



## SAMPLE REPORT

# Media Usage Statistics for Anglers



Produced by:

Southwick Associates, Inc.

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## Introduction and Background

This report presents the results of a quarterly online consumer panel survey that tracks hunter, angler and shooters' media consumption preferences. The purpose of the Media Monitor is to measure use of outdoor media - namely magazine, television, and internet (social media) in the fishing, hunting and shooting communities and to match sportsmen's purchasing preferences to specific media programs and titles.

### Reliability

To overcome biases common to online surveys, the survey respondents are weighted to reflect the true population of U.S. anglers, shooters and hunters based on their activities, avidity, age, income, geography and more. Data from random-based surveys are used for weighting purposes. A series of proprietary variables are included in each survey and matched with results from known sources to gauge reliability.

All surveys have variation, meaning the survey results will be within a certain percentage range of the truth. The level of variation around any survey estimate is driven in part by the number of people responding to that question. Results based on fewer responses typically have a higher margin of error. Readers should use all results of any survey with caution, keeping an eye on the sample size and methods used. The confidence limits for the major results reported with the Southwick Media Monitor include:

### RELIABILITY OF ANGLER RESPONSES REGARDING TYPES OF MEDIA USED TO ACCESS OUTDOOR (FISHING, HUNTING, SHOOTING) INFORMATION – APRIL 2011 ANGLERS

Rank:	Media	Results	Sample Size	Lower Limit	Upper Limit
1	Magazines	84.2%	1867	82.5%	85.8%
2	Websites	75.8%	1867	73.9%	77.8%
3	Television	61.9%	1867	59.6%	64.1%
4	Social Media	29.6%	1867	27.5%	31.7%
5-tie	Newspapers	25.0%	1867	23.0%	27.0%
5-tie	Books	21.6%	1867	19.7%	23.4%
6	Radio	6.5%	1867	5.4%	7.6%
7-tie	None	3.5%	1867	2.7%	4.3%
7-tie	Other	2.7%	1867	1.9%	3.4%

For the Quarter 1, 2011 Media Monitor: Individuals registered to participate in AnglerSurvey.com<sup>®</sup>, ShooterSurvey.com<sup>®</sup> or HunterSurvey.com<sup>®</sup> were invited to participate in Media Monitor on April 15, 2011. The survey was closed on April 28, 2011. Nearly 4,500 surveys were collected with 4,123 usable observations. This report evaluates only those who responded to SAMM and AnglerSurvey.com<sup>®</sup> (n=1,867 responses).

### SURVEY STATISTICS

Number of Observations (completed surveys)	4,484
Number of Usable Observations	4,123
Number of Usable Observations from HunterSurvey <sup>®</sup> /ShooterSurvey <sup>®</sup> Participants	2,719
Number of Usable Observations from AnglerSurvey <sup>®</sup> Participants	1,867

### AnglerSurvey.com<sup>®</sup>, ShooterSurvey.com<sup>®</sup> and HunterSurvey.com<sup>®</sup>

Every month, Southwick Associates, Inc. surveys nearly 5,000 anglers, hunters and shooters to track activities afield, purchases, top brands, where products are sold, and more. The results are available from Southwick Associates via subscriptions or custom reports. For more information, contact [Courtney@c2csalesandmarketing.com](mailto:Courtney@c2csalesandmarketing.com) or [Rob@SouthwickAssociates.com](mailto:Rob@SouthwickAssociates.com).

## Frequently Asked Questions (FAQs)

### 1. What is the purpose of Southwick Associates' market monitoring services?

**HunterSurvey, ShooterSurvey, and AnglerSurvey** were created in 2007 to help outdoor businesses and the conservation community better understand trends regarding hunting, fishing and outdoor-related spending and activities. These surveys were designed to provide greater detail on a frequent basis across all types of activities and retail sectors. Private companies use the results to identify their market share, better understand their competitors, learn where consumers are shopping for specific types of products, the prices paid, and more. Others in the outdoor community use these market monitoring services to gain a better understanding of sportsmen and women's preferences, demand shifts, and needs.

