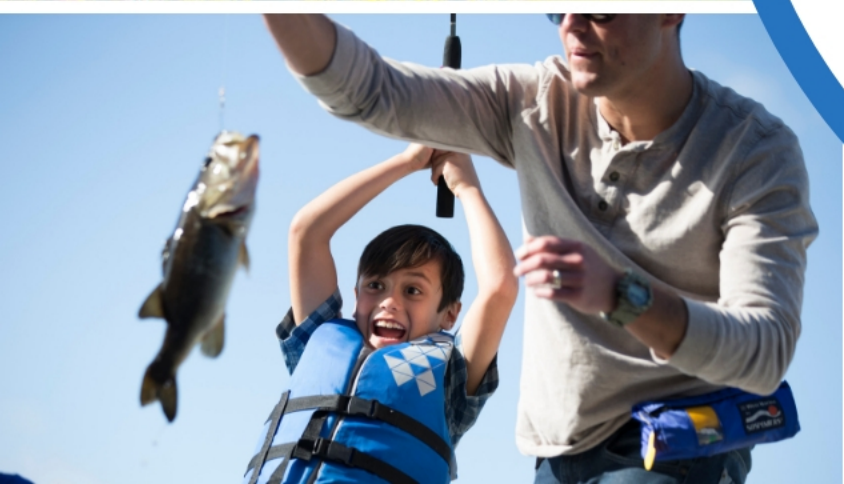
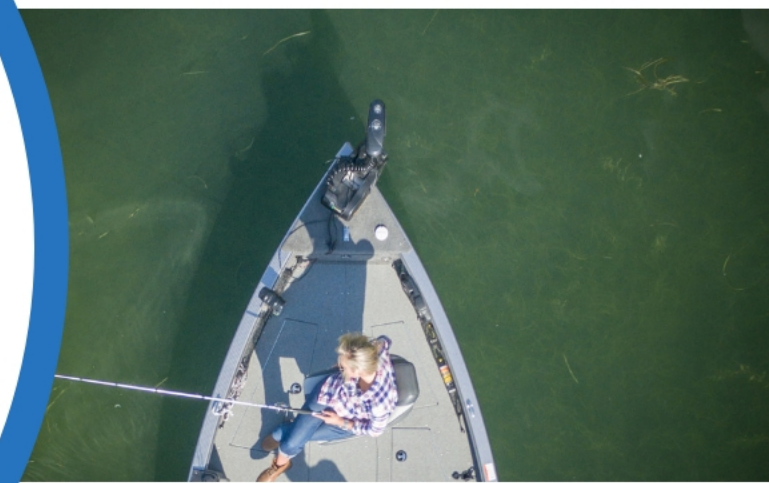




RECREATIONAL
BOATING & FISHING
FOUNDATION



RBFF Conservation Study Report



APRIL
2019



Contents

INTRO

Pages 2-15

- + Background
- + Objectives
- + Methodology
- + Respondent Criteria
- + Executive Summary
- + Understanding Max Diff

01

RBFF
Detailed
Findings

Pages 16-32

- + Licensing
- + Conservation
- + Message Prioritization
- + Demographics

02

Regional
Findings

Pages 33-44

- + Regional analyses

03

Appendices

Pages 45-51

- RBFF
 - + Segments
 - + Beginner/Avid
 - + Hispanic

Map of regions

Background

The RBFF board represent a diverse set of organizations and constituencies including state departments of natural resources, manufacturers, media, and conservation organizations. Within this community of stakeholders, there's a strong belief that fishing enthusiasts are some of the most ardent supporters of conservation, and that in order to drive growth in license sales, it's critical to build awareness among anglers of the linkage between licenses and conservation. This approach doesn't necessarily reflect extant data on the subject, and such a strategy is subject to perennial debate.

Previous research indicates that respondents buy licenses because "it's the right thing to do." The contribution to conversation enabled by these license purchases helps to reinforce the initial purchase decision, but alone does not serve as a primary impetus. In other words, people are buying licenses because they want to get outdoors—learning that money is going back into local conservation efforts is a feel-good bonus.

Research conducted in 2015 examined the linkage between conservation and license purchase in detail. This 2019 study serves as a follow up to the 2015 study, to see how opinions and attitudes have changed, if at all.

This in-depth follow up study will provide us with the necessary information to confidently move forward with clear direction for the brand and its communication strategies.

Objectives

01

Measure current awareness of the connection between licenses and local conservation.

- How many respondents know where license proceeds are going?
- How does this change among our target audiences?
- How do our target audiences compare to both general population and avid segment?

02

Develop a better understanding of the relative importance of conservation messaging to our primary target audiences.

- To what degree is this group motivated by this message?
- How does that motivation vary among our target audiences?
- How does that motivation compare to both the general population and avid segment?

03

Ascertain to what degree being motivated by conservation correlates with actual license purchase.

04

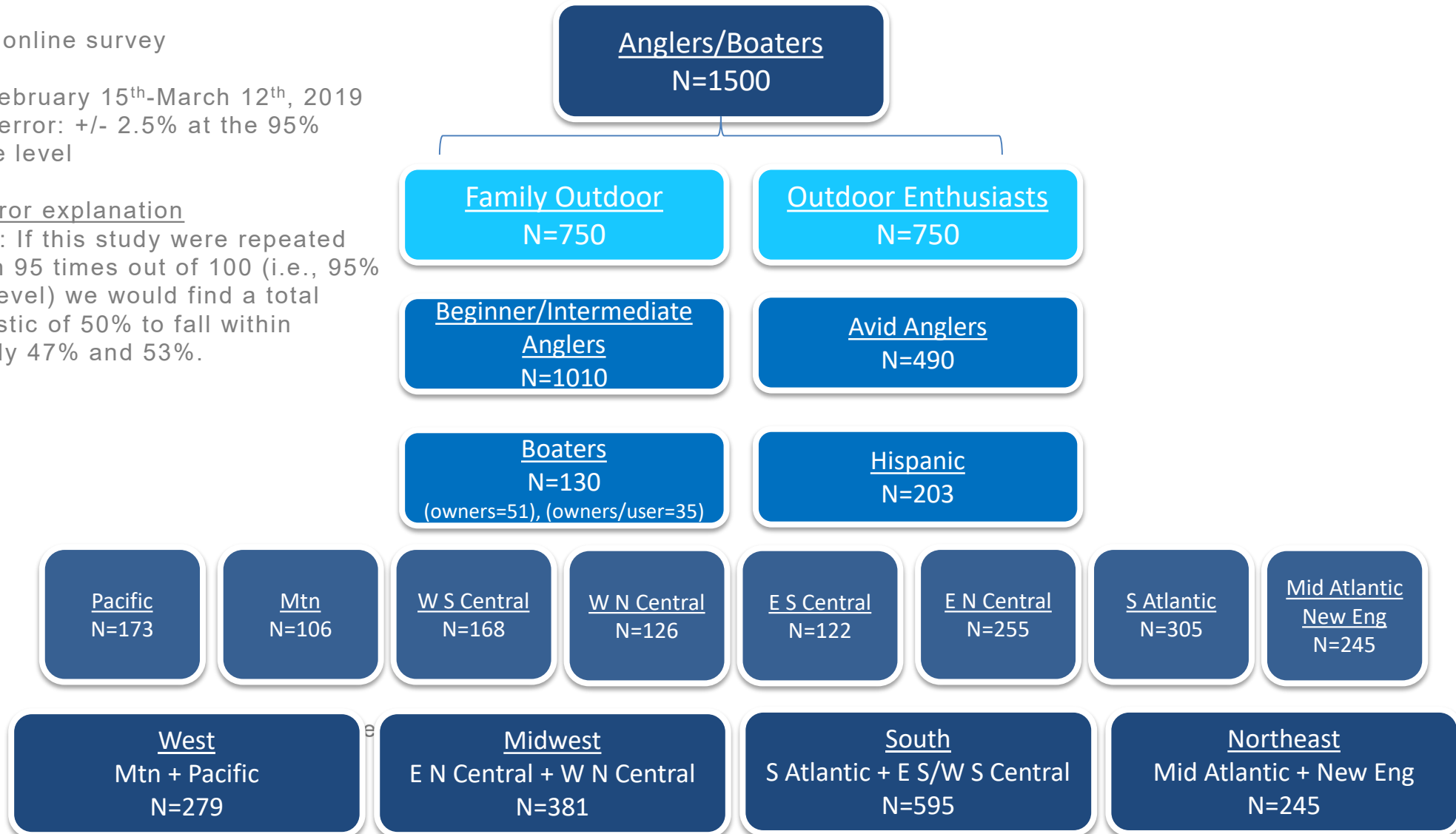
Gain insight into what type of conservation messages are most relevant and motivating to our audience, and where they would be most receptive to these messages.

Methodology & Structure

- 15 minute online survey
- N=1500
- Fielded: February 15th-March 12th, 2019
- Margin of error: +/- 2.5% at the 95% confidence level

Margin of Error explanation

For example: If this study were repeated 100 times, in 95 times out of 100 (i.e., 95% confidence level) we would find a total sample statistic of 50% to fall within approximately 47% and 53%.



Respondent Criteria

Family Outdoors



- Aged 18 and up
- Have children under 18 in household
- Participate in outdoor activities more than once a year; activities must include fishing
- Participate in outdoor activities with children under 18
- Participate in outdoor activities to build relationships with my family

Outdoor Enthusiasts



- Aged 18 and up
- Participate in outdoor activities at least once a month; activities must include fishing
- Participate in outdoor activities with spouse/significant other, family members (such as parents, siblings, but not own children), friends, or alone
- Participate in outdoor activities to build expertise in sport/activity AND/OR Enjoy outdoor activities for the experience/excitement AND/OR enjoy outdoor activities to 'get away' or escape

Respondent Criteria, cont'd.



Criteria Amongst Anglers:

- **Beginning/Intermediate Anglers**
 - Either Family Outdoors or Outdoor Enthusiasts
 - Fish 1-9x/yr.
- **Avid Anglers**
 - Outdoor Enthusiast
 - Fish 10+x/year
 - Own fishing equipment and regularly use it when I fish.
- **Boaters**
 - A subset of Beginning/Intermediate Anglers or Avid Anglers (non-exclusive definition in terms of sample)
 - Participates in boating
 - Currently owns a boat and fishes from a boat (canoe, kayak, rowboat, electric motor, etc.)

Due to fielding time during off-peak boating months, a low sample size of those who own/have owned a boat was obtained (n=51) and of these, only n=35 use their boat for fishing. Low income levels were also seen from respondents which could also impact the high number of non-boaters. All data in tables should be used directionally only.

