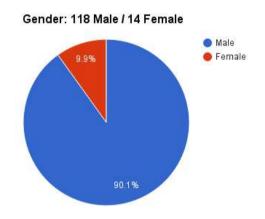
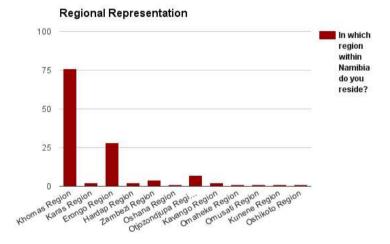


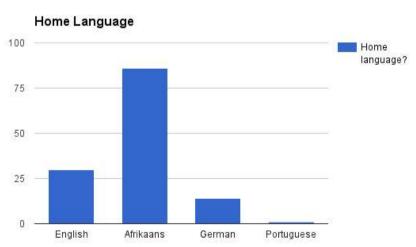
Detailed Findings of the Namibian Recreational and Competitive Angling Survey

Commencement Date: 19th of January 2016

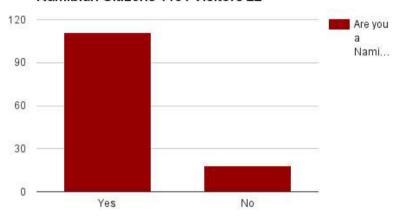
Total Verified Responses: 132



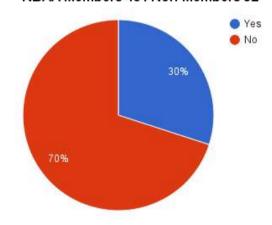




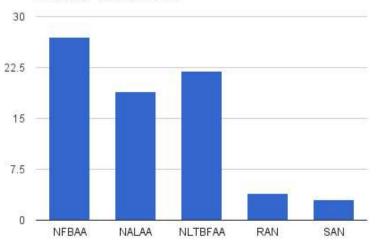
Namibian Citizens 110 / Visitors 22



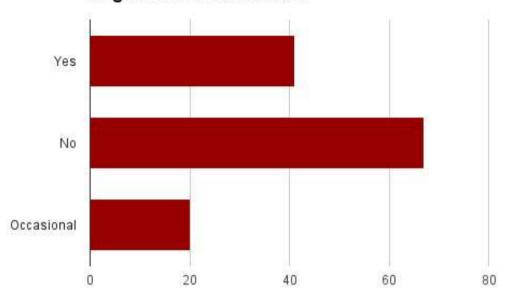
NBAA Members 40 / Non-Members 92



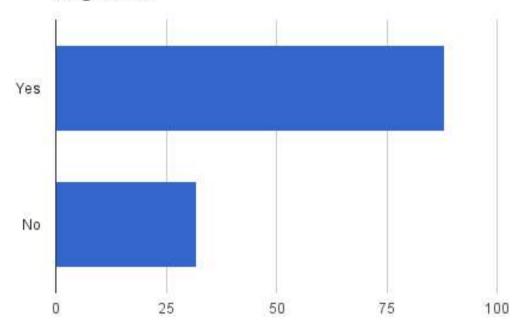
Other NFFA Members

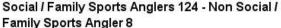


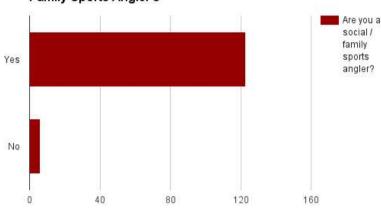
Tournament Anglers 44 / Non Tournament Anglers 68 / Occasional 20



Social / Family Anglers 86 - Non Social Family Anglers 32

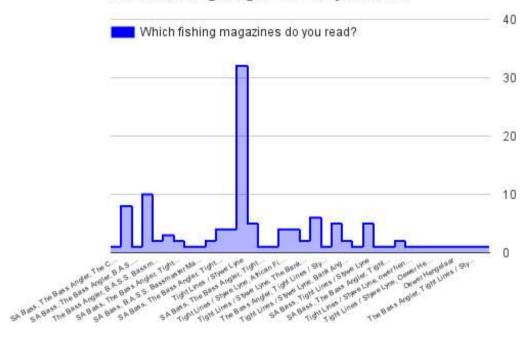






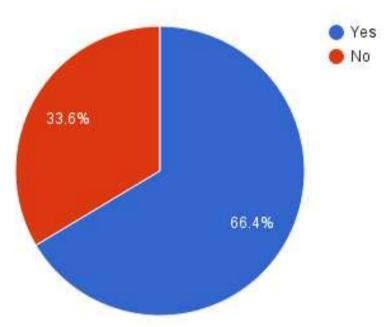
Namibian Economic Impacts:

Which fishing magazines do you read?

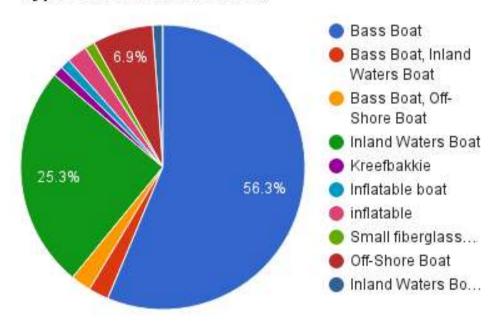


Fishing magazines are sold in supermarkets, news outlets, quick shops, tackle shops, fruit & vegetable shops and many other places. One will find a fishing magazine of some sort in any town in Namibia. The magazines average sales price is about N\$ 30.00 each. As can be seen in the graph pictured above, all anglers surveryed read at least one fishing magazine with the majority reading at least 2 different publications. This equates to an average monthly expenditure of N\$ 6000 just on the purchase of fishing magazines. A total of at least N\$ 72 000.00 annually just on fishing magazines just from the people that participated in the survey.

