



# multicultural fishing research

U.S. Multicultural Quantitative Research  
Regarding Fishing Participation  
Opportunities

October 2019

# business background

The Recreational Boating and Fishing Foundation (RBFF) has identified the multicultural consumer as a key opportunity for growth of fishing participation. These populations are the fastest-growing but their incidence of fishing is lower. Growing the fishing and boating participation rates among multicultural consumers is critical to the RBFF mission of keeping recreational fishing alive in the US.

This research was conducted among target ethnic populations to better understand the needs, motivations, barriers and decision making factors related to fishing and boating, in addition to media preferences and receptivity to fishing communications.

# research objectives

## Specific Research Objectives

The overall objective was to uncover insights regarding fishing and boating among target Multicultural respondents in terms of the following:

- Decision making process for family/outdoor activities, including key influencers;
- Participation, perceptions, motivations and barriers for boating and fishing;
- Unmet functional and emotional needs that fishing can fulfill; and
- Media and communication preferences, including language for Hispanics.

## Actions to be Taken

We will use these results to develop communication and media strategies to better connect with Multicultural consumers to increase their interest and participation in boating and fishing.

**KEY TAKEAWAYS**

**&**

**IMPLICATIONS**

# key takeaways

## fishing & boating

Multiculturals represent a strong opportunity for RBFF to grow both fishing and boating occasions by promoting them as a memorable and relaxing break that fosters family bonding.

1

Fishing and boating are both seen as good family activities that allow these multiculturals to relax, escape from their routines, and create new memories, which aligns well with their top drivers for selecting outdoor activities. Emphasizing these associations will encourage multiculturals to consider fishing and boating as part of their family activities.

- Hispanics are more likely to seek outdoor leisure activities that provide an escape from their day-to-day routine (76% vs 66% AA/66% Asian), good exercise (71% vs 66%/64%), and allow them to connect with nature (71% vs 55%/62%) and disconnect from technology (61% vs 50%/41%), so these should be especially prominent in any communications targeted to Hispanics.

2

Both fishing and boating are considered fun (66% fishing/75% boating) and relaxing (73%/61%) activities that also bring a sense of contentment (60%/51%). Multiculturals also associate fishing more with accomplishment (73%) and mindfulness (59%), while boating is seen more as exciting (70%) but expensive (58%). The positive associations with fishing are stronger among Occasional/Lapsed Anglers compared to Potential Anglers.

- African-Americans have a more positive view of fishing than do Hispanics or Asian-Americans. Key differentiators include their views about fishing promoting family bonding and being a good group activity, being something they can do close to home, and the nostalgic ties to childhood memories. AA are also more likely to associate it with accomplishment and excitement.

3

Educating these consumers will be critical, as their top barriers to fishing are not having the equipment (56%) or a license (50%), and not knowing where (37%), when (37%) and how (35%) to fish. Not surprisingly, these barriers are more prominent among Potential Anglers, so encourage them to buy fishing equipment to be ready when the mood strikes.

- The main barriers to fishing do not vary by ethnicity with lack of equipment and license being the top reasons.

# key takeaways

## fishing & boating

**Communications strategy should consider that multiculturals have short planning time frame, and should leverage word of mouth and internet searches to effectively reach them.**

- 4** Communications need to reach multiculturals in a short time frame, as they typically decide their outdoor activities about a week before or less (70% vs 30% who plan more than a week ahead). If fishing is seen as a simple and quick “grab your rod and go” activity, then it will naturally fit in the multiculturals’ short planning process.
  - Hispanics tend to have the shortest planning time, followed by African Americans and Asians.
- 5** Word of mouth (80%) and online searches (61%) are their main sources of information for outdoor activities, with social media and specific web sites being used much less often.
  - While all ethnic groups rely on friends and family as their primary source of ideas for outdoor activities, word of mouth is especially important for Hispanics, so activation that creates a buzz will be critical to motivate them.
  - Asian-Americans are equally likely to search the internet as they are to seek insight from friends and family.
- 6** Hispanics prefer to receive communications in both English and Spanish, and most are not fully comfortable with advertising in Spanglish, so campaigns and information should be in both languages.
  - Additionally, studies have shown that Spanish-language advertising can achieve higher emotional resonance with bilingual Hispanics, so consideration should be given to this tactic to make the sport more approachable to this important segment of the population.



# key takeaways

## boating specific

To grow occasions among Multiculturals, boating should be promoted as a fun and exciting activity/escape for a group or family, with Asian-Americans as the most positive toward the activity.

- 1 Compared to fishing, boating is seen as more of a group activity among these multicultural consumers, and more exciting. Anglers, in general, see boating as a good group activity that allows them to create new memories;
  - Asian-Americans have a somewhat more positive view of boating, and are also the most likely to view boating as an escape from their day-to-day routine.
  - African-Americans have a slightly less positive view of boating than other multiculturals, as they are less likely to consider it a good group activity that promotes family bonding and connects them with nature. However, they are also less likely to consider boating to be expensive and complicated.

- 2 While fishing is more about accomplishment and relaxation, boating is more about fun and excitement. These associations are consistent across ethnicities.
  - Past 2 year boating participants place a higher importance on group activities, disconnecting from technology, reflecting on life, staying close to home, activities they grew up with, and posting on social media compared to non-boaters.

- 3 Multiculturals who have gone boating in the past two years are more likely to be Married, have children, be employed full time, be college graduates and have a household income of \$75k or more.
  - *Women* are more likely than men to feel boating is fun, but expensive, and provides contentment and an escape from their daily routine; *men* are more likely to get a sense of accomplishment from boating and are more nostalgic about the activity.
  - *Younger* multicultural anglers are more likely to consider boating something they can share on social media.

# | moving forward

## 1

### ACCESSIBILITY:

Make it easier for Multiculturals to experience boating and fishing as a family or group since these activities are experiential (i.e., they need to be experienced to be fully appreciated) yet somewhat inhibiting (i.e., since many don't have the equipment, license, or know-how). To help build their confidence in participating in the sports:

- Organize fishing and boating events (consider promoting via Facebook) where the Multicultural population and their family and friends can learn from professionals.
- Create partnerships with local fish/boat rental shops to provide group packages (sold via Groupon) that make boating and fishing simpler, social/fun, and less expensive and include the boat/equipment rental, license, bait, 'how-to-guide', etc.
- Leverage local organizations and community churches/centers to promote the sport as an activity that can be done as a family and with their communities/members.

## 2

### RELEVANCE:

Messaging and visuals should focus on how fishing and boating help make new family memories while connecting with nature and escaping from everyday routines. For boating, specifically, show the fun and excitement of being on the water with family and friends.

## 3

### APPROACHABILITY:

Make boating and fishing more approachable to Multiculturals through education such as YouTube tutorials (in both English and Spanish) that show fishing techniques as well as social media posts on fishing locations, licenses required, laws, types of fish, fish migration and even live chat options via Facebook and/or WhatsApp to answer any questions Multicultural respondents may have. Promote the web pages and consider chatbots that can answer questions in both languages.

## 4

### RELATABILITY:

Portray a more diverse mix of actual Multicultural anglers that consumers can identify with and better relate to including younger people (kids/young adults) and females. This should apply to all marketing efforts, including websites and social media.



**MOTIVATORS**

**&**

**BARRIERS**

# Multiculturals look for outdoor activities that provide memorable escapes for the whole family



*By age, Younger* multiculturals are more likely to want a thrill or sense of accomplishment from their outdoor activity while older multiculturals want to connect with nature more and to teach children important skills.

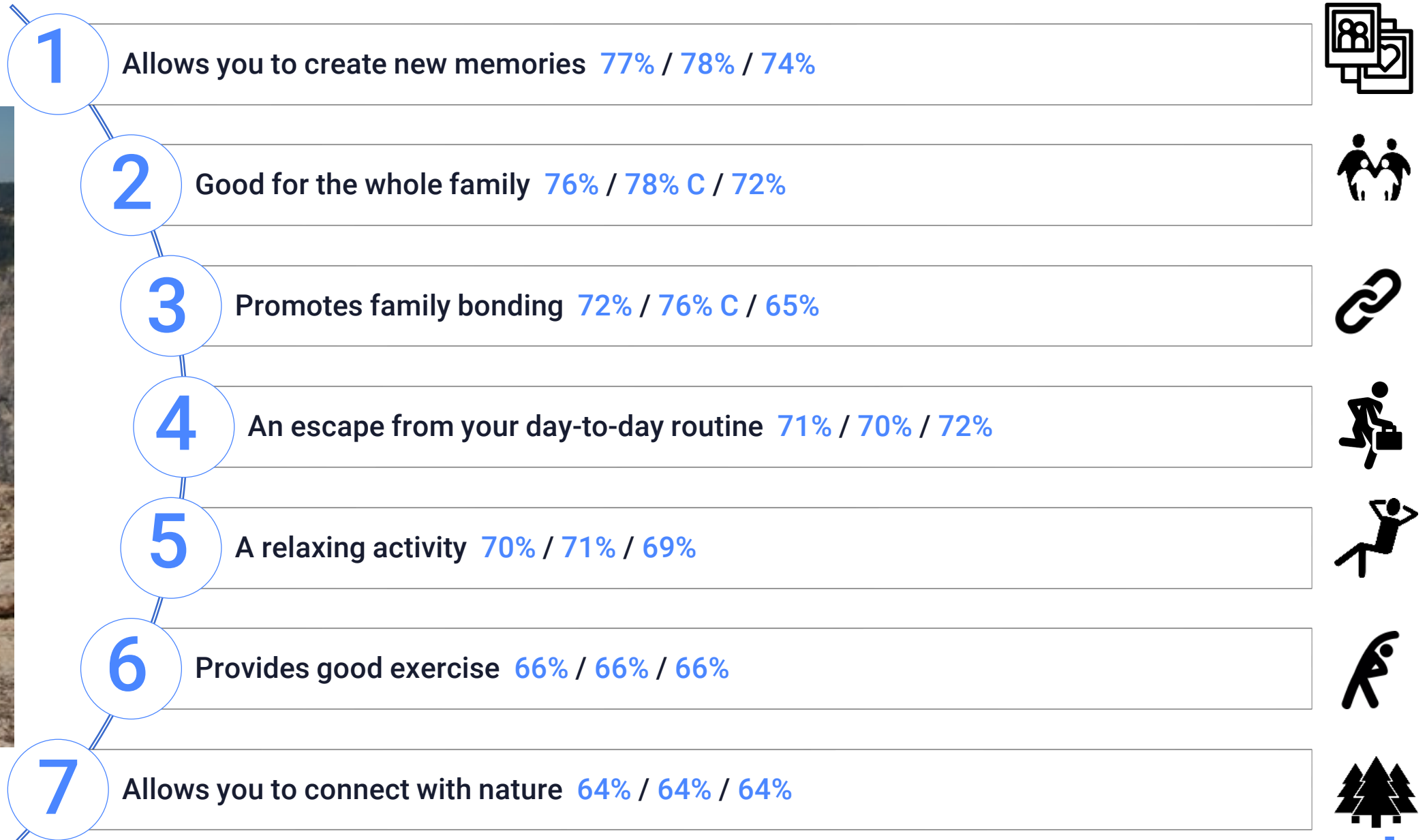


This is consistent with the findings from the qualitative phase which indicated that Multiculturals feel somewhat bogged down by modern life and look for new experiences that provide a more meaningful distraction than their phones or social media and an opportunity for face-to-face bonding with others.



## Top Drivers for Selecting Outdoor Activities

Total Respondents (A) / Occasional/Lapsed Anglers (B) / Potential Anglers (C)



*Past 2 year boating participants place a higher importance on group activities, disconnecting from technology, reflecting on life, staying close to home, activities they grew up with, and posting on social media.*

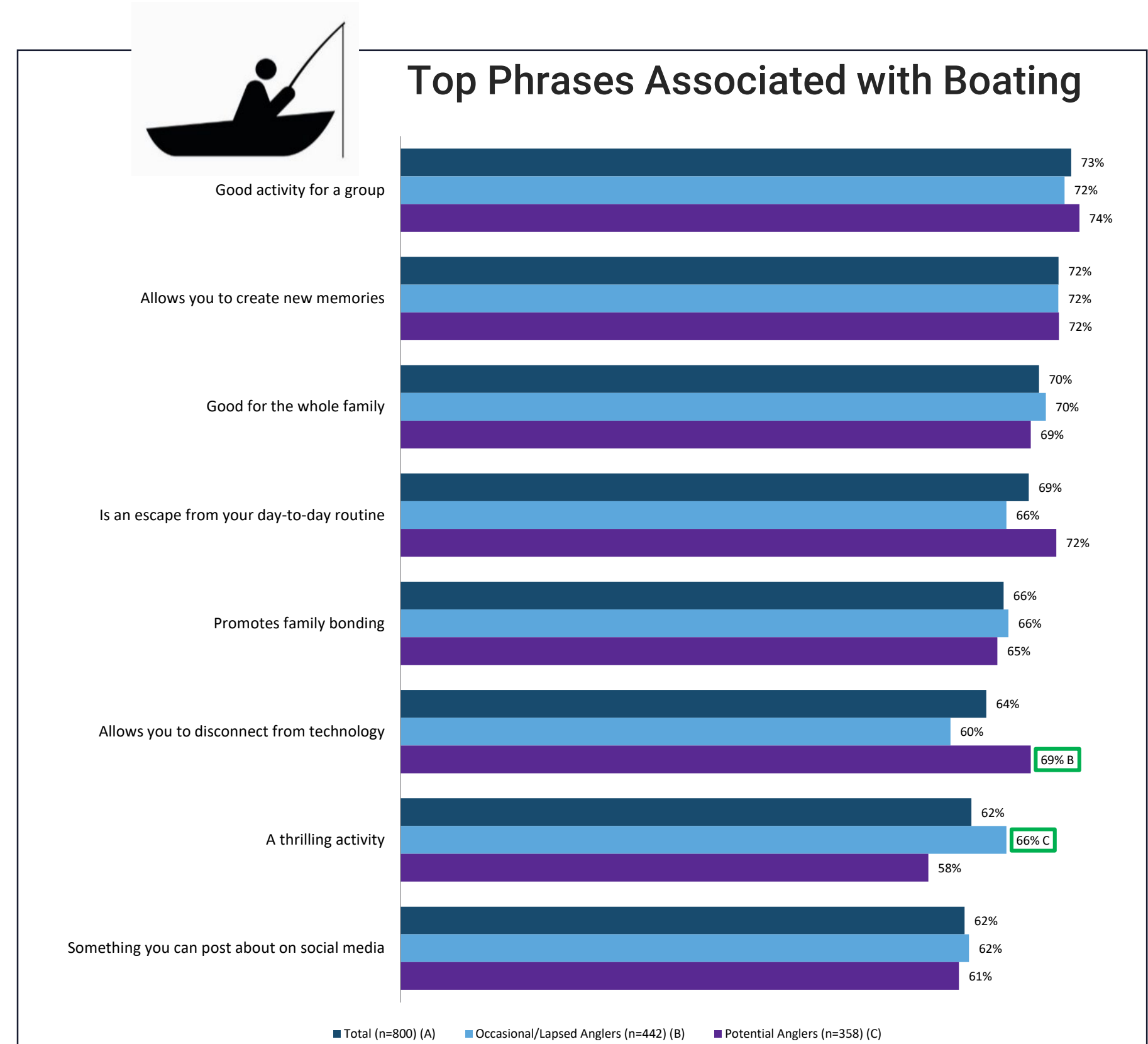
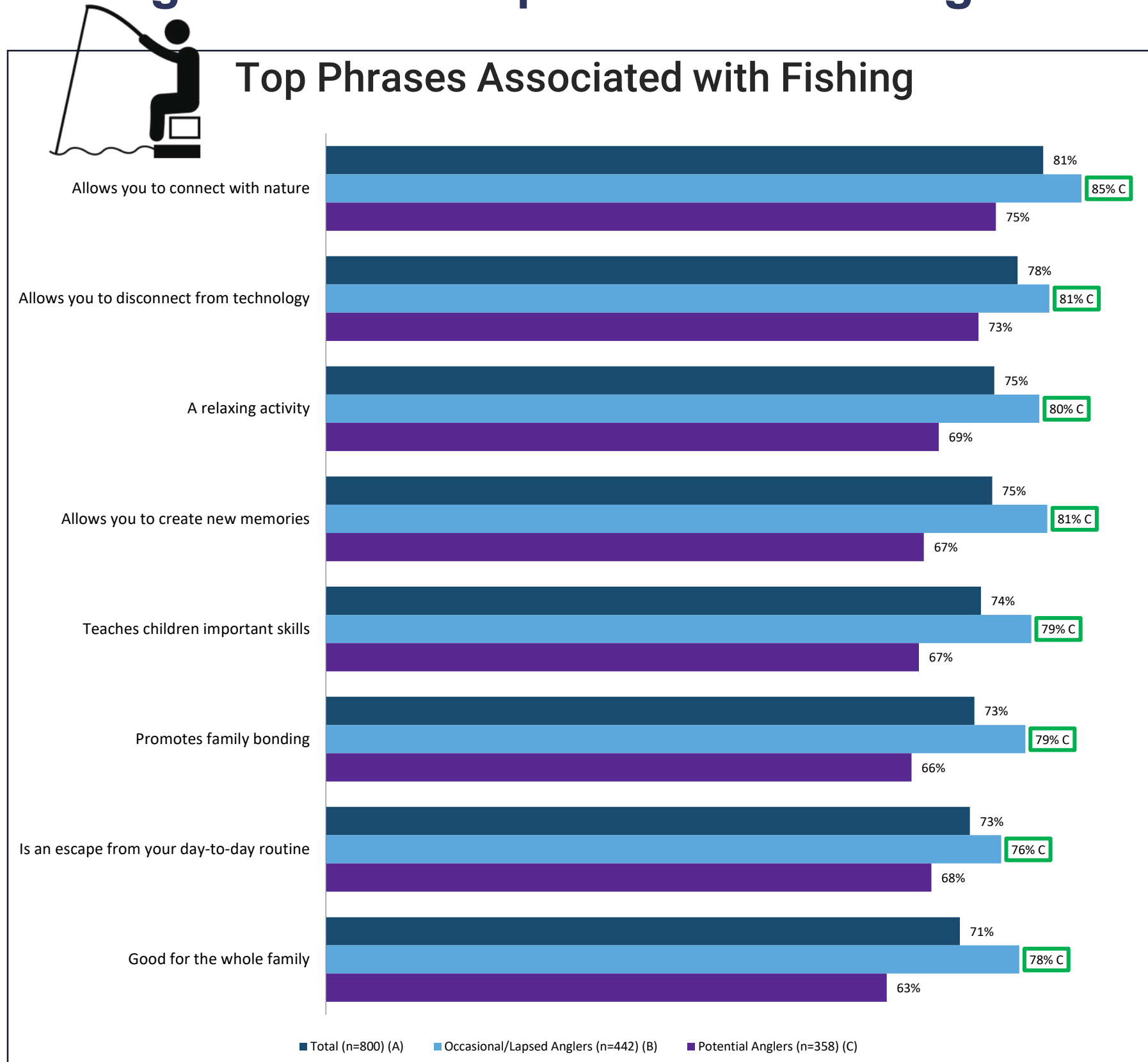
A1. How important are each of the following when deciding between outdoor leisure activities for yourself and your family?

Note: Full data can be found in the appendix

Base: Total Respondents (Total N=800; Occasional/Lapsed N=442; Potential N=358)

A/B/C = Statistically higher than the indicated group and the 95% confidence level

# Fishing & boating align well with outdoor activity drivers for multiculturalals, being associated with family bonding and creating new memories; Occasional/Lapsed Anglers are more positive for fishing



B1. Which of the following phrases describe fishing and boating?

Note: Full data can be found in the appendix

*Older* multiculturalals associate fishing more with relaxing and connecting with nature.

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

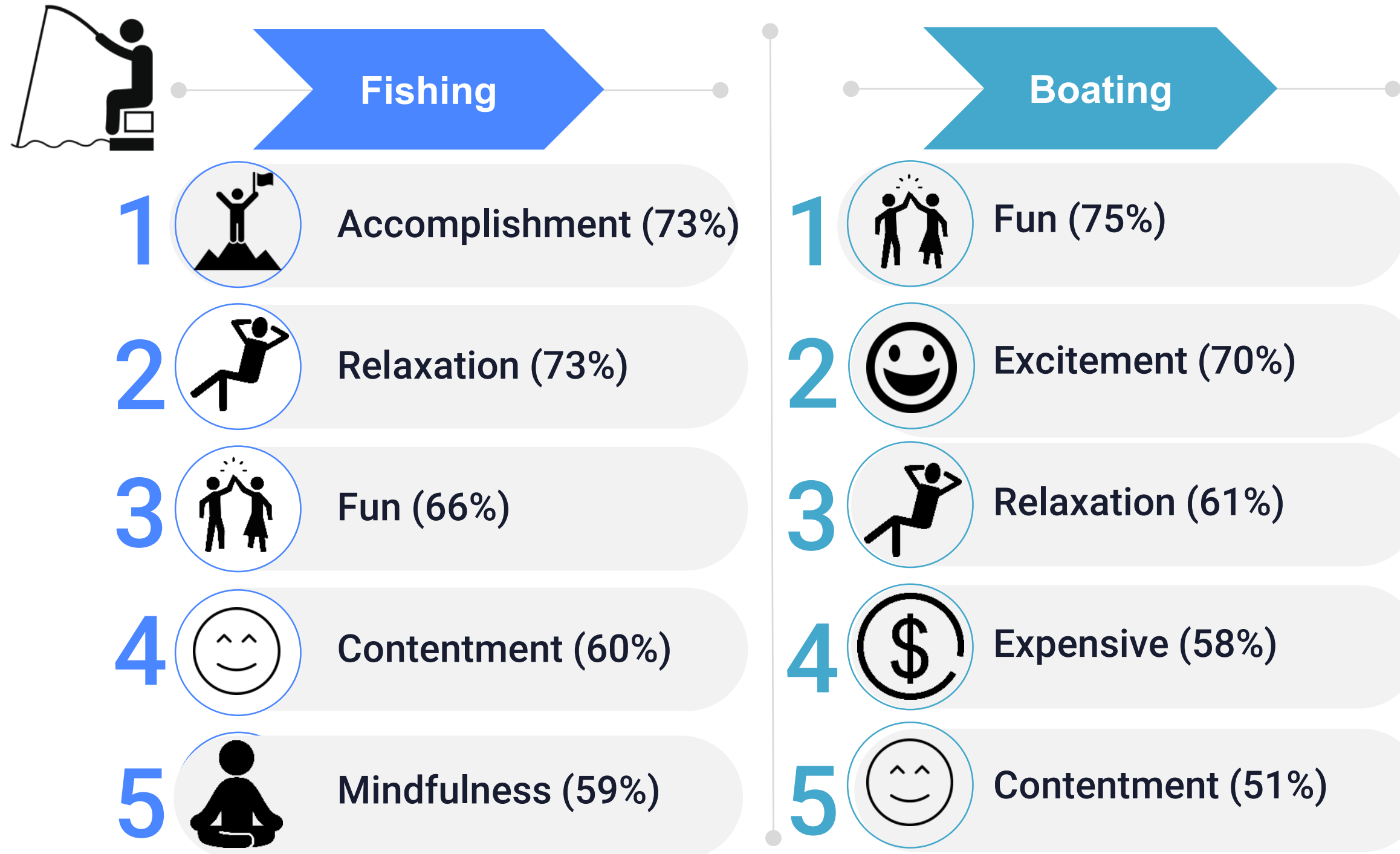


# Both fishing and boating are considered fun and relaxing, while fishing provides a sense of accomplishment and mindfulness, and boating is more exciting but expensive.

As noted on the previous slide, *older* multiculturals associate fishing more with relaxation and contentment while *younger* multiculturals have more barriers, with at least 1/3<sup>rd</sup> seeing it as difficult, frustrating, complicated, and/or boring.

As uncovered in the qualitative sessions, Multiculturals feel that the dichotomy of the excitement **and** the relaxation of boating and fishing should be highlighted in advertising/messaging.

## Emotions Associated with Fishing & Boating



B2. Which of the following emotions describe fishing and boating?

Base: Total Respondents (N=800)

Note: Full data can be found in the appendix

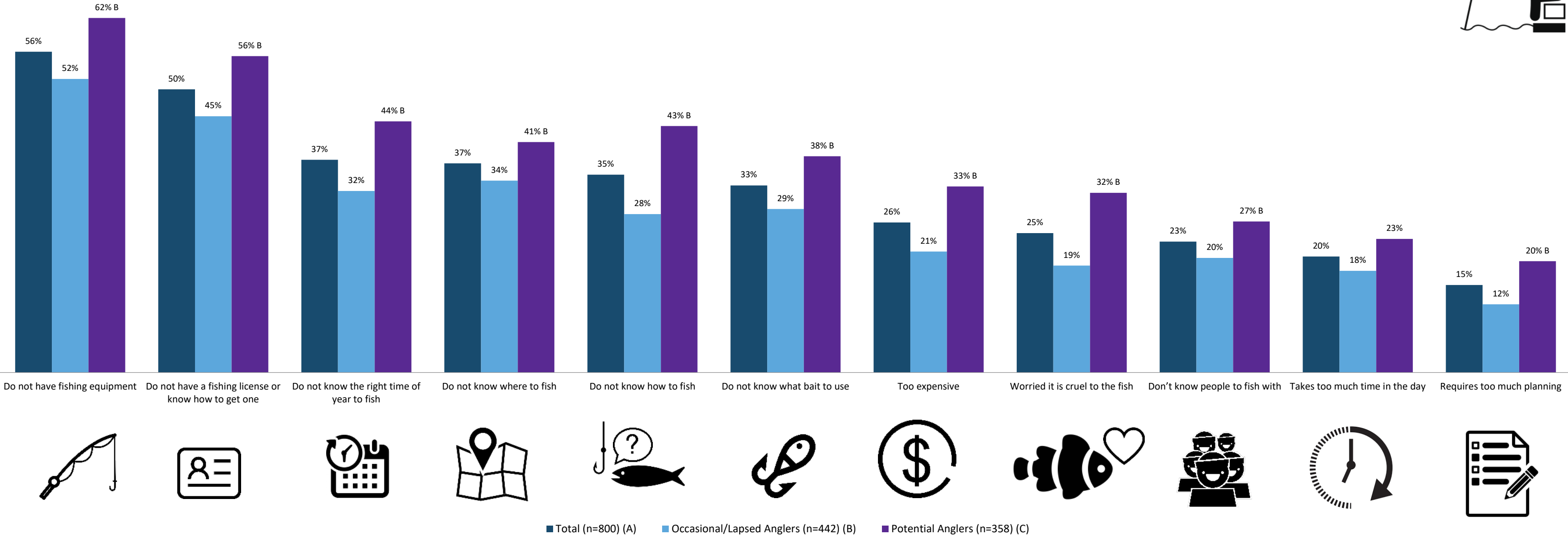
# Top barriers for fishing include lack of equipment or a license, and also not being knowledgeable about the sport; as expected, Potential Anglers have stronger barriers than Occasional/Lapsed.

Younger anglers are more likely to claim they don't know how to fish, it's too expensive, and too time consuming.



This is consistent with the findings from the qualitative phase which identified that a lack of knowledge/ resources was a key barrier for Multiculturals .

## Barriers to Going Fishing



B4.How important are each of the following reasons for NOT fishing?

Base: Total Respondents
















A/B/C = Statistically higher than the indicated group and the 95% confidence level




# OUTDOOR ACTIVITY DECISION MAKING

# Most anglers tend to be active runners, and many also participate in biking and hiking .

## Top Other Activities Currently Participate In:

	Total (A)		Occasional/Lapsed Anglers (B)		Potential Anglers (C)
	Running 65%		Running 59%		Running 72% <sup>B</sup>
	Biking 43%		Biking 46%		Hiking 47% <sup>B</sup>
	Hiking 41%		Hiking 36%		Biking 39%
	Camping 26%		Camping 31% <sup>C</sup>		Camping 21%
	Boating 12%		Boating 17% <sup>C</sup>		Boating 6%

 *Multicultural past 2 year boating participants are more likely to be Married, have children, be employed full time, be college graduates and have a household income of \$75k or more.*

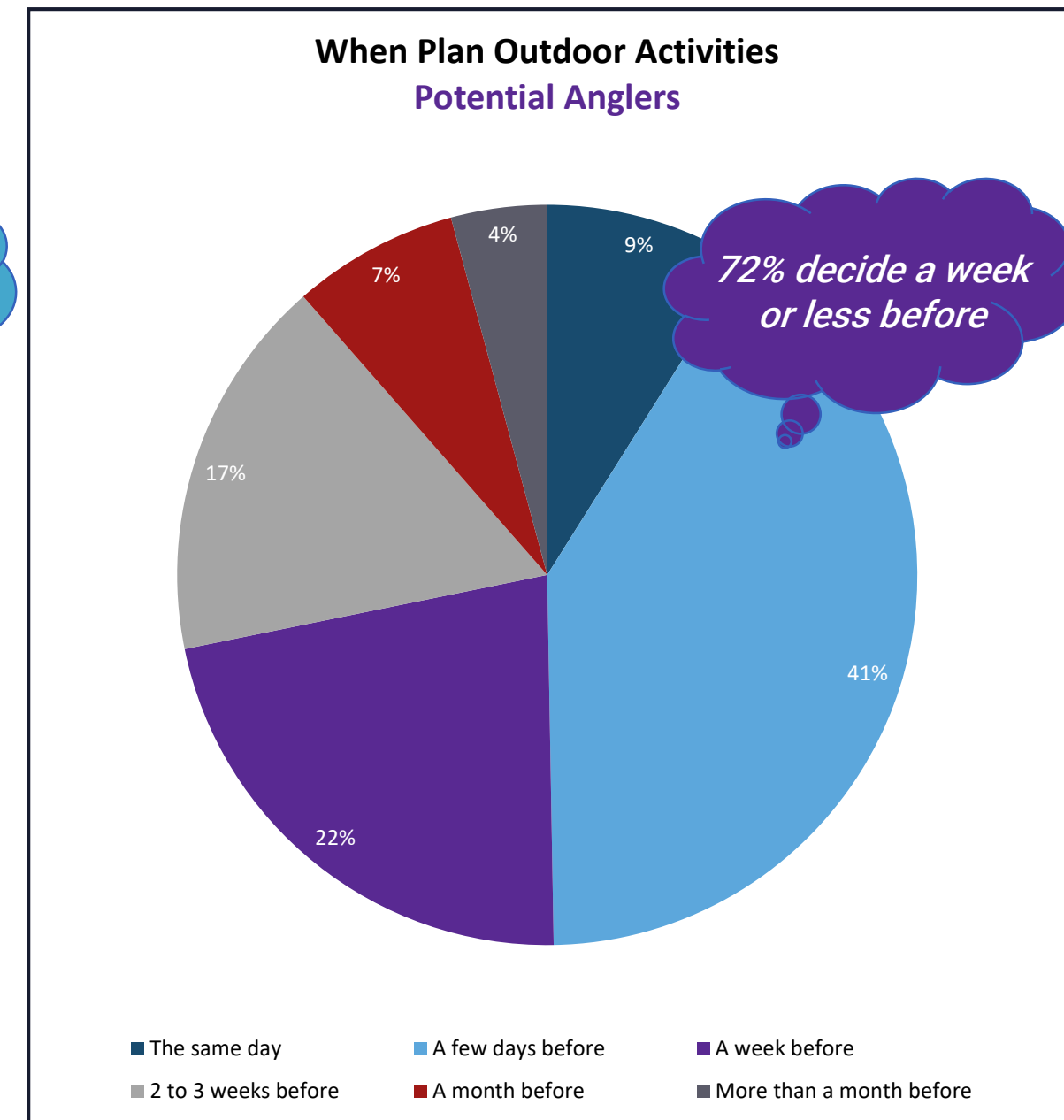
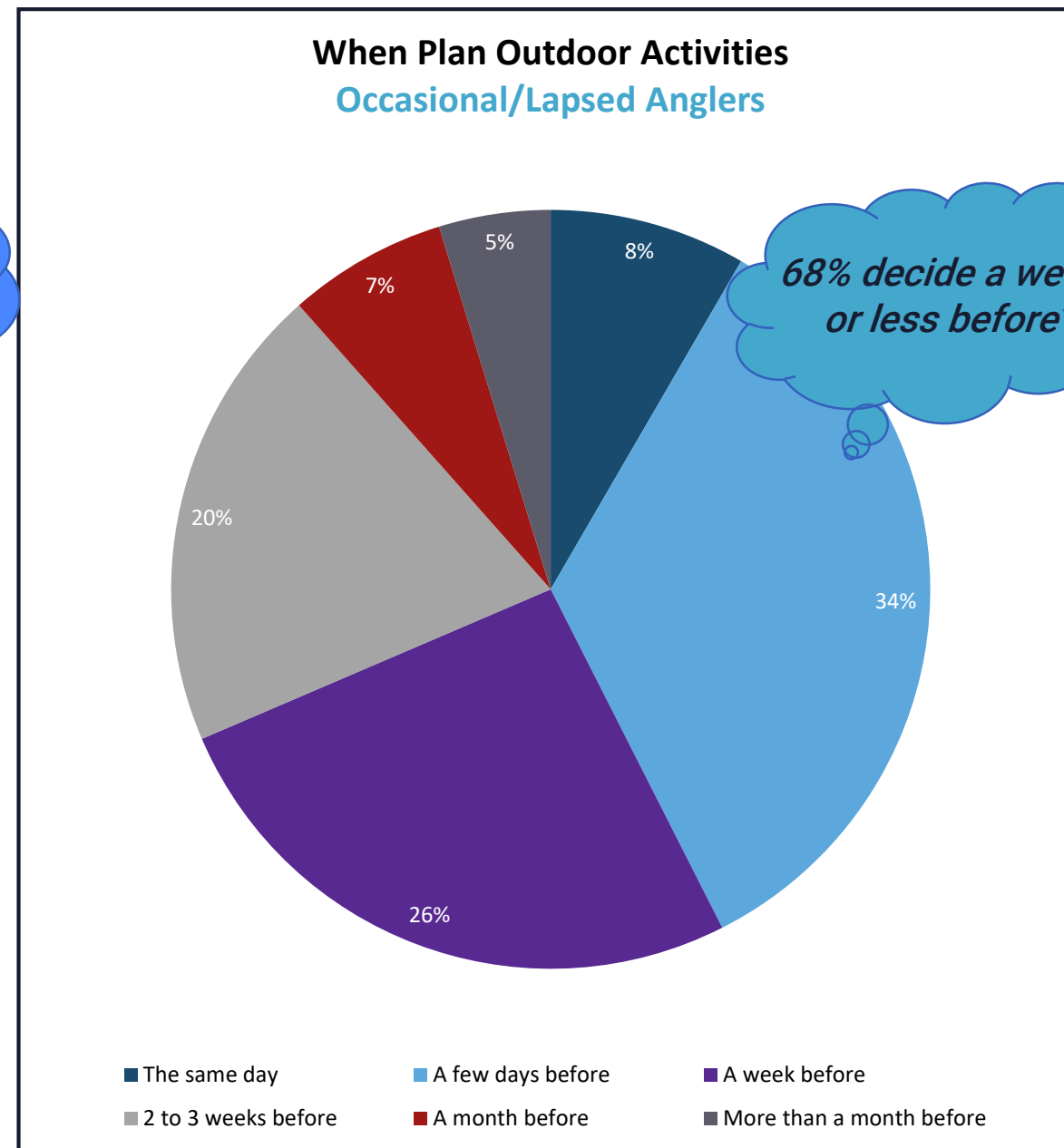
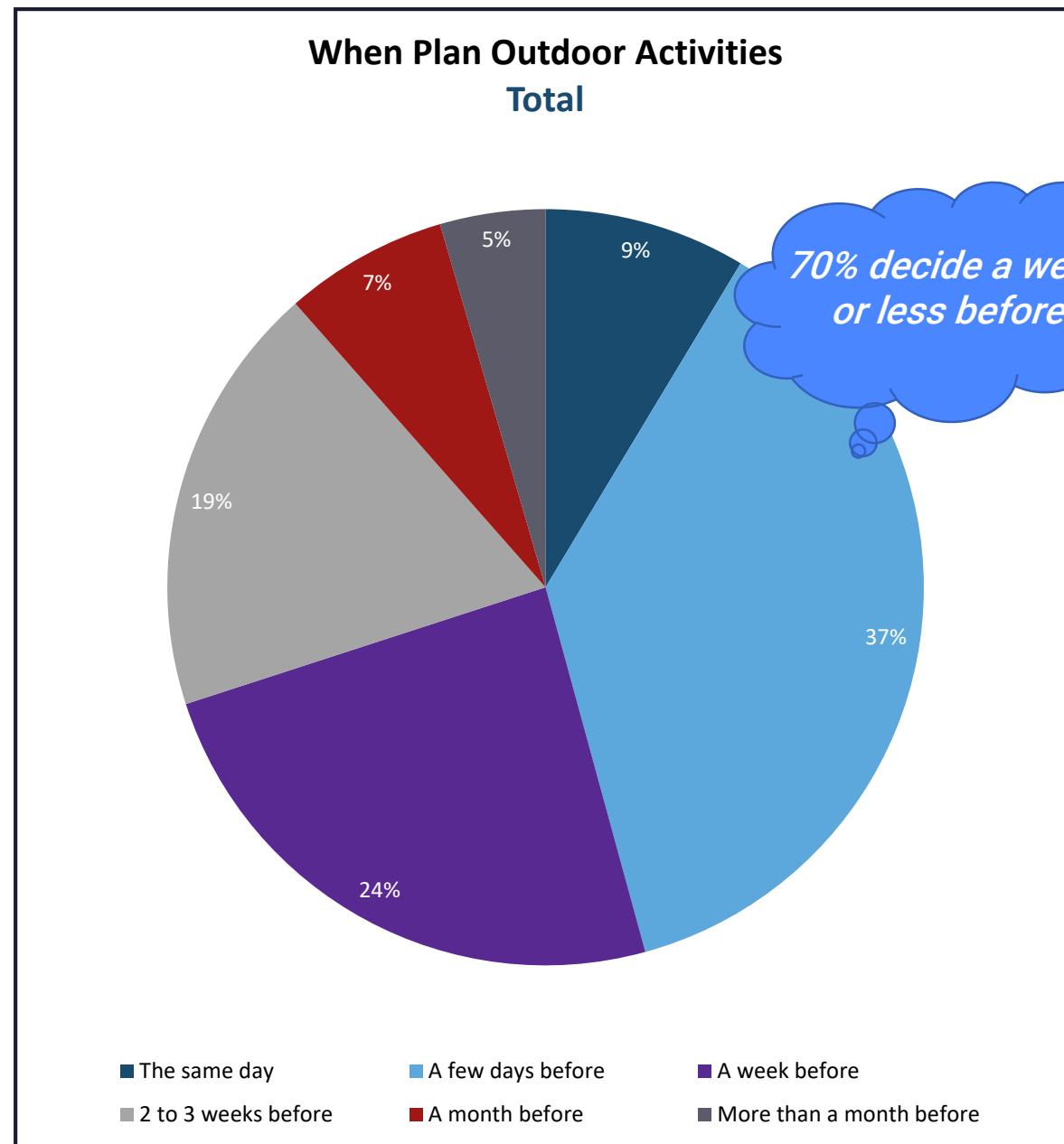
# Multiculturals do not plan their outdoor activities very far in advance, with most making their decision a week or less before!



