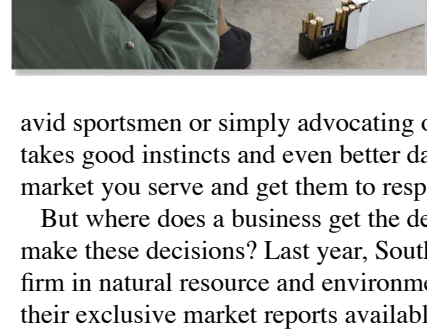


Welcome to the Southwick Associates newsletter focusing on the economics, business and statistics of fish, wildlife and their associated outdoor recreations.

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Market Reports on Firearms, Hunting, Ammunition, Fishing Now Available



The outdoor industry is a multi-billion dollar business with expenditures of more than \$76 billion a year spent on recreational hunting, fishing and shooting. But whether your business or organization is focused on manufacturing products for this dedicated market, selling products or services to these

avid sportsmen or simply advocating on behalf of these enthusiasts, it takes good instincts and even better data to completely understand the market you serve and get them to respond with their wallets.

But where does a business get the detailed information needed to make these decisions? Last year, Southwick Associates, the leading firm in natural resource and environmental economic research, made their exclusive market reports available to businesses, organizations and the media focused on serving the outdoor recreational markets.

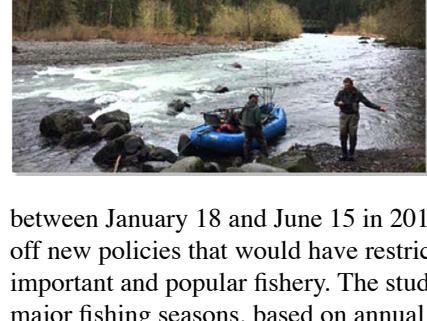
The available reports included the 2012 Size of Firearms and Ammunition Market Report, the 2012 Size of Hunting Market Report and the 2012 Size of the Sportfishing Market Report. Soon, the Firearms and Ammunition and the Hunting reports will be updated and revised to include data for 2013. Look for the Sportfishing Market Report to be updated in early 2015 with numbers from the current year. Each updated report includes the following:

• **Size of Firearms and Ammunition Market Report**—Presents detailed market size estimates, reported in retail dollars, for all types of firearms and ammunition sold. It breaks down total sales of handguns, shotguns, traditional rifles, modern sporting (tactical or AR-style) rifles, blackpowder firearms and airguns, as well as all of the ammunition categories available for the many types of guns. It even provides data down to the gauge or caliber in order to represent the most accurate picture of the market available.

• **Size of Hunting Market Report**—The Hunting Market Report breaks down in real dollars how much hunters spent on traditional rifles, tactical rifles, handguns, shotguns, blackpowder firearms, airguns, ammunition (by type), bowhunting gear, decoys, game calls, optics, handloading and more.

For more detailed information about the 2012 reports or the availability of the updated 2013 reports, visit southwickassociates.com or contact John DePalma with Brand Intelligent at jdepalma@brandintelligent.com or 303-552-8454.

A River Runs Through It: Sandy River Economic Impacts of Fishing



Southwick Associates recently concluded a study on behalf of the Northwest Sportfishing Industry Association (NSIA) that provided a snapshot of the expenditures by recreational anglers and economic impacts of sportfishing on Oregon's Sandy River during one nearly six-month period

between January 18 and June 15 in 2013. The goal was to help head off new policies that would have restricted fishing participation in this important and popular fishery. The study period was selected to reflect major fishing seasons, based on annual creel data provided by the Oregon Department of Fish and Wildlife's (ODFW).

The Sandy River drains the west and south slopes of Mount Hood and flows approximately 55 miles draining approximately 508 square miles of Clackamas and Multnomah counties.

Based on ODFW data showing anglers spent a total of 20,089 days fishing the river during the survey period and matching this to regional economic data, the report, *Sport Fishing on the Sandy River in Oregon – Expenditures and Economic Impacts, January 18 to June 15, 2013*, notes that anglers along the river spent \$802,564 on direct trip-related purchases such as food, lodging and food. If the numbers are expanded to include all of the categories commonly used by anglers (rods, lures, etc.), that number jumps to \$1.32 million. When looking at the total expenditures by Sandy River anglers during the survey period, their spending supported 22.2 jobs that provided \$774,781 in wages and contributed \$1.29 million to the state's gross product. As a result of these numbers, the presiding judge cited the potential economic hardships from proposed fishing restrictions and refused to close sportfishing along this recreationally important gem of a river.