Boat Owner 88 / Non Boat Owners 44

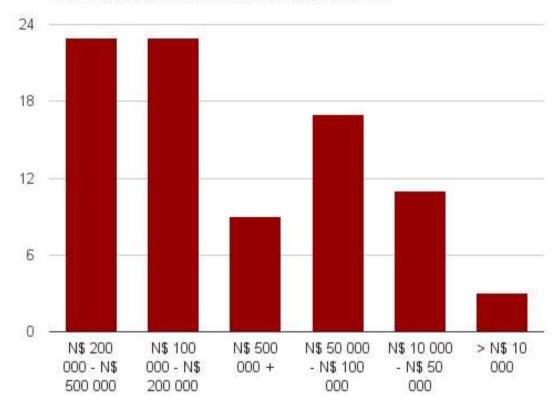


Types of boats in Namibia





Value brackets of Namibian owned boats



Boat Value Averages (out of 88 boat owners surveyed):

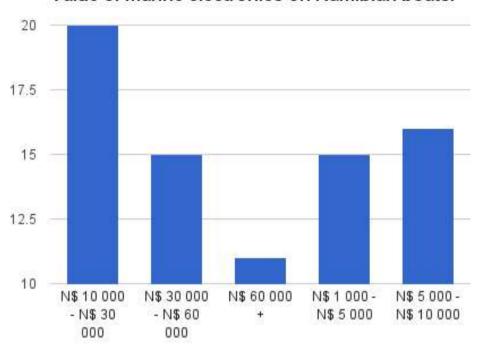
1.	22 @ N\$ 200 000 - N\$ 500 000	= Average N\$ 350 000 =	N\$ 7,7 Million
2.	22 @ N\$ 100 000 - N\$ 200 000	= Average N\$ 150 000 =	N\$ 3,3 Million
3.	9 @ N\$ 500 000 Plus	= Average N\$ 750 000 =	N\$ 6,75 Million
4.	17 @ N\$ 50 000 - N\$ 100 000	= Average N\$ 75 000 =	N\$ 1,275 Million
5.	11 @ N\$ 10 000 – N\$ 50 000	= Average N\$ 30 000 =	N\$ 0,33 Million
6.	3 @ > N\$ 10 000	= Average N\$ 5 000 =	N\$ 0,015 Million
			N\$ 19.37 Million

44 survey responders indicated that they don't own boats. The other 88 which indicated that they do own boats to the value of N\$ 13,37 million.

Some of these boats have been imported and some were locally manufactured by Namibian companies such as ESB Boats, Ruffnek Boats Namibia and African Skiffs. These companies employ Namibians and depend on boat owners to stay in business.



Value of marine electronics on Namibian boats.

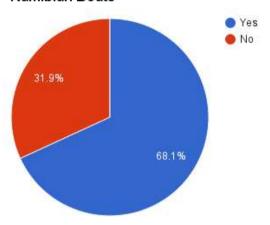


Marine Electronics Value Averages (out of 88 boat owners surveyed):

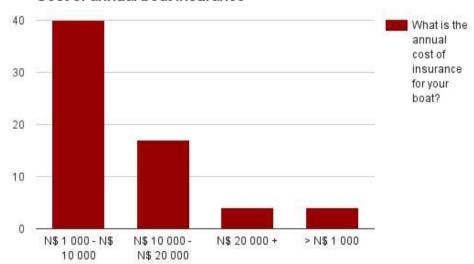
1.	20 @ N\$ 10 000 - N\$ 30 000	0 = Average N\$ 20 000	= N\$ 400 000
2.	15 @ N\$ 30 000 - N\$ 60 000	0 = Average N\$ 45 000	= N\$ 675 000
3.	11 @ N\$ 60 000 Plus	= Average N\$ 75 000	= N\$ 825 000
4.	15 @ N\$ 1 000 - N\$ 5 000	= Average N\$ 3 500	= N\$ 52 500
5.	16 @ N\$ 5 000 - N\$ 10 000	= Average N\$ 7 500	= N\$ 120 000
		-	= N\$ 2 072 500

The average marine electronics total value out of 88 boat owners is **N\$ 2 070 500 (2.07 Million).** All marine electronics are imported. The local economy is also boosted by the fitment and maintenance of marine electronics by local boating and marine experts.

Insured Namibian Boats 62 / 26 Non Insured Namibian Boats



Cost of annual boat insurance



Insurance Value Averages (out of 62 boat owners surveyed that have boat insurance):

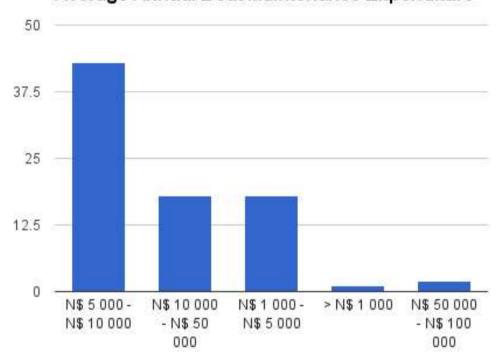
1. 40 @ N\$ 1 000 - N\$ 10 000 = Average N\$ 5 000 = N\$ 200 000 2. 16 @ N\$ 10 000 - N\$ 20 000 = Average N\$ 15 000 = N\$ 240 000 3. 3 @ N\$ 20 000 Plus = Average N\$ 30 000 = N\$ 90 000 4. 3 @ > N\$ 1 000 = Average N\$ 500 = N\$ 1 500

= N\$ 531 500

One average, out of 62 boat owners who insure their boats, the total expenditure on insurance amounts to **N\$ 531 500** annually. Insurance companies offer special boat insurance as their market for this bracket of insurance is vast.



Average Annual Boat Maintenance Expenditure



Boat maintenance average annual expenditure (out of 88 boat owners surveyed):

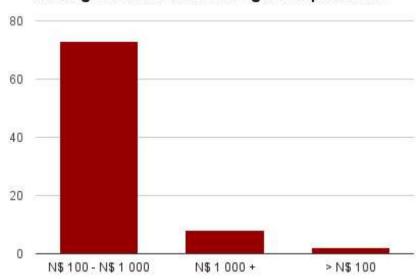
3. 15 @ N\$ 1 000 – N\$ 5 000	= Average N\$ 2 500	= N\$ 37 500
4. 1 @ > N\$ 1 000 5. 2 @ N\$ 50 000 – N\$ 100 000	= Average N\$ 500 = Average N\$ 75 000	= N\$ 500 = N\$ 150 000
4. 1 @ > N\$ 1 000	= Average N\$ 500	= N\$ 500

Marine service centres like Surf & Turf Service Centre, West Coast Marine, Caprivi Marine & Outboard Services and Skeleton Coast Marine Services all depend anglers that own boats. They create employment and add value to the Namibian economy to the tune of **0,945 Million Namibian Dollars** annually.



= N\$ 48 100

Average boat trailer licencing fee expenditure

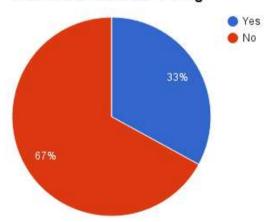


Boat trailer licencing fee average (out of 88 boat owners surveyed):

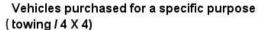
1.	74	· @ N\$ 100 – N\$ 1 000	= Average N\$ 500	= N\$ 36 000
2.	8	@ N\$ 1 000 +	= Average N\$ 1 500	= N\$ 12 000
3.	2	@ > N\$ 100	= Average N\$ 50	= N\$ 100

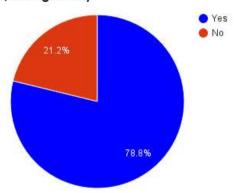
This reflect an annual average of N\$ 48 100 paid directly to the Namibia Roads Authority / NaTIS for boat trailer licenses.

