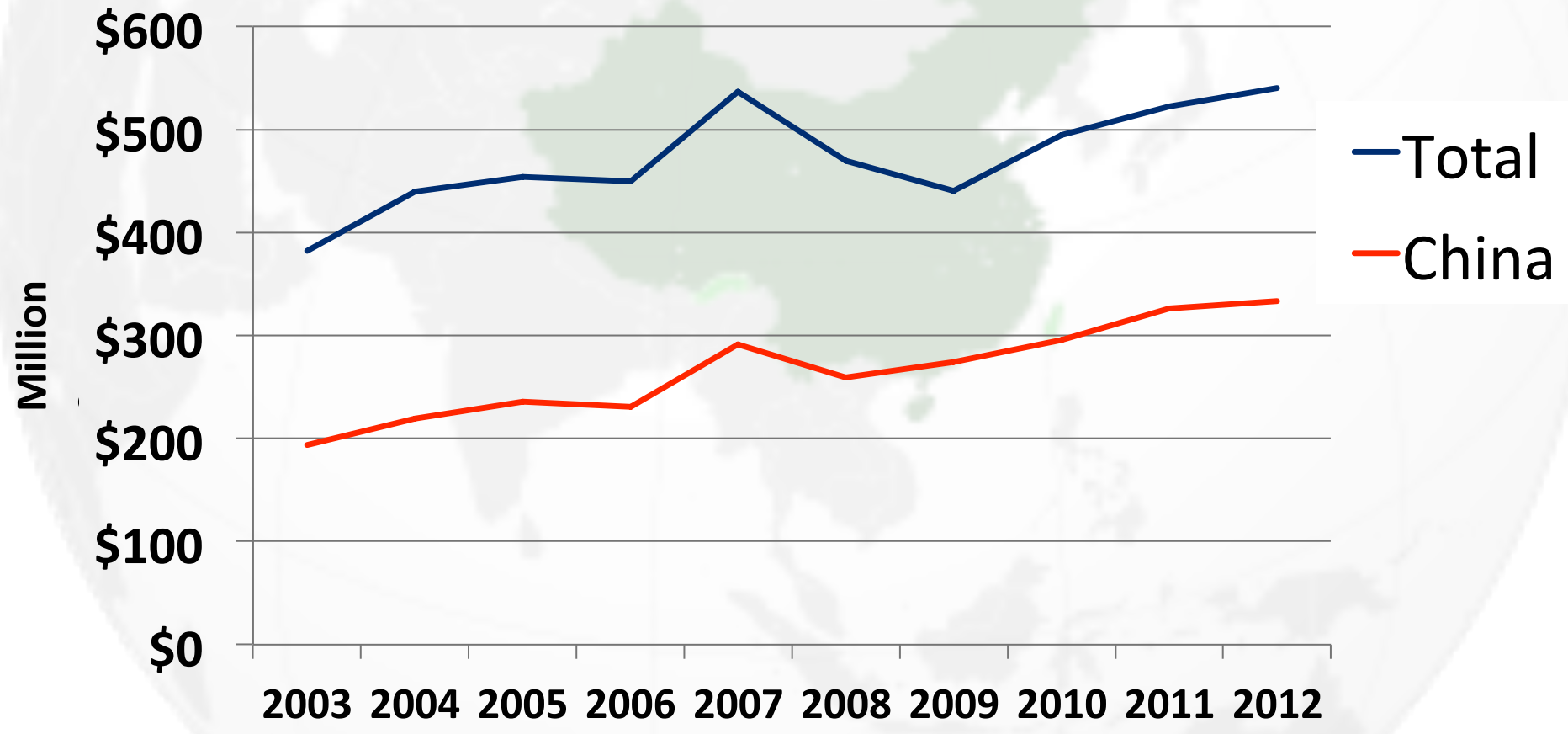
2002 - 7 out of 12 categories

2007 - 8 out of 12 categories

2012 – **11 out of 12** tackle categories

China's Imports Compared To All Imports

Imports Total	2003	2012
China	\$193.4 million	\$333.2 million
Total	\$382.2 million	\$540.0 million
Percent of Total	51%	62%

