



**AMERICAN FLY FISHING TRADE ASSOCIATION**

**Survey of U.S. Fly Fishing Retailers  
for the  
American Fly Fishing Trade Association**

Prepared by:

**Southwick Associates, Inc.**

PO Box 6435

Fernandina Beach, FL 32035

*Rob@SouthwickAssociates.com*



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## **Introduction**

This report presents the results of the 2017 AFFTA Fly Fishing Retailer Survey conducted in 2018. This survey was developed to help explain trends within the fly fishing industry and retail characteristics. The information for this report was collected through an online survey of retailers conducted by Southwick Associates. The results are intended to help individual members of the fly fishing industry, and the industry collectively, to better understand their operating environment and improve profitability and performance.

## **Methodology**

The survey questions were developed and tested collaboratively by Southwick Associates, AFFTA staff and the AFFTA executive committee as part of the previous survey efforts. AFFTA dealer lists were used as the population of fly fishing retailers.

For the email survey, 1,138 retailers were initially contacted. The first round of invitations was sent on February 20<sup>th</sup>, 2017 with reminder emails sent on February 26<sup>th</sup>, March 5<sup>th</sup>, March 12<sup>th</sup> and March 20<sup>th</sup>. The online survey yielded 130 completed surveys and 5 partially completed but usable surveys for a total of 135 usable surveys. The online survey was open from February 20<sup>th</sup>, 2018 to March 30<sup>th</sup>, 2018.

The results were analyzed using a combination of SPSS and EXCEL.

## **RESULTS:**

## Size of the Trade

Several sources were used to estimate the size of the fly fishing market. An estimate of fishing expenditures by fly anglers was calculated from the 2016 National Survey of Fishing, Hunting and Wildlife-Associated Recreation data. The proportion of this spending that was specifically for fly fishing was then estimated based on the percentage of days that anglers spent fly fishing in 2016, out of their total fishing days for the year. This spending estimate was then adjusted for fly fishing versus non-fly fishing expenditures and other factors using information from Southwick Associates' AnglerSurvey market monitoring service, which collects data on several categories of fly fishing purchases. Finally, this 2016 fly fishing market size was adjusted for 2017 using the 2016 to 2017 sales trend reported by dealers in the 2017 AFFTA retailer survey (-0.6%), combined with the two percent general inflation rate reported by the U.S. Bureau of Labor Statistics. We estimate the 2017 fly fishing market to be:

**\$1.077 billion**

This figure includes sales at independent dealers as well as online, big box and other retail channels, and represents retail sales, not wholesale. The total market size estimate is representative of several product categories, including travel expenses, fly fishing equipment, auxiliary equipment, special equipment, and other expenditures. A breakout of each of these categories is included below, and footnotes at the bottom of this page provide a description of the items that are included in each category.

Product Category	Estimated Sales (in Millions)	Percent of Total Fly Fishing Sales
Travel <sup>1</sup>	\$409	38.0%
Fishing Tackle <sup>2</sup>	\$158	14.6%
Auxiliary Equipment <sup>3</sup>	\$241	22.4%
Special Equipment <sup>4</sup>	\$206	19.2%
Other Miscellaneous Items <sup>5</sup>	\$63	5.9%
Total	\$1,077	100.0%

<sup>1</sup> Includes food, lodging, transportation, guide fees, land use fees, equipment rentals, boating costs, ice and cooking or heating fuel.

<sup>2</sup> Includes fly rods, fly reels and components, fly lines, leaders, flies, weights, tackle boxes, creels, landing nets, and other fly tackle.

<sup>3</sup> Includes special fishing clothing, waders, boots, foul weather gear, camping equipment, binoculars, and other auxiliary equipment.

<sup>4</sup> Includes boats, campers, cabins, trail bikes, 4-wheelers, ATVs, trucks, trailers, motor homes, RVs and other special equipment.

<sup>5</sup> Includes magazines, books, DVDs, membership dues, land leasing and ownership, and fishing licenses, stamps, tags or permits.

## Number of Fly Anglers

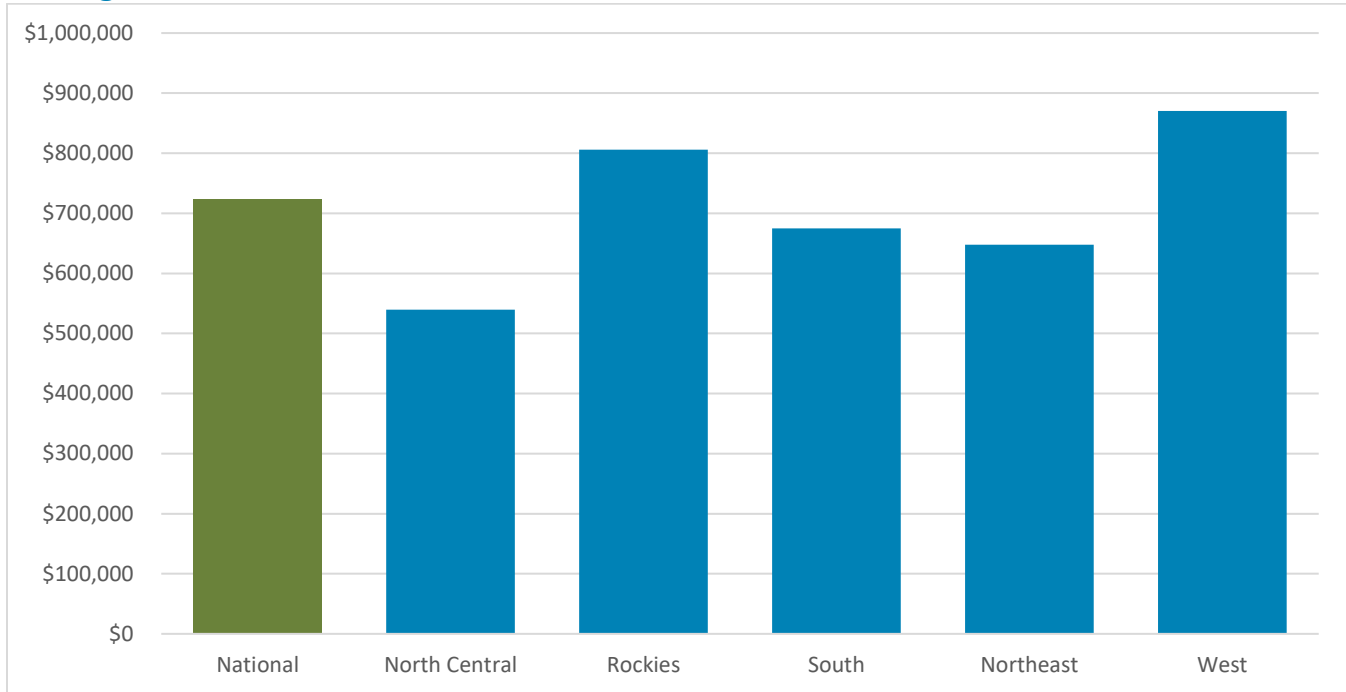
The most dependable estimate of fly anglers is provided by the U.S. Fish and Wildlife Service (USFWS), and were produced by the U.S. Census Bureau via the 2016 National Survey of Fishing, Hunting and Wildlife-Associated Recreation. In 2016, it was estimated that 5.91 million Americans over the age of 16 fly fished at least once that year. Considering the number of individuals who purchased fishing licenses in the U.S. decreased by just under 1% from 2016 to 2017 per license sales data provided by state fisheries agencies, the number of people who fly fished at least once in 2017 is:

**5.85 million**

It is important to note this figure estimates only the number of people who actually fly fished at least once in 2017. It does not estimate the number of people who purchased fly fishing equipment, nor the number of people who consider themselves fly anglers. Previous research shows that not all anglers actually fish every year. Over a five-year period, the pool of people who fished at least once during that period is likely two times larger than the number of people who actually fish in any single year.