Quantity of boats that have been towed across Namibia's borders for fishing.

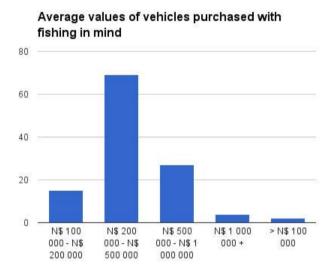


30 out the 88 surveyed boat owners have towed their boats across borders for fishing.





Anglers purchase vehicles for specific reasons like the towing of boats as well as for off road capabilities. 104 out of 132 survey respondents purchased 4 X 4 vehicles specifically with angling and towing in mind.



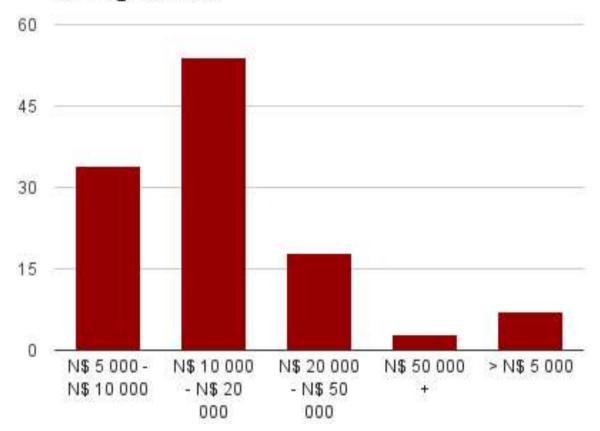
Average values of vehicles purchased with fishing in mind out of 132 survey responses.

	15 @ N\$ 100 000 – N\$ 200 000		·	T / -	Million
2.	69 @ N\$ 200 000 - N\$ 500 000	= Average N	√\$ 350 000	= N\$ 24,15	Million
3.	28 @ N\$ 500 000 - N\$ 1 000 000)= Average N	\\$ 750 000	= N\$ 21	Million
4.	3 @ N\$ 1 000 000 +	= Average N	\\$ 1 250 000	= N\$ 3,75	Million
5.	2 @ > N\$ 100 000	= Average N	1\$ 50 000	= N\$ 0,1	Million
				= N\$ 51,25	Million

An average total of **51.25 Million Namibian Dollars** spent by anglers surveyed to purchase vehicles intended for a specific purpose such as towing a boat or for off road driving.



Annual average insurance costs for towing I fishing vehicle.



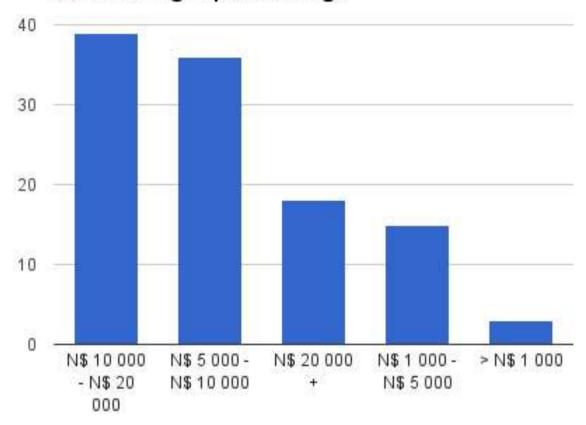
Average annual insurance cost for vehicles purchased for towing / fishing.

5. 8 @ > N\$ 5 000	= Average N\$ 2 500	= N\$ 20 000 = N\$ 1 815 000
4. 2 @ N\$ 50 000 +	= Average N\$ 75 000	= N\$ 150 000
3. 17 @ N\$ 20 000 – N\$ 50 000	= Average N\$ 35 000	= N\$ 595 000
2. 53 @ N\$ 10 000 – N\$ 20 000	= Average N\$ 15 000	= N\$ 795 000
1. 34 @ N\$ 5 000 – N\$ 10 000	= Average N\$ 7 500	= N\$ 255 000

An annual average of N\$ 1.8 million spent by bass anglers / sports anglers to ensure their vehicles.



Average fuel expenditure for vehicles used for bass fishing / sport fishing.



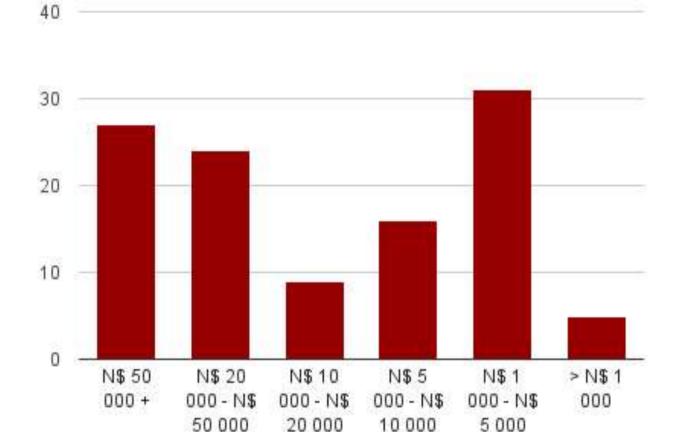
Average annual fuel expenditure for bass and sports anglers.

5.	3 @ > N\$ 1 000	= Average N\$ 500	= N\$ 1 500 = N\$ 1 269 000
	15 @ N\$ 1 000 – N\$ 5 000	= Average N\$ 3 500	= N\$ 52 500
	18 @ N\$ 20 000 +	= Average N\$ 20 000	= N\$ 360 000
2.	36 @ N\$ 5 000 – N\$ 10 000	= Average N\$ 7 500	= N\$ 270 000
1.	39 @ N\$ 10 000 - N\$ 20 000	= Average N\$ 15 000	= N\$ 585 000

The 132 surveyed bass and sports anglers spend an average of N\$ 1,269 Million on fuel specifically used for bass or sports angling annually. The fuel average is only for vehicle fuel and does not include boat fuel.



Value of bass fishing tackle.



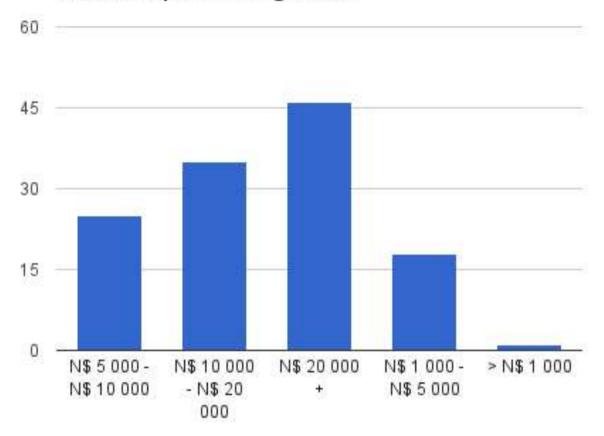
Value of bass fishing tackle.