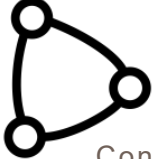

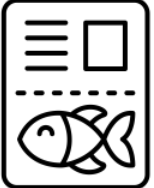

- **Hispanics**
 - A subset of family Outdoors, non-exclusive definition in terms of sample

Aware funds go towards conservation (T2B)

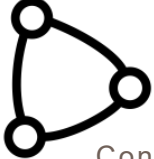

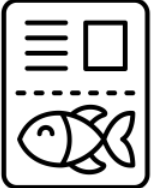

Consistent metric since 2015, across all audiences

Aware funds go towards conservation (T2B)	2018 (A)	2015 (B)
Total	76%	75%
Family Outdoor	74%	71%
Outdoor Enthusiast	78%	79%
Beginner Angler	73%	71%
Avid Angler	82%	85%
Hispanic	71%	73%
Male	79%	80%
Female	73%	72%

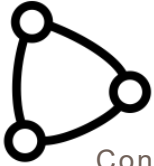

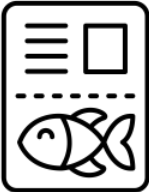
Executive Summary: Overall

<p>License</p>  <p>Conservation</p>	<p>When first asked on a top of mind (unaided) basis where their license fees go towards, respondents mention 'conservation' as the top mention. And, three-quarters of all respondents are aware of the connection between licensing and conservation on an aided basis.</p>
	<p>While nearly all (over 9 out of 10) like the idea that they are funding conservation with their licensing fees, it is not the main driver why they fish. Only 15% say they fish because it is a good way to promote conservation. Most fish because they enjoy the outdoors and the time they spend with family.</p>
	<p>Most are aware they need a license to fish (86%) and also have purchased one in the past (85%). Eight in ten respondents claim they purchased a license because it is a required rule. Many also claim to purchase one because it is the right thing to do. Conservation is not a main driver of licensing purchase—only 40% say this is the reason for their purchase.</p>
	<p>Through a Max Diff prioritization of messaging (see slide 12 for more details) anglers prefer the detailed conservation messaging of (in order of preference):</p> <ul style="list-style-type: none">• 100% of your license fees are invested back into local conservation, ensuring healthy fish/wildlife populations and public access to fishing opportunities in your state.• 100% of your license fees are invested back into conservation, ensuring healthy fish/wildlife populations and public access to fishing opportunities.• <i>Same top 2 messages from 2015</i>

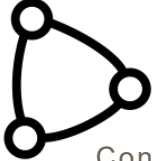

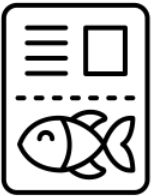

Executive Summary: By Segment

<p>License</p>  <p>Conservation</p>	<p>While the majority of anglers correctly understand that their license fees go towards conservation, Avid Anglers are significantly more likely to know this (82% of Avid Anglers vs. 76% of all anglers).</p>
	<p>While nearly all like the idea that they are funding conservation with their licensing fees, it is not the main driver for why they fish <u>or</u> participate in outdoor activities. They are participating because they enjoy the outdoors and the time they spend with their family. Avid Anglers are significantly more likely to say they are passionate about conservation and protecting and preserving the waterways.</p>
	<p>The majority of anglers know you need a license to fish and have purchased one in the past. However, Outdoor Enthusiasts and Avid Anglers are significantly more likely to have purchased a license. In terms of why they purchase licenses, most claim they purchased a license because it is a required law. However, Avid Anglers and Outdoor Enthusiasts are significantly more likely to say because they want to support a sport they are passionate about, as well as because the fees go towards conservation.</p>
	<p>When asked the reasons why they fish, Family Outdoors are significantly more likely to fish for “family reasons” (spending time with family, family traditions), while Outdoor Enthusiasts are significantly more likely to fish for reasons other than family (enjoy solitude, catch own food). Avid Anglers are significantly more likely to say they fish for various reasons more than Beginner/Intermediate Anglers.</p>

Executive Summary: By Region

<p>License</p>  <p>Conservation</p>	<p>As seen with earlier findings, most respondents are aware that their licensing fees go towards conservation. The Midwest is significantly more aware of the connection over all other regions, on both an unaided (top of mind) and aided basis.</p>
	<p>Nearly all respondents like the idea that they are funding conservation with their licensing fees. This is particularly true of the Midwest region, with the highest score of 94%.</p>
	<p>Those in the Midwest are significantly more likely to be aware that a license is needed to fish than all other regions—and the Midwest is the highest region where respondents have purchased one in the past. When asked why they purchased their license, the Northeast has the lowest score over other regions for “the rules/regulations require it” and “it is the right thing to do.” Conservation is not a main driver of licensing purchase, and there are no regional differences for ‘all fishing license fees are invested back into conservation.’—it is the same for all regions (roughly 40%).</p>

Executive Summary: Implications

<p>License</p>  <p>Conservation</p>	<p>Those more experienced-and committed- to fishing have a greater investment and desire to conserve, and have a deeper knowledge of conservation. RBFF has the opportunity to increase awareness of this connection by targeting beginner/intermediate anglers. Additionally, the brand could utilize the more experienced anglers as ambassadors for the brand.</p>
	<p>Although it is important, conservation is not a top reason why people participate in fishing. Enjoyment of the outdoors—and spending time with their family—are the main drivers. Executing communication tactics that connect conservation with ‘outdoor time’ and ‘family time’ can forge an emotional link between something they care about (conservation) and something they love (being outside, fishing with family).</p>
	<p>Another consistent finding is that a majority of respondents know they need a license to fish, but that conservation is not a main driver of purchase. Again, it will be necessary for anglers to fully understand the end benefit of conservation in order to elevate that as a main driver of license behavior. Specialized executions about licensing would be beneficial for the different segments – as there are such differences to participation among the Outdoor Enthusiasts vs. Family Outdoors and Beginners vs. Avid Anglers.</p>
	<p>Conservation messaging that outlined how much and where the licensing fees were being used were the most relevant messaging tested. While two similar messages were the top messages tested, respondents preferred the one that felt more personal: talking about ‘local conservation’ and ‘in your state.’ These messages can help build on the connection between licensing and conservation – especially when they see these efforts as personal to them and actionable to where they live.</p>

Key Metrics Comparison

Consistent metrics since 2015, although some decreases in licensing behavior

Key Metric	2018 (A)	2015 (B)
Aware need license to fish	86%	91%A
Purchased license	85%	94%A
Purchased license at sporting/retail store	81%	79%
Purchase license: it's the right thing to do	79%	83%A
Aware funds go towards conservation (T2B)	76%	75%
Like that fees go towards conservation (T2B)	91%	93%A
Top messages (Max Diff)	<ul style="list-style-type: none"> 100% of your license fees are invested back to state wildlife agencies to ensure healthy fish/wildlife populations and public access to fishing/hunting/shooting opportunities in your state 100% of your license fees are invested back into conservation, ensuring healthy fish/wildlife populations and public access to fishing/hunting/shooting opportunities 	<ul style="list-style-type: none"> 100% of your license fees are invested back to state wildlife agencies to ensure healthy fish/wildlife populations and public access to fishing/hunting/shooting opportunities in your state 100% of your license fees are invested back into conservation, ensuring healthy fish/wildlife populations and public access to fishing/hunting/shooting opportunities

Key Audience Comparison

Consistent metrics since 2015, although some shifts in income/boating

Key Metric	2018 (A)	2015 (B)
Total sample size	N=1500	N=750
Family Outdoor	50%	50%
Outdoor Enthusiast	50%	50%
Beginner	67%	70%
Avid	33%	30%
Boaters	5%	24%A
Hispanic	14%B	8%
Male	50%	58%A
Female	50%B	42%
HH Income under \$75K	67%B	47%
Northeast	19%	16%
Midwest	25	26
South	40	39
West	16	19

Understanding Max Diff

MaxDiff is an approach for obtaining preference/importance scores for multiple items (brand preferences, brand images, product features, advertising claims, or in this case membership benefits) using marketing or social survey research.

With MaxDiff, respondents are shown a set (subset) of the possible benefits in the study, and are asked to indicate the benefit they value the most and the benefit they value the least.

MaxDiff scoring uses a sophisticated estimation technique to compute scores for each respondent on each benefit. Hierarchical Bayes (HB) is the statistical technique used.

This test utilized n=1500 for all respondents and tested 10 different messages. Respondents viewed three messages at a time over a total of ten screens.

Instead of using a 0 to 100 scale, the MaxDiff data has been transformed into scores on a scale that may be stated as:

$$\text{Index Score} = (0 \text{ to } 100) \times N$$

N = the number of items tested

With this method, scores above 100 are always above average and scores below 100 are always below average.

Indexed scores greater than or equal to 100 represent a benefit that tested at average to exceptional levels. Scores performing under 100 represent benefits that were lower performing.

- *An index of 100 is an average performing benefit*
- *A score above 100 is accepted as better than average performance*
- *A score of 99 or lower is below average*

01-RBFF DETAILED FINDINGS

- + Licensing
- + Conservation
- + Message Prioritization

Most are aware they need a license to fish (86%) and also have purchased one in the past (85%).

Fishing License Awareness, Ownership and Purchase Location



86% are aware that they need a license to fish



85% purchased a fishing license in the past

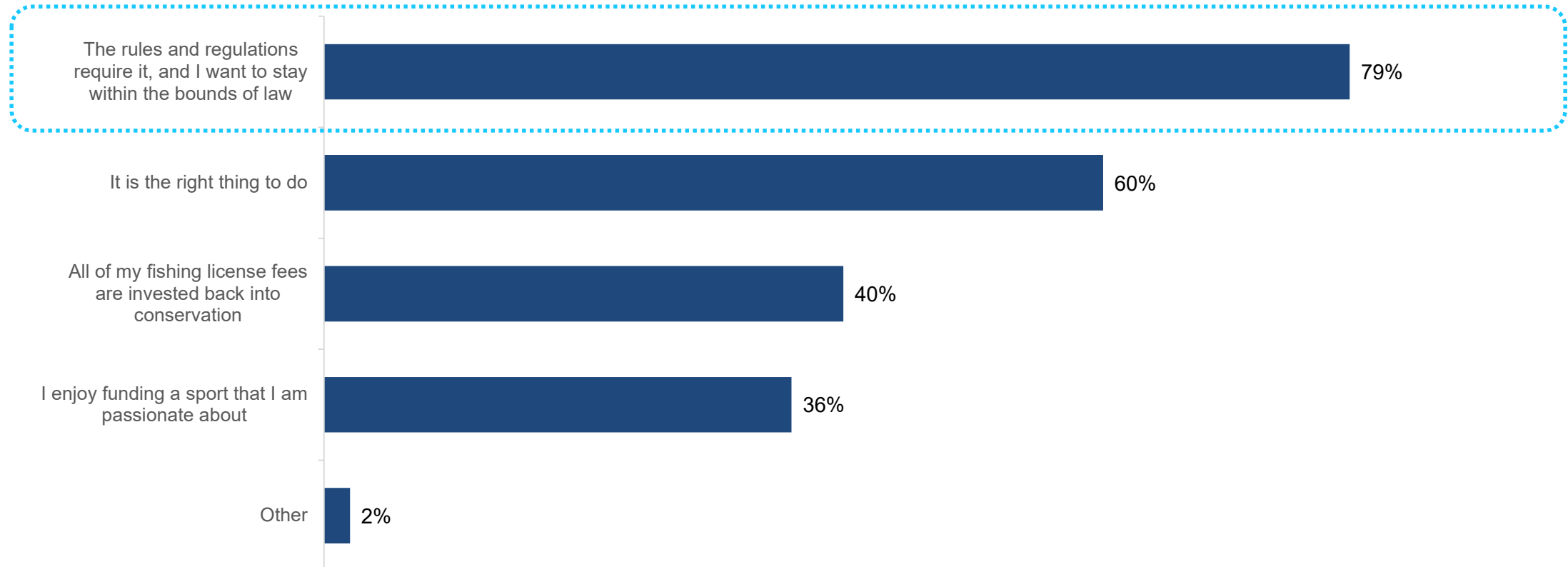


Where purchased?

- Sporting/retail store: 81%
- Online: 18%
- Toll free number: 2%
- Other: 4%

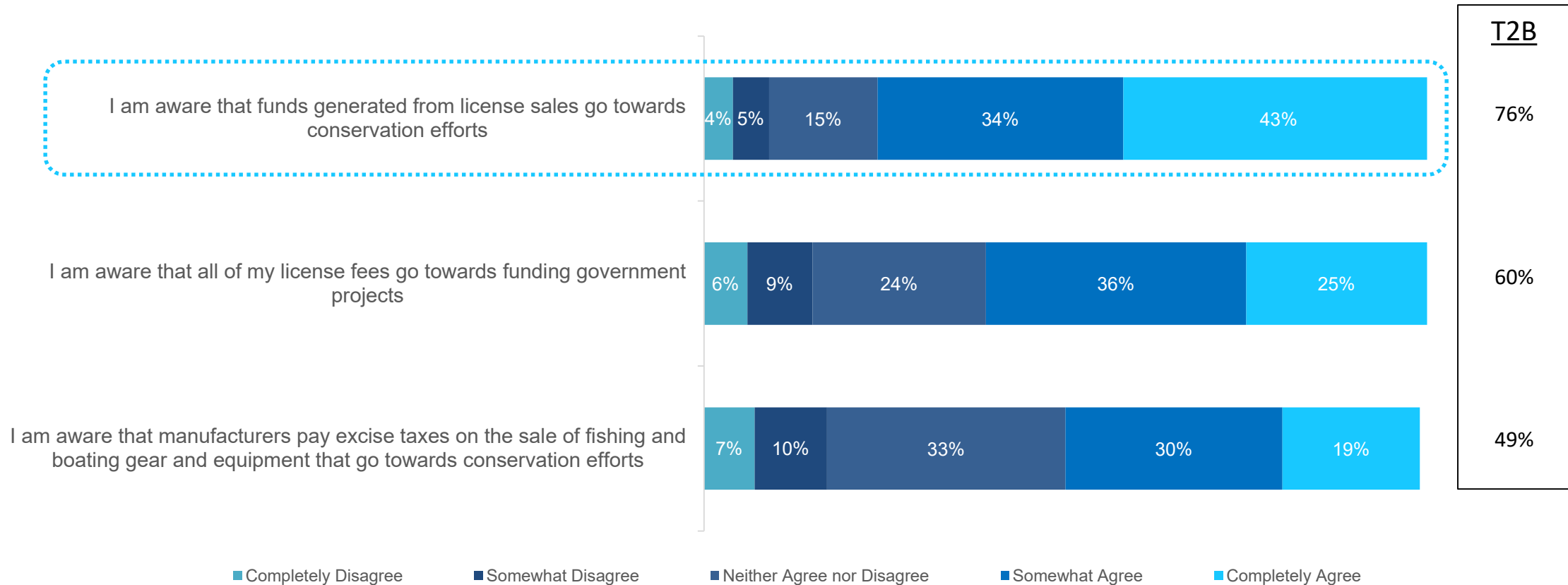
Roughly eight in ten purchase a license because they have to, but many also claim they do it because it is the right thing to do.

