

Women in the Outdoors in 2012:

A study of women's activities, perceptions, purchases, and related media consumption related to fishing, shooting and hunting

Results from the AnglerSurvey.com[®], HunterSurvey.com[®], ShooterSurvey.com[®], and Southwick Associates Media Monitor Online Consumer Panel Surveys



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**Produced in:
July 2013**

This report is intended for media companies providing a link to AnglerSurvey.com. Contact Southwick Associates for link files. A detailed report providing greater fishing tackle market share data, price point information and more is available by subscription or sale from Southwick Associates, Inc. Contact donna@southwickassociates.com for more information or prices.

Table of Contents

<i>Introduction and Background</i>	2
<i>Freshwater and Saltwater Fishing Activities</i>	5
<i>Freshwater Fishing</i>	5
<i>Saltwater Fishing</i>	8
<i>Fishing Equipment Purchases</i>	11
<i>Hunting and Shooting Activities</i>	12
<i>Hunting Activities</i>	13
<i>Shooting Activities</i>	14
<i>Hunting and Shooting Equipment Purchases</i>	15
<i>Outdoor Media Consumption</i>	17

List of Figures

<i>Figure 1. Percent of anglers and hunters who are female</i>	Error! Bookmark not defined.
<i>Figure 2. Percent of sportswomen by activity</i>	3
<i>Figure 3. Top three places where freshwater anglers fished at least once in 2012.</i>	5
<i>Figure 4. Top six types of freshwater fish pursued anglers who freshwater fished at least once in 2012.</i>	6
<i>Figure 5. Fishing methods used by freshwater anglers who fished at least once in 2012.</i>	7
<i>Figure 6. Top three places where saltwater anglers fished at least once in 2012.</i>	8
<i>Figure 7. Top seven types of saltwater fish pursued by saltwater anglers who fished at least once in 2012.</i>	9
<i>Figure 8. Fishing methods used by anglers who saltwater fished at least once in 2012</i>	10
<i>Figure 9. Fishing equipment purchased at least once in 2012.</i>	11
<i>Figure 10. Species pursued at least once in 2012 by those how reported hunting.</i>	13
<i>Figure 11. Types of shooting participated in at least once in 2012 for those who reported shooting.</i>	14
<i>Figure 12. Hunting/shooting equipment purchased at least once in 2012.</i>	15
<i>Figure 13. Top six media types accessed for information or entertainment related to hunting, shooting or fishing</i>	17

List of Tables

<i>Table 1. Places where freshwater anglers fished at least once in 2012</i>	5
<i>Table 2. Freshwater species targeted at least once in 2012.</i>	6
<i>Table 3. Fishing methods used by freshwater anglers at least once in 2012.</i>	7
<i>Table 4. Places where saltwater anglers fished at least once in 2012.</i>	8
<i>Table 5. Saltwater species targeted at least once in 2012</i>	9
<i>Table 6. Fishing methods used by saltwater anglers at least once in 2012.</i>	10
<i>Table 7. Fishing equipment purchased at least once in 2012.</i>	11
<i>Table 8. Reasons why people choose to spend their time fishing.</i>	12
<i>Table 9. Species targeted for hunting at least once in 2012.</i>	13
<i>Table 10. Types of shooting activities participated in 2012</i>	14
<i>Table 11. Hunting/shooting equipment purchased at least once in 2012.</i>	16
<i>Table 12. Reasons why people chose to spend their time hunting or shooting.</i>	16
<i>Table 13. Types of media sportsmen and sportswomen accessed April-June 2013.</i>	17

Introduction and Background

According to the recent release of the 2011 Fish and Wildlife Service's National Survey of Fishing, Hunting and Wildlife-Associated Recreation¹ (National Survey), women make up more than one-quarter of anglers. While the proportion of hunters who are women is smaller relative to fishing, the percentage of female hunters has steadily risen in recent years (Figure 1).

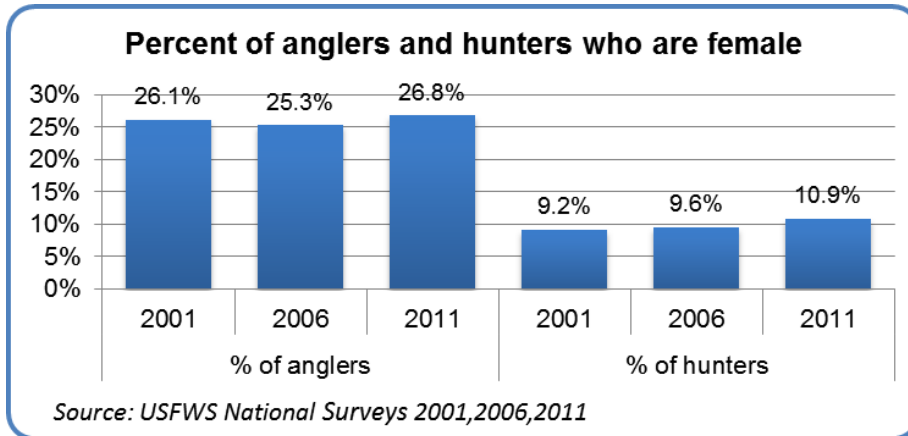


Figure 1. Percent of anglers and hunters who are female

While the proportion of hunters who are women is smaller relative to fishing, the percentage of female hunters has steadily risen in recent years (Figure 1).

When one considers the type of activities in which sportswomen participate, fishing (and not hunting) has an overwhelming majority (Figure 2). After a drop in overall participation in 2006, the number women who fish and/or hunt rebounded to 2001 levels by 2011. An interesting finding is that sportswomen in 2011 were participating in both hunting and fishing considerably more than they had in the past decade. This crossover of activities is important to note. Using our panel surveys, we are able to dig deeper to explore the activities of these women, what they are purchasing, and the outdoor media they consume. Women, in general, participate fewer days in fishing and hunting per year than men.

