Looking at the Numbers — The Business of Sportfishing

Fishing Tackle Imports Feel the Effects of Economic Slowdown

The effects of the 2008 economic slowdown were felt in almost all business sectors including fishing tackle imports, as reported by the United States International Trade Commission. After years of overall growth, imports fell from an all-time high of $537 million in 2007 to $469.9 million in 2008, a 12.5 percent decrease. From 2002 to 2007, imports grew 35.7 percent.

Most specific tackle categories decreased in annual import value as well. In 2008 fishing reels with a per piece import value greater than $8.45 dropped 12.6 percent compared to 2007. Fishing rods fell 18 percent to $114 million. Fishing reels under $2.70 showed a 40 percent drop from $13 million in 2007 to $7.5 million in 2008. Snelled hooks increased 10.6 percent, however, fishing reel parts increased 7.3 percent.

Many individual countries posted decreases in the value of their fishing tackle shipments to the United States. Here are the trends for the top three importing countries.

Artificial Baits and Flies

Overall, artificial baits and flies imports decreased 10 percent in 2008.

- China—37 percent of all U.S. artificial baits and flies imports, 2008 imports decreased 12 percent to $29 million.
- Estonia—25 percent of all U.S. artificial baits and flies imports, 2008 imports increased 15 percent to $20 million.
- Costa Rica—6 percent of all U.S. artificial baits and flies imports, 2008 imports decreased 18 percent to $5 million.

Fishing Line Imports

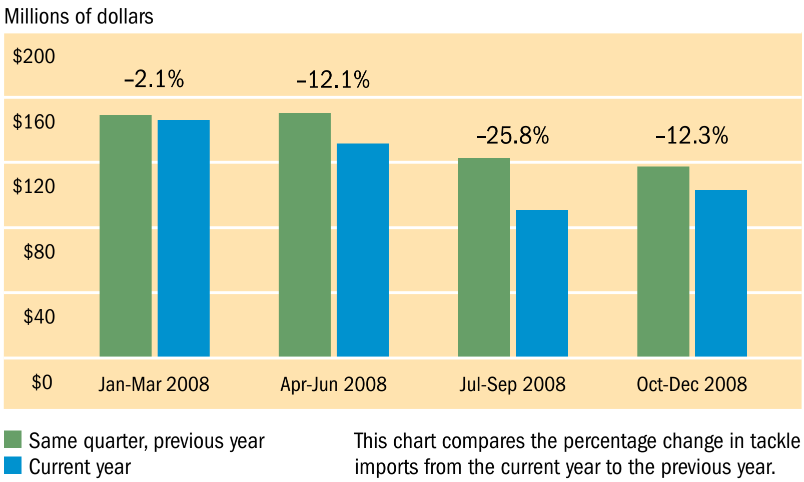
Overall, fishing line imports decreased 7 percent in 2008.

- Japan—31 percent of all U.S fishing line imports, 2008 imports decreased 2 percent to $5 million.
- China—25 percent of all U.S. fishing line imports, 2008 imports increased 4 percent to $4 million.
- Taiwan—20 percent of all U.S. fishing line imports, 2008 imports increased 47 percent to $3 million.

Quarterly Imports: All Fishing Tackle

Fourth quarter fishing tackle import values decreased compared to the same period in 2007. Compared to the third quarter of 2008 imports increased from $90 million to $102 million. In recent years increases from the third to the fourth quarter, however, are common and should not be read as the beginning of a new trend.

Customs value as reported by the U.S. International Trade Commission



This chart compares the percentage change in tackle imports from the current year to the previous year.

Fishing Rod Imports

Overall, fishing rod imports decreased 17.9 percent in 2008.

- China—88 percent of all U.S. fishing rod imports, 2008 imports decreased 16 percent to $100 million.
- Hong Kong—6 percent of all U.S. fishing rod imports, 2008 imports decreased 6 percent to $7 million.
- Korea—3 percent of all U.S. fishing rod imports, 2008 imports decreased 22 percent to $3.3 million.

For details on additional categories, please visit ASA's Web site under Data & Statistics.

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AnglerSurvey: Who Shops Where

During their lifetimes, anglers are likely to visit all types of fishing tackle retailers.

AnglerSurvey, a monthly survey of U.S. anglers produced by Southwick Associates, provides insight into what types of people prefer to shop in specific locations. Anglers self-select to take the survey and its results are weighted to minimize bias.

AnglerSurvey results indicate that:

- Age does not appear to be a major determinant of where people shop.
- Income appears to be a reliable indicator of where people shop.
- The less an angler's income, the more likely that person will shop at a mass merchant.
- Anglers who purchase products at fishing shows or expos have the highest average income, followed by anglers who make purchases at local tackle shops and online.
- Saltwater anglers are more likely to favor their local tackle shop.
- Freshwater anglers are more inclined to shop at mass merchants and outdoor specialty stores.

Service and knowledge often are needed to sell specialized or technical gear, and this requirement dictates where many anglers shop. Price-oriented products (such as combos) sell better at mass merchants compared to technical or specialized items (such as fly reels).

Technical and specialized items also sell better online where more information can be obtained and the selection can be greater. A comparison across a wide range of technical, low-end, durable and disposable fishing products shows similar differences.

AnglerSurvey is a monthly online angler survey. In 2008, 22,500 completed surveys were logged. For more information, contact Rob Southwick, president, Southwick Associates.

Typical customer by type of retailer	Average age	Average income	Percent freshwater anglers	Percent saltwater anglers
Fishing show or expo	44	$69,000	4	5
General sporting goods store	42	$59,000	27	25
Local shop	44	$65,000	35	48
Mass merchant	43	$54,000	44	32
Outdoor specialty store	44	$62,000	52	40
Print catalog	45	$61,000	5	3
Used and resale	42	$59,000	3	3
Web site	43	$65,000	17	15

Percentage of typical purchases by type of retailer	Rods	Rod and reel Combos	Spinner baits	Fly reels
Fishing show or expo	4	1	0.8	5
General sporting goods store	13.5	15	13	6
Local shop	18	8	15	27
Mass merchant	18	32	28	6
Outdoor specialty store	37	36	38	39
Print catalog	1	1	2	2
Used and resale	2	3	0.2	4
Web site	6.5	3	3	11

Fishing Participation on the Increase?

As the recession continues, data suggests that license sales may be on the upswing. A check of license sales in several states in the West, Midwest and Southeast revealed increases by as much as 14 percent compared to 2008.

David Lane, marketing coordinator, Oregon Department of Fish and Wildlife, believes that the 25 percent increase in his state's fishing license sales can be attributed to three factors:

- People are getting back to basics and fishing is an affordable pastime.
- Oregon is anticipating a good salmon runs this year and fishermen's expectations are high.
- Oregon launched an Internet license sales program in November 2008.

Lane said, "While we don't know the exact amount of sales increases attributable to each, we speculate they all have played a significant role in the 2009 upturn."

According to Rob Southwick, Southwick Associates, increases in license sales show that more people are fishing, but without asking them why they are fishing, it is difficult to determine if they are doing it for a food source.

"Increased license sales could be attributed to expanded license sales marketing programs, people looking for a less-costly way to get away from it all by staying home and trying new activities and other reasons," said Southwick. "And many states have catch and release programs, bag limits and seasons that impact when and how many fish may be taken."

For more information about license sales trends, contact Rob Southwick.