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/
Get to Know www.ASAfishing.org!

American Sportfishing Association
Leading the Way for Sportfishing’s Future

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

Recreational Fishing – An Economic Powerhouse

Recent economic studies have shown that recreational fishing is a significant and growing economic activity. If sportfishing were a corporation, the amount spent by anglers to support the sport would rank it number 1 on the Fortune 500™ list. The economic contributions of fishing have grown steadily over the last several decades. This page contains a range of recreational fishing-related information and data from angler surveys, economic impacts, 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.
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

Source: RBFF-ASA Fishing License Sales Index
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 (_/+)

Source: ASA-AFWA grant research
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 (+)

Source: ASA-AFWA grant research
U.S. Retail Tackle Market: Size & Trends
Tackle is just a part of the sportfishing economy

All sportfishing expenditures = $47.7 billion

Source: USFWS
Type of Tackle Sold:

- Rods, reels and components
- Lures, flies, etc
- Line, leaders
- Terminal tackle
- Electronics
- Ice tackle
- Other

2011 U.S. Tackle Sales = $6.1 billion

Source: USFWS
New Report for Members Only!

Today’s Angler

Prepared for:
American Sportfishing Association
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September 2013

Available from ASA’s members’ only website, ‘Facts and Figures’ section
Fishing Tackle Sales by Freshwater Species = $4.2 Billion

- Bass (large & small mouth), $1,084 Billion
- Crappie, $449 Million
- Panfish (sunfish, perch, etc), $440 Million
- Walleye, $310 Million
- Salmon, $134 Million
- Catfish, bullheads, $352 Million
- Bass (white, striped, hybrid), $270 Million
- Pike, pickerel, muskie, $75 Million
- Sauger*, $14 Million
- Anything, $130 Million

Source: ASA’s Today’s Angler
Fishing Tackle Sales by Saltwater Species = $1.6 Billion

- Striped bass, $271 Million
- Flounder, halibut, $175 Million
- Red drum (redfish), $159 Million
- Mahi-Mahi (dolphin), $71 Million
- Salmon, $57 Million
- Tuna, $34 Million
- Mackerel, $62 Million
- Seatrout (weakfish), $73 Million
- Bluefish, $89 Million
- Shellfish, $118 Million
- Ono (wahoo), $31 Million
- Lingcod, $19 Million
- Ulua (jack), $15 Million
- Marlin, $13 Million

Source: ASA’s Today’s Angler
Avid Angler vs. Average Angler

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

Source: ASA’s Today’s Angler
# Avid Angler vs. Average Angler Demographics

Age of SALTWATER Anglers for Avid vs. Average Anglers

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Avid</th>
<th>Average</th>
</tr>
</thead>
<tbody>
<tr>
<td>Under 18</td>
<td>2.9%</td>
<td>2.6%</td>
</tr>
<tr>
<td>18 to 24</td>
<td>6.1%</td>
<td>6.0%</td>
</tr>
<tr>
<td>25 to 34</td>
<td>10.1%</td>
<td>16.9%</td>
</tr>
<tr>
<td>35 to 44</td>
<td>29.6%</td>
<td>17.7%</td>
</tr>
<tr>
<td>45 to 54</td>
<td>20.7%</td>
<td>24.3%</td>
</tr>
<tr>
<td>55 to 64</td>
<td>19.0%</td>
<td>19.5%</td>
</tr>
<tr>
<td>65 and older</td>
<td>11.6%</td>
<td>13.0%</td>
</tr>
<tr>
<td>Total</td>
<td>100.0%</td>
<td>100.0%</td>
</tr>
</tbody>
</table>
Avid Angler vs. Average Angler Demographics

Education Level of SALTWATER Anglers for Avid vs. Average Anglers

- 11 years or less
- 12 years
- 1-3 years of college
- 4 or more years of college

Avid
Average

Chart showing education levels of avid and average anglers.
Avid anglers spend 2.5x more vs. average anglers

Average anglers = 76% of all spending

Avid anglers = 24% of all spending
Correction:

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

Private label and internet sales info on ASA members’ only website
### Average Amount Spent Per Purchase 2009-2012

<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Rods</td>
<td>$83.29</td>
<td>$93.60</td>
<td>$97.55</td>
<td>$96.19</td>
</tr>
</tbody>
</table>

Rods = 15.5%
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

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

Annual Import Value (in millions of dollars)

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

<table>
<thead>
<tr>
<th>Imports Total</th>
<th>2003</th>
<th>2012</th>
</tr>
</thead>
<tbody>
<tr>
<td>China</td>
<td>$193.4 million</td>
<td>$333.2 million</td>
</tr>
<tr>
<td>Total</td>
<td>$382.2 million</td>
<td>$540.0 million</td>
</tr>
<tr>
<td>Percent of Total</td>
<td>51%</td>
<td>62%</td>
</tr>
</tbody>
</table>

![Import Comparison Chart](chart.png)
Background
Angler’s Media Consumption

Anglers' Preferred Outdoor Media* by Quarter

*by AnglerSurvey respondents who fished during the past year

Q2 2012  Q2 2013
Media Use by Generation, April through June 2013

In addition to pages 22-23
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?

- Increase more than 10 percent
- Increase 5 to 10 percent
- Increase up to 5 percent
- Stay about the same
- Decrease up to 5 percent
- Decrease 5 to 10 percent
Over the next 12 months, what are your company's capital investment plans?

- **Stay about the same**
- **Increase up to 5 percent**
- **Increase 5 to 10 percent**
- **Decrease up to 5 percent**
- **Decrease 5 to 10 percent**
- **Decrease more than 10 percent**
- **Decrease more than 10 percent**
Over the next 12 months, what do you expect in terms of full-time employment?

- Stay about the same
- Increase up to 5 percent
- Increase more than 10 percent
- Increase 5 to 10 percent
- Decrease up to 5 percent
Over the next 12 months, what are your expectations regarding employee wages?

- Stay about the same
- Increase more than 5 percent
- Increase up to 3 percent
What are the primary drivers of your company's business development/expansion plans?

- Increased domestic sales: 75.3%
- New product development: 64.4%
- Increased or modified marketing investments/strategies: 35.6%
- Increased international sales: 31.7%
- More angler participation: 23.8%
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!!