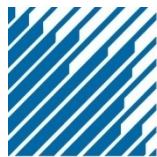




RECREATIONAL
BOATING & FISHING
FOUNDATION

Hispanic Segment Analysis

June 2011



Strategic
Marketing &
Research, Inc.

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Background & Methodology

The Recreational Boating & Fishing Foundation (RBFF) is committed to increasing participation in recreational fishing and boating as part of an effort to ensure public awareness and appreciation of the nation's aquatic resources and the need to protect, conserve and restore these resources. To achieve this, it is important to focus the organization's efforts on the best target segments. These targets are groups that can be influenced to increase their level of participation in fishing and boating. To better identify the best target segments, RBFF has been working with Strategic Marketing & Research, Inc., (SMARI) to identify the segments with the greatest potential.

Initial research identified a segmentation system based on attitudes and behavior, but also indicated that there was more research necessary relating to specific demographic niche groups. As part of this additional research, SMARI conducted a more in-depth analysis of the Hispanic market segment. The research was designed to survey the Hispanic audience, including a sufficient number of current anglers and boaters, to understand their behavior, and to assess their potential as a target audience for RBFF.

An online survey was conducted among 1,300 Hispanics across the country. SMARI worked with a national vendor that offers access to an online opt-in panel. Survey participants were given the option of completing the survey in either English or Spanish to ensure a representation of both acculturated and unacculturated consumers. A copy of the survey instrument is included in the appendix.

The informational objectives of this research are:

- Exploring current angling and boating behavior among the Hispanic consumer;
- Assessing motivations for choosing or not choosing to participate in boating and fishing;
- Identifying any cultural or heritage links to fishing and boating behavior;
- Determining the impact of acculturation on fishing and boating behavior; and
- Forwarding conclusions and recommendations regarding the potential of this segment, as well as the best options for encouraging increased participation.

The following is a summary of the key findings from this research, as well as recommendations regarding this consumer segment.

Hispanic Consumers

Before turning to a specific exploration of angling and boating behavior and preferences among the Hispanic audience, it is helpful to have some background on this group. The research uncovered a number of factors relating to this audience that will impact decisions about targeting, and many of these factors apply generally to the Hispanic consumer, rather than just to Hispanic anglers and boaters.

From 2000 to 2010, the Hispanic population grew 46% and is currently measured at 50 million (2010 Census). Additionally, this type of fast growth is predicted to continue, at least over the next few years.

The demographic profile of Hispanics highlights that they are younger, less educated, and have a lower household income than the population overall. They are also much more likely to have children in the household.

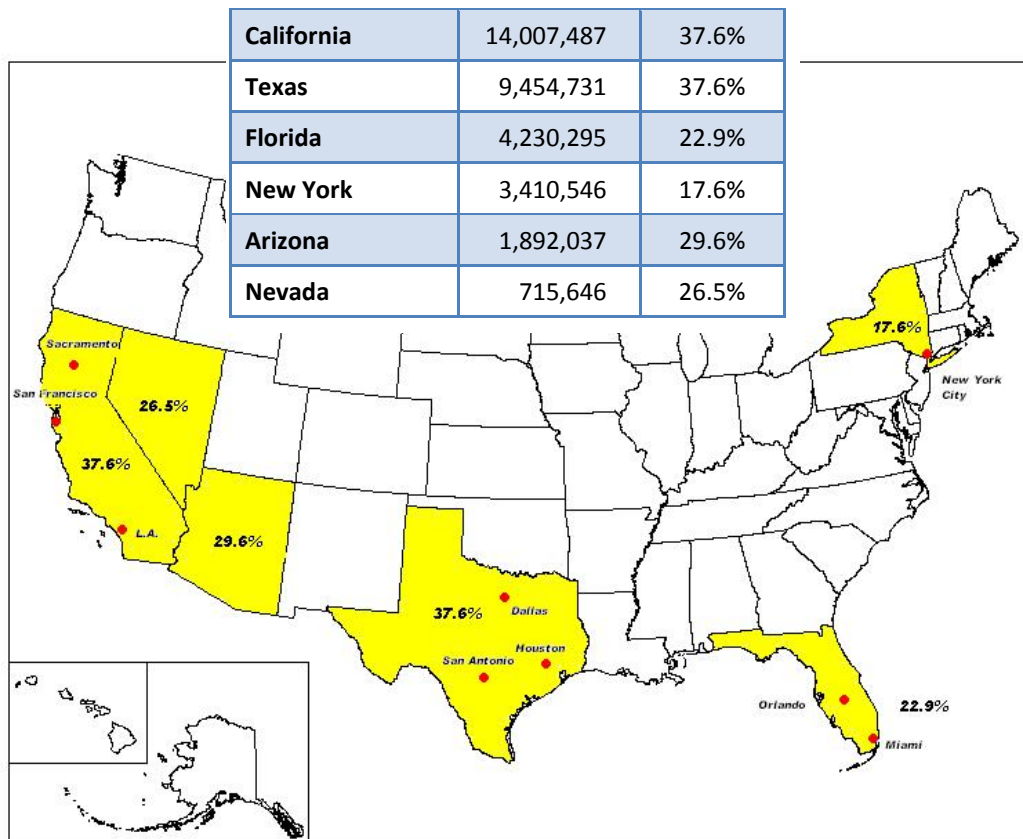
Demographics	Hispanic	U.S.
Employed full-time/self-employed	35%	43%
Employed part-time	10%	18%
Unemployed/Student/Disabled	40%	39%
Homemaker	15%	2%
High school graduate/GED or less	33%	49%
Some college/Community college	36%	27%
College degree or graduate degree	31%	25%
Single	39%	31%
Married	50%	51%
Separated/Divorced/Widowed	11%	18%
% with children in household	53%	42%
Less than \$25,000	35%	29%
Over \$25,000 but under \$40,000	23%	19%
Over \$40,000 but under \$60,000	16%	20%
Over \$60,000 but under \$80,000	13%	12%
Over \$80,000	13%	22%
18 – 29	36%	22%
30 – 39	25%	21%
40 – 49	18%	20%
50 – 59	14%	15%
60+	8%	22%

A large percentage of the Hispanics in our study immigrated to the U.S., and for the majority their parents immigrated or still live in another country. This sample was collected to focus more on anglers and boaters, and the actual percentage of immigrants among the U.S. Hispanic population is actually somewhat higher. Regardless, it indicates that acculturation may be a major factor with this segment, since there is such a high percentage of the Hispanic segment with strong ties to other countries.