Respondents from the qualitative phase mentioned that outdoor activities for key holidays (Memorial, 4<sup>th</sup> of July & Labor Day) were often planned with more than one week (2 weeks to one month ahead).



## How Far In Advance Typically Plan Outdoor Activities



A2. Which of the following best describes how far in advance you typically plan your outdoor activities?

Base: Total Respondents (Total N=800; Occasional/Lapsed N=442; Potential N=358)

A/B/C = Statistically higher than the indicated group and the 95% confidence level

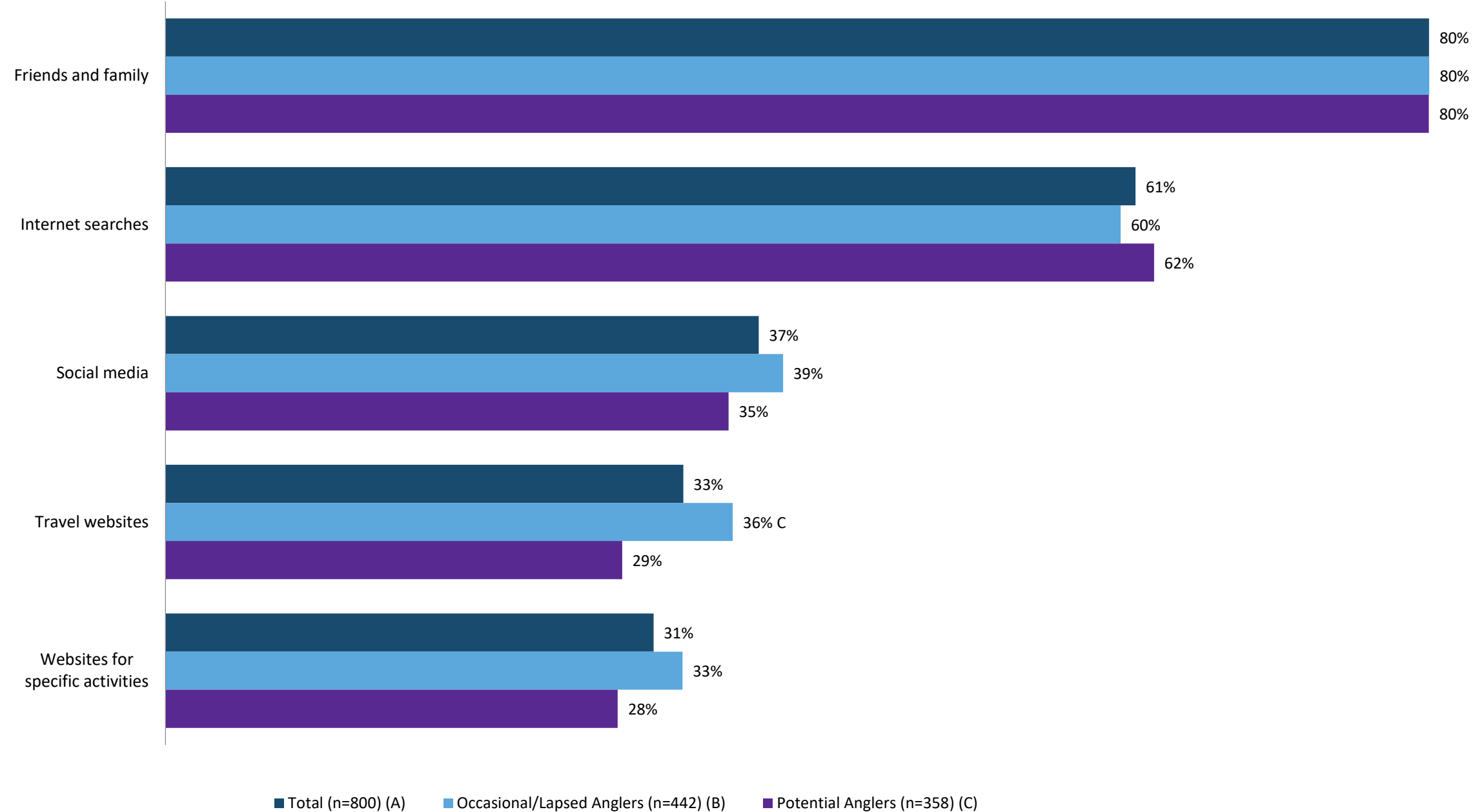
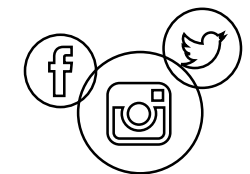
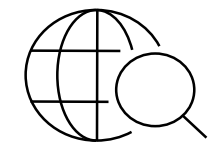
# Most multiculturals look for ideas for outdoor activities by asking friends and family or by searching online

*Younger and female anglers are more likely to rely on their friends and family for planning outdoor activities. Younger anglers also look to social media more than do older anglers.*



As uncovered in the qualitative phase, Multicultural anglers felt social media ads and posts from friends and relevant influencers that showed the entire fishing experience (activity, family, location, etc.) would catch their attention and increase motivation to fish/boat.

## Sources Used to Plan Outdoor Activities



A3. Which of the following, if any, do you use to help plan and decide outdoor activities?

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

As expected, Facebook and Instagram are the most popular websites visited, while very few of these multicultural anglers visit a fishing-specific site regularly.



**55% Visit Facebook Regularly**

Occasional/Lapsed = 61%<sup>B</sup> / Potential = 48%

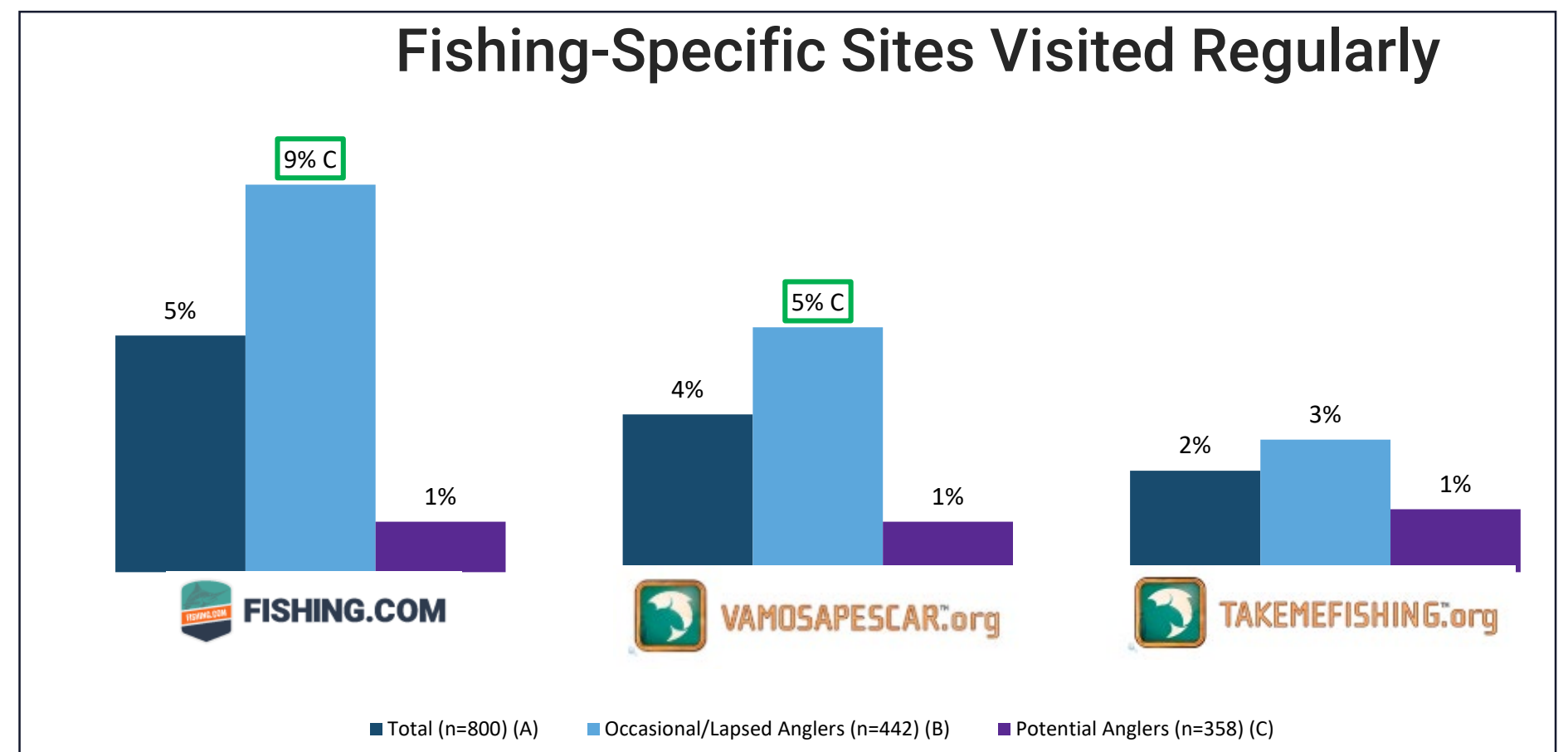


**51% Visit Instagram Regularly**

Occasional/Lapsed = 49% / Potential = 54%



This is consistent with the qualitative phase which showed that Facebook was popular among Gen X multiculturals, while Instagram was popular among Millennials.



Base: Total Respondents

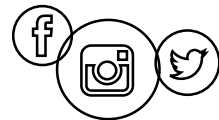
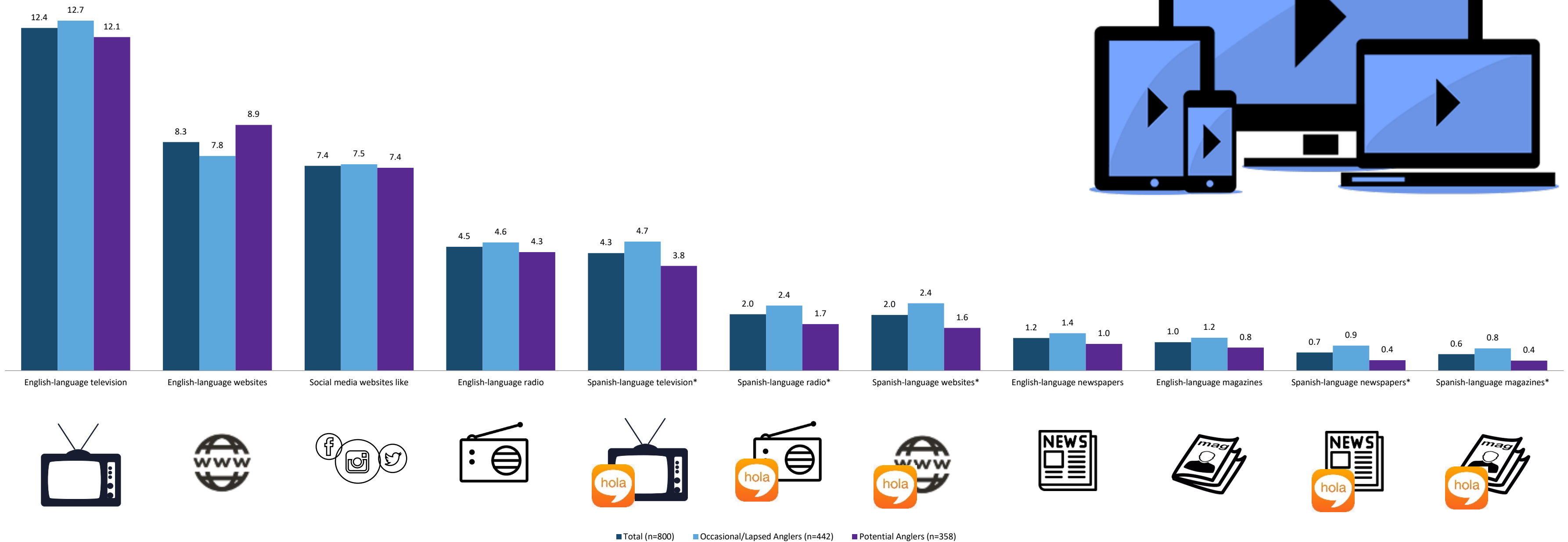
A/B/C = Statistically higher than the indicated group and the 95% confidence level

C3. For the sites/apps listed below, please indicate how often you visit each one.



# Television, digital and social media are the top ways to reach this audience, including both English and Spanish media

Average Weekly Media Hours



C1. In an average week, how many hours would you say you watch, listen to or read the following types of media?

Base: Total Respondents

\* Spanish media was asked among Hispanic respondents only.

A/B/C = Statistically higher than the indicated group and the 95% confidence level

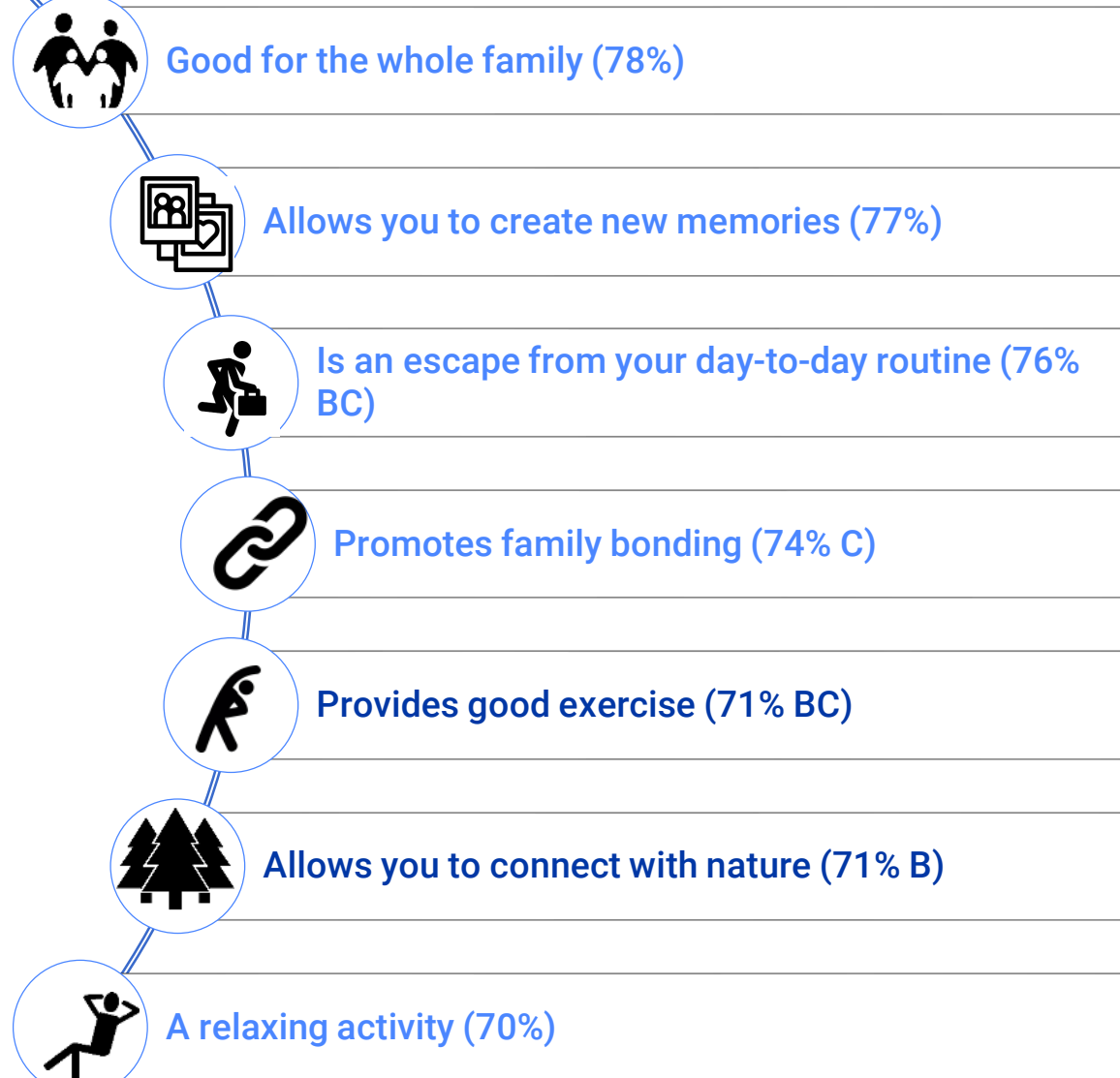
**FISHING &  
BOATING BY  
ETHNICITY**

# Multiculturals, regardless of ethnicity, are seeking family-oriented and memorable outdoor activities that allow them to relax and escape their daily routines

## Most Important Factors for Deciding Between Outdoor Activities (Factors Considered "Very Important")

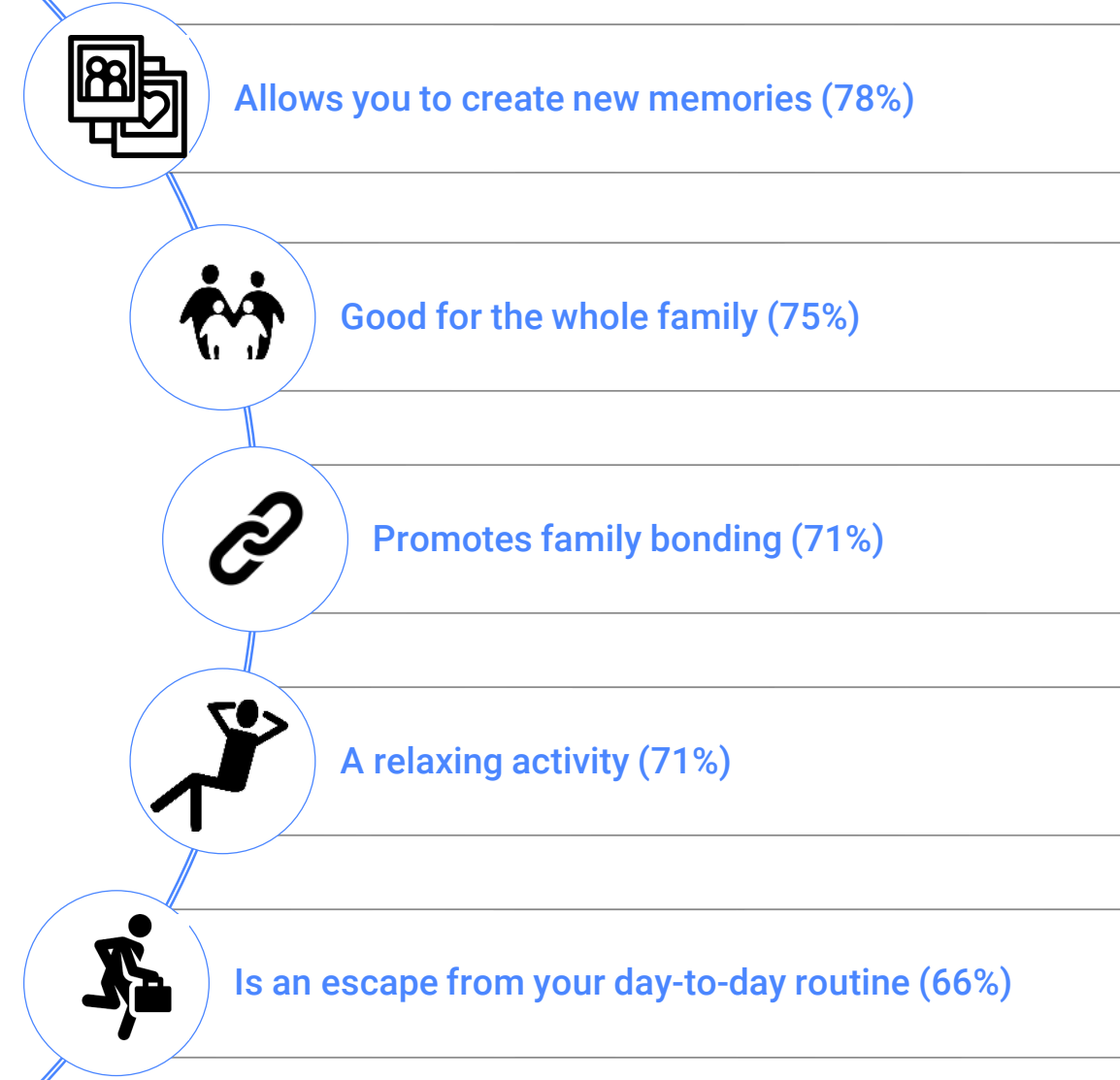
### Hispanics

(n=400) (n=280)

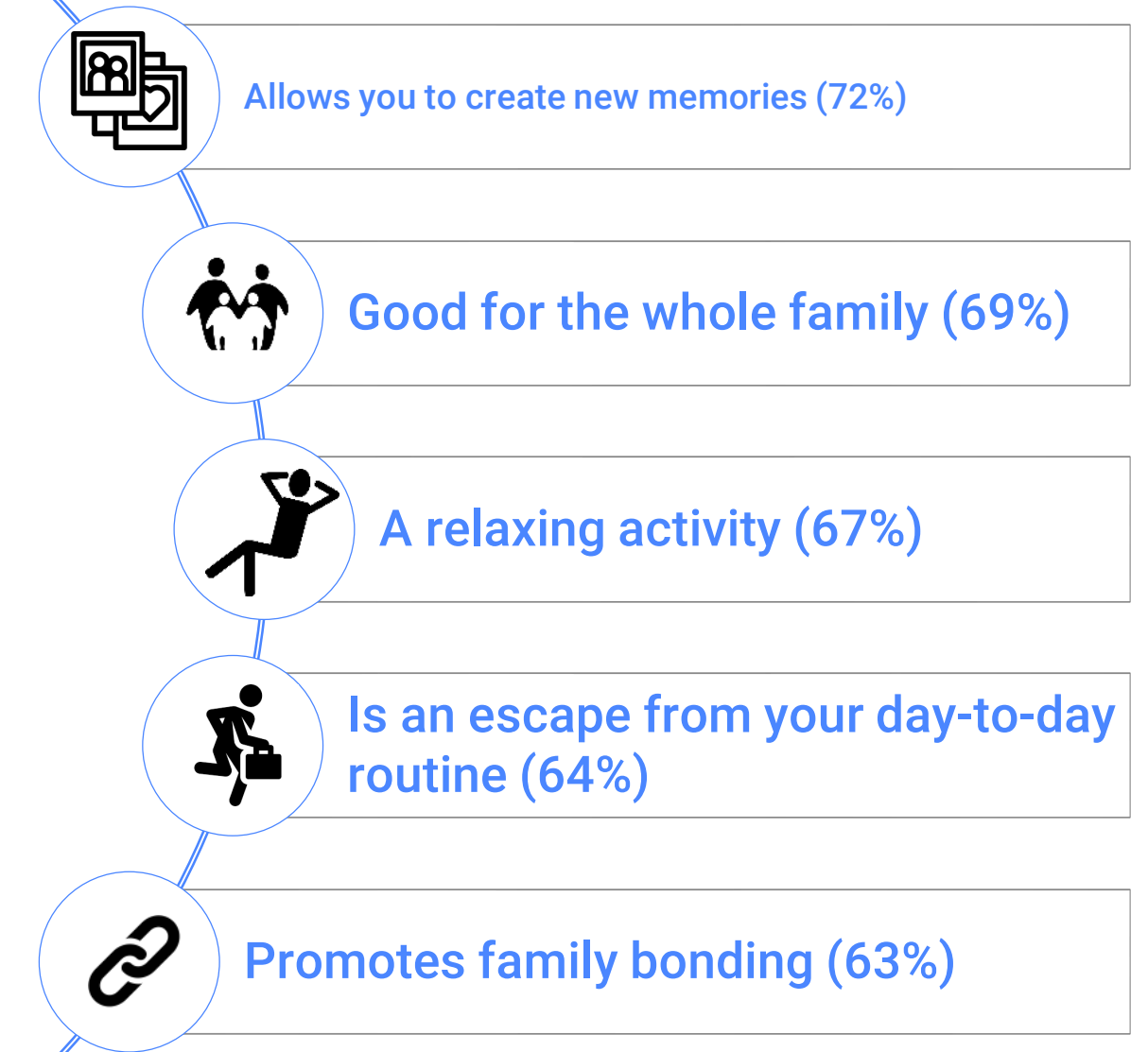


### African-Americans

(n=120)



### Asian-Americans



A1. How important are each of the following when deciding between outdoor leisure activities for yourself and your family?

Note: Full data can be found in the appendix

Base: Total Respondents

NOTE: Showing top responses by ethnicity. Full data can be found in the appendix.

# While multiculturals agree that fishing allows them to connect with nature, disconnect from technology, and create memories, African-American anglers have a more positive view of fishing

## Phrases Most Associated With Fishing (By Ethnicity)



B1. Which of the following phrases describe fishing and boating?

Base: Total Respondents

Note: Full data can be found in the appendix.

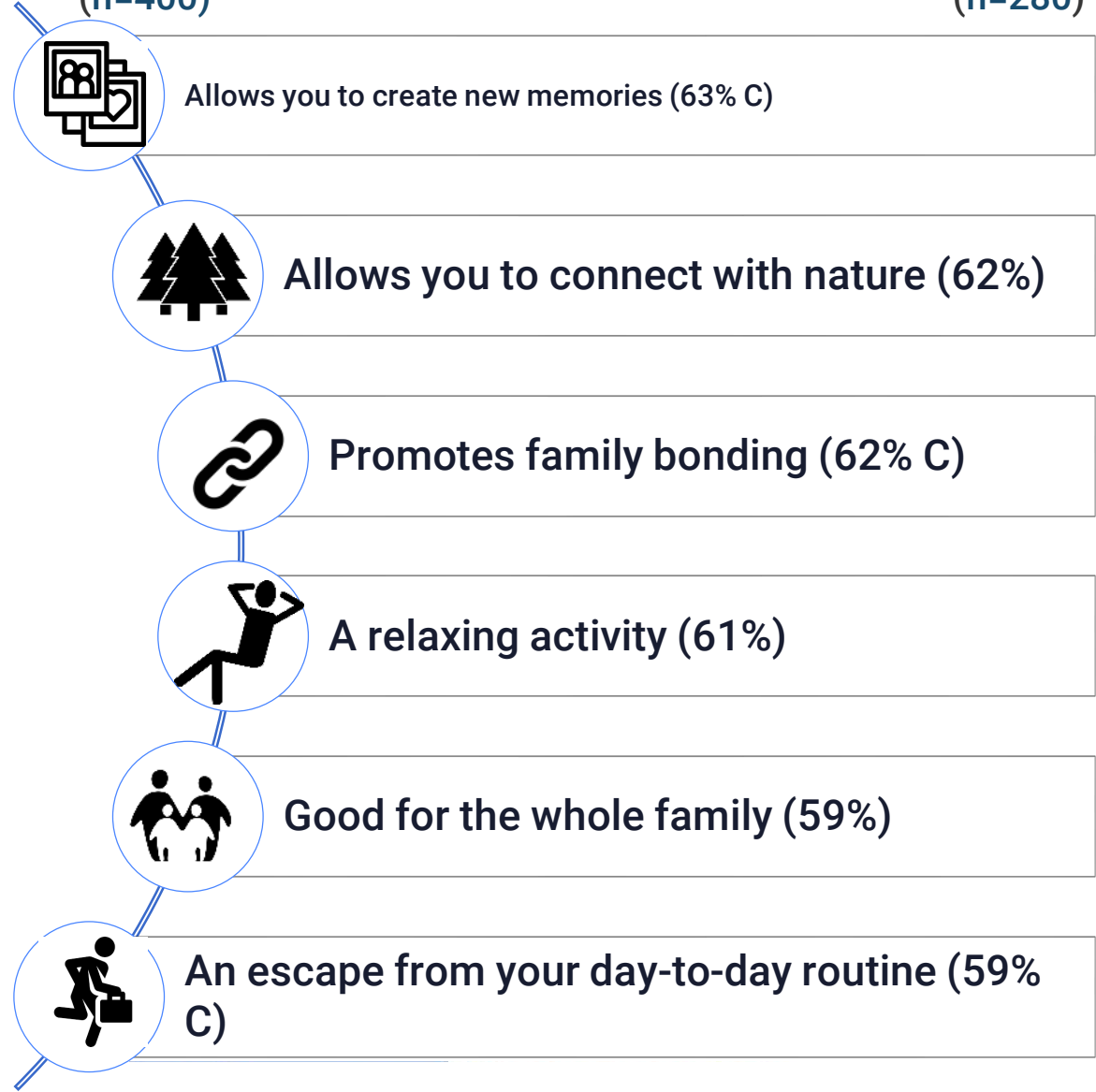
# Multiculturals, regardless of ethnicity, go fishing to connect with nature and their family, to relax/escape, and to create new memories .