# Annual Sales by Region

## Average Sales Per Retailer



Number of Respondents = 127

## Average Sales Per Retailer

	North Central	Rockies	South	Northeast	West	National
Average Gross Sales	\$539,445	\$805,692	\$674,892	\$647,834	\$870,544	\$723,516

States within each region:

North Central	Rockies	South	Northeast	West
Illinois	Arizona	Alabama	Connecticut	Alaska
Indiana	Colorado	Arkansas	Maine	California
Iowa	Idaho	Delaware	Massachusetts	Hawaii
Kansas	Montana	Florida	New Hampshire	Nevada
Michigan	New Mexico	Georgia	New Jersey	Oregon
Minnesota	Utah	Kentucky	New York	Washington
Missouri	Wyoming	Louisiana	Pennsylvania	
Nebraska		Virginia	Rhode Island	
North Dakota		Maryland	Vermont	
South Dakota		Mississippi		
Ohio		North Carolina		
Wisconsin		Oklahoma		
		South Carolina		
		Tennessee		
		Texas		
		West Virginia		



## Online Sales

Survey Question: Do you sell any products or services online?

Online sales	Percent of Sales Online
Yes	62.4%
No	37.6%
<b>Total</b>	<b>100.0%</b>
Avg. percent of revenues from online sales	<b>27.9%</b>

Number of Respondents = 133

## Sales by Product Category

Survey Question: What percentage of your gross fly fishing revenues came from each of the following product categories in 2017?

Sales by Product Category in 2017	Percent of Total Sales*
Apparel (shirts, jackets, hats etc.)	7.9%
Combos	3.4%
Destination travel	2.3%
Educational classes	1.5%
Eyewear	3.0%
Flies	17.4%
Fly lines	6.3%
Fly rods	10.7%
Fly tying materials	8.1%
Watercraft and accessories	1.5%
Gifts, books & DVDs	1.0%
Leaders and tippets	5.2%
Other (tools, nets, etc.)	3.4%
Outfitting, local guide services	11.8%
Packs, bags & vests	2.9%
Reels	8.2%
Waders and boots	5.4%
<b>Total</b>	<b>100.0%</b>