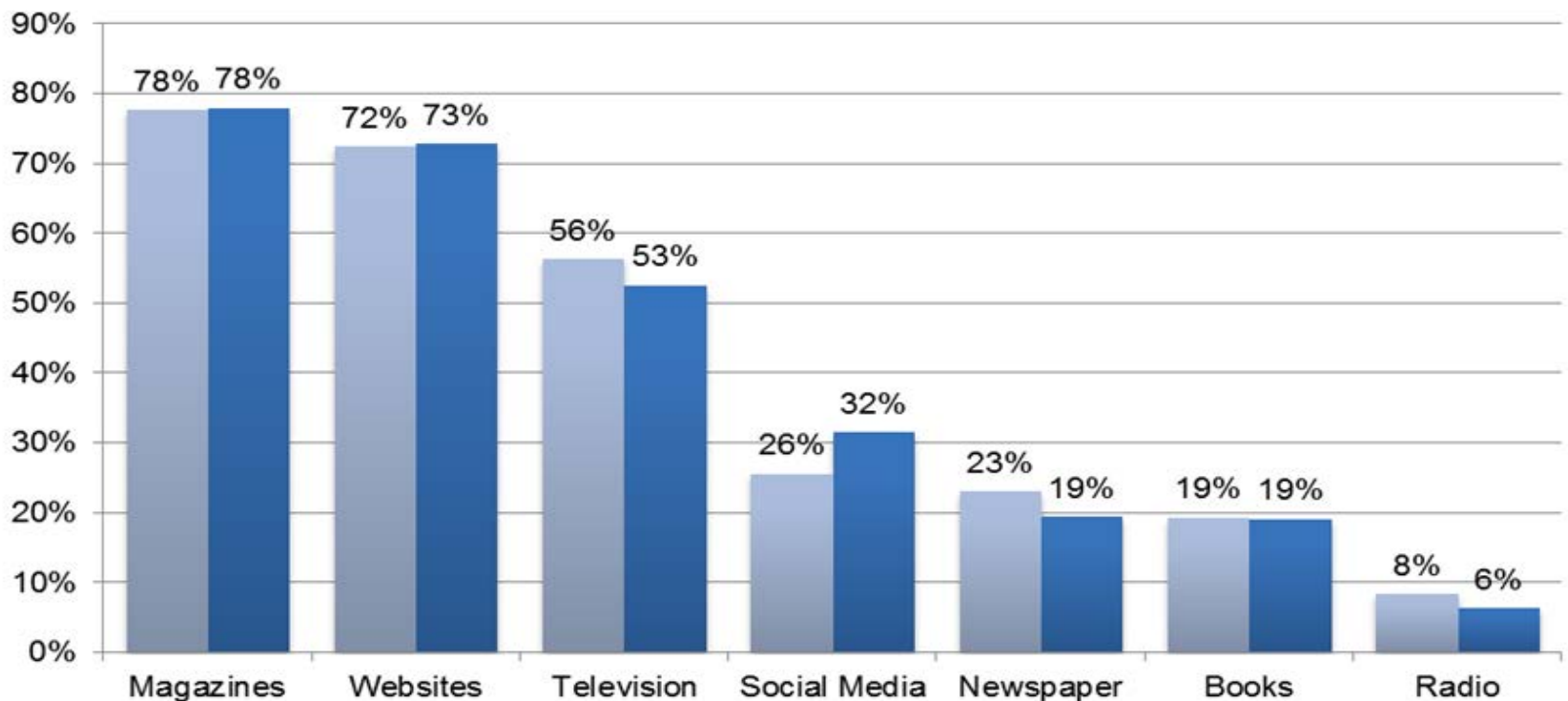


Background



Angler's Media Consumption

Anglers' Preferred Outdoor Media* by Quarter



*by AnglerSurvey respondents who fished during the past year