**Southwick Associates Media Monitor (SAMM)**, developed in 2010, measures use of outdoor media - namely magazine, television, and internet (social media) in the fishing, hunting and shooting communities, and matches sportsmen's purchasing preferences to specific media programs and titles. SAMM tells us:

- \* Which media properties have larger audiences,
- \* The type of hunter, angler and shooter using specific media properties, and
- \* The purchasing habits of each property's audience.

SAMM is also intended to help manufacturers understand which television programs, magazines and websites reach a greater number of sportsmen interested in their products. SAMM also helps companies better understand the size and interests of specific audiences and monitor audience size trends. ***In short, SAMM helps companies make better informed decisions about their advertising investments.***

### 2. What do the results report? What are the limitations?

For the **HunterSurvey, ShooterSurvey and AnglerSurvey**, the results report the percentage of retail transactions. For example, if Brand X is reported to have 15% of the hooks market, this means 15% of all cash register transactions where hooks were sold had a packet of Brand X on the counter. The results do not necessarily report the percentage of sportsmen who bought that product as that same transaction may have included packets of hooks from other brands. Also, the results do not report the percent of total dollars commanded by that

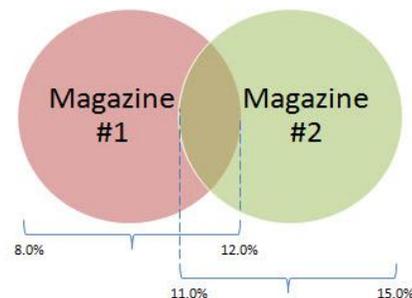
brand due to price differences across the brands. Southwick Associates can produce custom reports if these other market measures are needed.

SAMM reports the estimated percentage of hunters, anglers and shooters who watched a specific show or read a specific magazine in the previous 3 months. The major outdoor networks are covered as are the major national and regional publications. Most state and local publications, outdoor television programs appearing only on local stations and many lesser-used websites are not monitored, but could be by utilizing additional customized research.

### 3. How precise are the SAMM results?

Southwick Associates' Market Monitoring Services are based on a series of monthly and quarterly surveys of anglers, hunters and shooters nationwide. Like all surveys that are based on a sample, there is a margin of error associated with the reported results. The user needs to ***be aware of this*** when interpreting the results of this or any survey.

Typically, the margin of error is reported at a specified level of confidence and allows the reader to better understand the results. For example, if the margin of error is "plus or minus 2% at the 95% confidence level," we can be 95% certain that the stated result reflects the true population give or take 2%. To illustrate this point, if two magazines are reported to have 10.0% and 13.0% of the market, we first "draw a range" around each estimate extending 2% in either direction. See the picture below. For the first magazine, the range would be 2% above or below the estimate of 10.0%, which reaches from 8.0% to 12.0%. The interpretation is: "If the survey is conducted over and over, 95% of the time we will find this magazine's audience to be between 8.0% and 12.0%." The second magazine's audience will range between 11.0% and 15.0% 95% of the time. As shown in the picture below, the range for the two properties overlap:



When the ranges overlap, the survey cannot detect a distinct difference in the market shares and the first magazine may in reality have a larger audience than the second. If the two ranges do not overlap, you can be 95% certain that magazine #2 truly has a higher readership. The converse is also true: even when the reported ranges do not overlap there is a 5% chance that the margin of error in the sample is even larger. The margin of error for different types of media used by hunters and shooters in the first quarter of 2011 is presented on page 2.

Southwick Associates makes all possible efforts to report results as accurately as possible. The best interpretations compare the relative differences between the properties ranked and not necessarily the absolute percentages reported for each title or media property.

#### **4. Why do you report sample sizes? How do I interpret these numbers?**

The variation around any survey number is driven in part by the number of people who answered that question. Results based on fewer responses will have greater variation. Readers should use all results of any survey with caution, keeping an eye on the sample size and methods used. As with all surveys, it is important for the reader to use the results with caution, and combine the results with other available information to better understand the market.

#### **5. What survey methods are used?**

These services are based on monthly online panel surveys of anglers, hunters and shooters. The use of survey panels significantly reduces costs by avoiding the need to contact many households to find one active outdoor enthusiast. Our panelists respond out of their own interest and **are not paid** to participate which would risk attracting individuals who are **not active** in the outdoors. The panels permit cost-effective sample sizes that are much larger than possible with phone or mail surveys. As of late 2010, we regularly received close to 8,000 responses monthly, providing us the ability to report reliable results for many smaller sectors of the outdoor product and media markets.