## Most Important Factors for Going Fishing ("Very Important" By Ethnicity)



### Hispanics

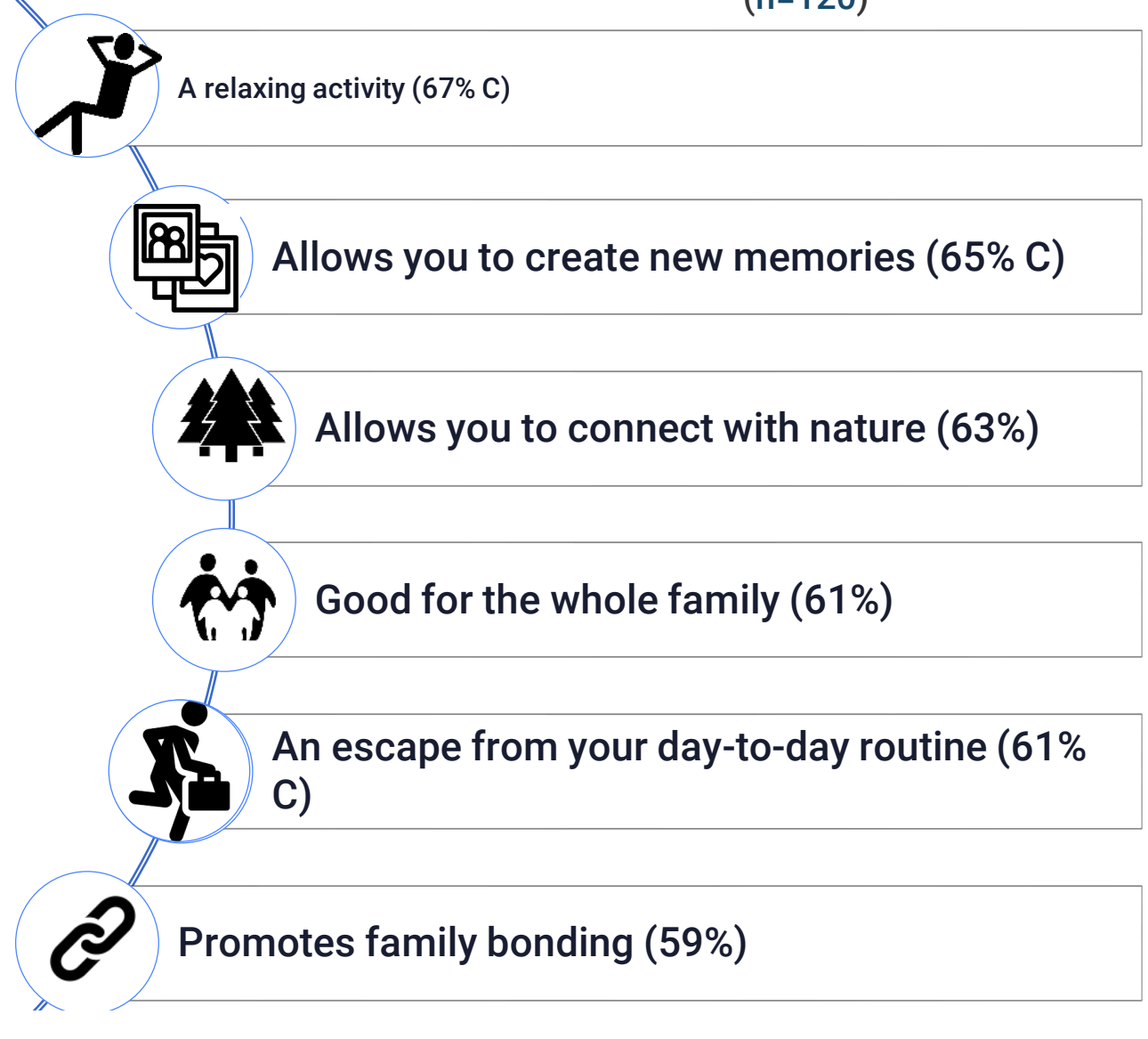
(n=400)



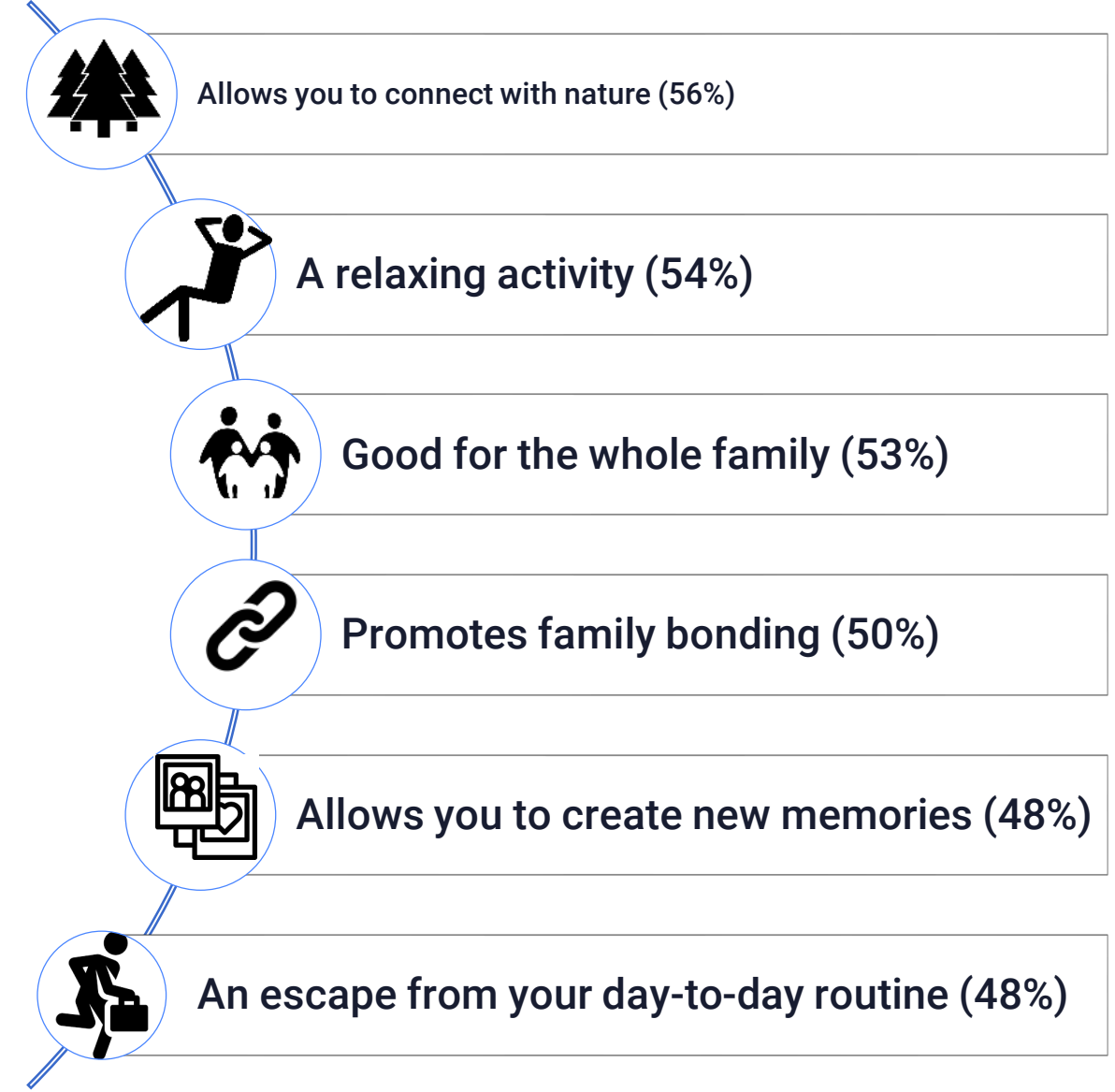
(n=280)

### African-Americans

(n=120)



### Asian-Americans



Base: Total Respondents



# All multiculturals believe that fishing provides them a sense of accomplishment, relaxation, and contentment/mindfulness while still being fun; African-American anglers also find fishing exciting

## Emotions Most Associated With Fishing (By Ethnicity)

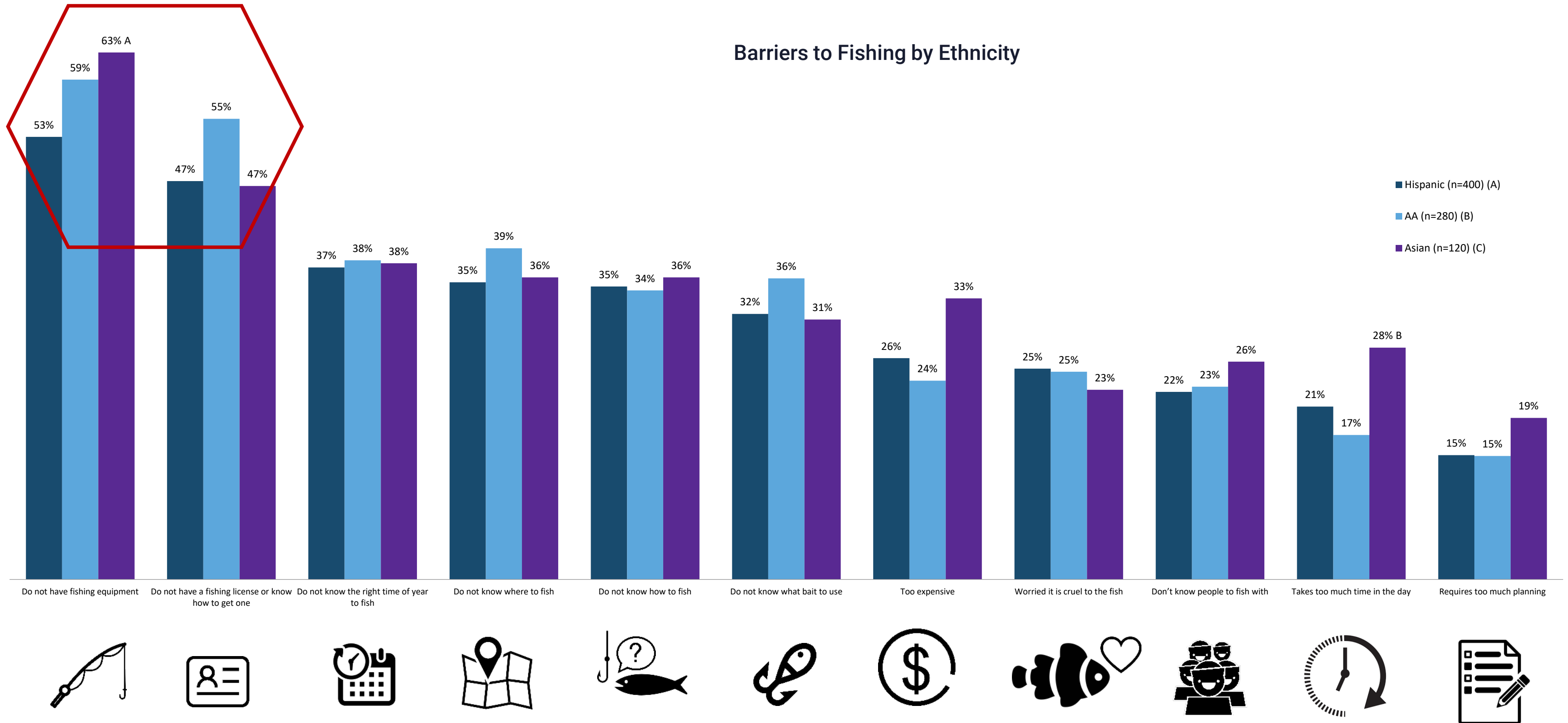


B2. Which of the following emotions describe fishing and boating?

Note: Full data can be found in the appendix.

Base: Total Respondents

# Across ethnicities, the biggest obstacles to fishing is not having the equipment and not having a fishing license



B4.How important are each of the following reasons for NOT fishing?

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

# While Multiculturals agree that boating is a good group activity that allows them to create new memories, Asian-Americans have a somewhat more positive view of boating, overall



## Phrases Most Associated With Boating (By Ethnicity)



B1. Which of the following phrases describe fishing and boating?

Base: Total Respondents

Note: Full data can be found in the appendix.

# Across ethnicities, boating is seen as fun, exciting and relaxing, but also expensive

## Emotions Most Associated With Boating (By Ethnicity)



B2. Which of the following emotions describe fishing and boating?

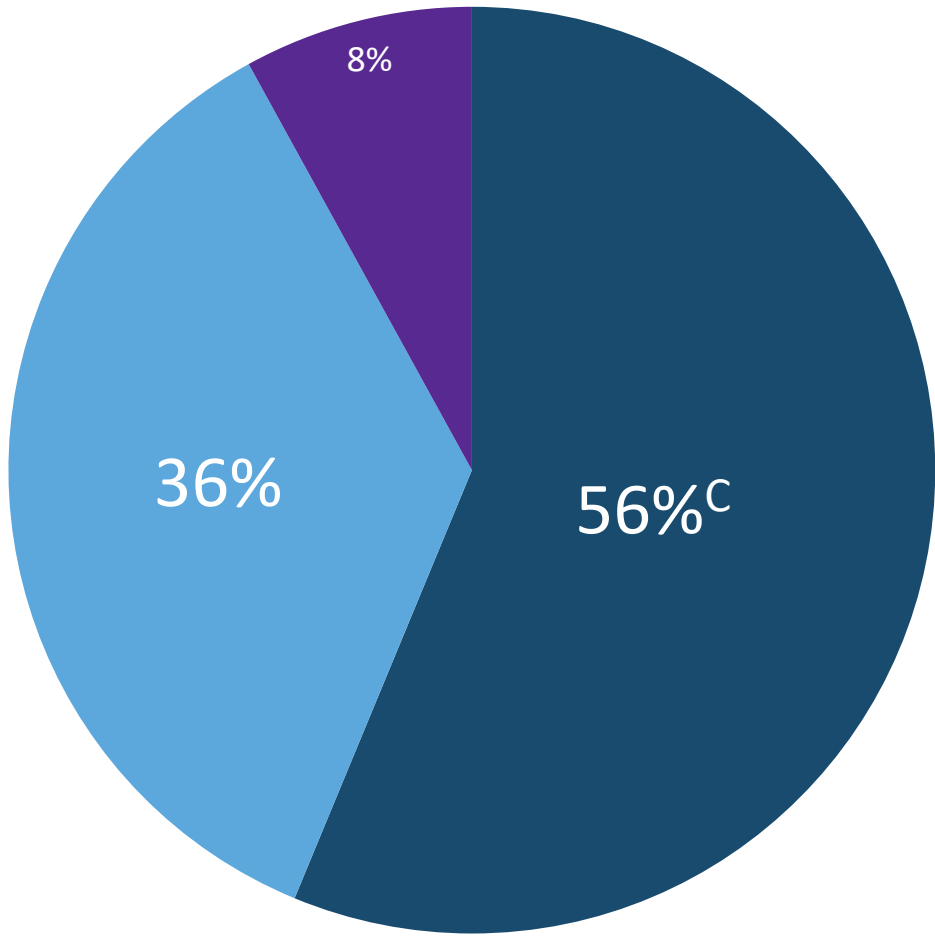
Note: Full data can be found in the appendix.

Base: Total Respondents

# Among these occasional/lapsed/potential anglers, African-Americans express the most interest in going fishing in the next 2 years



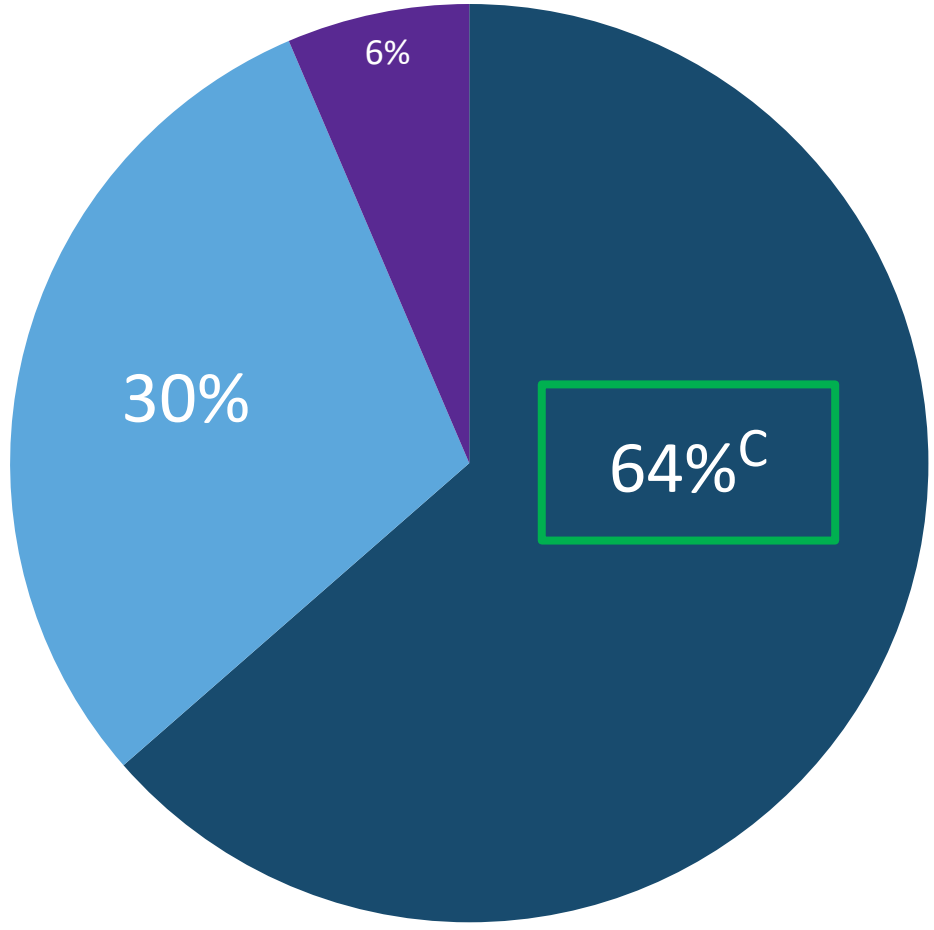
Hispanics (A)



Very interested Somewhat interested Not at all interested



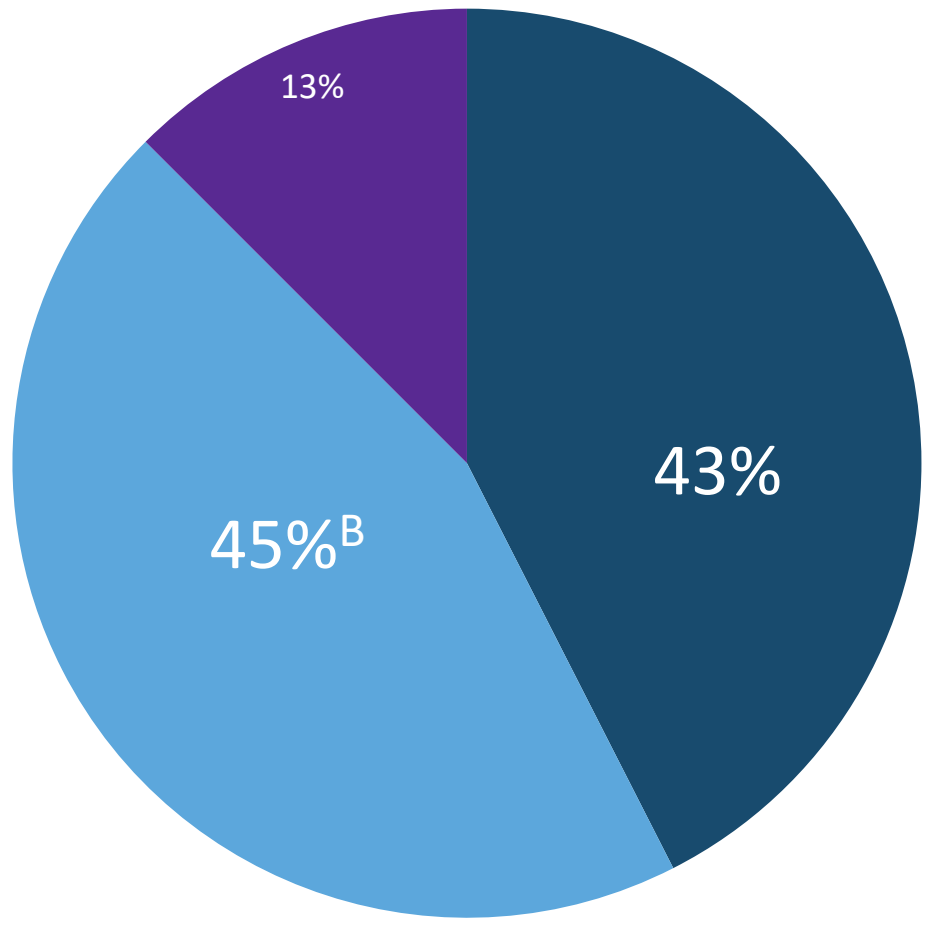
African-Americans (B)



Very interested Somewhat interested Not at all interested



Asian-Americans (C)



Very interested Somewhat interested Not at all interested

S11.If you had the opportunity, how interested would you be in going fishing in the next 2 years?

Base: Total Respondents (N=400 Hispanic; N=280 AA; N=120 Asian)

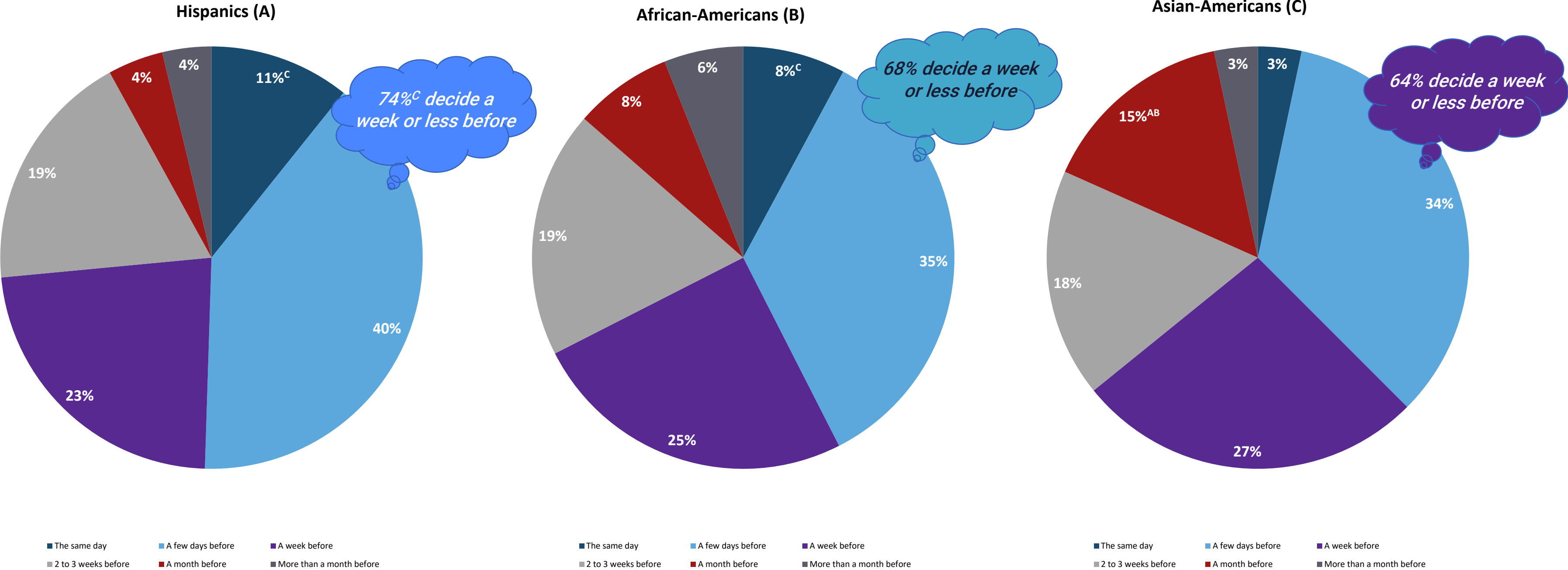
A/B/C = Statistically higher than the indicated group and the 95% confidence level





# Hispanics are the least likely to plan their outdoor activities in advance with almost three-fourths of them planning a week or less before

## How Far In Advance Typically Plan Outdoor Activities



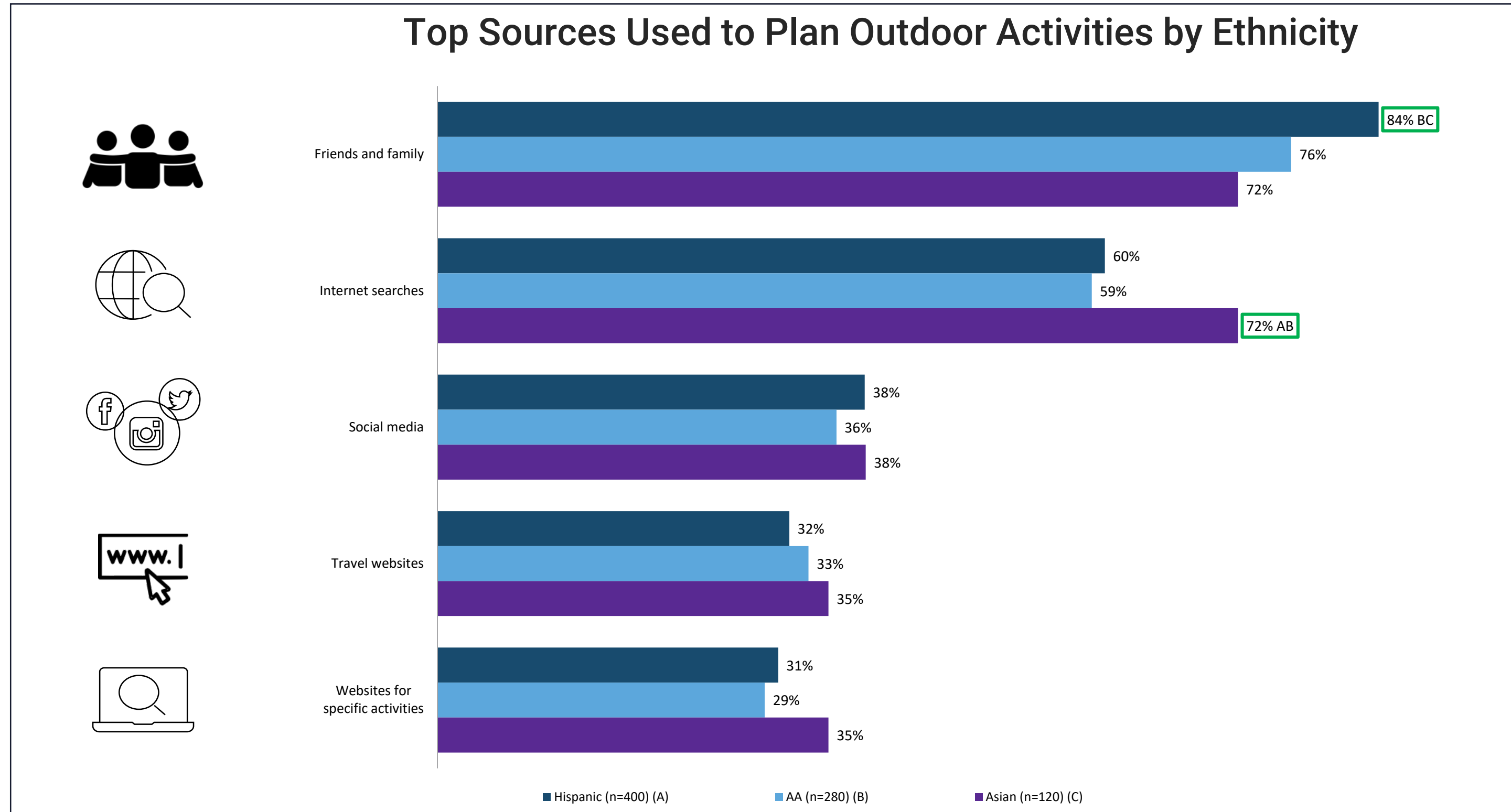
A2. Which of the following best describes how far in advance you typically plan your outdoor activities?

Base: Total Respondents (N=400 Hispanic; N=280 AA; N=120 Asian)

A/B/C = Statistically higher than the indicated group and the 95% confidence level

# All ethnic groups rely on friends and family as their primary source of ideas for outdoor activities, especially for Hispanics since word of mouth referrals are a critical component of the culture.

- Asian-Americans are equally likely to search the internet as they are to use friends and family for planning.



A3. Which of the following, if any, do you use to help plan and decide outdoor activities?

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

Facebook and Instagram are also the most popular websites visited across all ethnicities.

- African-Americans are most likely to visit Fishing.com, and Hispanics are most likely to visit VamosAPescar.org.



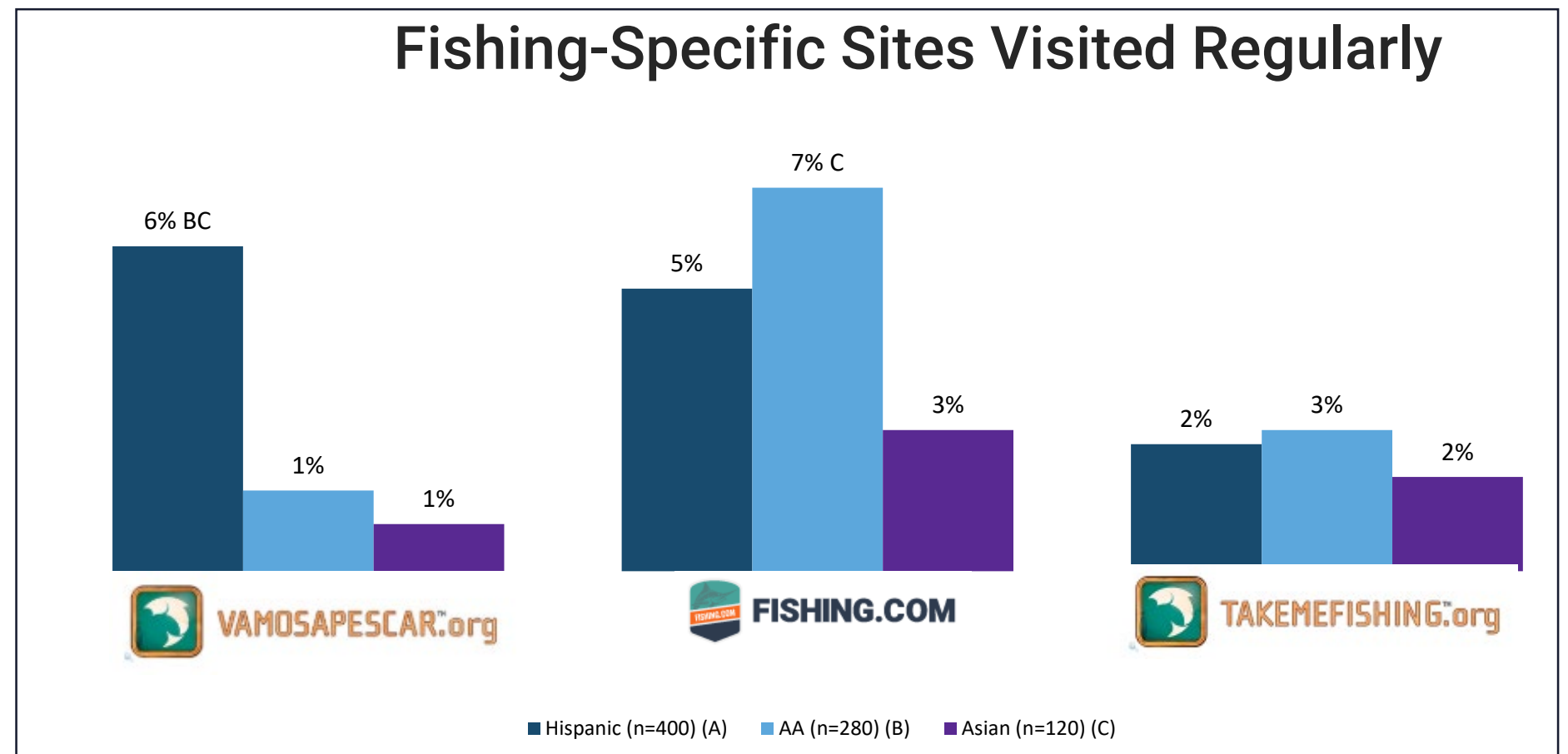
## Facebook is Visited Most Often

Hispanic = 56% / AA = 54% / Asian = 58%



## Instagram is Visited Second Most Often

Hispanic = 54% / AA = 48% / Asian = 48%



Base: Total Respondents

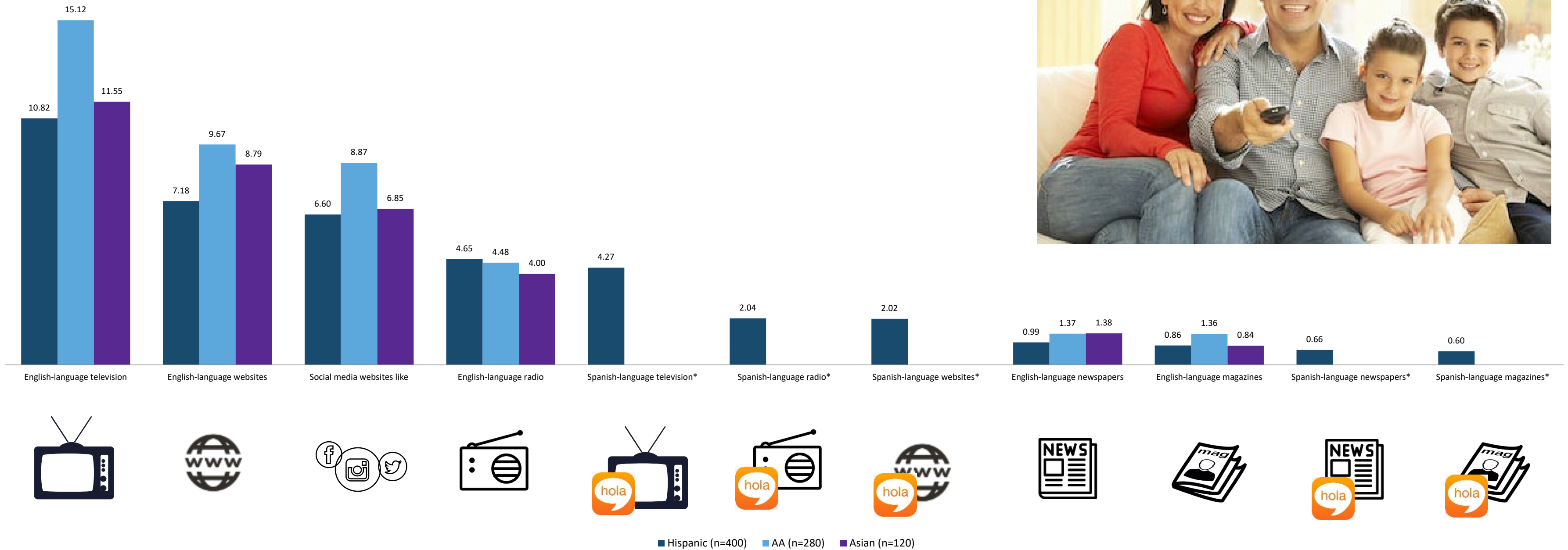
A/B/C = Statistically higher than the indicated group and the 95% confidence level

C3. For the sites/apps listed below, please indicate how often you visit each one.

Full data is in the appendix.

# Hispanic anglers consume a mix of English and Spanish media

Average Weekly Media Hours



C1. In an average week, how many hours would you say you watch, listen to or read the following types of media?

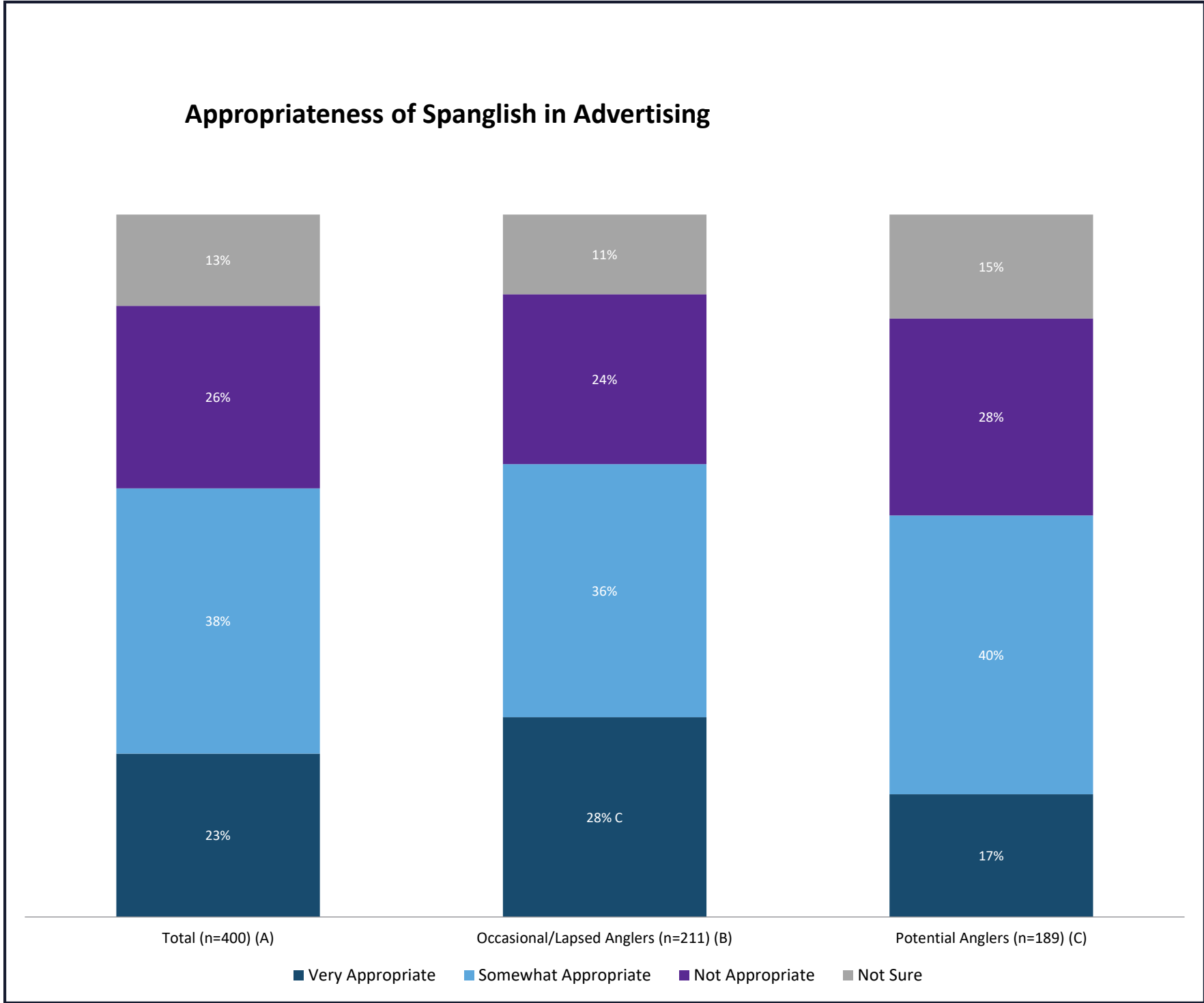
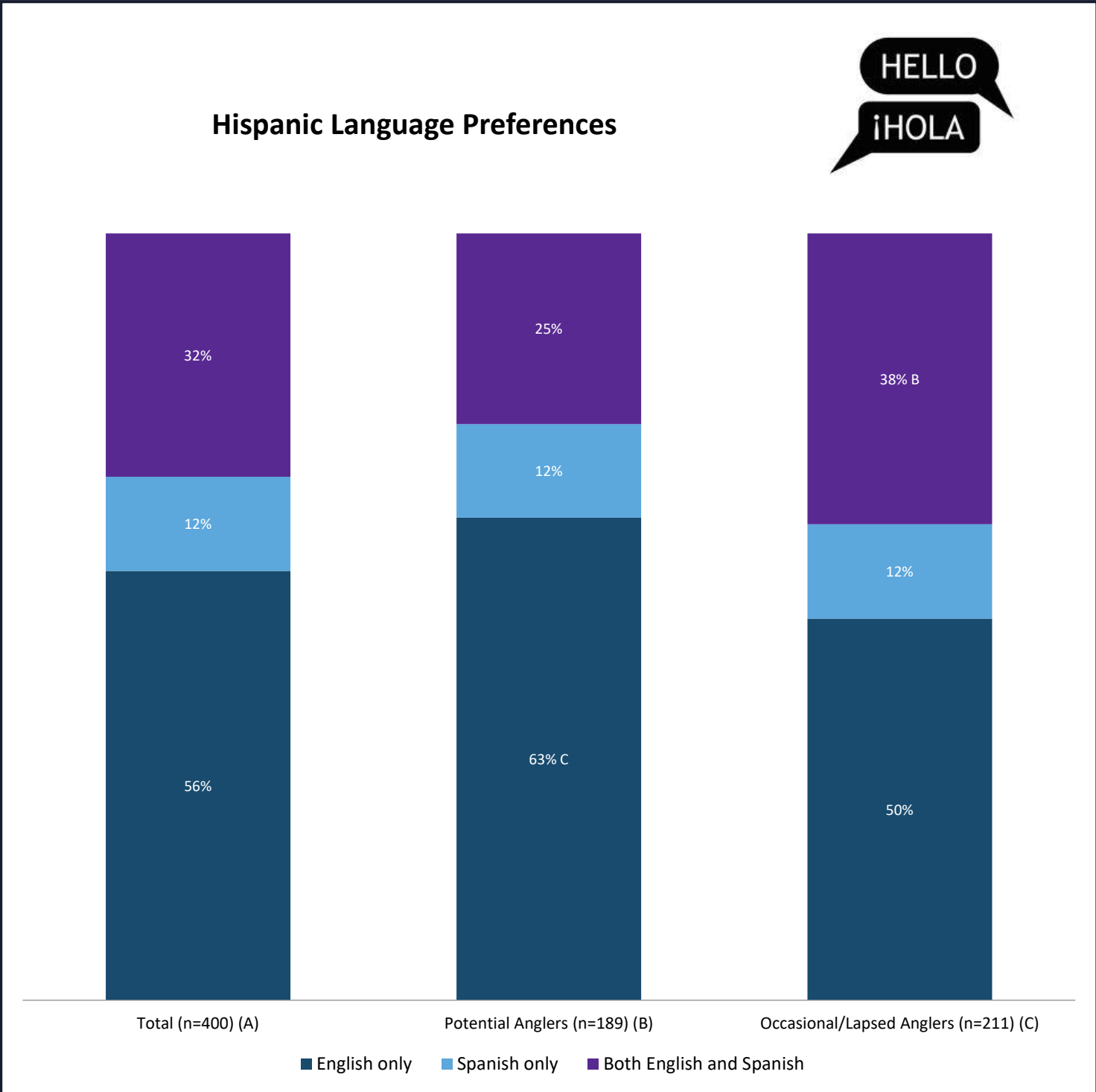
\* Spanish media was asked among Hispanic respondents only.

