SPORTFISHING AND HUNTING IN MAINE:

ECONOMIC CONTRIBUTIONS AND MARKET INSIGHTS

AUGUST 18, 2015

SOUTHWICK ASSOCIATES

FISH AND WILDLIFE ECONOMICS AND STATISTICS

OVERVIEW

Sportfishing and Hunting

- Participation and trends
- Economic contributions
- Trip characteristics
- Market insights

Surveys

- Angler survey – online, August 2014
  - Any angler who purchased a license 2009-2013
    - Resident responses: 6,827 = 13% response rate
    - Nonresident responses: 8,181 = 17% response rate
- Hunter survey – online, August 2014
  - Any angler who purchased a license 2009-2013
    - Resident responses: 5,496 = 17% response rate
    - Nonresident responses: 3,530 = 23% response rate

Surveys

- Non-Maine sportsmen survey
  - Hunters and anglers who travel outside of their home state to fish or hunt but never in Maine
  - Sample provided by Survey Sampling International
  - Proportional sample drawn for Maine's primary market area for nonresident hunters and anglers
  - 580 Traveling anglers; 101 Traveling hunters

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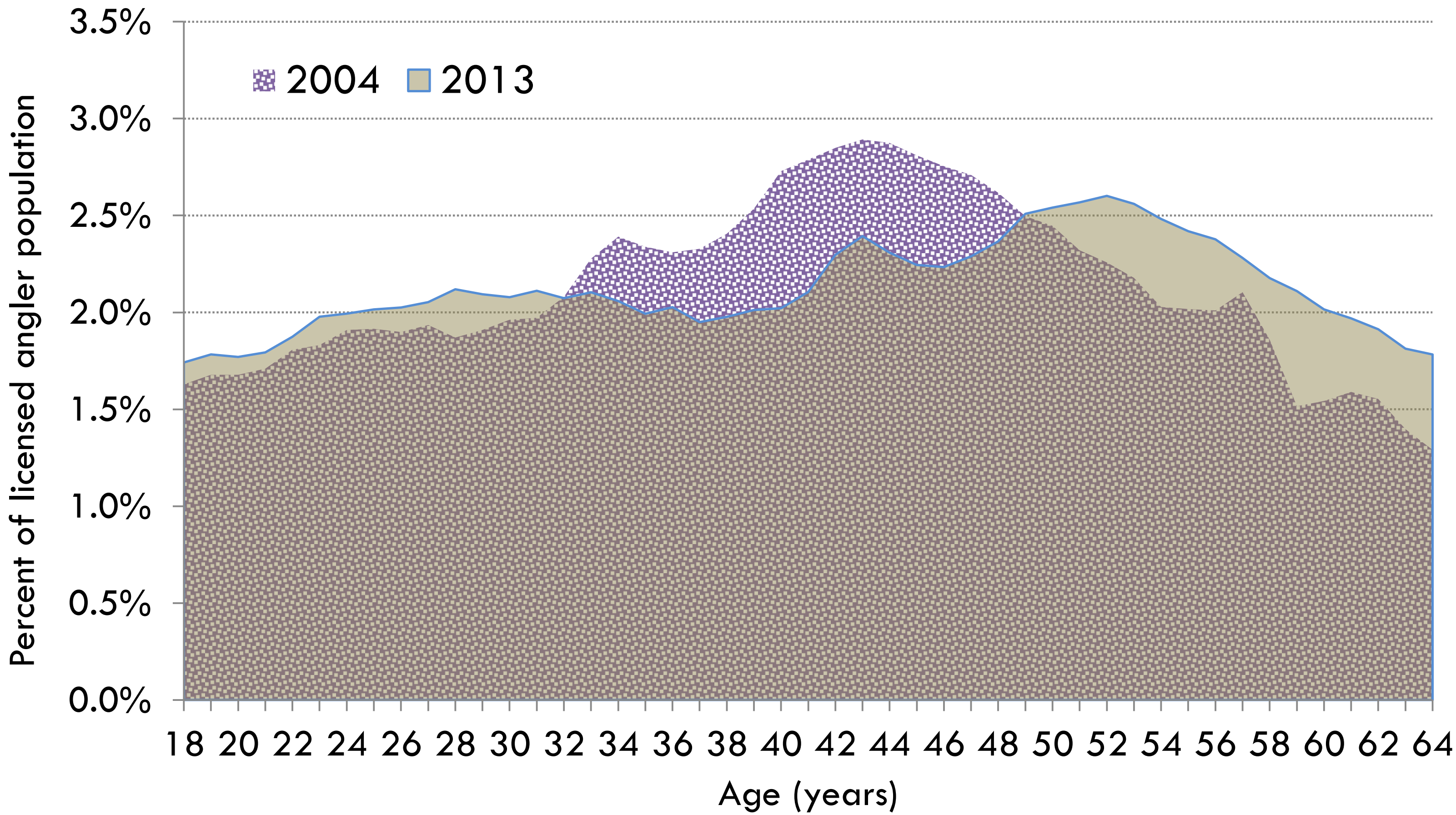
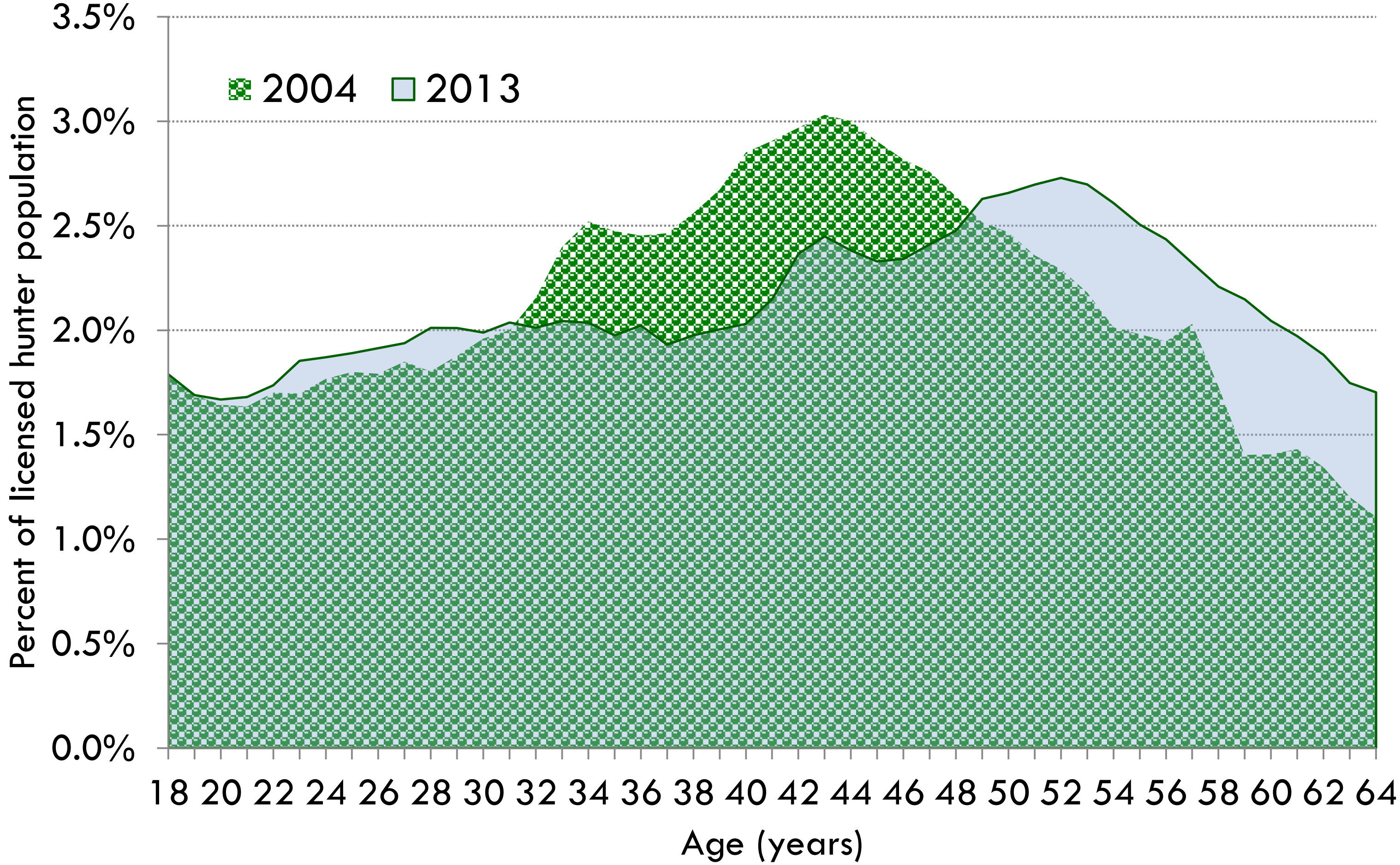
Participation & Trends

- Number of participants and trends
- Frequency of fishing and hunting
- Regional activity

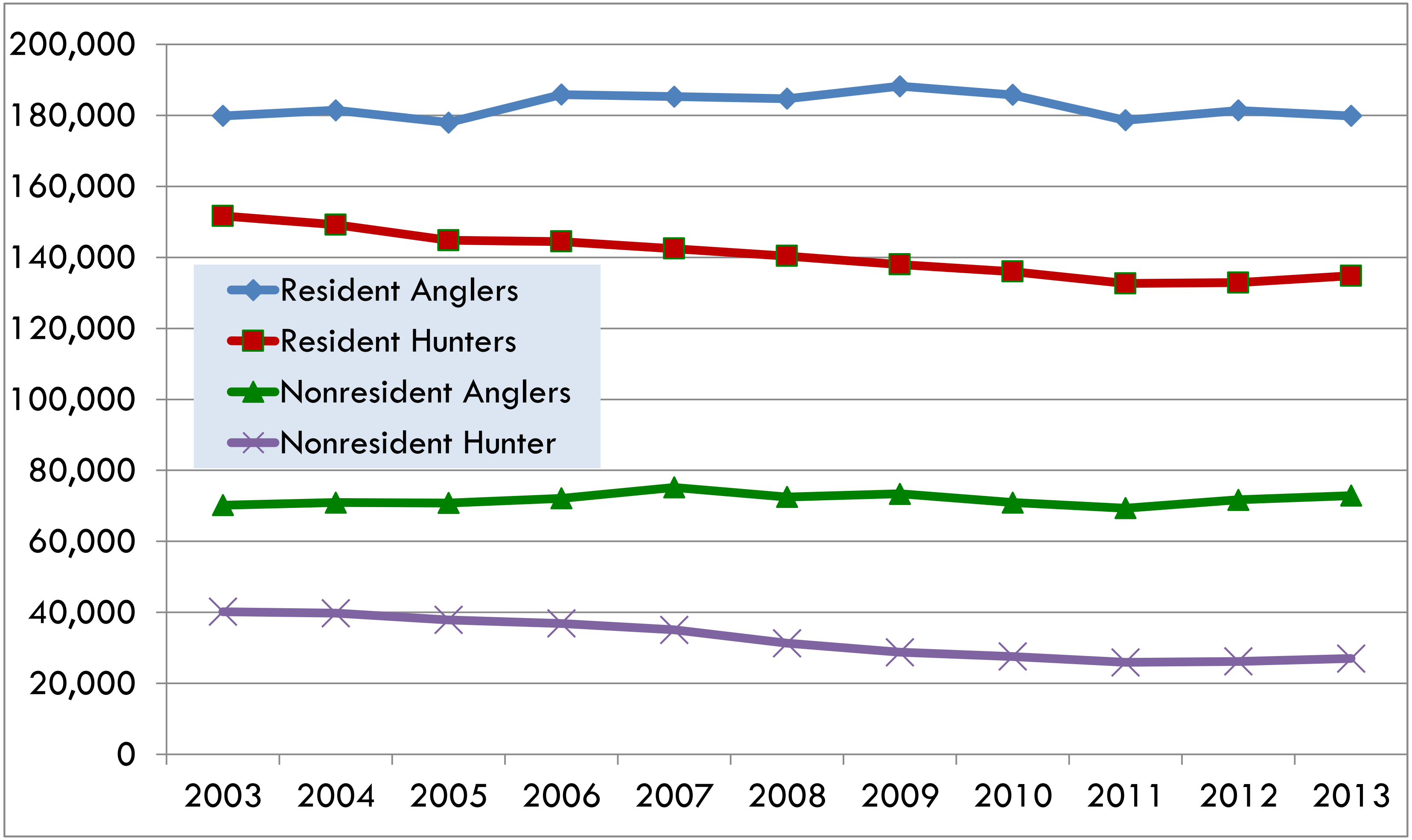
Age Distribution of US Anglers, 2004-2013



Age Distribution of US Hunters, 2004-2013



Maine Anglers and Hunters



Source: Maine fishing and hunting license sales records

Maine Anglers and Hunters:

Percent change 2004 to 2013

	Residents		Nonresidents	
	Anglers	Hunters	Anglers	Hunters
Under 35	0.7%	-12.9%	0.6%	-40.5%
35 to 55	-14.6%	-19.2%	-15.7%	-45.9%
55 and older	32.9%	21.3%	37.5%	-3.8%
TOTAL	**-0.9%**	**-9.6%**	**2.8%**	**-32.1%**

