

Winter 2010

Welcome to the [Southwick Associates Newsletter](#) focusing on economic, business and statistics related to fish and wildlife and their associated outdoor recreations.

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[HunterSurvey.com](#) Reports U.S. Hunters Significantly Support International Economies

Southwick Associates estimates that, over the past three years, more than 500,000 people hunted outside of the U.S. When U.S. hunters travel, they spend big bucks, dropping an average of \$6,718 outside of the U.S. as part of their hunting activities. Specifically, 29% of U.S. hunters spent \$2,001 to \$5,000 per trip while 27.6% reported expenditures between \$5,001 and \$10,000 per trip outside of the U.S. More than 24% hunted outside the U.S. for less than \$2,000, while 19 % spent more than \$10,000. These dollars are an important source of revenue for many countries, totaling \$3.6 billion in new economic injections over the past three years.

So where do these dollars go? The top destination is not surprising. Considering its convenience and high-quality hunting opportunities, Canada attracted nearly 47 percent of U.S. international hunters. Other destinations include:

Africa – 23% of respondents
Mexico – 9% of respondents
South America – 7.6% of respondents
Europe – 5.5% of respondents, and
Australia – 5.5% of respondents

When asked, 2.6 % of this country's 12 million hunters indicate they plan to hunt outside the U.S in the next year, while 5.7 percent, over 700,000 hunters, plan to do so in the next two years.

[Hunter and Target Shooter Benchmark Survey: Major New Finding Released](#)

At the 2010 SHOT Show, Southwick Associates announced major new estimates about the number of Americans participating in target shooting each year. As part of its effort to develop new weighting procedures for [HunterSurvey.com](#) and [AnglerSurvey.com](#), new information came to light. Results of this research showed that 5.2% of Americans hunted in 2008 while 4.5% participated in at least one form of target shooting.

Number of People Who Hunted in 2008 = 11,969,007 (5.2% of U.S. population 18+ years of age)

Number of Target Shooters, 2008 = 10,357,794 (4.5% of U.S. pop.)

Other important findings:

- 25.7% of hunters and target shooters belong to a conservation organization and 74.3% do not.
- Youth (18 to 24 years old) are participating at lower rates and baby boomers (45 to 64 years old) participate at higher rates. Baby boomers are carrying the hunting and shooting industry (see below). More recruitment of younger participants is needed.

Age

	N	% Who Hunt &/or Shoot*	% of U.S. Population
18 to 24	15	6.9%	12.6%
25 to 44	68	31.3%	36.4%
45 to 64	104	47.9%	34.5%
65 and older	30	13.8%	16.5%
Total	217	100.0%	100.0%

The results come from an in-house examination of U.S. households conducted in part to update the weighting system for Southwick Associate's online market tracking services AnglerSurvey and HunterSurvey/TargetShootingSurvey. For more information on these services, contact Donna@southwickassociates.com

Top Fishing, Hunting and Target Shooting Equipment Brands for 2009

Southwick Associates' compiled the following data for the brands anglers, hunters and target shooters preferred most in 2009. These lists were compiled based on surveys completed by 34,185 anglers and 44,734 hunters and target shooters that voluntarily participated in AnglerSurvey.com, HunterSurvey.com and TargetshootingSurvey.com polls, respectively. In 2009, the top angler brands were:

- Top rod brand: Shakespeare Ugly Stik (16.4% of all purchases)
- Top reel brand: Shimano (23.0% of all purchases)
- Top rod and reel combo brand: Shakespeare (25.7% of all purchases)
- Top fishing line producer: Pure Fishing's Berkley line (Trilene, Fireline, Big Game, Vanish) (42.6% of all purchases)
- Top hard bait brand: Rapala (30.6% of all purchases)
- Top soft bait brand: Zoom (16.8% of all purchases)
- Top spinner bait brand: Strike King (16.6% of all purchases)
- Top hook brand: Eagle Claw (34.5% of all purchases)
- Top sinker brand: Bullet Weight (19.0% of all purchases)
- Top fly rod brand: Sage (16.7% of all purchases)
- Top fly reels brand: Orvis (11.1% of all purchases)
- Top fly combo brand: St. Croix (18.0% of all purchases)
- Top fly line brand: Scientific Angler (28.8% of all purchases)
- Top fly brand: Orvis and Cabelas tied (11.0% of all purchases, each)
- Top fly leader brand: Rio (28.4% of all purchases)
- Top fly tying material brand: White River (60.5% of all purchases)
- Top fish finder or sonar brand: Humminbird (42.9% of all purchases)
- Top tackle box brand: Plano (55.8% of all purchases)
- Top landing net brand: Frabill (20.2% of all purchases)
- Top fishing knife brand: Rapala (22.6% of all purchases)

The top hunting and target shooting brands in 2009 were:

- Top rifle brand: Remington (16.5% of all purchases)
- Top shotgun brand: Remington (22% of all purchases)
- Top muzzleloader brand: Thompson Center (29.5% of all purchases)
- Top handgun brand: Sturm, Ruger (16.6% of all purchases)
- Top scope for firearms: Bushnell (17.3% of all purchases)
- Top rifle ammunition brand: Remington (28.8% of all purchases)
- Top shotgun ammunition brand: Winchester (32.0% of all purchases)
- Top handgun ammunition brand: Winchester (22.0% of all purchases)
- Top blackpowder brand: Pyrodex (51.5% of all purchases)
- Top balls, bullets, or shot brand: Hornady (26.2% of all purchases)
- Top bow brand: BowTech (14.8% of all purchases)
- Top arrow brand: Easton (30.3% of all purchases)
- Top fletching brand: Bohning (30.3% of all purchases)
- Top broadhead brand: Muzzy (25.3% of all purchases)
- Top archery target brand: The Block (22.3% of all purchases)
- Top decoy brand: Flambeau (15.7% of all purchases)
- Top game call brand: Primos (34.8% of all purchases)
- Top reloading bullet brand: Hornady (30.2% of all purchases)
- Top reloading primer brand: CCI (36.0% of all purchases)
- Top reloading powder brand: Hodgdon (36.5% of all purchases)
- Top binocular brand: Bushnell (19.5% of all purchases)
- Top holster brand: Uncle Mikes (21.4% of all purchases)
- Top knife brand: Buck (16.7% of all purchases)
- Top scent or scent covering brand: Scent-A-Way (24.5% of all purchases)
- Top shooting target brand: Shoot-N-C (38.9% of all purchases)
- Top clay brand: White Flyer (34.3% of all purchases)

You can stay abreast of consumer buying patterns and overall market trends by purchasing an annual subscription to Southwick Associates' monthly [AnglerSurvey](#) or [HunterSurvey/TargetShootingSurvey](#) reports. Reports are available for specific product categories including fishing rods, reels, line, lures, tackle, electronics, apparel, fly-fishing and ice fishing gear, and more. Year-end summary reports are available, too. To purchase, contact Donna Leonard at Donna@southwickassociates.com.

The Numbers Are In! Trends from 2009 Hunting and Fishing License Sales Announced

2009 Marks Significant Increase in Hunting License Sales

On behalf of the National Shooting Sports Foundation, Southwick Associates produced a hunting license sales index for January through December 2009. The index included license sales information from twelve states. Of those twelve, nine states recorded sales increases. A closer look at the numbers reveals that in the first half of 2009, license sales were up significantly. In fact, during the key turkey hunting month of April, license sales increased by approximately 17% over the same month in 2008. In June, when annual licenses go on sale in many states, sales posted a 16.2% increase. During the second half of 2009, when the bulk of hunting activity and license sales occur, sales continued to increase, though at a noticeably slower rate. Overall, 2009 hunting license sales increased 3.5% over 2008 levels.

Substantial Increase in Fishing License Sales

On behalf of the Recreational Boating and Fishing Foundation and the American Sportfishing Association, Southwick Associates also produced a fishing license sales index for 2009. In the twelve states that were included, fishing license sales increased overall by 4.7% compared to 2008. License sales increased at a faster rate in the first quarter of 2009 compared to the second quarter. Increases of 20% or more were common in the first quarter. During the second

quarter, when license sales often peak nationally, sales continued to increase. Sales eased in the later part of 2009, but not enough to prevent the largest single year increase seen in many years.

Analysis

The main cause for 2009 license sales increases is attributed by Southwick Associates to the slow economy. "In past recessions," reports Rob Southwick, President of Southwick Associates, "we have noted increases in hunting and fishing license sales. The increases seen in the latest recession have been greater than experienced in past recessions, which matches the severity of the recession. When workloads decrease, it appears many people have more time on their hands and elect to go fishing." Hunting and fishing may also be a lower cost alternative to other forms of recreation and entertainment that are commonly pursued during robust economic times. It is also possible that national marketing campaigns could be positively affecting license sales.

For more information, contact Rob@southwickassociates.com.

State Fish and Wildlife Agencies Most Trusted by Hunters and Anglers

In an October 2009 AnglerSurvey.com and HunterSurvey.com poll, Southwick Associates asked anglers and hunters which type of organization they trust most for accurate information regarding fish and wildlife conservation. Results showed that of the 2,771 anglers surveyed, 54.4% reported state fish and wildlife agencies were their most trusted source. Of the 3,378 hunters surveyed, 50.7% agreed. The second most trusted source, with 25.1% of anglers and 29.5% of hunters, was sport-fishing and hunting non-profit conservation groups.

"The results indicate that sportsmen and women want to hear from their state fish and wildlife agencies when it comes to fish and wildlife conservation issues," reported Donna Leonard of Southwick Associates. "Efforts to increase conservation awareness or behavior will have better success if state fish and wildlife agencies are involved."

Other results show that non-profit conservation groups not focused specifically towards fishing or hunting were preferred by 5.3% of anglers and 7.4% of hunters. Federal fish and wildlife agencies were rated as the most trusted source by 5% of anglers and 4.3% of hunters. Non-outdoor television programming and magazines ranked even lower.

For more information please contact Donna Leonard at donna@southwickassociates.com.

In Future Issues:

- [Sportfishing contributions to conservation and jobs in Costa Rica](#)
- [How many hunters and anglers buy a license in consecutive years? A peek inside state license data bases.](#)
- [Understanding the many types of hunters in the U.S. – results from a lifestyle segmentation analysis.](#)
- [A look into the rarely examined flyfishing market,](#)
- [And more...](#)

Southwick Associates, Inc. specializes in natural resource & environmental economic, business and statistical research. Our staff is comprised of economic, business and statistics professionals throughout the U.S. who have in-depth experience tracking the outdoor market and measuring the values, benefits and revenues possible from fish, wildlife, and water-related natural resources plus their associated industries. We can help clients better address many business, legal, legislative and public communication issues through the practical application of reliable and accurate economic information and statistics.

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