■ Q2 2012

■ Q2 2013

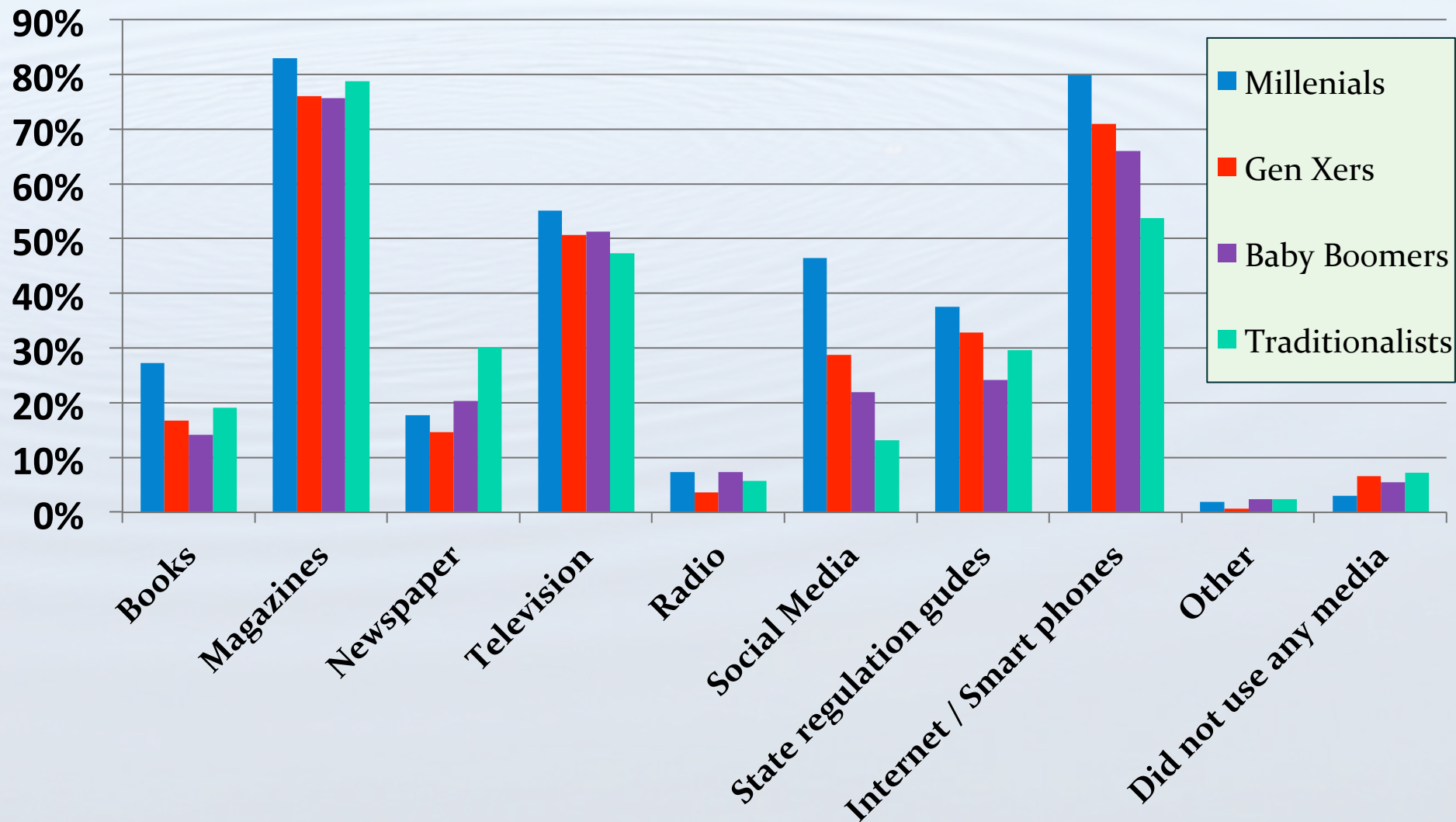


SOUTHWICK
ASSOCIATES

FISH AND WILDLIFE ECONOMICS AND STATISTICS

BETTER INFORMATION. BETTER DECISIONS.