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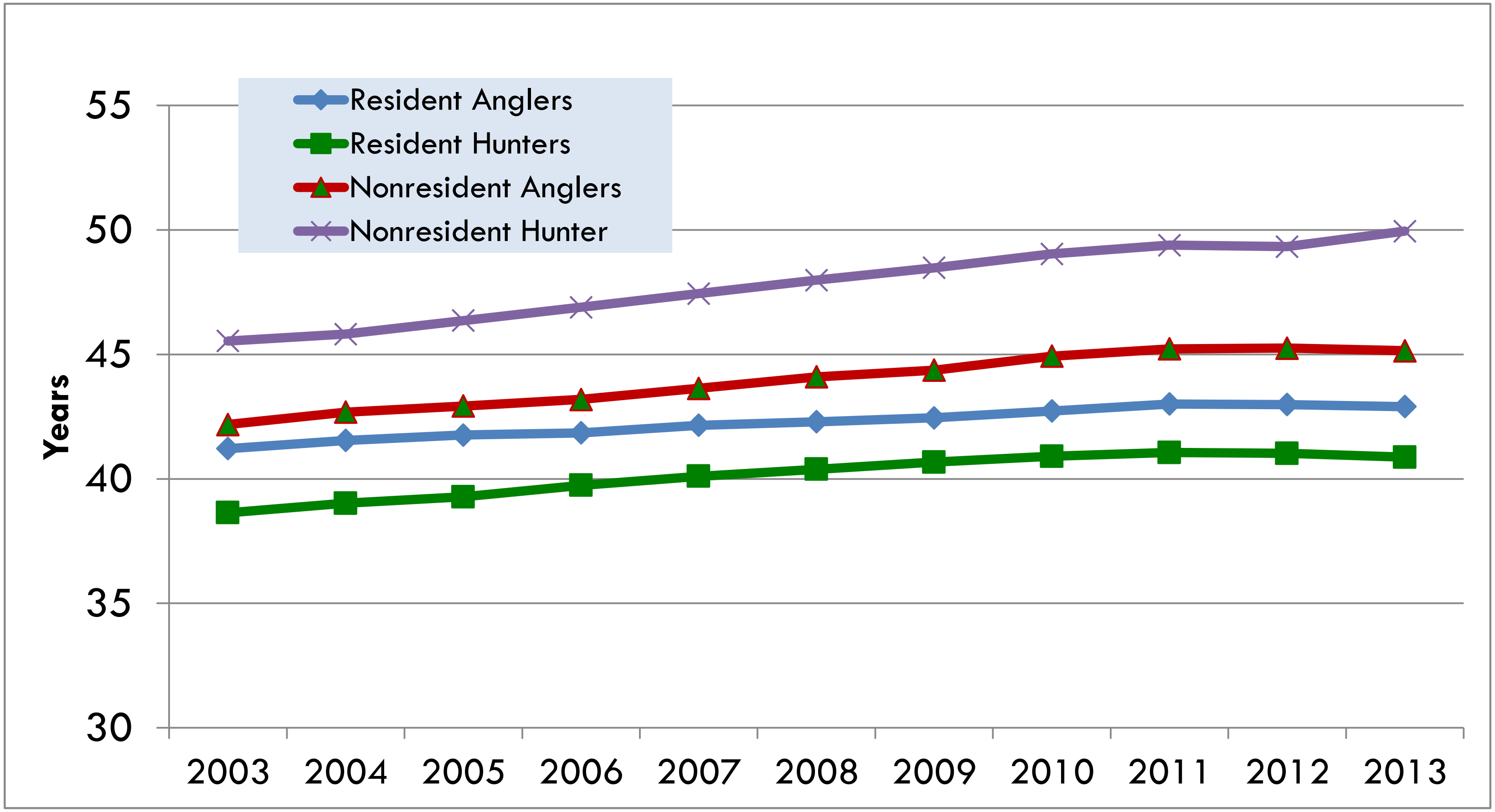
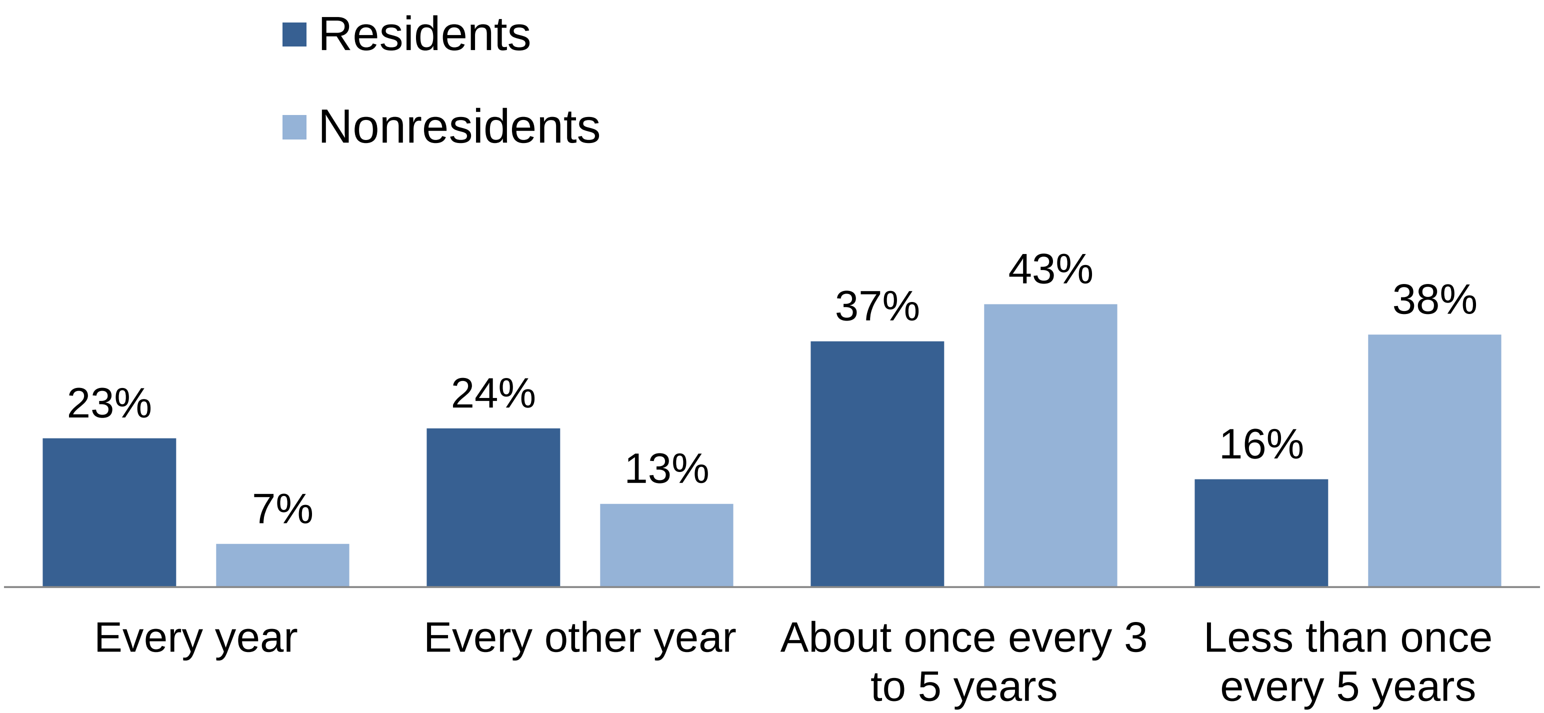
Maine Anglers and Hunters:

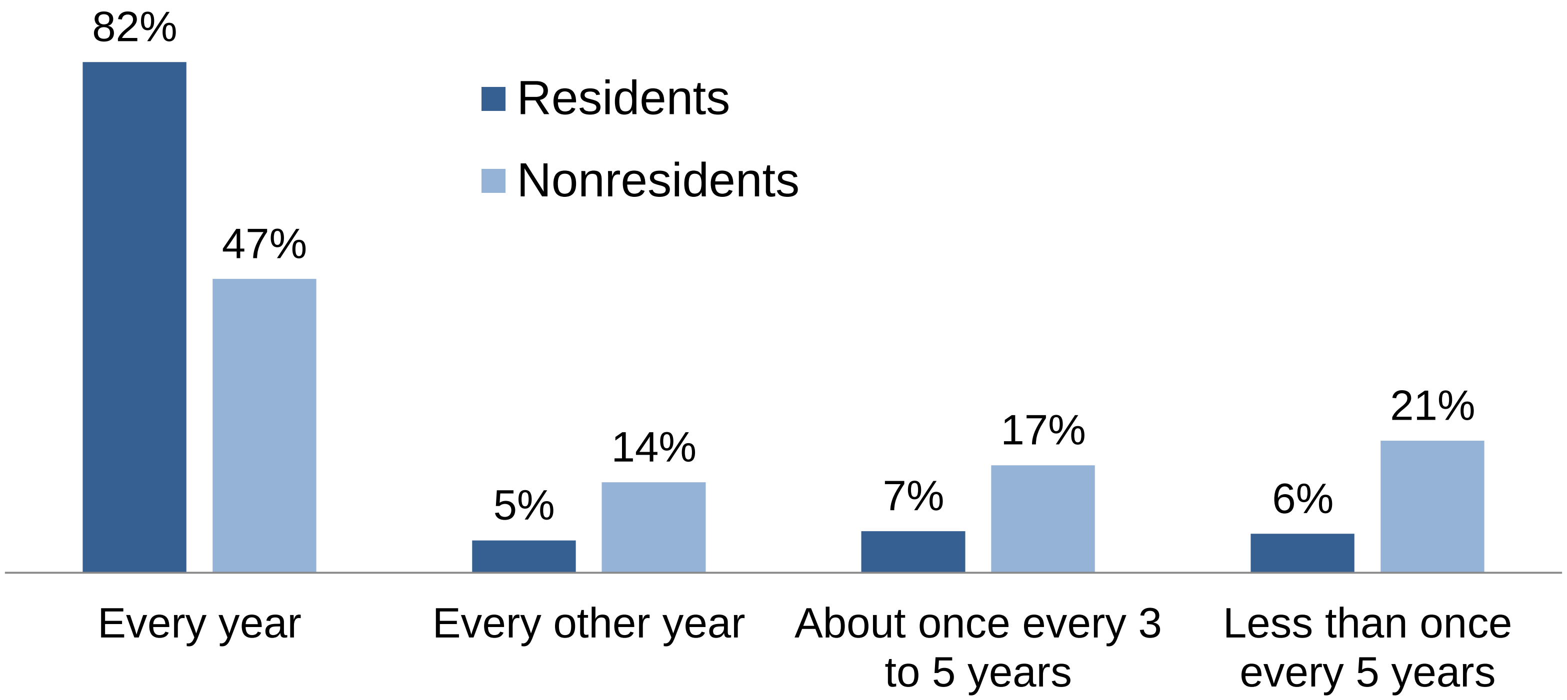
Average age 2003 to 2013



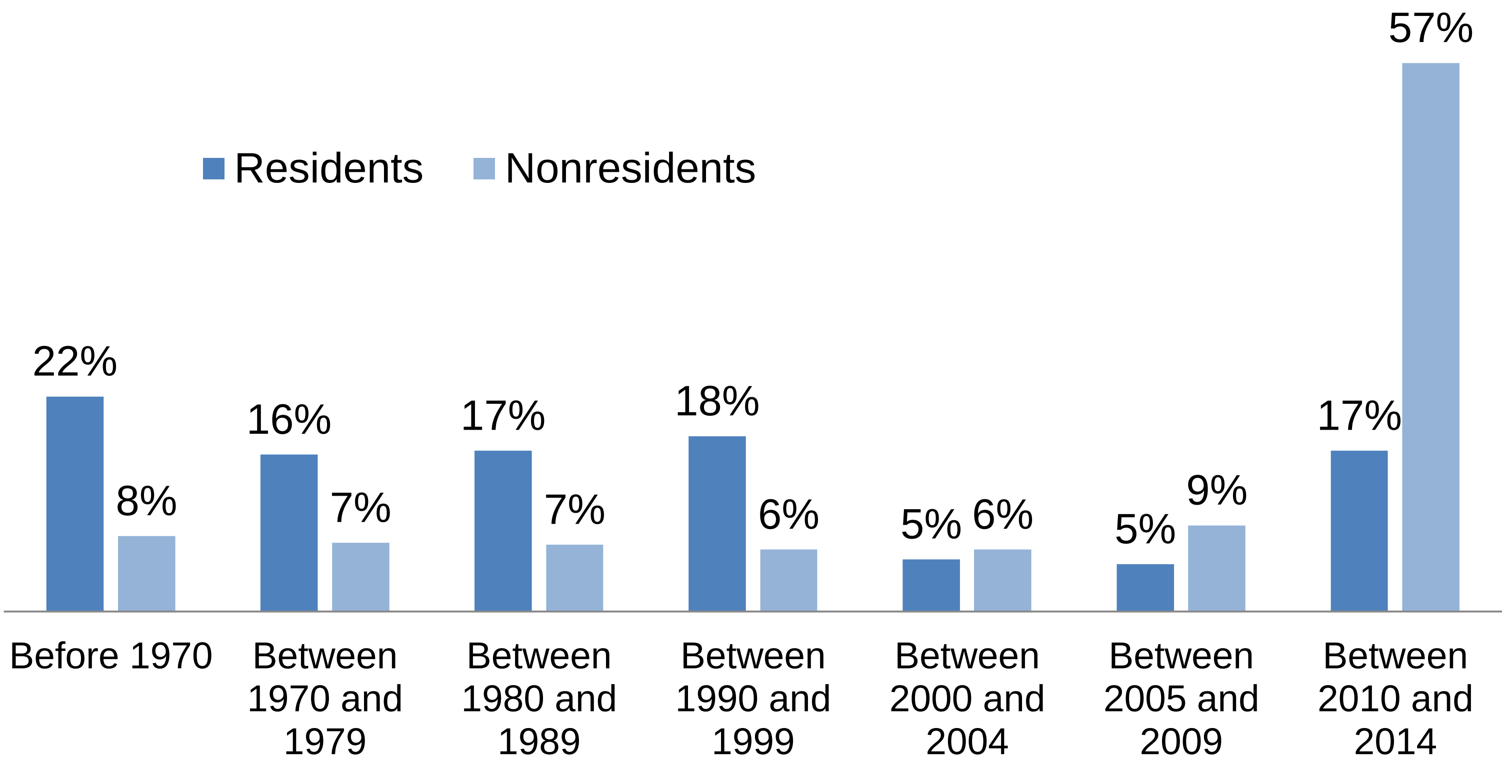
Fishing Frequency



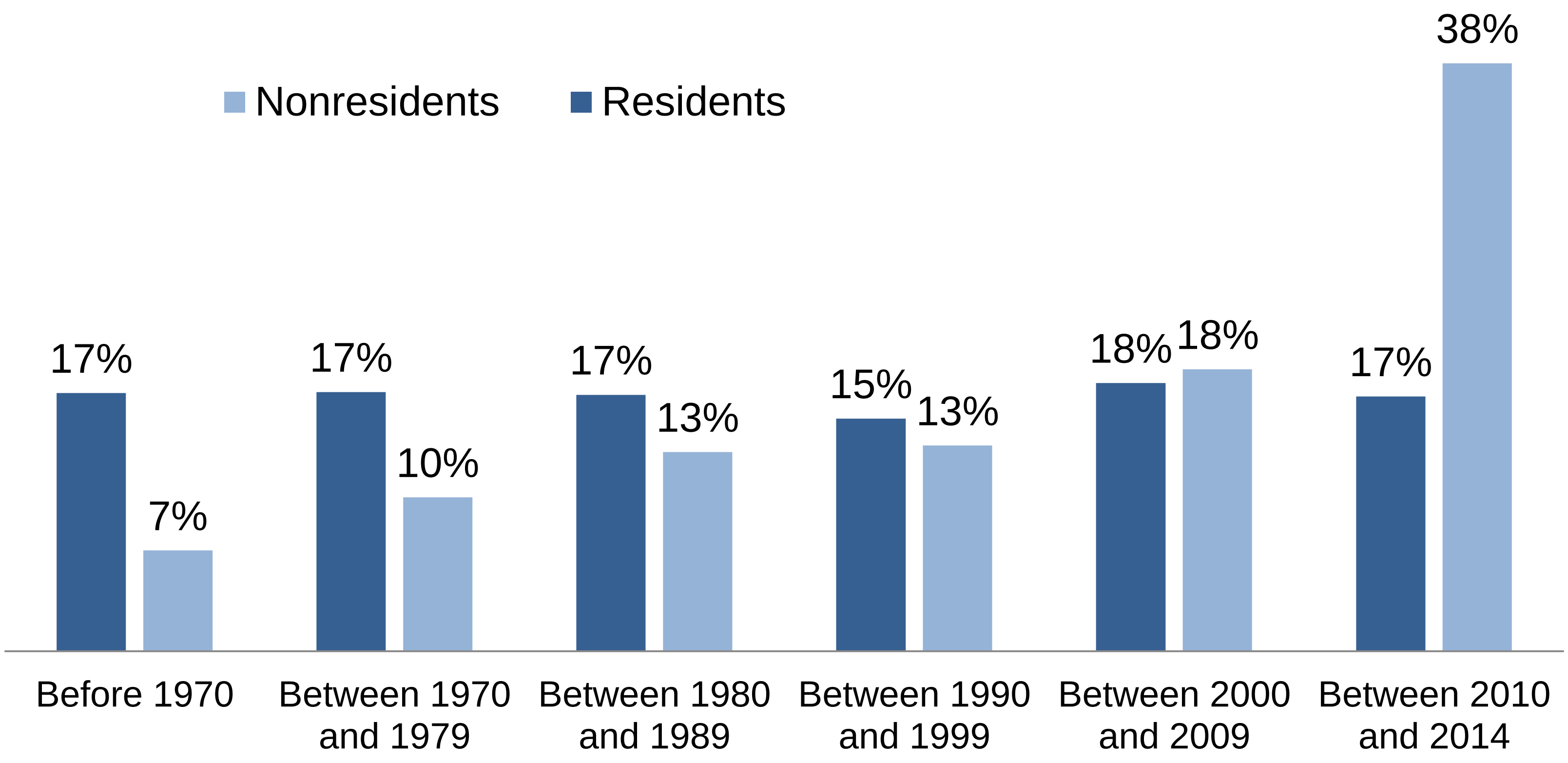
Hunting Frequency



Start of fishing in Maine



Start of hunting in Maine



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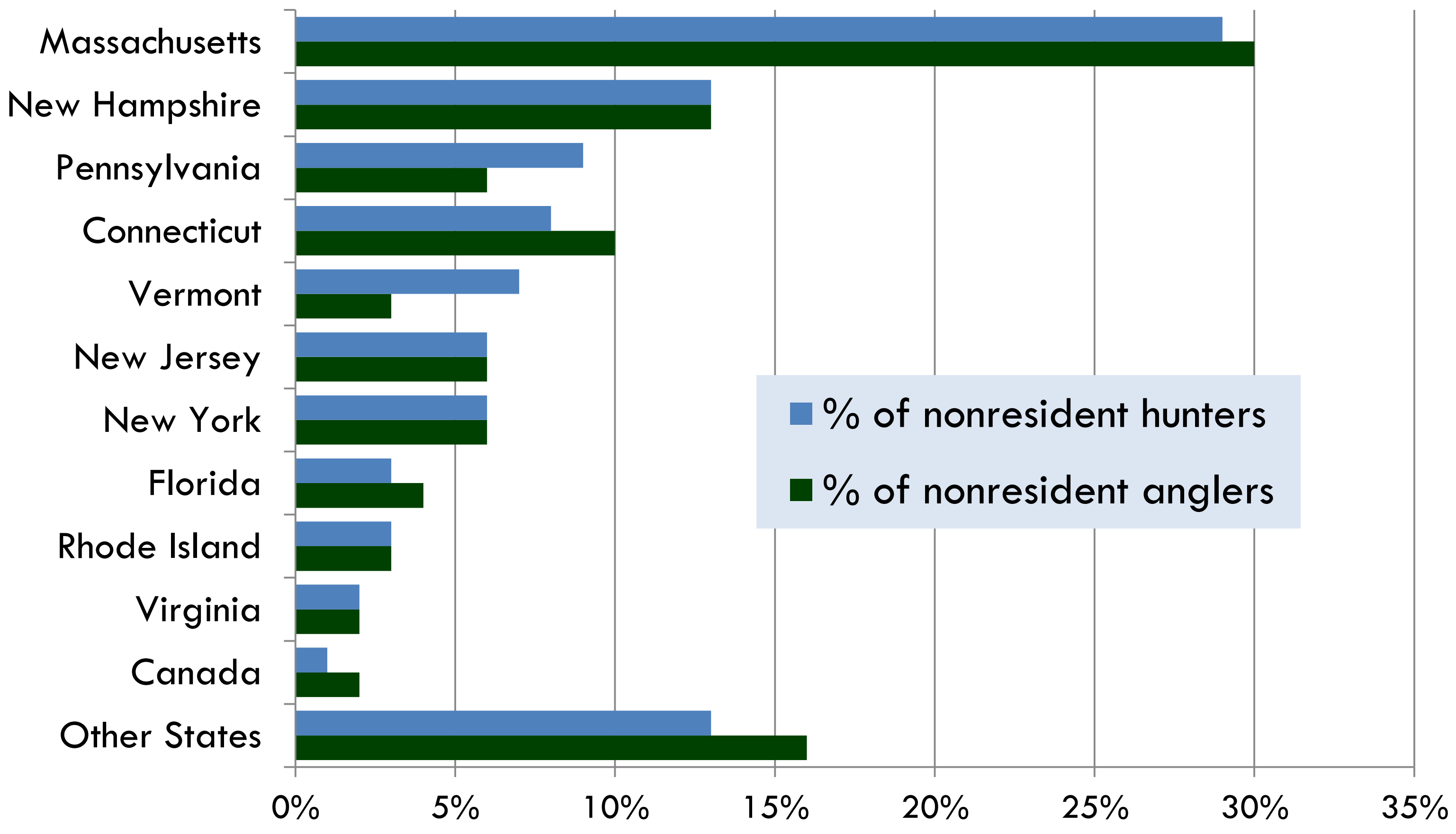
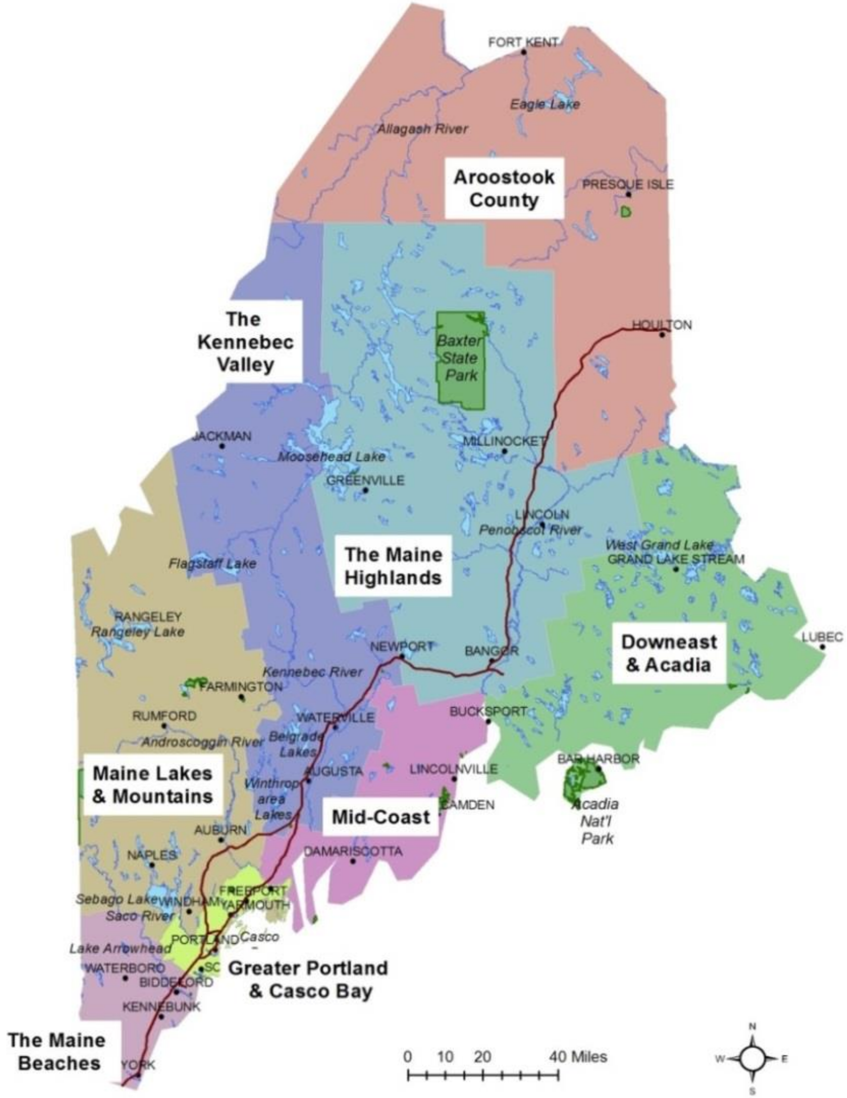
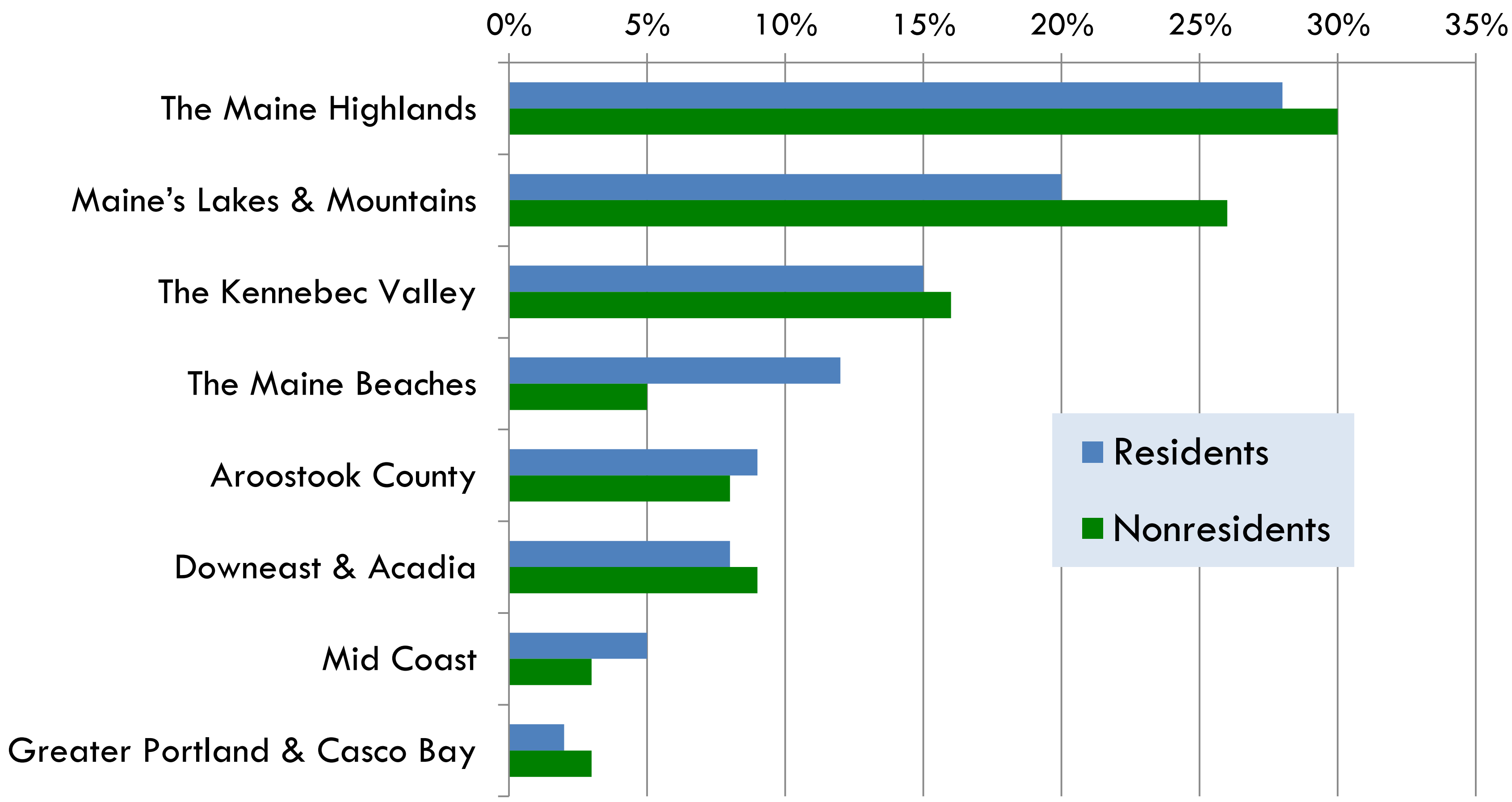
Source of nonresident sportsmen



Maine Tourism Regions



Overnight fishing trips



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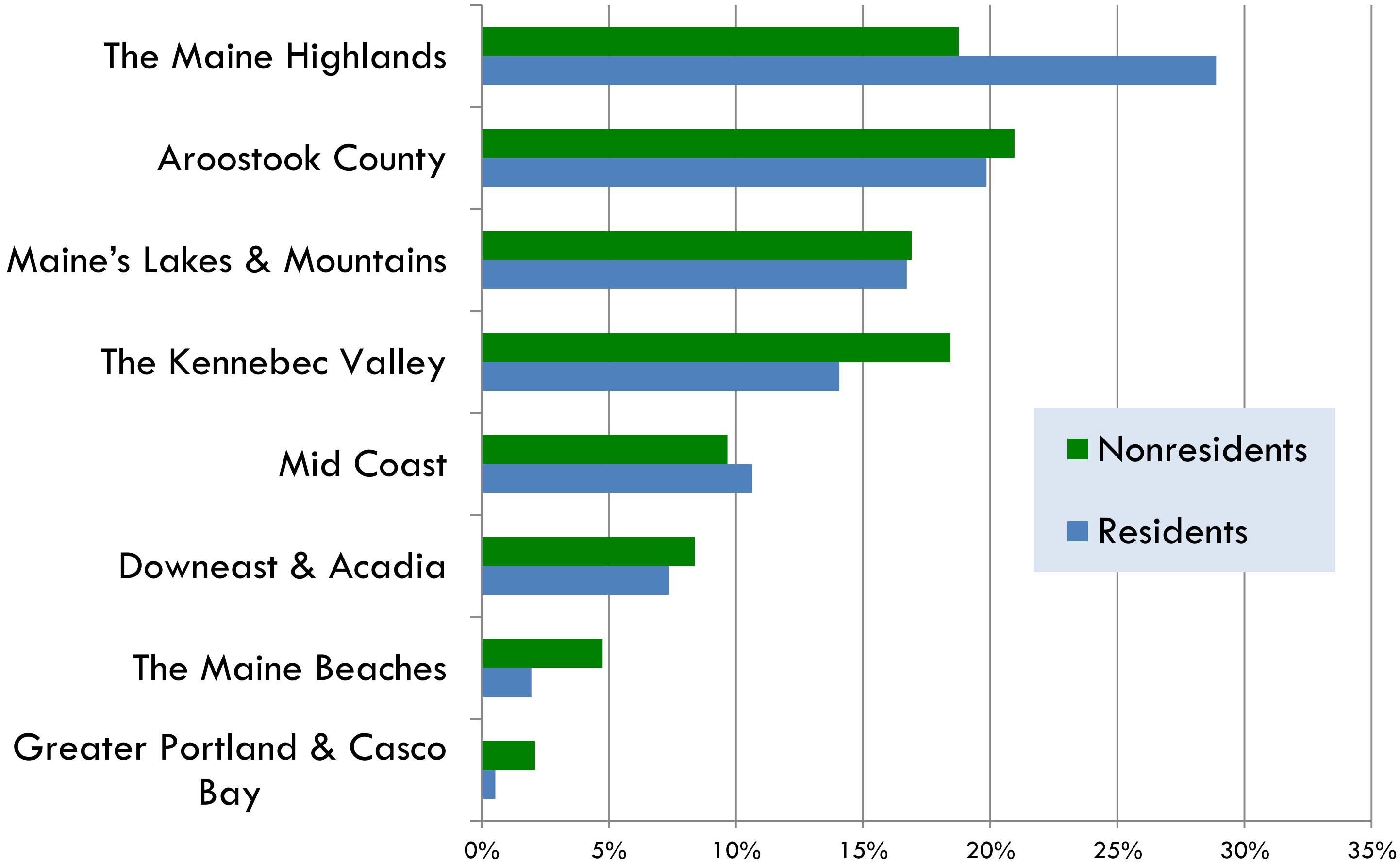
Overnight hunting trips



Economic contributions

- Spending
- Economic contributions
- Regional impacts

Economic Contributions*

	Participants	Spending	Jobs	Income
Anglers	**258,774**	**$209 million**	**3,330**	**$104 million**
Residents	188,126	$175 million	2,733	$86 million
Nonresidents	70,648	$34 million	597	$18 million
Hunters	**162,075**	**$232 million**	**3,431**	**$116 million**
Residents	133,925	$190 million	2,727	$94 million
Nonresidents	28,150	$42 million	704	$22 million
TOTAL	**420,849**	**$441 million**	**6,761**	**$220 million**