*\*Includes both Canadian and US responses*

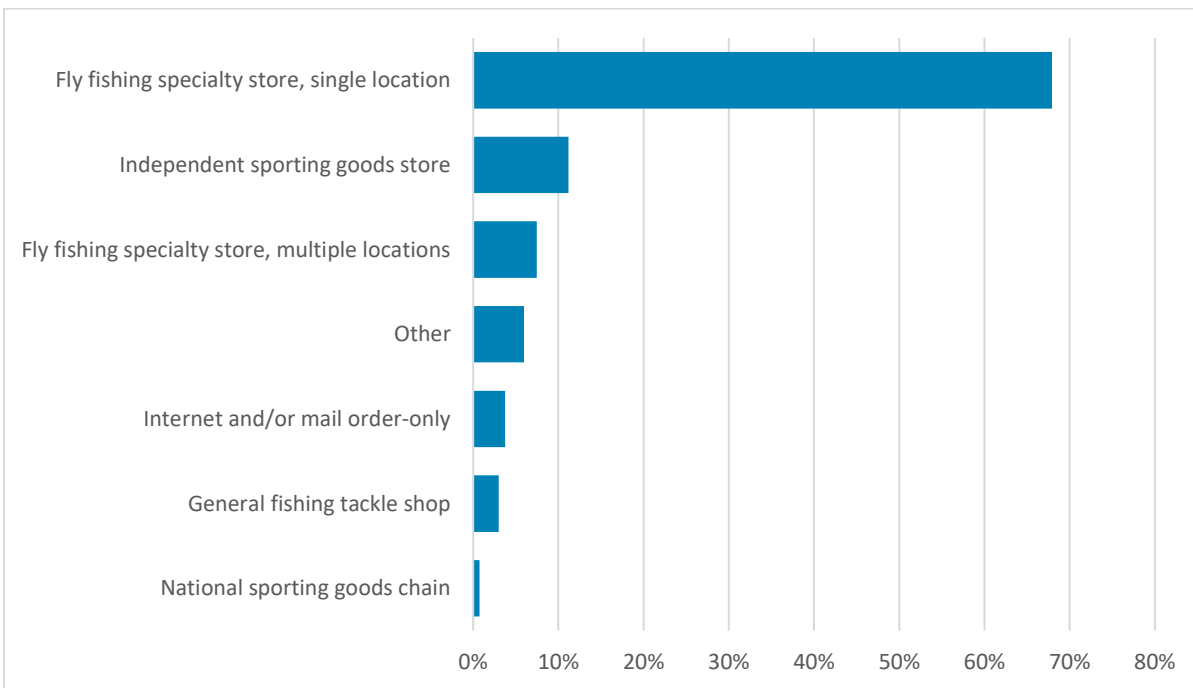
Number of Respondents = 117

# Types of Retailers

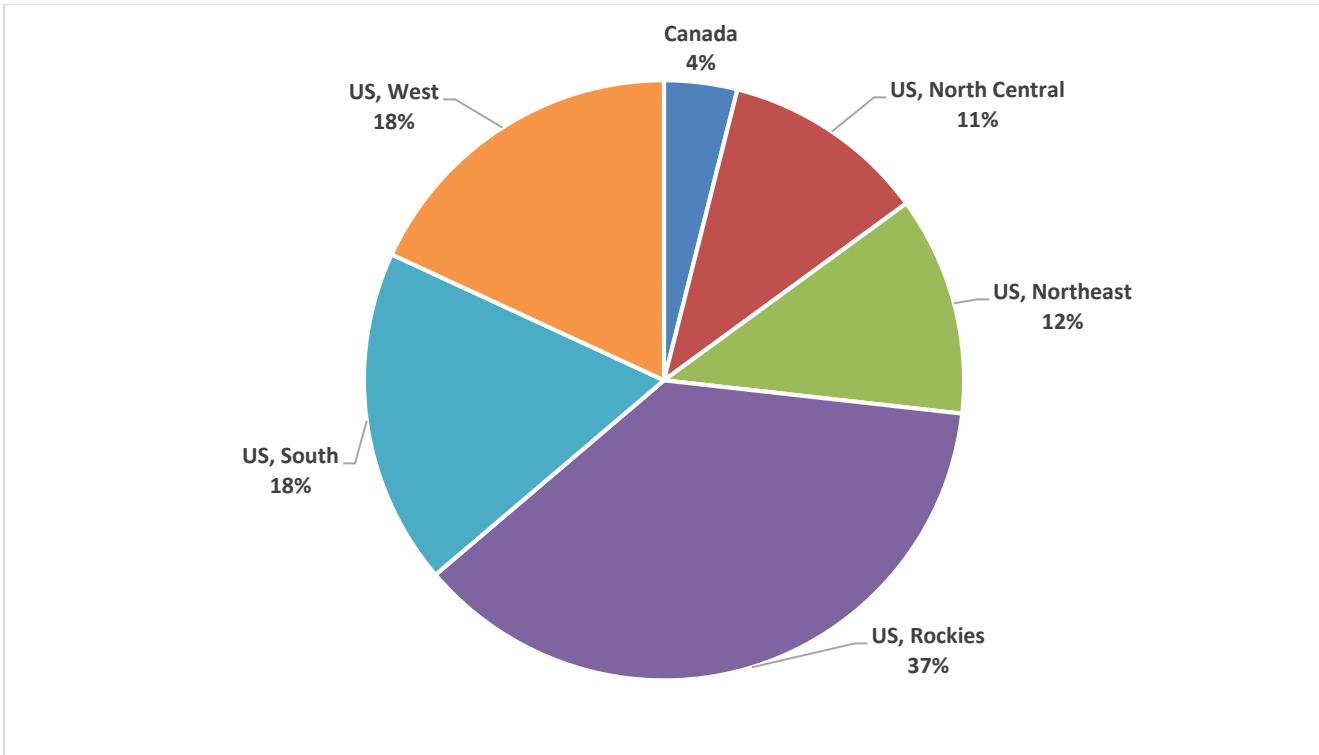
Survey Question: Please check the category that best describes your retail business.

Retailer Category	Total %
Fly fishing specialty store, single location	67.9%
Fly fishing specialty store, multiple locations	7.5%
Independent sporting goods store (carries more than just fishing equipment)	11.2%
Regional sporting goods chain (more than just fly fishing, two or more stores)	0.0%
National sporting goods chain	0.7%
Internet and/or mail order-only	3.7%
General fishing tackle shop that offers fly fishing products	3.0%
Other	6.0%
<b>Total</b>	<b>100.0%</b>

Number of Respondents = 134



## Geographic Distribution of Fly Fishing Retailers



Region	Total %	Count
US, North Central	11.0%	14
US, Rockies	37.0%	47
US, South	18.1%	23
US, Northeast	11.8%	15
US, West	18.1%	23
Canada	3.9%	5
<b>Total</b>	<b>100%</b>	<b>127</b>

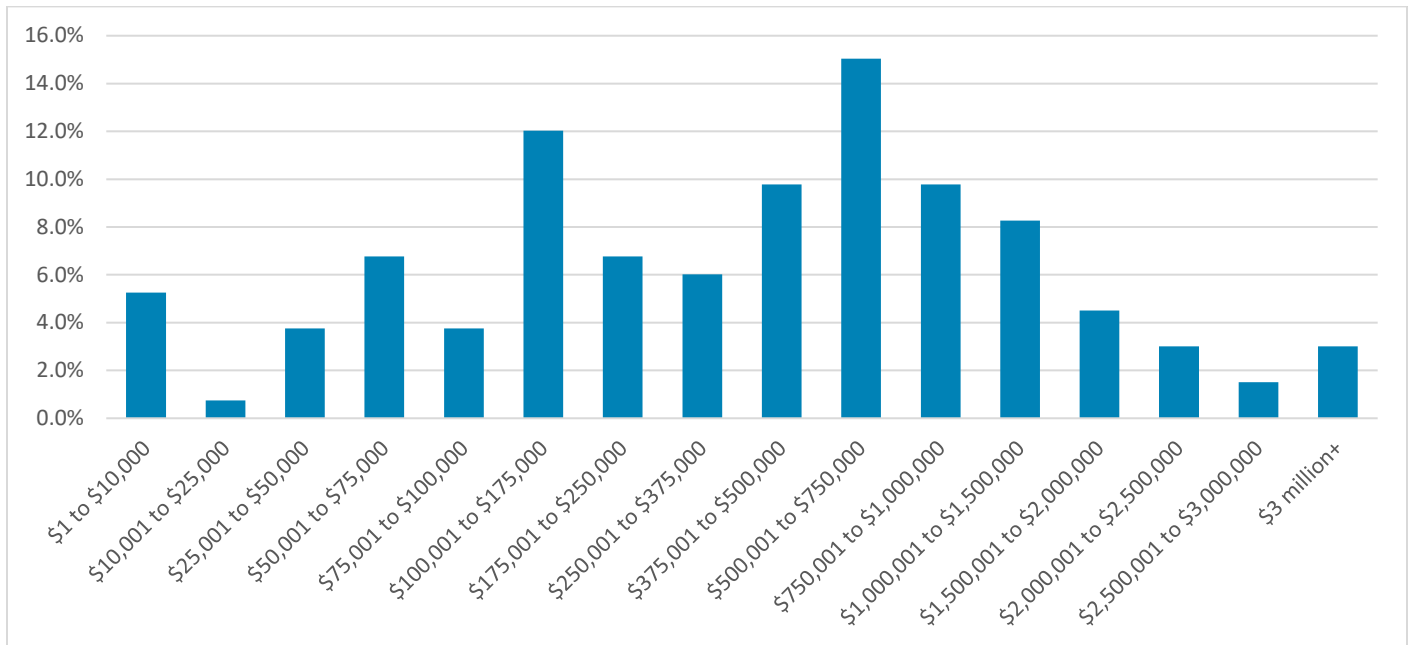
## Type of Retailer by Region

Survey Question: Please check the category that best describes your retail business

Retailer Category	North Central	Rockies	South	Northeast	West	Total
Fly fishing specialty store, single location	63.2%	68.1%	53.8%	60.0%	82.6%	67.9%
Fly fishing specialty store, multiple locations	0.0%	17.0%	3.8%	0.0%	0.0%	7.5%
Independent sporting goods store (carries more than fishing equipment)	21.1%	8.5%	23.1%	6.7%	0.0%	11.2%
Regional sporting goods chain (more than just fly fishing, two or more stores)	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%
National sporting goods chain	0.0%	0.0%	0.0%	0.0%	4.3%	0.7%
Internet and/or mail order-only	0.0%	2.1%	7.7%	20.0%	4.3%	3.7%
General fishing tackle shop that offers fly fishing products	0.0%	2.1%	7.7%	13.3%	0.0%	3.0%
Other	15.8%	2.1%	3.8%	0.0%	8.7%	6.0%
<b>Number of Respondents:</b>	N=19	N=47	N=23	N=15	N=17	N=134

## Gross Fly Fishing Merchandise Sales Per Fly Fishing Retailer

Survey Question: Please check the box that best describes your 2016 gross sales for fly fishing-related merchandise (tackle, gifts, accessories, etc.)?