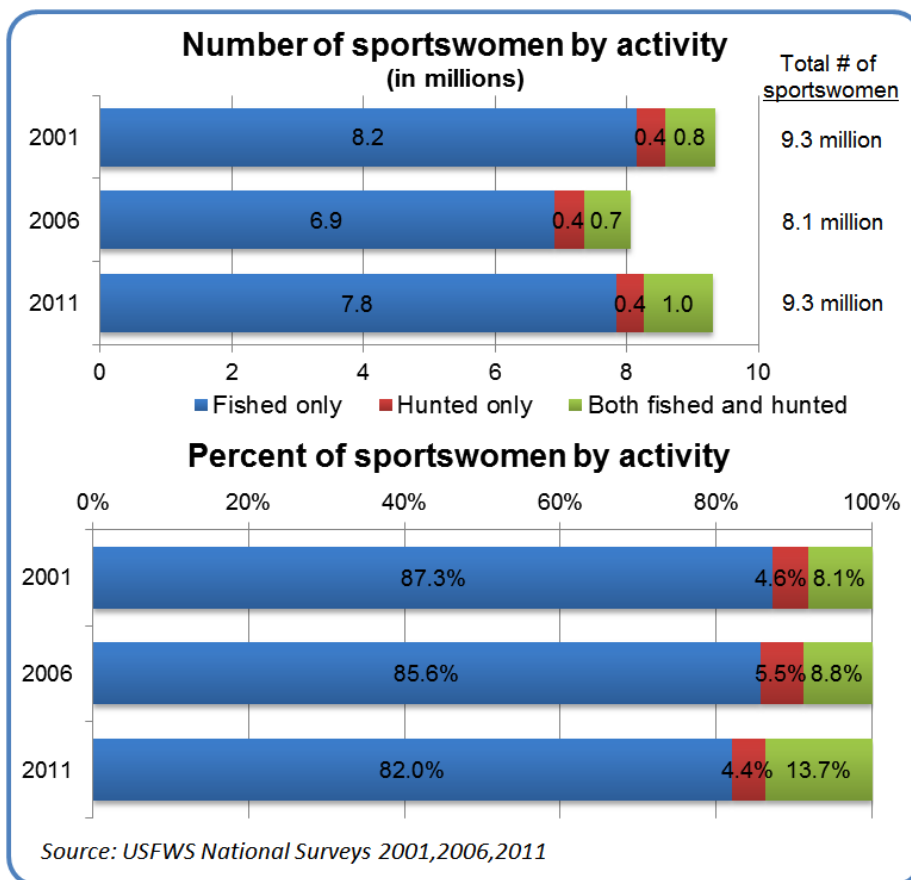


Figure 2. Percent of sportswomen by activity

¹ U.S. Department of the Interior, U.S. Fish and Wildlife Service, and U.S. Department of Commerce, U.S. Census Bureau. 2011 National Survey of Fishing, Hunting, and Wildlife-Associated Recreation.

Southwick Associates Panel Surveys

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 types of hunters, anglers and shooters using specific media properties, and
- * The purchasing habits of each property's audience.

SAMM also works to help manufacturers understand which television programs, magazines and websites reach a greater number of sportsmen interested in their products. SAMM supports companies in achieving a better understanding of the size and interests of specific audiences and monitoring audience size trends.

A READER'S NOTE: The results in this report include both female and male survey respondents, broken out by gender. The goal is to show ways (activities, purchases, and media consumption) the outdoor behavior and choices of women differ from men. Unlike results presented in HunterSurvey/AnglerSurvey subscription reports, the results in this report are presented as a function of the individuals' responses throughout the entire year.

Freshwater and Saltwater Fishing Activities

Freshwater Fishing

Among all freshwater anglers, the most popular place to fish from is on land (Figure 3). Seventy-eight percent of female anglers and 72% of male anglers report freshwater fishing from land, shore, beach, pier, dock, bridge, or wading at least once in 2012. Similarly, the second and third most popular places are by boat (power and non-power). A smaller percentage of female freshwater anglers report fishing from a powerboat, relative to male freshwater anglers. Additional details and places to fish are included in Table 1.

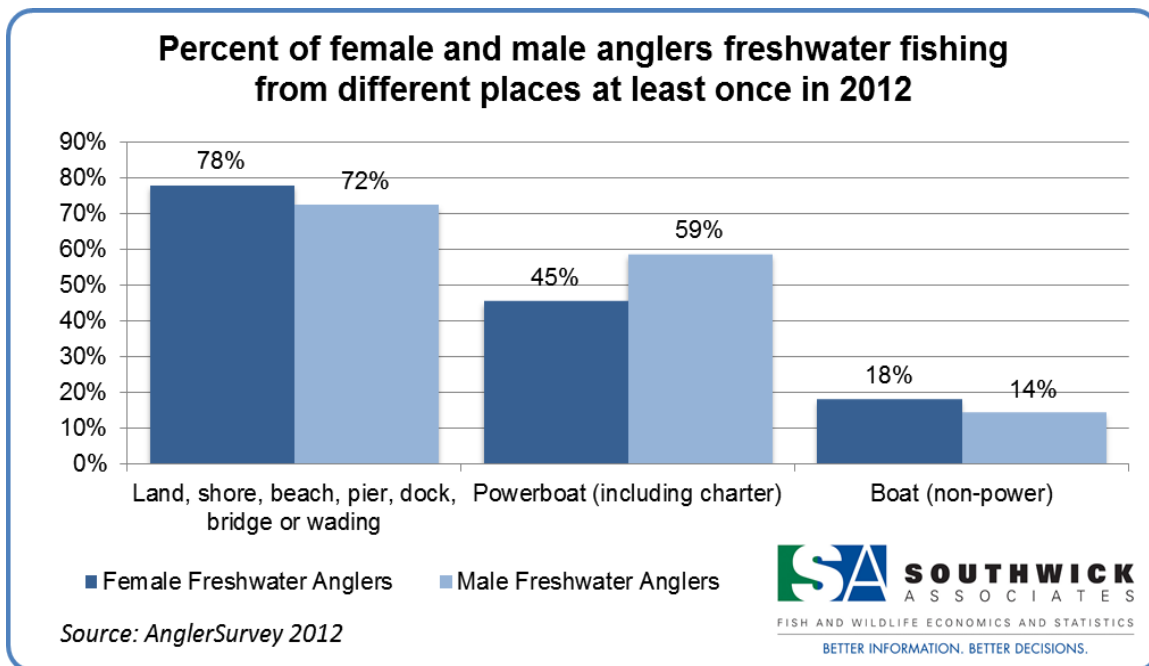


Figure 3. Top three places where freshwater anglers fished at least once in 2012.

Table 1. Places where freshwater anglers fished at least once in 2012.

	Female Freshwater Anglers	Male Freshwater Anglers
Land, shore, beach, pier, dock, bridge or wading	77.8%	72.2%
Powerboat (including charter)	45.3%	58.5%
Boat (non-power)	17.9%	13.9%
Canoe	8.9%	8.0%
Kayak	8.9%	7.6%
Ice	5.1%	8.1%
Floating tube	1.1%	3.7%
Total	N=129	N=3,085

The majority of both female (51%) and male (63%) freshwater anglers pursue largemouth or spotted bass (Figure 4). A greater percentage of female freshwater anglers indicate that they pursue any fish that bites, relative to male freshwater anglers. And, more than 40% of anglers (female 42% and male 50%) pursue panfish. Additional detail is included in Table 2.