**Based on outings where the primary purpose was to fish or hunt.*

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Average annual spending

	Resident	Nonresident	Total
FISHING			
Trip expenditures	$463	$736	$516
Fishing equipment	$247	$220	$242
Auxiliary, special, & other equipment	$467	$87	$395
Total	**$1,177**	**$1,043**	**$1,154**
HUNTING			
Trip expenditures	$463	$985	$554
Hunting equipment	$302	$262	$295
Auxiliary, special, & other equipment	$651	$243	$580
Total	**$1,416**	**$1,490**	**$1,429**

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Total annual spending

	Resident	Nonresident	Total
FISHING			
Trip expenditures	$ 68.9 million	$ 23.9 million	$ 92.7 million
Fishing equipment	$ 36.7 million	$ 7.1 million	$ 43.8 million
Auxiliary, special, & other equipment	$ 69.4 million	$ 2.8 million	$ 72.2 million
Total	**$ 175.0 million**	**$ 33.9 million**	**$ 208.8 million**
HUNTING			
Trip expenditures	$ 62.0 million	$ 27.7 million	$ 89.8 million
Hunting equipment	$ 40.5 million	$ 7.4 million	$ 47.9 million
Auxiliary, special, & other equipment	$ 87.1 million	$ 6.8 million	$ 94 million
Total	**$ 189.7 million**	**$ 41.9 million**	**$ 231.6 million**
TOTAL	**$364.7 million**	**$ 75.8 million**	**$440.5 million**

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Economic contributions

	Residents	Nonresidents
Spending	$ 365 million	$ 76 million
Output	$ 433 million	$ 93 million
Value Added	$ 238 million	$ 52 million
Jobs	5,460	1,301
Income	$ 180 million	$ 40 million

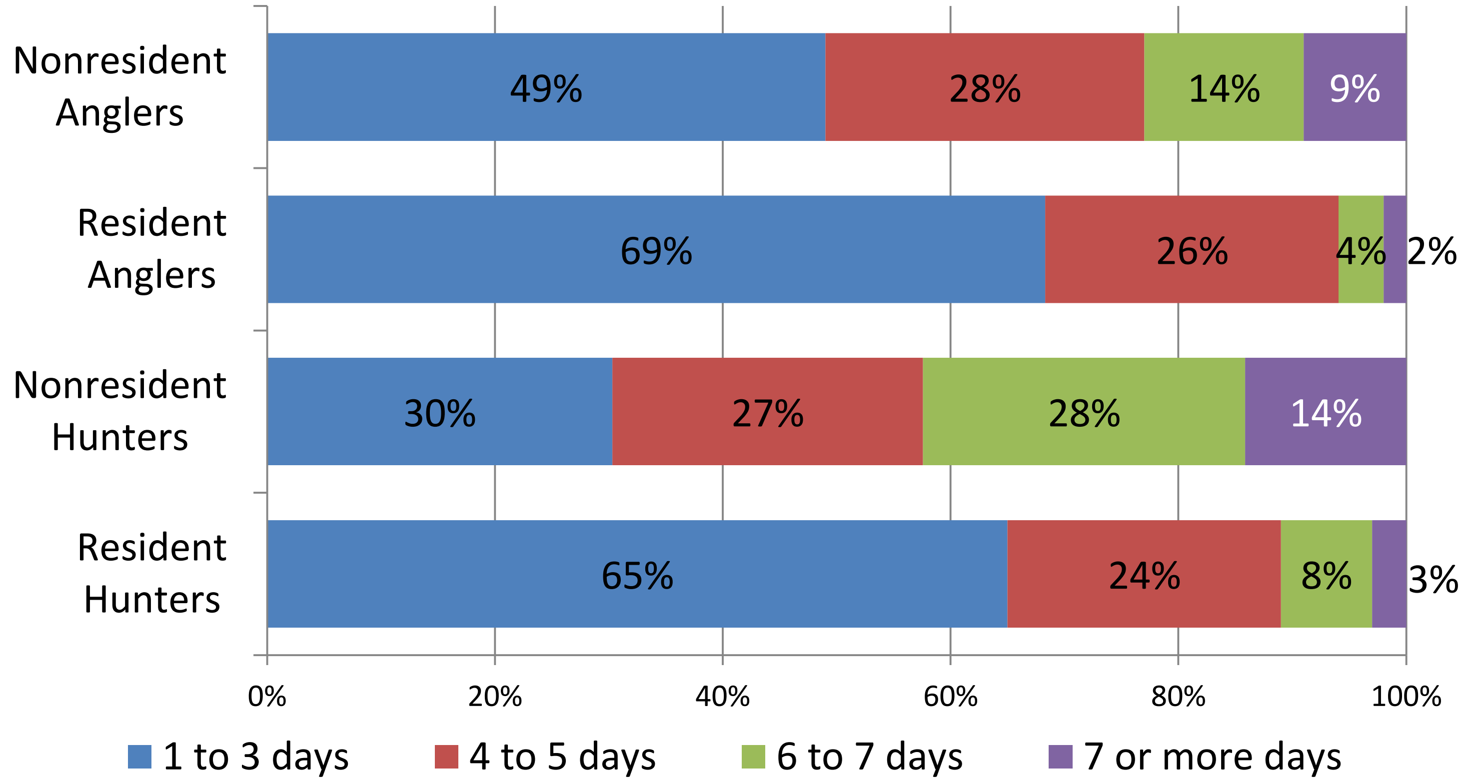
Regional job impacts of fishing & hunting

Region	Nonresident	
	Fishing	Hunting
Aroostook County	13%	25%
The Maine Highlands	23%	22%
Maine's Lakes & Mountains	22%	18%
The Kennebec Valley	15%	13%
Downeast & Acadia	10%	10%
The Maine Beaches	9%	6%
Mid Coast	3%	4%
Greater Portland & Casco Bay	4%	3%
TOTAL JOBS	**598**	**704**

Trip characteristics

- Trip length
- Accommodations
- Trip planning
- Satisfaction

Length of overnight trips



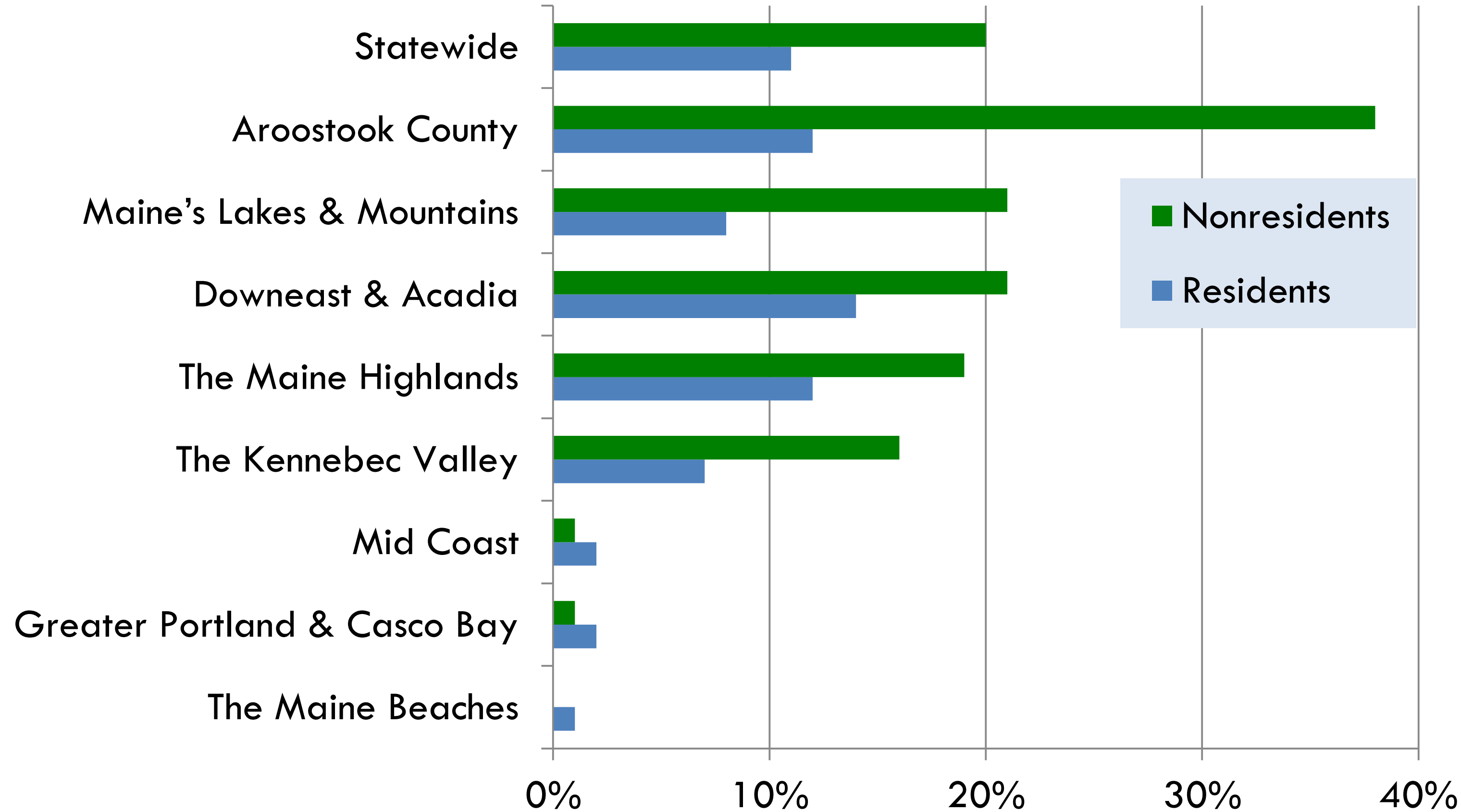
Accommodations used by anglers

	Residents	Nonresidents	Travelers
Paid Accommodations	**49%**	**70%**	**75%**
Hotel, motel, resort	5%	10%	40%
Rented lodging	24%	28%	25%
Campground or RV part	14%	18%	14%
Sporting or wilderness camp or lodge	11%	20%	7%
Unpaid Accommodations	**51%**	**31%**	**30%**
Lodging owned by respondent	16%	5%	6%
Relative or associate's lodging	31%	25%	21%
A free campground or campsite	17%	5%	3%
Other unpaid accommodation	10%	2%	2%

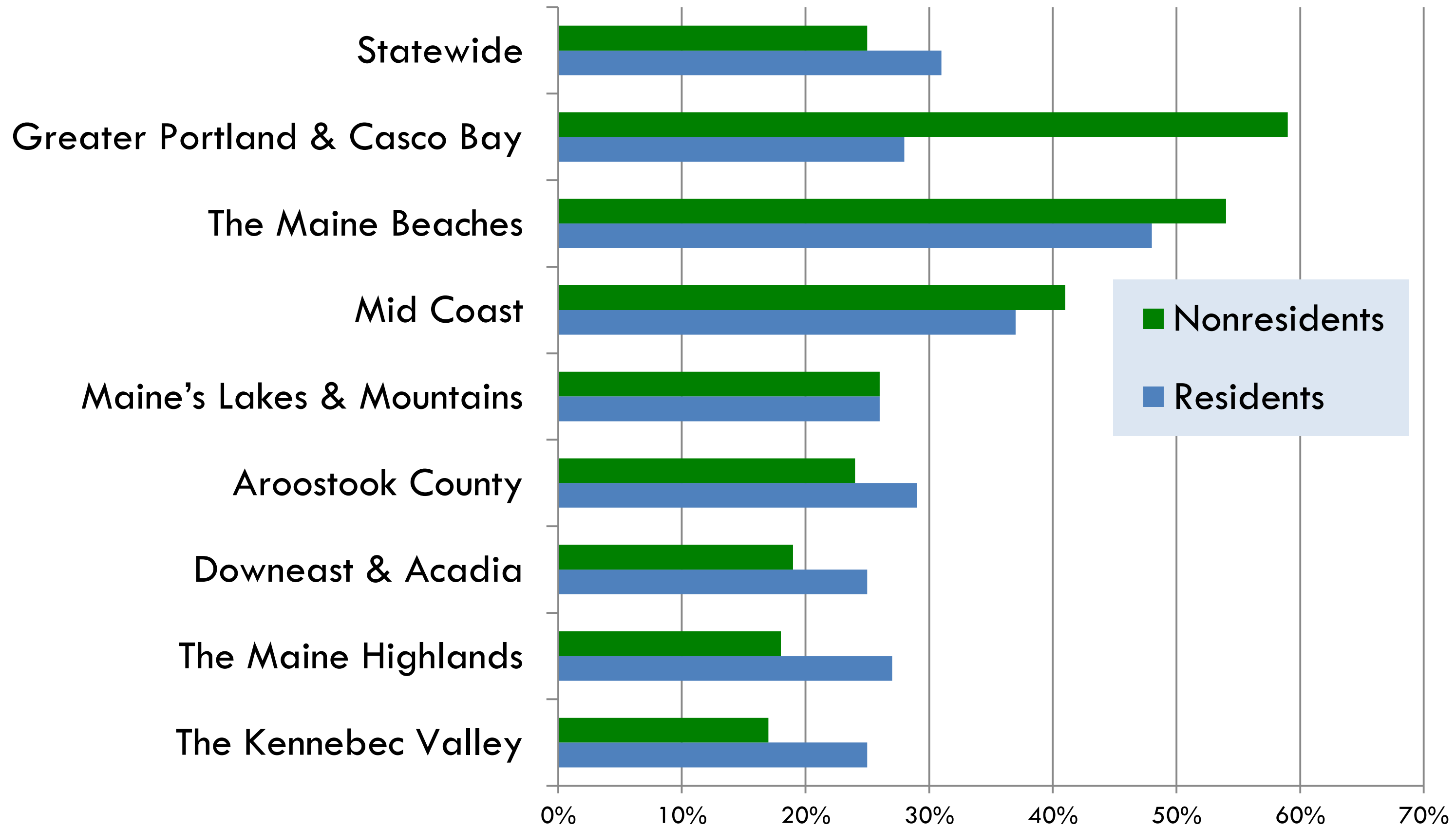
Accommodation used by hunters

	Residents	Nonresidents	Travelers
Paid Accommodations	**34%**	**53%**	**63%**
Hotel, motel, resort	6%	7%	29%
Rented lodging	15%	14%	19%
Campground or RV part	6%	1%	4%
Sporting or wilderness camp or lodge	11%	31%	13%
Unpaid Accommodations	**69%**	**51%**	**45%**
Lodging owned by respondent	24%	14%	8%
Relative or associate's lodging	47%	35%	27%
A free campground or campsite	8%	1%	2%
Other unpaid accommodation	6%	3%	11%