#### **6. How are panelists recruited to participate?**

Panelists are recruited via an ongoing series of press releases promoting survey results. Each release promotes the survey name ([www.HunterSurvey.com](http://www.HunterSurvey.com), [www.ShooterSurvey.com](http://www.ShooterSurvey.com), and [www.AnglerSurvey.com](http://www.AnglerSurvey.com)). In addition, a series of links are placed on various web sites carefully chosen to

represent the wide range of fishing, hunting and shooting activities and interests found in the U.S. We minimize the number of links on commercial websites and increase the number of links on non-advertising website, especially state fish and wildlife agencies sites. To reduce any sourcing bias, results are weighted based on a number of characteristics, as described next.

#### **7. Are online surveys less accurate than other surveys?**

In any survey, especially internet surveys, it is common for respondents to not accurately represent the total population of people you want to study. For example, if someone tried to rank people's favorite soft drinks by surveying people exiting one grocery store, the results would be skewed towards those brands carried by that store. Brands not carried in that store would be rated as poor sellers even though they may be very popular at a near-by store. To overcome biases common to all survey types – including online, phone, mail and in-person surveys – our survey responses are weighted, or adjusted, to reflect the true population of U.S. sportsmen.

Characteristics such as sportsmen activities, avidity, age, income, geography and more are used to adjust, or weight, our raw survey data. These adjustment data are obtained from a number of scientific random-based survey sources, including the U.S. Fish and Wildlife Service's National Survey of Fishing, Hunting, and Wildlife-Associated Recreation, a \$12 million dollar survey conducted by the U.S. Census Bureau and the U.S. Fish and Wildlife Service. We also use a random household survey conducted by Southwick Associates, Inc., which is the primary source for sportsmen's expenditures and shooters' weighting data. Every survey asks questions that also appear in the weighting sources to help ensure the weighted results closely align with those from the scientific sources. We developed our proprietary weighting system in 2005 and have been continually refining it since.

#### **8. How reliable are internet-based surveys?**

All surveys – phone, mail, in-person or online – have some level of bias. None are perfect. Like tools in a tool box, you need to choose the best tool, or survey method, for the job. Online surveys are naturally biased to a degree towards people who are more inclined than others to use the internet. Though efforts are made to minimize this error using the weighting process described in the previous questions, we advise some caution when

comparing data regarding the percentage of sales taking place online. Based on tests at Southwick Associates, internet-based sales may be slightly overestimated by 5% to 10%. Weighting efforts successfully account for much of any undue variation in the data. All other results have proven accurate when compared to other data sources such as wholesaler and manufacturer records, the major surveys described earlier and other sources.

### 9. Who is Southwick Associates?

For over 20 years, Southwick Associates has been a leader in the field of fish and wildlife statistics and economics. We have worked directly with nearly all state fish and wildlife agencies and major sportsmen-related conservation groups to help advance a greater understanding of how anglers and hunters' expenditures support not just conservation, but also economies. We provide greater insights into outdoor recreation, how to improve outdoor-related business, and enhance sportsmen and women's individual experiences. Southwick Associates works directly with many top outdoor-related companies on customized projects, the results which are kept confidential. We are a major information resource for associations including the National Shooting Sports Foundation, the American

