**Fishing & Hunting Market 2022**

**Fishing Participation Rate Remains Strong**

Americans were looking for more outdoor activities during the pandemic, which resulted in 2020 having the largest fishing participation rate (18%) since 2007, according to a 2021 report from Outdoor Foundation and the Recreational Boating & Fishing Foundation (RBFF).

The 2020 fishing participation rate increased 9% YOY, or 54.7 million Americans. The American Sportfishing Association’s (ASA) fishing license dashboard (based on 20 reporting states) shows 2021 licenses decreased by 6%, but increased by 5% compared to 2019.

The Outdoor Foundation/RBFF 2021 report also found the fishing participation rates for children 6–12 increased by 15% and teens 13–17 increased by 28% YOY. The 4.8 million Latinx Americans who fished during 2020 was a record and the rate increased 13% YOY.

**Other Outdoor Activities In Which Americans Participate, 2020**

|  |  |  |  |
| --- | --- | --- | --- |
| Other Outdoor Activities | Percent | Other Outdoor Activities | Percent |
| Camping | * 41%
 | * Running and jogging
 | * 25%
 |
| Bicycling | * 31%
 | * Birdwatching/Wildlife viewing
 | * 21%
 |
| Hiking | * 30%
 | * Hunting
 | * 21%
 |

 Outdoor Foundation/Recreational Boating & Fishing Foundation, February 2021

**Hunting Participation Rate Remains Somewhat Constant**

The Outdoor Foundation’s 2021 Outdoor Participation Trends Report mirrored a long-term trend that older adults tend to be hunters, although it is a family activity in many regions. Hunting was not among the top five of most-popular activities for all adults and children.

Participation in the overall hunting category (rifle/shotgun/handgun/bow) decreased slightly from 2019 (5.0%) to 2020 (4.9%) of all persons 6+. Bow, handgun and rifle hunting all remained the same while shotgun decreased from 2019 (2.7%) to 2020 (2.6%).

According to the ASA hunting license dashboard (based on 20 reporting states), participants decreased by only 1% from 2020 to 2021. Most subcategories by gender and age decreased more, only nonresident licenses increased by 14% to offset these other decreases.

**Change in Hunting Licenses in Selected States for**

**All Participants, 2019 to 2020 and 2020 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| State | 2019 to 2020 | 2020 to 2021 | State | 2019 to 2020 | 2020 to 2021 |
| Alabama | * +13%
 | * -11%
 | * Kansas
 | * 0%
 | * +6%
 |
| Florida | * +6%
 | * +3%
 | * Texas
 | * +5%
 | * -4%
 |
| Virginia | * +9%
 | * -3%
 | * New Mexico
 | * +5%
 | * +14%
 |
| Indiana | * +12%
 | * -1%
 | * Oregon
 | * 0%
 | * +1%
 |
| Minnesota | * +3%
 | * -7%
 | * Washington
 | * +7%
 | * -4%
 |

 American Sportsfishing Association, March 2022

**Fishing Tackle Retailers Land the “Big One” During 2021**

The NPD Group reported US fishing equipment sales in stores and online increased 4% for the 12 months ending September 2021. The marine electronics category had the largest increase at 26%, but lines/lures and terminal tackle had the largest share at 40%.

A more recent survey from the ASA and Southwick Associates indicates total fishing tackle sales increased 17.1% YOY for all of 2021, with durable fishing goods increasing 15.8%, consumable fishing goods by 16.8% and soft goods/technical apparel by 10.4%.

Most fishing tackle retailers are very small businesses as 84.1% of survey participants said they had one location and 41.0% said their total 2021 revenues were less than $100,000, 22.9% $100,000–$249,000 and 11.7% $250,000–$499,000.

**Top 5 Factors That Had a Positive Impact on Fishing**

**Tackle Retailers’ 2021 Sales Increase, January 2022**

|  |  |  |  |
| --- | --- | --- | --- |
| Factor | Positive Impact | No Impact | Negative Impact |
| More or less interest in fishing | 62.4% | 33.9% | 3.7% |
| New products | 48.4% | 45.2% | 6.4% |
| Increased population in business’s service area | 44.1% | 52.1% | 3.7% |
| New marketing or business practices | 43.1% | 54.3% | 2.7% |
| COVID-19-related events | 39.5% | 20.0% | 40.5% |

 American Sportsfishing Association and Southwick Associates, March 2022

**Hunting and Shooting Equipment Insights**

A Southwick Associates 2021 survey of more than 11,000 hunter and recreational shooters found Savage was the top brand of traditional rifles, Vortex for scopes, White Flyer for clay targets and Hoppes for gun cleaning accessories.

Southwick Associates conducted an April 2021 survey about ammunition purchases, which indicated 72% of respondents had purchased ammunition during the past 12 months. 75% of respondents were unable to make ammunition purchases because of supply-chain issues.

Of those participating in the survey, 64% said they had less ammunition than their typical supply. Only 17% said they had a sufficient amount while 43% said they would prefer to have much more.