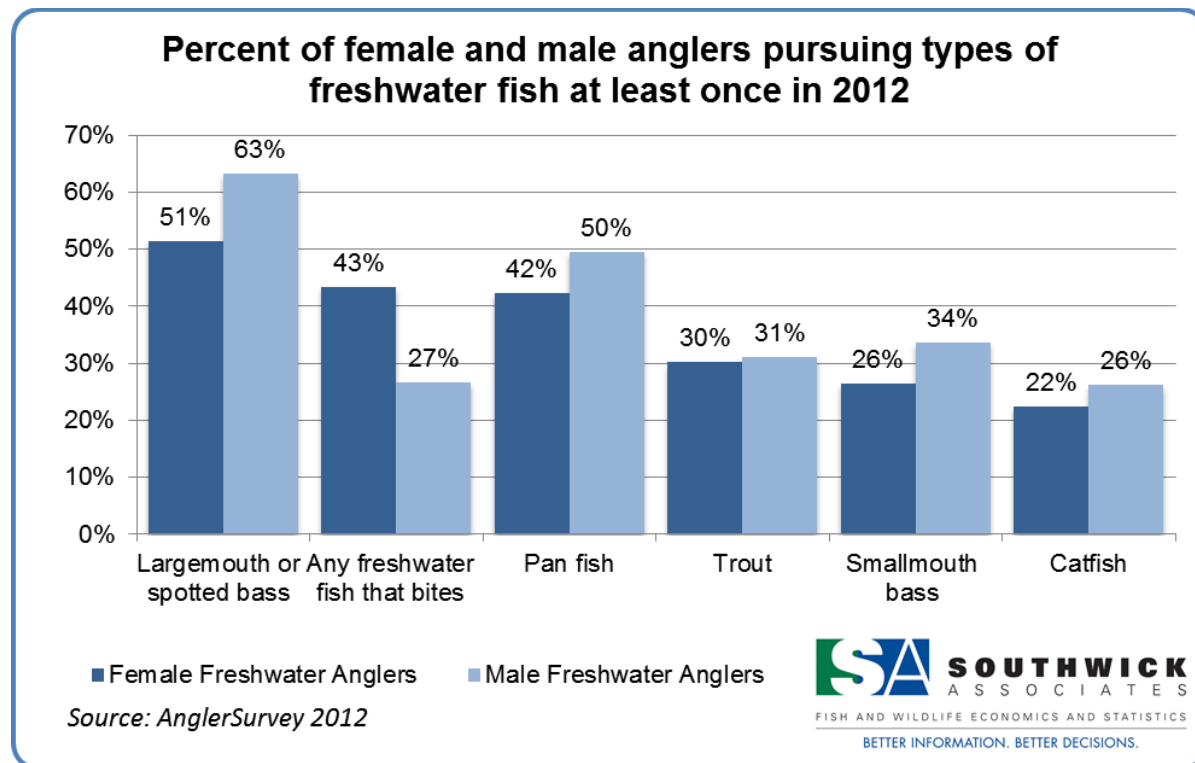


Figure 4. Top six types of freshwater fish pursued anglers who freshwater fished at least once in 2012.

Table 2. Freshwater species targeted at least once in 2012.

	Female Freshwater Anglers	Male Freshwater Anglers
Any freshwater fish that bites	43.3%	26.6%
Carp	3.3%	6.8%
Catfish	22.4%	26.1%
Largemouth or spotted bass	51.4%	63.1%
Pan fish (crappie, perch, sunfish, bluegill/bream)	42.3%	49.5%
Perch	10.1%	19.8%
Pickrel, pike or muskie	8.0%	16.2%
Salmon	8.4%	7.9%
Saugeye	1.4%	3.6%
Smallmouth bass	26.4%	33.6%
Steelhead	10.2%	7.2%
Striped bass (freshwater) or hybrid bass	7.3%	12.4%
Sturgeon	2.6%	1.1%
Trout	30.1%	31.0%
Walleye	6.6%	20.5%
White bass and sunshine bass	5.2%	9.0%
Total	N=128	N=3,086

Figure 5 and Table 3 report the most popular fishing lure and bait categories used by freshwater anglers. A strong majority of both female (71%) and male (84%) freshwater anglers utilize artificial bait to fish. The second most popular method is to use live bait (female 47%) and male (53%).

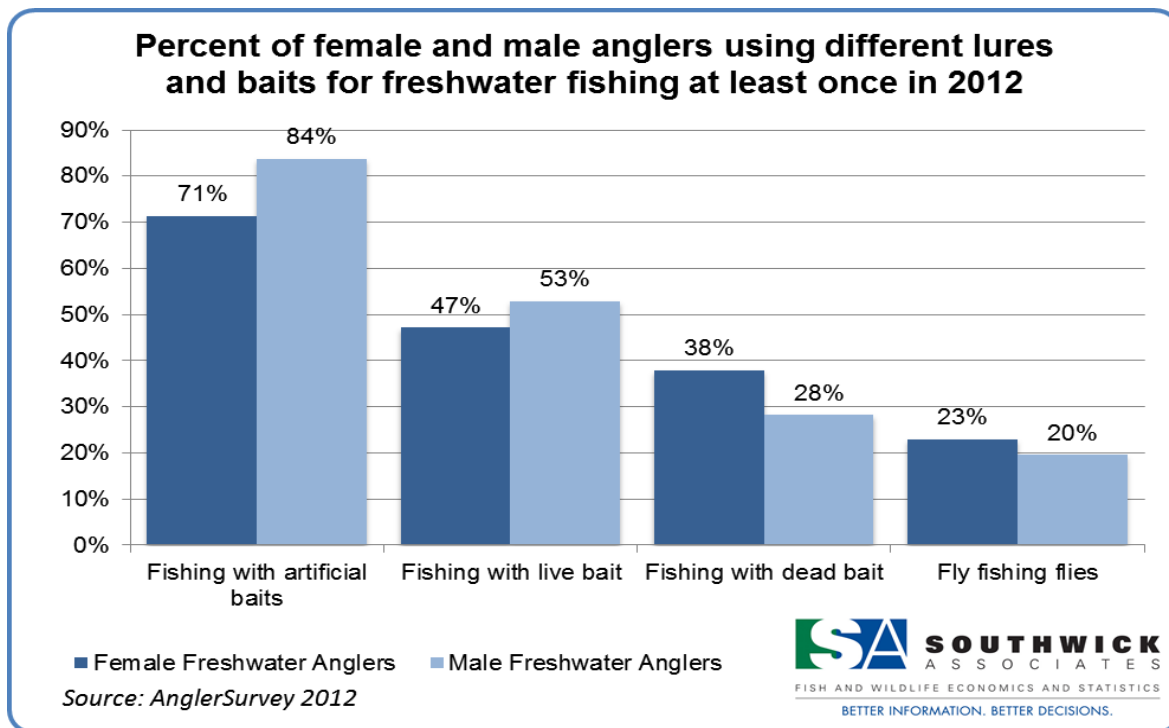


Figure 5. Fishing methods used by freshwater anglers who fished at least once in 2012.

Table 3. Fishing methods used by freshwater anglers at least once in 2012.

	Female Freshwater Anglers	Male Freshwater Anglers
Fishing with artificial baits, except flies (includes hard baits, soft baits, jigs, and spinners)	71.4%	83.8%
Fishing with live bait	47.2%	52.9%
Fishing with dead bait (liver, fish eggs, cut fish, dead shrimp, etc, including all types of dough baits and other commercially prepared baits)	37.9%	28.3%
Fly fishing flies	23.0%	19.6%
Did not use bait (bow fishing, spear fishing, noodling)	3.0%	1.7%
Other non-conventional baits (including bread, corn, etc.)	2.1%	5.7%
Total	N=129	N=3,087

Most women who freshwater fish report:

- Fishing from land or pier (78%)
- Fishing for largemouth or spotted bass (51%), and
- Fishing with artificial baits (70%).

Saltwater Fishing

Among saltwater anglers, the most popular place to fish is from a powerboat (female 68% and male 77%, Figure 6). Roughly half of saltwater anglers fish from land, regardless of gender. Substantially fewer saltwater anglers pursue fish from a kayak or other non-powered boat. Additional detail is provided in Table 4.