Media Use by Generation, April through June 2013

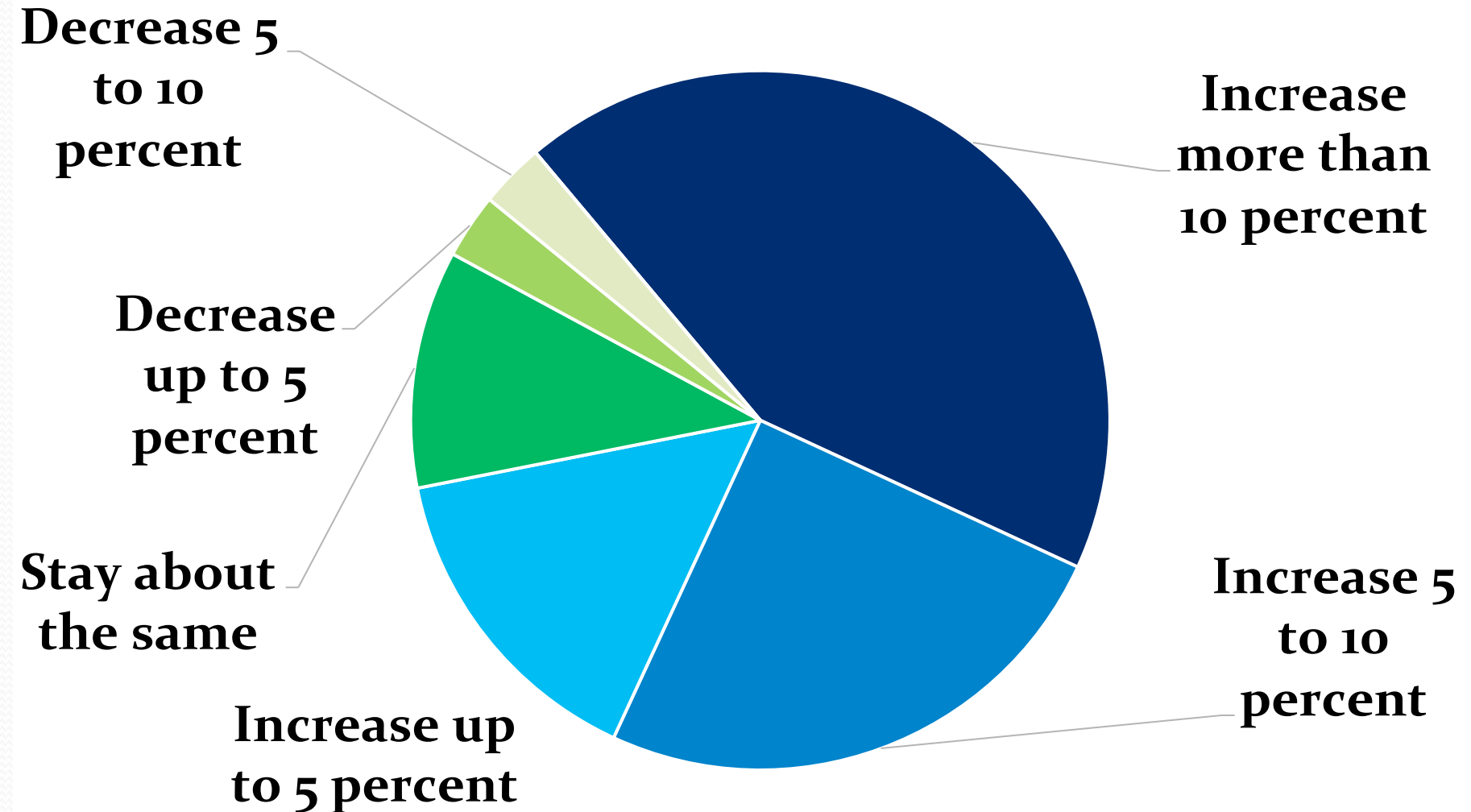


Looking Forward

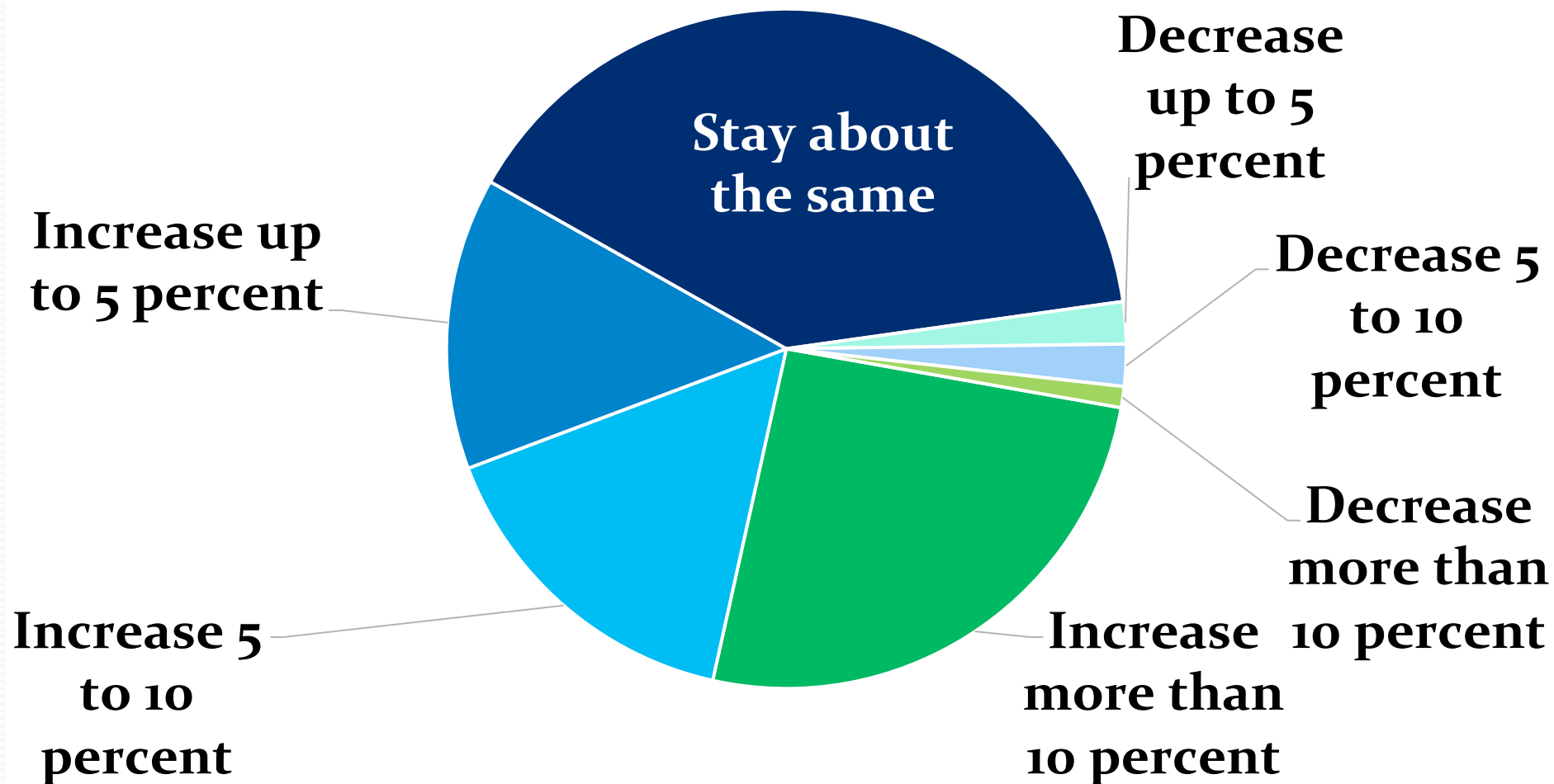
ASA's Business Outlook Survey

- ✓ **Annual**
- ✓ **Tracks expectations of next 12 months**
- ✓ **2/3's of respondents are manufacturers, rest are media/ reps/ wholesale**
- ✓ **RESULTS:**