1. 27 @ N\$ 50 000 +	= Average N\$ 50 000	= N\$ 1 350 000
2. 24 @ N\$ 20 000 - N\$ 50 000	= Average N\$ 35 000	= N\$ 840 000
3. 9 @ N\$ 10 000 – N\$ 20 000	= Average N\$ 15 000	= N\$ 135 000
4. 16 @ N\$ 5 000 – N\$ 10 000	= Average N\$ 7 500	= N\$ 120 000
5. 4 @ > N\$ 1 000	= Average N\$ 500	= N\$ 2 000
	-	= N\$ 2 447 000

On average, out of 132 surveyed participants, Namibians own almost **N\$ 2,5 million** just in bass fishing tackle. Angling and tackle shops such as Bushwhackers, Cymot and Surf & Turf Service Centre rely on tackle sales. Specialist staffs, with in-depth fishing knowledge are employed to keep track of all of the latest trends and products to make sure that the consumer gets what they are looking for.



Value of sport fishing tackle.



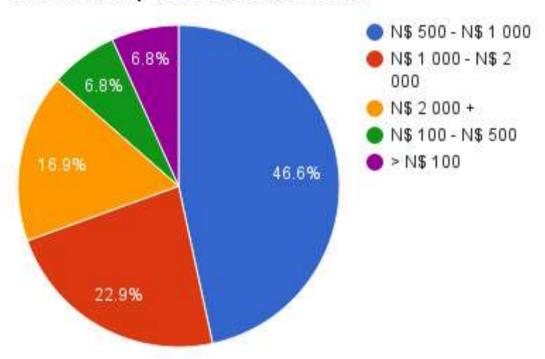
Value of sport fishing tackle.

		_	= N\$ 1 670 000
5.	1 @ > N\$ 1 000	= Average N\$ 500	= N\$ 500
4.	17 @ N\$ 1 000 – N\$ 5 000	= Average N\$ 3 500	= N\$ 59 500
3.	46 @ N\$ 20 000 +	= Average N\$ 20 000	= N\$ 920 000
2.	34 @ N\$ 10 000 – N\$ 20 000	= Average N\$ 15 000	= N\$ 510 000
	24 @ N\$ 5 000 - N\$ 10 000	= Average N\$ 7 500	= N\$ 180 000

On average, out of 132 surveyed participants, Namibians own almost **N\$ 1,7 million** in sport fishing tackle. Angling and tackle shops such as Bushwhackers, Cymot, Surf & Turf Service Centre, West Coast Marine, Super Sports and Commercial Marine rely on tackle sales. Specialist staffs, with in-depth fishing knowledge are employed to keep track of all of the latest trends and products to make sure that the consumer gets what they are looking for.



Average annual expenditure on club fees I membership fees I affiliation fees.



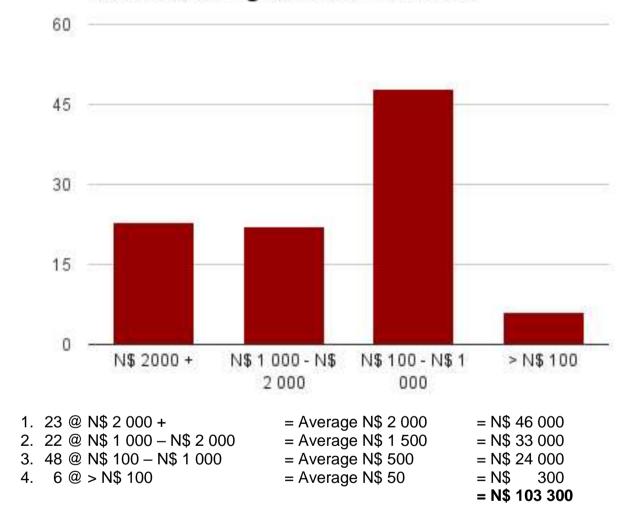
Associations, clubs and federations drive competitive angling in Namibia. People run all associations, clubs and federations on a voluntary basis. They do not receive remuneration for these tasks, but do it simply for the love and the betterment and improvement of the sport. Without membership fees these clubs would not exist. We must not forget that both freshwater angling as well as seawater angling are registered and official coded Namibian sports, as per the Namibia Sports Commission.

Average amount spent by Namibians of club fees / membership fees / affiliation fees (out of 132 survey responses):

1	46.6% @ N\$ 500 - N\$ 1 000	= Average N\$ 750	= N\$ 45 750
		•	
2.	22.9% @ N\$ 1 000 – N\$ 2 000	= Average N\$ 1 500	= N\$ 45 000
3.	16.9% @ N\$ 2 000 +	= Average N\$ 2 000	= N\$ 44 000
4.	6.8% @ N\$ 100 - N\$ 500	= Average N\$ 350	= N\$ 3 150
	6.8% @ > N\$ 100	= Average N\$ 50	= N\$ 450
	·	5 .	= N\$ 138 350



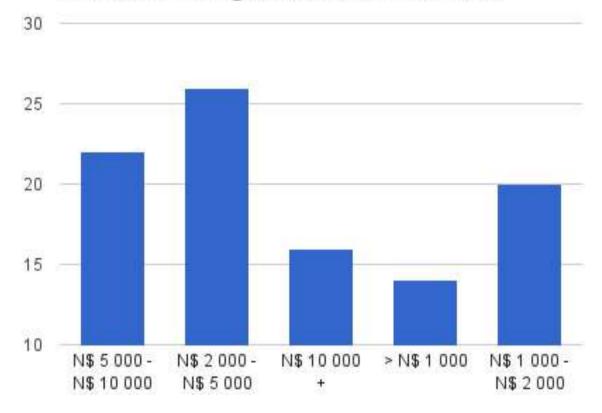
Average expenditure by Namibians on entry fees I boat launching fees within Namibia.



Over N\$ 100 000 spent just on entry fees / boat launching fees. A large portion of this amount is paid to Namibia Wildlife Resorts as S. Von Bach dam lies within a NWR park, as well as entry fees to Hardap Resorts, also a NWR facility.



Average expenditure on accommodation at or near bass fishing venues within Namibia.