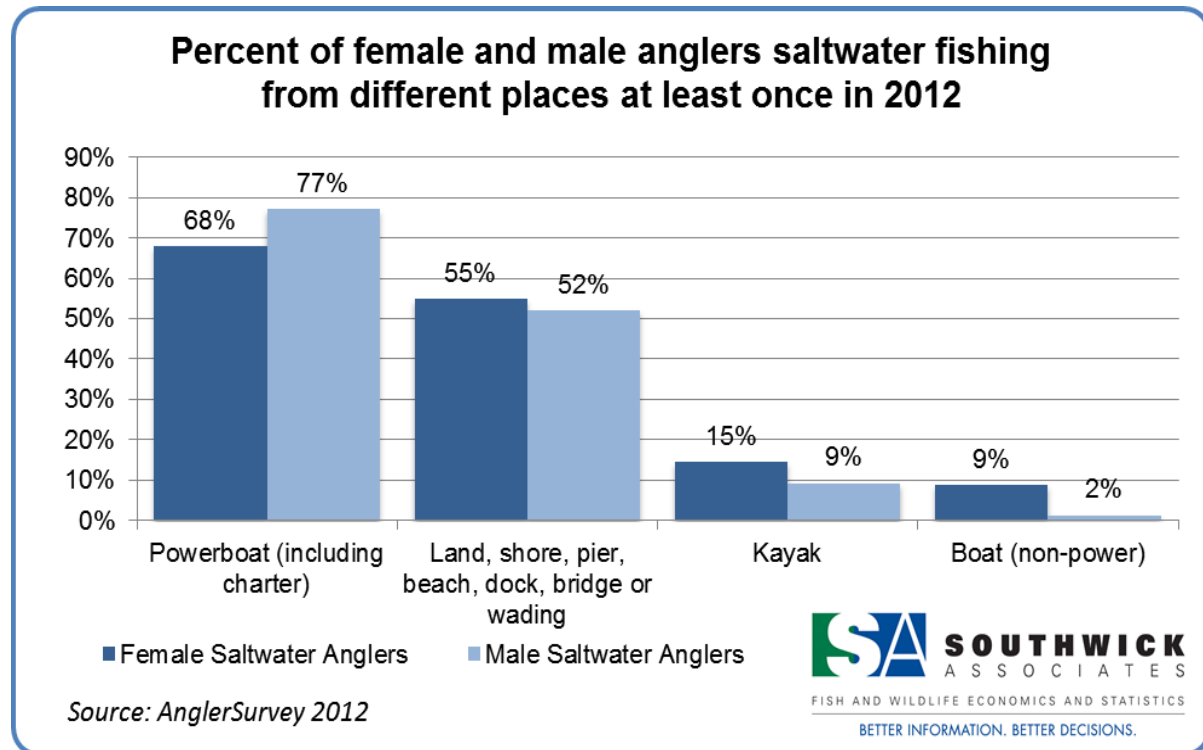


Figure 6. Top three places where saltwater anglers fished at least once in 2012.

Table 4. Places where saltwater anglers fished at least once in 2012.

	Female Saltwater Anglers	Male Saltwater Anglers
Powerboat (including charter)	68.0%	77.2%
Land, shore, pier, beach, dock, bridge or wading	55.0%	52.2%
Kayak	14.6%	9.3%
Boat (non-power)	9.0%	1.5%
Canoe	1.9%	2.7%
Ice	.0%	.3%
Floating tube	.0%	.3%
Total	N=70	N=1,128

Two-thirds of all female saltwater anglers report that they pursued any fish that bites while fishing, more than twice the percentage of male saltwater anglers. This difference in having less interest in targeting specific fish species implies a different purpose for fishing than men. See Table 8 on page 12 for more insights on why women fish. Among the six other most popular types of saltwater fish, the percentage of female anglers responding that they pursued that particular fish falls below the percentage of male anglers. An in-depth list of the types of fish pursued is included in Table 5.

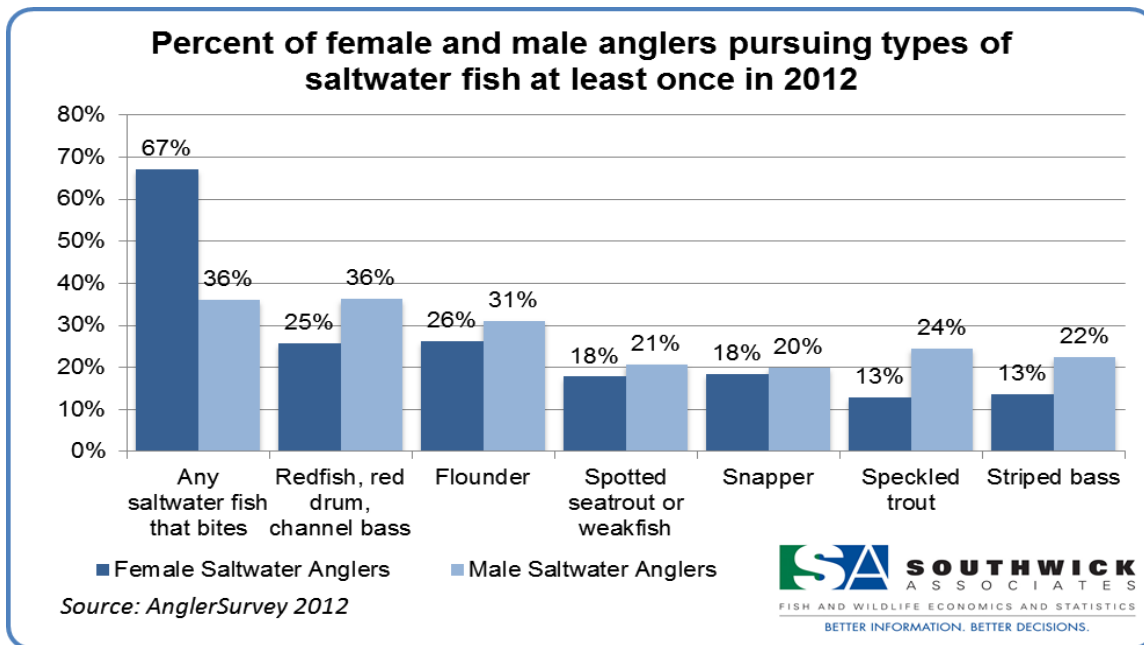


Figure 7. Top seven types of saltwater fish pursued by saltwater anglers who fished at least once in 2012.