[Learn more](#) about Southwick's ability to quantify the economic impacts of outdoor recreation in virtually any sector.

Economic Contributions of Outdoor Recreation in Colorado



Outdoor recreation is worth \$34.5 billion dollars of total economic output in Colorado and contributes \$19.9 billion to the Gross Domestic Product of the state, accounting for a large part of its total annual economy. In a recent study, *The Economic Contributions of Outdoor Recreation in Colorado: A*

Regional and County Level Analysis, conducted for Colorado Parks & Wildlife, Southwick Associates reported the amount supports more than 313,000 jobs, representing 13.2 percent of Colorado's entire labor force. The study was part of an effort to identify the economic value of outdoor recreation—hiking, hunting, fishing, boating, camping, skiing, biking and more—both statewide and in seven regions.

Other highlights from the report reveal:

- Those 313,000 jobs produce \$12.4 billion in salaries and wages.
- \$4.9 billion in local, state and federal taxes are generated from outdoor recreation.
- Outdoor recreationists directly spent more than \$21 billion on trips and equipment in 2012. Of that, the Northwest region spent the most at \$6.84 billion and the North Central spent \$5.57 billion.
- In the Northwest region of the state, nearly 92,000 alone have jobs as a result of the economic contributions generated by outdoor recreation. That is nearly one-third of the entire adult population for the area.
- Fishing, hunting and wildlife watching account for \$5 billion of the total economic output of outdoor recreation and supports nearly 50,000 jobs.

[View the complete report.](#)

Top Hunting and Shooting Brands 2013



Every year, we provide the best snapshot of what the hottest selling, most recognizable brands in hunting and firearms plus a list every company wants to be a part of: our list of the top selling hunting and shooting brands for 2013. Just a few of the top honors with the percentage of survey respondents

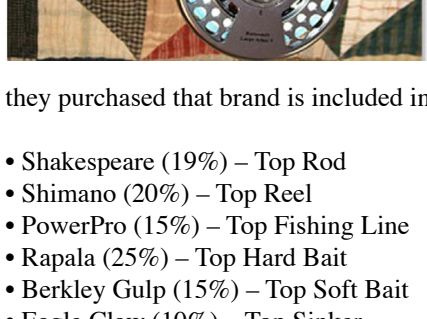
who said they purchased that brand in 2013 in parentheses include:

- Savage (10%) – Top Rifle
- Remington (25%) – Top Shotgun
- Ruger/Smith & Wesson (tie 17%) – Top Handgun
- Matthews (18%) – Top Bow
- Winchester (31%) – Top Shotgun Ammunition
- Winchester (17%) – Top Handgun Ammunition
- Remington (20%) – Top Rifle Ammunition
- Rage (23%) – Top Broadhead Print
- Nikon (17%) – Top Binocular
- Bushnell (21%) – Top Telescope
- Rocky (12%) – Top Boot
- Buck (17%) – Top Knife
- Ameristep, Summit (tie 11%) – Top Treestand

This list is merely a small portion of the actual hunting and shooting categories listed. Additional information such as sales by caliber and gauge, type of retailers from which bought, demographics, etc. are available to those interested in purchasing an annual subscription to Southwick Associates' bi-monthly Hunting and Shooting Participation and Market Trends report.

For more details, visit southwickassociates.com or contact John DePalma with Brand Intelligent at jdepalma@brandintelligent.com or 303-552-8454.

Top Fishing Brands of 2013



Like the top hunting and shooting brands list, Southwick also released the top fishing brands for 2013. Some of those top named companies, as determined by survey responses where respondents reported their 2013 outdoor purchases by brand (percent who said

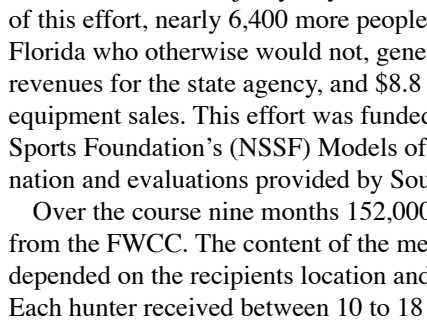
they purchased that brand is included in parentheses below), include:

- Shakespeare (19%) – Top Rod
- Shimano (20%) – Top Reel
- PowerPro (15%) – Top Fishing Line
- Rapala (25%) – Top Hard Bait
- Berkley Gulp (15%) – Top Soft Bait
- Eagle Claw (10%) – Top Sinkers
- Eagle Claw (23%) – Top Swivel
- Orvis, Redington (tie 12%) – Top Fly Rod
- Orvis (17%) – Top Fly Reel
- St. Croix (27%) – Top Ice Fishing Rod
- Hodgman (16%) – Top Wader
- Columbia (29%) – Top Fishing Clothing
- Frabill (27%) – Top Landing Net
- Rapala (30%) – Top Fishing Knife
- Minn Kota (87%) – Top Trolling Motor

This is just a partial list. A complete list and more details including average prices and angler demographics, type of fishing and preferred species is available.

For the complete report or to purchase an annual subscription to the bi-monthly AnglerSurvey.com reports, contact John DePalma at jdepalma@brandintelligent.com or 303-552-8454.

Effectiveness of Email Campaigns in Growing Hunters, License Sales



Recently, a pilot study was conducted by the Florida Fish and Wildlife Conservation Commission (FWCC) to determine if email and social media can increase hunting participation and license sales. The goal of this effort was to determine if a regular series of communi-

cations, based on the premise of building relationships with customers, could increase the percentage of hunters who renew their licenses each year. In recent years, less than 50% of hunters nationally renew their licenses in a majority of years over a five year period. As a result of this effort, nearly 6,400 more people bought a hunting license in Florida who otherwise would not, generating over \$300,000 in new revenues for the state agency, and \$8.8 million in additional hunting equipment sales. This effort was funded by the National Shooting Sports Foundation's (NSSF) Models of Success program with coordination and evaluations provided by Southwick Associates.

Over the course nine months 152,000 received 1.8 million emails from the FWCC. The content of the messages, timing and volume depended on the recipients location and local hunting opportunities. Each hunter received between 10 to 18 contacts. The content of each message varied, with the intent to never let the recipient think they know the content of an email and delete it before reading. As many as 13,800 hunters were set aside in a control group for evaluation preferences. Probably most important, whenever a message was released, reinforcing messages were distributed via Facebook and Twitter.

Key Findings – Growth in license sales were not observed until hunters received 13 or more emails. Sixteen emails proved to provide maximum results. Interestingly, the highest response rates were seen in the key 18- to 25-year-old category. A rerun of the campaign the following year (2012) that did not have a coordinated social media component showed much lower response rates, especially in this key age category. Similar efforts in other Southeastern states that did not have a coordinated social media component or fewer contacts did not show statistically valid responses similar to Florida, so details may be critical for similar campaigns to succeed in the future, or results may vary by region regardless of content and method. We anticipate further testing to see if how this approach works in other states.

IN OUR NEXT ISSUE

- How to Boost Conservation Funding
- National Sportsmans Survey: Results and Opportunities
- Maine and Saskatchewan Hunting and Fishing Tourism
- Recreational Boating and Fishing Foundation Report on First Time Anglers
- and More

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Numbers By Southwick

\$76 billion

Amount spent each year spent on recreational hunting, fishing and shooting.

\$1.32 million

Amount anglers spent fishing Oregon's Sandy River between Jan. 18-June 15, 2013.

\$34.5 billion

Total economic output in Colorado from outdoor recreation.

13.2 %

Percentage of Colorado workforce supported by outdoor recreation.

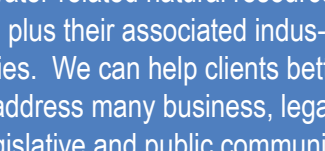
That amounts to 313,000 jobs that pay a total of \$12.4 billion in wages.

10%

is the number of survey respondents who bought a Savage rifle in 2013.

100%

Return on investment to game departments utilizing email campaigns to increase the number of hunters who buy licenses.



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 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. For information and other reports, visit our Web site at www.southwickassociates.com or to view full newsletter stories.

Interested agencies and organizations should contact Southwick Associates at 904-277-9765 or email Rob Southwick at rob@southwickassociates.com. You can also visit the "Specialties" section of our website for a complete view of the services we provide.