Status	Self	Parents
Born in the U.S.	56%	42%
Immigrated/temporarily living in U.S.	44%	42%

The Hispanic population is concentrated in a few states – with more than 75% located in just 7 states, and more than one-third of these consumers in California. In five of these states, the percentage of the population that is Hispanic is also high – this means that these are the prime states to target to reach this audience.

They are also concentrated within the cities in these states. In fact, the PRIZM data indicates that the Hispanic audience is three times as likely to be located in an urban area, much more likely to be in a second city, and unlikely to live in a rural area or small town. This suggests that a nationwide effort may not be the most efficient, but that for specific states the Hispanic consumer is quite important. Census data shows that throughout the country the Hispanic population is growing, so as this segment grows, its concentration in a few states may change.



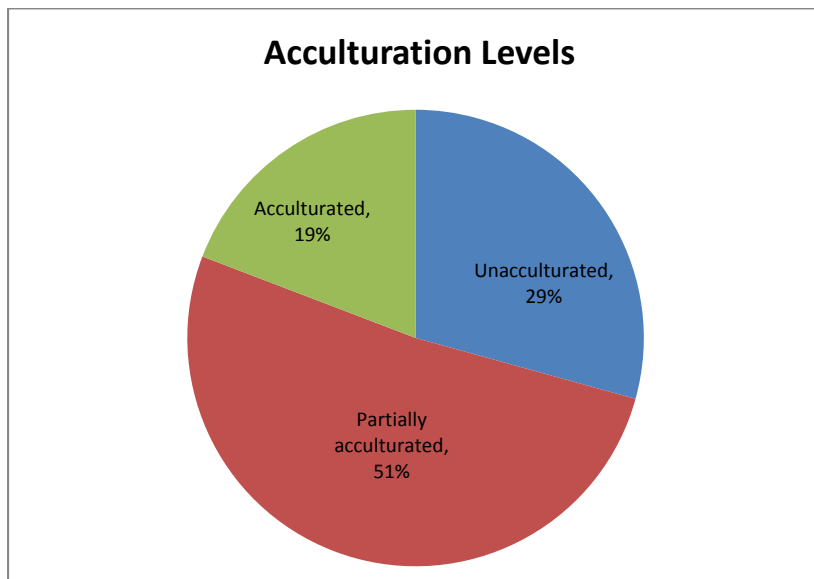
There are several behavioral and attitudinal aspects of the Hispanic culture that are important to note:

- 50% indicate that they speak Spanish when with their family – although most are obviously fairly fluent in English and only a small percentage chose to take the survey in Spanish
 - 49% watch Spanish television stations
 - 64% shop at Hispanic markets
 - 31% read newspapers in Spanish
- 45% indicate that they have close ties to family in another country
- 89% indicate that their family is very important to them

While there is obviously still a strong link to other cultures among the Hispanic audience, these findings indicate that many attitudes are dependent upon the level of acculturation – how much a Hispanic consumer has integrated into the American way of life, and how much the person still connects with the Hispanic culture and their family’s country of origin.

The research also showed that participation in fishing and boating were clearly linked to levels of acculturation. This link will be explored later in the report, but it is important to understand the levels of acculturation among the Hispanic audience.

Several of the questions in the survey, including language usage and ties to family in other countries, were used to determine the level of acculturation. Based on other research on this subject, as well as this research study, about 19% of the Hispanics are fully acculturated, 29% are unacculturated, and the remainder (51%) are partially acculturated.



This information provides an overview of the Hispanic consumer in the U.S. and provides the context for considering their current fishing and boating behavior, and the attitudes and other factors that impact their potential. Next a review of their behavior relating to boating and fishing provides further insight into this segment.

Hispanic Anglers & Boaters

The initial review of the Hispanic segment showed fairly low levels of current participation, but a great deal of potential. This larger survey reinforces that finding, with about 15% reporting current fishing activity and 13% reporting current boating. But the majority falls into the “lapsed” or “interested” categories and therefore offers potential.

Participation	Fishing	Boating
Current Participant	15.2%	13.1%
Potential	56.5%	65.5%
No Interest	28.3%	21.4%

A review of the characteristics of Hispanic/Latino anglers and boaters will provide more background and provide context for considering what differentiates this niche and what type of targeting options exist.

Anglers

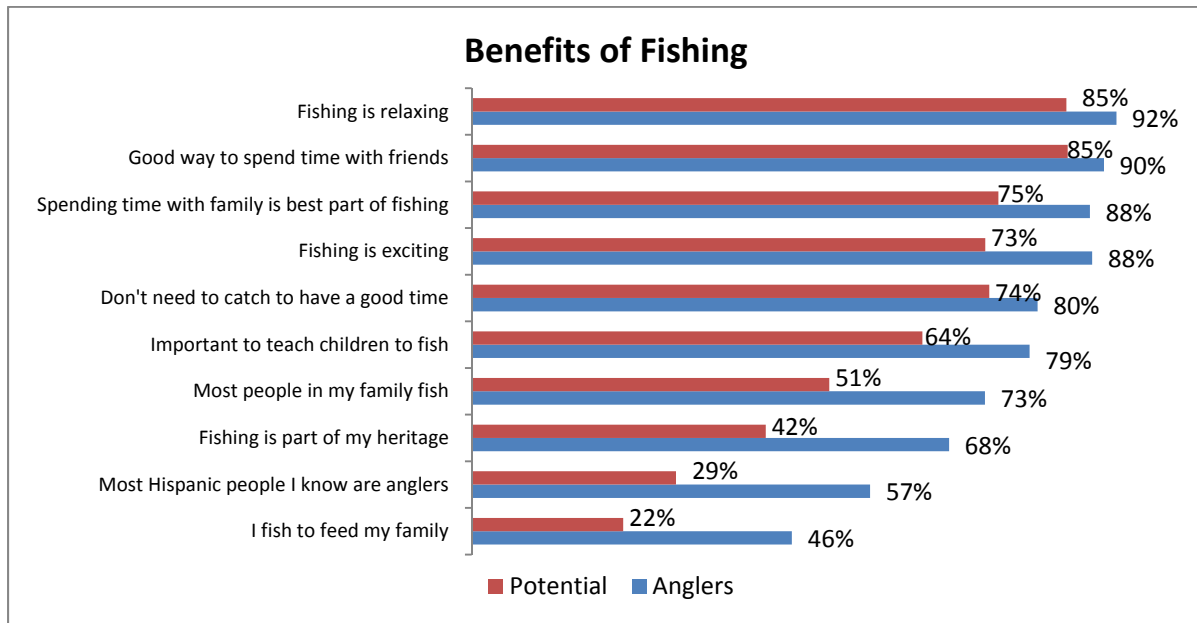
In many ways the Hispanic anglers are similar to other anglers, and a review of their behavior and attitudes will highlight the similarities – and the differences. Both current and lapsed anglers answered questions about fishing