Gross Fly Fishing Merchandise Sales	Total %	Count
\$1 to \$10,000	5.3%	7
\$10,001 to \$25,000	0.8%	1
\$25,001 to \$50,000	3.8%	5
\$50,001 to \$75,000	6.8%	9
\$75,001 to \$100,000	3.8%	5
\$100,001 to \$175,000	12.0%	16
\$175,001 to \$250,000	6.8%	9
\$250,001 to \$375,000	6.0%	8
\$375,001 to \$500,000	9.8%	13
\$500,001 to \$750,000	15.0%	20
\$750,001 to \$1,000,000	9.8%	13
\$1,000,001 to \$1,500,000	8.3%	11
\$1,500,001 to \$2,000,000	4.5%	6
\$2,000,001 to \$2,500,000	3.0%	4
\$2,500,001 to \$3,000,000	1.5%	2
\$3 million+	3.0%	4
<b>Number of Respondents (N):</b>	<b>100.0%</b>	<b>133</b>

## Gross Sales by Category and Region

Survey Question: *What percentage of your gross fly fishing revenues came from each of the following product categories in 2016?*

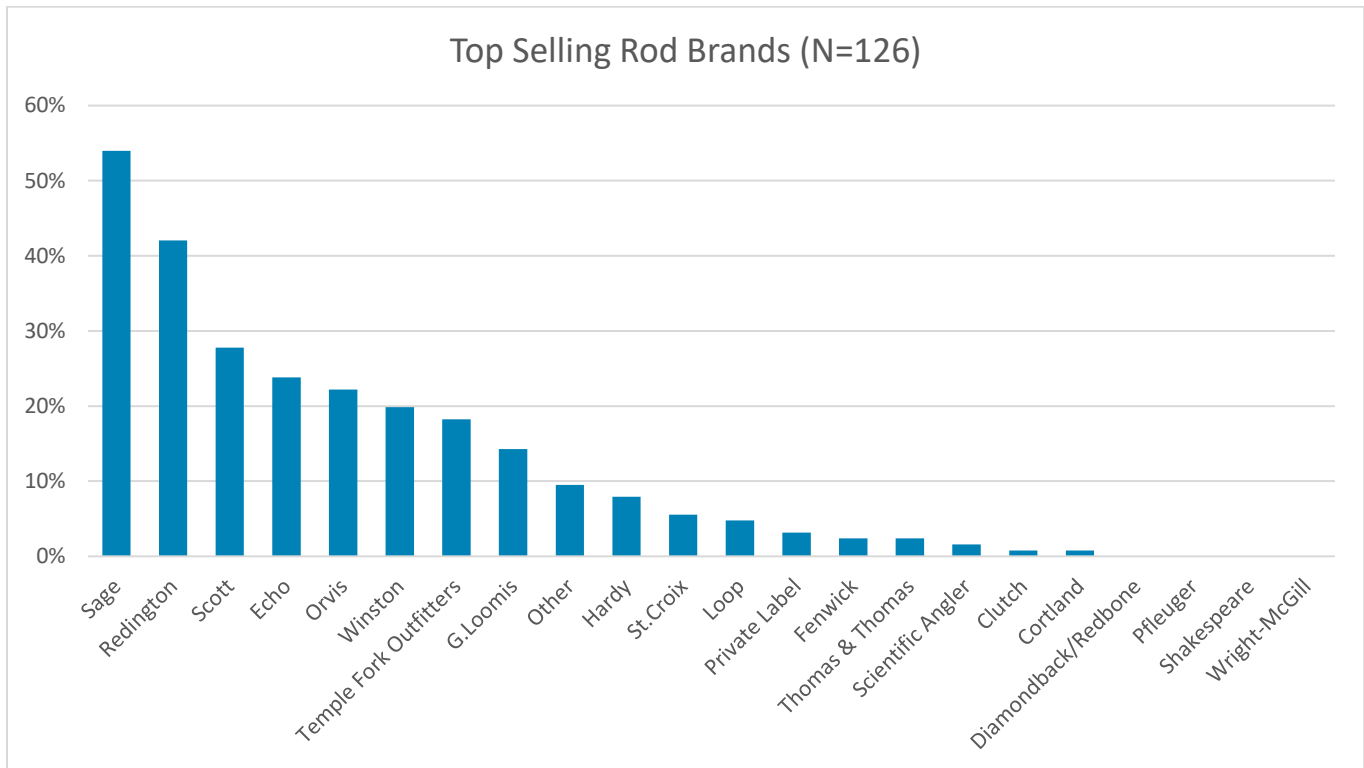
	North Central	Rockies	South	Northeast	West	National
Apparel (shirts, jackets, hats etc.)	7.2%	8.8%	12.7%	2.9%	5.0%	7.9%
Combos	5.1%	3.0%	3.8%	1.4%	3.3%	3.3%
Destination travel	0.0%	4.5%	0.5%	0.0%	3.2%	2.4%
Educational classes	3.1%	1.2%	0.9%	0.1%	2.1%	1.5%
Eyewear	2.8%	3.8%	2.8%	2.1%	1.0%	2.8%
Flies	19.0%	19.1%	10.6%	28.6%	14.7%	17.7%
Fly lines	8.3%	4.4%	6.1%	7.8%	8.0%	6.3%
Fly rods	8.9%	7.2%	11.6%	12.8%	13.1%	9.9%
Fly tying materials	9.6%	5.8%	7.2%	14.0%	10.5%	8.3%
Watercraft and accessories	1.4%	0.8%	3.1%	0.3%	2.8%	1.6%
Gifts, books & DVDs	1.2%	1.3%	1.1%	0.7%	0.6%	1.1%
Leaders and tippets	4.8%	5.0%	5.9%	6.6%	5.0%	5.3%
Other (tools, nets, etc.)	3.7%	3.2%	2.8%	3.9%	4.6%	3.5%
Outfitting, local guide services	6.6%	19.8%	10.9%	0.3%	7.2%	11.9%
Packs, bags & vests	2.9%	2.1%	4.6%	3.8%	2.4%	2.9%
Reels	8.1%	6.4%	7.7%	9.7%	11.5%	8.1%
Waders and boots	7.6%	3.8%	8.0%	5.3%	5.0%	5.4%
<b>Total</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>
<b>Number of Respondents</b>	<b>N=16</b>	<b>N=44</b>	<b>N=20</b>	<b>N=12</b>	<b>N=21</b>	<b>N=113</b>