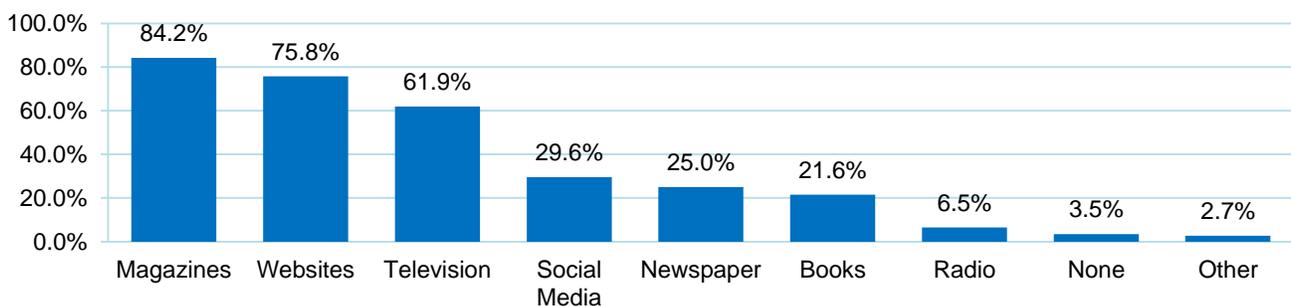
Sportfishing Association, Outdoor Industries Association, and the Association of Fish and Wildlife Agencies. We help non-government organizations such as the Recreational Boating and Fishing Foundation, the Theodore Roosevelt Conservation Partnership, Strippers Forever, National Archery in the Schools program and many more with various tasks such as monitoring market trends, conducting economic and market research, implementing economic development research, evaluating recruitment and retention efforts, and identifying optimal membership development strategies. We also help individual companies understand their place in the market, gain customer feedback on proposed new products and features, refine pricing strategies, and expand sales and profitability. The new media monitor (SAMM) also enables us to act as a marketing and advertising advisor to media companies, manufacturers, retailers and advertising agencies. On the international front, Southwick Associates has organized projects to quantify the economic returns from sportfishing tourism to various Latin American countries and identify how to increase business, and has helped the U.S. alligator industry open doors into Russia and China. Timely and dependable, Southwick Associates provides the outdoor community with the intelligence needed to improve participation and success.

## Media Usage of Anglers

The majority of AnglerSurvey panelists (84.2%) read magazines as a source of fishing, shooting, and hunting information and entertainment. Seventy-six percent (75.8%) used the websites and thirty percent (29.6%) used social media to access this information.

SAMM's respondents are primarily active, knowledgeable sportsmen and women. The audience is generally not novices or entry-level participants, or lapsed or occasional participants. Media properties targeting these segments are generally not well represented in SAMM results. We are also not in position to fairly rate state resource agency websites based on their high rates of driving traffic to the SAMM survey websites. SAMM compares rates and assesses the websites, shows and magazines that are commercial in nature rather than non-profit or regulatory.

### THE RELATIVE USE OF VARIOUS OUTDOOR MEDIA AMONG ANGLERS



**THE SKY'S THE LIMIT:**

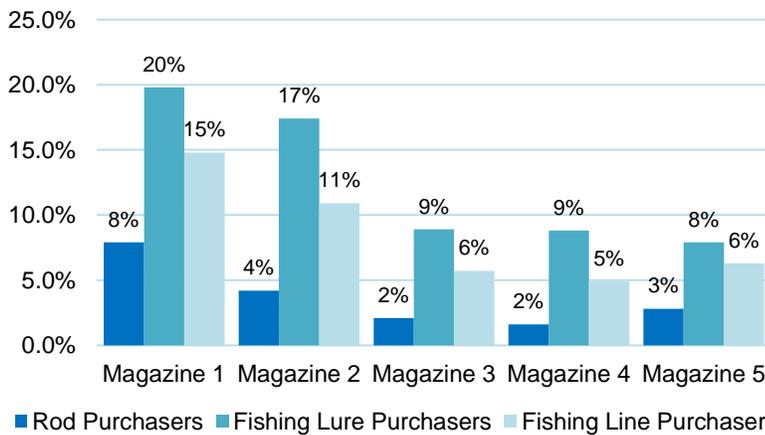
We can match data from Southwick Associates' outdoor data bases to learn more about your customers. Topics we can investigate for you include:

- Demographics (age, income, education)
- Types of activity (freshwater or saltwater fishing)
- Types of equipment purchases (rods, reels, line, lures, tackle)
- Brand names and price points of equipment purchased
- Stores in which they shopped for fishing equipment

*Contact us to learn how we can help meet your specific information needs.*

**Magazines**

**PERCENT OF FRESHWATER ANGLERS\* BY FISHING EQUIPMENT\*\* PURCHASED AND MAGAZINE TITLE**



**DATA INTERPRETATION:**

- Magazine 5 had a higher percentage of freshwater anglers purchasing fishing line and rods than Magazine 4.