Reasons Purchased Fishing License



When asked directly, three-quarters agree that license funds go towards conservation efforts.

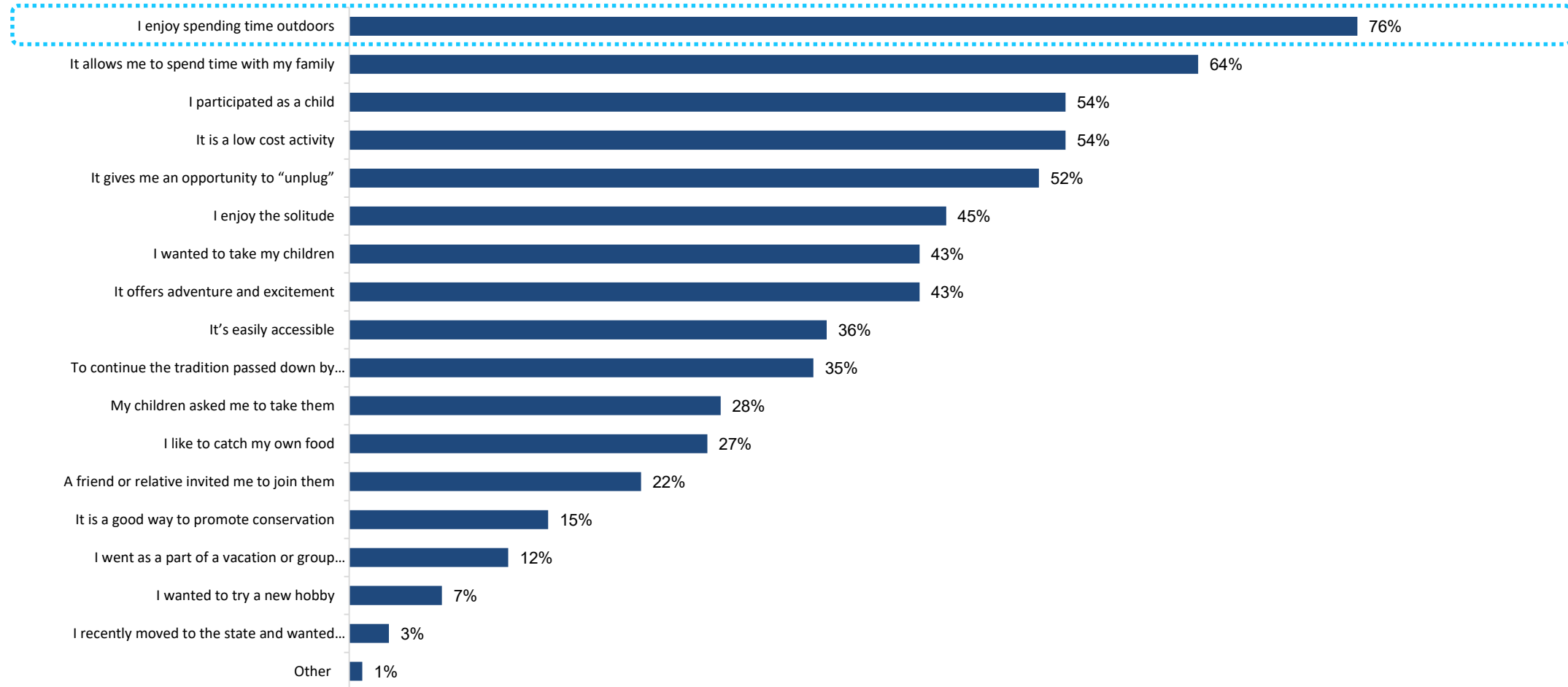
Agreement Statements



Q6. Before you go fishing,, you do need a license. Please indicate how much you agree or disagree with each statement.
 Base=Total Respondents: (n=1,500)

While conservation is mentioned, it is not a main driver for why people fish. They fish to appreciate the outdoors and spend time with family.

Reasons to Fish



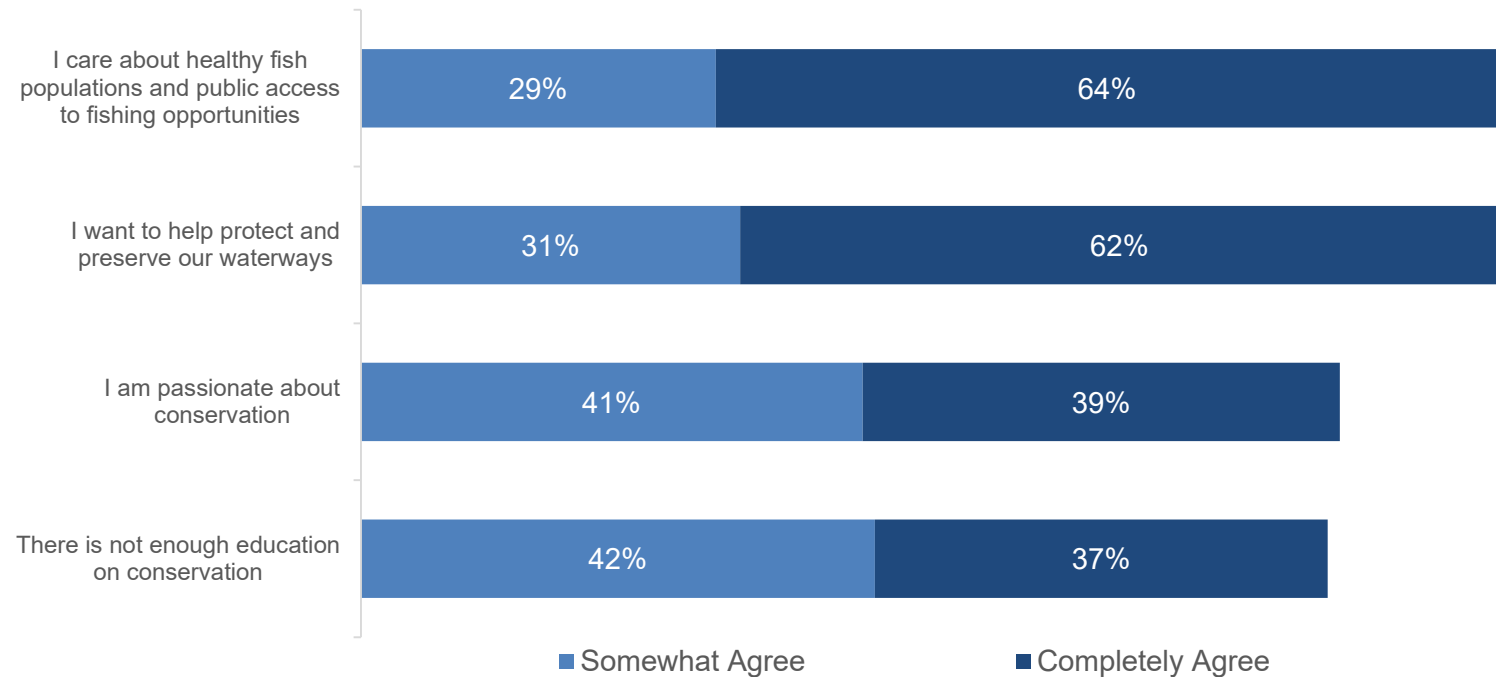
Nearly all care about healthy fish populations and like that their fees goes towards conservation efforts.

Fishing License Agreement Statements (T2B scores)



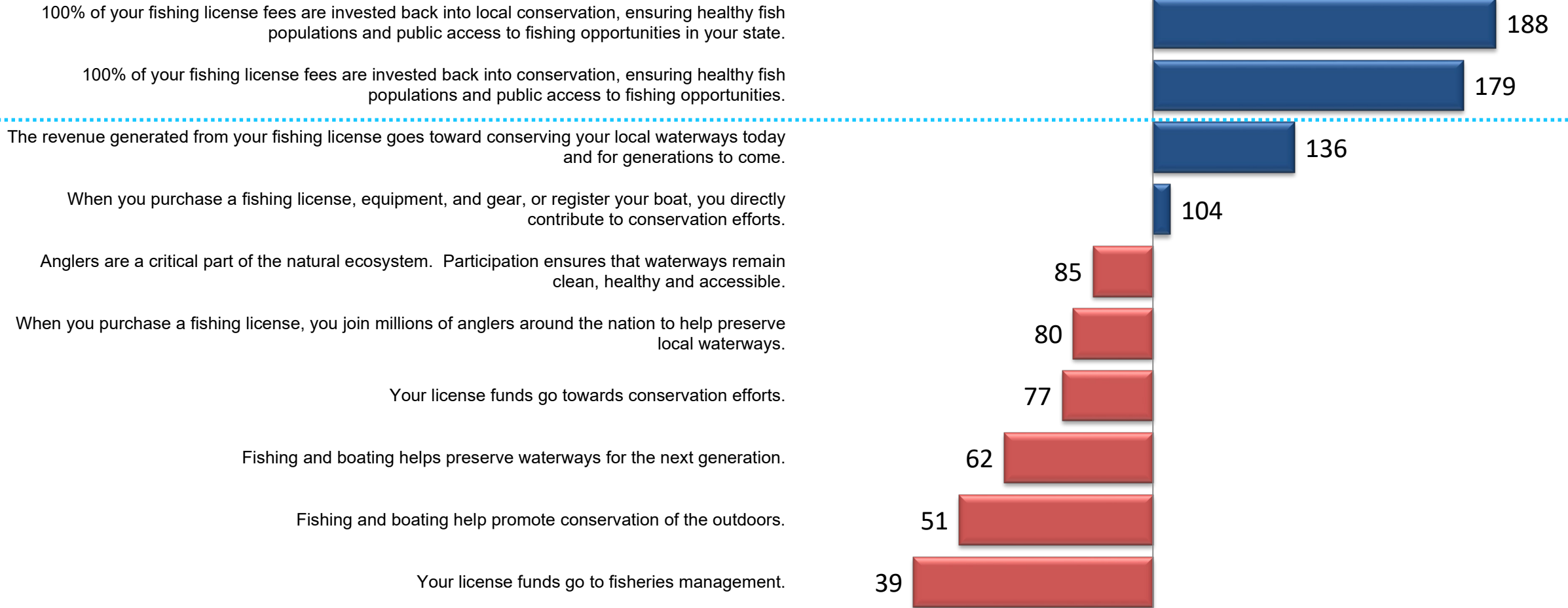
91% like that all their licensing fees go towards conservation

*Similar score in 2015 (93%)



The highest priority conservation messages detail out that 100% of licensing fees are invested back into ensuring healthy fish populations.