## Top Brands by Category

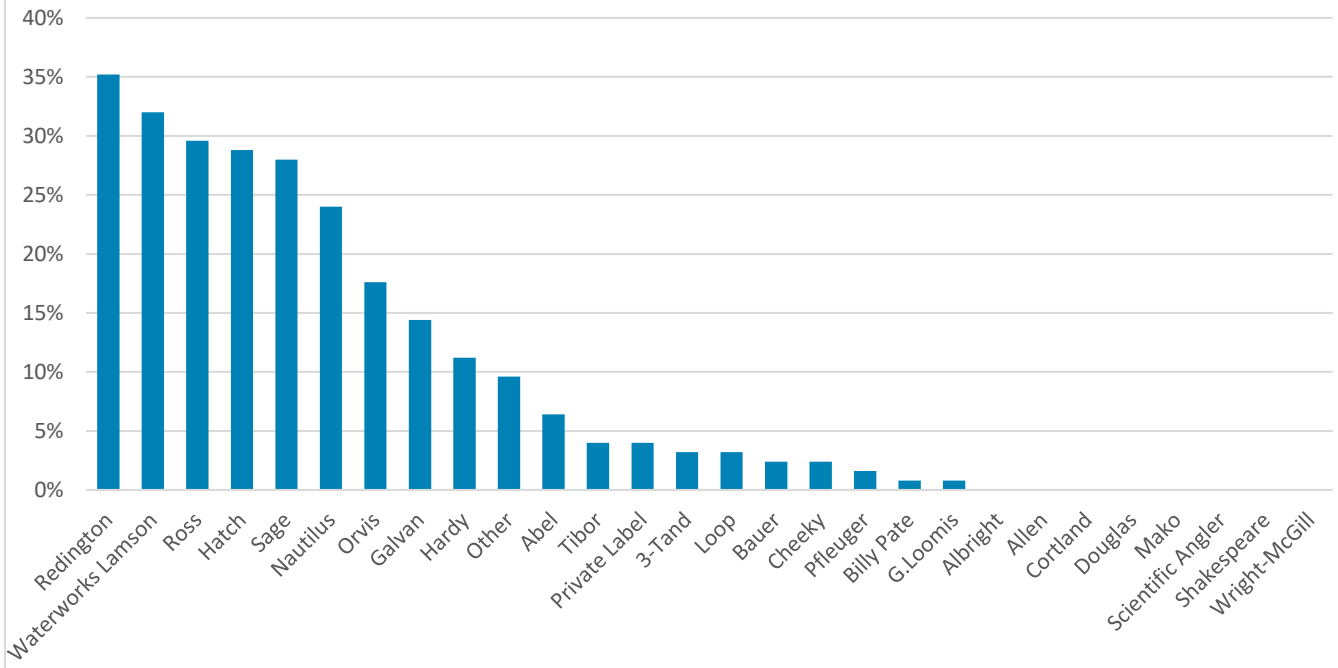
This section ranks the brands sold most frequently in 2017, as reported by fly fishing retailers.

\*Note – Other write-ins for the top brands are listed in Appendix A.

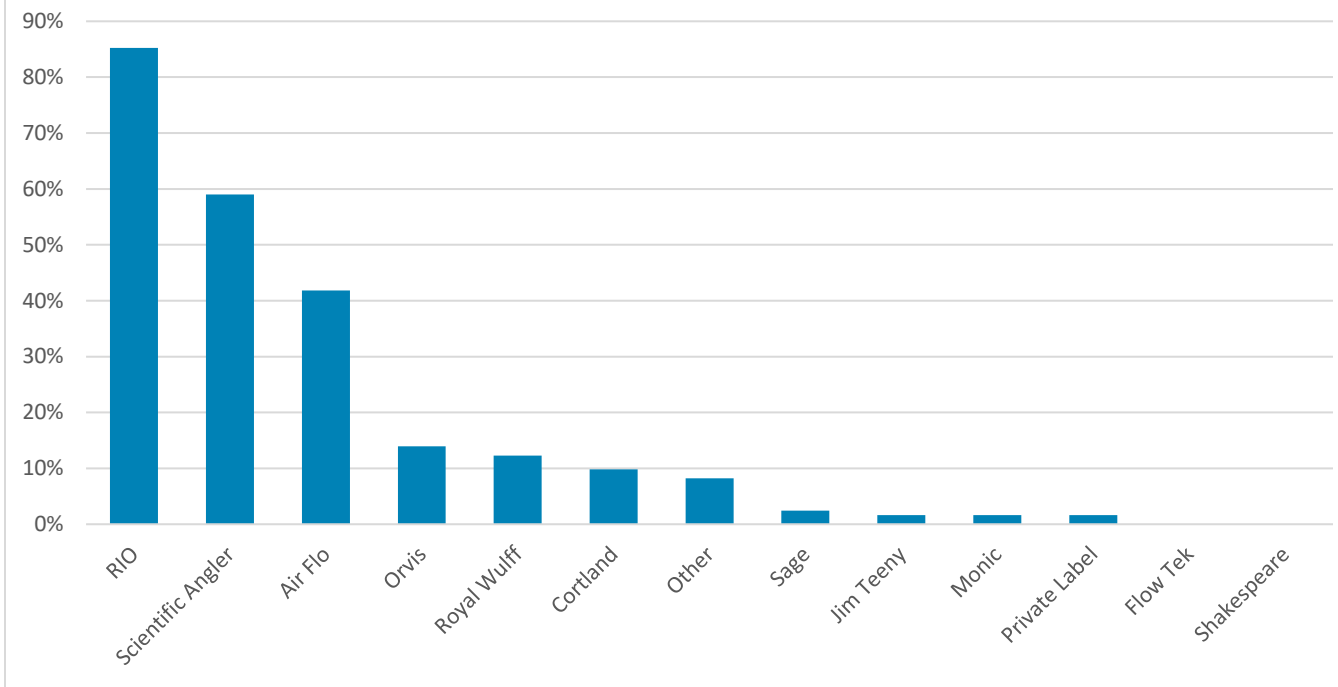
*Survey Question:* Please select your top three best-selling brands for the seven categories below.