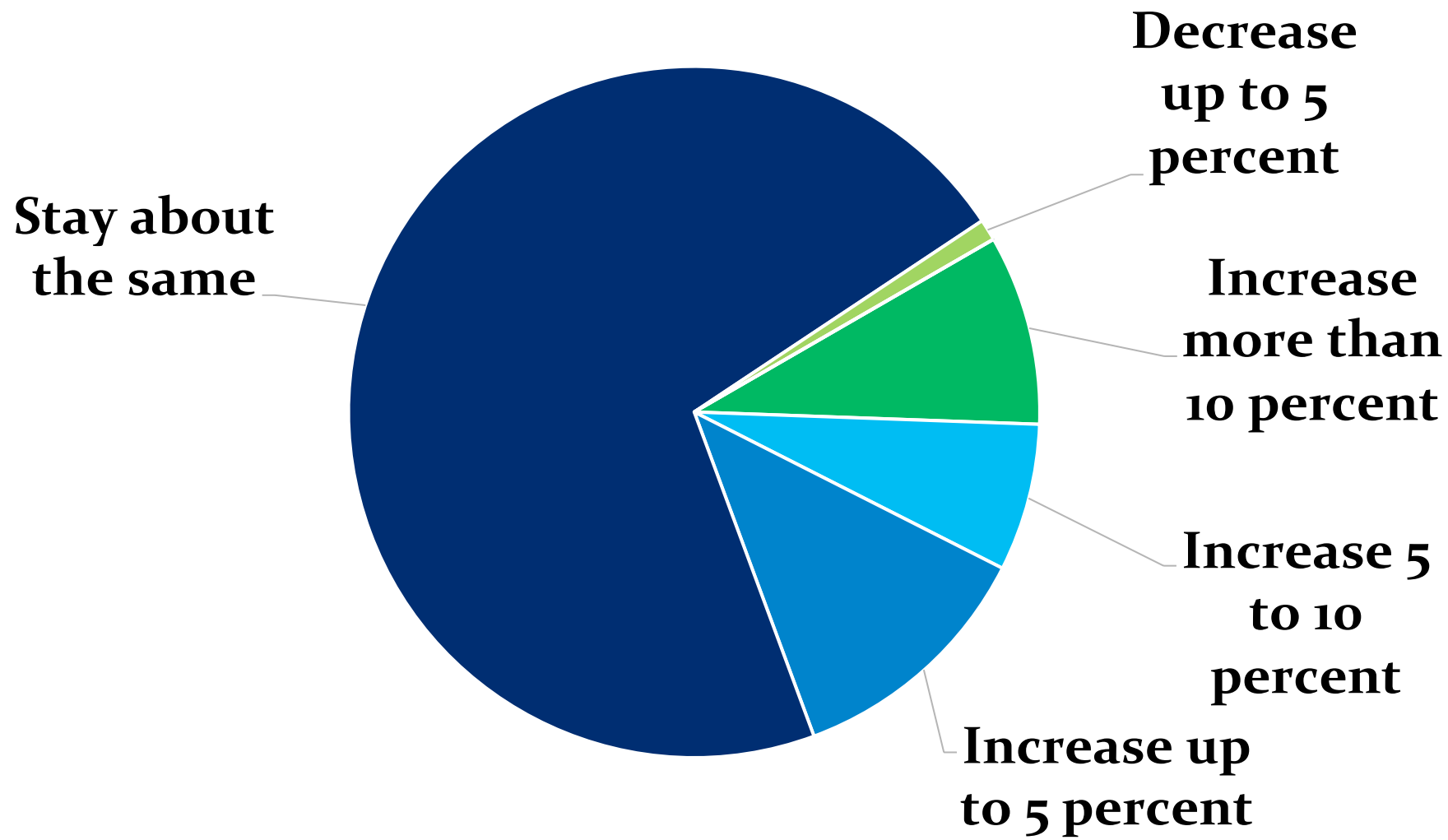
Over the next 12 months, what do you expect to happen with your company's sales?