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level



# Hispanic anglers want to be reached through both English and Spanish media but do not find Spanglish to be very appropriate, indicating that separate language campaigns would be needed



C4. In what language would you prefer to get information about boating and fishing?

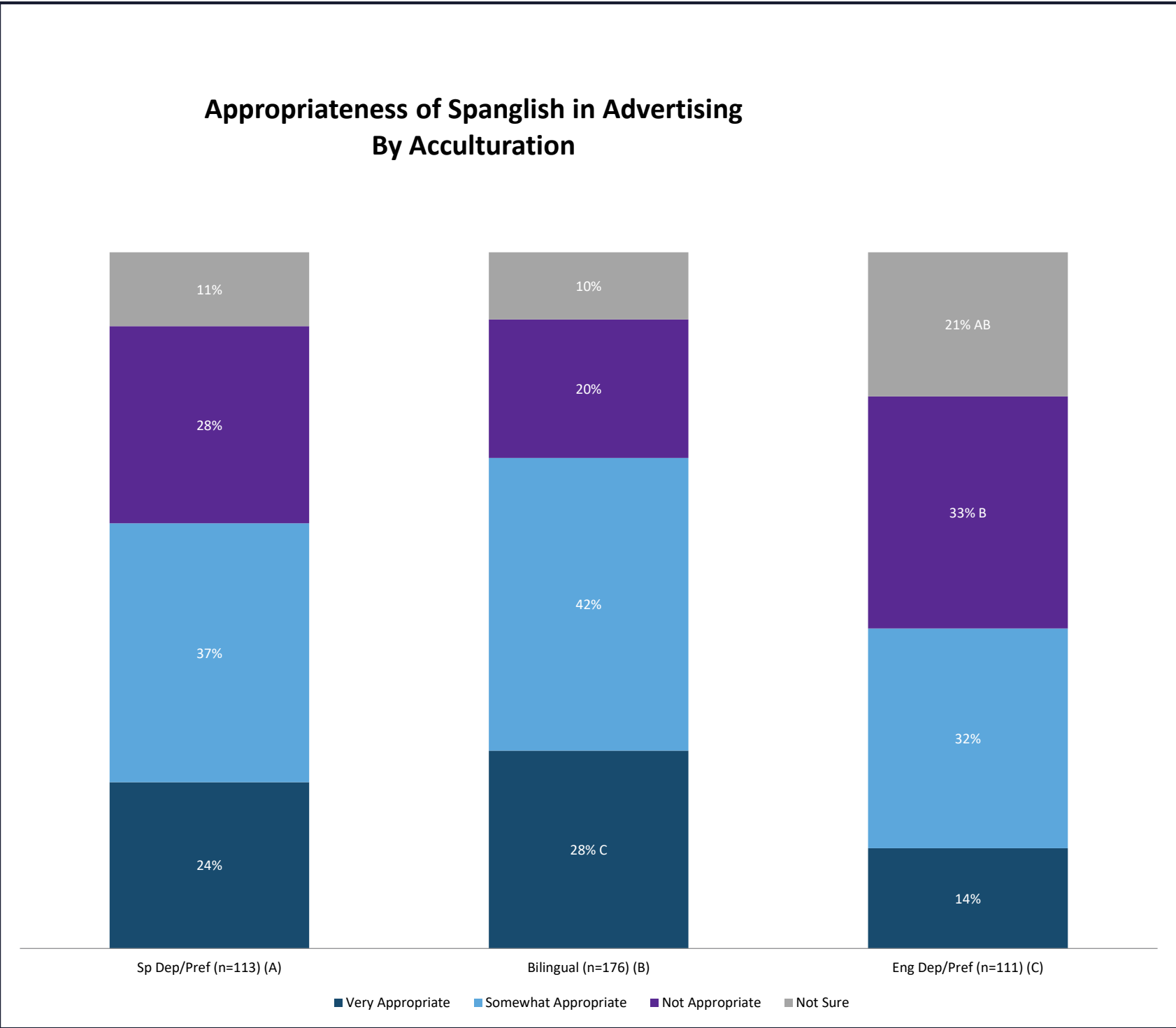
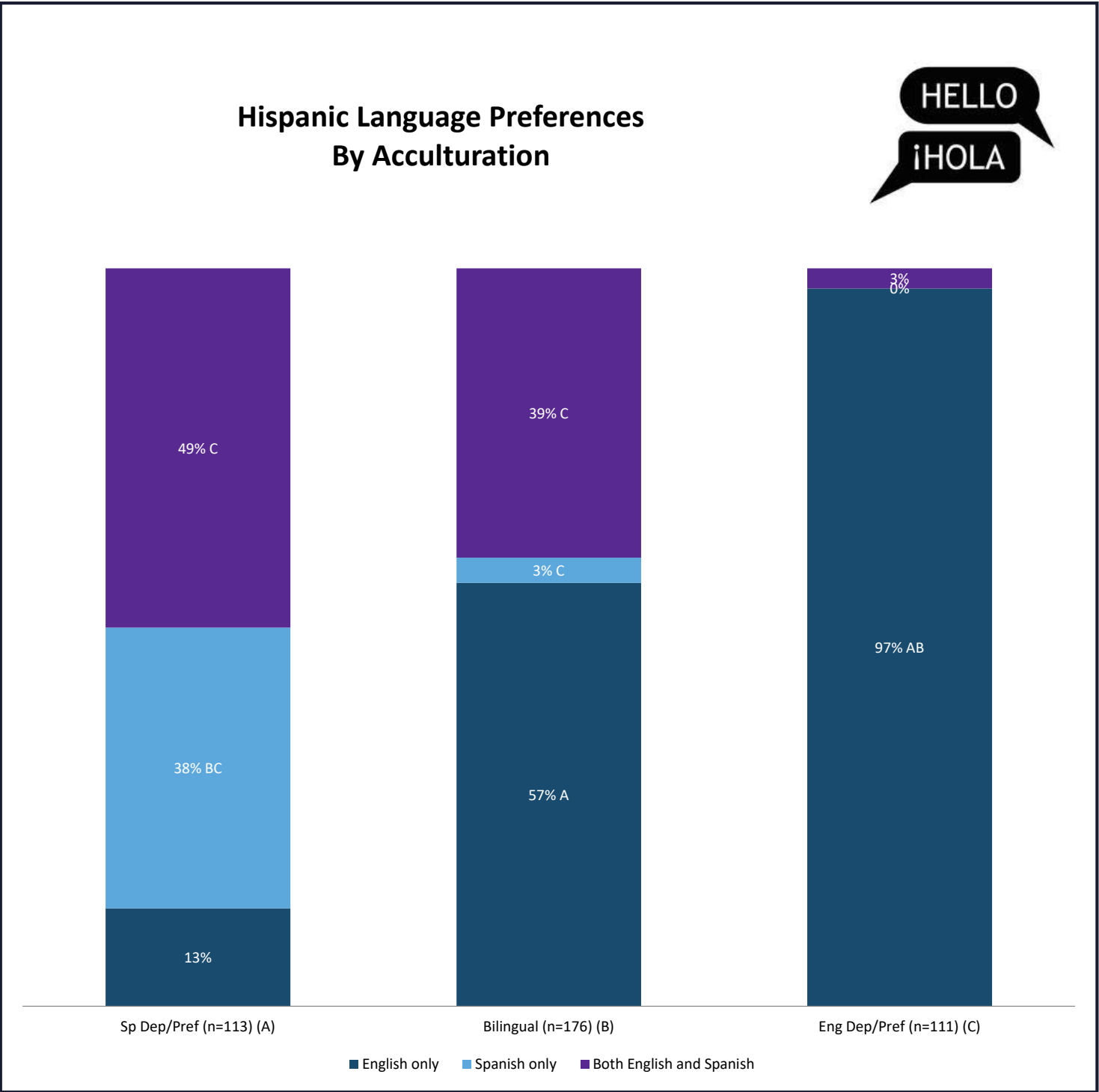
C5. How appropriate do you feel it is to use Spanglish in advertising?

Base: Hispanic Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

# Not surprisingly, English-dominant Hispanics want to be reached through English media while Spanish-dominant Hispanics prefer both Spanish and English or only Spanish media

- Bilinguals prefer English or both English and Spanish.
- Spanglish is not considered very appropriate across acculturation levels.



C4. In what language would you prefer to get information about boating and fishing?

C5. How appropriate do you feel it is to use Spanglish in advertising?

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

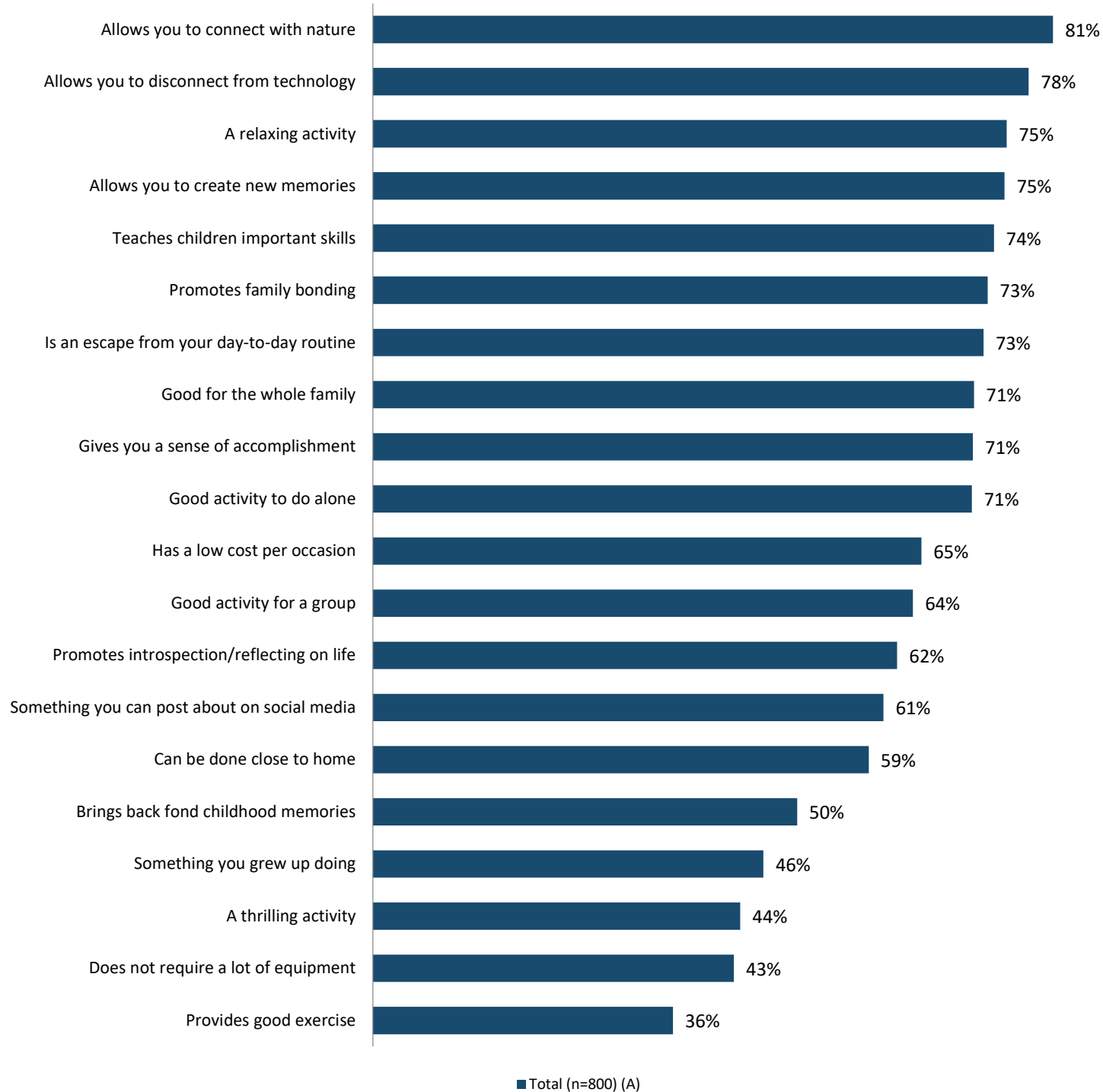
# APPENDIX

<b>By Angler Types</b>	<b>Page 38</b>
<b>By Boating Participation</b>	<b>Page 44</b>
<b>By Ethnicity</b>	<b>Page 46</b>
<b>By Gender and Age</b>	<b>Page 54</b>

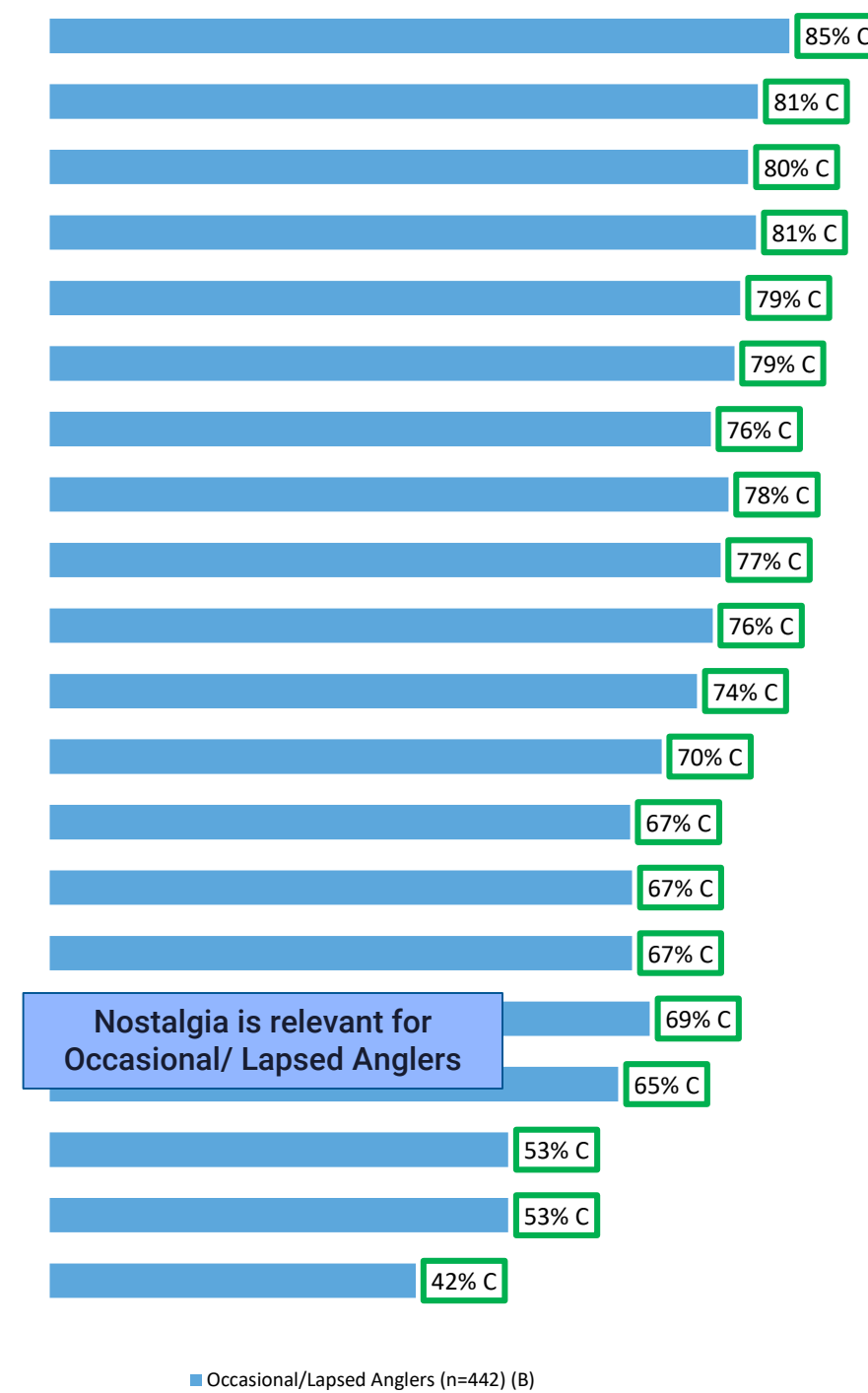
**Occasional/Lapsed Anglers are more positive about FISHING than are Potential Anglers. However, the majority of both groups of Anglers feel that FISHING allows them to connect with nature, disconnect from technology, and escape. It's considered relaxing, memorable, and teaches children life skills while promoting family bonding.**

## Phrases Describing Fishing

### Total

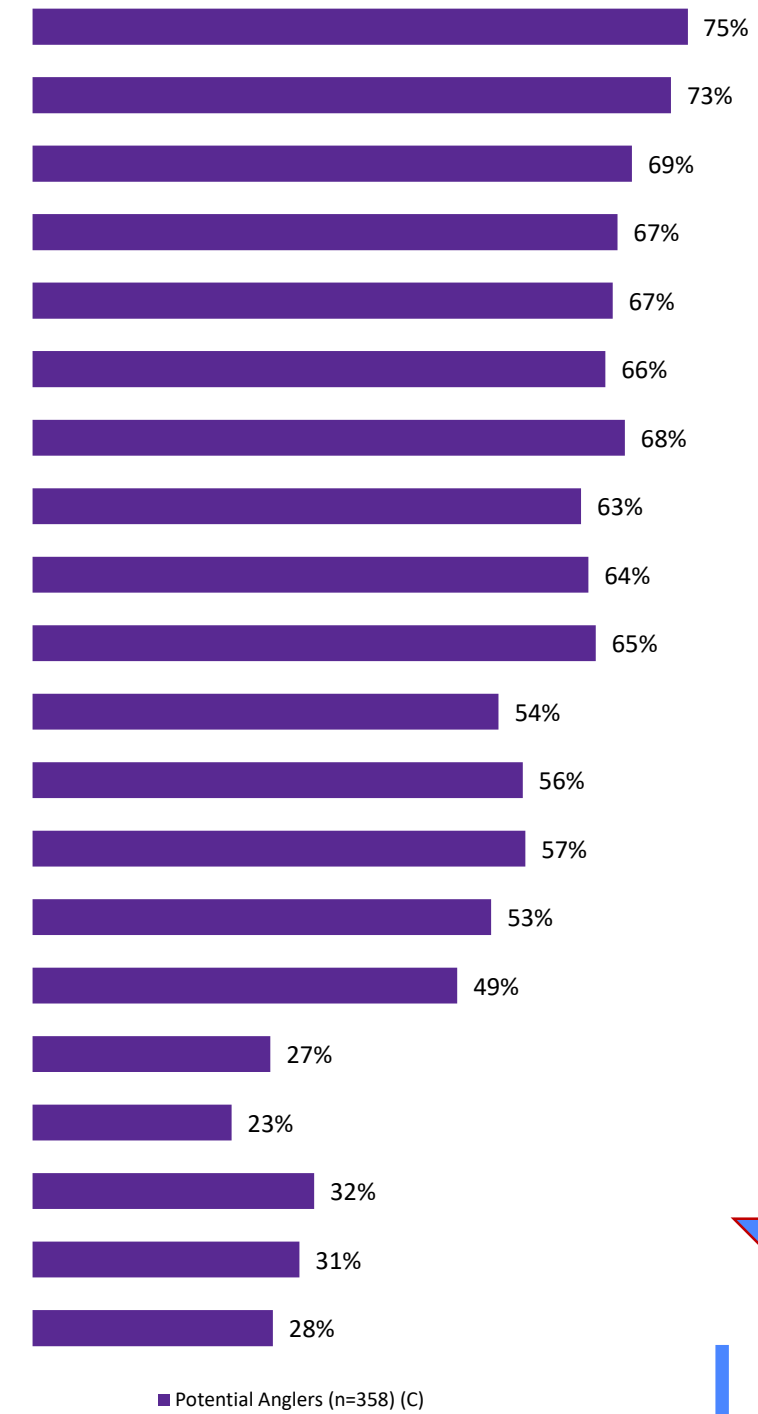


### Occasional/Lapsed Anglers



Nostalgia is relevant for Occasional/ Lapsed Anglers

### Potential Anglers



**2 out of 3 Agree**

**Less than 1 out of 3 Agree**

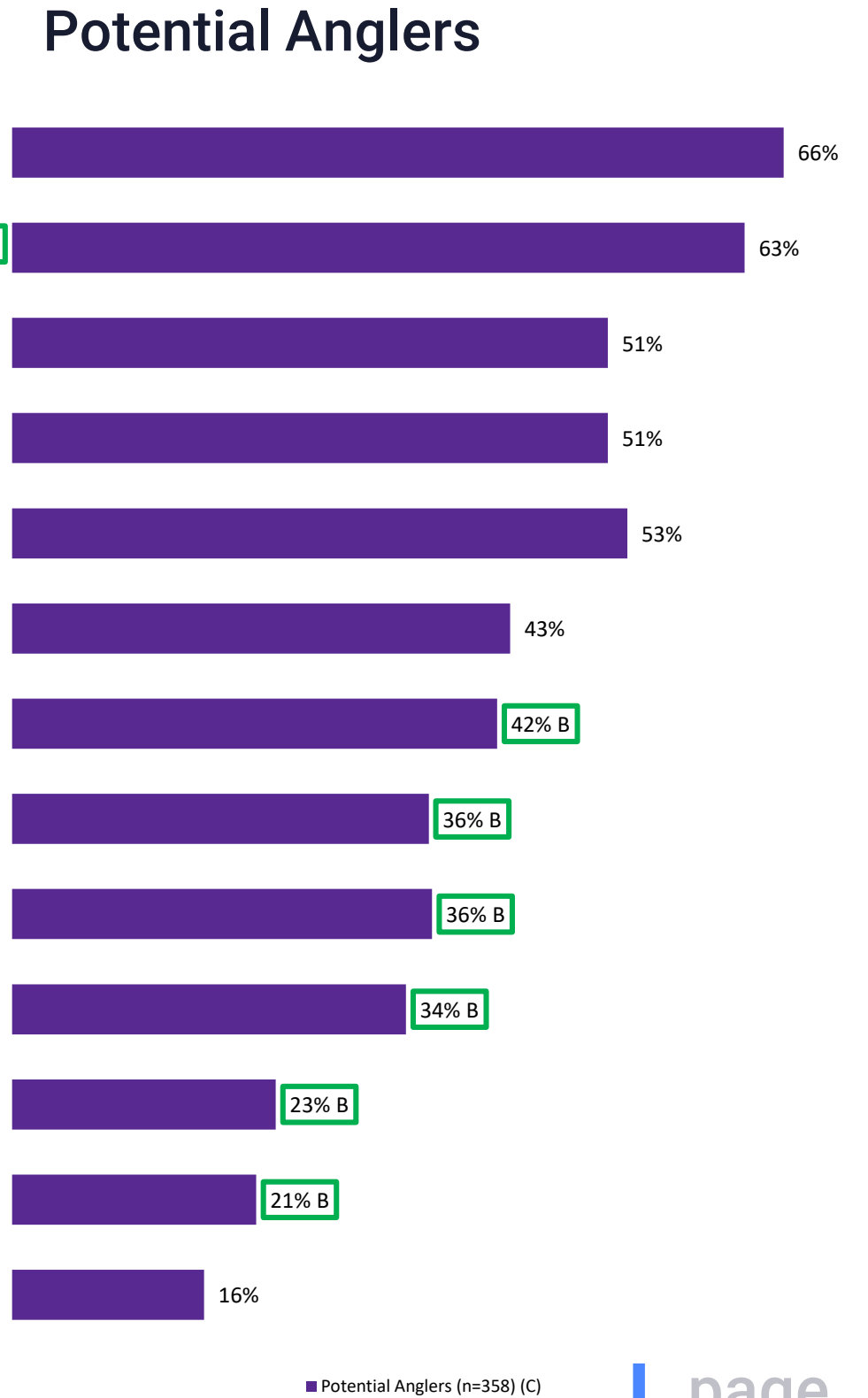
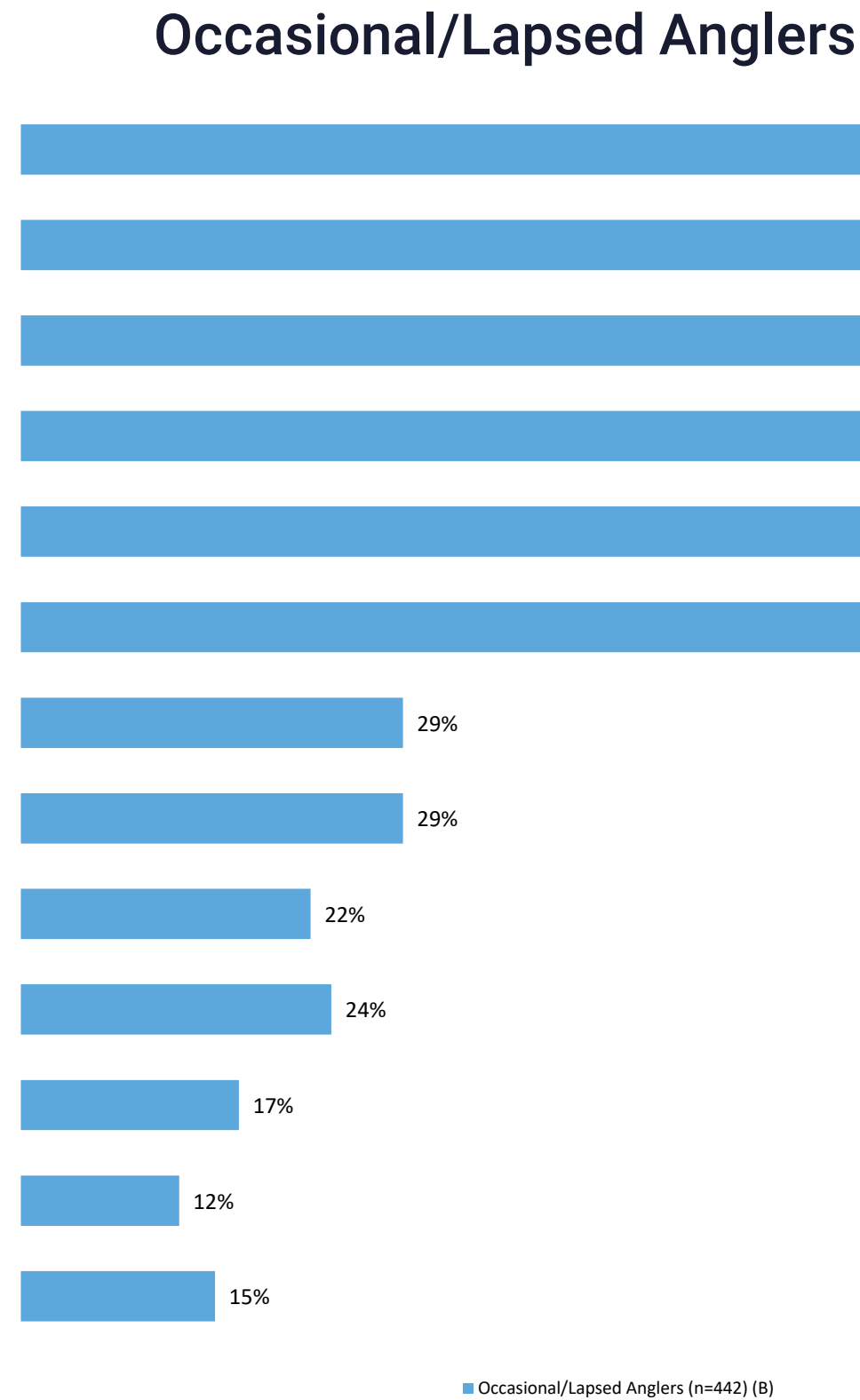
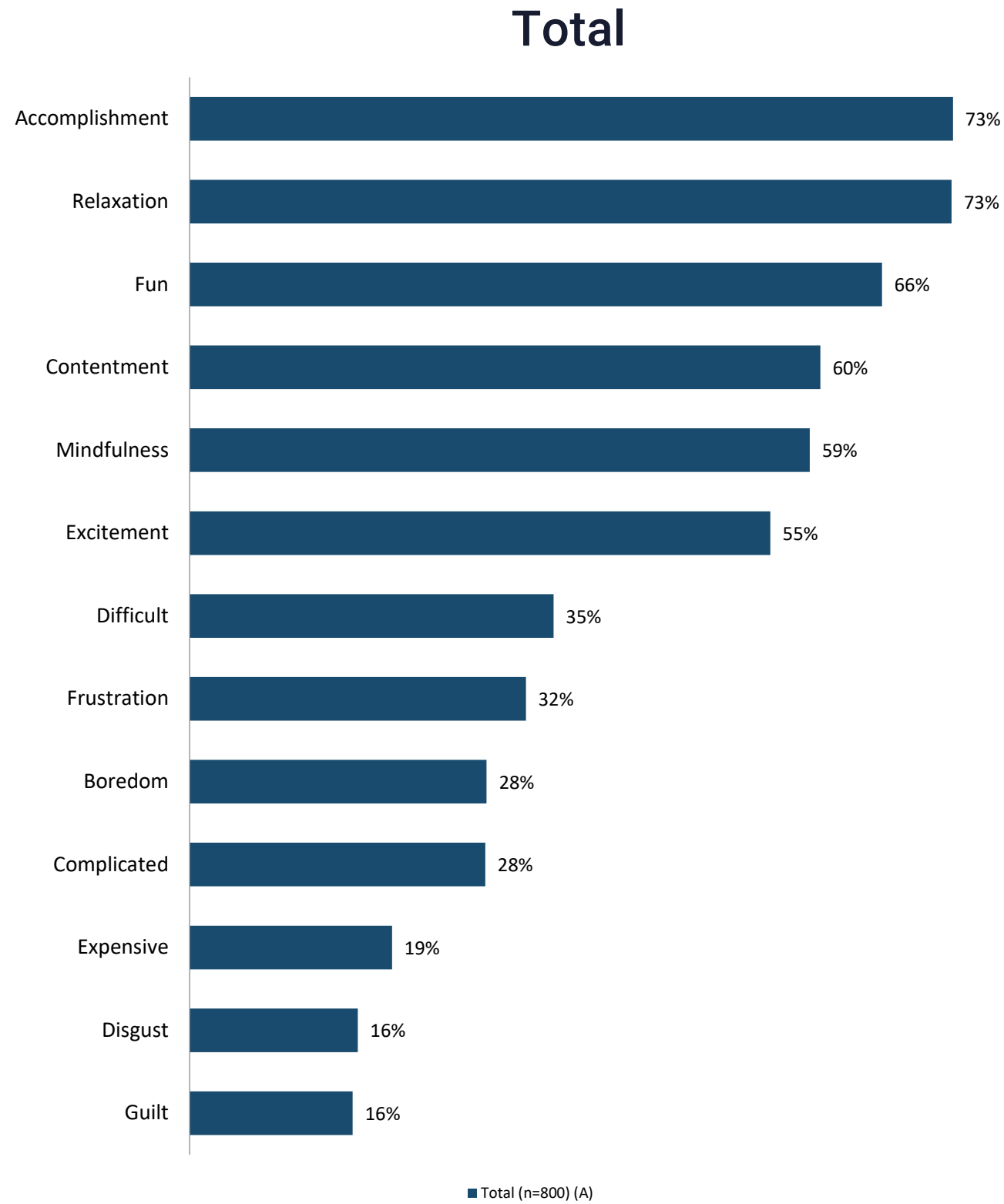
B1. Which of the following phrases describe fishing and boating?

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

# emotions associated with fishing

## Emotions Describing Fishing



B2. Which of the following emotions describe fishing and boating?