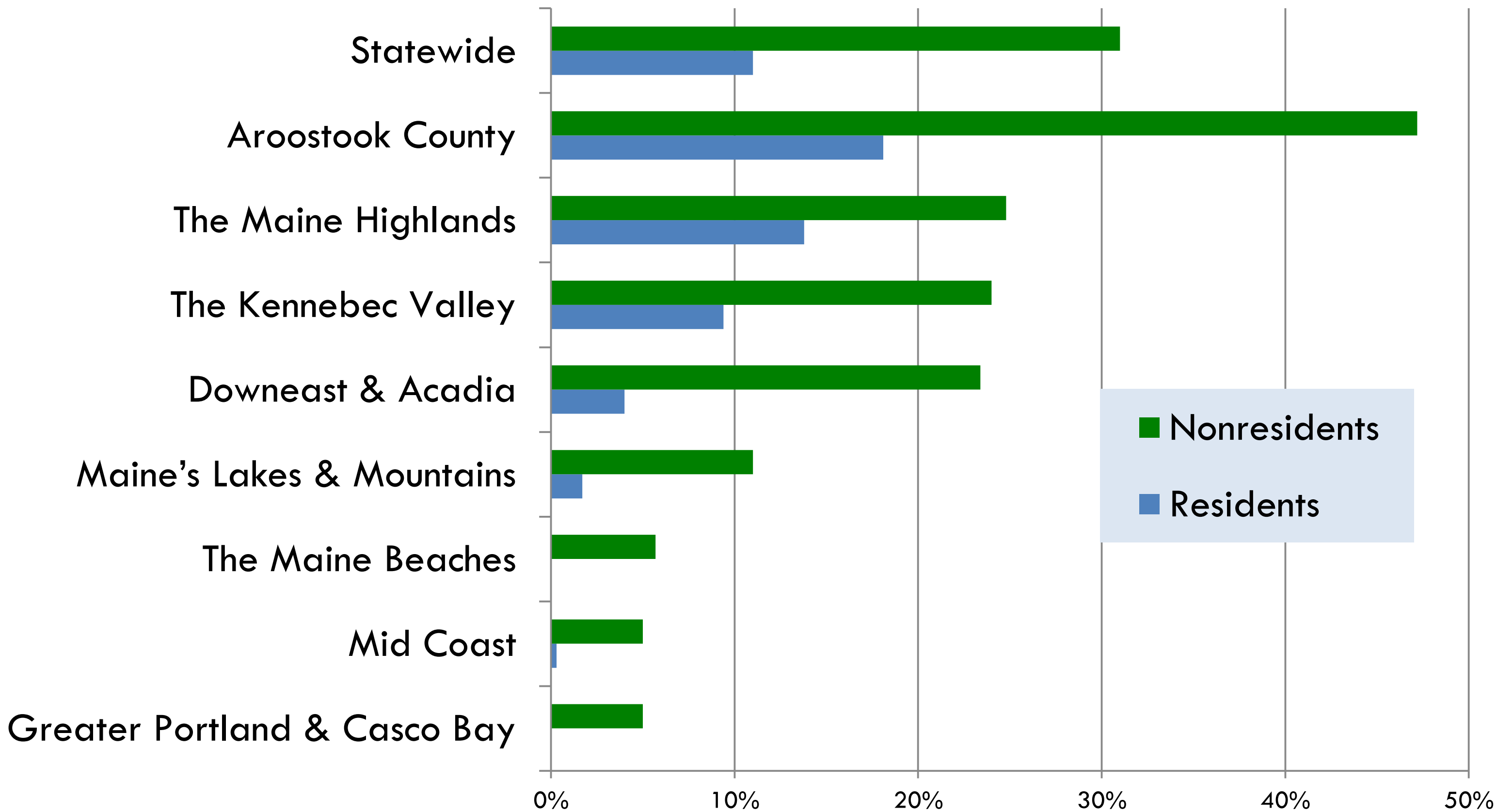
Anglers staying at sporting camps



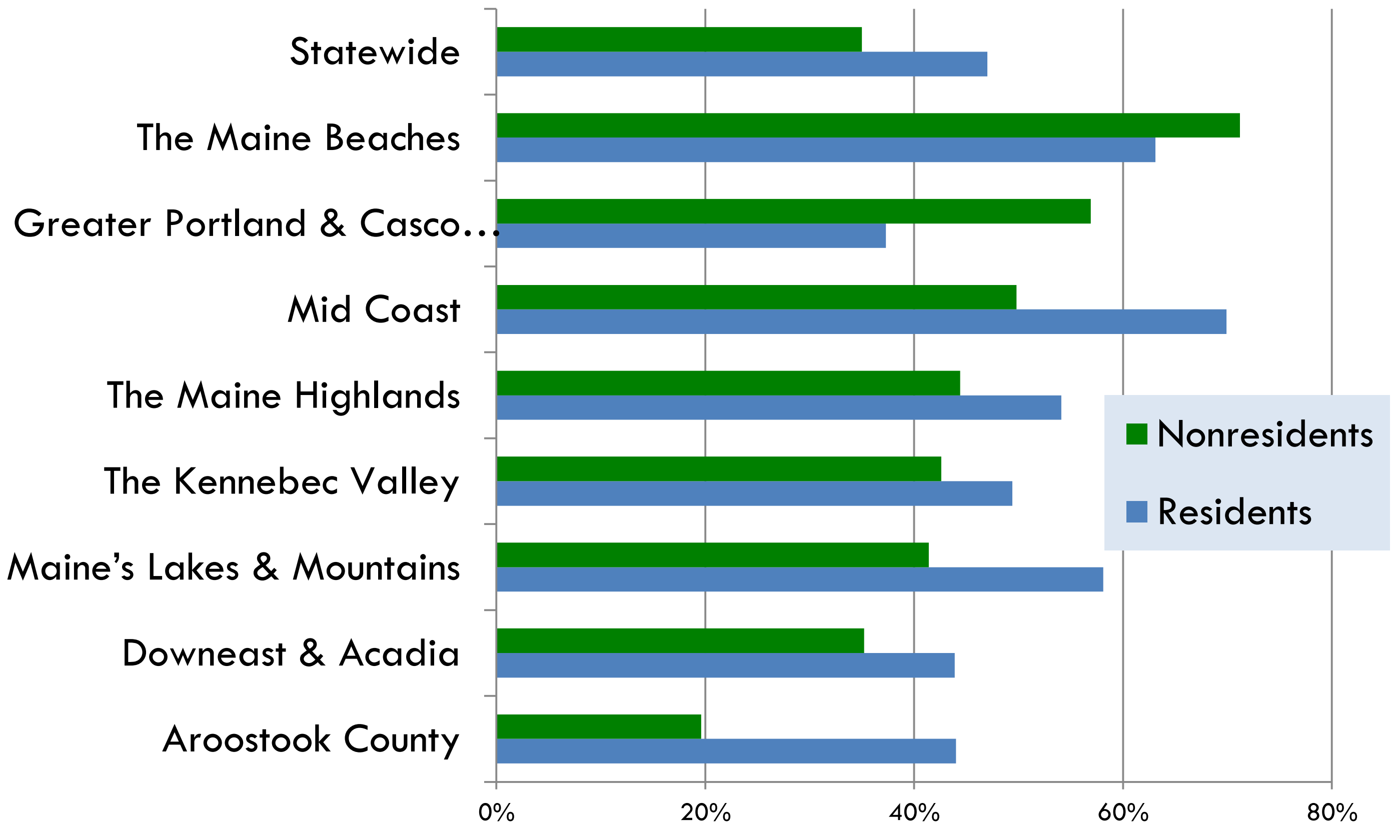
Anglers staying with friends & relatives



Hunters staying at sporting camps



Hunters staying with friends & relatives



How anglers book accommodations

	Residents	Nonresidents	Travelers
Through a travel agency	0%	0%	9%
Direct with a lodge/guide	22%	32%	19%
Online	31%	38%	39%
Over the phone	40%	20%	11%
Via email	6%	7%	4%
At fishing/outdoor show or expo	0%	1%	1%
Other	18%	11%	26%

How hunters book accommodations

	Residents	Nonresidents	Travelers
Through a travel agency	1%	0%	9%
Direct with a lodge/guide	32%	54%	15%
Online	14%	15%	37%
Over the phone	39%	26%	11%
Via email	7%	5%	1%
Other	21%	11%	30%

Advance trip planning for anglers

	Residents	Nonresidents	Travelers
Less than a week	38%	5%	6%
2 to 4 weeks	31%	13%	31%
1 to 6 months	22%	41%	32%
6 to 12 months	9%	36%	26%
More than a year	1%	5%	6%
Total	100%	100%	100%

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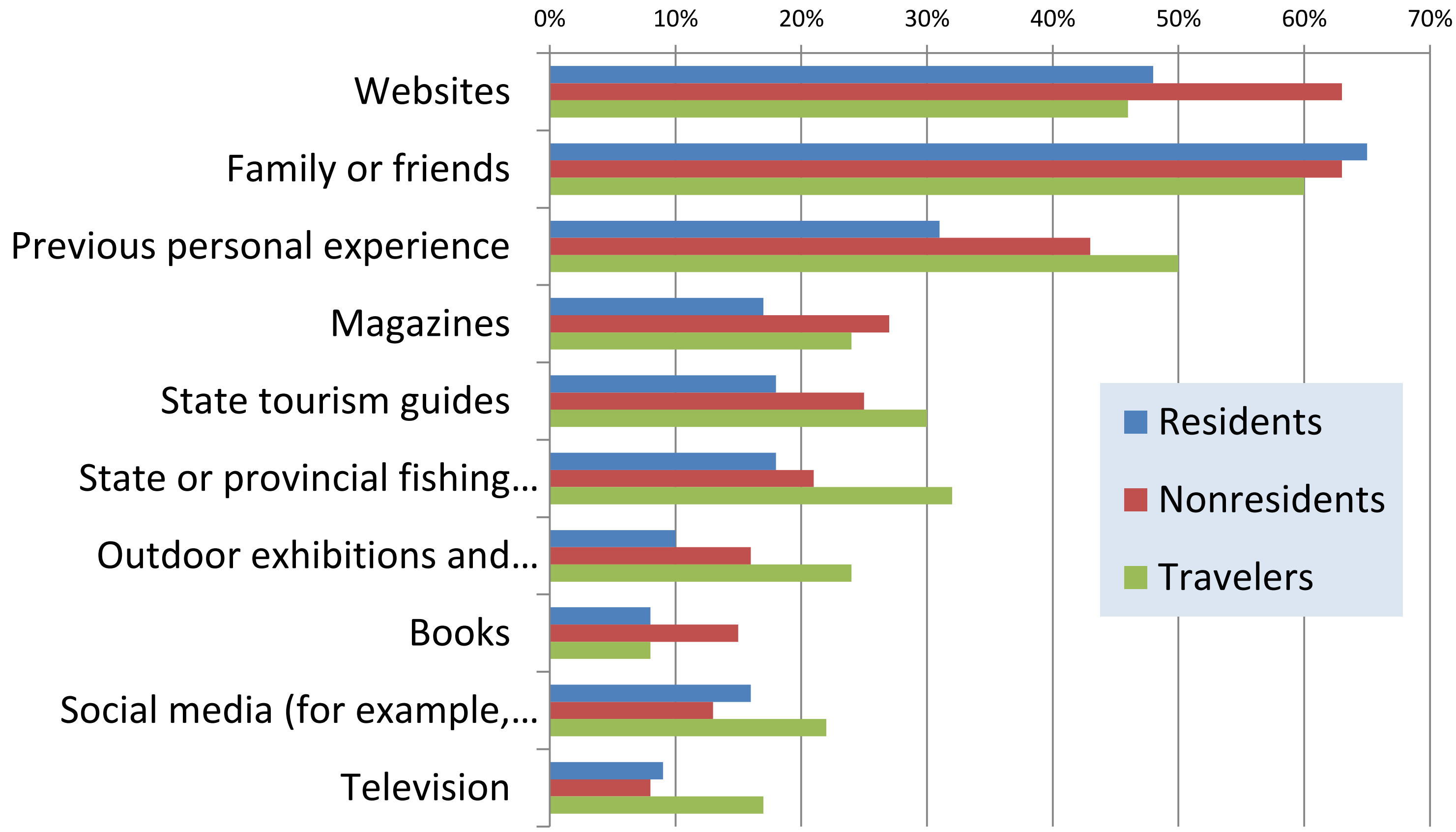
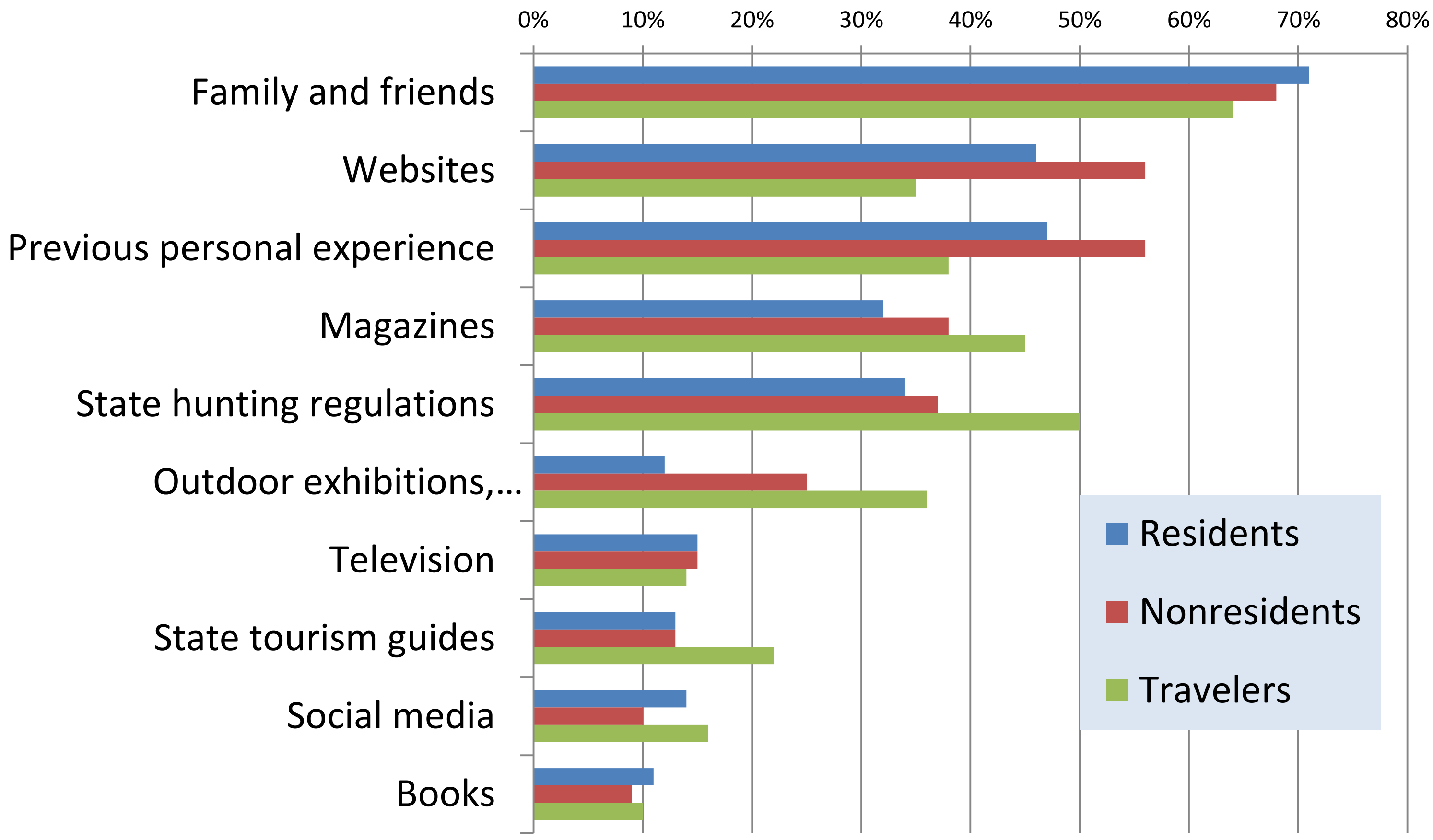
Advance trip planning for hunters