- The Hispanic anglers report that they go fishing about 14 times a year, although the more avid anglers report fishing 20 times during the year. Most of them started fairly young, with the average age being about 14 years old; 50% started under the age of 10.
- Most were introduced to fishing by their parents, with about half mentioning their father and 21% mentioning their mother. This is similar to the non-Hispanic anglers and reinforces the importance of someone to mentor or introduce people to angling.
- Currently fishing companions are most likely to be their spouse (46%), friends (45%) and children (42%).

This group finds fishing both relaxing and exciting, and they see it as a good way to spend time with friends and family. Their Hispanic heritage does play a part in their choice, with 56% indicating that fishing is part of their heritage and 45% indicating that most of the Hispanics they know are anglers.

Attitudes	Agreement
Fishing is relaxing	88%
Fishing is a good way to spend time with friends	87%
Spending time with family is the best part about fishing	82%
Fishing is exciting	81%
I don't need to catch fish to have a good time	77%
It is important to teach children to fish	72%
Most of the people in my family fish	62%
Fishing is part of my heritage	56%
Most Hispanic people I know are anglers	44%
I fish to feed my family	35%

In terms of the benefits of angling (being relaxing and spending time with friends and family), both current and potential anglers share these views. But potential anglers are much less likely to find fishing exciting, to have a heritage that includes fishing, or to have close ties with other anglers. Interestingly, while they are less likely to feel it is important to teach children to fish, 64% still agree with this statement. This suggests that the potential group sees value in angling and can be instrumental in creating the next generation of anglers, but only if they are given the tools and encouragement.



The current anglers are much more involved in all types of outdoor activities compared to those with potential, or those with no interest. They report high levels of hiking, camping and all of the other cross-over activities included. This highlights that the group that has “potential” may present a challenge as they currently have low levels of involvement in other activities that could lead to fishing and boating.

Activity	Current	Potential	No Interest
Boating	50.2%	7.1%	5.2%
Hiking	46.2%	18.5%	15.3%
Camping	43.7%	14.6%	8.3%
Visiting state/nat. park	43.1%	17.2%	14.6%
Wildlife viewing	38.6%	11.5%	9.5%
Outdoor adventure	34.2%	8.1%	10.8%
Target shooting	28.1%	5.0%	2.1%
Hunting	25.2%	1.4%	0.0%

Freshwater fishing is by far the most prevalent, with slightly less than half reporting salt water fishing. Fewer than half indicate fishing from a boat.

Type of Fishing	% Participate
Freshwater fishing	71.8%
Saltwater fishing	46.6%
Fishing from a boat	45.4%
Freshwater fishing from shore or dock	37.8%
Saltwater pier/dock fishing	28.3%
Fly fishing	14.6%
Saltwater surf fishing	12.1%
Fly fishing	9.6%
Spear fishing	4.4%

The majority of Hispanic anglers indicate they usually catch and eat their fish. For the current anglers slightly over half eat their catch, while the lapsed anglers are even more likely to indicate this practice.

Usually...	Current	Lapsed
Catch and release	47.6%	34.8%
Catch and eat	52.4%	65.2%

This group is not generally into catch and release, which may mean a conservation message is less impactful.

When the new segmentation system is applied to the anglers, the majority of the current anglers fall into the two identified target segments – Outdoor Enthusiasts and Family Outdoors. Most of those with no interest fall into the non-target segments. What is interesting is that among those that are lapsed or interested, almost none identify as Outdoor Enthusiasts. Instead, many fall into the Family Outdoors category. Due to the lack of participation in other outdoor activities, many fall into the non-target category also. This suggests that the family aspect will be a crucial message to increase participation among Hispanics who do not currently fish.

Segment	Current	Potential	No Interest
Outdoor Enthusiasts	37.2%	2.4%	2.0%
Family Outdoors	29.1%	32.8%	7.8%
Dabblers	12.9%	7.5%	1.8%
Non-Target	11.2%	42.0%	84.2%
Affable Adventurers	5.3%	9.8%	0.4%
Outdoor Excitement	4.4%	5.5%	3.9%

Current anglers are also much more likely to be unacculturated, or partially acculturated. The role of acculturation will be explored more fully later in the report, but it is an important consideration with this group.

Acculturation	Current	Potential	No Interest
Unacculturated	50.4%	27.5%	22.1%
Partially	36.3	51.4	59.0
Acculturated	13.3	21.1	18.9

Demographically, anglers are more likely to be employed and married. They also tend to be younger and have somewhat higher income.

Demographics	Angler	Potential	No Interest
Employed full-time/self employed	45.2%	34.0%	30.7%
Employed part-time	10.7%	10.4%	9.8%
Unemployed/Student/Disabled	28.5%	34.5%	36.1%
Homemaker	12.8%	14.4%	16.1%
Retired	2.8%	6.6%	7.4%
Average Age	33	36	41
High school graduate/GED or less	33.5%	33.0%	33.5%
Some college/Community college	27.0%	38.4%	37.7%
College+	39.5%	28.6%	28.8%
Single	38.3%	37.6%	41.7%
Married	53.1%	50.0%	47.0%
Separated/Divorced/Widowed	8.5%	12.4%	11.3%
Less than \$25,000	30.5%	35.0%	38.5%
Over \$25,000 but under \$40,000	21.0%	20.5%	28.6%
Over \$40,000 but under \$60,000	19.7%	16.1%	14.8%
Over \$60,000 but under \$80,000	12.2%	14.6%	9.3%
Over \$80,000	16.5%	13.8%	8.7%
Male	47.0%	31.8%	23.5%
Female	53.0%	68.2%	76.5%

The non-anglers give a number of reasons for their lack of participation – interestingly led by not having a license. This might suggest that making that process easier would encourage them, but their lack of participation in other outdoor activities suggests this isn't the case.