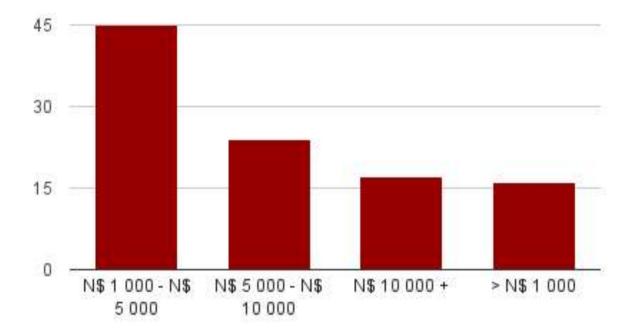
			= N\$ 453 000
5.	20 @ N\$ 1 000 – N\$ 2 000	= Average N\$ 1 500	= N\$ 30 000
	14 @ > N\$ 1 000	= Average N\$ 500	= N\$ 7 000
3.	16 @ N\$ 10 000 +	= Average N\$ 10 000	= N\$ 160 000
2.	26 @ N\$ 2 000 - N\$ 5 000	= Average N\$ 3 500	= N\$ 91 000
1.	22 @ N\$ 5 000 – N\$ 10 000	= Average N\$ 7 500	= N\$ 165 000

Tungeni Resort Von Bach, Lake Oanob Resort and other hotels, lodges and camping sites all benefit from bass / sport anglers. The hospitality industry contributes to employment within Namibia on a large scale. **N\$ 0.453 million** revenue per annum is directly connected to bass / sports anglers.



Average expenditure on food & beverage at lodging I hotels at or close to bass fishing venues within Namibia.

60

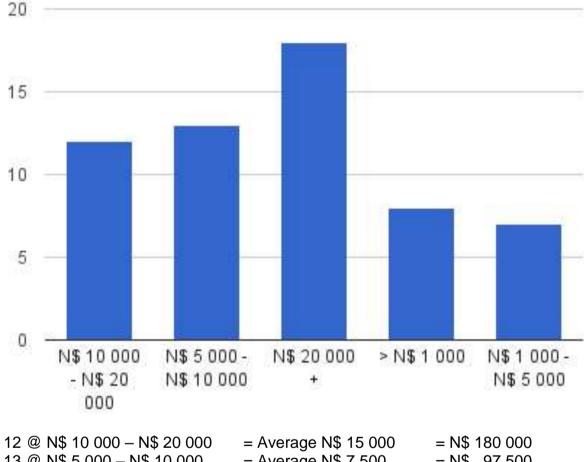


1. 45 @ N\$ 1 000 – N\$ 5 000	= Average N\$ 3 500	= N\$ 157 500
2. 23 @ N\$ 5 000 - N\$ 10 000	= Average N\$ 7 500	= N\$ 172 500
3. 17 @ N\$ 10 000 +	= Average N\$ 10 000	= N\$ 170 000
4. 14 @ > N\$ 1 000	= Average N\$ 500	= N\$ 7 000
	-	= N\$ 507 000

The 132 surveyed anglers, spend over **N\$ 0,5 million** per annum on food and beverage at hospitality venues at or close to bass fishing venues within Namibia's borders.



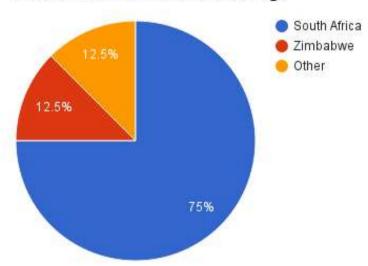
Average annual travel expenditure to reach foreign bass fishing venues?



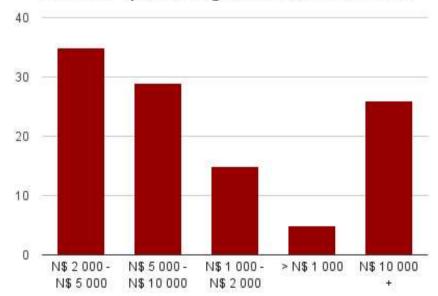
Surveyed anglers spend an average of **N\$ 0,666 million** on travel expenses alone to reach foreign bass fishing venues. Countries most frequently visited include Zimbabwe, South Africa, Botswana and Mozambique as indicated by the graph below. Namibians travel to foreign countries to experience bass fishing on another level and to compete in Tournaments. The Namibian National Bass Angling Team travels annually to compete in the Region 5 Bass Angling Federation Tournament, which is the only Region 5 event of its kind in southern Africa, attracting more than 80 anglers and officials from 6 Southern African countries.



Countries visited for bass fishing.



Average annual expenditure on accommodation at or near sport fishing venues within Namibia.



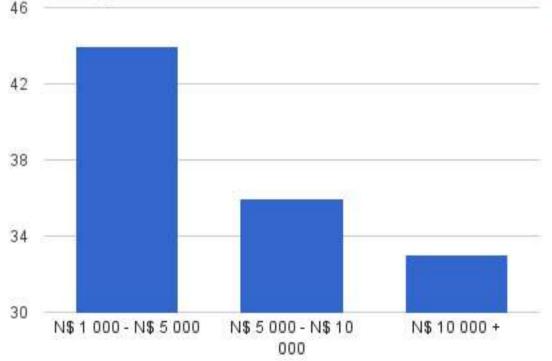
- 1. 35 @ N\$ 2 000 N\$ 5 000
- 2. 29 @ N\$ 5 000 N\$ 10 000
- 3. 14 @ N\$ 1 000 N\$ 2 000
- 4 @ > N\$ 1 000
- 5. 26 @ N\$ 10 000 +

- = Average N\$ 3 500
- = Average N\$ 7 500
- = Average N\$ 1 500
- = Average N\$ 500
- = Average N\$ 10 000
- = N\$ 122 500
- = N\$ 217 500
- = N\$ 21 000
- = N\$ 2 000 = N\$ 260 000



N\$ 0,623 million spent annually on accommodation by the 132 surveyed anglers at hospitality venues all over Namibia. Venues include all the lodges along the Okavango River, the Zambezi River, lodges and hotels along the Namibian Coastline, lodges and hotels close to or at dams in the south of Namibia such as Hardap Dam and Naute Dam as well as lodges or hotels at the Orange River.





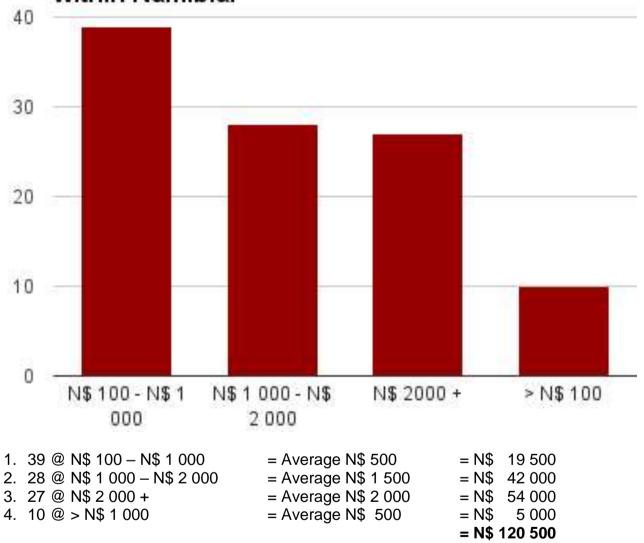
1.	44 @ N\$ 1 000 - N\$ 5 000	= Average N\$ 3 500	= N\$ 154 000
2.	36 @ N\$ 5 000 – N\$ 10 000	= Average N\$ 7 500	= N\$ 270 000
2	33 @ NI\$ 10 000 ±	- Average NI\$ 10 000	- VI& 330 000

3. 33 @ N\$ 10 000 + = Average N\$ 10 000 = N\$ 330 000 = **N\$ 754 000**

The 132 surveyed anglers spend **N\$ 0,754 million** spent annually on food & beverages at sport fishing venue within Namibia.