Max Diff Index Scores

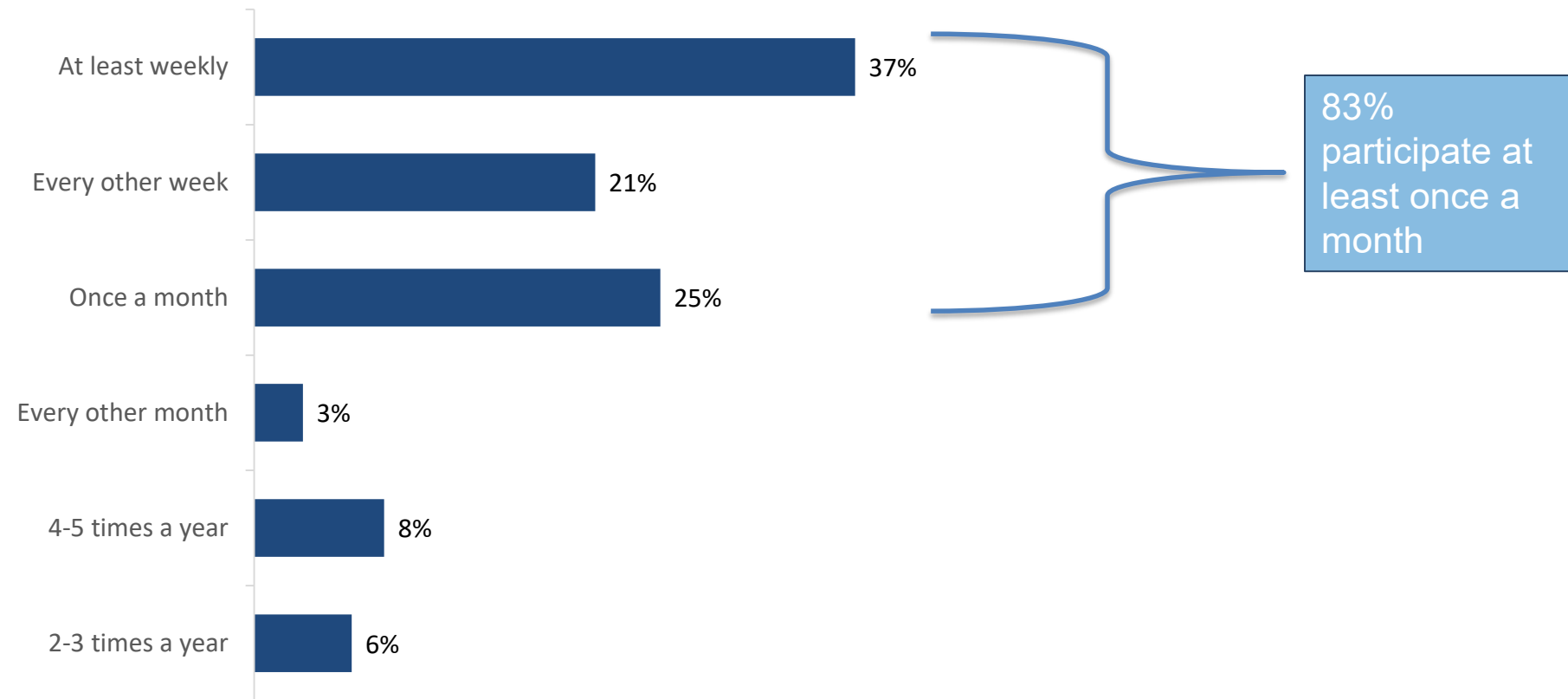


01-RBFF DETAILED FINDINGS

+ Demographics

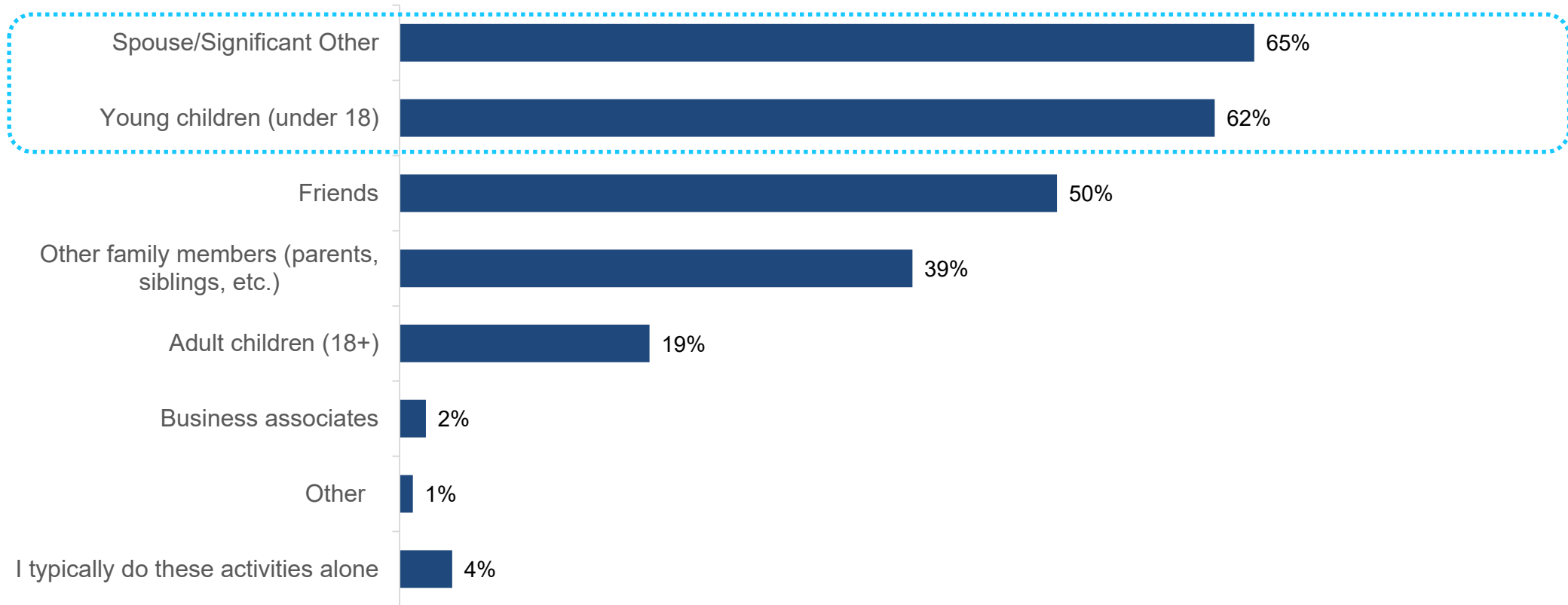
The majority of respondents participate in outdoor activities at least once a month.

Frequency of Participating in Outdoor Activities



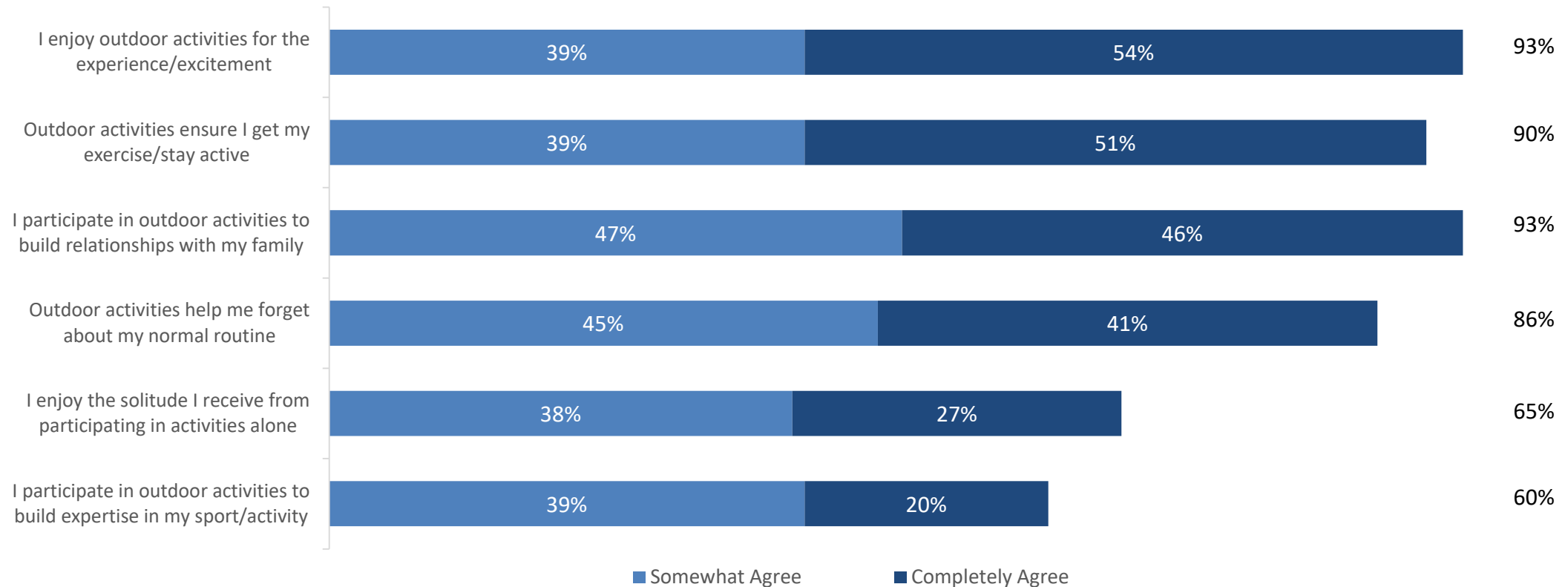
Most participate in outdoor activities with either a spouse/significant other, their young children or their friends.

Who Outdoor Activities Are Participated With



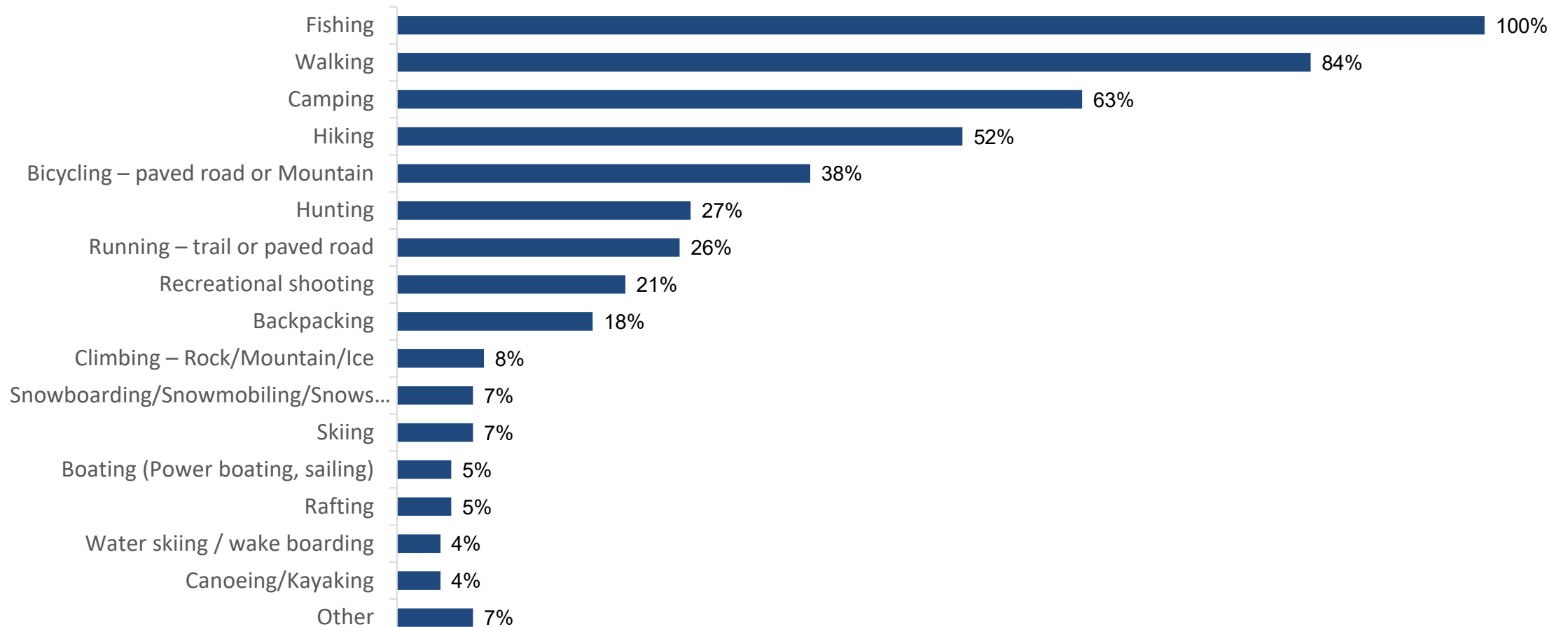
Respondents mostly enjoy outdoor activities for the experience of it and it enabling relationship building with family. It also ensures exercise.