The majority also indicate that they like other things better. Among those with no interest, there are concerns ranging from handling fish to the cost and time the activity takes.

The best probability is among those who say they lack skills, as there is some potential to help them gain the skills and thereby embrace the activity.

Reasons	Lapsed	No Interest
No fishing license	68%	61%
No access to a boat	61%	60%
Just like other things better	52%	73%
Lack of skills or expertise	48%	58%
Cost of equipment	45%	55%
Not enough time	43%	35%
Nobody to do it with	43%	41%
No nearby places to fish	37%	31%
Don't like handling fish	37%	65%
Cost of participation	36%	46%
Not sure how to get started	34%	45%
Takes too much time	28%	42%
Inconvenient	28%	46%
Can't swim/afraid of water	24%	39%
Takes time away from family	17%	31%

Boaters

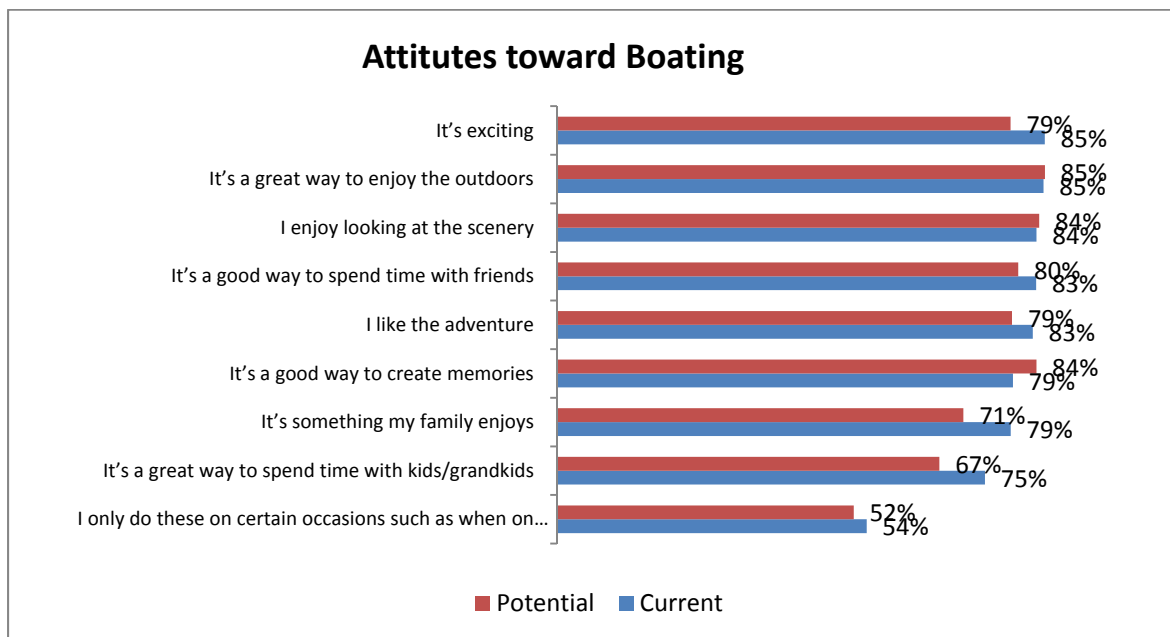
While there is a link between boating and fishing, the review of angling behavior indicated that fewer than half of the anglers indicated that they fished from a boat. A review of the boaters shows that more than 40% of those who indicate that they are current boaters are not current anglers. Therefore, it makes sense to also review the profile of boaters separately.

- The Hispanic boaters report that they go boating about eight times a year, although the more avid boaters report boating 11 times during the year. Most of them started fairly young, with the average age being about 16 years old. Boating doesn't start as soon as fishing, with only about a third started by the time they were 10, but 80% report they had started by the time they were 21. So again, starting people into the activity while they are young seems to be important.
- While fishing is mostly passed through the family, this is not as strongly the case for boating. While the most prevalent "introducer" was the father, (41%), friends were the next most prevalent at 28%. Still, other family members including mother and siblings are also mentioned often, which suggests that a family connection is a surer gateway to boating.
- Yet, the boating companions mentioned most often are friends (53%), followed by spouse (46%) and children (42%).

Boaters are especially avid about other outdoor activities – with the majority reporting current participation in every cross-over activity except hunting. Interestingly, fishing is among the less popular cross-over activities for boaters, suggesting that it may not offer the best gateway. Additionally, the difference between current boaters and those in the potential category are quite striking. The people in the “potential” category have low levels of participation in other outdoor activities, and this suggests it will be harder to reach them and they are not as likely to be involved and captured through the cross-over activities.

Activity	Current	Potential	No Interest
Camping	70.0	16.3	4.9
Visiting state/nat. park	69.5	19.9	7.1
Wildlife viewing	65.8	13.5	4.7
Hiking	65.4	22.7	8.7
Outdoor adventure	62.7	11.1	3.0
Fishing	58.2	9.8	5.2
Target shooting	52.3	5.3	1.2
Hunting	41.6	3.2	0.4

Interestingly both current and potential boaters share a positive attitude toward the activity. Those who are not current boaters are less likely to find it exciting, and less likely to say that it’s something their family enjoys, or a good way to spend time with kids/grandkids. But, it is not negative attitudes that are keeping people from boating.



Instead, access and cost seem to be the biggest barriers. Both the cost of equipment and the cost of participation are noted as key reasons for not boating. As with angling, there is also a need for more information on how to get started and to learn the skills necessary.