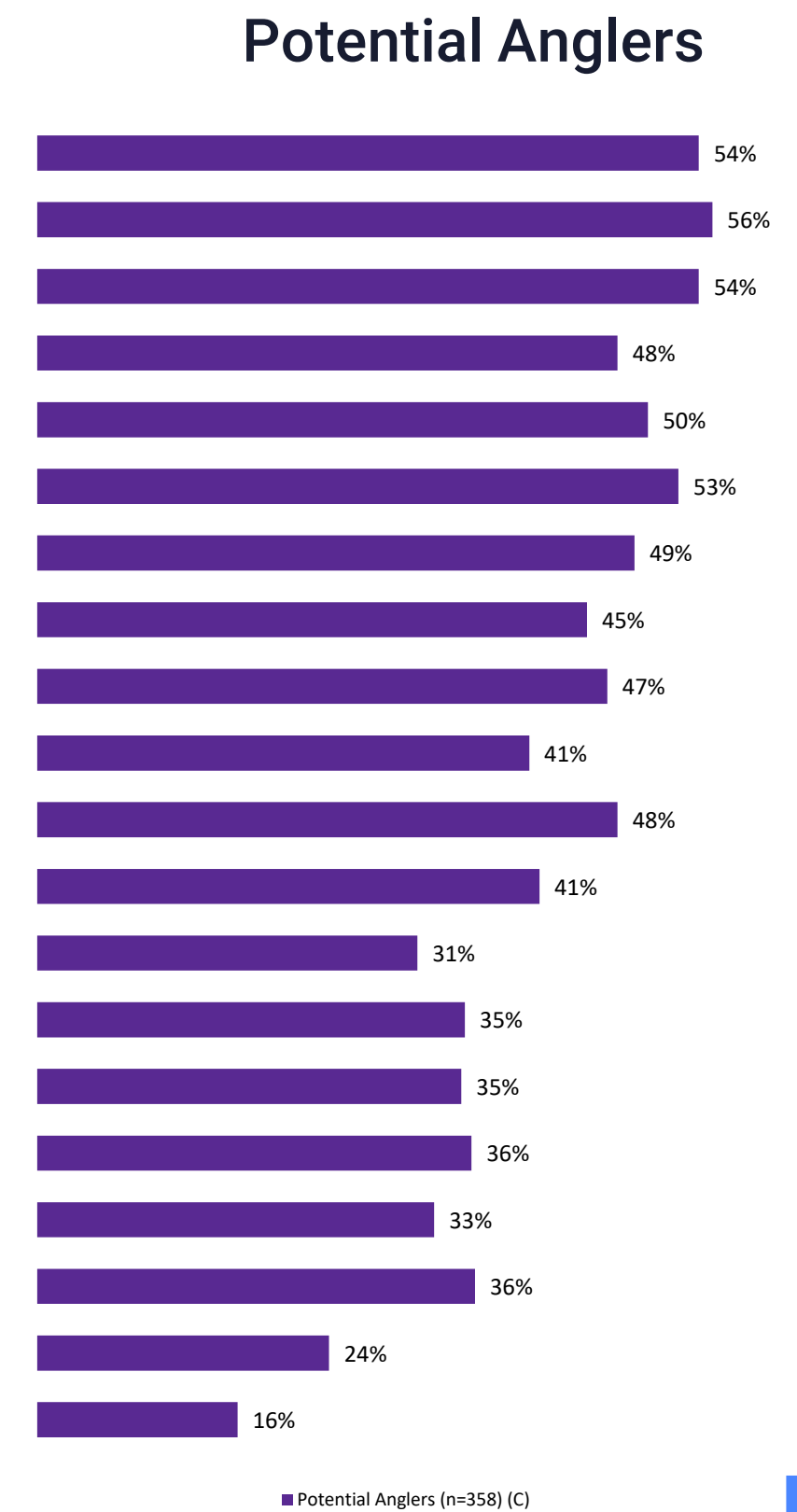
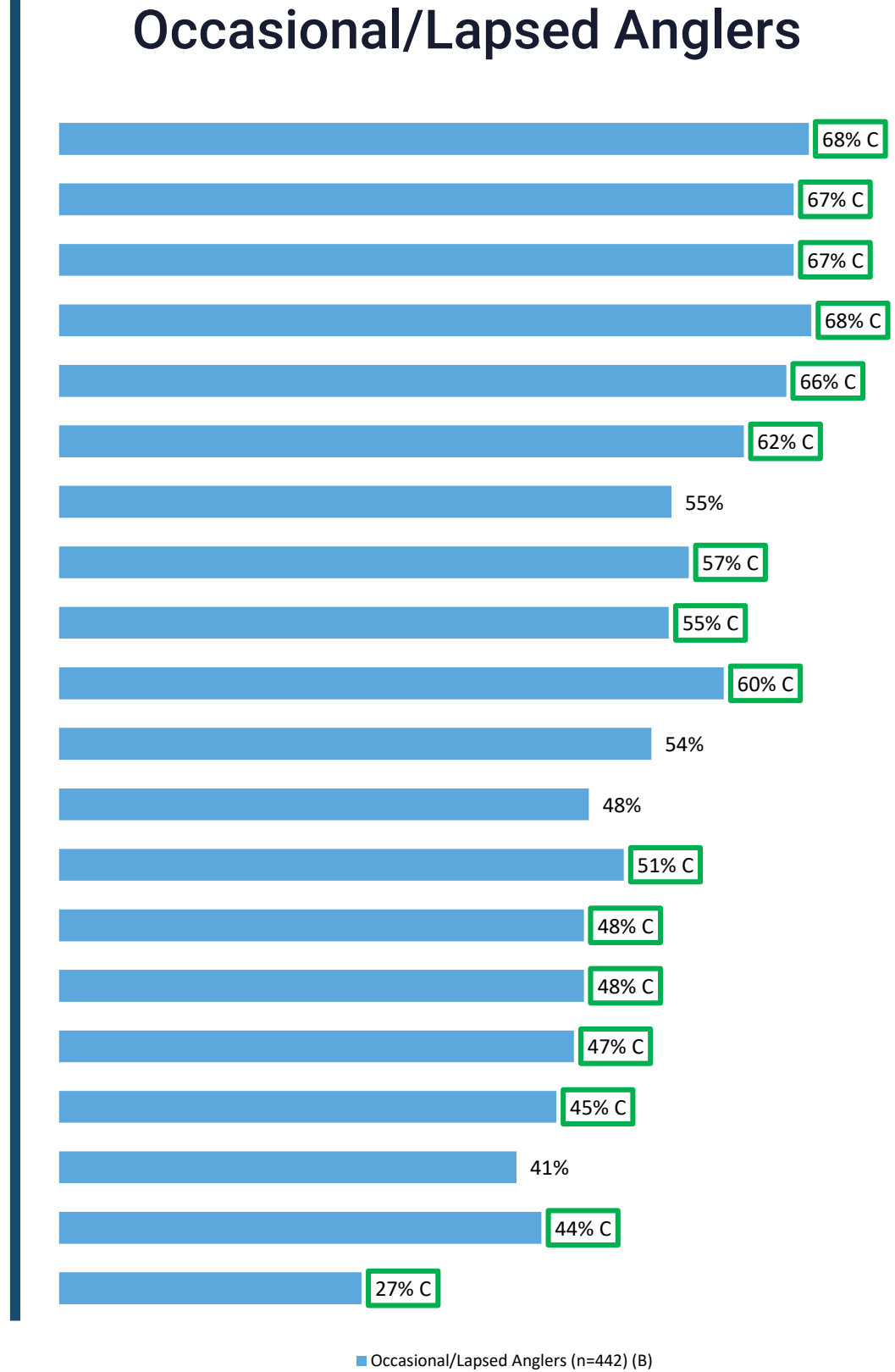
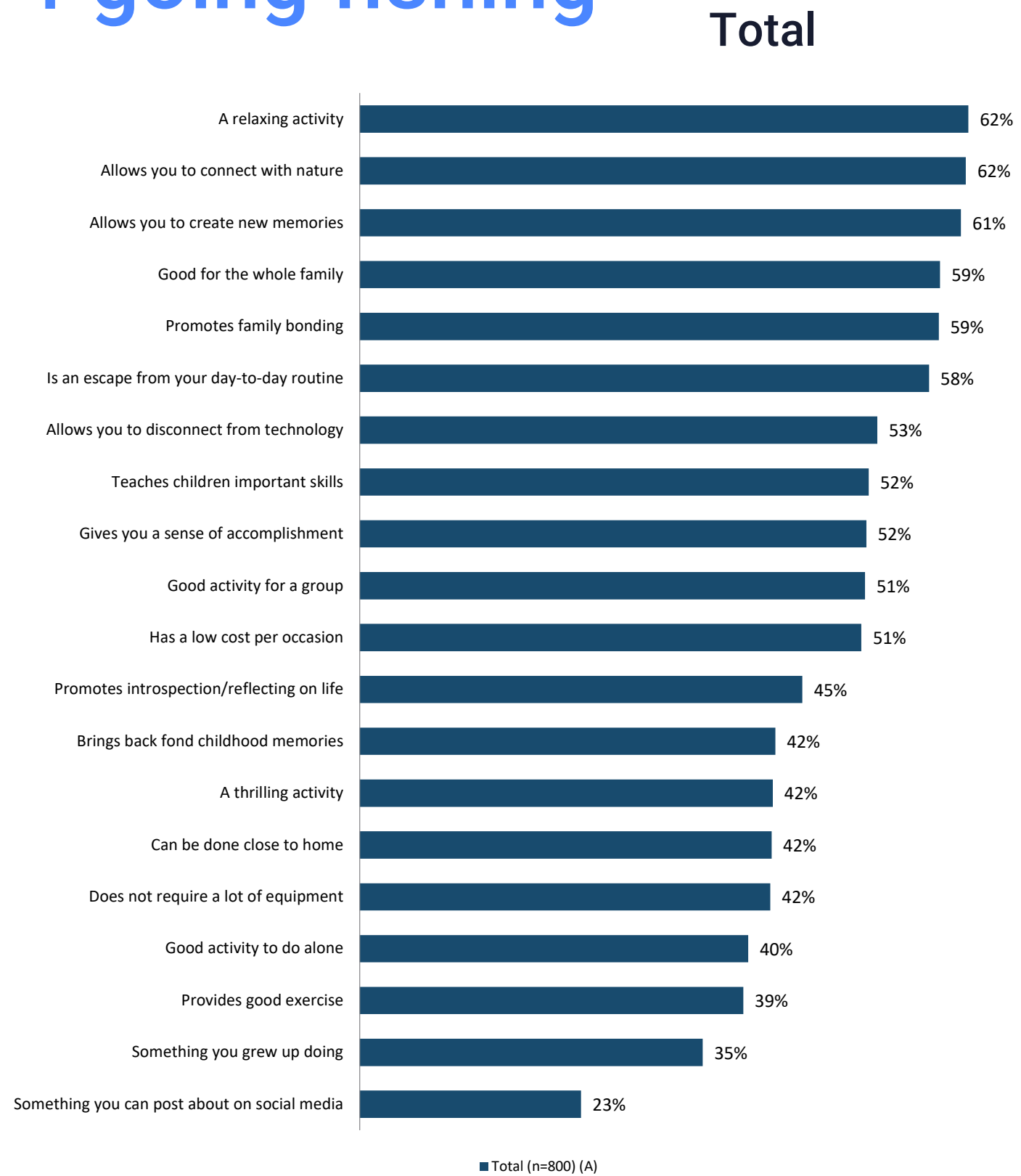
Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level



# reasons for going fishing

## Reasons for Going Fishing



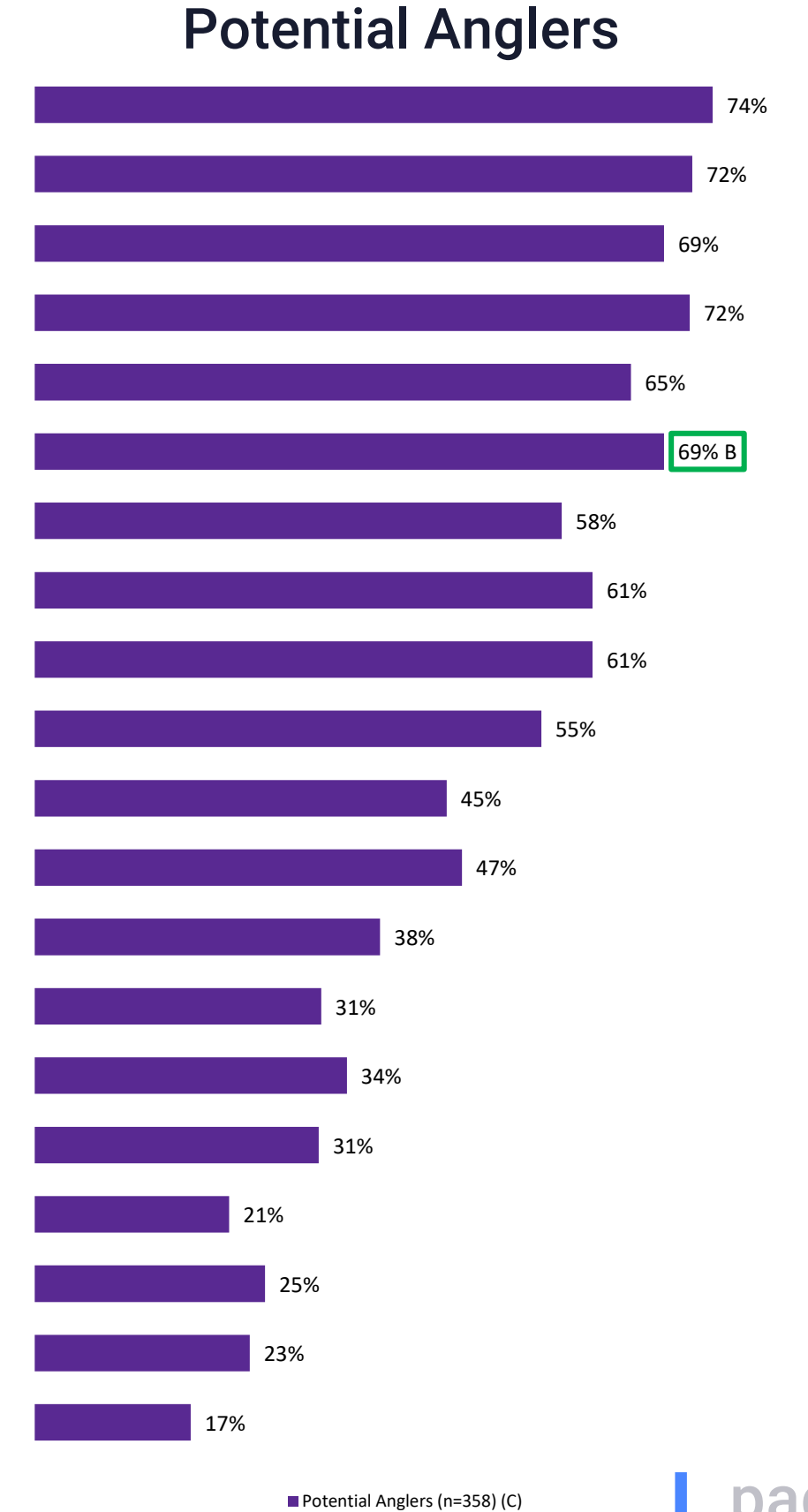
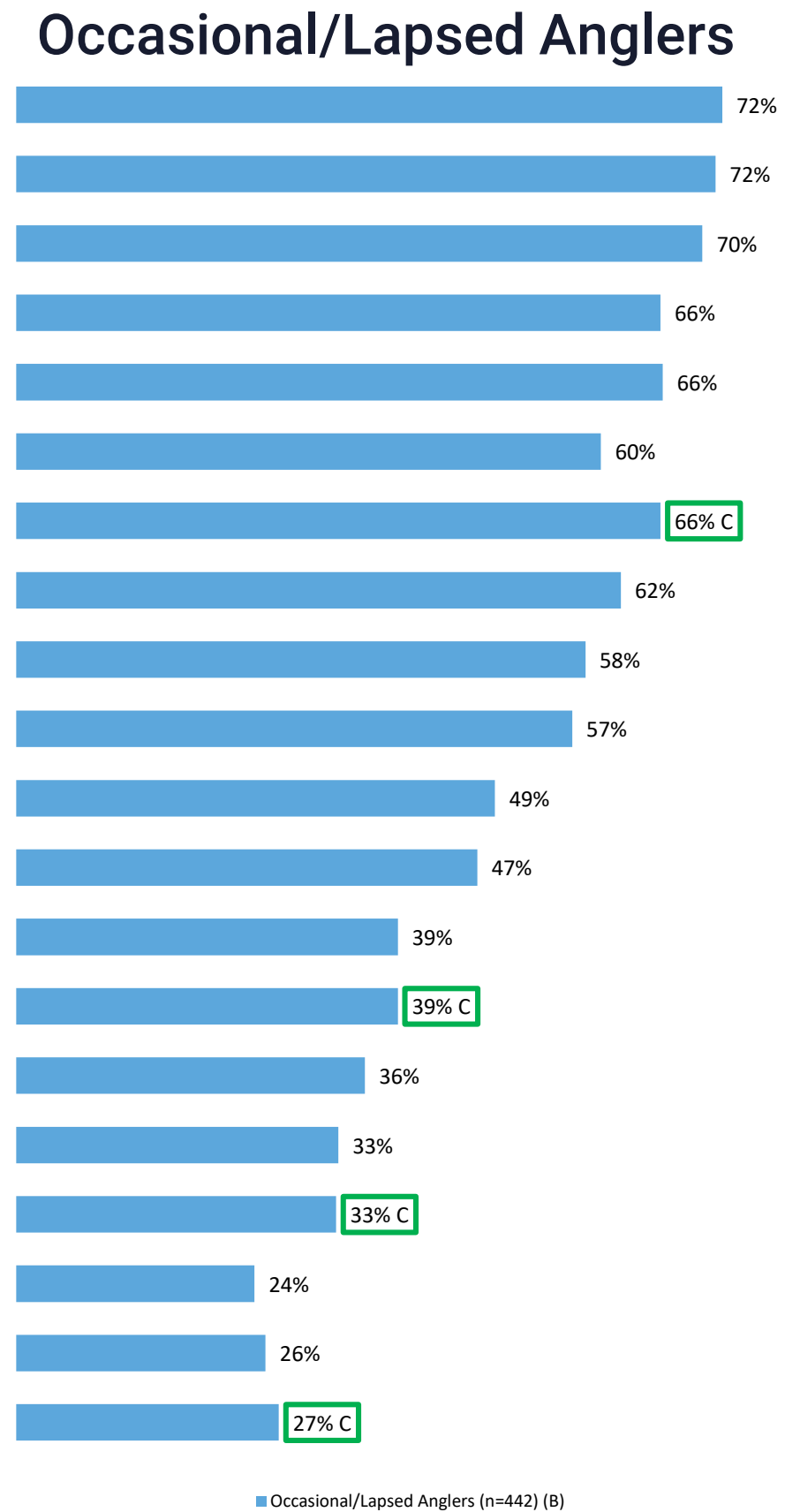
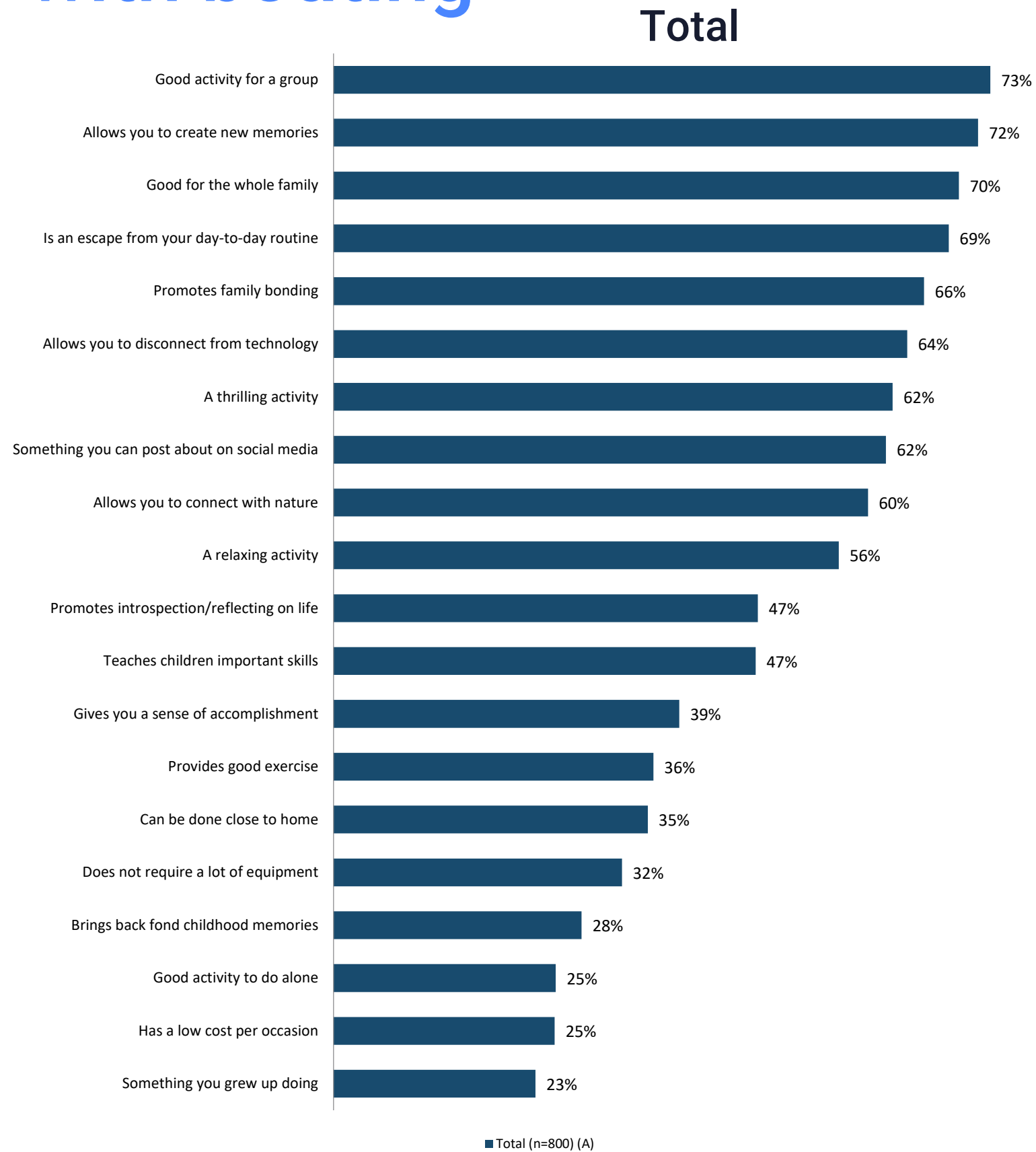
Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

B3.How important are each of the following reasons for going fishing?

# phrases associated with boating

## Phrases Describing Boating

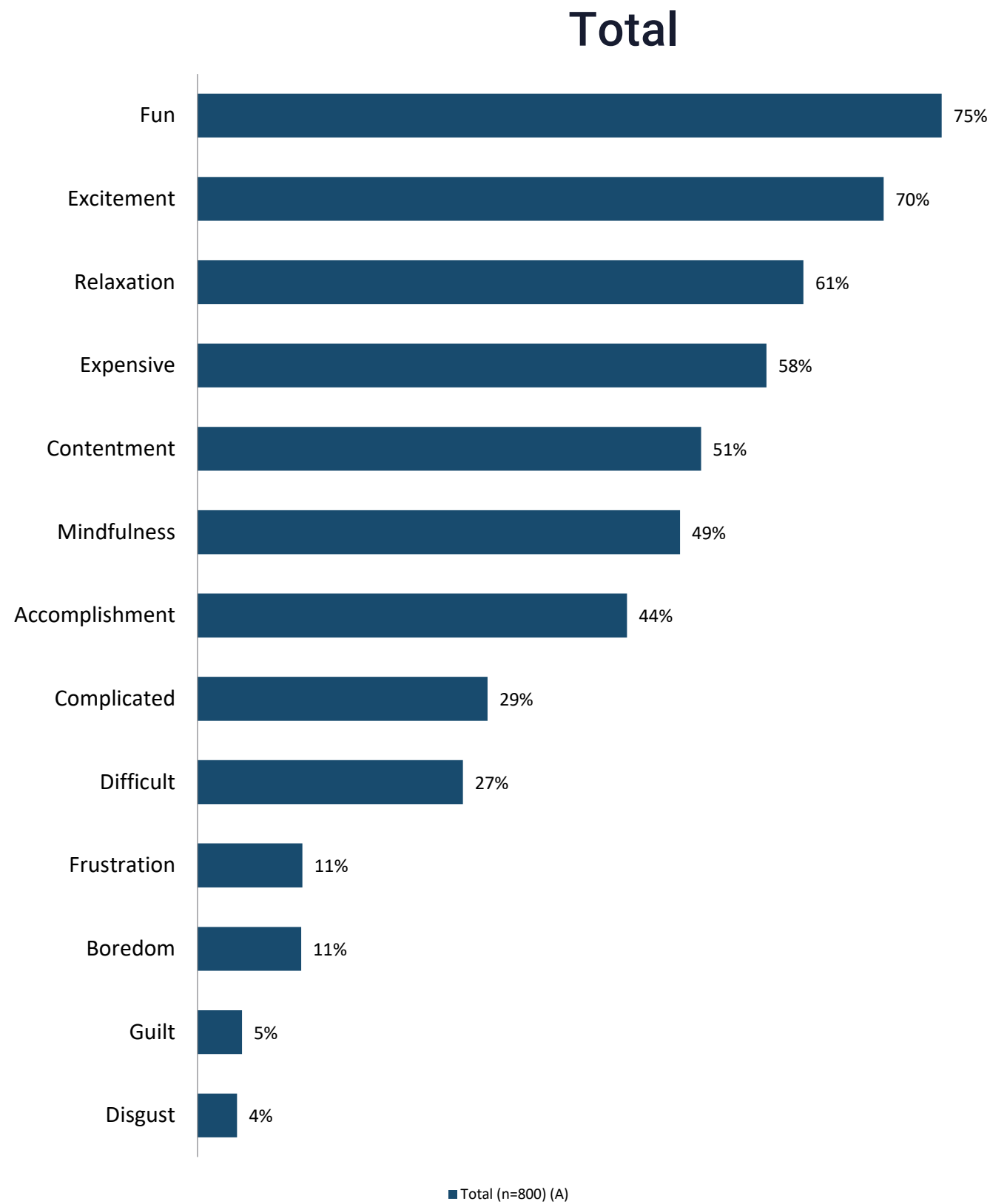


B1. Which of the following phrases describe fishing and boating?

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

# emotions associated with boating

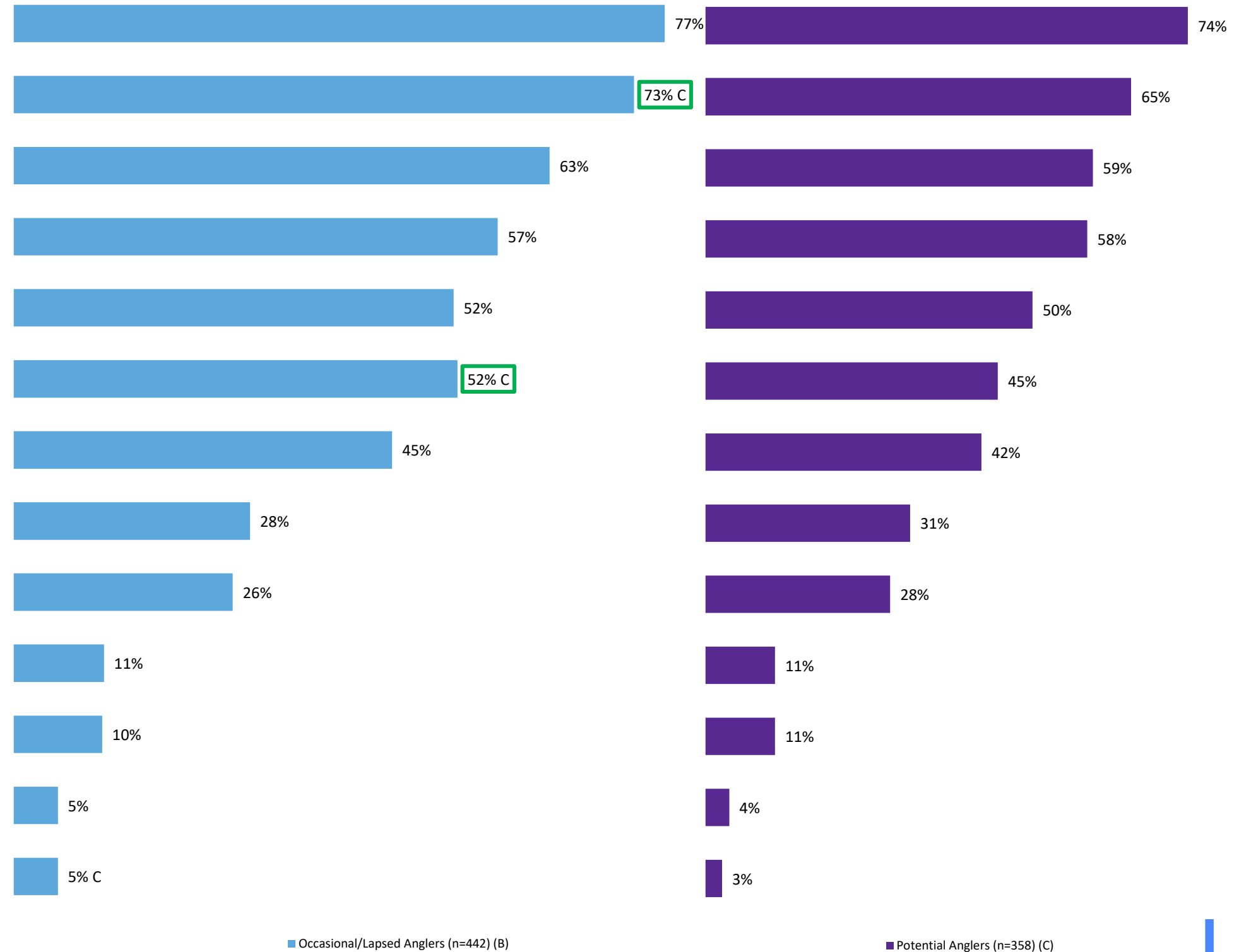


## Emotions Describing Boating



### Occasional/Lapsed Anglers

### Potential Anglers

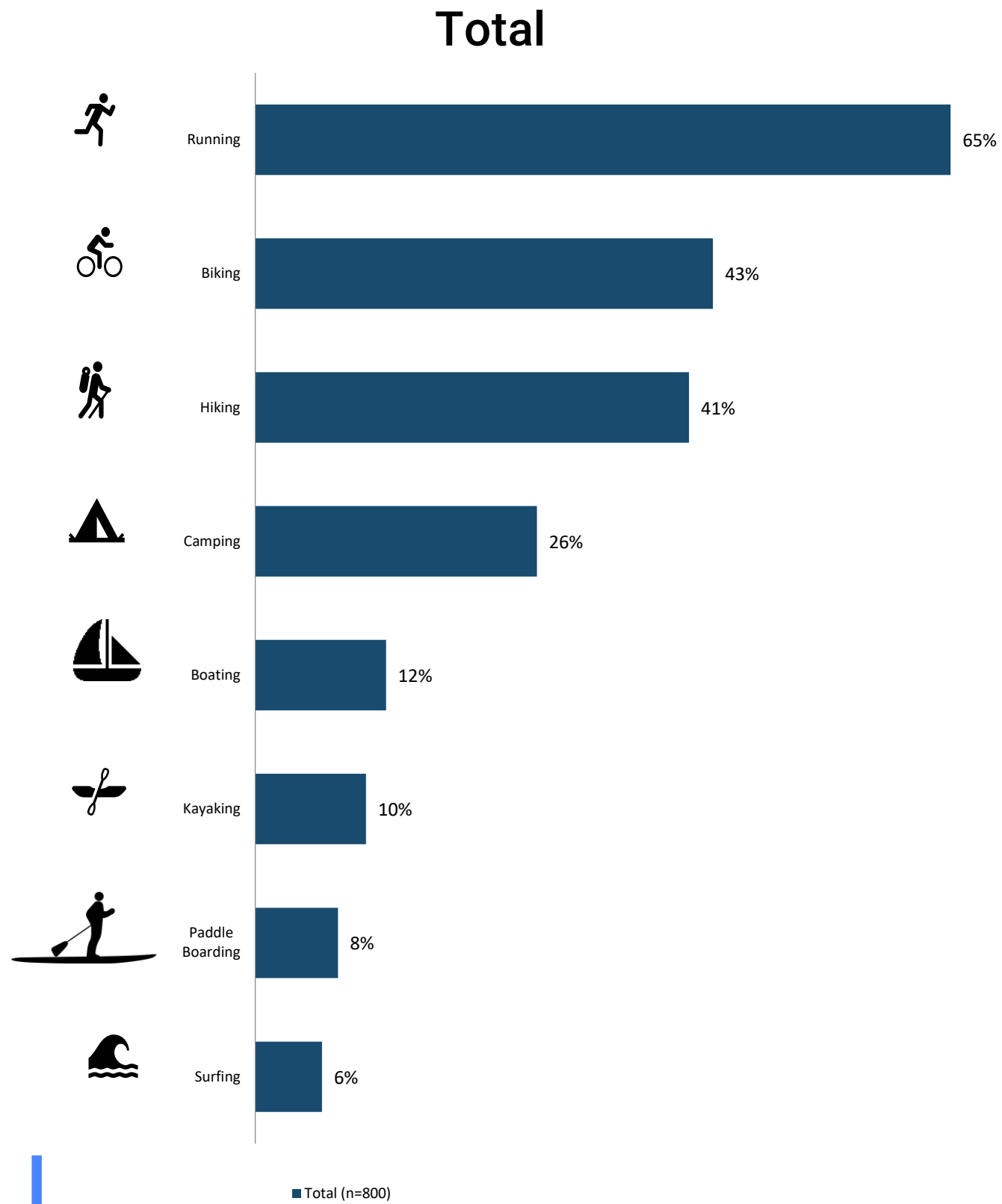


B2. Which of the following emotions describe fishing and boating?

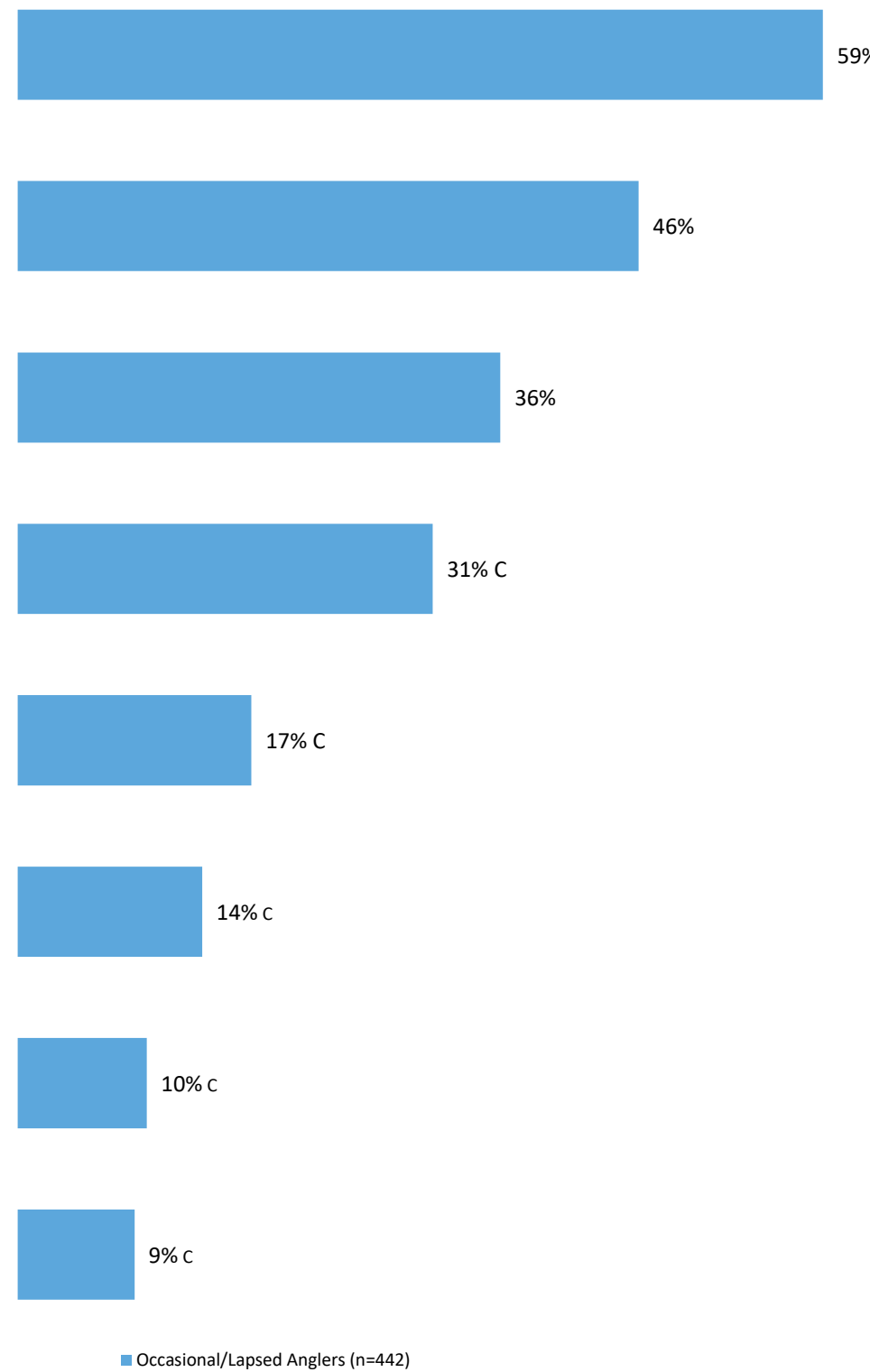
Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

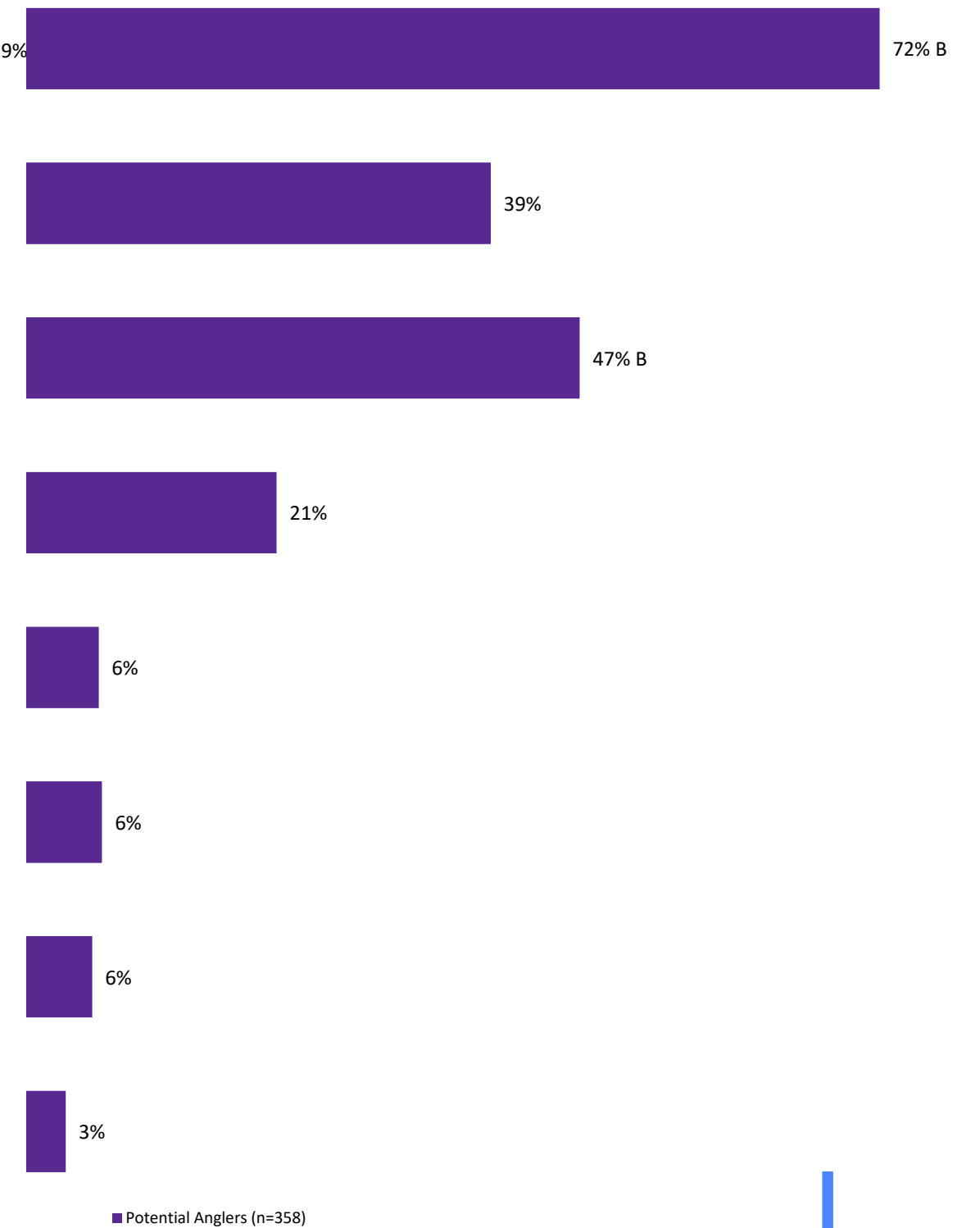
# other activities currently participating in