Table 5. Saltwater species targeted at least once in 2012

	Female Saltwater Anglers	Male Saltwater Anglers		Female Saltwater Anglers	Male Saltwater Anglers
Any saltwater fish that bites	66.8%	35.8%	Pompano	12.1%	7.9%
Amberjack	2.7%	5.8%	Redfish, red drum, channel bass	25.4%	36.0%
Atlantic croaker	11.7%	5.3%	Rockfish (Pacific coast only)	1.6%	9.8%
Barracuda	6.2%	8.6%	Salmon	2.6%	5.4%
Billfish	1.4%	5.8%	Scorpion fish	1.6%	3.5%
Black drum	15.9%	9.9%	Scup	.3%	2.6%
Bluefish	7.0%	20.7%	Sea perch (Pacific coast)	1.3%	4.1%
Bonefish	1.9%	2.0%	Shark	11.3%	12.5%
Bonito	2.1%	8.0%	Sheephead	14.3%	18.8%
Calico bass	3.2%	9.0%	Snapper	18.2%	19.6%
Cobia	11.5%	9.2%	Snook	15.0%	11.9%
Cod (all species)	4.0%	6.0%	Speckled trout	12.5%	24.3%
Dolphin	7.9%	11.6%	Spotted seatrout or weakfish	17.5%	20.5%
False albacore	.0%	3.3%	Striped bass	13.4%	22.2%
Flounder	26.0%	30.9%	Sturgeon	1.8%	1.3%
Haddock	.2%	1.2%	Tarpon	4.1%	6.8%
Halibut	3.5%	11.4%	Tautog (Blackfish)	1.8%	5.4%
King fish	3.1%	7.6%	Tuna	6.6%	16.1%
Mackerel (king, spanish, boston, cero, etc)	15.7%	16.6%	Wahoo	.0%	8.2%
Other bass (Pacific coast only)	2.6%	8.3%	Whiting	7.4%	7.3%
Perch	2.8%	6.1%	Yellow tail	2.5%	12.4%
Permit	2.2%	3.2%	Total	N=69	N=1,125

As with freshwater fishing, a majority of both female (70%) and male (76%) saltwater anglers report using artificial bait when fishing (Figure 8 and Table 6). Roughly two-thirds of female anglers report using natural bait, either dead or alive. A smaller proportion of male anglers indicate that they use natural bait, relative to their female counterparts.

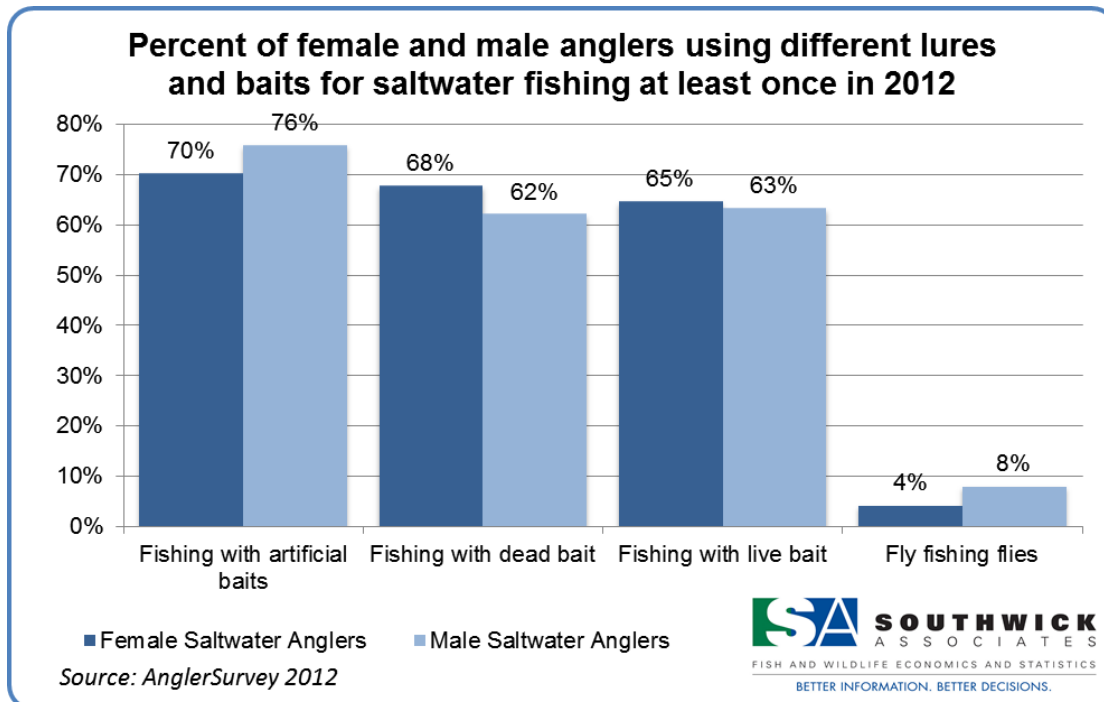


Figure 8. Fishing methods used by anglers who saltwater fished at least once in 2012

Table 6. Fishing methods used by saltwater anglers at least once in 2012.

	Female Saltwater Anglers	Male Saltwater Anglers
Fishing with artificial baits, except flies (includes hard baits, soft baits, jigs and spinners)	70.2%	75.8%
Fishing with dead bait (liver, fish eggs, cut fish, dead shrimp, etc., including all types of dough baits and other commercially prepared baits)	67.7%	62.1%
Fishing with live bait	64.6%	63.3%
Fly fishing flies	4.2%	8.0%
Did not use bait (bow fishing, spear fishing, noodling)	3.5%	1.4%
Other non-conventional baits (including bread, corn, etc.)	.2%	.8%
Total	N=70	N=1,131

Most women who saltwater fish report:

- Fishing from a powerboat (68%) or land (55%),
 - Fishing for any fish that bites (69%), and
- Fishing with artificial baits (70%) or dead bait (68%).

Fishing Equipment Purchases

Terminal tackle and lures are the most frequently purchased fishing equipment by freshwater and saltwater anglers (Figure 9 and Table 7). A slightly larger percentage of female anglers purchased terminal tackle, relative to male anglers. And, conversely, fewer female anglers purchased lures, relative to male anglers. A majority of anglers purchased fishing line. Female anglers were much more likely to purchase fishing apparel compared to male anglers (44% vs. 27%).