Reasons	Lapsed	No interest
Cost of equipment	67%	63%
No access to a boat	67%	64%
Cost of participation	58%	58%
Lack skills or expertise	56%	61%
Just like other things better	45%	62%
Nobody to do it with	39%	46%
Not sure how to get started	39%	51%
Not enough time	37%	49%
No nearby place to boat	35%	42%
Inconvenient	31%	49%
Takes too much time	28%	44%
Can't swim/afraid of water	25%	38%
Takes time away from family	20%	38%

When the segment distribution is considered, it is surprising that among the Hispanic avid boaters, almost all fall into the Outdoor Enthusiast group, with few in the Family Outdoors segment. This is due to their high involvement in so many outdoor activities. Among those who indicate some interest, the largest group is among Family Outdoors. Again, with the Hispanic audience, increasing participation may come from promoting a family friendly message.

Segment	Current	Potential	No Interest
Outdoor Enthusiasts	64.3	5.3	0.3
Family Outdoors	20.4	32.7	2.7
Outdoor Excitement	4.9	6.1	0.4
Affable Adventurers	4.4	7.7	1.3
Dabblers	3.2	10.6	0.0
Non-Target	2.7	37.6	95.3

As with fishing, the current boaters are much more likely to be unacculturated, or only partially acculturated. Although, when those who are boaters, and not anglers (boat only in the table below), are considered, they are more similar to the rest of the Hispanic audience, and most are at least partially acculturated.

Acculturation	Current	Boat Only	Potential	No Interest
Unacculturated	45.4	31.4	29.1	20.7
Partially	40.6	51.3	50.8	59.2
Acculturated	14.0	17.3	20.1	20.1

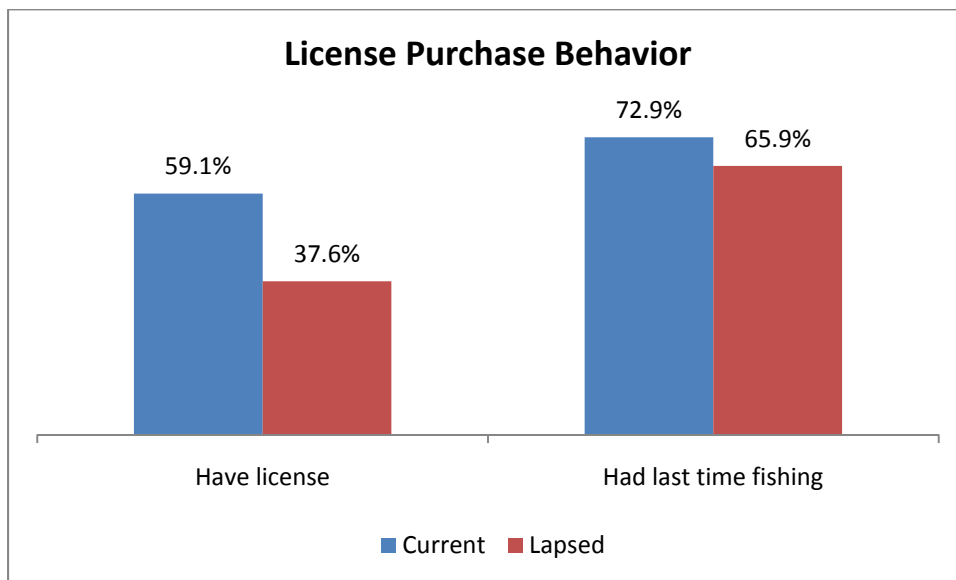
While the boaters are more likely to be unacculturated, they are more educated, have a higher income, are younger, and more likely to be single.

Demographics	Boaters	Potential	No Interest
Employed full-time	40.7%	34.1%	27.0%
Employed part-time	9.6%	11.1%	8.1%
Unemployed/Student/Disabled	26.9%	34.1%	38.2%
Homemaker	9.8%	14.7%	17.6%
Retired	3.1%	6.0%	9.0%
Average Age	32	37	42
High school grad/GED or less	30.1%	32.3%	37.8%
Some college/Community college	29.0%	37.6%	37.5%
College degree	32.8%	22.6%	16.2%
Graduate degree or more	8.1%	7.5%	8.4%
College+	40.9%	30.1%	24.6%
Single	44.0%	39.9%	32.6%
Married	49.3%	49.9%	49.2%
Separated/Divorced/Widowed	6.8%	10.2%	18.2%
Less than \$25,000	29.6%	34.7%	40.8%
Over \$25,000 but under \$40,000	16.6%	23.5%	25.0%
Over \$40,000 but under \$60,000	15.7%	16.4%	16.4%
Over \$60,000 but under \$80,000	17.8%	13.0%	9.0%
Over \$80,000	20.3%	12.5%	8.8%
Male	41.4%	31.1%	27.6%
Female	58.6%	68.9	72.4%

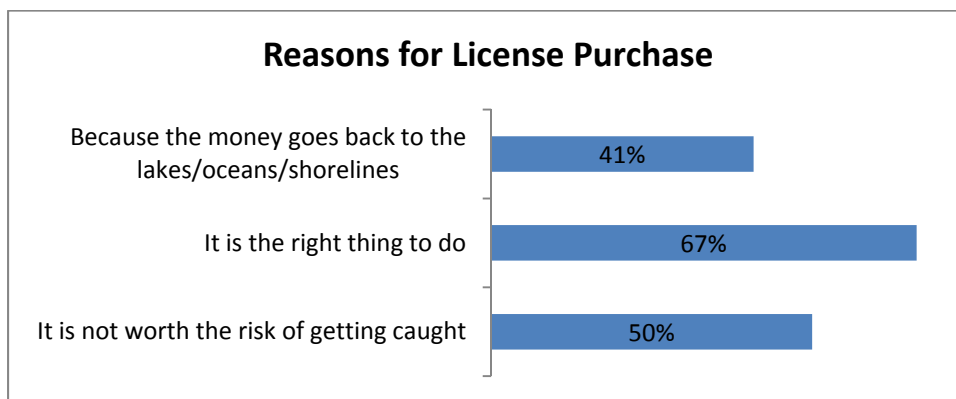
Licensing

One specific issue of interest among anglers generally, and specifically among the Hispanic segment, is whether they are prone to buy a fishing license, and how to promote purchasing a license among this group.