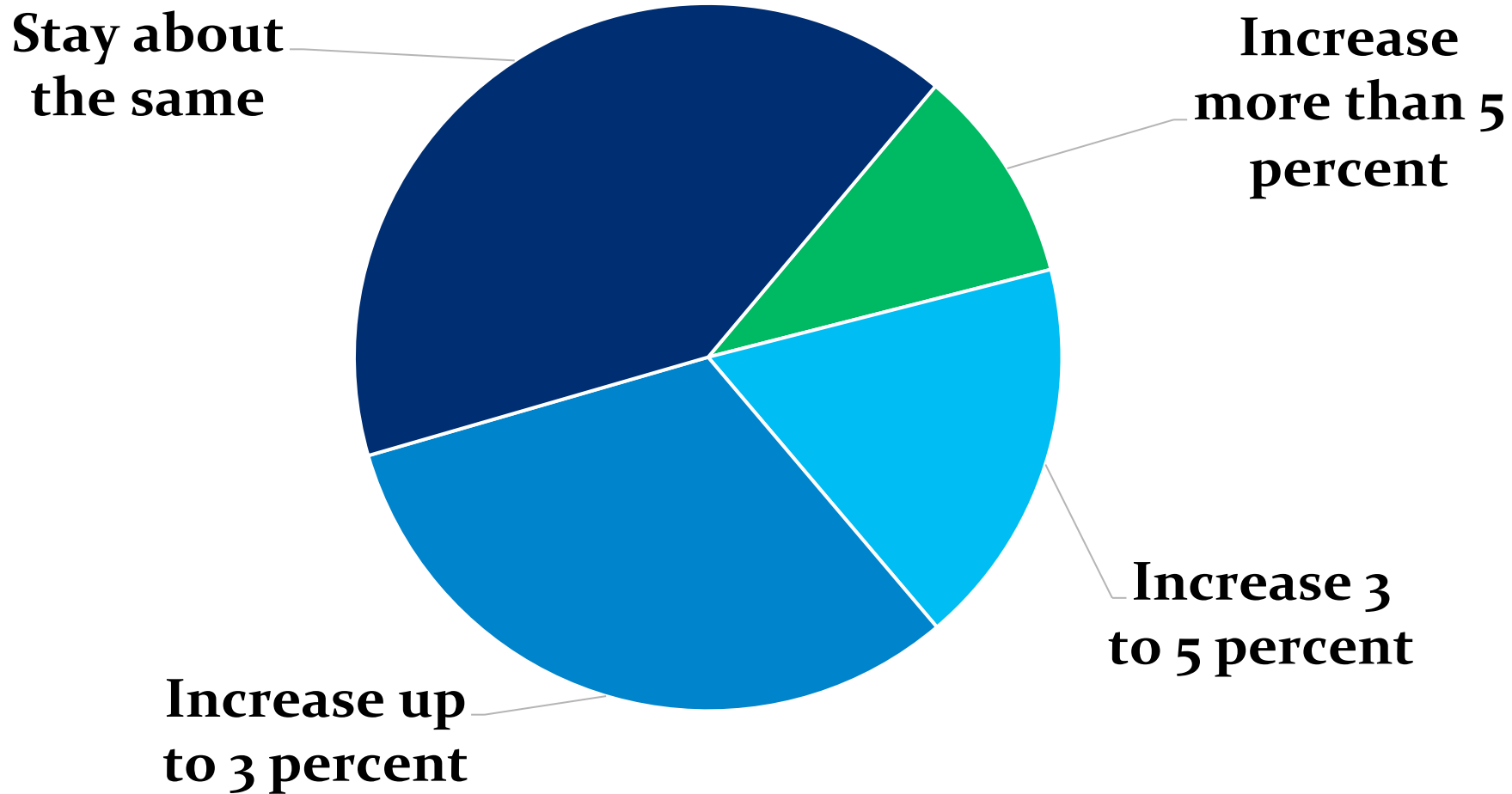
Over the next 12 months, what are your company's capital investment plans?