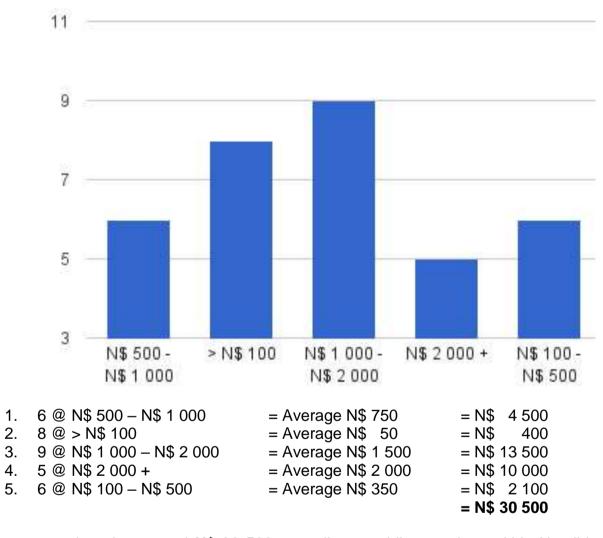
Average annual expenditure on entrance fees I boat launching fees at sport fishing venues within Namibia.



The 132 surveyed anglers spend **N\$ 120 500** annually on entrance fees and boat launching fees. Some of the fees include Namibia Wildlife Resort entrance fees, others include entry fees and boat launching fees imposed by various sport fishing venues within Namibia.



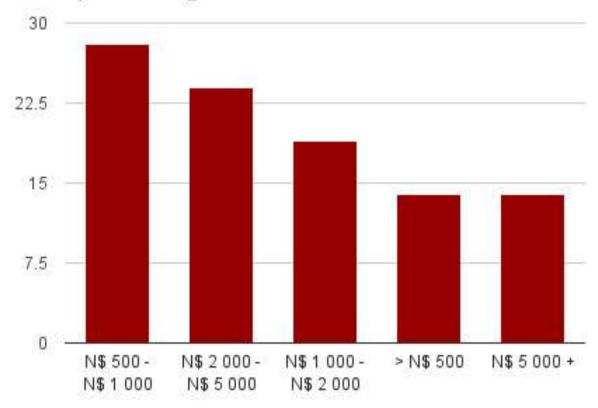
Average annual expenditure on guides I gillies within Namibia.



The surveyed anglers spend **N\$ 30 500** annually on guiding services within Namibia. These guides / gillies are mostly found on the Okavango River as well as the Zambezi River. These communities have become dependent on the funds received for their guiding services. These communities have in-depth knowledge of the river systems. We believe that these figures can increase, if more emphasis is put on the value of tourism potential, in recreational angling in Namibia.



Average annual expenditure on frozen bait for sport fishing.

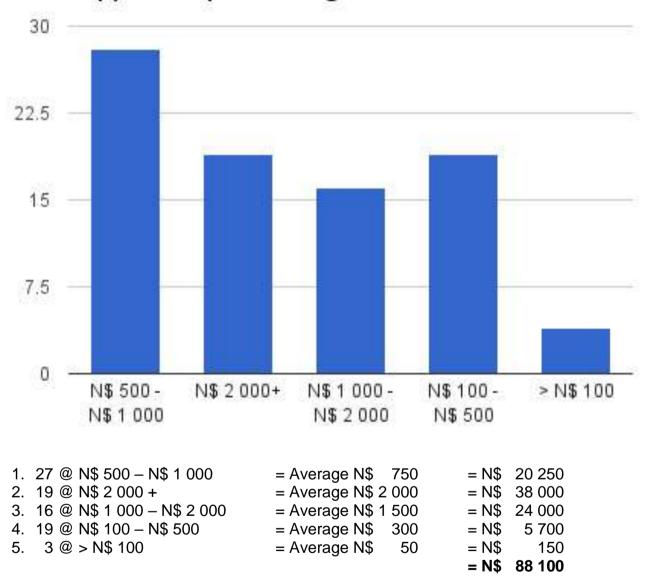


			= N\$ 2	06 250
5.	14 @ N\$ 5000 +	= Average N\$ 5 000	= N\$	70 000
4.	14 @ > N\$ 500	= Average N\$ 250	= N\$	3 500
3.	19 @ N\$ 1 000 – N\$ 2 000	= Average N\$ 1 500	= N\$	28 500
2.	24 @ N\$ 2 000 - N\$ 5 000	= Average N\$ 3 500	= N\$	84 000
1.	27 @ N\$ 500 – N\$ 1 000	= Average N\$ 750	= N\$	20 250

N\$ 206 250 spent annually by only the 132 anglers that participated in the survey. Frozen bait is stocked by tackle shops, general dealers and even by most service stations at the coast. The frozen bait industry includes frozen pilchards and other bait fish, octopus, squid, mussels, prawns and even crayfish.



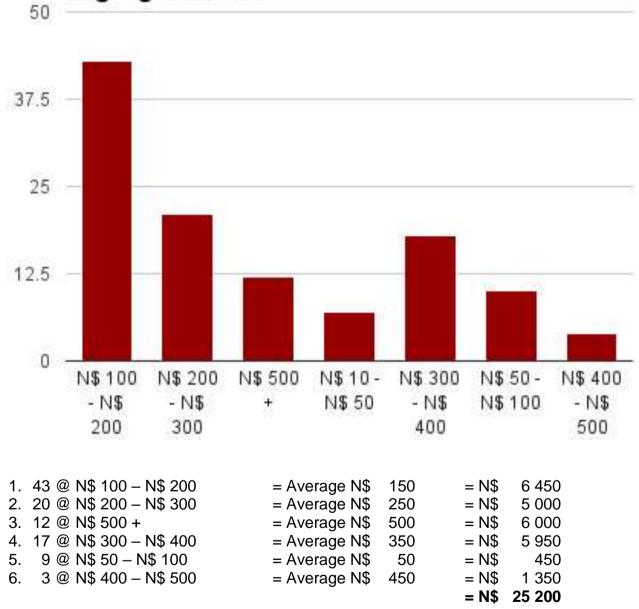
Average annual expenditure on local community support at sport fishing venues within Namibia.