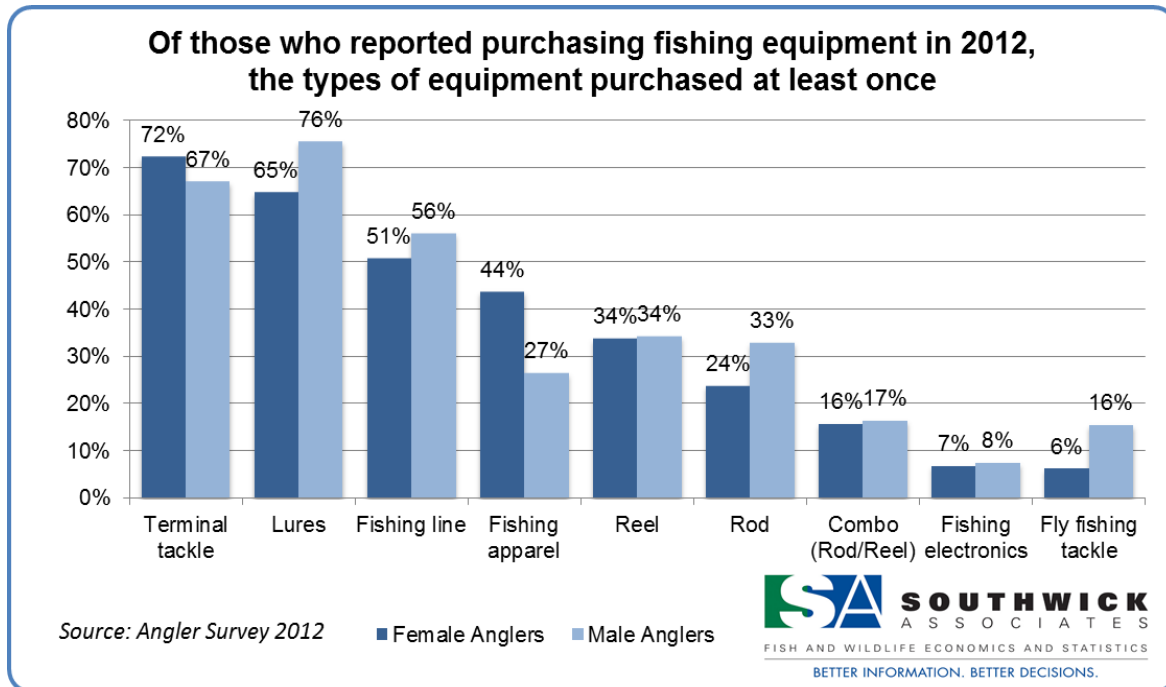


Figure 9. Fishing equipment purchased at least once in 2012.

Table 7. Fishing equipment purchased at least once in 2012.

	Female Anglers	Male Anglers
Terminal tackle (hook, sinker, swivel, rig, bobber, leader)	72.5%	67.1%
Lure – (hard, soft, spinner, dough, jig - Not fly fishing)	64.9%	75.7%
Fishing line - Not fly fishing	50.9%	56.3%
Fishing apparel	43.9%	26.6%
Reel - Not fly fishing	33.9%	34.3%
Rod - Not fly fishing	24.0%	33.0%
Combo (Rod/Reel)	15.8%	16.6%
Fishing electronics (GPS, sonar, fish finders)	7.0%	7.6%
Fly fishing tackle and accessories	6.3%	15.6%
Ice fishing equipment	1.2%	6.2%
Total*	N=123	N=3,017

*Not all anglers made fishing equipment purchases at least once in 2012. Among responding anglers, 60% of females and 77% of males report expenditures.

Of all fishing equipment, women are most likely to purchase terminal tackle.

Table 8. Reasons why people choose to spend their time fishing.

	Female Anglers	Male Anglers
Enjoy the challenge	77.2%	79.6%
Like to spend time on or near the water	86.4%	85.9%
I'm fascinated with fish	46.5%	31.4%
Like to spend time outdoors	83.9%	88.0%
It's a great way to spend time with my friends/family	83.5%	70.5%
It's fun	82.2%	81.5%
Other	12.5%	12.3%
Total	N=105	N=2,226



The top reason women choose to spend their time fishing is to spend time on or near the water (86%).

A greater percentage of women saw fishing as an opportunity to spend time with friends and family (84%) than men (71%).

Hunting and Shooting Activities

Hunting Activities

Hunters were asked about the types of species pursued and figure 10 shows the top nine pursued among female hunters. By far, deer are the most common type of quarry pursued by either female (71%) or male (72%) hunters. Roughly one third of both female and male hunters hunt turkey. A similar percentage of female and male hunters pursue small game, such as rabbit and squirrel.

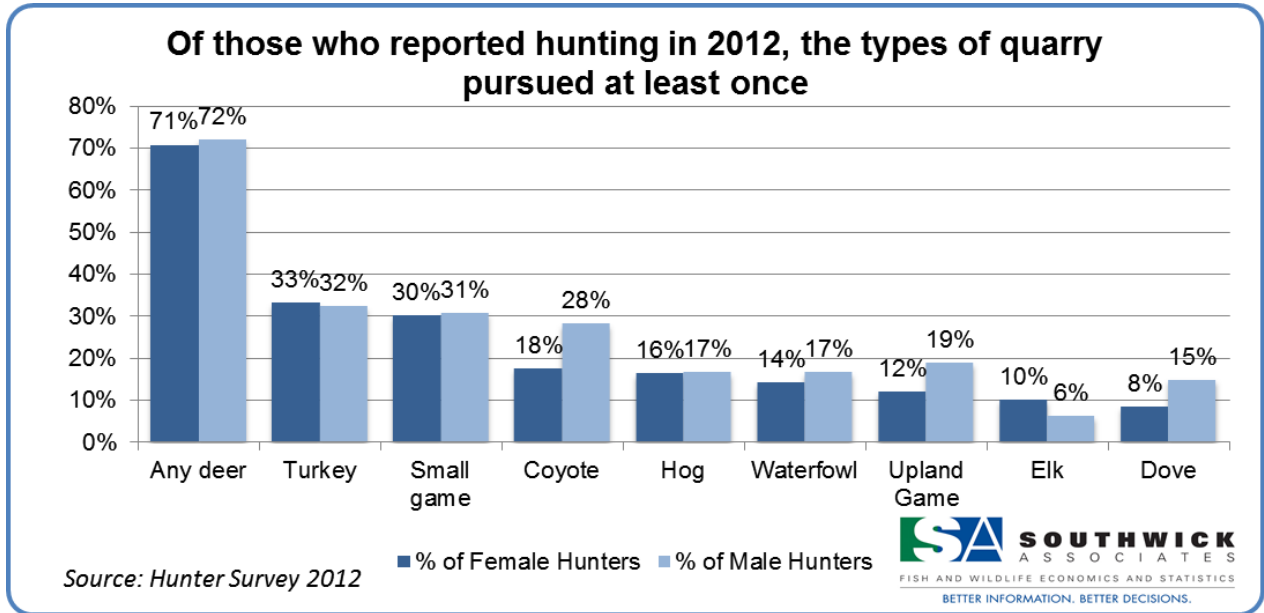


Figure 10. Species pursued at least once in 2012 by those who reported hunting.

Table 9. Species targeted for hunting at least once in 2012.

	Female Hunters	Male Hunters
Any deer (whitetail, mule deer, blacktail, sitka, axis)	70.8%	72.0%
Turkey	33.1%	32.3%
Small game (rabbit, squirrel)	30.1%	30.7%
Coyote	17.6%	28.1%
Hog (including Javelina)	16.3%	16.6%
Waterfowl (Ducks, Geese)	14.1%	16.7%
Upland Game Birds (quail, pheasant, grouse, woodcock)	12.0%	18.9%
Elk	10.1%	6.2%
Dove	8.4%	14.9%
Bear	7.7%	6.7%
Predator/Predator calling	5.4%	16.9%
Caribou	3.3%	.2%
Varmint/Furbearers (badger, beaver, muskrat, otter, raccoon, ringtail, weasel, nutria, skunk)	2.8%	10.9%
Moose	1.0%	.9%
Antelope	.9%	2.0%
Prairie dog	.9%	2.8%
Bison/Buffalo	.3%	.2%
African game	.3%	.3%
Sheep, goat	.2%	.4%
Alligator	.0%	.6%
Total	N=142	N=5,573

Most women reported hunting for deer in 2012 (71%).