**EVER EVOLVING:**

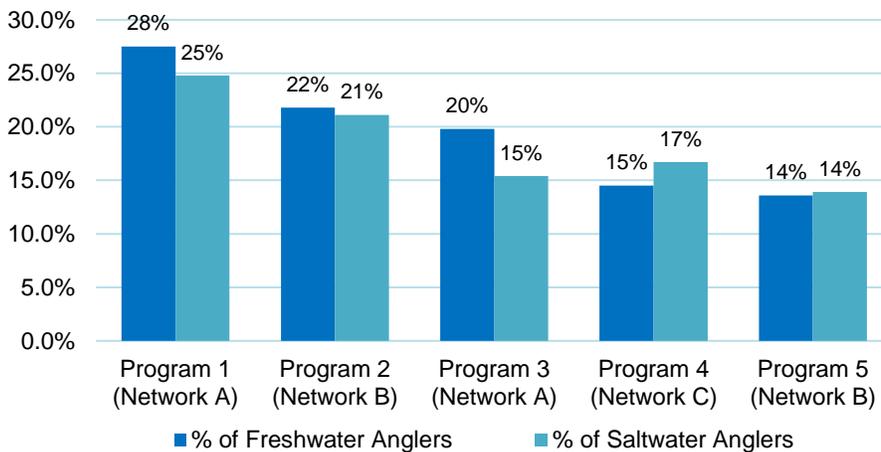
In the most recent survey, respondents could select from more than 325 outdoor magazine titles and 350 seasonally available television programs across 6 networks. This list continues to expand with new networks and programs!

\*Individuals who responded to AnglerSurvey and reported freshwater fishing at least once in the last twelve months (Apr 2010-Mar 2011).

\*\*Equipment was reported purchased in the last twelve months (Apr 2010-Mar 2011).

**Television Programs**

**SAMM ALSO RANKS 350 OUTDOOR TELEVISION PROPERTIES**



**DATA INTERPRETATION**

- 20% of freshwater anglers and 15% of saltwater anglers watched Program 3 on Network A.

### PERCENT OF SALTWATER ANGLERS\* BY FISHING EQUIPMENT PURCHASED\*\* AND TELEVISION PROGRAM

Program (Network)	% Rod Purchasers	% Fishing Lure Purchasers	% Fishing Line Purchasers
Program 1 (Network A)	6.8%	18.8%	14.5%
Program 2 (Network B)	4.5%	15.7%	13.9%
Program 3 (Network A)	7.0%	14.6%	11.3%
Program 4 (Network A)	5.3%	13.5%	10.3%
Program 5 (Network C)	4.9%	12.6%	10.1%

#### DATA INTERPRETATION:

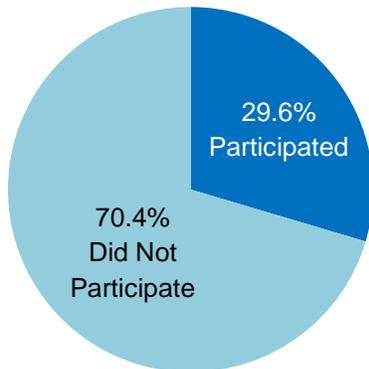
- Seven percent of saltwater anglers purchased rods within the last year and watched Program 3 on Network A.

\* Individuals who responded to AnglerSurvey and reported saltwater fishing at least once in the last twelve months (Apr 2010-Mar 2011).

\*\*Equipment was reported purchased in the last twelve months (Apr 2010-Mar 2011).

## Internet and Social Media

### PERCENT OF ANGLERS USING SOCIAL MEDIA FOR OUTDOOR ENTERTAINMENT



#### ONLINE MEDIA: BREAKING NEW GROUND

The trend toward increased cyber communication is not lost on hunters, shooters and anglers. Participation in social media increases every day. Southwick Associates can report your customers' use of specific websites and their involvement in 23 different social media platforms including Facebook, Twitter, and YouTube. Based on user responses, this list will continue to grow!!