N\$ 88 100 spent annually by the 132 surveyed anglers, supporting local communities that stay in or around sport fishing venues within Namibia. These communities have also become dependent on the income earned from anglers visiting various angling destinations all over Namibia.



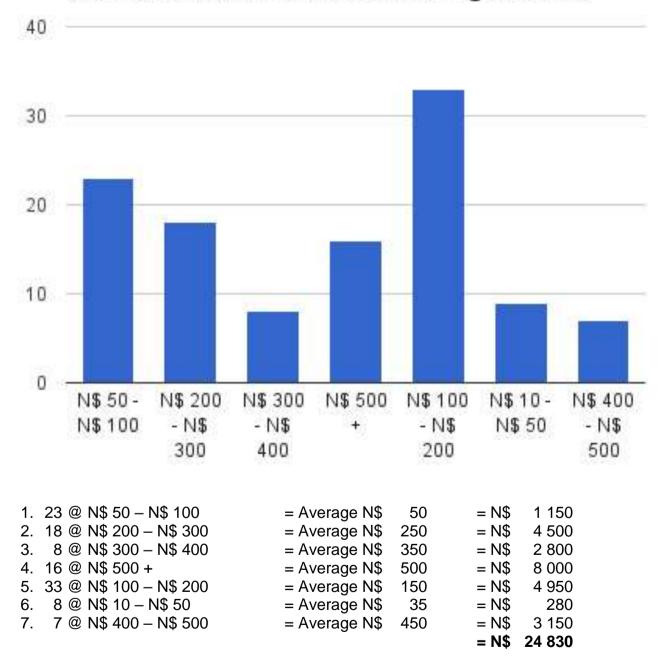
Average annual expenditure on Ministry of Fisheries & Marine Resources freshwater angling licenses.



An average of **N\$ 25 200** paid annually in license fees to the Ministry of Fisheries & Marine Resources for freshwater angling licenses. A fair number of surveyed anglers take out angling licenses for their families.



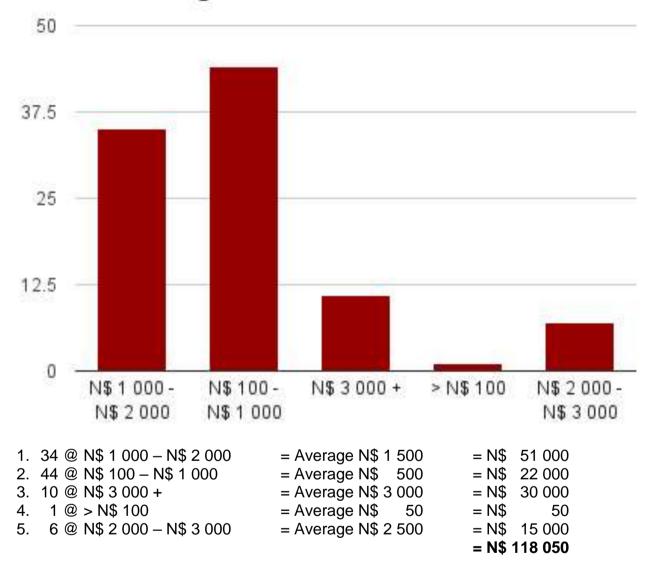
Average expenditure on Ministry of Fisheries & Marine Resources saltwater fishing licenses.



An average of **N\$ 24 830** paid annually in license fees to the Ministry of Fisheries & Marine Resources for salt water angling licenses. A fair number of surveyed anglers take out angling licenses for their families.



Average annual expenditure at car wash facilities after fishing.

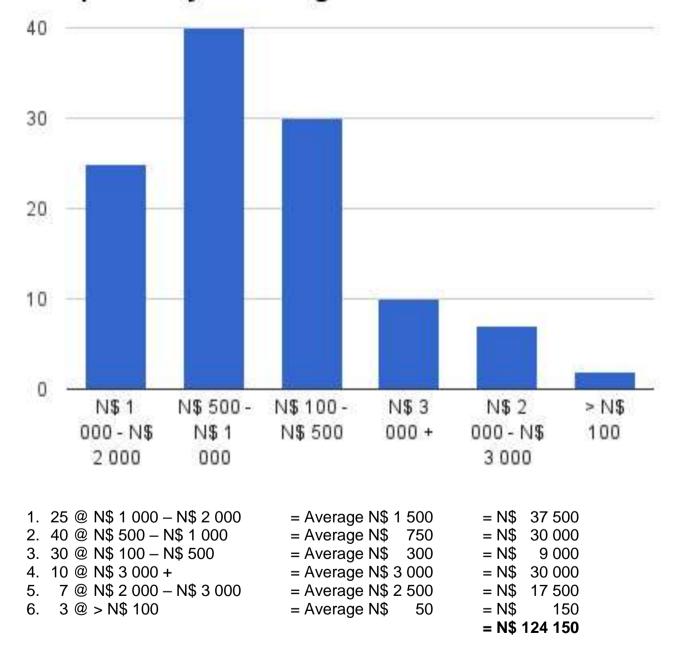


An average of N\$ 118 050 contributed annually by the 132 surveyed anglers to the car wash industry. The car wash industry in Namibia is big, creating a substantial amount of employment within Namibia.



www.nbaanamibia.com

Average annual expenditure on medical supplies specifically for fishing.

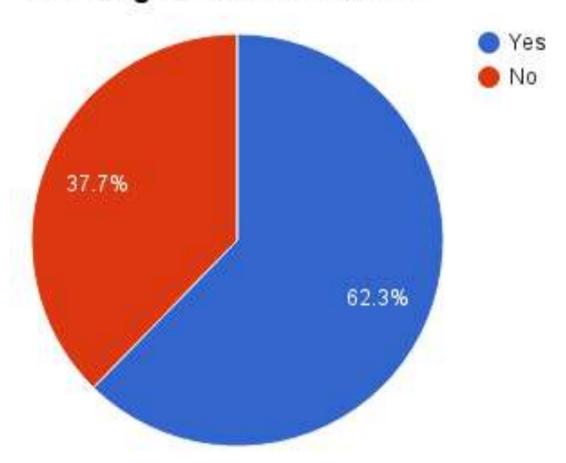


On average the surveyed anglers spend **N\$ 124 150** per annum on medical supplies intended for use on fishing expeditions. Supplies purchased include malaria medication, sun tan lotion and other medical supplies.