Shooting Activities

Shooters were asked about the types of shooting activities pursued and Figure 11 shows the top seven types among women. Sixty five percent of female shooters participated in rifle shooting activities. And, just over half participated in handgun or shotgun activities. In the case of rifle and handgun activities, the proportion of female shooters in the sport is much smaller than their male counterparts, 13% for rifles and 15% for handgun. The proportion of female shooters participating in shotgun shooting activities is equivalent to male shooters. Women are less diverse in their shooting participation (more likely to shoot just one type of equipment) than men. Maintaining their long-term involvement may hinge on diversifying their shooting activities, to keep it continually fresh and interesting.

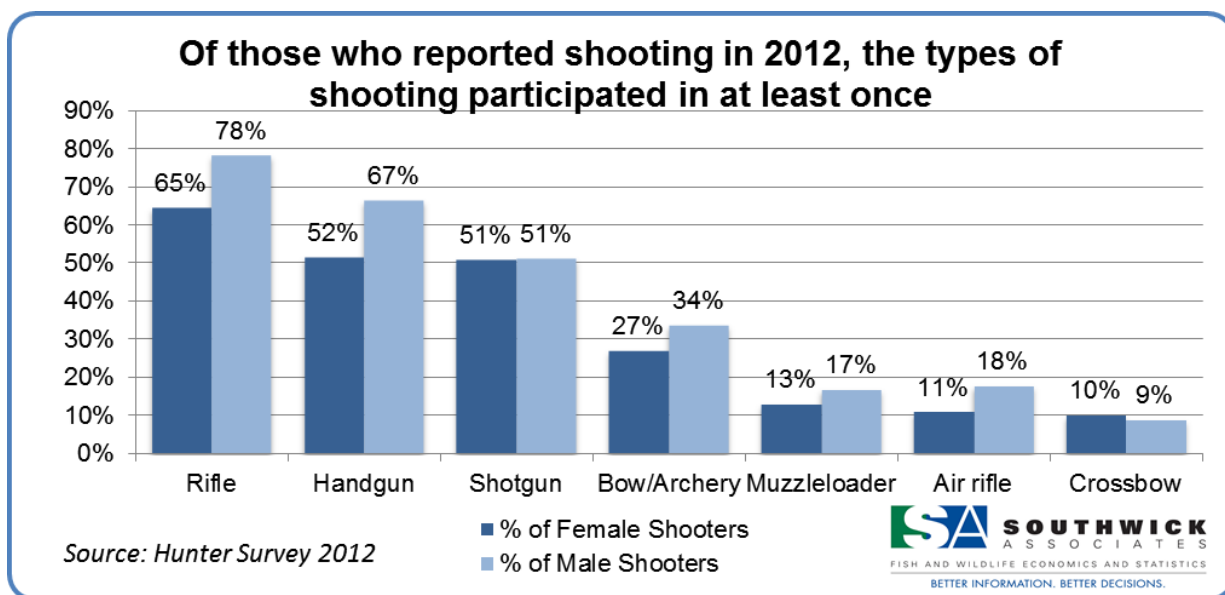


Figure 11. Types of shooting participated in at least once in 2012 for those who reported shooting.

Table 10. Types of shooting activities participated in 2012

	Female Shooters	Male Shooters
Rifle (plinking, benchrest, tactical, cowboy, etc)	64.5%	78.3%
Handgun (plinking, benchrest, silhouette, tactical, cowboy, etc)	51.5%	66.5%
Shotgun	50.9%	51.3%
Bow/Archery	27.1%	33.9%
Muzzleloader	13.1%	17.0%
Air rifle	11.0%	18.0%
Crossbow	10.1%	9.0%
Other	1.4%	2.3%
Total	N=182	N=7,597

Women report rifle shooting as their most frequent shooting activity (65%).

Hunting and Shooting Equipment Purchases

The majority of all hunters and shooters, regardless of gender, reported purchasing ammunition at least once in 2012 (Figure 12 and Table 11). Forty four percent of females purchased hunting accessories and 38% purchased shooting accessories. A slightly smaller percentage of males (40%) purchased hunting accessories and a larger percentage (49%) purchased shooting accessories. An equivalent percentage of females and males purchased hunting apparel. And females are less likely to have purchased a firearm (30% vs. 44%).

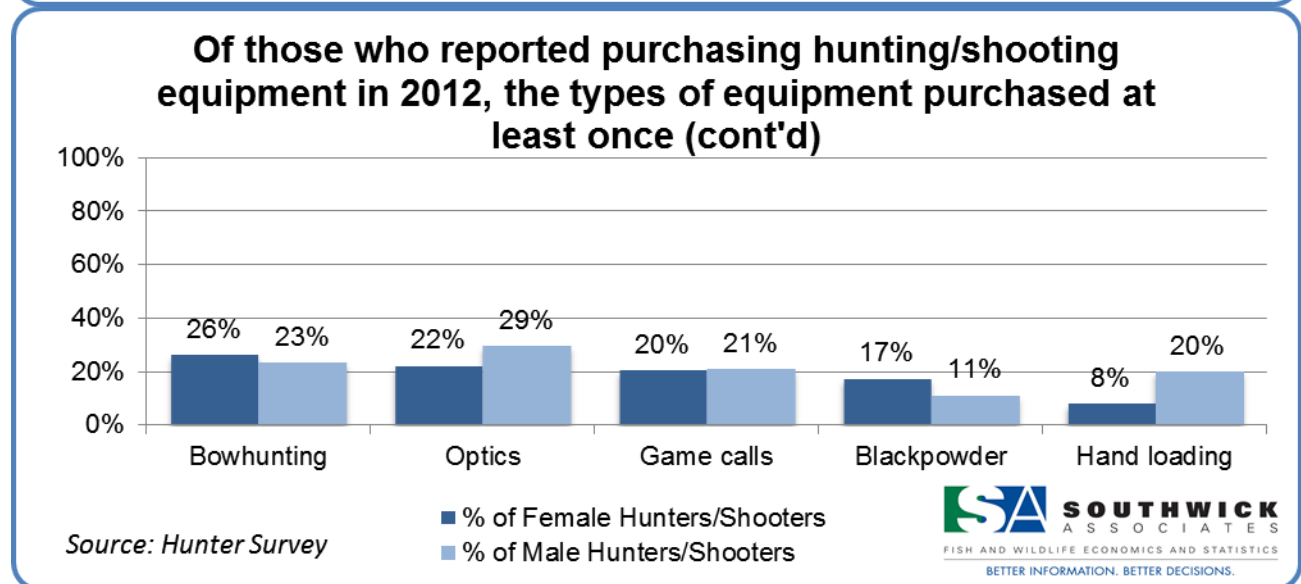
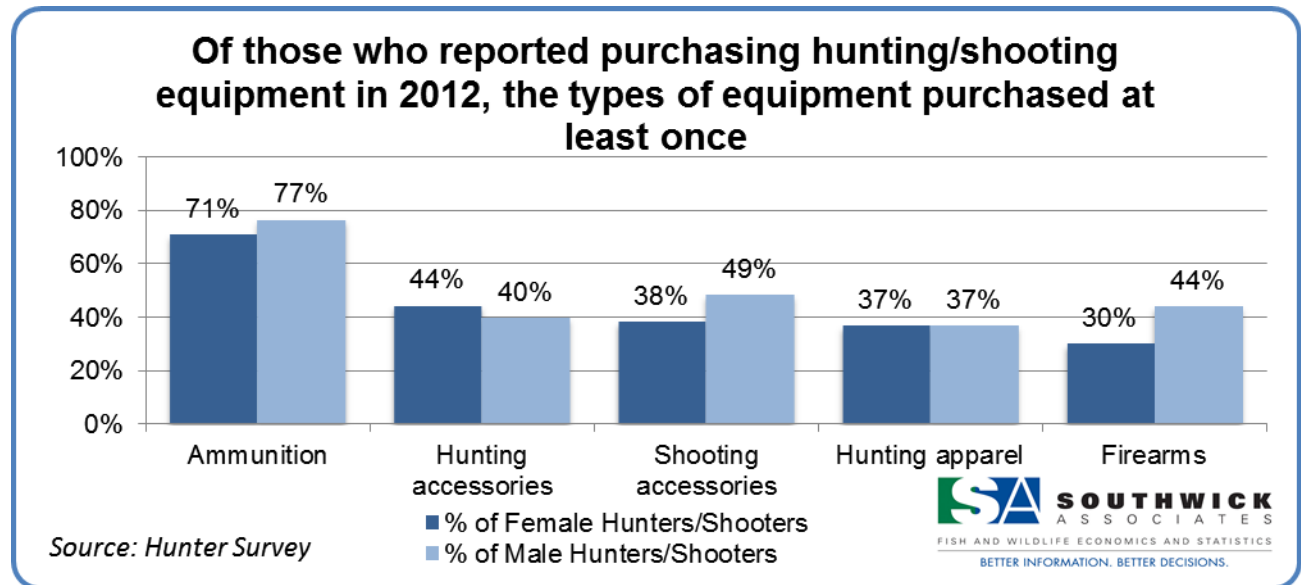