Agreement Statements T2B Scores (Somewhat/Completely Agree)



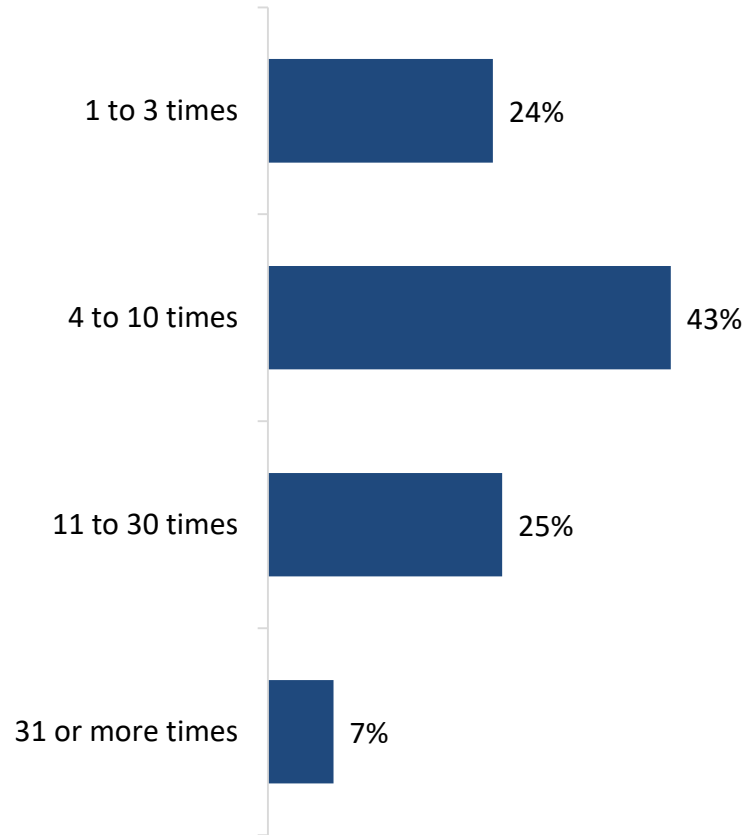
Other than fishing, respondents frequent walking, camping and hiking activities the most.

Which Outdoor Activities Respondents Participate In

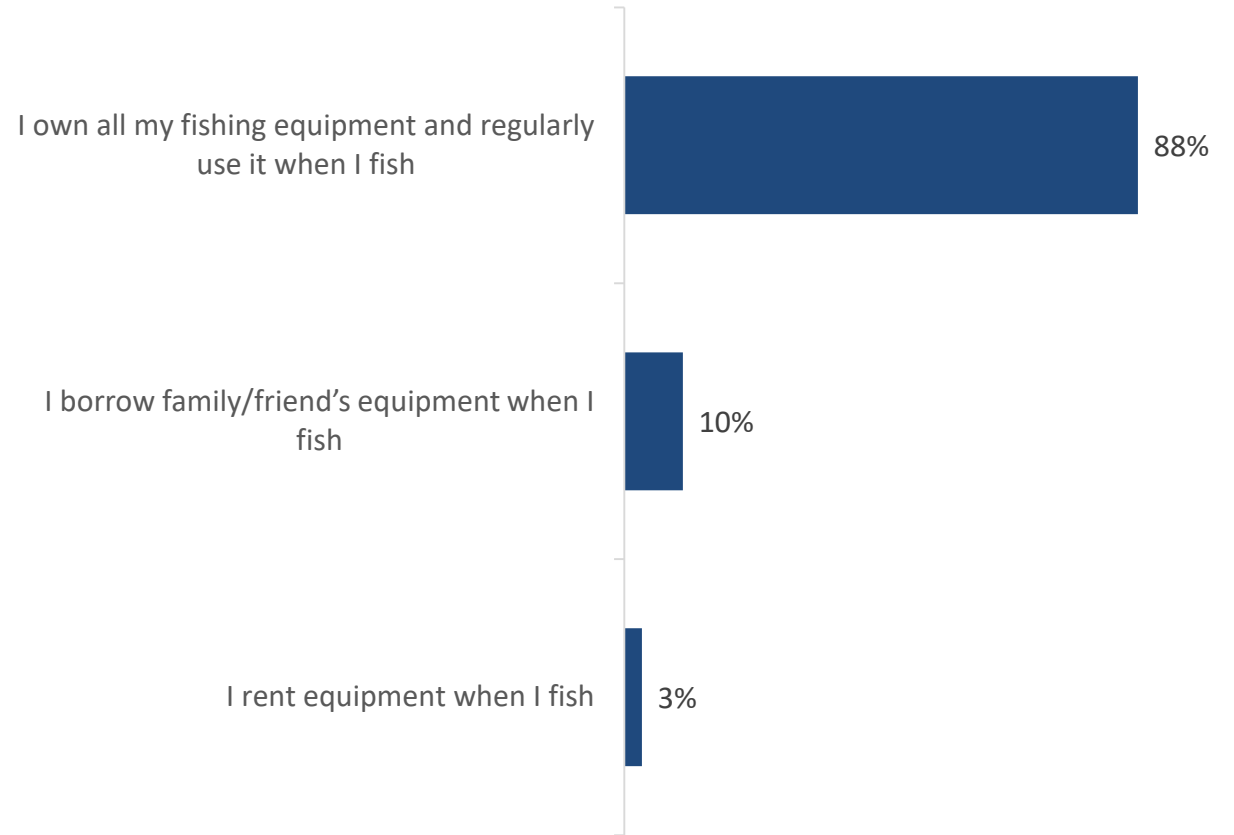


Roughly one-third fish more than 10 times a year, but most typically fish four to ten times per year, using their own equipment.

Fishing Frequency



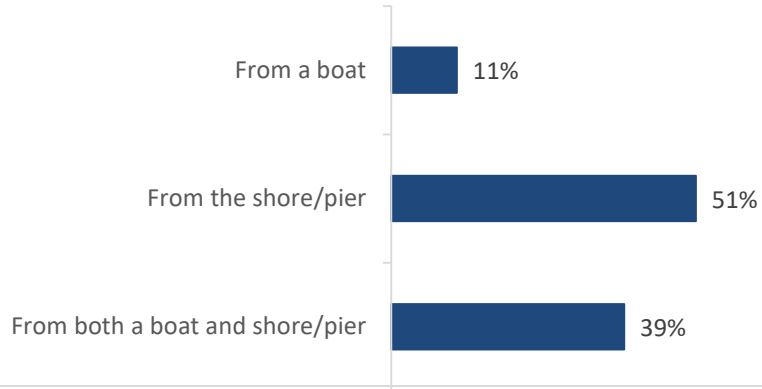
Fishing Equipment Used



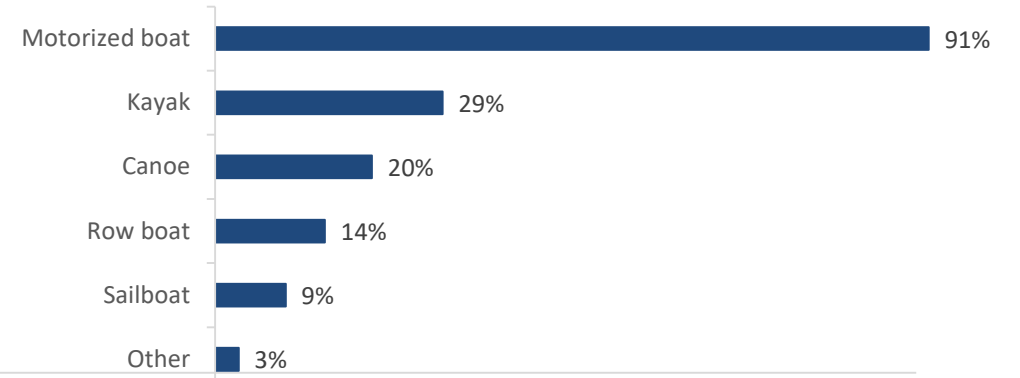
QS15. How many times do you fish in a typical year?
QS16. Which of the following best describes the equipment you use when fishing?
Base=Total Respondents (n=1,500)

About half of respondents own their own boat—most likely a motorized boat—and use it to fish.

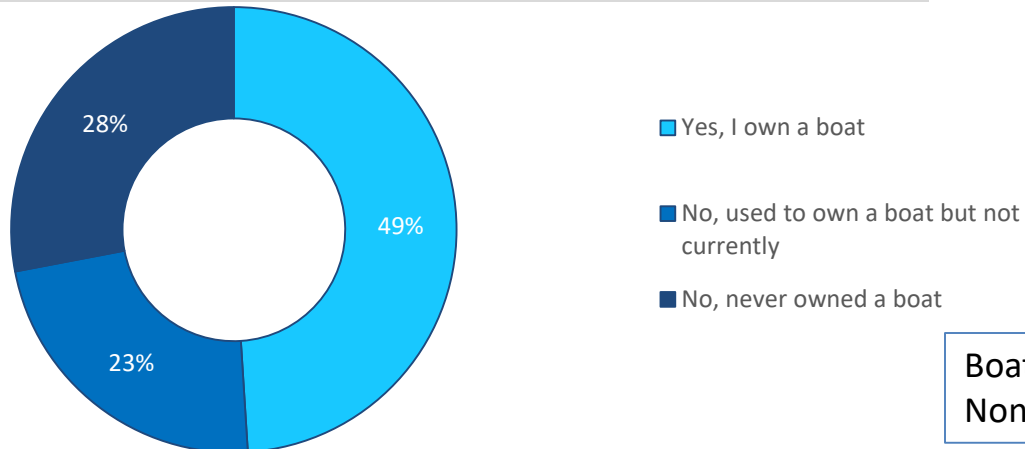
Ways Respondents Fish



Types of Boats Owned

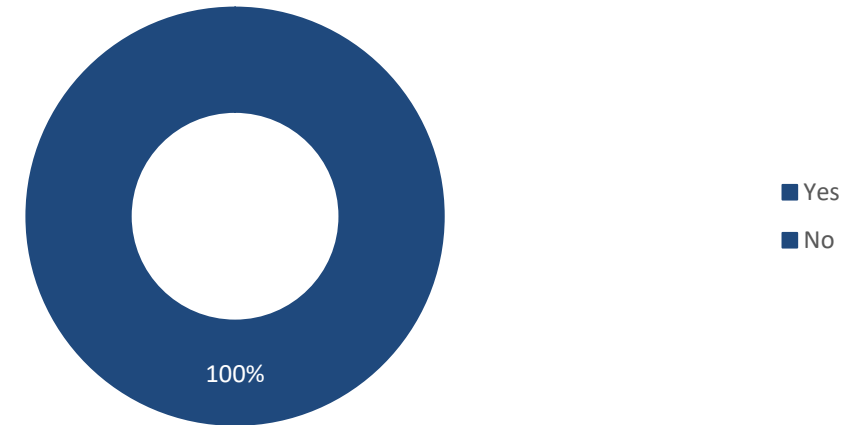


Current Boat Ownership



Boater: 5%
Non-Boater: 95%

Is Boat Used to Fish?



Demographics

GENDER



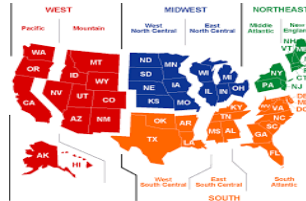
50% 50%

AGE



18-34: 34%
 35-44: 28%
 45-54: 18%
 55-64: 13%
 65+: 7%

REGION



Mountain: 7%
 Pacific: 12%
 South Atlantic: 20%
 East North Central: 17%
 West North Central: 8%
 East South Central: 8%
 West South Central: 11%
 Middle Atlantic + New England: 16%

HH INCOME



<\$30K: 23%
 \$30K-\$49,999: 22%
 \$50K-\$74,999: 22%
 \$75K-\$99,999: 14%
 \$100K-\$124,999: 7%
 \$125K+: 8%
 Prefer not to answer: 3%

EMPLOYMENT



Full-Time: 49%
 Part-Time: 13%
 Temporarily Unemployed: 3%
 Student: 2%
 Homemaker: 13%
 Retired: 12%
 Not employed: 6%

HISPANIC



Yes: 14%
 No: 86%

RACE



Caucasian: 80%
 African/Black: 9%
 Asian/Pacific Islander: 3%
 American Indian/
 Alaskan Native: 2%
 Other: 4%

KIDS UNDER 18



Yes: 65%
 No: 35%

MARITAL STATUS



Single: 19%
 Married: 58%
 Living w/sign. Other: 11%
 Divorced/Separated: 9%
 Widowed: 2%

EDUCATION



Some college or less: 57%
 College graduate: 30%
 Completed graduate school: 4%
 Post-graduate work: 7%
 Other: 1%

02-REGIONAL DETAILED FINDINGS

+ Regional Analyses

While the majority are aware a fishing license is required, the Midwest is significantly more likely to be aware than all other regions.