Foreign Economic Impacts:

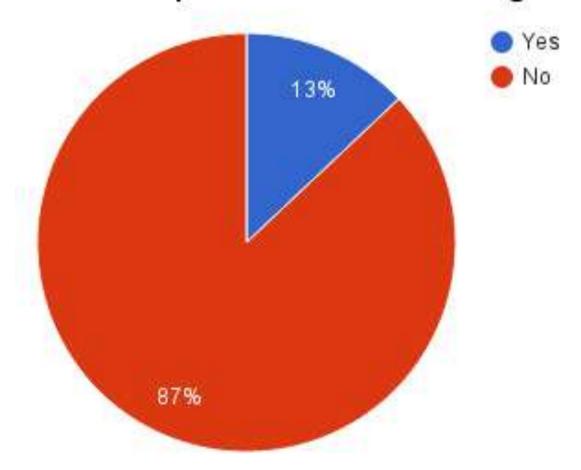
Count of surveyed anglers that have heard of Letsibogo Dam in Botswana.



62.3% of all anglers that participated in the survey have heard of Letsibogo Dam in Botswana. Currently Letsibogo Dam is probably the most famous and talked about bass fishing venue in Southern Africa.



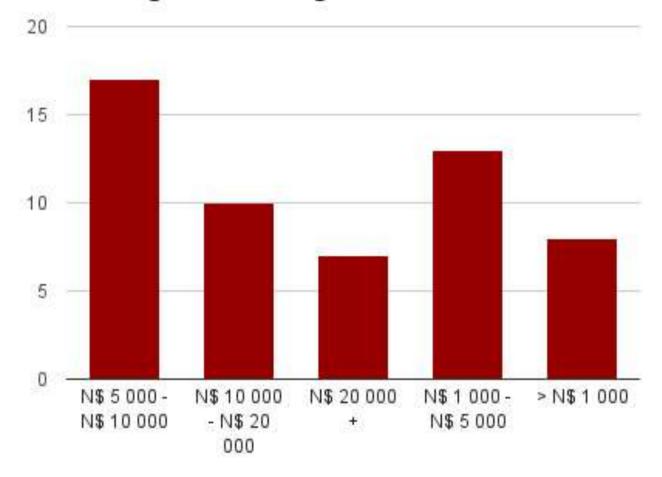
Count of anglers that have been to Letsibogo Dam to experience the bass fishing.



Out of 132 surveyed participants, 13% have actually travelled to Letsibogo Dam in Botswana purely to experience the bass fishing which Letsibogo Dam has to offer. Since bass were introduced into Letsibogo Dam the area has experienced a substantial boost in tourism. The lodges are boasting a high occupancy rate as anglers from all over Southern Africa and even as far as Europe travel to Selebi Pikwe to experience the bass fishing at Letsibogo Dam. (See other documentation about Letsibogo Dam).



Average annual expenditure on accommodation at foreign bass fishing venues.

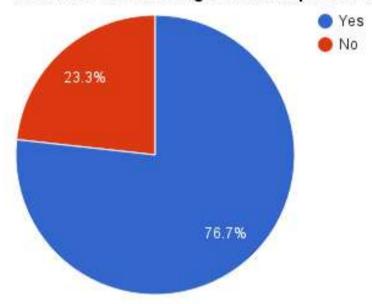


			= N\$ 460 500
5.	8 @ > N\$ 1 000	= Average N\$ 500	= N\$ 4 000
4.	13 @ N\$ 1 000 – N\$ 5 000	= Average N\$ 3 000	= N\$ 39 000
	7 @ N\$ 20 000 +	= Average N\$ 20 000	= N\$ 140 000
2.	10 @ N\$ 10 000 – N\$ 20 000	= Average N\$ 15 000	= N\$ 150 000
1.	17 @ N\$ 5 000 – N\$ 10 000	= Average N\$ 7 500	= N\$ 127 500

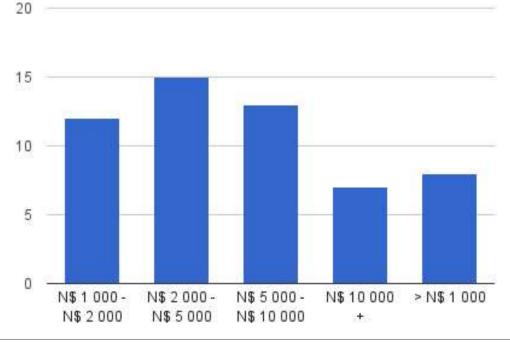
The surveyed participants spend **N\$ 460 500** annually on accommodation costs at foreign bass fishing venues. The graph below indicates that 76.7% of surveyed anglers would travel less should Namibia's bass fishing venues improve and increase in number. This essentially means that a large majority of the above expenditure would be spent in Namibia and not in foreign countries.



Percentage of surveyed anglers that would reduce their travels to foreign bass angling venues, should Namibia's bass fishing venues improve / increase.



Average annual expenditure on food & beverages at foreign bass angling venues.

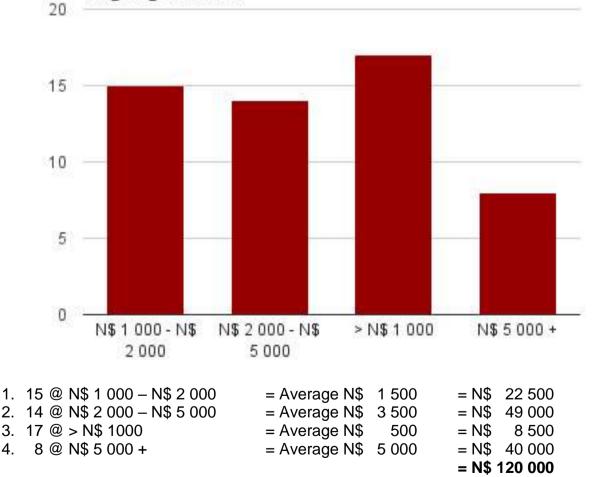




1.	12 @ N\$ 1 000 - N\$ 2 000	= Average N\$ 1 500	= N\$	18 000
2.	15 @ N\$ 2 000 – N\$ 5 000	= Average N\$ 3 500	= N\$	52 500
3.	13 @ N\$ 5 000 – N\$ 10 000	= Average N\$ 7 500	= N\$	97 500
4.	7 @ N\$ 10 000 +	= Average N\$ 10 000	= N\$	70 000
5.	8 @ > N\$ 1 000	= Average N\$ 500	= N\$	4 000
		-	= N\$	242 000

The surveyed participants spend **N\$ 242 000** per annum on food and beverages at foreign bass angling venues.

Average annual expenditure on entry fees / park fees / boat launching fees at foreign bass angling venues.



The surveyed participants spend **N\$ 120 000** per annum on entry fees / park fees / boat launching fees at foreign bass angling venues.