### Occasional/Lapsed Anglers



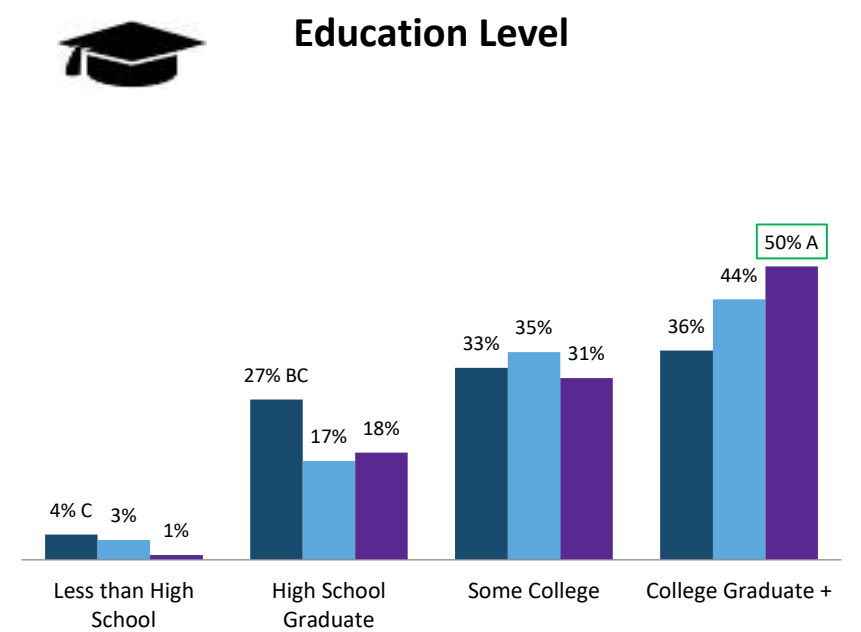
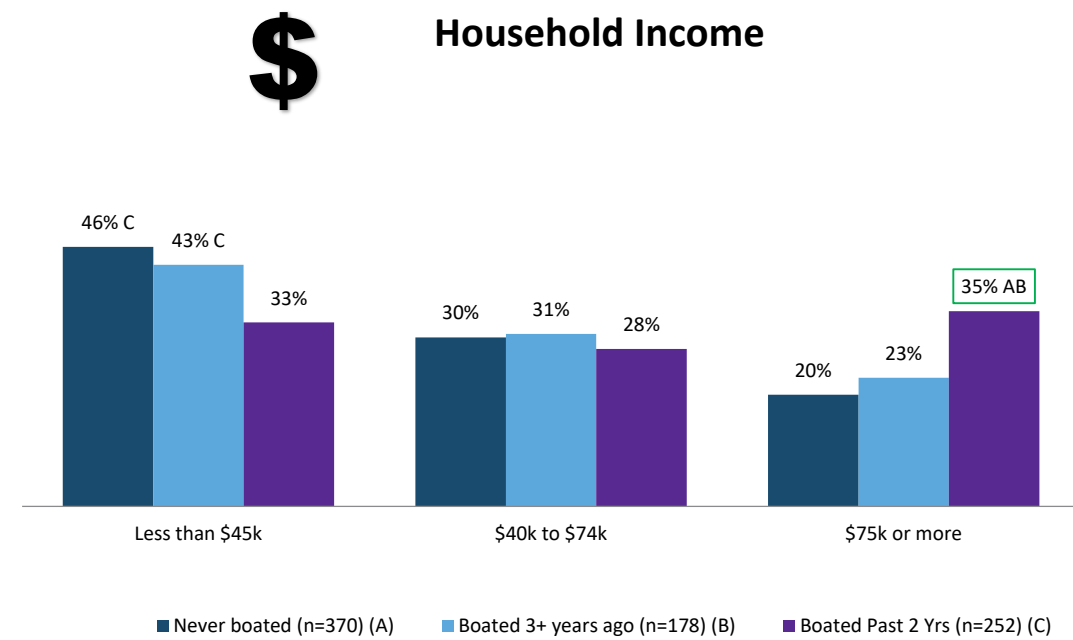
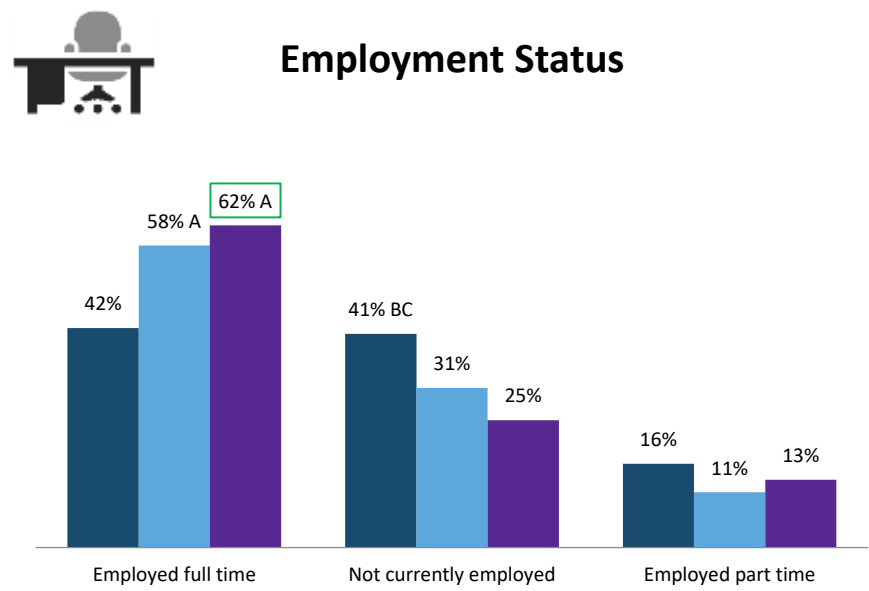
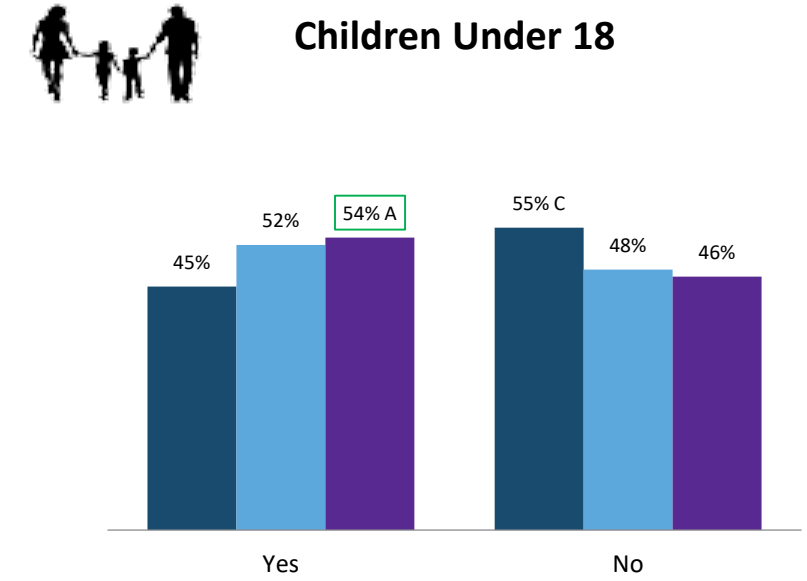
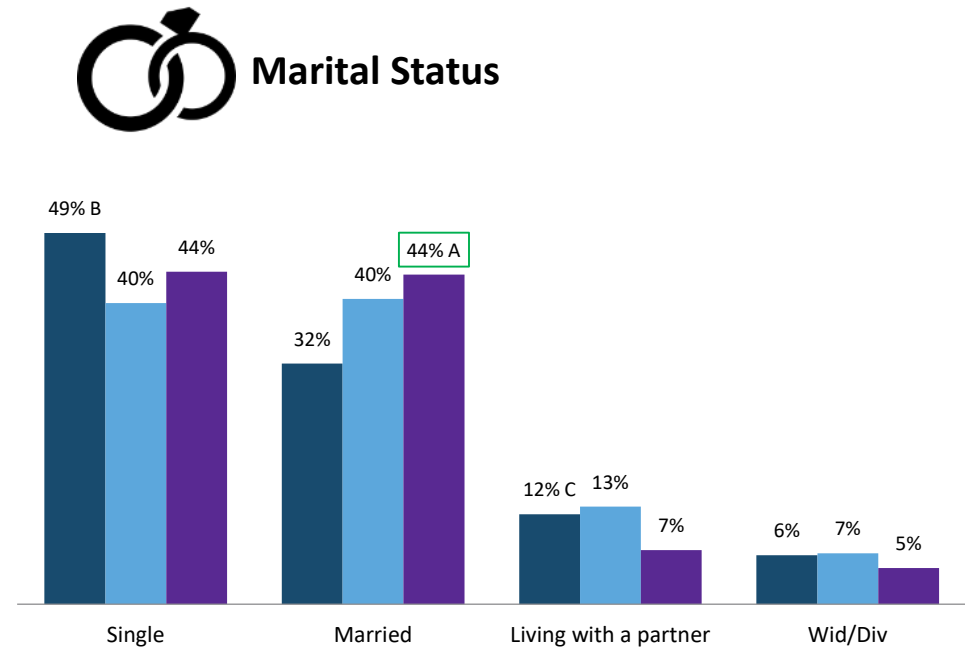
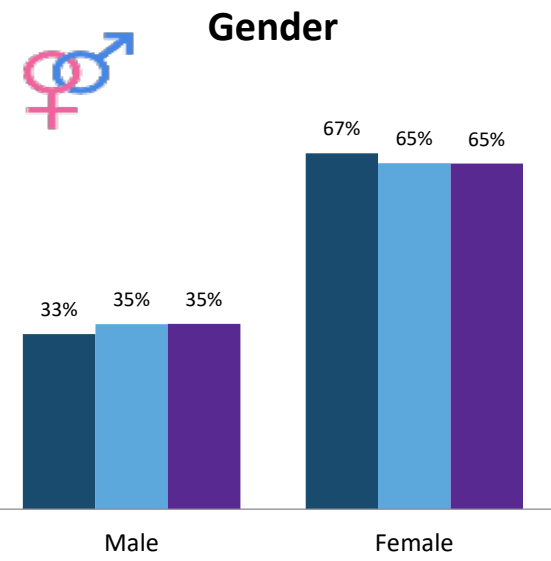
### Potential Anglers



S10.What is your level of participation in the following activities? (Currently participate)

A/B/C = Statistically higher than the indicated group and the 95% confidence level

# demographics by boating population



Based on Various Demographic Questions

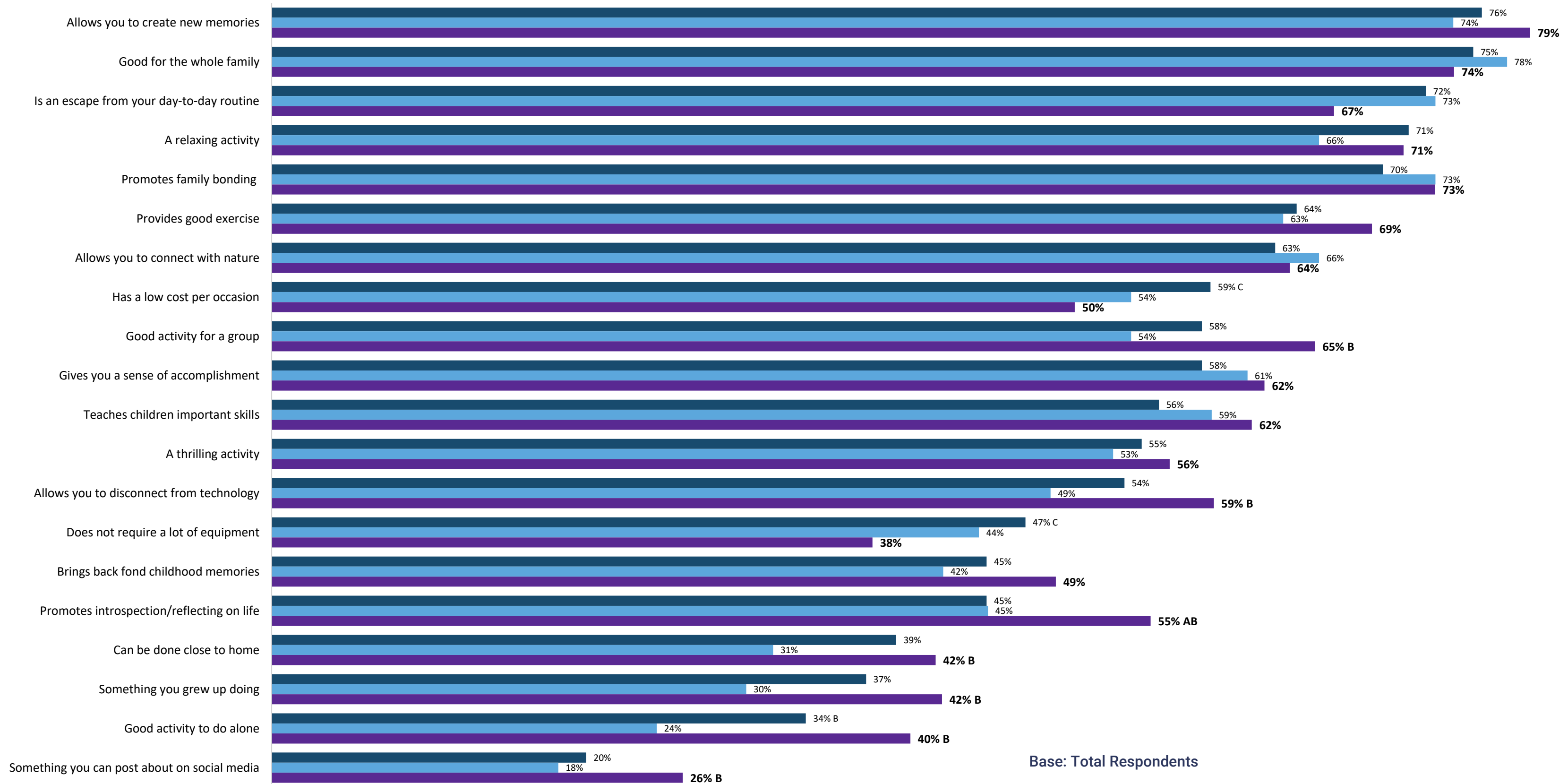
Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level



# outdoor activity importance by boating participation

A1.How important are each of the following when deciding between outdoor leisure activities for yourself and your family?



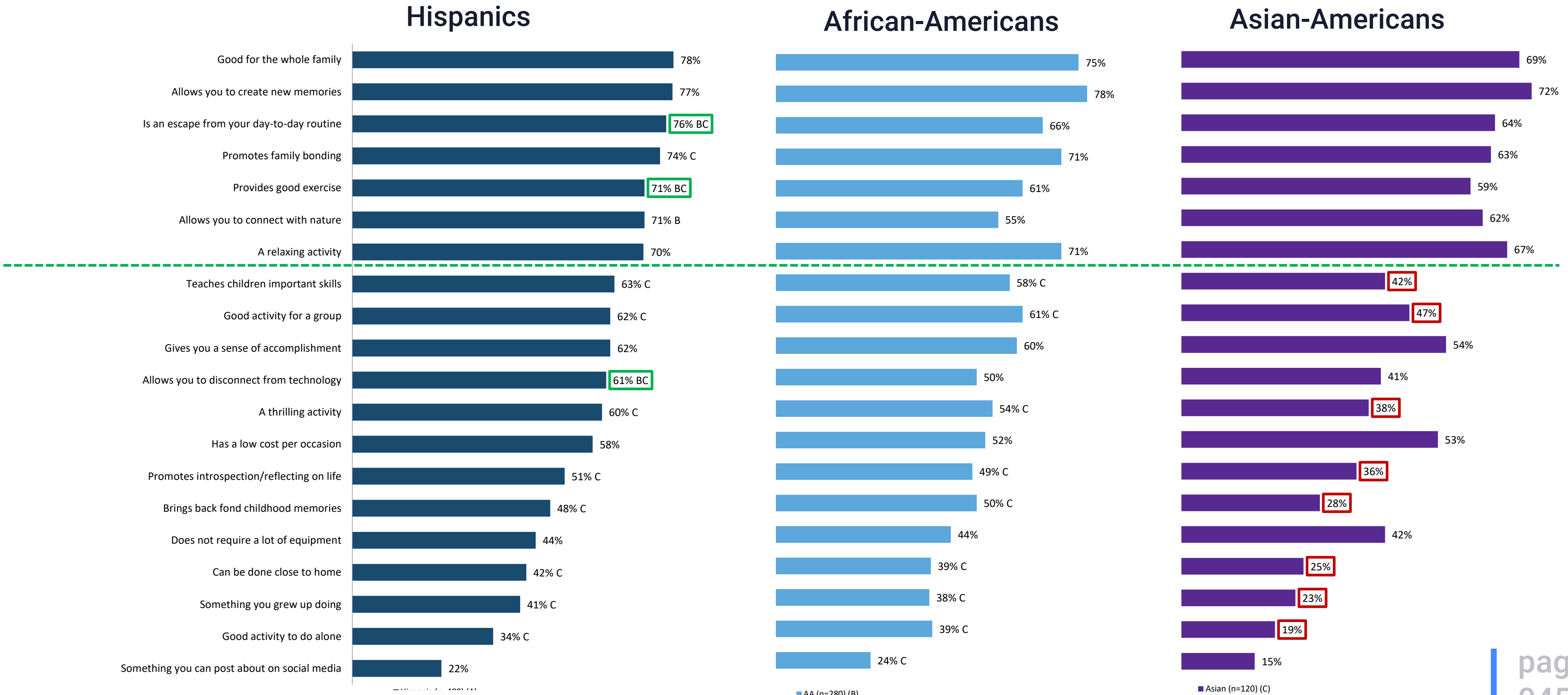
Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

■ Never boated (n=370) (A) ■ Boated 3+ years ago (n=178) (B) ■ Boated Past 2 Yrs (n=252) (C)

# Hispanics are the most likely to seek outdoor leisure activities that provide an escape from their day-to-day routine, good exercise, and allows them to disconnect from technology

## Drivers for Selecting Outdoor Activities



A1.How important are each of the following when deciding between outdoor leisure activities for yourself and your family?

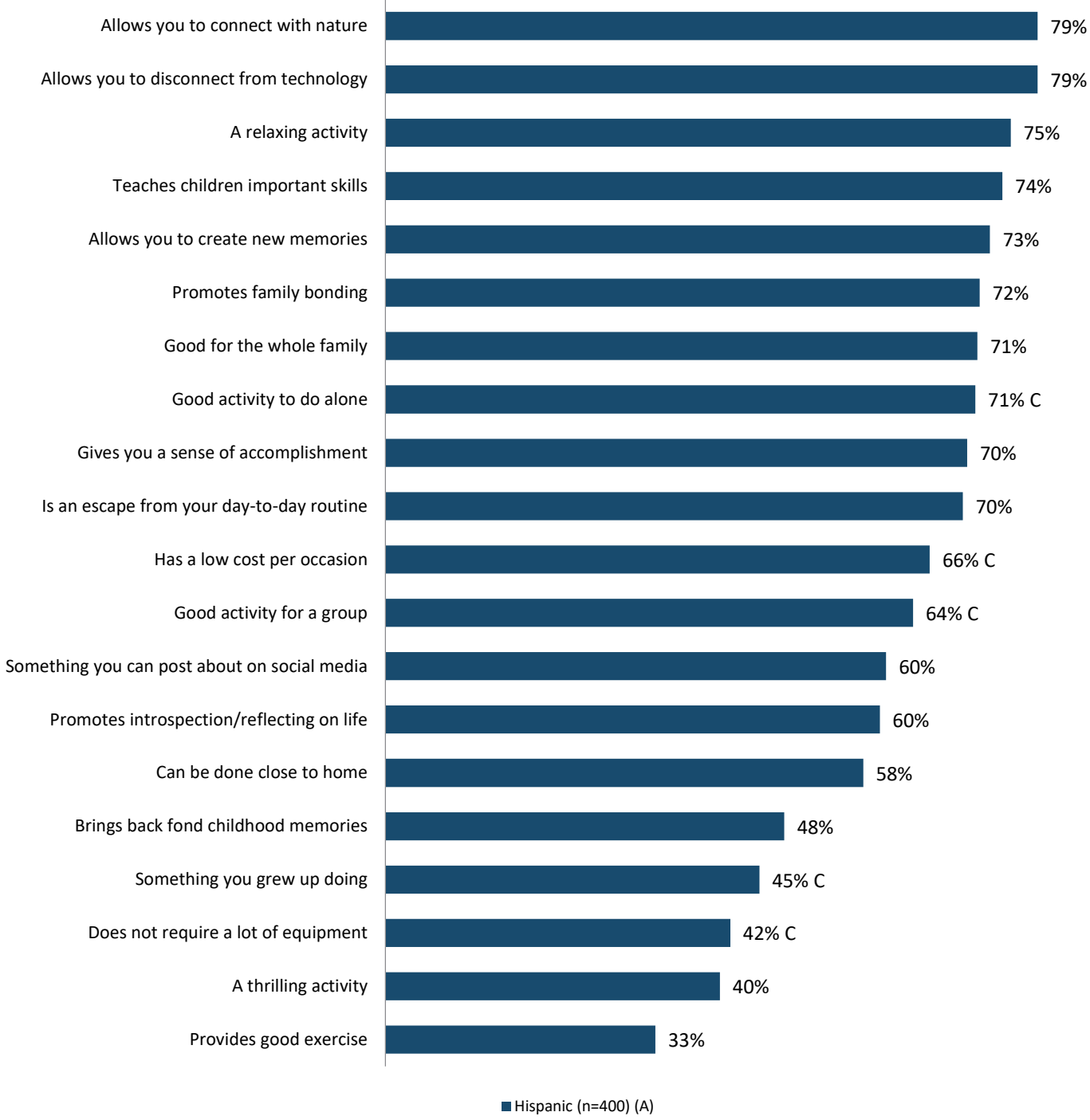
A/B/C = Statistically higher than the indicated group and the 95% confidence level

**African-Americans** have a more positive view of fishing than do Hispanics or Asian-Americans. Key differentiators include their views about fishing promoting family bonding and being a good group activity, being something they can do close to home, and the nostalgic ties to childhood memories.

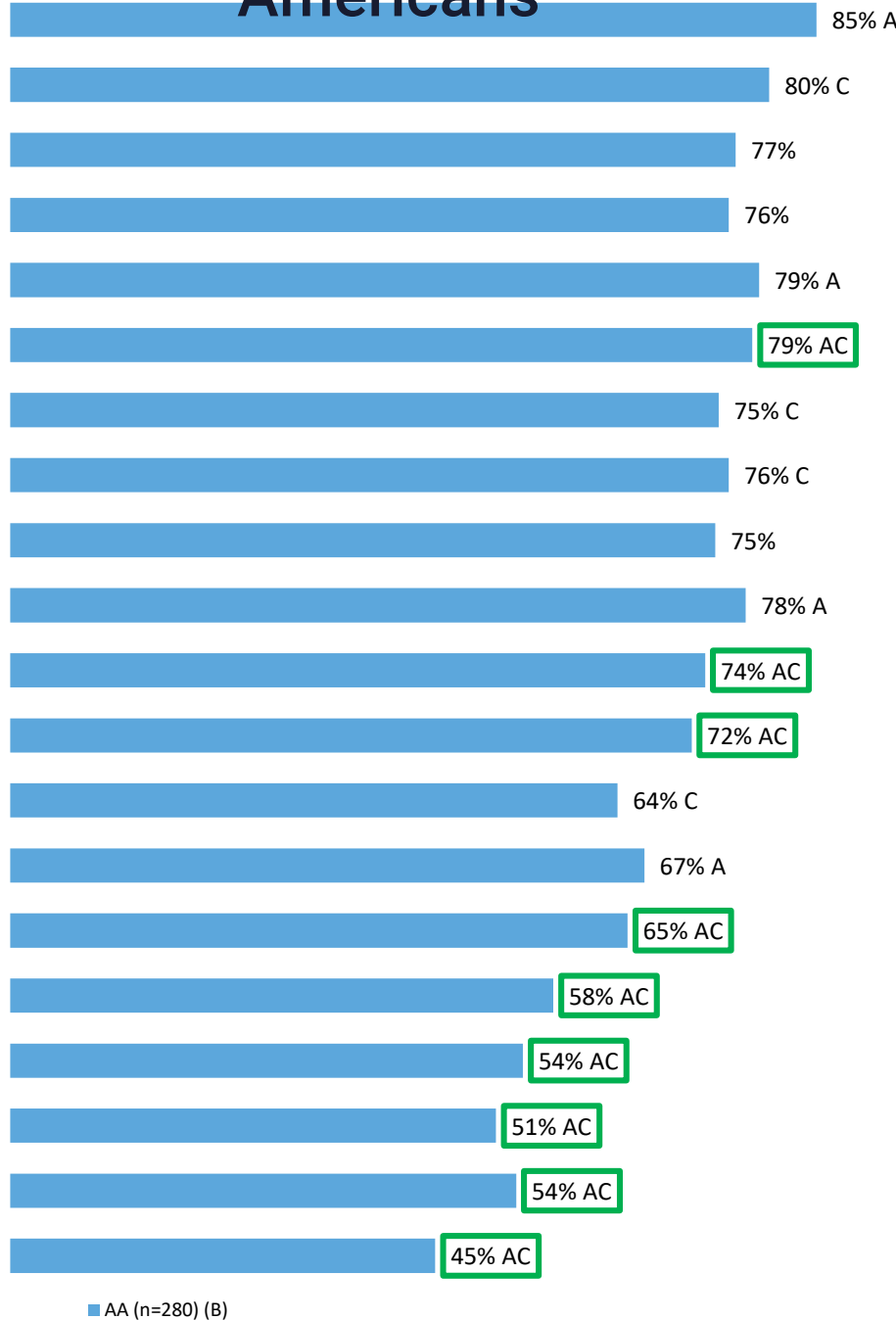
Phrases Describing Fishing



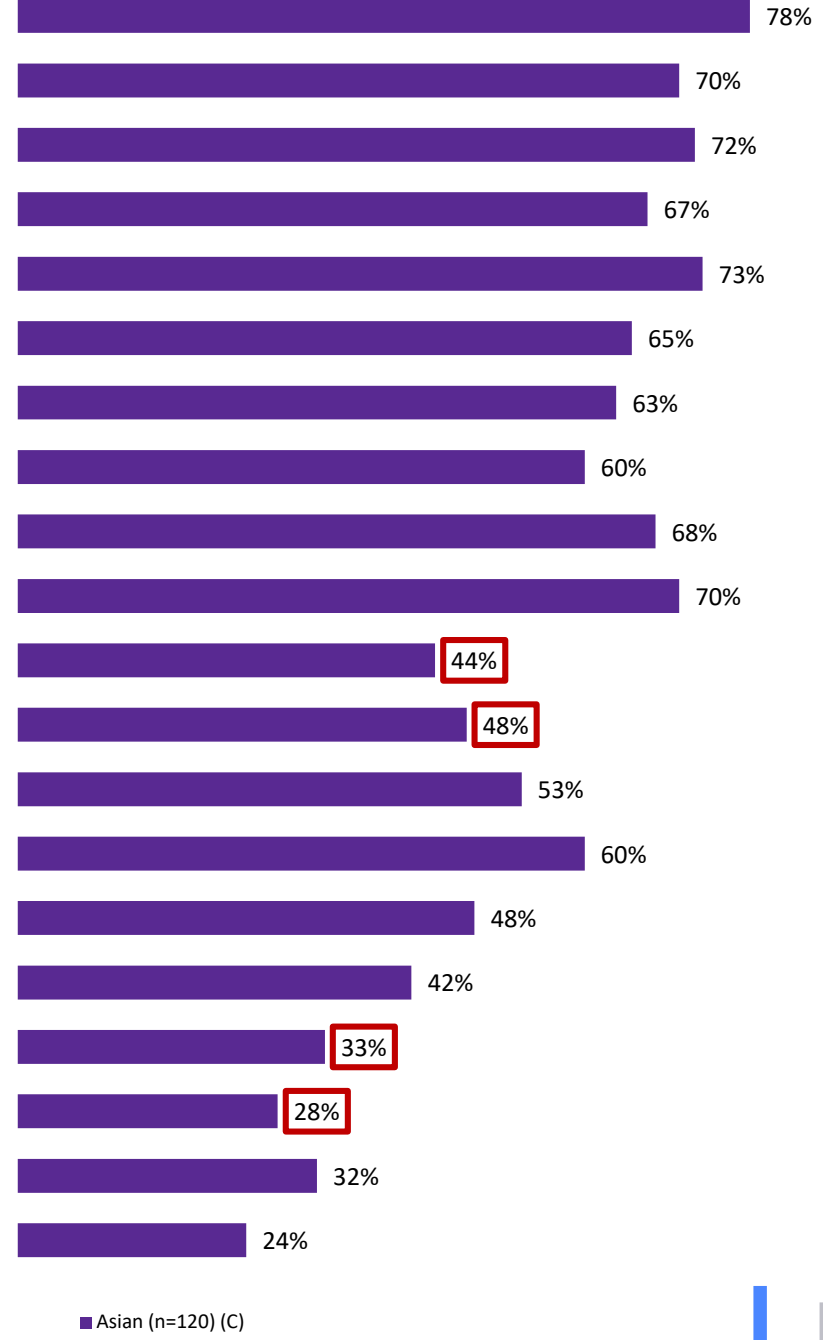
Hispanics



African-Americans



Asian-Americans

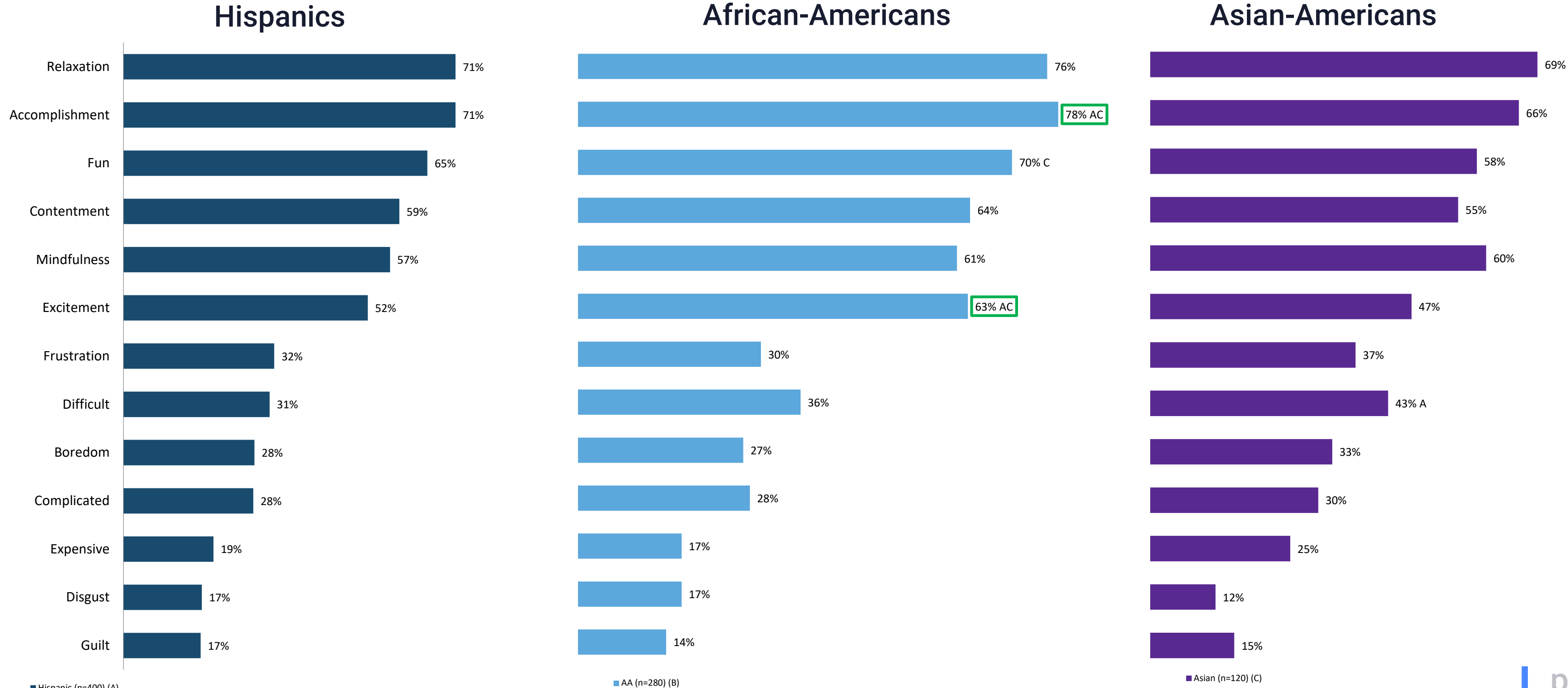


B1. Which of the following phrases describe fishing and boating?

A/B/C = Statistically higher than the indicated group and the 95% confidence level

# African-Americans are also more likely to associate fishing with accomplishment and excitement

## Emotions Describing Fishing



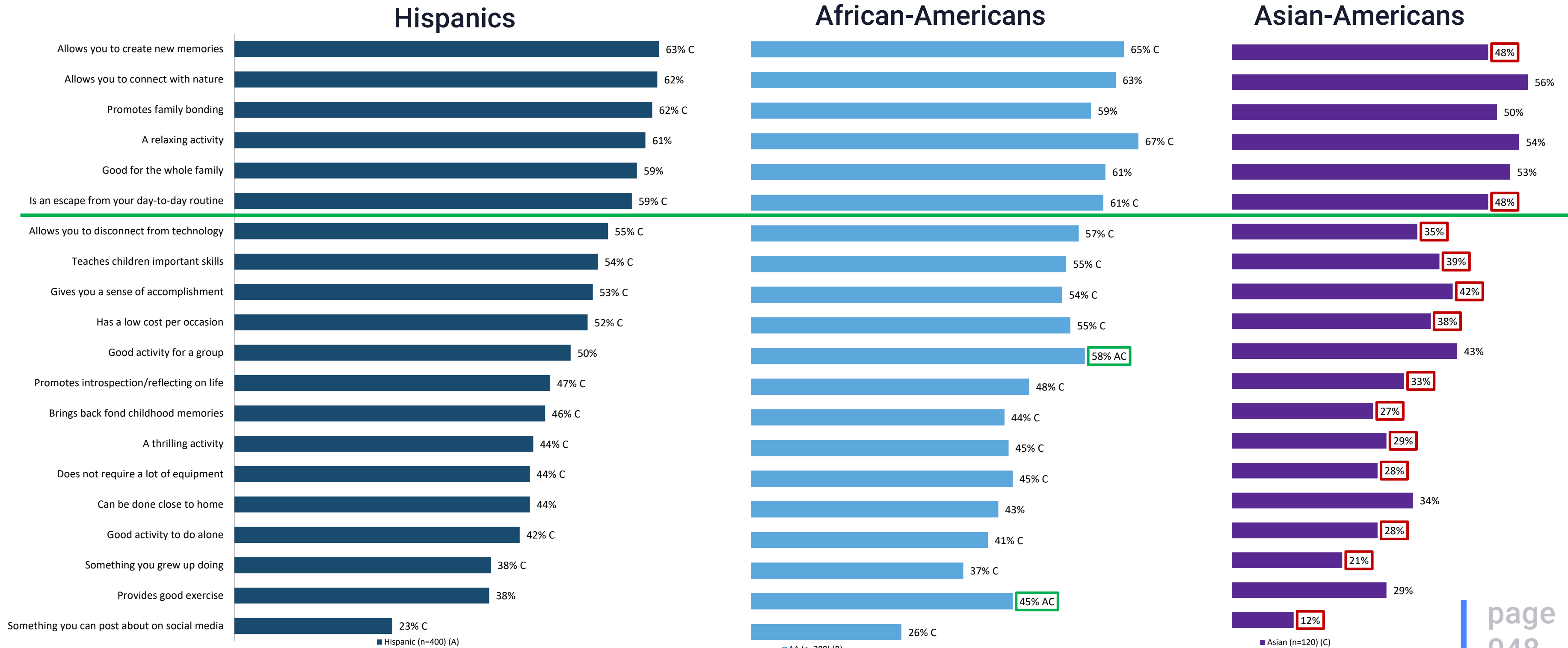
B2. Which of the following emotions describe fishing and boating?