In some ways, the potential among this group seems great, as only 13.7% currently have a fishing license. But among those who indicate that they have fished in the past year, this represents 59% of those who are current anglers. The percentage that indicate they had a license the last time they went fishing is higher – but still below 75%. So, it would seem that there are two challenges with this group – first to encourage angling, but secondly to get them to actually purchase a license.



In indicating why they chose to purchase a license, the strongest agreement was with the sentiment that it was simply the right thing to do. Fear of being caught is also important, with conservation being the least meaningful message.



In exploring why they don't have a license, the reasons differ depending on the level of fishing. With both current and lapsed anglers, a significant number indicated that they intended to get a license. For lapsed anglers, the most common reason is that they don't fish often enough. For current anglers, mostly they don't have a reason and indicate they will buy one. Yet, given the fact that there was a significant percentage that didn't have license last time they fished, it is likely that their "intentions" are better than their actual follow through.

	Current	Lapsed
Too expensive	12%	7%
Inconvenient	8%	4%
I should not have to pay for something nature provides	8%	7%
I don't fish often enough	10%	35%
Chances of getting caught without a license are small	2%	5%

In terms of where they most recently purchased a license, Walmart is the most popular, followed by the bait/tackle shop. One of the most interesting findings is that current anglers are much more likely to have purchased a license online. It may be that they are more familiar with this option, but it would seem that promoting this could help increase the percentage with a license.

	Current	Lapsed	Total
Online	27.4%	9.7%	21.2%
Bait/Tackle shop	23.7%	27.2%	24.9%
Gas station	3.9%	1.3%	3.0%
Walmart	27.7%	31.1%	28.9%
Sporting goods store	13.1%	27.3%	18.0%
Drug store	0.5%	0.0%	0.3%
Other (Please specify)	3.7%	3.5%	3.6%

Impact of Acculturation

The review of current anglers and boaters indicated that the less acculturated Hispanic consumer is more likely to participate in these activities. Therefore, it is important to assess the role of acculturation and how it impacts efforts to influence this audience.

Demographically, the unacculturated are younger, more likely to be employed & married but with lower educational levels and household income.

Demographics	Unacculturated	Partially Acculturated	Acculturated
Age	34.0%	38.6%	38.7%
Employed full-time	37.5%	33.7%	32.1%
Employed part-time	10.9%	11.1%	7.1%
Unemployed/Out of work	32.3%	33.7%	38.2%
Homemaker	16.5%	13.5%	14.6%
Retired	2.8%	7.9%	7.1%
High school graduate or GED	38.9%	31.0%	30.4%
Some college/Community college	33.9%	35.7%	42.3%
College degree or more	27.2%	33.2%	27.2%
Single	35.3%	39.2%	43.6%
Married	55.0%	49.9%	40.8%
Separated/Divorced/Widowed	9.8%	10.9%	15.6%
Less than \$25,000	44.8%	33.0%	27.9%
Over \$25,000 but under \$40,000	19.8%	24.0%	24.6%
Over \$40,000 but under \$60,000	13.5%	17.2%	17.7%
Over \$60,000 but under \$80,000	13.7%	11.8%	13.7%
Over \$80,000	8.2%	14.0%	16.1%

In terms of the segments that have been created for targeting, the major difference between the acculturated and unacculturated is the prevalence of Outdoor Enthusiasts. With the strong focus on family, the biggest segment among each of these groups is Family Outdoors. But, among the partially and fully acculturated segments, there are far fewer Outdoor Enthusiasts, and more people who are classified as non-targets.

Segment	Partially		
	Unacculturated	Acculturated	Acculturated
Family Outdoors	28.4%	21.6%	27.0%
Outdoor Enthusiasts	20.9%	8.7%	7.1%
Dabblers	7.8%	7.0%	7.4%
Affable Adventurers	6.2%	6.4%	4.0%
Outdoor Excitement	2.5%	5.5%	6.2%
Non-Target	34.2%	50.7%	48.3%

In some ways, attitudes and behaviors of the acculturated and non-acculturated Hispanics are similar. Across the board the Hispanic consumer feels that family and friends are very important. They generally like diversity and feel comfortable among people from different backgrounds. Interestingly, across the board this group is hesitant to seek opportunities to expose themselves to non-Hispanic opportunities.

Agreement Ratings on 5-pt. scale	Unacculturated	Partially Acculturated	Acculturated	Total
My family is extremely important to me	4.8	4.5	4.5	4.6
There are positive aspects to the diversity in the U.S.	4.4	4.1	4.1	4.2
I feel comfortable among people from different backgrounds than my own	4.3	4.1	4.2	4.2
My friends are extremely important to me	4.3	4.1	4.2	4.2
Seek opportunities to expose myself to things non-Hispanic	3.1	2.8	3.0	2.9

As might be expected, the biggest differences among the unacculturated relate to their preference for Spanish. Those who are unacculturated prefer the Spanish language for both communication with family and for media consumption. At the same time, while the unacculturated are closely connected to the Hispanic culture, because they tend to be younger they also are more likely to be technologically savvy and more likely to eat fast food.

Attitude & Behavior	Partially			Difference
	Unacculturated	Acculturated	Acculturated	
I usually speak Spanish when with my family	4.5	3.2	1.3	3.1
I usually watch movies in Spanish	3.9	2.0	1.1	2.8
I have close ties to family in another country	4.2	3.1	1.5	2.7
Watch Hispanic television stations	3.5	2.2	1.2	2.3
Read or listen to news regarding Hispanics	3.6	2.4	1.5	2.1
Read newspapers in Spanish	3.0	1.7	1.1	1.9
I feel like I am sometimes discriminated against	3.7	2.9	1.9	1.8
I usually eat traditional Hispanic foods	4.5	3.6	2.9	1.6
I feel like a minority	3.5	2.7	1.8	1.6

Attitude & Behavior	Partially			Difference
	Unacculturated	Acculturated	Acculturated	
Shop at Hispanic markets	3.5	2.6	1.9	1.6
Attend Hispanic-oriented events	3.1	2.3	1.6	1.6
Religion is an important part of my life	4.2	3.7	3.2	1.0
Most of my family and friends live in the U.S.	3.8	4.1	4.8	-1.0
I eat a lot of fast food	3.2	2.8	2.6	0.6
I am an early adopter of technology	3.7	3.3	3.2	0.6

The higher adoption rate of technology is supported by the information on usage of Facebook and Twitter. The unacculturated indicate higher usage of both these options. This probably relates to the fact that this audience is younger, and may also relate to having more family and friends in other countries and using technology to keep in touch. Regardless, this suggests that online sources are a viable option to reach this audience.