	Residents	Nonresidents	Travelers
Less than a week	50%	6%	15%
2 to 4 weeks	30%	17%	25%
1 to 6 months	16%	52%	42%
6 to 12 months	4%	23%	14%
More than a year	0%	2%	2%
Total	100%	100%	100%

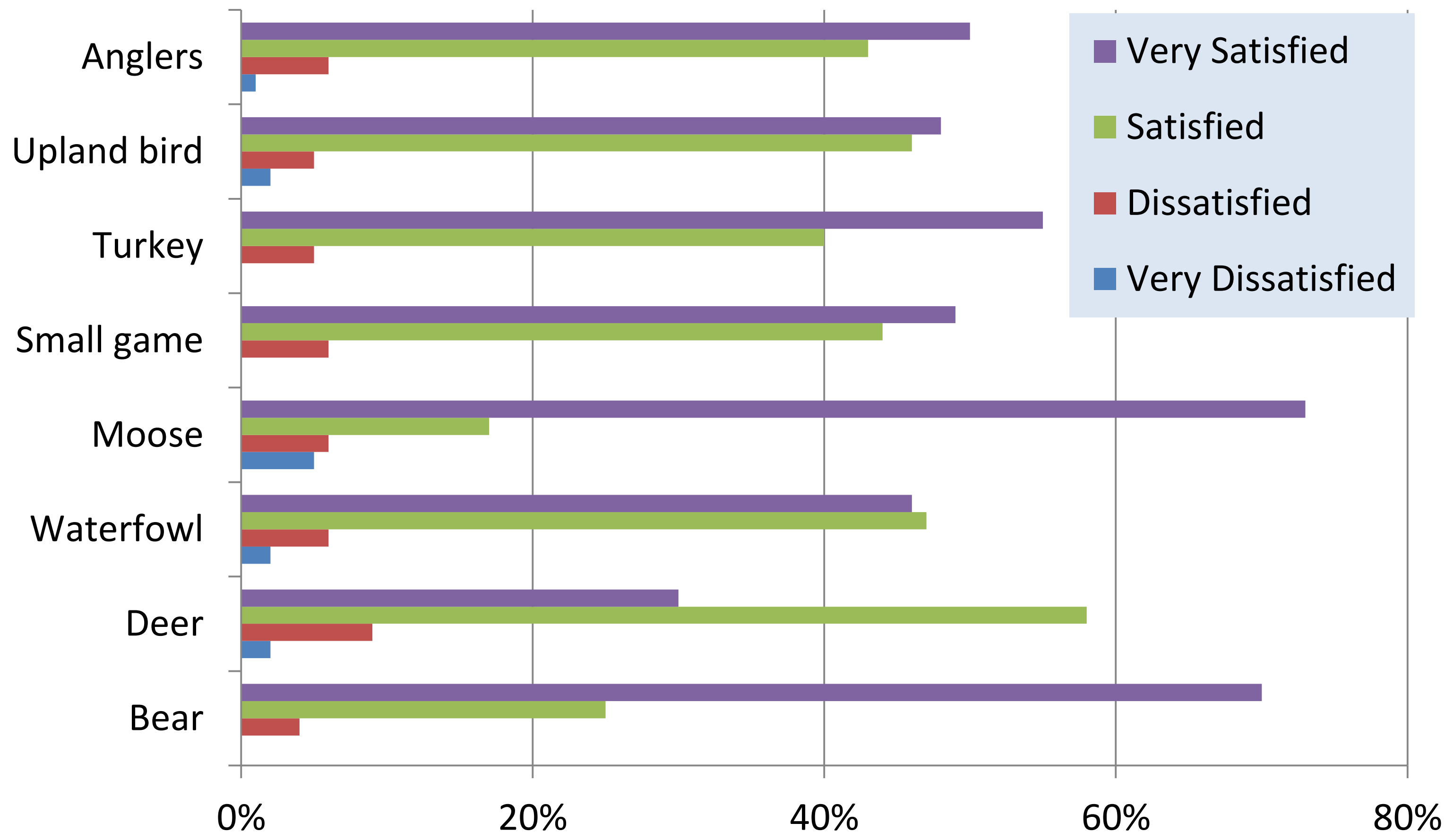
Information sources for angler trip planning



Information sources for hunter trip planning



Nonresident satisfaction



Market Insights

- Market penetration
- Perceptions
- Opportunities
- Challenges

Penetration in Maine's market for anglers

State of residence	Traveling Anglers	Penetration Rate
New Hampshire	57,615	16%
Vermont	19,415	10%
Rhode Island	27,945	7%
Massachusetts	174,739	3%
Connecticut	172,936	4%
Florida	149,314	2%
New Jersey	243,043	2%
Pennsylvania	311,119	1%
New York	390,923	1%
Virginia	170,325	1%
Total	1,717,375	2%

Penetration in Maine's market for hunters

State of residence	Traveling Hunters	Penetration Rate
Massachusetts	31,322	25%
New Hampshire	17,473	20%
Vermont	12,430	16%
Rhode Island	6,023	15%
Pennsylvania	18,664	13%
New York	15,605	10%
Connecticut	53,106	4%
New Jersey	46,891	3%
Virginia	62,057	1%
Florida	146,316	1%
Total	409,886	6%

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Perceptions of Maine as a sporting destination

	Nonresident anglers
Best fishing / hunting	X
Best prices	X
Safest	X
Best transportation	
Most fun outside of fishing / hunting	X
Best dining / entertainment	
Best resorts, hotels, lodges	
Most attractive natural setting	X
Most favorable climate	X
Best reputation for guide services	X

Perceptions of Maine as a sporting destination

	Nonresident anglers	Nonresident hunters
Best fishing / hunting	X	X
Best prices	X	X
Safest	X	X
Best transportation		
Most fun outside of fishing / hunting	X	X
Best dining / entertainment		
Best resorts, hotels, lodges		X
Most attractive natural setting	X	X
Most favorable climate	X	X
Best reputation for guide services	X	X

Perceptions of Maine as a sporting destination

	Nonresident anglers	Nonresident hunters	Traveling anglers
Best fishing / hunting	X	X	
Best prices	X	X	
Safest	X	X	X
Best transportation			
Most fun outside of fishing / hunting	X	X	
Best dining / entertainment			
Best resorts, hotels, lodges		X	
Most attractive natural setting	X	X	X
Most favorable climate	X	X	
Best reputation for guide services	X	X	

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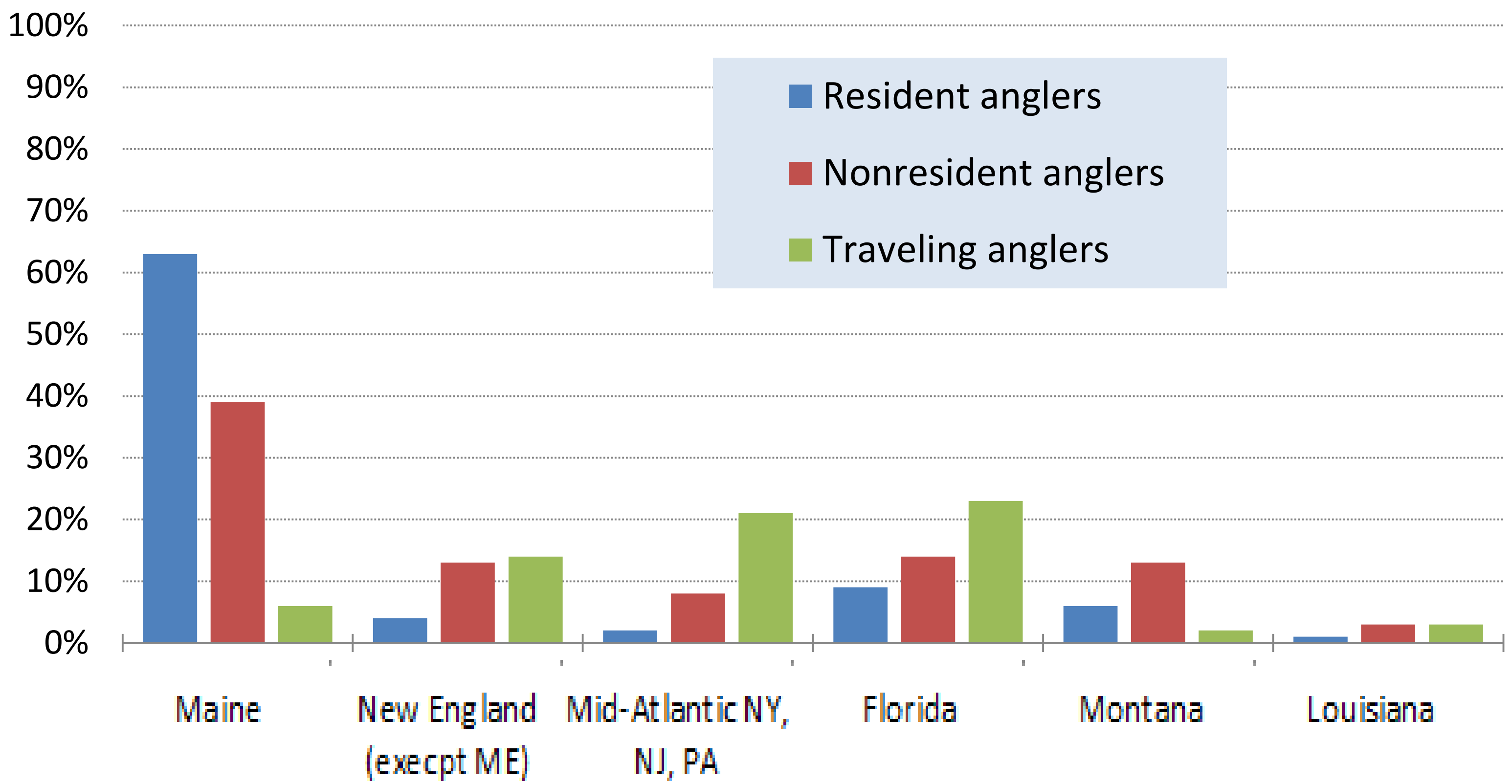
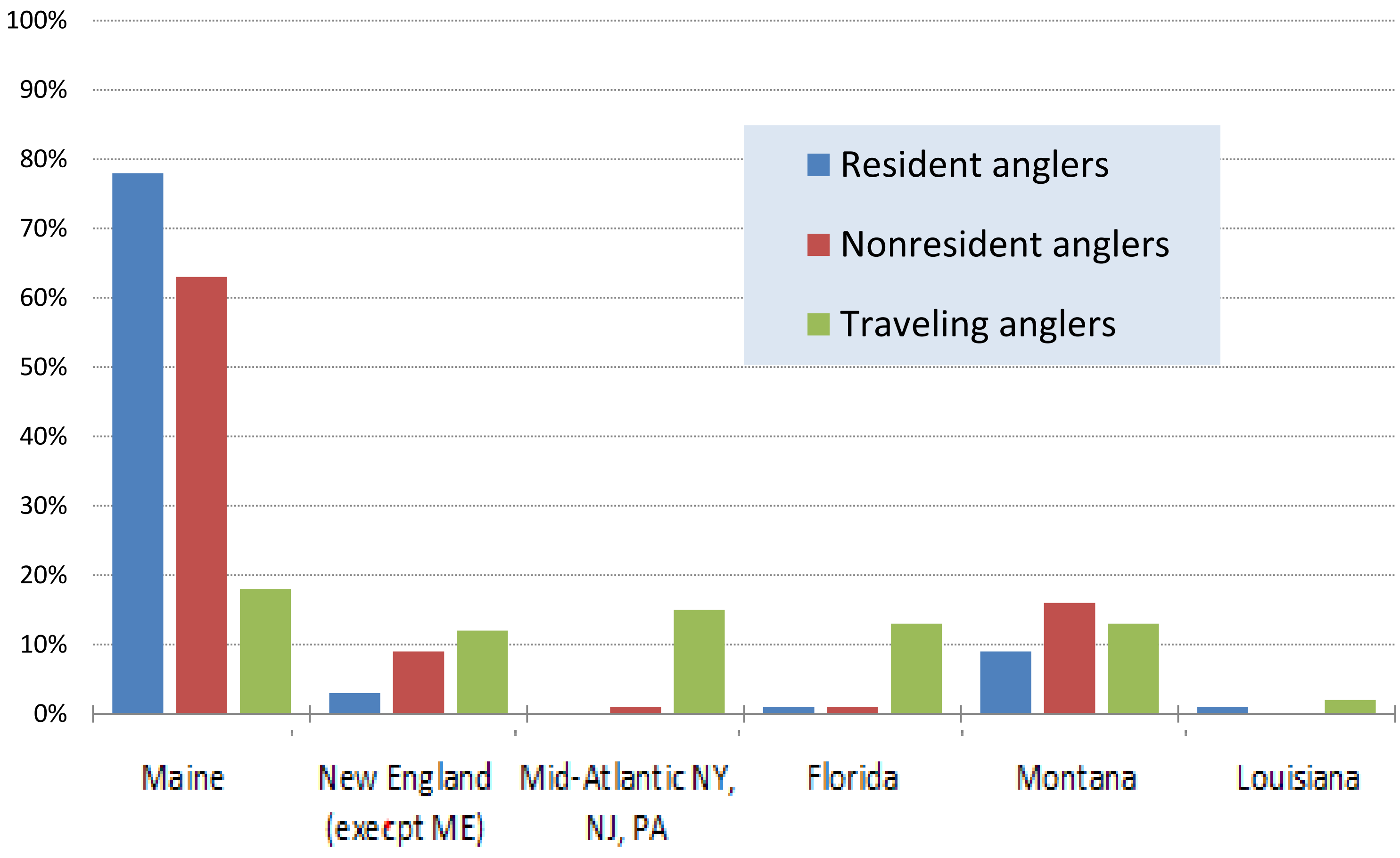
Perceptions of Maine as a sporting destination

	Nonresident anglers	Nonresident hunters	Traveling anglers	Traveling hunters
Best fishing / hunting	X	X		
Best prices	X	X		
Safest	X	X	X	
Best transportation				
Most fun outside of fishing / hunting	X	X		
Best dining / entertainment				
Best resorts, hotels, lodges		X		
Most attractive natural setting	X	X	X	
Most favorable climate	X	X		
Best reputation for guide services	X	X		