Top Selling Reel Brands (N=125)

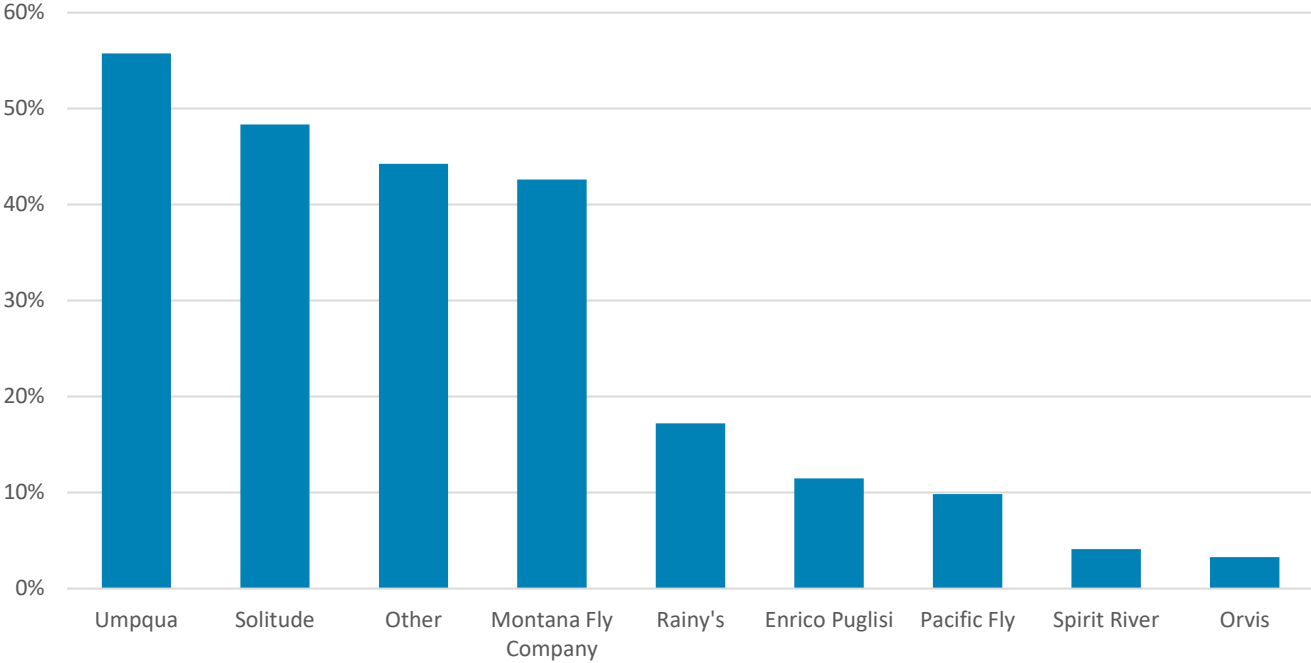


Top Selling Fly Line Brands (N=122)

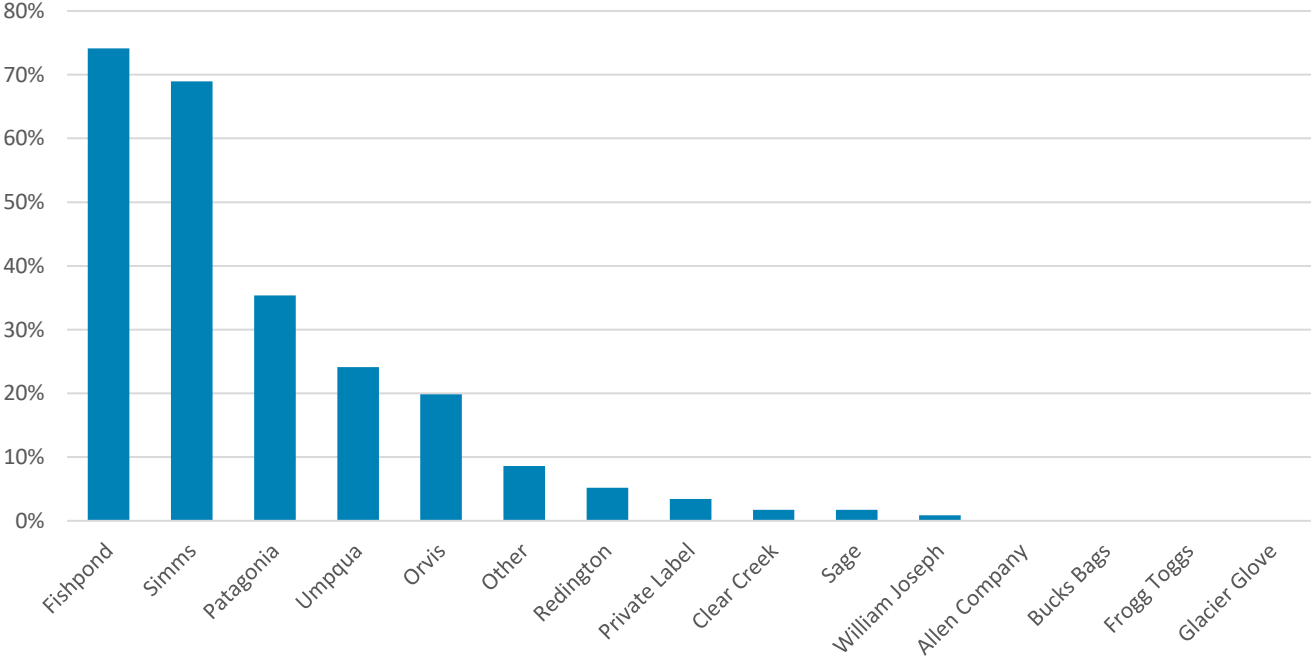




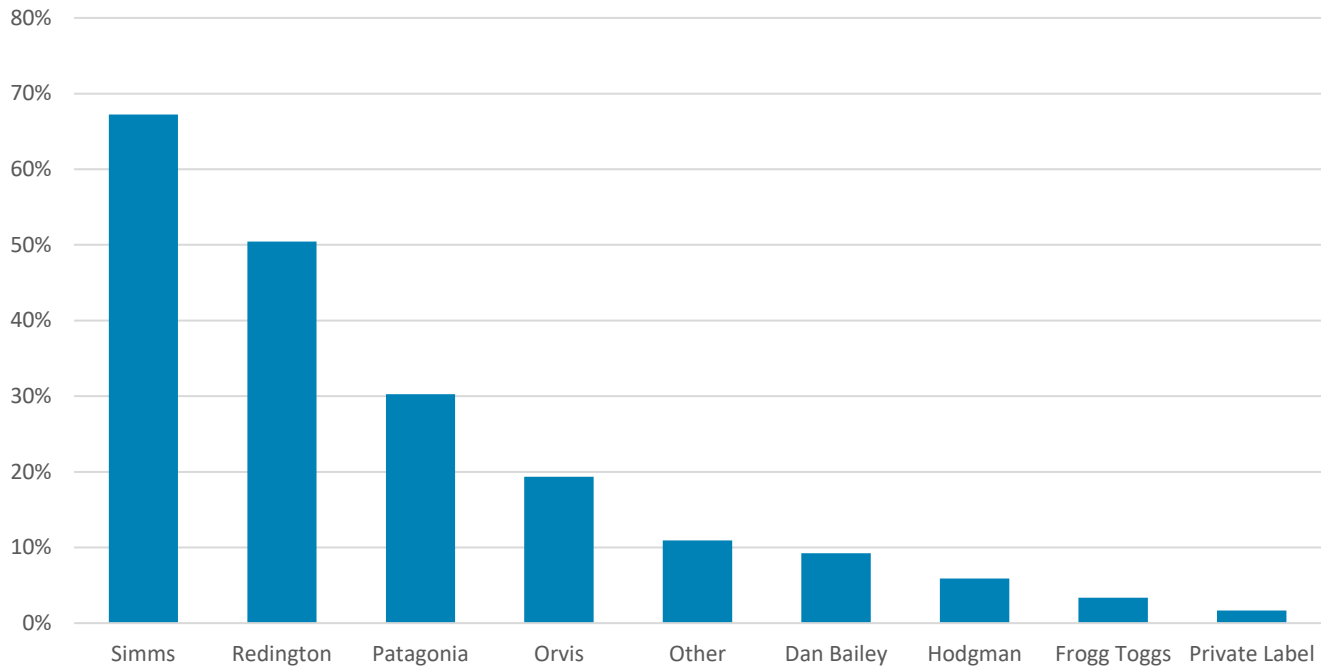
Top Selling Fly Brands (N=122)