	Unacculturated	Partially Acculturated	Acculturated
Facebook			
At least daily	55.4%	50.5%	46.0%
Several times a week	16.4%	14.7%	15.1%
Every couple of weeks	9.3%	8.5%	10.0%
Seldom	6.5%	6.7%	4.9%
Never	12.4%	19.6%	24.1%
Twitter			
At least daily	16.8%	4.9%	6.9%
Several times a week	9.6%	6.8%	2.8%
Every couple weeks	7.2%	5.9%	5.3%
Seldom	13.3%	9.5%	10.6%
Never	53.1%	72.9%	74.3%

Again reviewing the findings relating to the level of acculturation among current anglers and boaters, it is clear that the unacculturated are much more likely to be participants, and the most acculturated are least likely. Therefore in developing the strategies to increase participation among the Hispanic audience, the differences due to acculturation will need to be integrated into the marketing efforts.

Acculturation	Anglers	Boaters	U.S.
Unacculturated	50%	45%	29%
Partially	36%	41%	51%
Acculturated	14%	14%	19%

Conclusions & Recommendations

The research among the Hispanic audience was prompted as part of the process of identifying the best targets for future marketing and promotional efforts. The Hispanic population in the U.S. is large – and growing significantly. Additionally, there was evidence from prior research that a heritage of fishing might exist within this group that would make them a strong target.

The findings do support a link between the Hispanic cultural heritage and angling, with a lesser link to boating. Given this link is related to the Hispanic heritage, it is much stronger among the segment of the population that is less acculturated. As might be expected, as they become acculturated, Hispanics react and behave like other segments of the population.

Among the acculturated Hispanics there are significant numbers of people classified in the growth target group – Family Outdoors. Therefore, programs targeting this segment will work, and there is not a need for a specific program aimed at acculturated Hispanics.

There does seem to be opportunity to target the less acculturated groups, but there are limitations to these opportunities:

- While the Hispanic population is large and growing, it is concentrated in a few key states. Efforts to reach the Hispanic audience with targeted messages should probably be focused in these areas, rather than nationally. Programs that target California, Texas, Florida, Arizona and Nevada will reach a large portion of this audience.
- Current Hispanic anglers are fairly avid already, and the key opportunity with this group seems to be promoting more license sales. Since these are the least acculturated, these efforts need to be in Spanish. Luckily, this group tends to be technologically savvy, so online efforts can be used for these promotions.
- The message that seemed to resonate most with this group as a reason to purchase a license is “It’s the right thing to do.” They were not as positive about the conservation message, so specific messages for this audience will need to be developed, if it is targeted.
- Convenience in purchasing a license also seems critical. Since this group tends to be more technologically savvy, a key initiative might be promoting online license purchase.
- The current boaters among the Hispanic audience are hard-core outdoor people and participate in a wide number of outdoor activities. They are more likely to go hiking, camping, and participate in other outdoor activities than fishing. And, the Hispanics who are not boaters are unlikely to do these things. So using these activities as the key points for promoting boating is probably the best way to reach this audience and increase participation in boating.
- There was a fairly large group of Hispanics who are not current boaters or anglers, but who indicated interest. While the potential seems large, these consumers do not participate in other outdoor activities, so they will probably be hard to reach and hard to convert. Their potential is actually probably fairly limited.

Appendix – Questionnaire

RBFH Hispanic Survey 4/13/11

USING BOTH ENGLISH AND SPANISH VERSIONS

Thank you for visiting our survey. Your opinions are valuable to us! This survey is about how you spend your leisure time. This is for research purposes only; no sales effort will ever result from your participation. Before you begin, there are a couple of things to note about the survey:

- Us the *Next* and *Previous* buttons to navigate through the survey.
- To stop at any point, close your browser window. You will not be able to re-enter the survey.

ZIP. First, what is your ZIP code? _____

S1. Are you of Hispanic, Latino or Spanish origin?

- Yes
 No

TERMINATE IF S1 DOES NOT EQUAL 1

1. Please select which of the following best describes how often you participate in each of the following activities:

	Every chance you get	Often	Occasionally when you have an opportunity	You've done it, but it was over a year ago	You have not done it, but would like to try sometime	You have never done it and probably never will
Camping						
Hunting						
Hiking						
Fishing (freshwater, saltwater, or fly fishing)						
Boating (motor boating, canoeing, kayaking, or sailing)						
Wildlife viewing or bird watching						
Visiting a state or national park						
Target shooting						
Outdoor adventure activities such as rock climbing, sky diving, zip lining, mountain biking, etc.						

2. Thinking about the activities we have discussed that you do, how much do you agree that the following describe something that motivates you to participate?

	1 Completely Disagree	2	3	4	5 Completely Agree
It's exciting					
I like the adventure					
It's a good way to spend time with friends					
I only do these on certain occasions such as when on vacation and looking for an activity					

It's a great way to spend time with kids/grandkids					
It's a great way to enjoy the outdoors					
It's a good way to create memories					
I enjoy looking at the scenery					
It's something my family enjoys					

3. Thinking about the activities we have discussed that you do, which of the following best describes you?

- I like many of these outdoor activities, but would not consider myself avid about any of them
- I am avid about these activities and would consider myself an outdoor enthusiast
- I enjoy participating in these outdoor activities with my family
- I participate in these outdoor activities for the adventure and excitement
- I enjoy the social and adventure aspects of these outdoor activities
- None of these describe me

ASK Q4 – Q7 FOR FISHING AND BOATING INDEPENDENTLY IF THEY FISH OR BOAT AT LEAST OCCASIONALLY.