**Reasons Hunters, Recreational Shooters and Firearm Owners**

**Wanted to Increase Their Ammunition Supply, April 2021**

|  |  |
| --- | --- |
| Reason | Percent |
| Uncertainty about future ammunition supplies | 72% |
| Uncertainty about future restrictions on ammunition purchases | 70% |
| Uncertainty about future economic conditions | 54% |
| Want to participate in hunting and target shooting more often | 26% |

 Southwick Associates, June 2021

**Hunting and Fishing Enthusiasts**

The average age of adults 18+ who participated in hunting/fishing during the past 12 months was 44.9, according to analysis of five representative 2021 consumer/market surveys conducted by The Media Audit.

Men’s average age was older than women, or 46 and 42, respectively. Although more women have been participating in hunting and fishing during recent years, both activities still attract many older men, especially hunting.

With more young adults having joined the ranks of anglers recently, compared to hunters, Millennials over-indexed on average at 109 and Gen Zers at 105 for these combined activities, while older Boomers also over-indexed on average at 108.

**Indices of Adults 18+ Who Participated in Hunting/Fishing Activities**

**During the Past 12 Months by Other Activities, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Activity | Southern New Hampshire\* | Minneapolis-St. Paul | Little Rock | Denver | Portland, OR |
| Biking/Cycling | * 124
 | * 176
 | * 145
 | * 141
 | 149 |
| Boating/Sailing | * 242
 | * 278
 | * 277
 | * 129
 | * 213
 |
| Camping | * 325
 | * 220
 | * 179
 | * 260
 | * 189
 |
| Hiking | * 170
 | * 170
 | * 109
 | * 175
 | * 174
 |
| Jogging/Running/Walking | * 86
 | * 115
 | * 108
 | * 113
 | * 115
 |
| Swimming | 145 | * 181
 | * 107
 | * 156
 | * 175
 |
| Water skiing/tubing | * 92
 | * 253
 | * 69
 | * 102
 | * 260
 |

Based on The Media Audit’s 2021 surveys \*Belknap, Cheshire, Hillsborough, Merrimack, Rockingham and Stafford counties

**In Search of Hunters and Anglers in Media**

The Media Audit’s consumer/market surveys cited above reveal adults 18+ who participated in hunting/fishing during the past 12 months over-indexed much more, on average, for “active” media, such as radio at 141, outdoor at 140 and audio streaming at 126.

Conversely, they under-indexed for TV at an average of 90 and over-indexed slightly for the Internet at an average of 103. They over-indexed at an average of 122 for newspaper, which is because many of these adults are older.

**Indices of Adults 18+ Who Participated in Hunting/Fishing**

**Activities During the Past 12 Months by Their Heavy Exposure**

**to Digital Media, in Selected Markets, 2021**

|  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- |
| Media | Southern New Hampshire\* | Minneapolis-St. Paul | Little Rock | Denver | Portland, OR |
| Internet | * 116
 | * 100
 | * 103
 | * 102
 | * 92
 |
| Social Media | * 136
 | * 124
 | * 95
 | * 91
 | * 107
 |
| Audio streaming | * 151
 | * 121
 | * 122
 | * 141
 | * 94
 |
| Podcast listening | 119 | * 101
 | * 96
 | * 104
 | * 157
 |
| Video streaming | * 104
 | * 103
 | * 109
 | * 121
 | * 108
 |

Based on The Media Audit’s 2021 surveys (see page four for heavy exposure amounts)

\*Belknap, Cheshire, Hillsborough, Merrimack, Rockingham and Stafford counties

**More Valuable Insights**

The table of data from The Media Audit at the top of page 3 shows adults 18+ who participated in hunting and fishing over-indexed, on average, at 250 for those who also participated in boating/sailing activities during the past 4 weeks. Since many people who fish do so from a boat, this strong correlation is no surprise.

Nonetheless, boat dealers have experienced the same supply-chain/inventory issues as RV dealers and outdoor activities retailers. Boat dealers sold more than 300,000 new powerboats during 2021, which was only the second year of the past 15 exceeding that total. Because dealers had few boats to supply the large demand, 2021 sales of the four largest segments of powerboats anglers are more likely to own all decreased.

**Selected Segments of Powerboat Sales for 2021**

|  |  |  |
| --- | --- | --- |
| Powerboats Segment | 2021 | YOY Change |
| Aluminum fishing | * 47,463
 | * -8.0%
 |
| Pontoons | * 62,787
 | -4.7% |
| Outboard (inshore/offshore) | * 62,859
 | -5.9% |
| Outboard (bowrider/deck) | * 8,048
 | -21.1% |

 *Trade Only Today* (Statistical Surveys), February 2022

**The Media Audit: Heavy Exposure to Media, 2021**

|  |  |
| --- | --- |
| Media | Time |
| Radio | 180+ minutes during an average day |
| TV | 300+ minutes during an average day |
| Newspaper | 60+ minutes during an average day |
| Outdoor | 200+ miles during an average week |
| Direct mail | 75+ read weekly |
| Internet | 180+ minutes during a typical day |
| Social media | 180+ minutes during a typical day |
| Audio streaming | 180+ minutes during an average day |
| Podcast listening | 180+ minutes during a typical day |
| Video streaming | 180+ minutes during an average day |

*Sources:* Outdoor Foundation and the Recreational Boating & Fishing Foundation Website, 3/22; American Sportfishing Association Website, 3/22; Outdoor Industry Association Website, 3/22; The NPD Group Website, 3/22; Southwick Associates Website, 3/22; The Media Audit Website, 3/22; *Trade Only Today* Website, 3/22.

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**Local Market and Station Information**