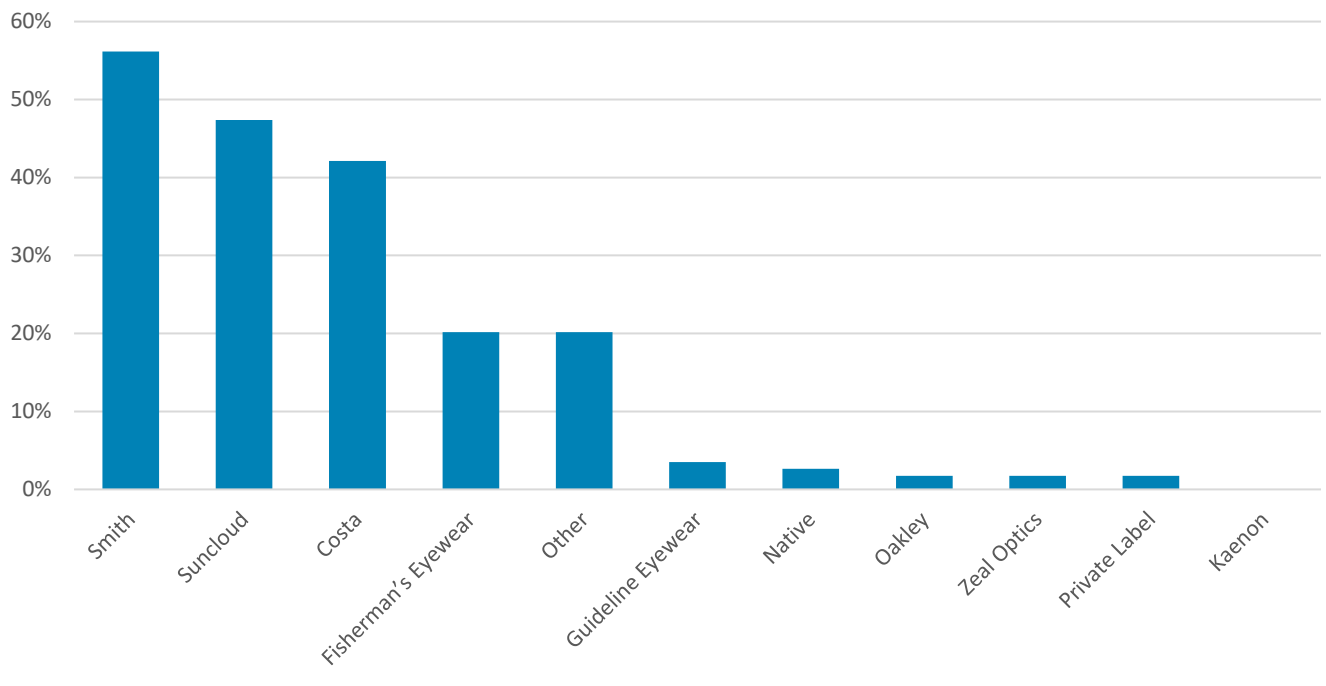
Top Selling Pack, Bag & Vest Brands (N=116)



Top Selling Wader Brands (N=119)



Top Selling Eyewear Brands (N=114)



## Sale Trends 2016-2017

Survey Question: In percentage terms, how much were your 2017 gross fly fishing-related sales up or down compared to 2016?

**Change in Net Sales, 2016 to 2017, Nationally: -0.6%**

Frequencies of respondents showing changes: Up, Down, or No Change

	Increase	Decrease	Stayed the Same	Total
2016 to 2017				
Percent of Retailers	73.3%	14.2%	12.5%	<b>100.0%</b>
Avg. Change	13.8%	-19.9%	0.0%	<b>-0.6%</b>
Number of Respondents	88	17	15	<b>120</b>

## Employees

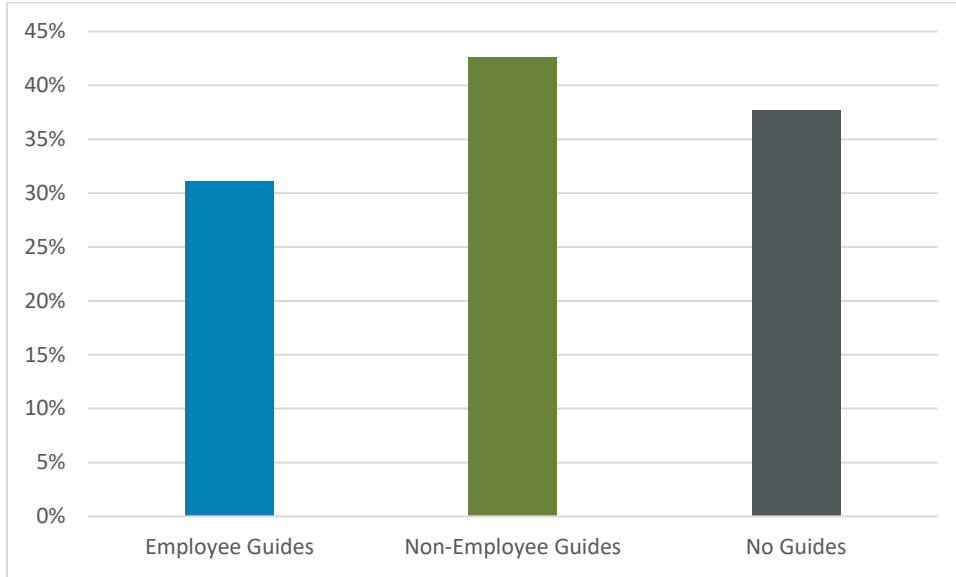
Survey Question: In 2016, how many shop employees in total did you have?



Employee Type	Average	Number of Respondents
Full Time	3.1	112
Part Time	2.9	89
Seasonal	4.1	74

## Guides

Survey Question: How many guides do you employ:



	Employee Guides	Non-Employee Guides	No Guides	Total
Percent	31.1%	42.6%	37.7%	100.0%
Avg. Number of Guides	4.41	4.49	0.0	---
Number of Respondents	38	52	46	122

\*the total will equal more than the 'respondents' number because each member can select more than one kind of guide.