4. When you participate in (ACTIVITY), who typically participates with you?

Please mark all that apply

- No one, I go alone
- Children
- Grandchildren
- Spouse
- Father
- Mother
- Grandfather(s)
- Grandmother(s)
- Sibling(s)
- Aunt(s)/Uncle(s)
- Cousin(s)
- Other family
- Friend(s)
- Other, please specify _____
- None of these

5. How old were you when you first started (ACTIVITY)? _____

6. Who did you first go (ACTIVITY) with? Please mark all that apply

- No one, I went alone
- Children
- Grandchildren
- Spouse
- Father
- Mother
- Grandfather(s)
- Grandmother(s)
- Sibling(s)
- Aunt(s)/Uncle(s)
- Cousin(s)
- Other family
- Friend(s)

- Other, please specify _____
- None of these

7. About how many times per year would you say you go (ACTIVITY)? _____

ASK Q8 – Q15 IF THEY FISH AT LEAST OCCASIONALLY FROM Q1

8. What kind(s) of fishing do you participate in? Please select all that apply.

- Freshwater fishing
- Saltwater fishing
- Fly fishing
- Saltwater surf fishing
- Saltwater pier/dock fishing
- Fly fishing
- Freshwater fishing from shore or dock
- Fishing from a boat
- Spear fishing

9. When you go fishing, do you usually...

- Catch and release
- Catch and keep to eat

10. Please indicate how much you agree with the following statements about fishing.

	Mostly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Mostly Disagree
ROTATE					
I fish to feed my family	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fishing is part of my heritage	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Most of the people in my family fish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fishing is exciting	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I don't need to catch fish to have a good time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spending time with family is the best part about fishing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Most Hispanic people I know are anglers	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fishing is relaxing	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fishing is a good way to spend time with friends	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
It is important to teach children to fish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

11. When you last went fishing did you have a fishing license?

- Yes
- No

12. Do you currently have a fishing license?

- Yes
- No

IF Q12 = YES, ASK Q13 & Q14

13. Where did you most recently purchase your fishing license?

- Online
- Bait/Tackle shop
- Gas station
- Wal-Mart

- Sporting goods store
- Drug store
- Other, please specify _____

14. Why did you buy a fishing license? Please select all that apply
- It is not worth the risk of getting caught
 - It is the right thing to do
 - Because the money goes back to the lakes/oceans/shorelines

ASK Q15 IF Q12 = NO

15. Why do you not have a fishing license? Please select all that apply.
- Too expensive
 - Inconvenient
 - I should not have to pay for something nature provides
 - I don't fish often enough
 - Chances of getting caught without a license are small
 - Other, please specify _____

ASK Q16 FOR BOTH FISHING AND BOATING INDEPENDENTLY IF THEY DO NOT FISH OR DO NOT BOAT AT LEAST OCCASIONALLY.

16. Earlier you said you have not (FISHED/BOATED) in the last year. Please indicate how much you agree or disagree that the following represent your reasons for not (BOATING/FISHING).

	Mostly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Mostly Disagree
ROTATE					
Not enough time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost of equipment	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Cost of participation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No nearby places to (BOAT/FISH)	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Inconvenient	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Not sure how to get started	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No fishing license	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No access to a boat	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lack of skills or expertise	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Don't like handling fish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can't swim/afraid of water	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Takes time away from family	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Nobody to do it with	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Takes too much time	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Just like other things better	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

17. Which of these best describes you?
- I was born in the United States
 - I immigrated to the United States
 - I am temporarily visiting the United States
18. Which of the following best describes your parents?
- They were born in the United States
 - They immigrated to the United States

19. Please indicate how much you agree with the following statements.

	Mostly agree	Somewhat agree	Neither agree nor disagree	Somewhat disagree	Mostly Disagree
ROTATE					
My family is extremely important to me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I have close ties to family in another country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
My friends are extremely important to me	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I seek opportunities to expose myself to things non-Hispanic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I feel comfortable among people from different backgrounds than my own	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
There are positive aspects to the diversity in the U.S.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I feel like I am sometimes discriminated against	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Most of my family and friends live in the U.S.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I usually speak Spanish when with my family	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I am an early adopter of technology	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I usually watch movies in Spanish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I usually eat traditional Hispanic foods	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I eat a lot of fast food	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Religion is an important part of my life	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
I feel like a minority	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

20. Please indicate how frequently you do the following:

	Often	Sometimes	Seldom	Never
ROTATE				
Read or listen to news regarding Hispanics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Read newspapers in Spanish	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Watch Hispanic television stations	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shop at Hispanic markets	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Attend Hispanic-oriented events	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Seek opportunities to expose myself to things non-Hispanic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

21. How often do you use or access the following?

	At least daily	Several times a week	Every couple weeks	Seldom	Never
Facebook					
Twitter					

ASK IF THEY FISH OR BOAT AT LEAST OCCASIONALLY FROM Q1

22. When you are looking for information on boating or fishing, how often do you use the following resources

	Often	Sometimes	Seldom	Never
Facebook				
Twitter				

Internet sites about fishing				
Internet sites about boating				
TakeMeFishing.com				
Fishington				
gofishn.com				
ifish.net				
anglingmasters.com				
getreeled.com				

23. How many people currently live in your household? _____

ASK Q21 & Q22 IF Q20 > 1

24. How many of these people are under the age of 18? _____

25. Which of the following currently live in your household? Please select all that apply.

- Children
- Grandchildren
- Spouse
- Father
- Mother
- Grandfather(s)
- Grandmother(s)
- Sibling(s)
- Aunt(s)/Uncle(s)
- Cousin(s)
- Other family
- Friend(s)
- Other, please specify _____
- None of these

26. Are you currently...

- Employed full-time
- Employed part-time
- Self-employed
- Unemployed/Out of work
- Student
- Homemaker
- Retired
- Disabled

27. What is the highest level of education that you have completed?

- Less than high school graduate
- High school graduate or GED
- Some college/Community college
- College degree
- Graduate degree or more

28. Are you...

- Single
- Married
- Separated
- Divorced
- Widowed

29. Which of the following categories best represents the total annual income for your household before taxes (Please include income from all sources.)

- Less than \$12,000
- Over \$12,000 but under \$25,000
- Over \$25,000 but under \$40,000
- Over \$40,000 but under \$60,000
- Over \$60,000 but under \$80,000
- Over \$80,000 but less than \$100,000
- Over \$100,000 but less than \$150,000
- \$150,000 or more

30. Are you? _____

- Male
- Female

31. May we please have your age? _____

THANK YOU FOR PARTICIPATING IN THIS SURVEY