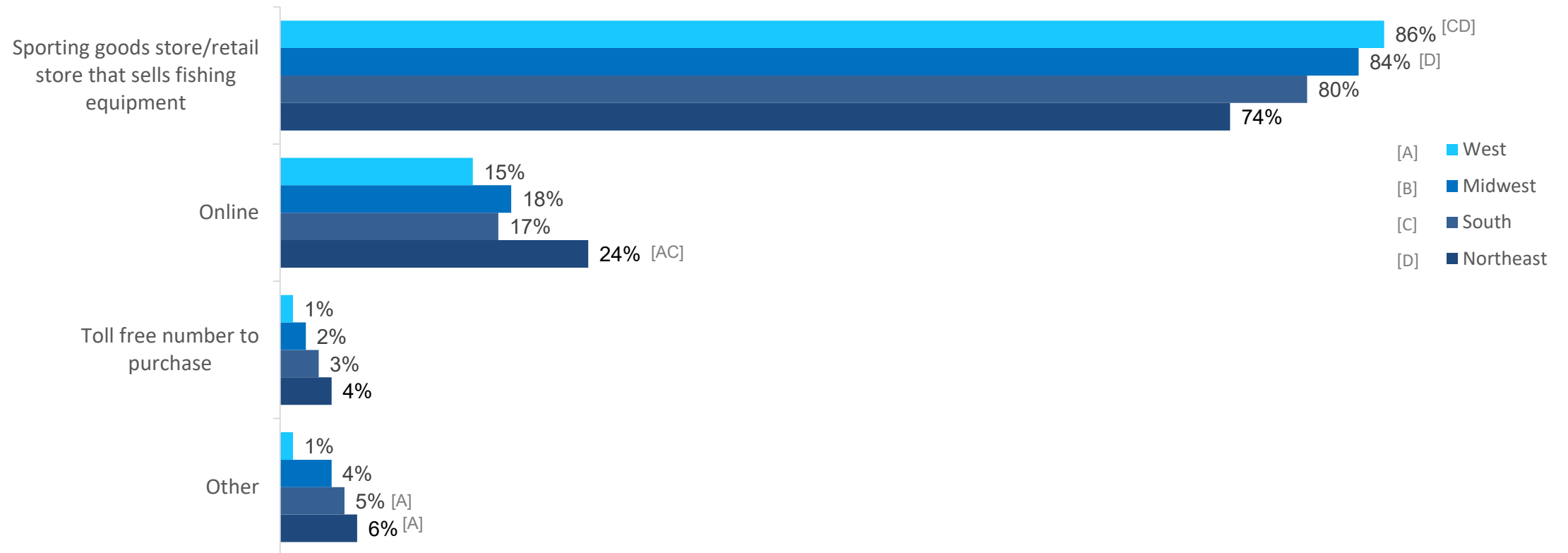
Is a License to Fish Required (% Yes)



Q2. Do you know if you need a license to fish?
Base=West (n=279), Midwest (n=381), South (n=595), Northeast (n=245)
NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

Most think to purchase their license at a sporting goods store or retail store; the Northeast is significantly lower for sporting goods store/retail store, compared to the other regions.

Location of Fishing License Purchase



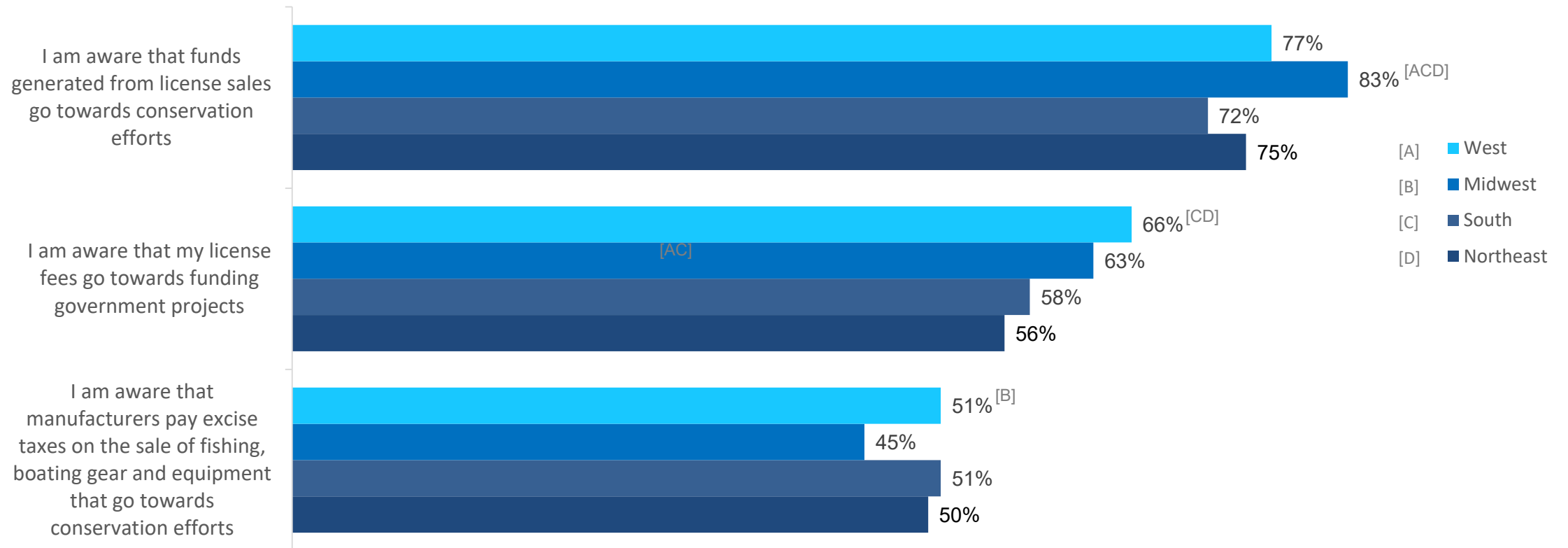
Q4. Where did you purchase your fishing license?

Base=West (n=279), Midwest (n=381), South (n=595), Northeast (n=245)

NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

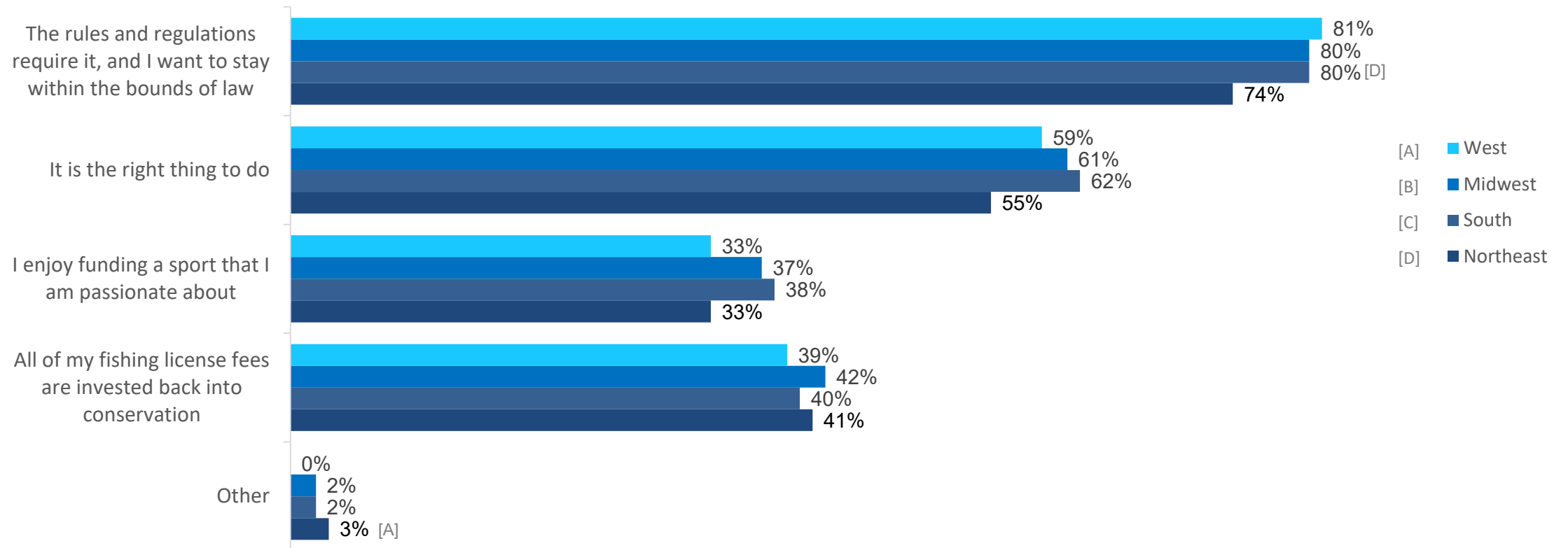
The majority are aware that license sales go toward conservation efforts, especially in the Midwest-significantly higher than all other regions.

Agreement Statements (T2B % Somewhat/Completely Agree)



Regardless of region, most feel similarly on why they purchase a license, with the Northeast being least likely to purchase a license because it is the law.

Reasons Purchased Fishing License



Q7. Which of the following are reasons why you have purchased/would purchase a fishing license?
 Base=West (n=279), Midwest (n=381), South (n=595), Northeast (n=245)
 NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

The majority of all respondents like knowing their license fees go towards conservation. No real differences seen regionally.

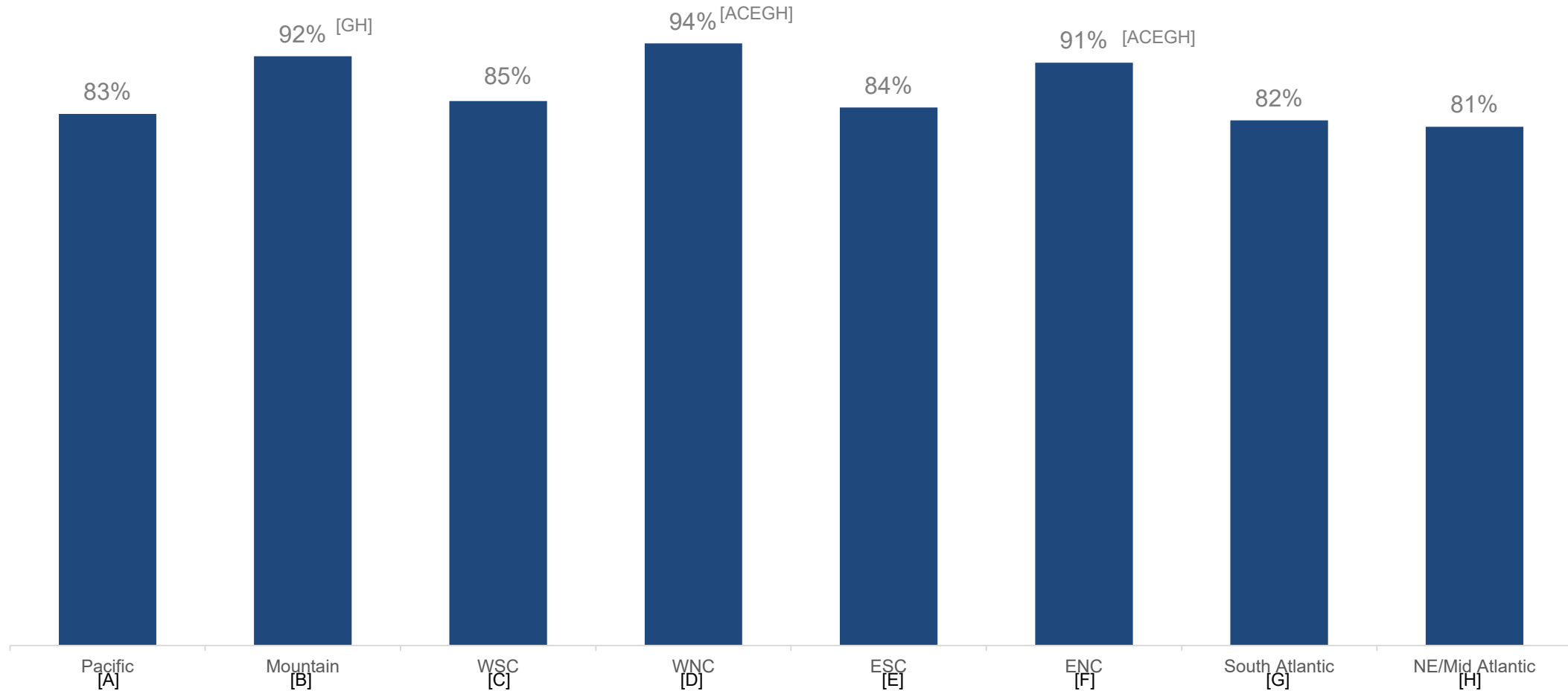
License Fees Go Towards Conservation (% “I Like it”)



Q9. When you purchase a fishing license, all the fees go towards conservation. Knowing this, how do you feel about these efforts?
Base=West (n=279), Midwest (n=381), South (n=595), Northeast (n=245)
NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

The West North Central and East North Central regions have significantly more awareness of a fishing license than the other regions.