### PERCENT OF ANGLERS BY WEBSITE

Website Name	% of Freshwater Anglers*	% of Saltwater Anglers*
Website 1	10.3%	6.5%
Website 2	9.8%	4.6%
Website 3	3.0%	2.3%
Website 4	3.5%	1.8%
Website 5	3.1%	2.4%

Responses are multiple selection and can total over 100%

\*Individuals who responded to AnglerSurvey and reported freshwater or saltwater fishing at least once in the last twelve months (Apr 2010-Mar 2011).

#### DATA INTERPRETATION:

- 6.5% of saltwater anglers listed Website 1 as one of the top three websites accessed for fishing, shooting or hunting information or entertainment purposes.

### PERCENT OF FRESHWATER ANGLERS BY FISHING EQUIPMENT PURCHASED AND SOCIAL MEDIA SITE

Social Media Site	% Rod Purchasers*	% Fishing Lure Purchasers*	% Fishing Line Purchasers*
Social Media 1	6.6%	27.2%	20.1%
Social Media 2	2.8%	11.6%	9.2%
Social Media 3	1.6%	6.0%	5.5%
Social Media 4	1.5%	4.1%	3.0%
Social Media 5	0.3%	1.4%	0.9%

Responses are multiple selection and can total over 100%

\*Individuals who responded to AnglerSurvey and reported freshwater or saltwater fishing at least once in the last twelve months (Apr 2010-Mar 2011).

#### DATA INTERPRETATION:

- 11.6% of freshwater anglers purchased fishing lures in the last year and accessed Social Media 1 for fishing, shooting, or hunting information or entertainment purposes.

## Report Content Details

The angler subscription report includes media consumption (magazines, television programs, websites, and social media sites) by:

- Fishing activities: freshwater, saltwater
- Equipment purchases: rods, reels, combination rod/reel, lures, fishing line, terminal tackle, fly fishing tackle, fishing electronics, fishing apparel.

Custom report options could include basic descriptive tables or cross-tabulations of:

By Demographics:

- Age, Income, Education, Race, Gender, State/Region, Conservation Organization Member (y/n)

By Freshwater or Saltwater:

- Methods of fishing (live bait, dead bait, lures, flies)
- Species (17 freshwater species are listed, and 31 saltwater species. We can provide results for each of these, when sample sizes allow)
- Places fished from (canoe, kayak, land/pier/dock/wading, powerboat, boat (non-power), float tube, ice, other)
- Days fished

By Items Purchased – the tackle categories listed below have the following details:

- Retail price point
- By store where purchased: Mass Merchants (Wal-Mart, Kmart, etc.), Fishing shows or expos, General Sporting Goods (Sports Authority, Dicks, Academy, etc), Local shop (bait tackle, specialty fly shop), Mass Merchant (Wal-Mart, K-Mart, Sams Club), Outdoor Specialty Store (Bass Pro, Cabela's, Gander Mountain), Printed Catalog (Bass Pro and Cabela's), Used, Website (Cabela's, Bass Pro), Other)
- By brand

Tackle Categories We Monitor:

- Fishing Rods
- Fishing Reels
- Fishing Combos
- Fishing Line (monofilament, super-line or braid, fluorocarbon)
- Fishing Lures (hard bait, soft bait, spinner bait, dough bait, jig)
- Terminal Tackle (bobbers, hooks, leaders, rigs, sinkers, swivels)
- Fly-Fishing Gear (fly rod, fly reels, rod and reel combo, fly rod case, flies, fly leader and tippet, fly line, fly tying tool and vise (with breakouts by type of tool), fly tying material, fly vest, pack bag, fly fishing chest wader, fly fishing wading boot, fly fishing rain jacket)
- Fishing Electronics (fish finder or sonar, GPS or radio, underwater camera)
- Ice Fishing (rod, reel, combo, tip-up rod, line, ice auger, ice fishing house/shelter, sled)
- Fishing Apparel (footwear, hats or headgear, raingear, clothing, waders, gloves, life jacket or vest, fishing vest)
- Other Fishing Equipment (tackle box, bait buckets or aerators, cast nets, hook sharpeners/removers/pliers, knives, landing nets, scales/grips/measuring devices, stringers, trolling motor)

**PRICING:** Please contact Courtney Olson, [Courtney@c2csalesandmarketing.com](mailto:Courtney@c2csalesandmarketing.com), 303-955-2194 for details.



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