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

Hispanics and African-Americans, and to a lesser degree, Asian-Americans, have the same primary reasons for fishing—it allows them to create new memories, connect with nature, promote family bonding, relax, and escape. African-Americans also view fishing as a good group activity.

### Reasons For Going Fishing

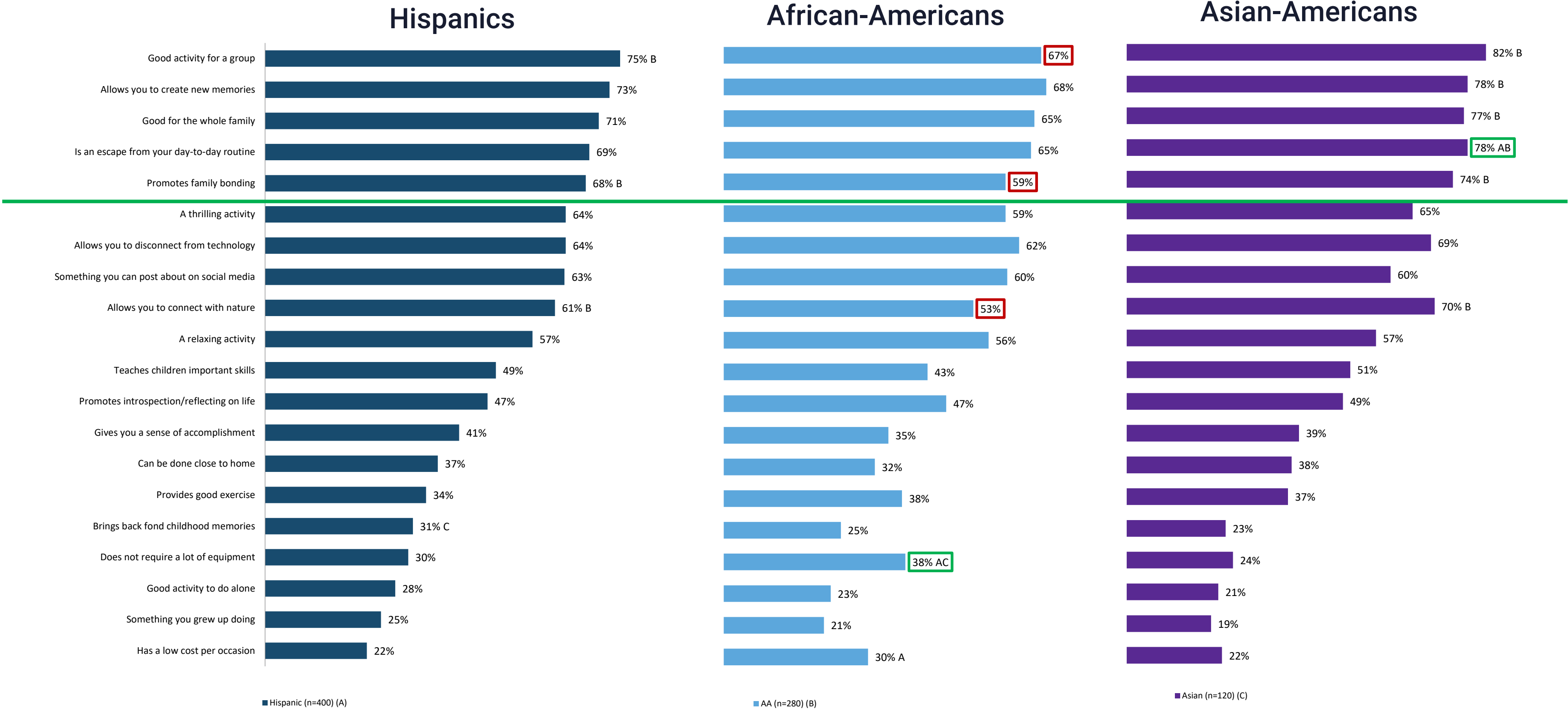


B3.How important are each of the following reasons for going fishing?

A/B/C = Statistically higher than the indicated group and the 95% confidence level

# Asian-Americans are more positive toward boating than fishing while African-Americans are less positive.

## Phrases Describing Boating



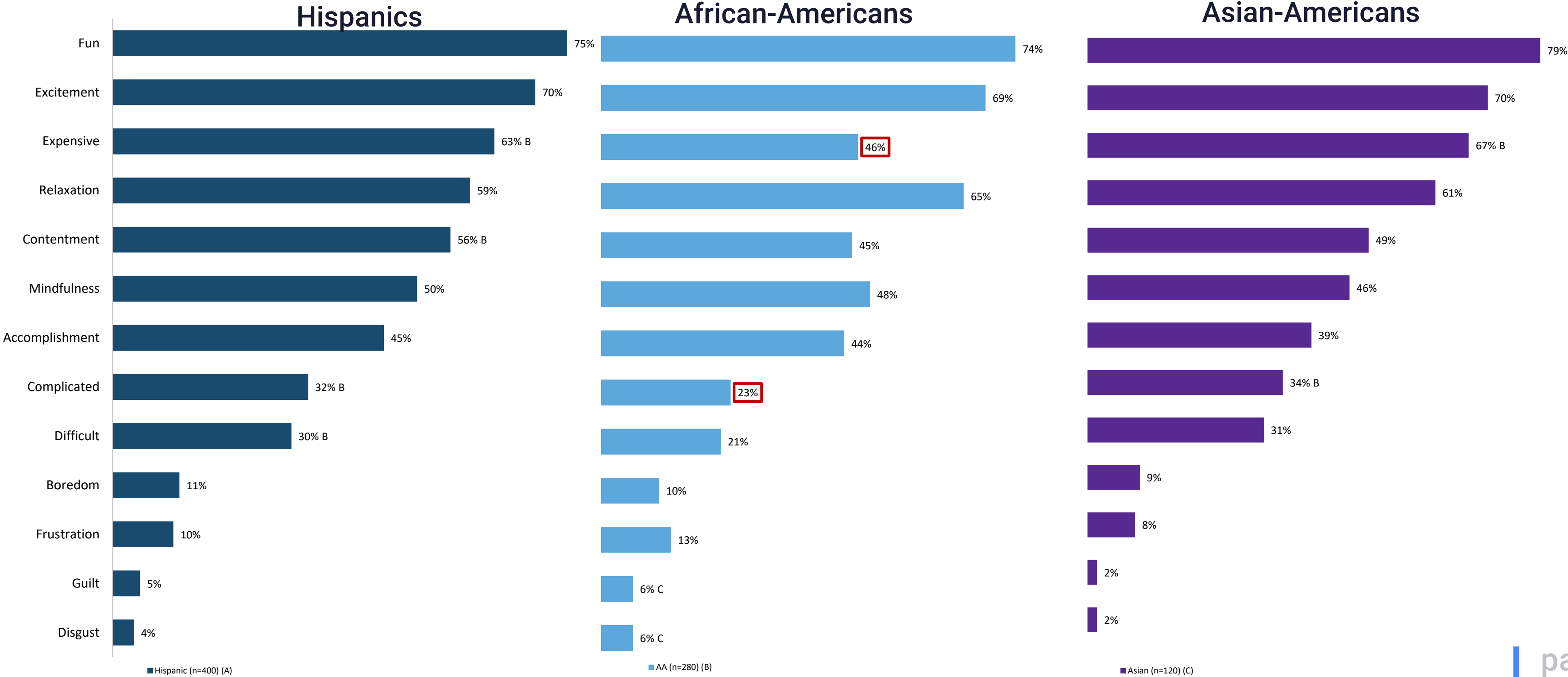
B1. Which of the following phrases describe fishing and boating?

A/B/C = Statistically higher than the indicated group and the 95% confidence level



Across ethnicities, boating is seen as fun and exciting. Even though African-Americans are less favorable toward boating, they are the least likely to consider the activity expensive or complicated.

Emotions Describing Boating



B2. Which of the following emotions describe fishing and boating?

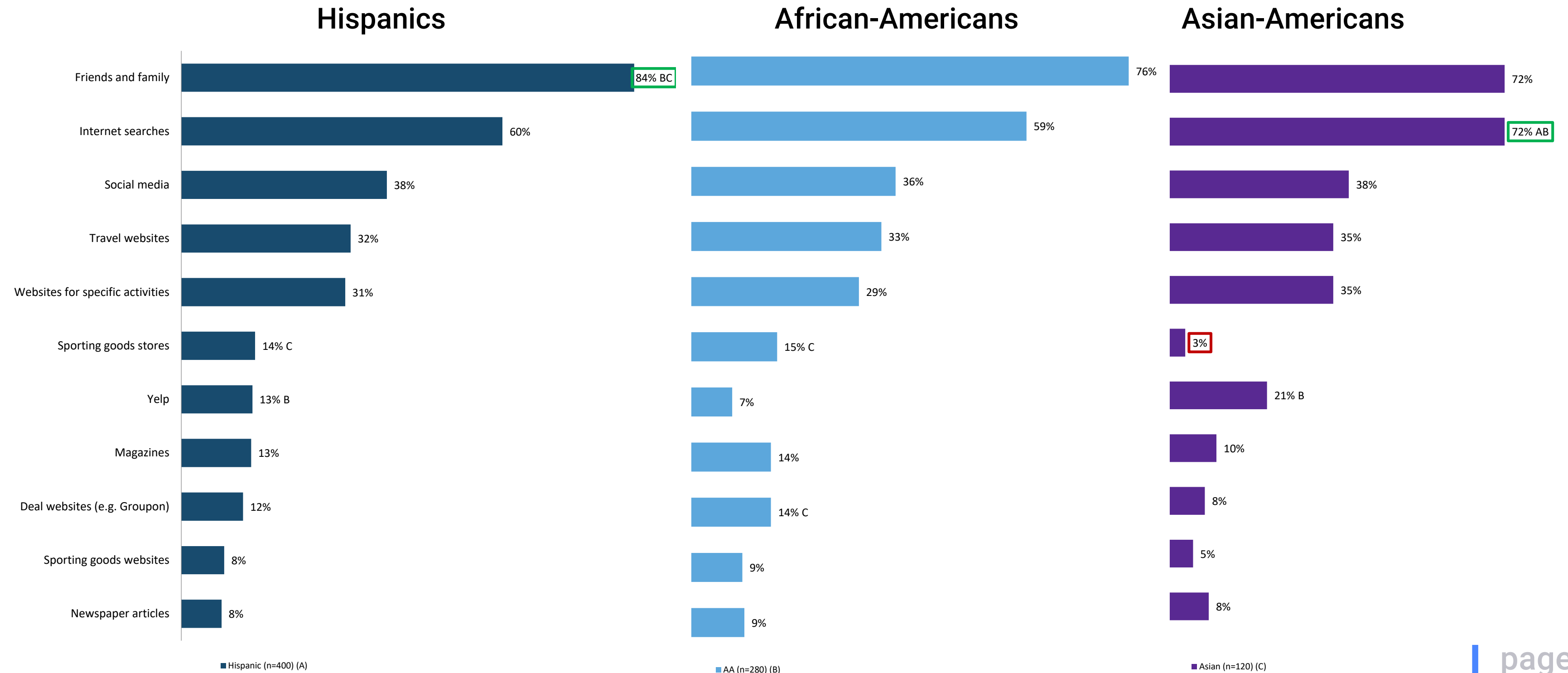
Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

# All ethnic groups rely on word of mouth as their primary source of ideas for outdoor activities, especially for Hispanics

- Asian-Americans are equally likely to search the internet as they are to use friends and family for planning.

## Sources Used to Plan Outdoor Activities



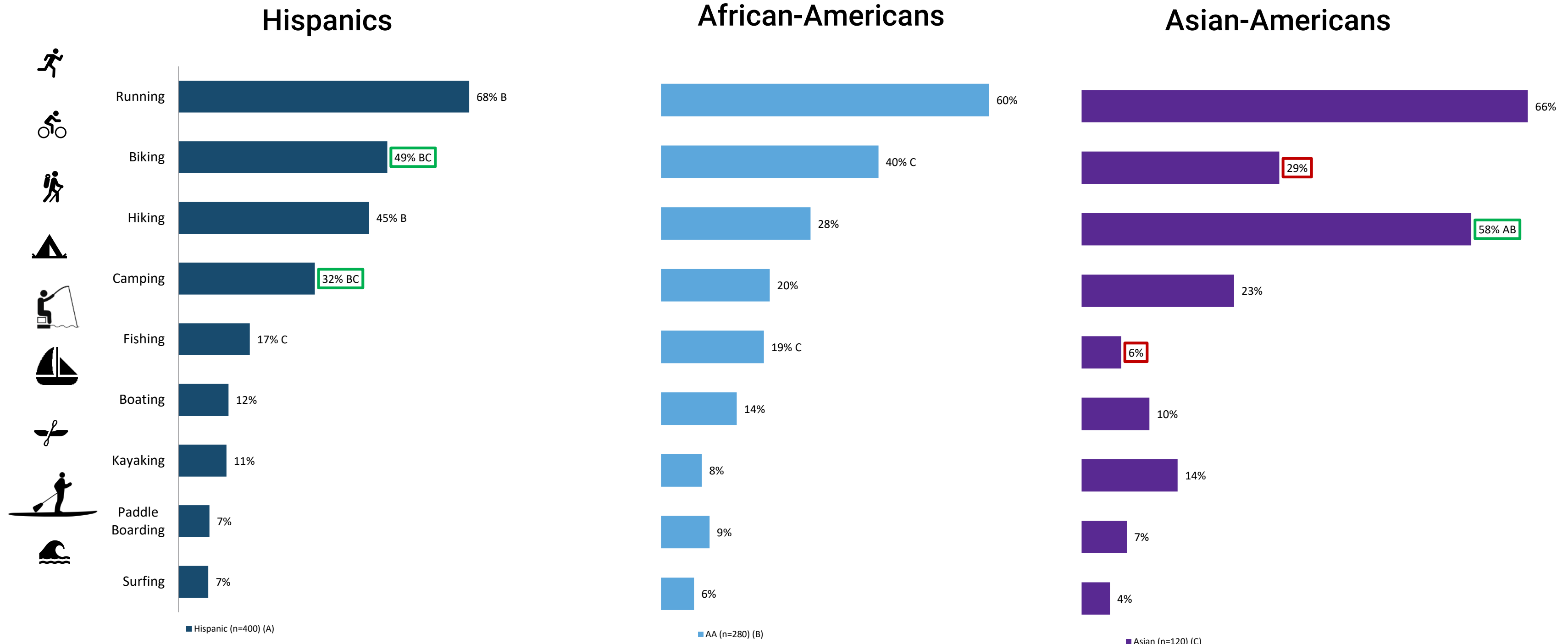
Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

# While running is the main outdoor activity across ethnicities, Hispanics and African-Americans are also active in biking while Asian-Americans are more into hiking

- Among these occasional/lapsed and potential anglers, Asian-Americans are the least likely to fish.
- Hispanic involvement in camping could be a great segue into fishing and boating.

## Activities Currently Participate In



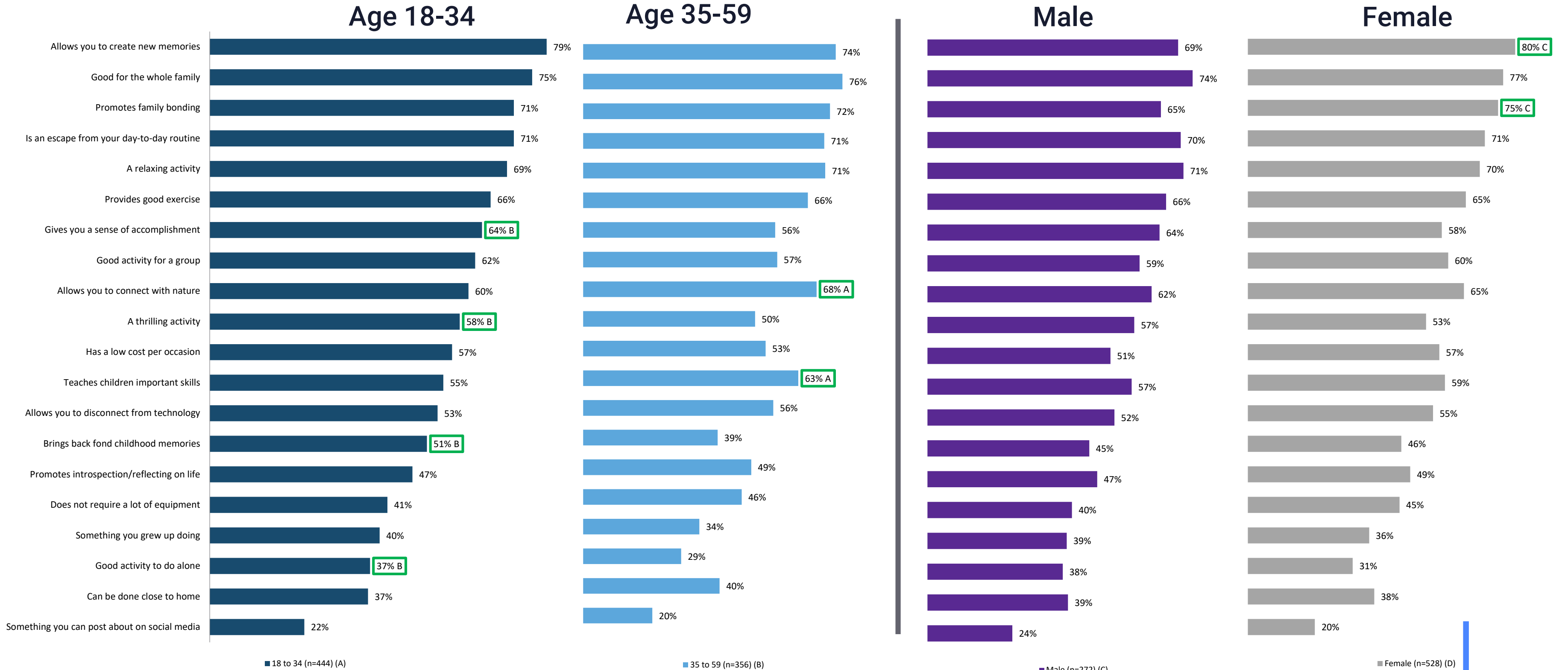
S10.What is your level of participation in the following activities?

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

**Younger multicultural anglers are more likely to want a thrill or sense of accomplishment from their outdoor activity while older anglers want to connect with nature more and to teach children important skills. Women are more interested in activities that create new memories and promote family bonding.**

## Drivers for Selecting Outdoor Activities

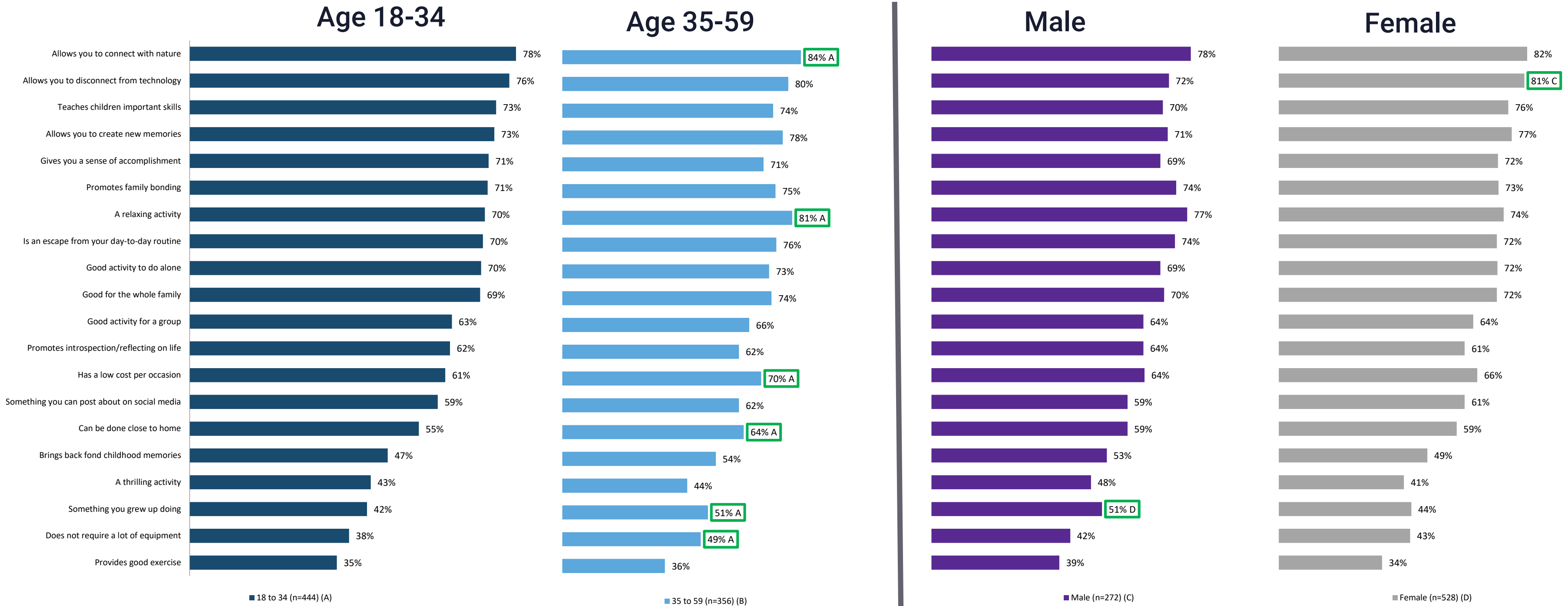


A1. How important are each of the following when deciding between outdoor leisure activities for yourself and your family?

A/B/C/D = Statistically higher than the indicated group and the 95% confidence level

# Older multicultural anglers are more positive toward fishing as it allows them to relax and connect with nature. Women feel it allows them to disconnect from technology more while men are more likely to have grown up fishing.

## Phrases Describing Fishing

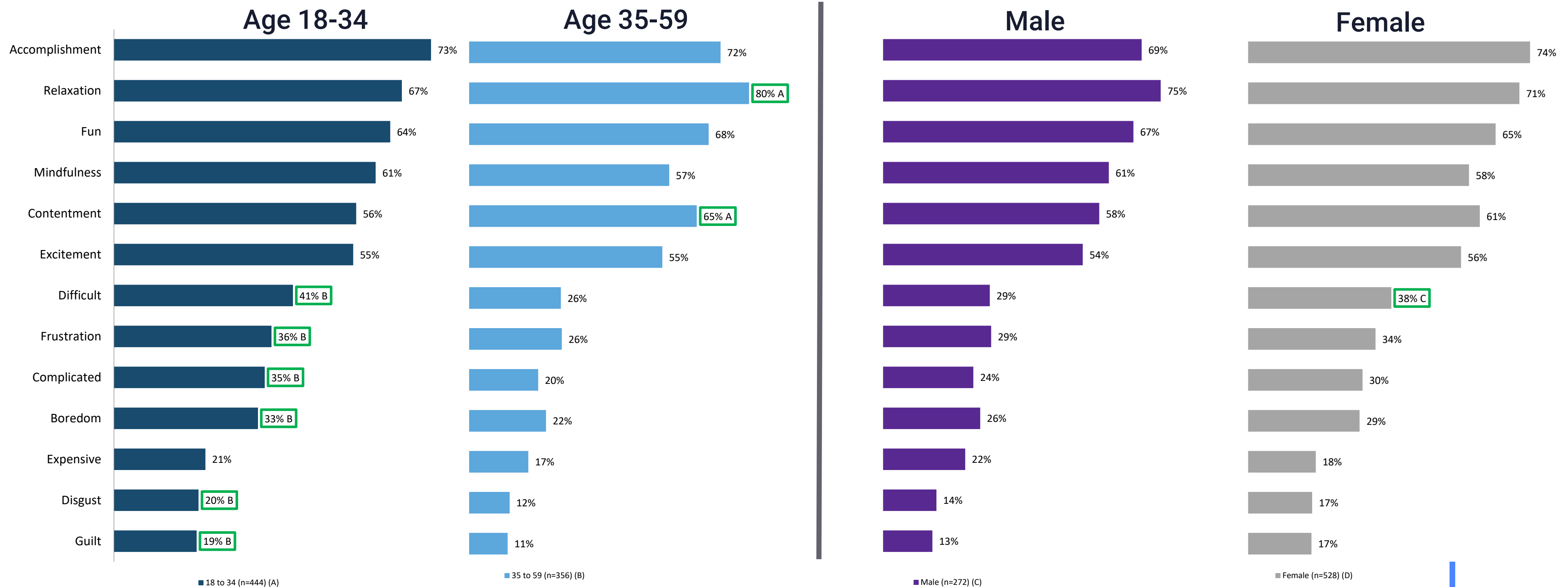


B1. Which of the following phrases describe fishing and boating?

A/B/C/D = Statistically higher than the indicated group and the 95% confidence level

Older multicultural anglers associate fishing more with relaxation and contentment while their younger counterparts are more negative to the sport—seeing it as more difficult, frustrating, complicated, and boring. There are no gender differences with the one exception that women find fishing more difficult than do men.

## Emotions Describing Fishing



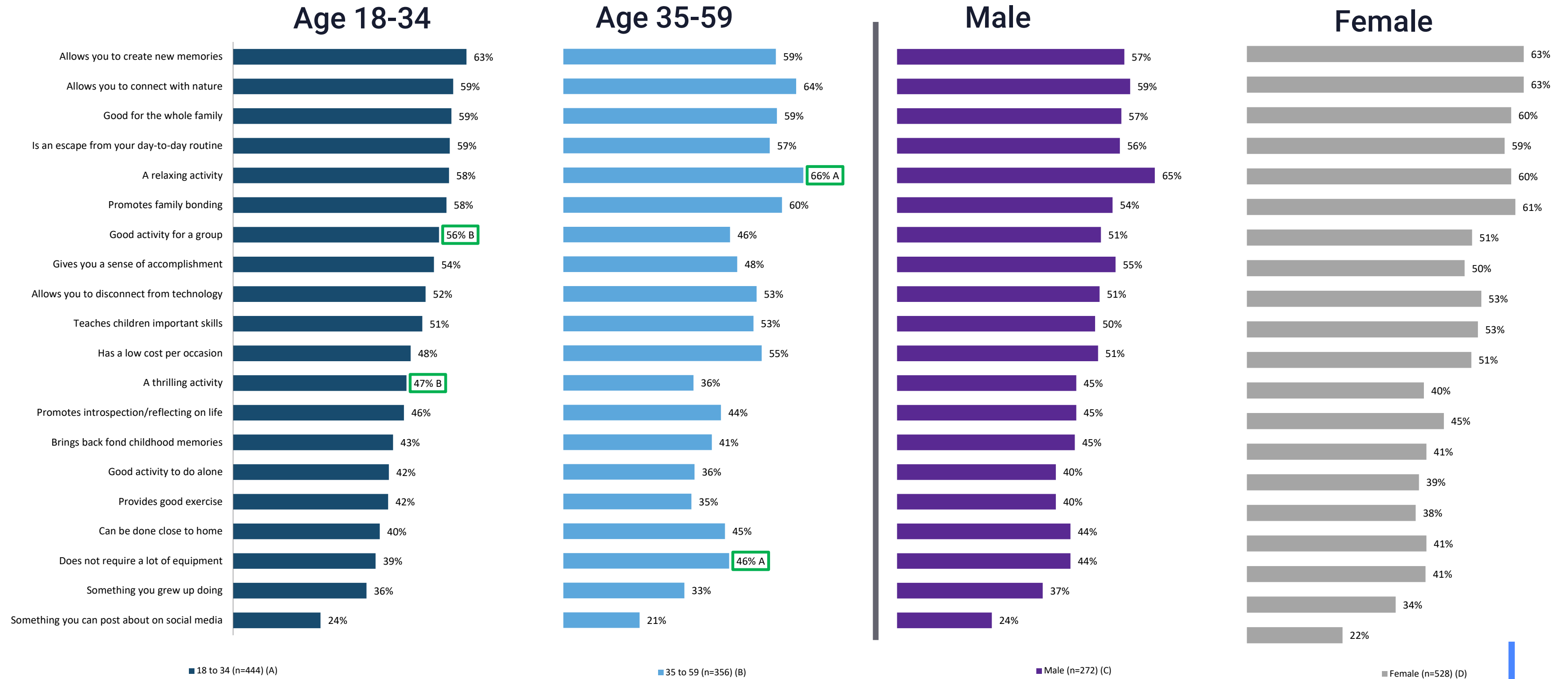
B2. Which of the following emotions describe fishing and boating?

A/B/C/D = Statistically higher than the indicated group and the 95% confidence level



Older multicultural anglers are more likely to go fishing for relaxation while younger anglers are more likely to fish because it is a good group activity that they find thrilling. There are no gender differences in reasons for going fishing.

## Reasons for Going Fishing

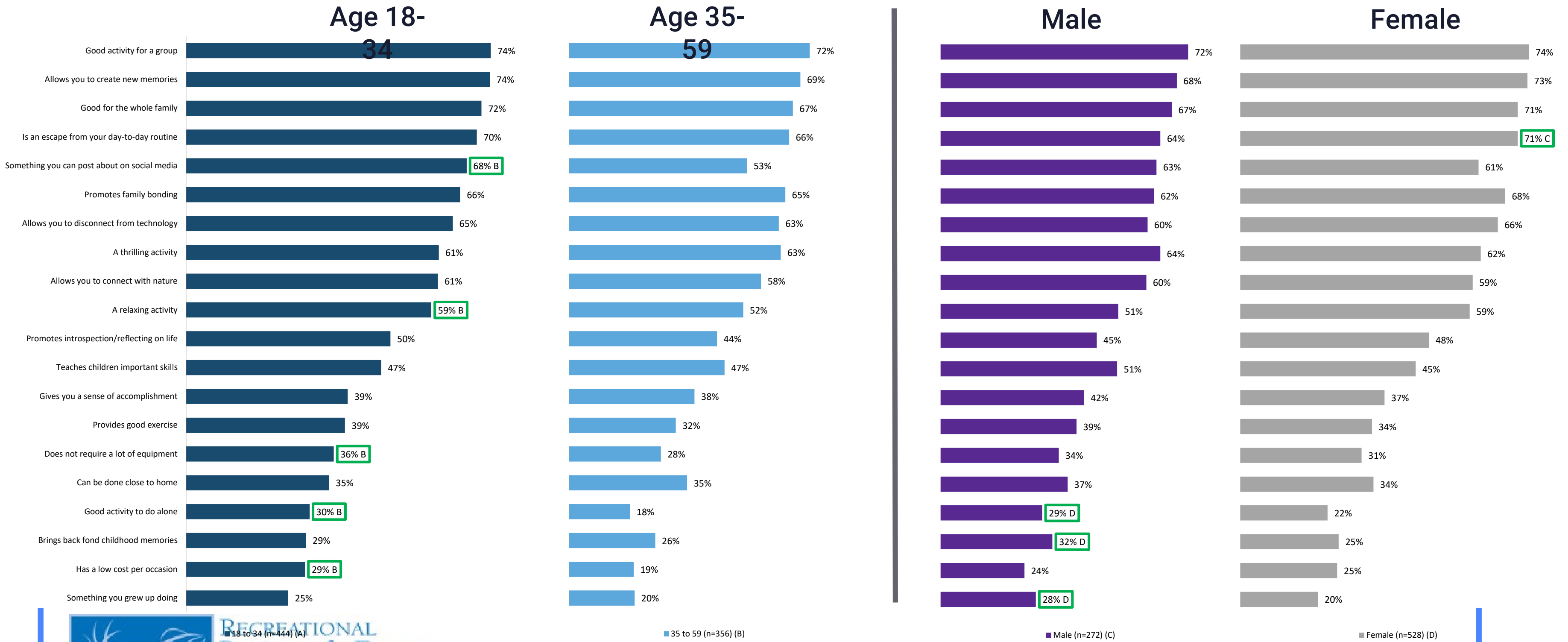


B3.How important are each of the following reasons for going fishing?

A/B/C/D = Statistically higher than the indicated group and the 95% confidence level

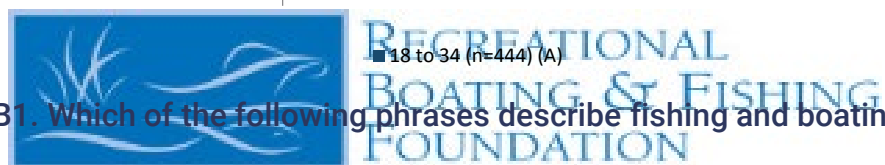
Younger multicultural anglers are more likely to consider boating relaxing and something they can share on social media. Females are more likely than males to feel boating is an escape from their daily routine; males are more nostalgic about the activity.

## Phrases Describing Boating



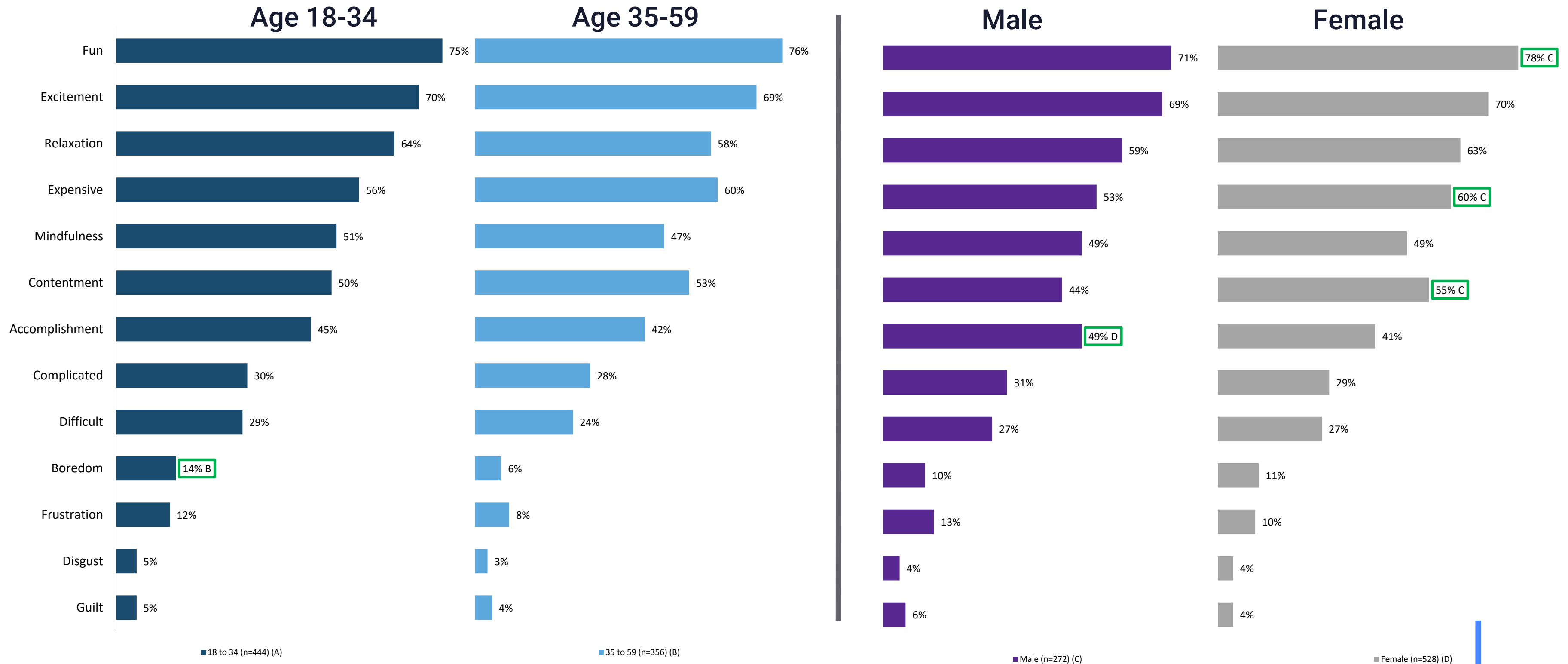
B1. Which of the following phrases describe fishing and boating?