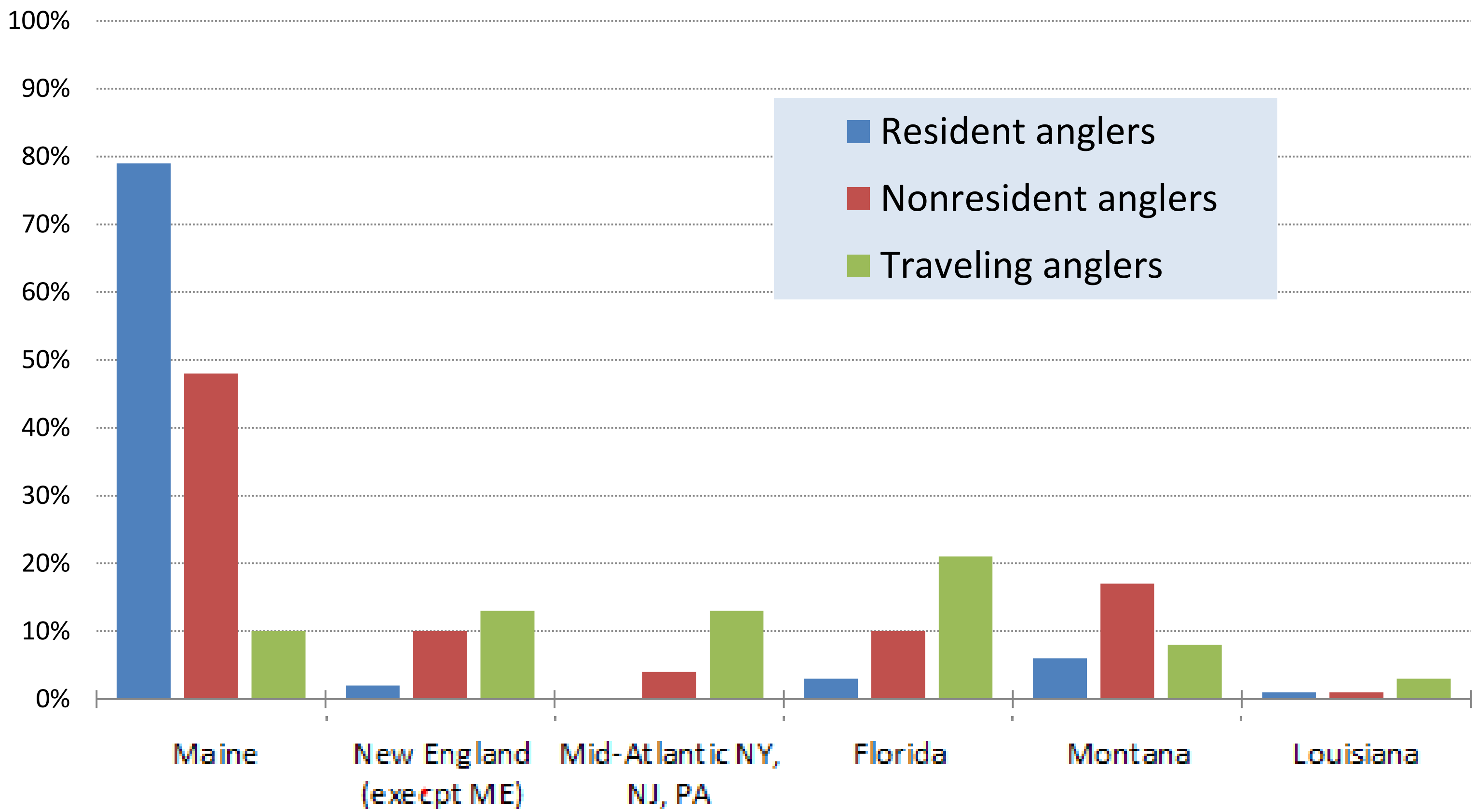
Perceptions of "best fishing"



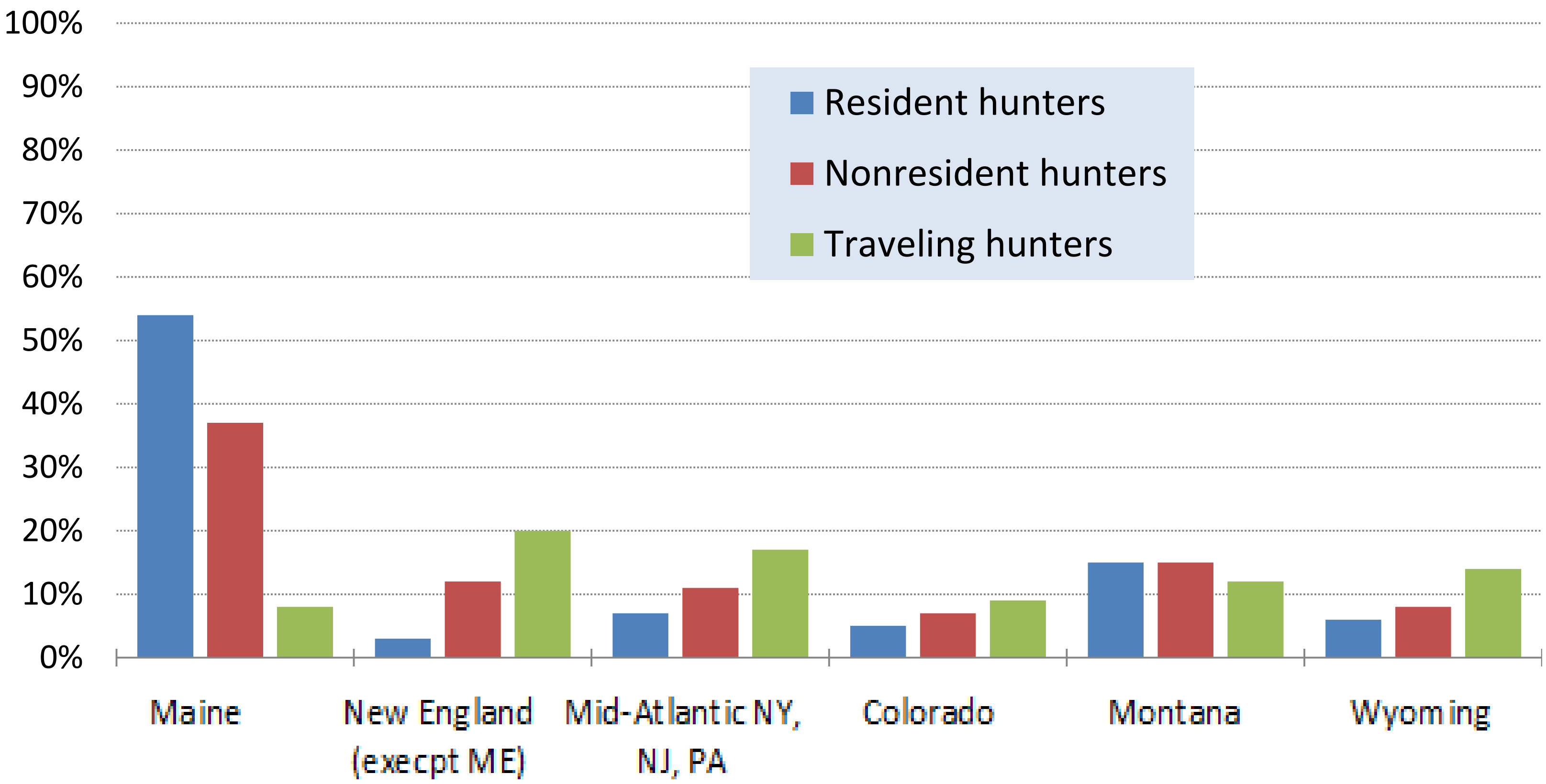
Perceptions of "most attractive natural setting"



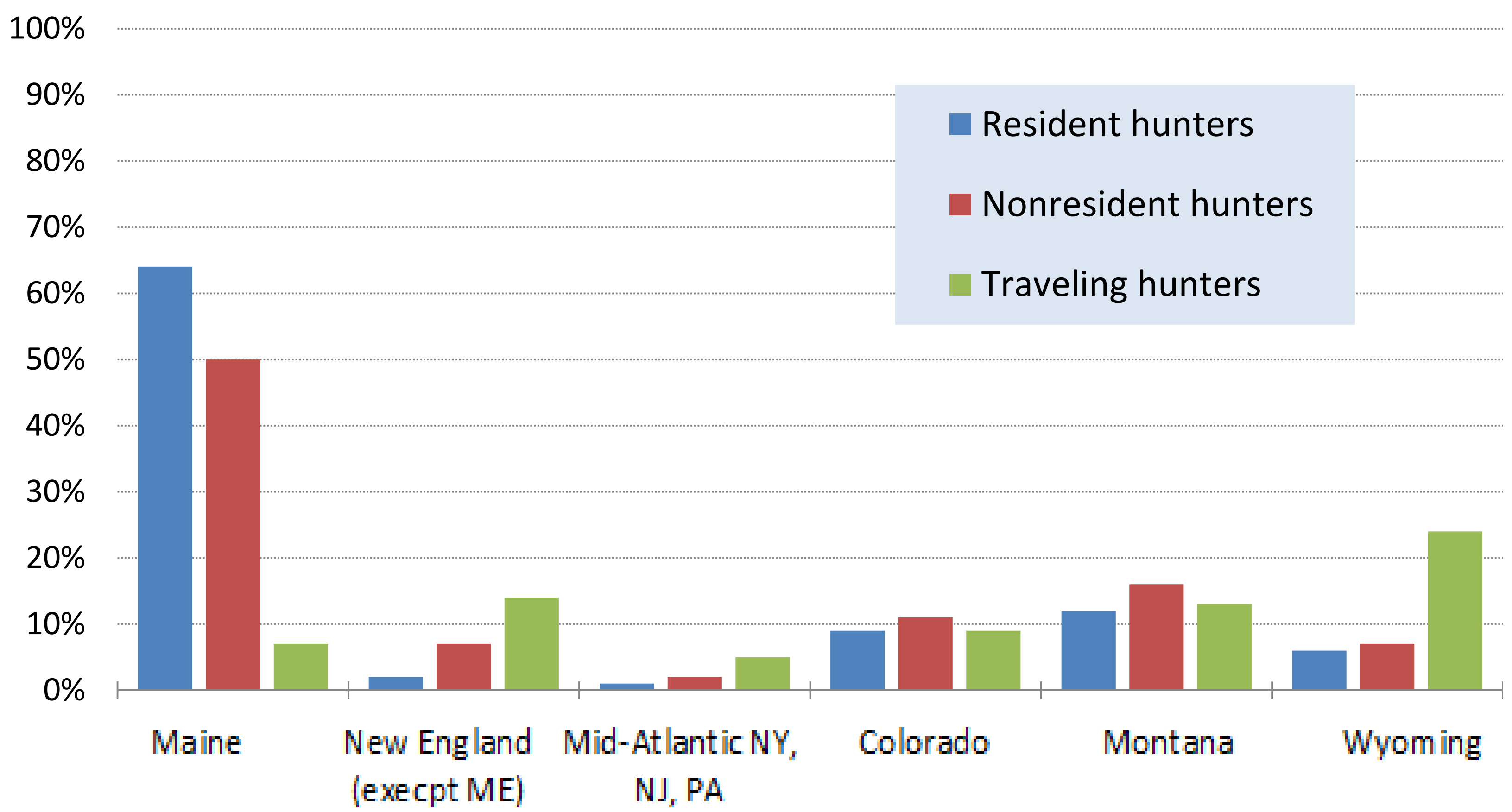
Perceptions of "best guide services"



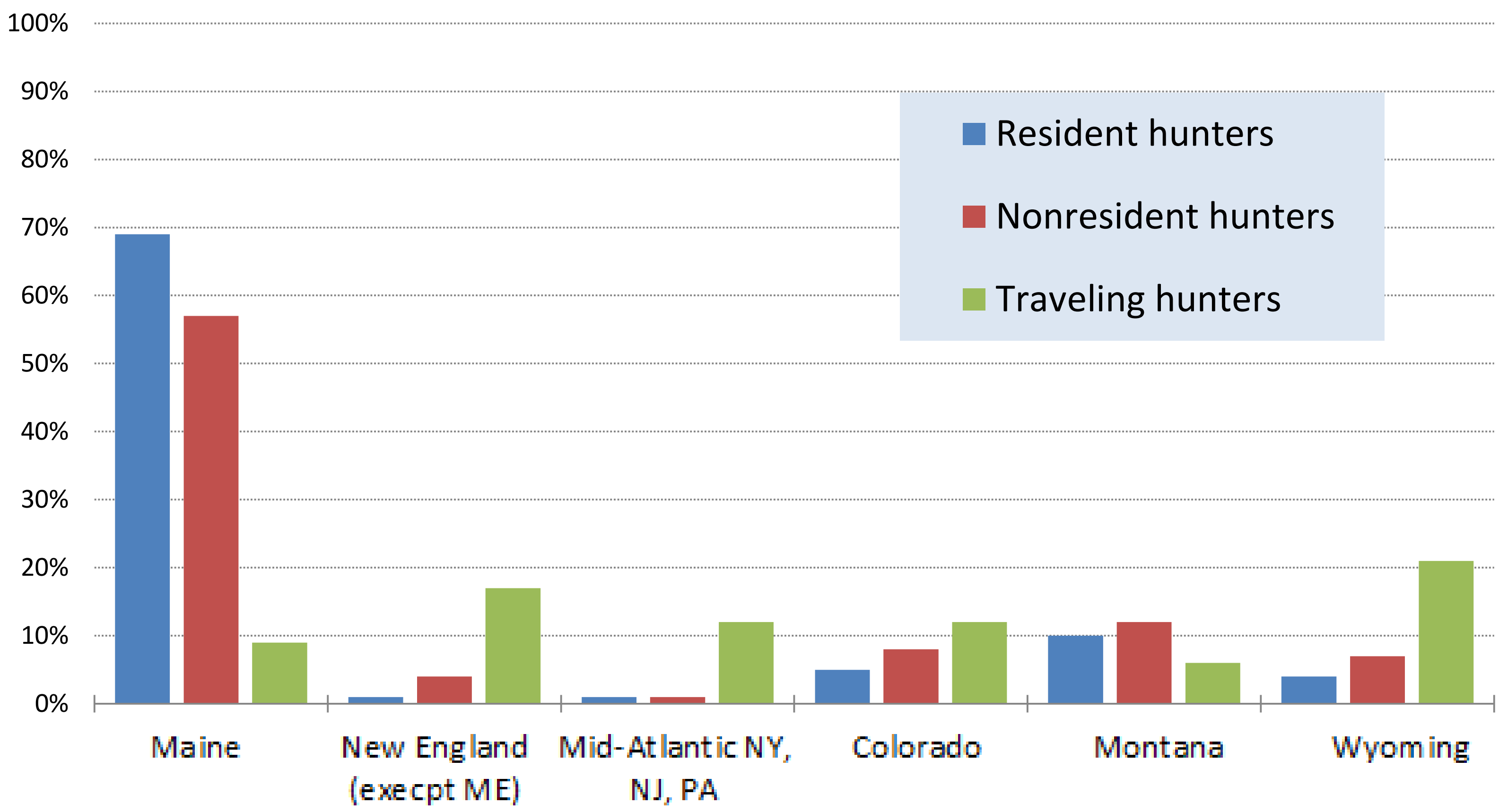
Perceptions of “best hunting”