Figure 12. Hunting/shooting equipment purchased at least once in 2012.

Table 11. Hunting/shooting equipment purchased at least once in 2012.

	Female Hunters/Shooters	Male Hunters/Shooters
Ammunition	71%	77%
Hunting accessories	44%	40%
Shooting accessories	38%	49%
Hunting apparel	37%	37%
Firearms	30%	44%
Bowhunting	26%	23%
Optics	22%	29%
Game calls	20%	21%
Blackpowder	17%	11%
Hand loading	8%	20%
Total*	N=174	N=7,179

Women have the highest propensity to purchase ammunition (71%) and hunting accessories (44%).

*Not all hunters/shooters made equipment purchases at least once in 2012. Among responding hunters/shooters, 63% of females and 78% of males report expenditures.

When asked why they spent their time hunting and/or shooting, the highest response for both men and women was that they like to spend time outdoors (85% females, 92% males). One should note that the “enjoy the challenge” option is the lowest ranked reason among women hunters/shooters.

Table 12. Reasons why people chose to spend their time hunting or shooting.

	Female Hunters/ Shooters	Male Hunters/ Shooters
Enjoy the challenge	63.5%	80.1%
Like to spend time outdoors	85.3%	92.4%
Enjoy seeing wildlife	77.4%	87.6%
Enjoy the peace and quiet of the outdoors	80.9%	87.1%
Like to spend time with my friends/family who hunt	67.7%	74.1%
Like providing food for my family/friends	70.8%	70.5%
Other	8.8%	8.8%
Total	N=131	N=4,859



The top reason women choose to spend their time hunting or shooting is to spend time outdoors (85%).

Outdoor Media Consumption

Approximately half of sportswomen turn to magazines and websites to access media for information or entertainment related to hunting, shooting, or fishing (Figure 13 and Table 13). Just under half of sportswomen indicate that they access television program related to hunting, shooting, or fishing. For women, these are much smaller proportions relative to sportsmen indicating that men access these media types at a greater frequency than women. Almost 25% of sportswomen report that they access none of these media types.

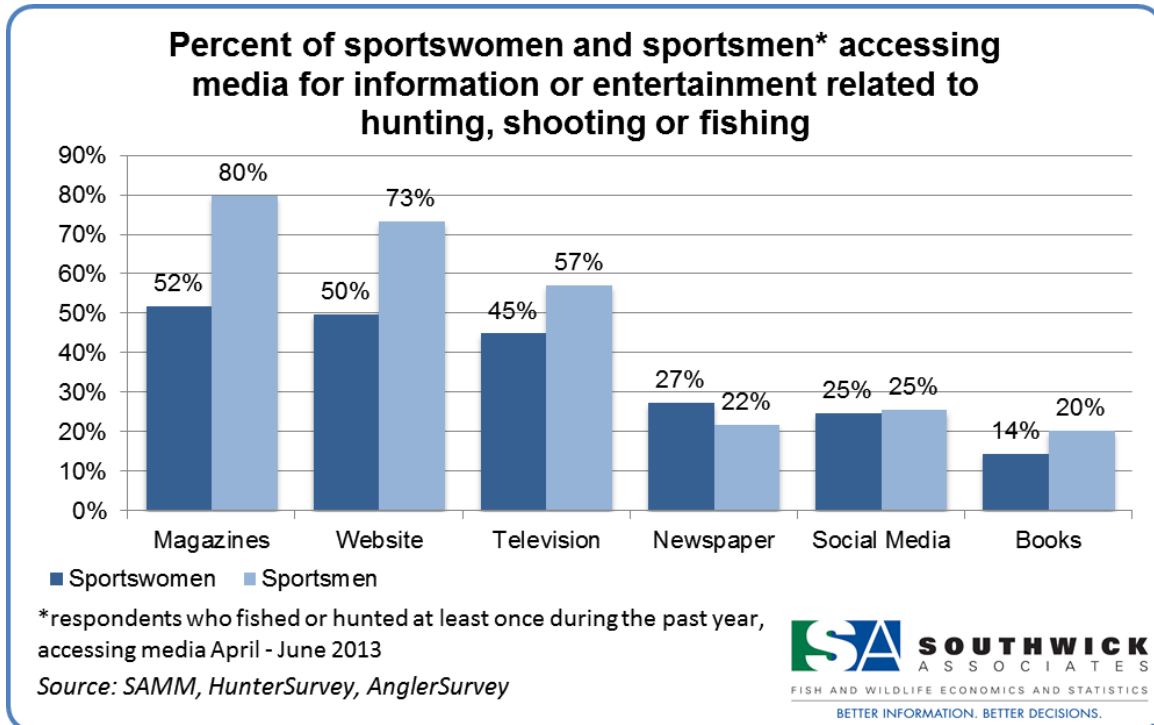


Figure 13. Top six media types accessed for information or entertainment related to hunting, shooting or fishing

Table 13. Types of media sportsmen and sportswomen* accessed for hunting, shooting or fishing information or entertainment in April-June 2013.

	Sportswomen	Sportsmen
Magazines	51.6%	79.6%
Website	49.8%	73.1%
Television	44.8%	57.1%
Newspaper	27.2%	21.7%
Social Media	24.5%	25.4%
Books	14.4%	20.1%
Radio	9.6%	8.0%
Other	0.7%	1.8%
None	24.3%	5.3%
Total	N=141	N=4,812

One quarter of women and men access social media for information and entertainment related to hunting, shooting or fishing.

*Sportsmen and sportswomen defined as those who reported hunting, shooting or fishing at least once in the year between July 2012 and June 2013.