Is a License to Fish Required? (% Yes)



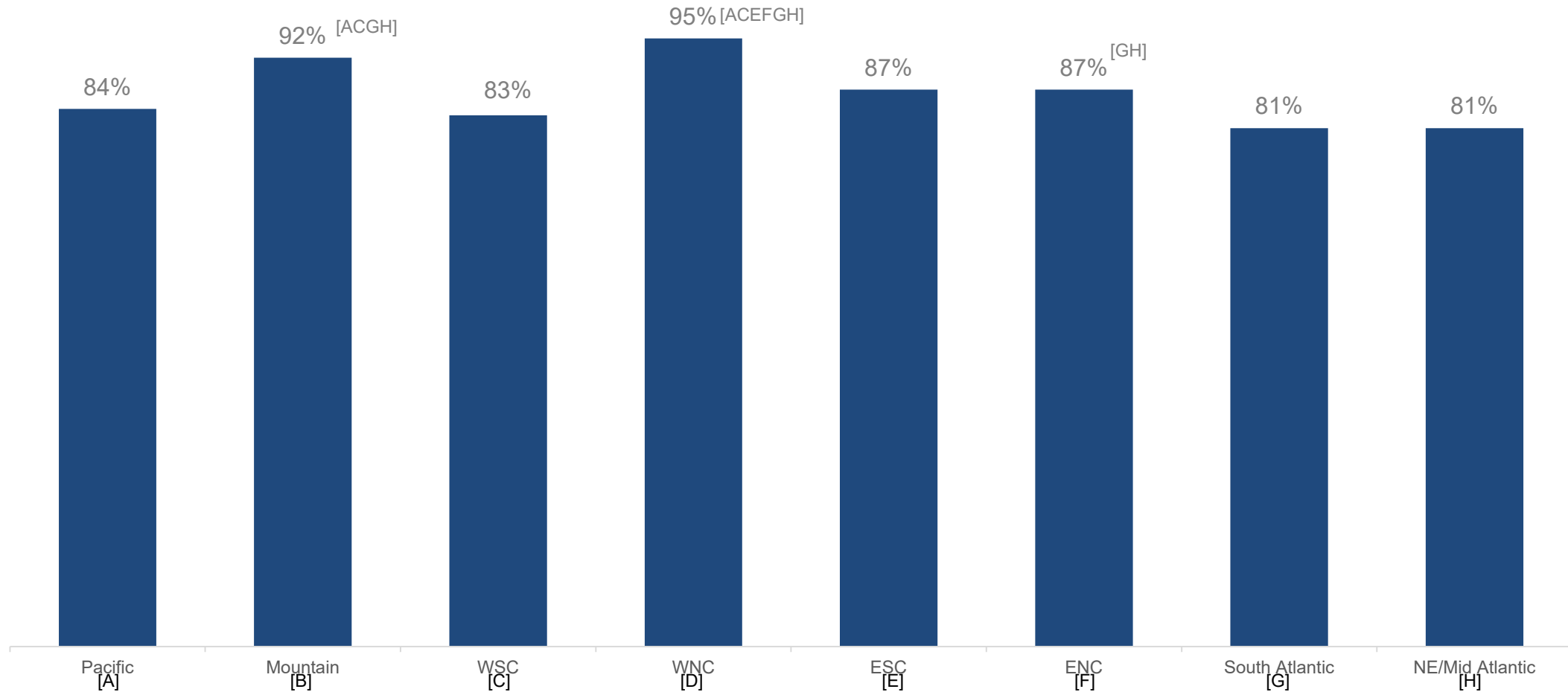
Q2. Do you know if you need a license to fish?

Base=: Pacific (n=173), Mountain (n=106), WSC (n=168), WNC (n=126), ESC (n=122), ENC (n=255), South Atlantic (n=305), NE/Mid Atlantic (n=245)

NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

The West North Central and Mountain regions have significantly more respondents that have purchased a fishing license.

Purchased a Fishing License in the Past (% Yes)



Q3. Have you purchased a fishing license in the past?

Base=: Pacific (n=173), Mountain (n=106), WSC (n=168), WNC (n=126), ESC (n=122), ENC (n=255), South Atlantic (n=305), NE/Mid Atlantic (n=245)

NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

Licenses are most commonly purchased at a sporting goods store/retail store; those located in the Mountain, Pacific and East North Central are significantly more likely to purchase there than other regions.

Location of Fishing License Purchase

Region	Pacific [A]	Mountain [B]	WSC [C]	WNC [D]	ESC [E]	ENC [F]	S Atlantic [G]	NE/Mid Atlantic [H]
Sporting goods store/retail store that sells fishing equipment	86% [DH]	88% [DGH]	83% [H]	76%	82%	88% [DGH]	78%	74%
Online	14%	16%	14%	20%	15%	17%	20%	24% [AC]
Toll free number to purchase	2%	-	1%	1%	3%	2%	3%	4% [B]
Other	1%	2%	6% [AF]	9% [ABF]	5% [AF]	1%	5% [AF]	6% [AF]

NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

Awareness levels of what license fees go towards are strong; the West North Central and Mountain regions have the highest T2B scores.

Agreement Statements (T2B: Somewhat/Completely Agree)

Region	Pacific [A]	Mountain [B]	WSC [C]	WNC [D]	ESC [E]	ENC [F]	S Atlantic [G]	NE/Mid Atlantic [H]
I am aware that all of my license fees go towards state fish and wildlife agencies	72%	85% [ACEGH]	72%	87% [ACEGH]	74%	82% [ACGH]	71%	75%
I am aware that my license fees go towards funding government projects	65%	68% [CH]	55%	65%	61%	62%	58%	56%
I am aware that manufacturers pay excise taxes on the sale of fishing and boating gear and equipment that go towards conservation efforts	51%	50%	49%	48%	52%	43%	52% [F]	50%

NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

The Mountain, West South Central and West North Central regions had stronger scores for rules/regulation being the reason they purchase a license.

Reasons Purchased a License

Region	Pacific [A]	Mountain [B]	WSC [C]	WNC [D]	ESC [E]	ENC [F]	S Atlantic [G]	NE/Mid Atlantic [H]
The rules and regulations require it, and I want to stay within the bounds of law	77%	86% [H]	86% [GH]	83% [H]	80%	79%	77%	74%
It is the right thing to do	61%	56%	60%	63%	62%	60%	63%	55%
I enjoy funding a sport that I am passionate about	34%	32%	38%	39%	44% [H]	36%	35%	33%
All of my fishing license fees are invested back into conservation	40%	37%	37%	44%	39%	41%	41%	41%
Other	-	1%	1%	2%	2%	2%	3% [A]	3% [A]

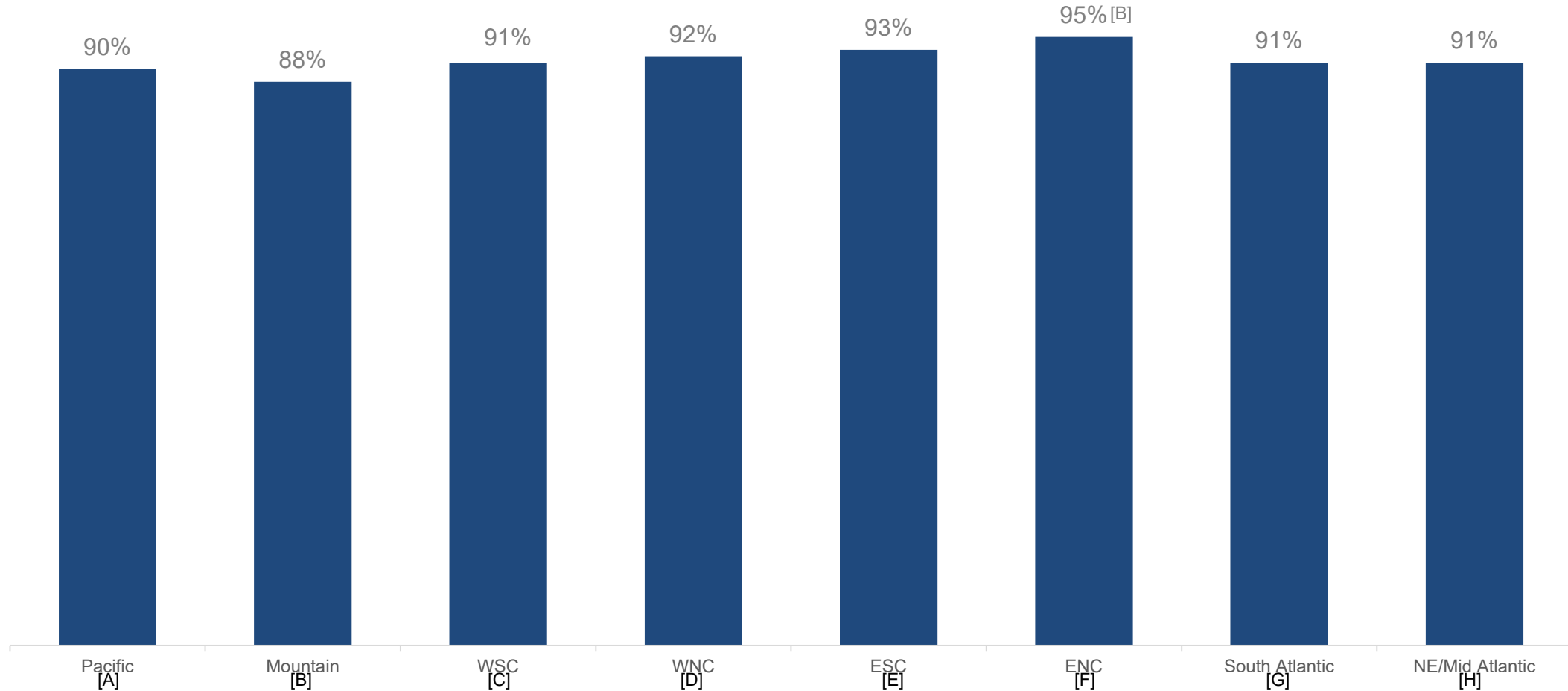
NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

Q7. Which of the following are reasons why you have purchased/would purchase a fishing license?

Base=: Pacific (n=173), Mountain (n=106), WSC (n=168), WNC (n=126), ESC (n=122), ENC (n=255), South Atlantic (n=305), NE/Mid Atlantic (n=245)

The majority of respondents like knowing their license fees go towards conservation; those located in the East North Central region are most likely to like this.