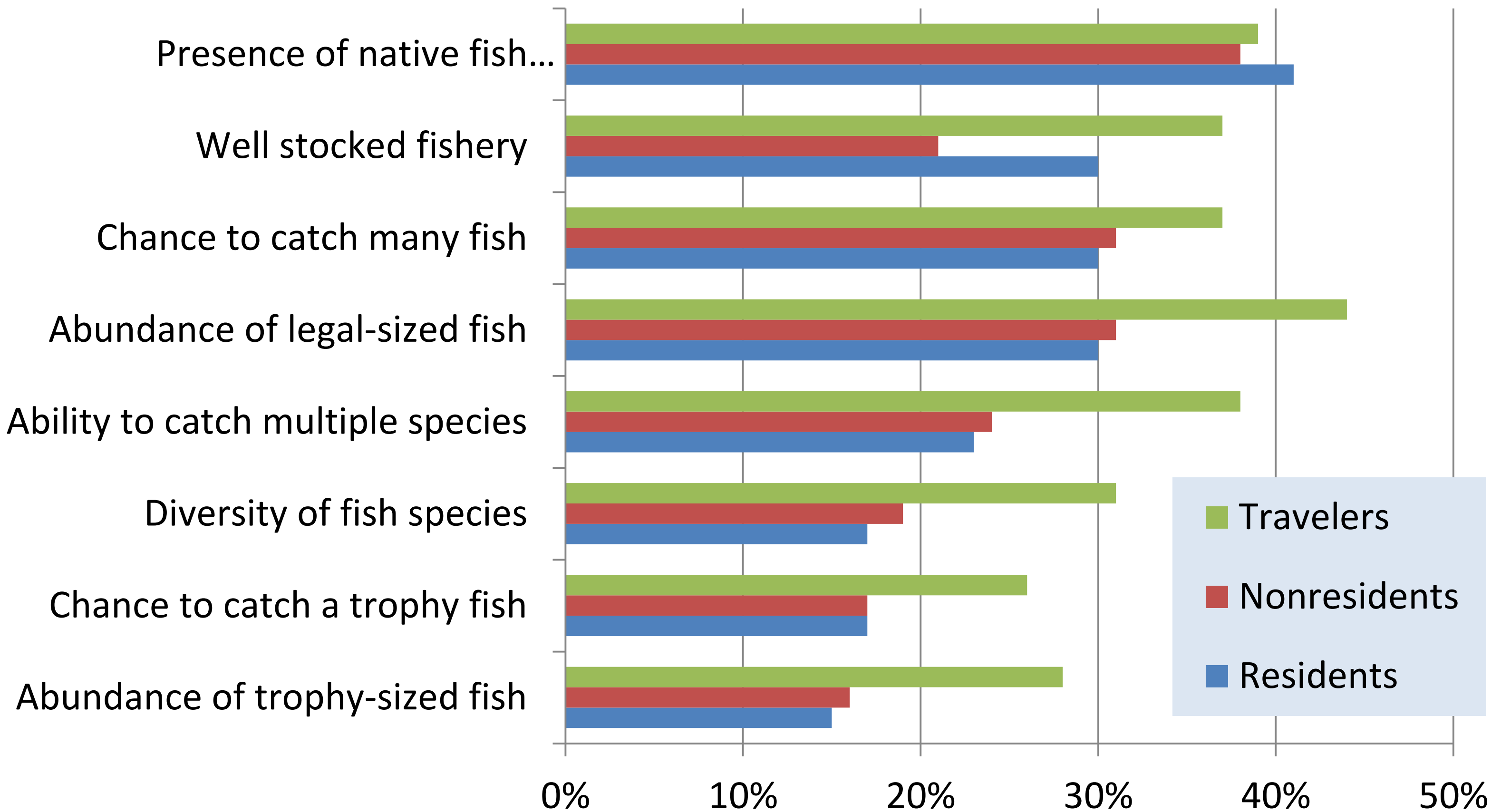
Perceptions of “most attractive natural setting”



Perceptions of “best guide services”



"Very important" factors in selecting a fishing destination



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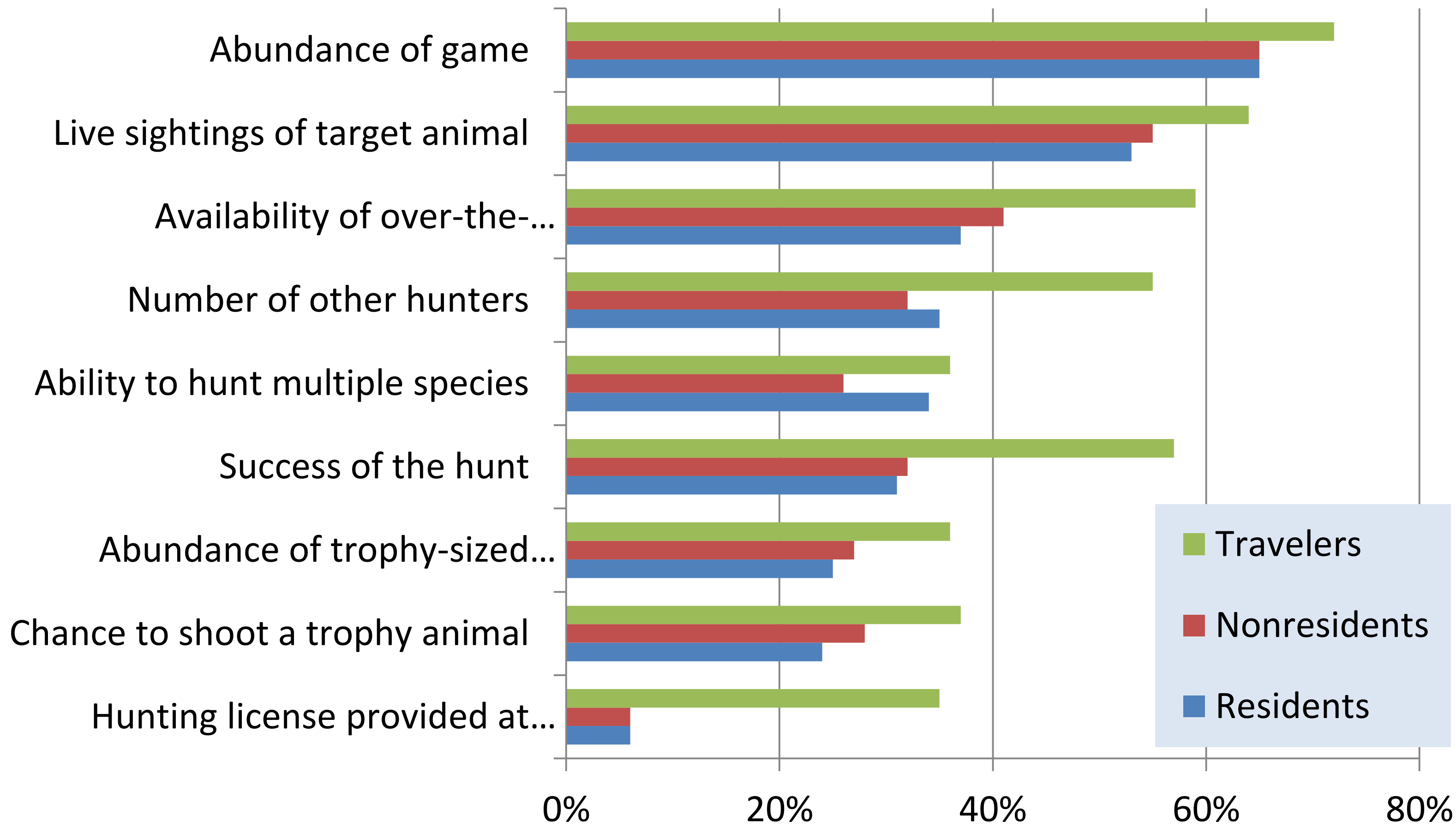
"Very important" factors in selecting a hunting destination

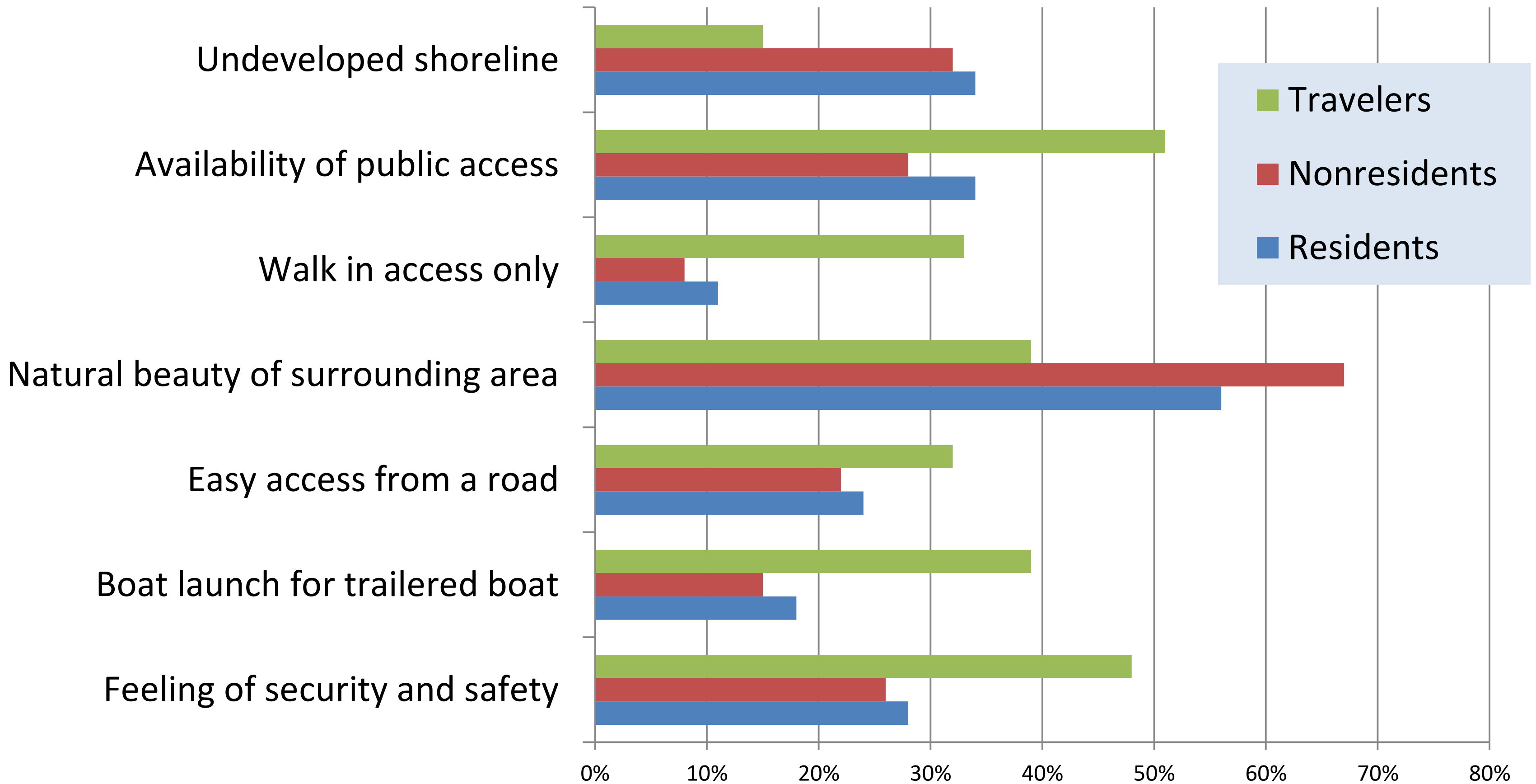


“Very important” factors in selecting a fishing or hunting destination

ANGLERS	Residents	Nonresidents	Travelers
Availability of overnight accommodations	11%	29%	48%
Close to motels, restaurants, etc.	3%	11%	36%
Nearby fishing gear/repair services	4%	10%	22%
Activities for non-anglers	12%	13%	21%

HUNTERS	Residents	Nonresidents	Travelers
Availability of overnight accommodations	14%	33%	56%
Close to motels, restaurants, etc.	5%	8%	37%
Nearby hunting gear/repair services	10%	10%	28%
Activities for non-hunters	7%	7%	28%

"Very important" factors in selecting a fishing destination



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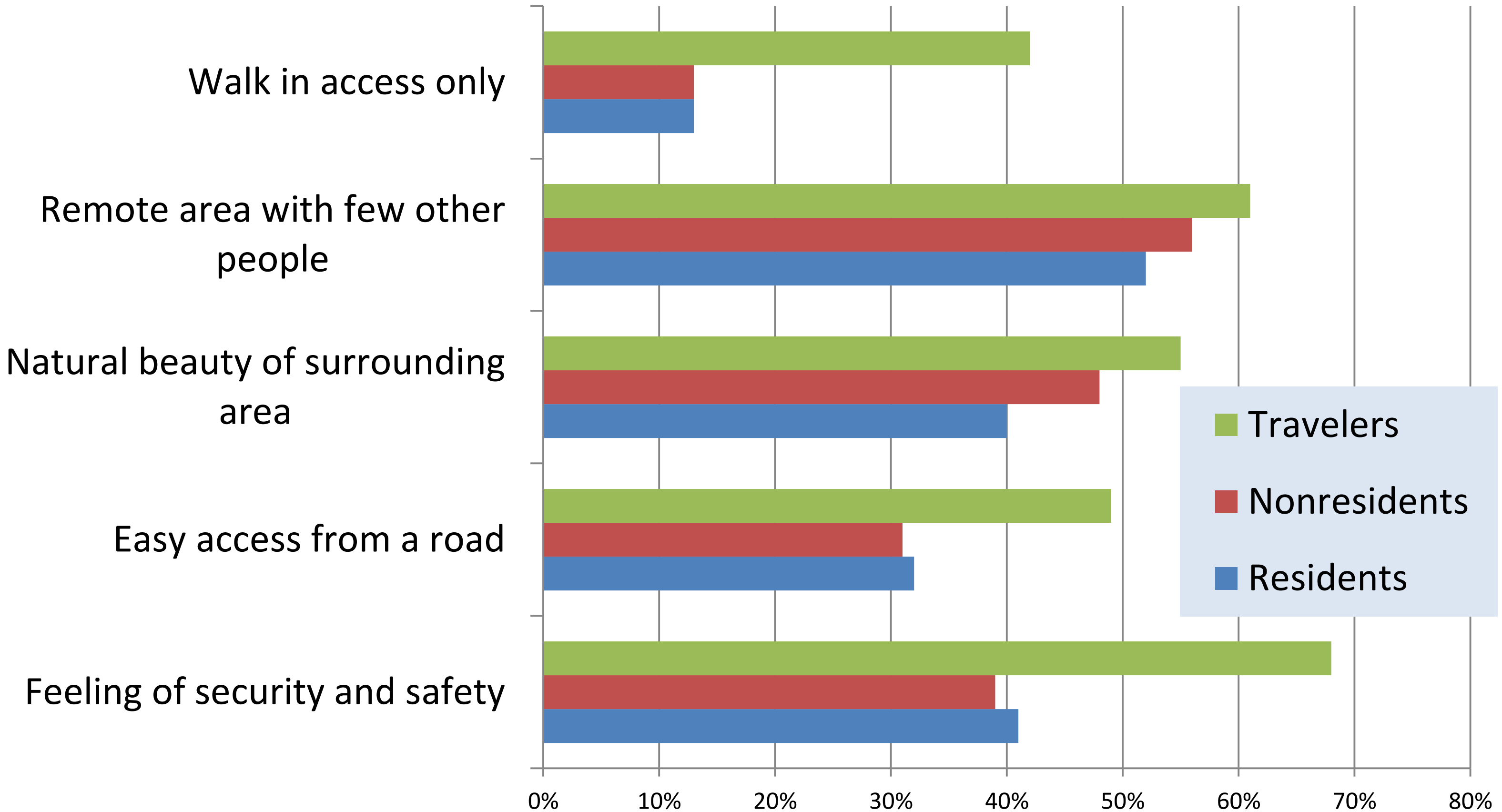
"Very important" factors in selecting a hunting destination



Thank you!

Information provided by:

- Hunting in Maine in 2013: A statewide and regional analysis of participation and economic contributions. Prepared for the Maine Office of Tourism and Maine Department of Inland Fisheries and Wildlife by Southwick Associates. September 30, 2014.
- Fishing in Maine in 2013: A statewide and regional analysis of participation and economic contributions. Prepared for the Maine Office of Tourism and Maine Department of Inland Fisheries and Wildlife by Southwick Associates. December 30, 2014.
- Recreational Hunter and Angler Market Report: Maine. Prepared for the Maine Office of Tourism and Maine Department of Inland Fisheries and Wildlife by Southwick Associates. December 30, 2014.
- National Survey of Fishing, Hunting, and Wildlife-Associated Recreation (2011 and 2006, 2001), USFWS.

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