## Fishing Licenses

Survey Question: Do you sell fishing licenses?

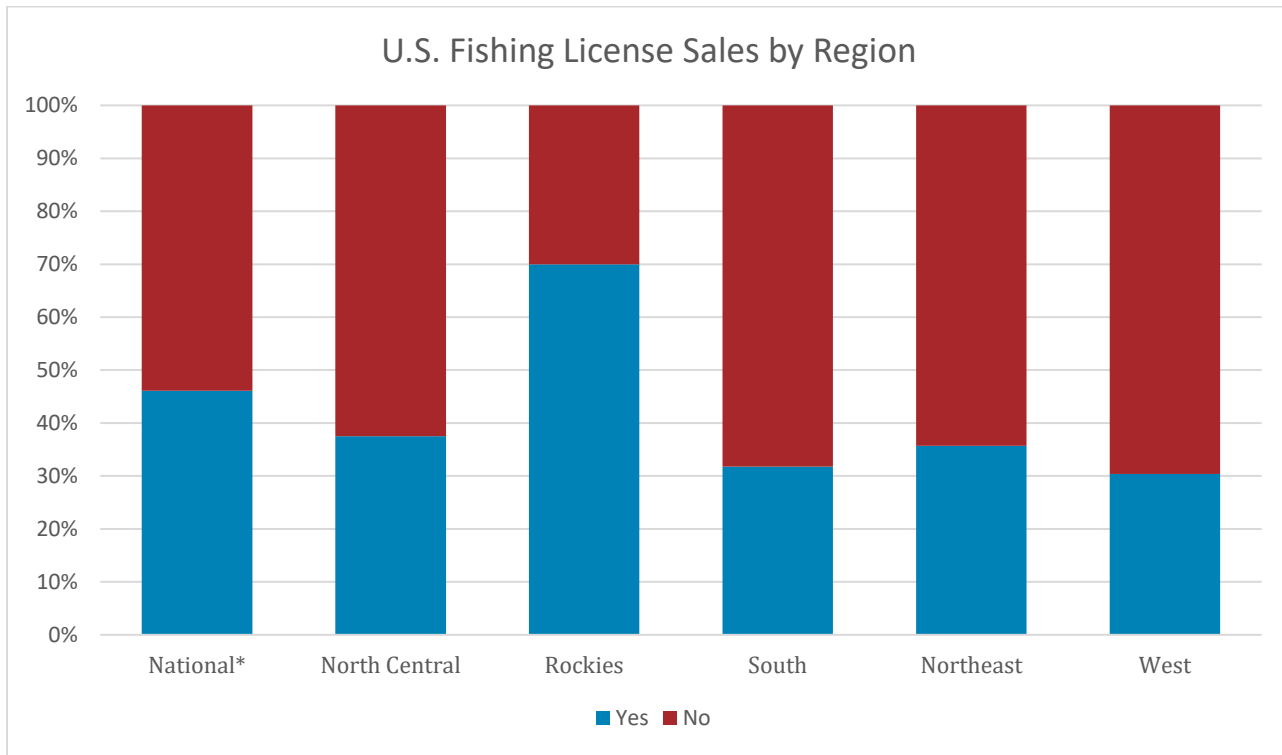
Do you sell fishing licenses?

	Yes	No	Total
Percent	46.3%	53.7%	100.0%
Number of Respondents	56	65	121

**Do you sell fishing licenses?**

		Region					
		National*	North Central	Rockies	South	Northeast	West
<b>Do you sell fishing licenses?</b>	Yes	46.1%	37.5%	70.0%	31.8%	35.7%	30.4%
	No	53.9%	62.5%	30.0%	68.2%	64.3%	69.6%
	Responses	N=115	N=16	N=40	N=22	N=14	N=23

\*Only includes US totals



**Survey Question: Please check which business associations you currently belong to:**

Business Association	Total %	Number of Responses
American Fly Fishing Trade Association (AFFTA)	58.7%	71
Chamber of Commerce (local, state or national)	48.8%	59
Other	14.0%	17
Better Business Bureau	11.6%	14
National Federation of Independent Businesses	7.4%	9
Outdoor Industry Association (OIA)	4.1%	5
American Sportfishing Association (ASA)	3.3%	4
National Sporting Goods Association	0.0%	0
<b>Total Responses</b>		<b>121</b>

## Appendix A – Brand Write-ins

### **(Other) Top Selling Fly Rod Brands**

Beulah  
Douglas  
EPIC  
Mystic  
PAC bay  
Soldarini, Hanak  
Vintage and used equipment  
Wade Rod Co  
We only sell flies  
Woodard Rod Company  
Yellowstone

### **(Other) Top Selling Fly Reel Brands**

echo  
Echo (2)  
Maxxon Outfitters & Nu-Cast  
Nucast  
Soldarini, Hanak  
st croix  
Tayloy Reels  
vintage and used  
we only sell flies  
Yellowstone

### **(Other) Top Selling Fly Line Brands**

ARC  
Hatch  
Maxxon Outfitters  
Soldarini, Hanak  
st croix  
Tayloy Reels  
vintage and used  
we only sell flies  
Yellowstone

**(Other) Top Selling Brands of Flies**

Aqua Flies  
Blacks as Spirit River went out of business in 2016  
catch  
Catch (5)  
Catch Flies  
Catch Fly Fishing  
Catch, Fulling Mill  
Catch, Holly  
Custom  
custom US tied  
Dream Cast  
Dreamcast (3)  
Dreamcast & Fulling Mill  
Dry Fly Innovations  
Flies by Ilene flies  
Fulling Mill (3)  
Hand tied  
independent  
Jackson Cardinal  
JD Flies  
JD Flies & Catch  
Local tied  
Locally tied  
Our own flies  
Postfly  
PRIVATE LOCAL  
shop tied  
Sierra Flies and we tie 50%  
Soldarini  
Spirit river is out of business as of 2016  
Superfly  
vintage  
We produce our own  
World class flies

**(Other) Top Selling Packs, Bags, & Vest Brands**

adams built  
none  
pacific fly  
Pacific Fly  
Soldarini  
Tfo  
Vedavoo  
We only sell flies

**(Other) Top Selling Wader Brands**

adams built  
Aquaz  
Caddis  
Chota  
Compass 360  
Compass360  
none  
we only sell flies  
we only sell two

**(Other) Top Selling Eyewear Brands**

clics  
cocoons  
Cocoons  
Epoc  
maui jim  
Maui Jim  
maxx  
Maxx (2)  
none  
Only cheap replacements  
Orvis  
Orvis/cheap  
Reflekt, Flying Fisherman  
Strike King  
Suncloud  
We only sell cheap replacements  
we only sell flies  
We only sell two