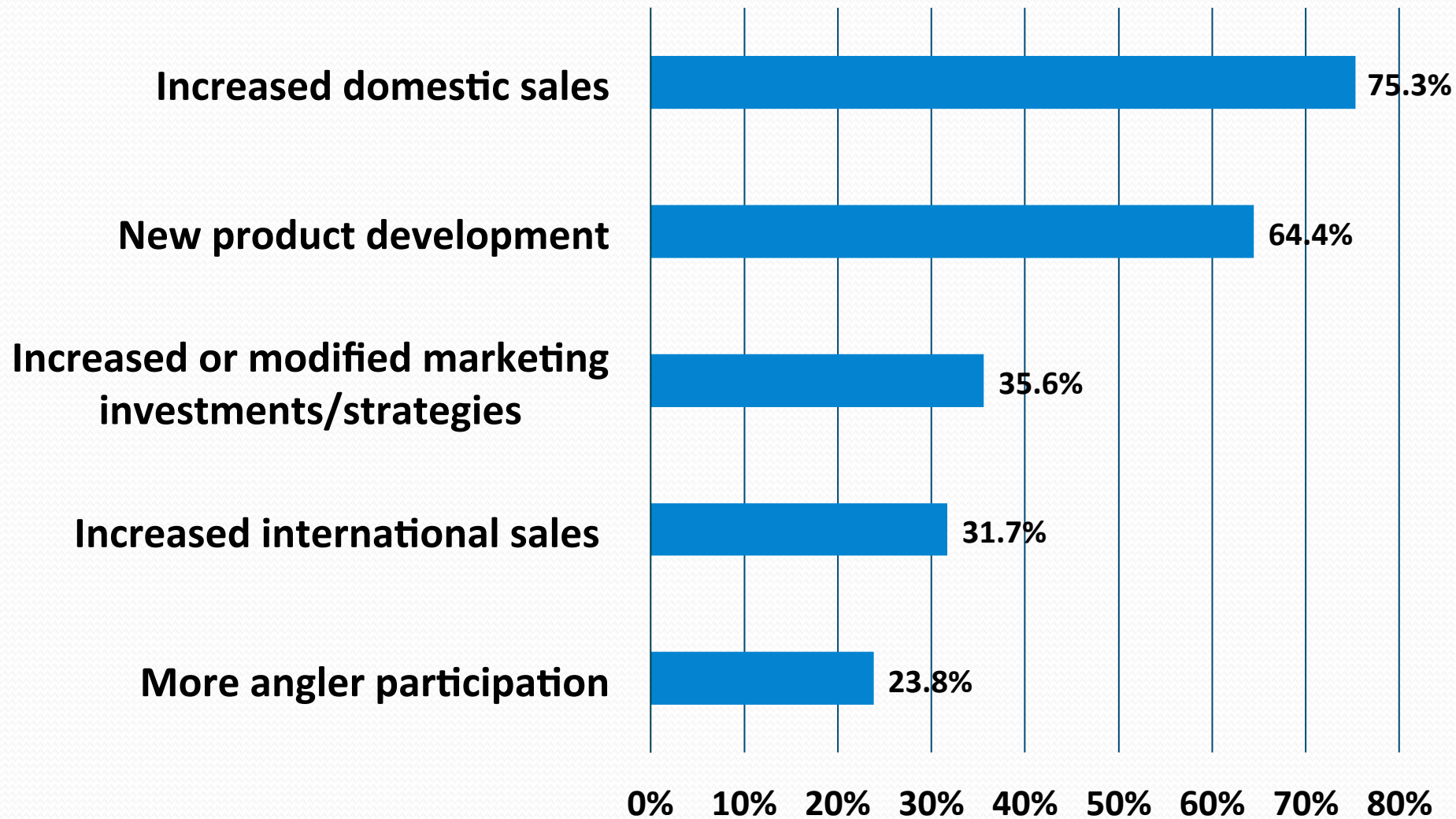
Over the next 12 months, what do you expect in terms of full-time employment?



Over the next 12 months, what are your expectations regarding employee wages?



What are the primary drivers of your company's business development/expansion plans?



Coming Soon From ASA:

- A. More insights on anglers' "churn" rates and why many quit fishing
- B. Tentative: international market statistics
- C. Your info needs? Let the Data & Statistics Committee hear from you!

When Looking for Market Information:

- www.asafishing.org: *Facts & Figures*
- Contact Southwick Associates:
Rob@southwickassociate.com – or –
(904) 277-9765

Thank you!!