License Fees Go Towards Conservation (% “I Like it”)



Q9. When you purchase a fishing license, all the fees go towards conservation. Knowing this, how do you feel about these efforts?
Base=: Pacific (n=173), Mountain (n=106), WSC (n=168), WNC (n=126), ESC (n=122), ENC (n=255), South Atlantic (n=305), NE/Mid Atlantic (n=245)
NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

03-APPENDICES

- + Segments
- + Beginner vs. Avid
- + Hispanic

RBFF: Family Outdoors vs. Outdoor Enthusiasts

- 01 When asked the reasons why they fish, respondents categorized as Family Outdoors are significantly more likely to fish for “family reasons” than those categorized as Outdoor Enthusiasts: (i.e. to spend time with their family (76% vs. 53%), because their children asked them to (42% vs. 15%), to continue the tradition passed down by family members (39% vs. 31%), and I wanted to take my children (65% vs. 20%)); the opposite was true of Outdoor Enthusiasts: they are significantly more likely to fish for reasons other than family (i.e. easily accessible (39% vs. 33%), like to catch own food (31% vs. 24%), enjoy the solitude (54% vs. 37%.))
- 02 While the majority of Family Outdoors and Outdoor Enthusiasts know you need a license to fish and have purchased one in the past, Outdoor Enthusiasts are significantly more likely to have purchased a license (88% vs. 83%).
- 03 The majority of both Family Outdoors and Outdoor Enthusiasts both correctly understand that their license fees go towards conservation, but Outdoor Enthusiasts are significantly more likely to be aware of this than Family Outdoors:
 - awareness of manufacturers paying excise taxes on the sale of fishing/boating gear and equipment that go towards conservation efforts (53% vs. 45%).
- 04 While most purchase licenses because it is the law—and also because they say it is the right thing to do-- Outdoor Enthusiasts are significantly more likely to purchase a license to support a sport they are passionate about (39% vs. 33%) and because the fees go towards conservation (44% vs. 36%).
- 05 Both groups equally like knowing that their license funds go towards conservation as both care about healthy fish populations and want to protect and preserve their waterways.

RBFF: Family Outdoors vs. Outdoor Enthusiasts

06

Demographic Differences

There are significantly more female Family Outdoors and significantly more male Outdoor Enthusiasts (64% female/36% male Family Outdoors; 36% female/64% male Outdoor Enthusiasts).

Family Outdoors also have significantly more younger respondents, while the Outdoor Enthusiasts have significantly more older respondents: 71% of Family Outdoors are younger than 45 years of age (compared to 53% of Outdoor Enthusiasts); 47% of Outdoor Enthusiasts were 45 or older (compared to only 29% of Family Outdoors).

There are significantly more Family Outdoors in the South (44% vs. 35%) and significantly more Outdoor Enthusiasts in the Midwest (28% vs. 23%).

Family Outdoors are significantly more likely to be Hispanics (17% vs. 10%). Family Outdoors are significantly more likely to be married (65% vs. 51%), while Outdoor Enthusiasts are significantly more likely to be single (26% vs. 13%).

Family outdoors are significantly more likely to participate in camping and walking, while outdoor enthusiasts are significantly more likely to participate in boating, canoeing/kayaking and hunting.

Most respondents are employed; however, Outdoor Enthusiasts are significantly more likely to have retirees (19% vs. 5%) and less likely to have homemakers (7% vs. 19%).

There were no differences between Family Outdoors and Outdoor Enthusiasts among income and education.

RBFF: Beginner/Intermediate Anglers vs. Avid Anglers

01 Beginner/Intermediate Anglers are significantly more likely to say they fish because a friend/relative invited them (25% vs. 28%). Avid Anglers are significantly more likely to fish for many other reasons: for the excitement and adventure (56% vs. 37%), because it is easily accessible (46% vs. 31%), like to catch own food (39% vs. 22%), enjoyment of the solitude (57% vs. 40%), a good way to promote conservation (20% vs. 13%), having participated as a child (60% vs. 52%), continuing the tradition passed down by family members (43% vs. 31%), gives them an opportunity to “unplug” (63% vs. 47%), and spending time outdoors (88% vs. 70%).

02 While most know you need a license to fish, Avid Anglers are significantly more likely to say they know over Beginner/Intermediate Anglers (92% vs. 83%); Avid Anglers are also significantly more likely to have purchased a license (93% vs. 81%) in the past.

03 When asked where their license fees go, the most commonly given top of mind answer was conservation; however, Avid Anglers are significantly more likely to say this (36% vs. 27%). Beginner/Intermediates are significantly more likely to say they didn't know where the fees go (36% vs. 27%).
Avid Anglers are also significantly more likely to agree that their fees go towards conservation when directly asked:

- awareness that funds generated from license sales go towards conservation (82% vs. 73%)
- awareness of manufacturers paying excise taxes on the sale of fishing/boating gear and equipment that go towards conservation efforts (54% vs. 47%).

04 While most purchase licenses because it is the law and the right thing to do, Avid Anglers are significantly more likely to purchase a license for these reasons (66% because it is the right thing to do vs. 57% of Beginner/Intermediate Anglers, and 84% because it is the rules/regulation vs. 77% of Beginner/Intermediate Anglers). Avid Anglers are also significantly more likely to purchase a license to support a sport they are passionate about (47% vs. 31%) and because the fees go towards conservation (46% vs. 38%).

RBFF: Beginner/Intermediate Anglers vs. Avid Anglers

05 Both groups equally like knowing that their license funds go towards conservation as both care about healthy fish populations and want to protect and preserve their waterways. Avid Anglers are significantly more likely to say they are passionate about conservation (85% vs. 77%) and they want to help protect and preserve waterways (94% vs. 91%).

06 Demographic Differences
There are significantly more female Beginner/Intermediate Anglers and significantly more male Avid Anglers (53% female/47% male Beginner/Intermediate; 43% female/57% male Avid).

The Avid Anglers have significantly more older respondents: 10% of Avid Anglers are 65+ compared to only 6% of Beginner/Intermediate Anglers.

There are significantly more Beginner/Intermediates in the West (21% vs. 13%) and significantly more Avid Anglers in the South (46% vs. 37%).

Beginner/Intermediate Anglers are significantly more likely to have children under 18 years of age (69% vs. 56%) and are significantly more likely to participate in outdoor activities with these young children (66% vs. 53%). Avid Anglers are significantly more likely to participate in outdoor activities with friends (55% vs. 48%).

Avid Anglers participate in outdoor activities more often than Beginner/Intermediate Anglers, and also participate in more activities than Beginner/Intermediates. They are also significantly more likely own a boat (73% vs. 24%).

While most respondents work, Avid Anglers are also significantly more likely to have retirees (17% vs. 10%) and less likely to have homemakers (10% vs. 15%).

The vast majority of respondents were Caucasian, this is significantly more true of Avid Anglers (83% vs. 79%). Beginner/Intermediate Anglers are significantly more likely to be Hispanic (15% vs. 11%).

RBFF: Profile of Hispanics

- 01 When asked the reasons why they fish, respondents feel similarly regardless of ethnicity; the only difference was with the reason “I wanted to try a new hobby”: 15% of Hispanics cite this, significantly higher than the rest of the ethnic groups.
- 02 Overall, respondents know you need a license to fish, but this is slightly lower for Hispanics (76% know they need a license to fish vs. 90% of Caucasians; African-Americans were also low at 67%). Similarly, Hispanics are less likely to have purchased one in the past (74% Hispanics, vs. 89% Caucasians; African-Americans again were also low at 64%).
- 03 Hispanics, along with African Americans, are less likely to say they purchase a fishing license because “the rules and regulations require it”: only 68% of Hispanics (and 69% of African Americans) say this, vs. 83% of Caucasians.
- 04 Hispanics like knowing that their license funds go towards conservation as they care about healthy fish populations and want to protect and preserve their waterways; however, Hispanics were more likely to say they are passionate about conservation (85% vs. 79% Caucasian and 74% African American).
- 05 Demographic Differences
There are significantly more females that make up Hispanics (62% vs. 38%); They are also significantly more younger respondents –over half (53%) are between the ages of 18-34.

There are significantly more Hispanics in the West compared to other ethnic groups and less in the Midwest.

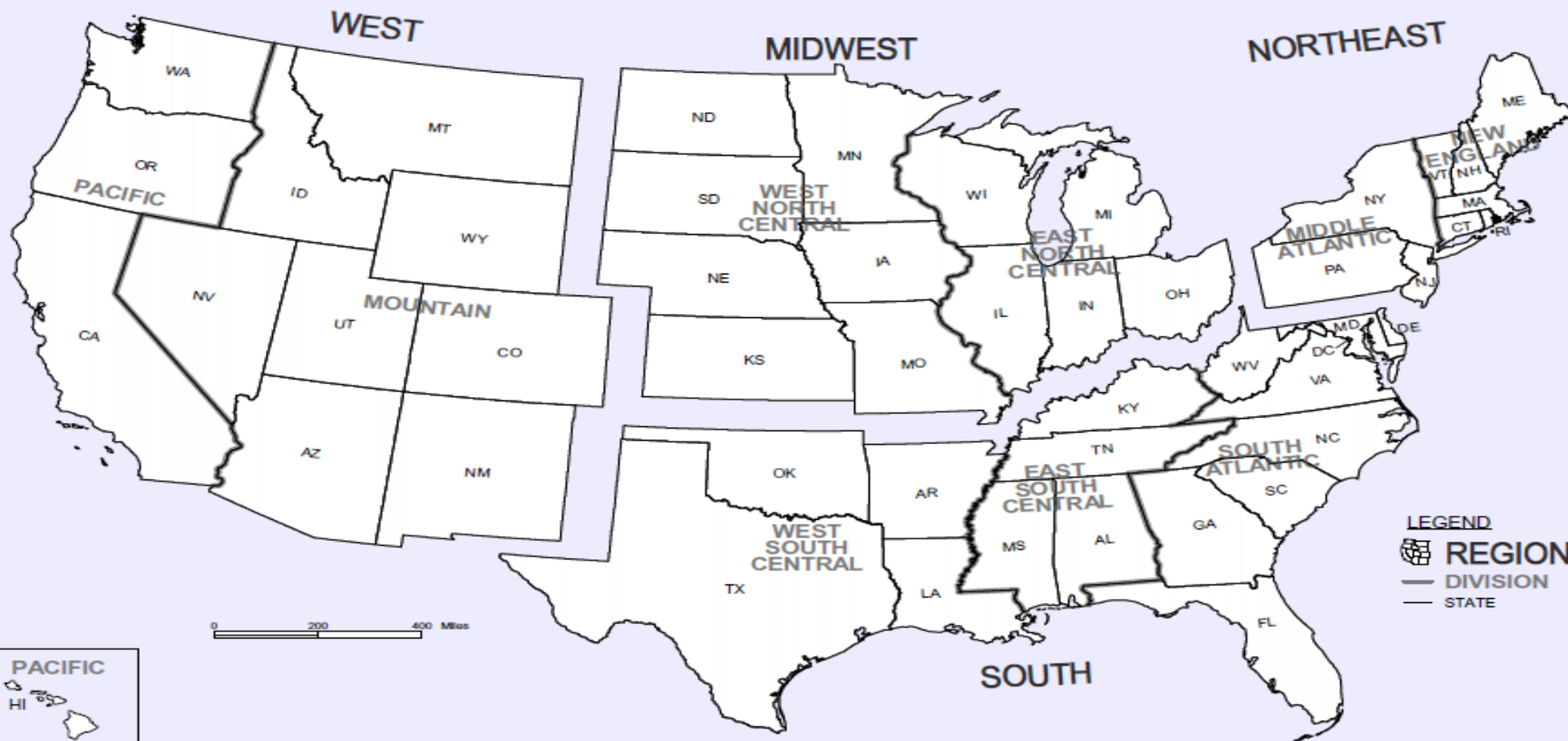
Hispanics are significantly more likely to have children under the age of 18 (80%), and are significantly more likely to participate in outdoor activities with these young children, compared to all other ethnic groups.

Besides fishing, Hispanics participate most in walking, camping, hiking and bicycling.

PACIFIC



Census Regions and Divisions of the United States

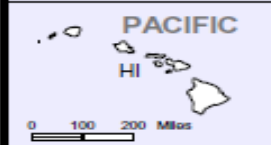


LEGEND

REGION

DIVISION

STATE



U.S. Department of Commerce Economics and Statistics Administration U.S. Census Bureau

Prepared by the Geography Division