A/B/C = Statistically higher than the indicated group and the 95% confidence level



Overall, younger anglers feel the same way about boating as do older anglers with one exception—they are more likely to find it boring. Women are more likely to see boating as fun, but expensive, and providing contentment. Men are more likely to get a sense of accomplishment from boating.

## Emotions Describing Boating

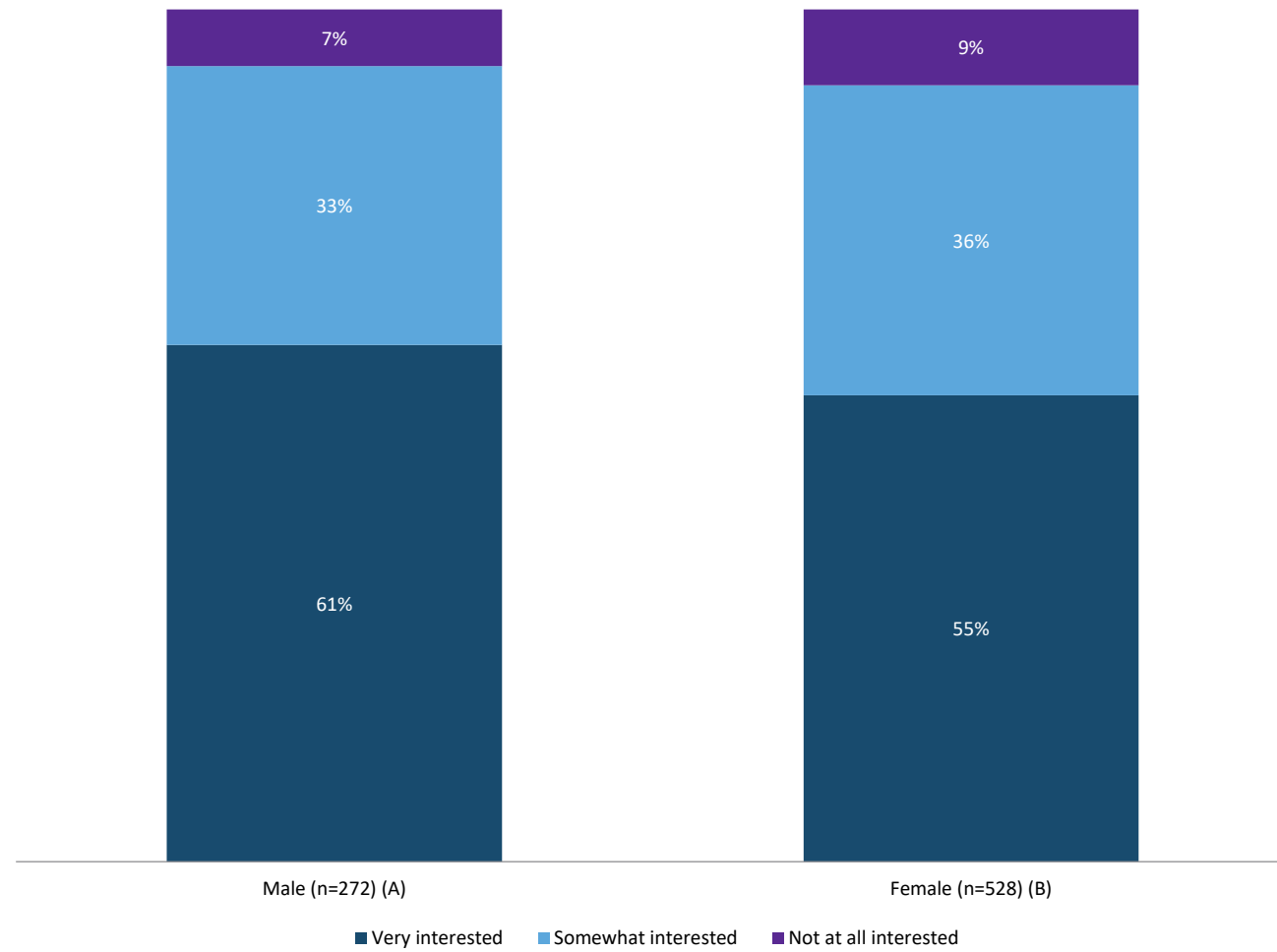


B2. Which of the following emotions describe fishing and boating?

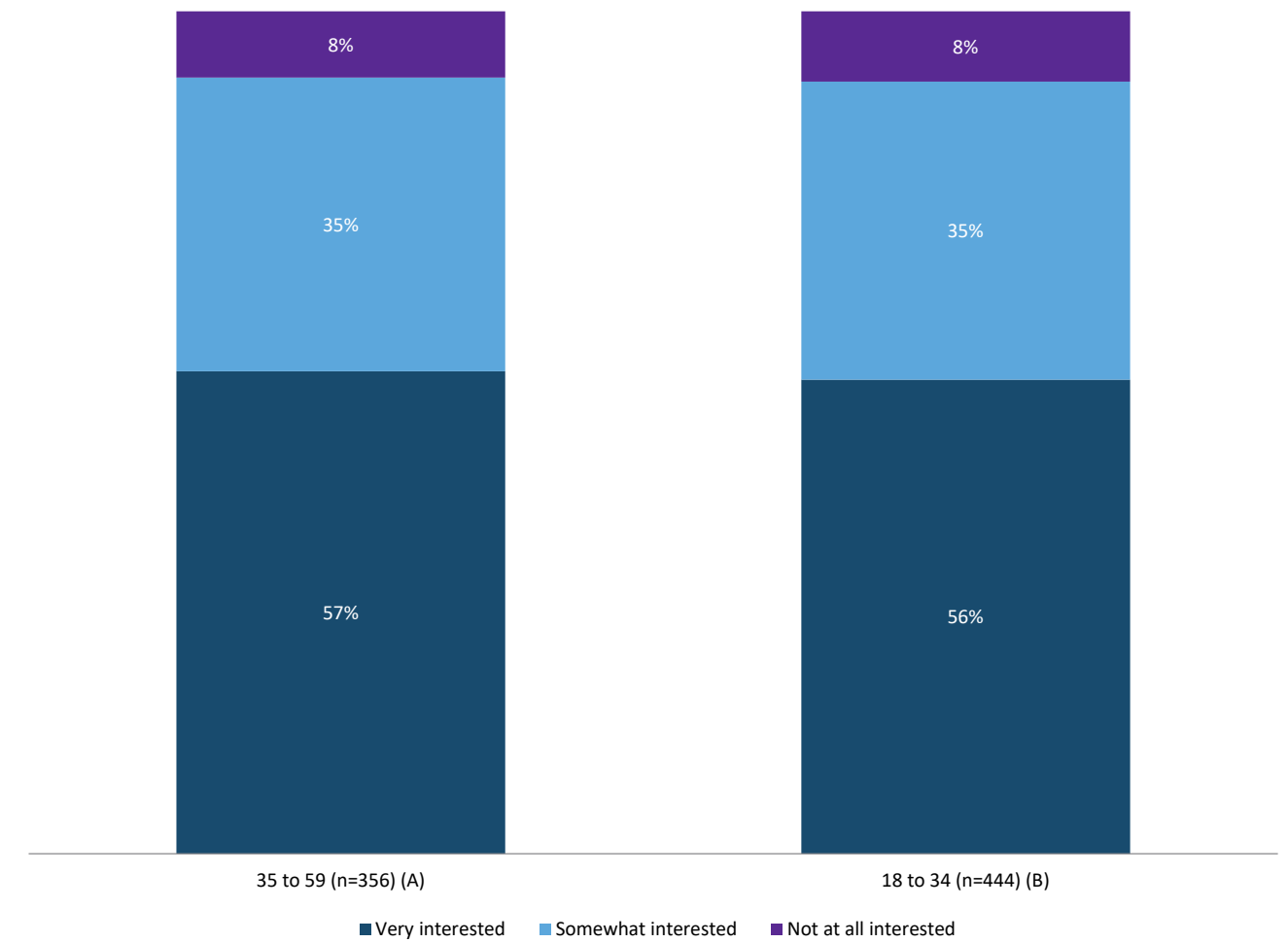
A/B/C = Statistically higher than the indicated group and the 95% confidence level

# interest in fishing

Interest in Going Fishing - By Gender



Interest in Going Fishing - By Age



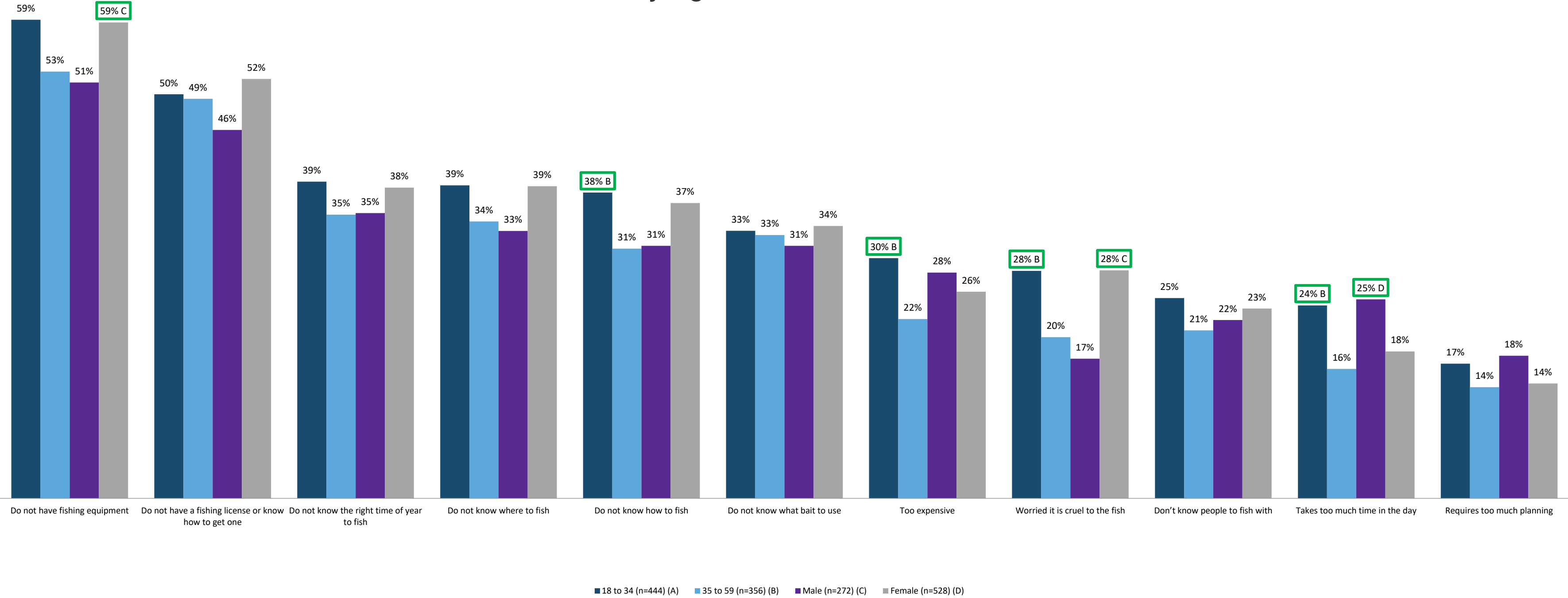
S11.If you had the opportunity, how interested would you be in going fishing in the next 2 years?

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

Women are more likely than men to not fish because they don't have the gear. Men are more likely than woman are to claim fishing is too time consuming. Younger anglers are more likely to claim they don't know how to fish, it's too expensive, and too time consuming. Younger and female anglers are more likely than their older and male counterparts to say they worry about the cruelty to the fish.

### Barriers to Fishing By Age and Gender



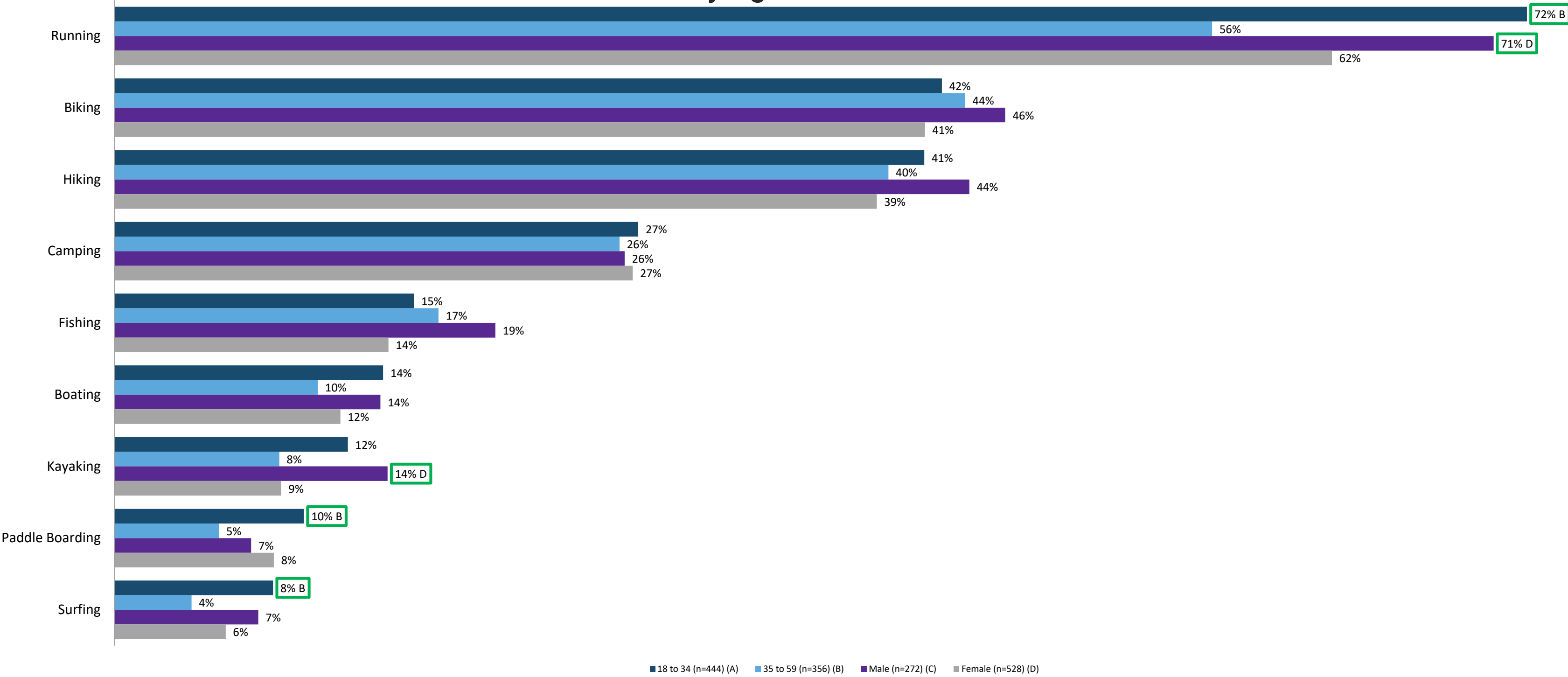
B4.How important are each of the following reasons for NOT fishing?

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

Younger and male multiculturalals are more likely to be runners than their counterparts. Men are also more into kayaking than are women and younger anglers are more into paddle boarding and surfing than are older anglers.

### Activities Currently Participate In By Age and Gender



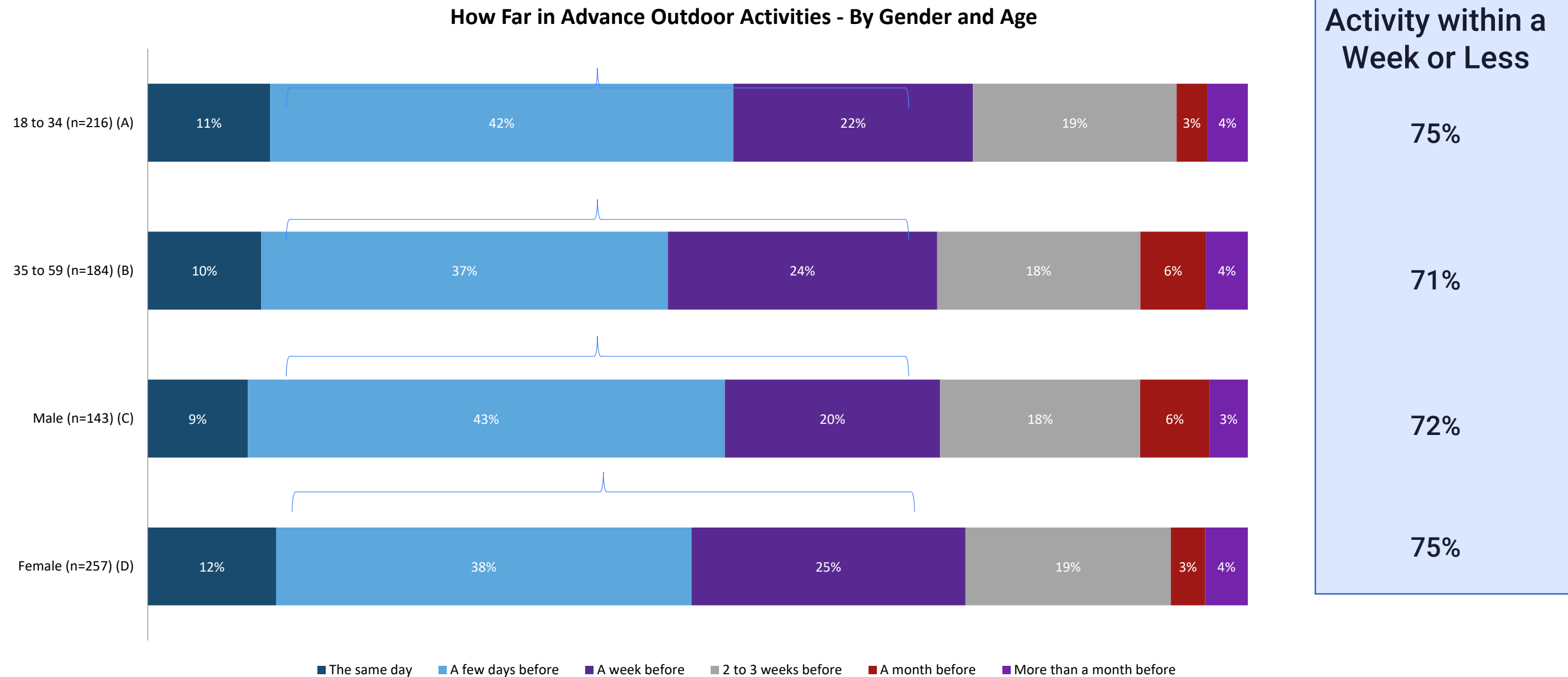
S10.What is your level of participation in the following activities?

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level



# There were no age or gender differences in how far in advance outdoor activities are planned.



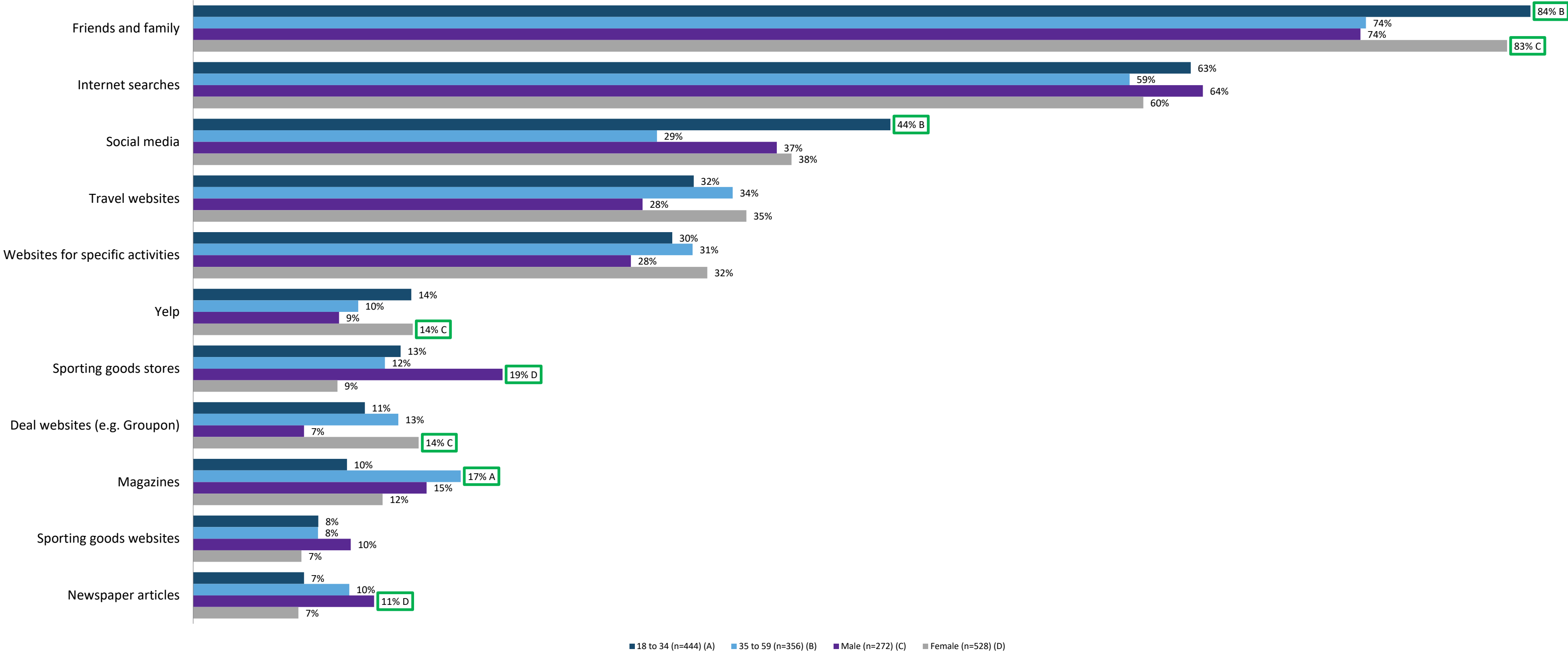
A2. Which of the following best describes how far in advance you typically plan your outdoor activities?

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

# Younger and female anglers are more likely than are their counterparts to rely on friends and family for planning outdoor activities. Younger anglers also look to social media more than do older anglers. Men are the most likely to visit sporting goods stores when deciding.

Sources Used to Plan Outdoor Activities



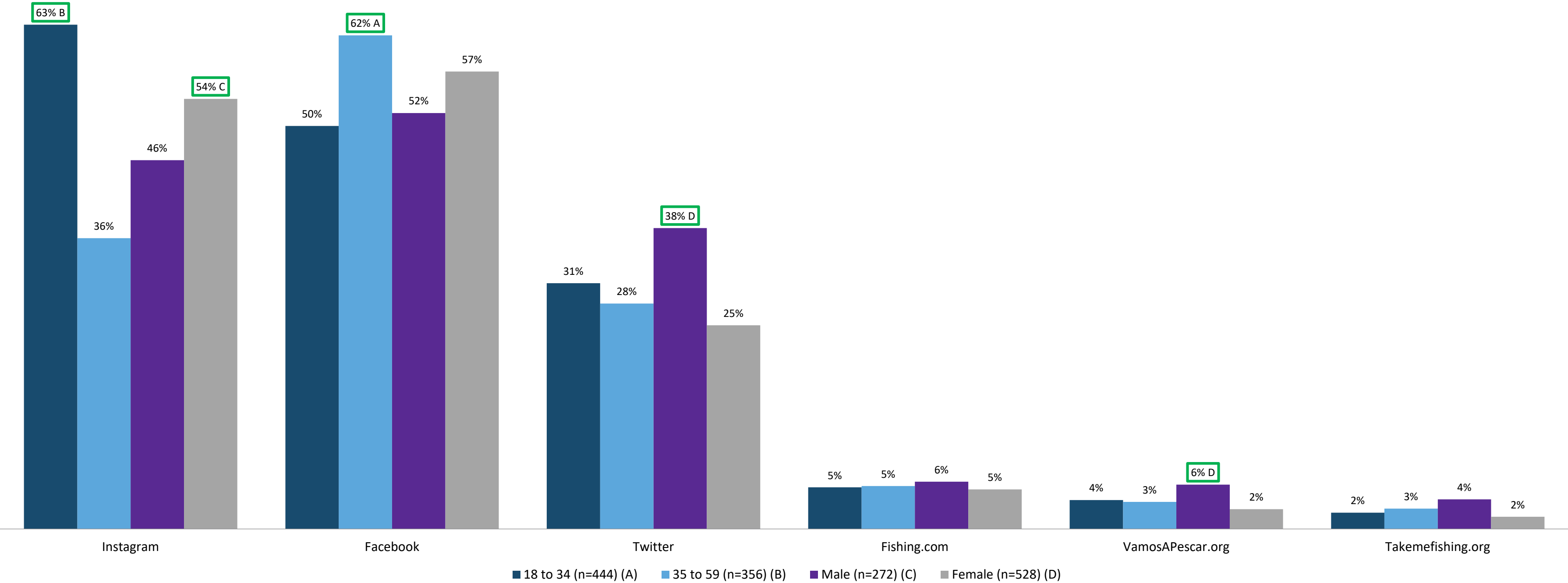
A3. Which of the following, if any, do you use to help plan and decide outdoor activities?

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

Younger and female anglers are more likely to use Instagram; older anglers are more often on Facebook. Male anglers are heavier users of Twitter.

### Sites/Apps Visited Regularly By Age and Gender



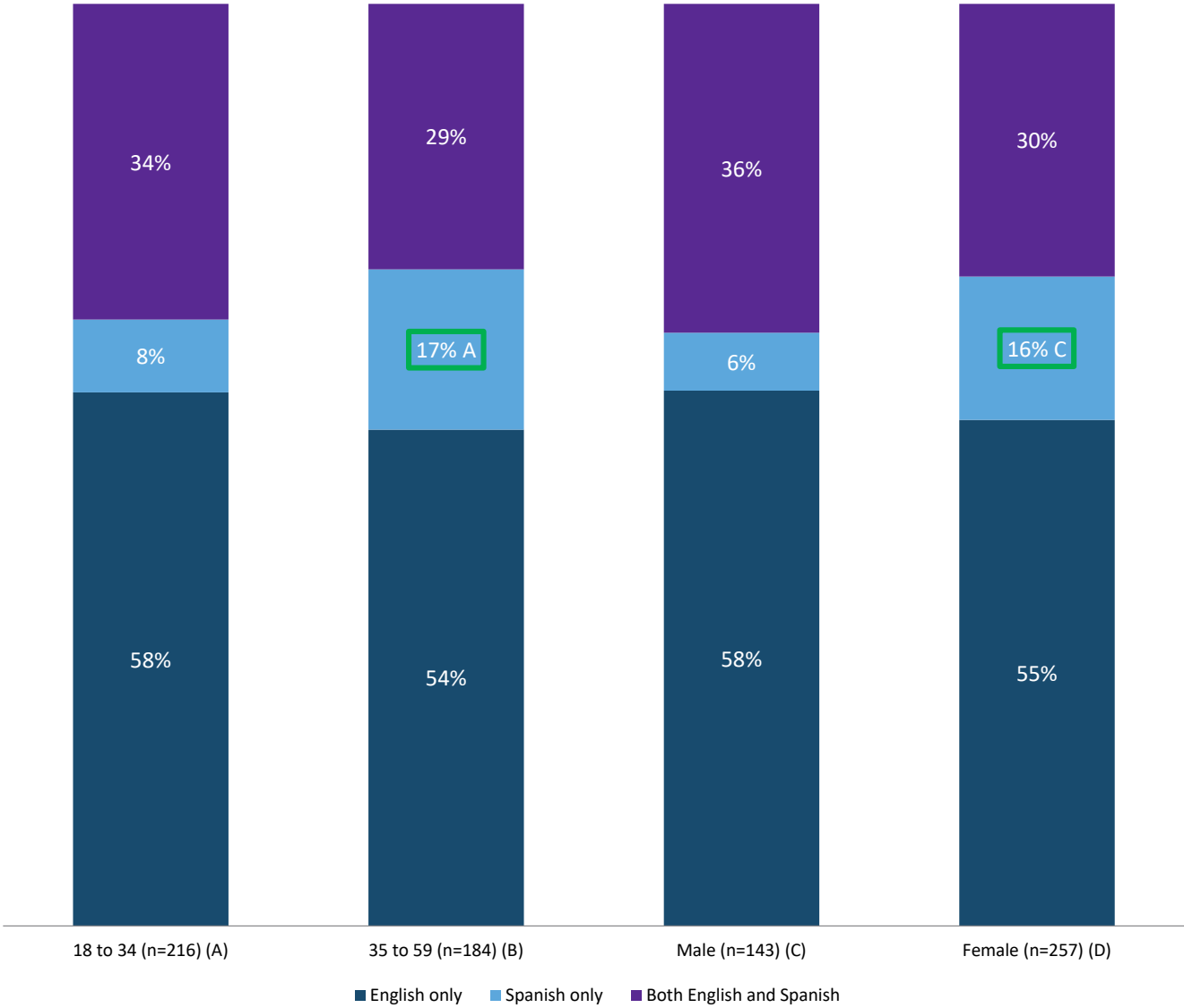
c3. For the sites/apps listed below, please indicate how often you visit each one.

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

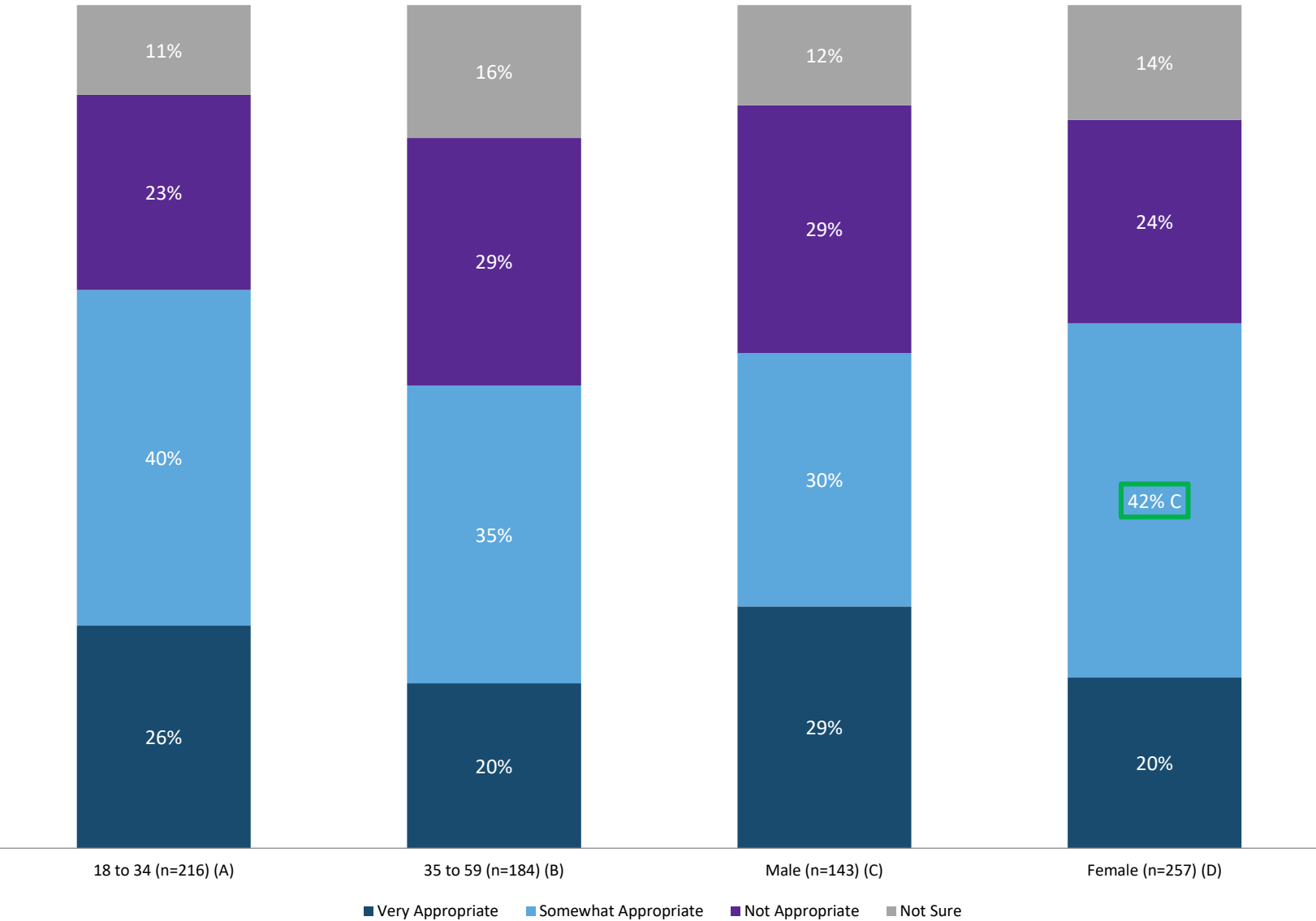
# Older and female Hispanics are more likely to prefer Spanish only than do younger or male Hispanics, although at relatively low levels. The appropriateness of the use of Spanglish in advertising doesn't differ by age or gender.

Hispanic language preferences



C4. In what language would you prefer to get information about boating and fishing?

Appropriateness of Spanglish in Advertising

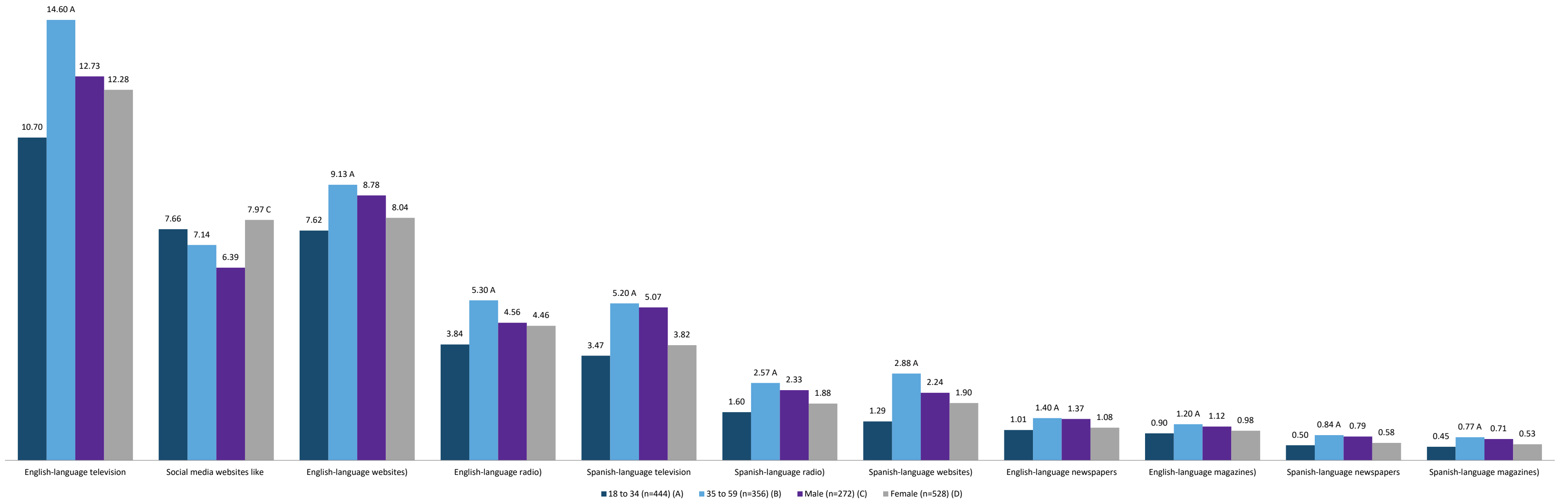


C5. How appropriate do you feel it is to use Spanglish in advertising?

Base: Hispanic Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

# averaged media hours per week



C1. In an average week, how many hours would you say you watch, listen to or read the following types of media?

Base: Total Respondents

A/B/C = Statistically higher than the indicated group and the 95% confidence level

**THANK YOU**