

# **A Survey of Lapsed Anglers**

conducted for

**The Recreational Boating & Fishing Foundation**

by

**Southwick Associates, Inc.**

PO Box 6435

Fernandina Beach, FL 32035

Ph (904) 277-9765 • Fax (904) 261-1145

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## Executive Summary

During the winter of 2009-10, an online survey of anglers was conducted on behalf of the Recreational Boating and Fishing Foundation (RBFF) and nine state partners in the 2009 Lapsed Angler Direct Mail Marketing Program. The purpose of the survey was to gain insights into people's motivations for fishing, the effectiveness of recent fishing license marketing efforts, and the approaches to test in the 2010 Lapsed Angler Direct Mail Marketing Program. The survey focused on the reasons that people fish, the factors that motivate their decisions to buy fishing licenses, issues that might prompt them to fish more often, and incentives that might sway their license buying decisions. The survey also presented respondents with images and messages to guide development of the 2010 Lapsed Angler Direct Mail Marketing Program.

### ***Reasons to Go Fishing***

- By far, the primary reason to fish is “to spend time outdoors” (68%). No other reason was selected by at least half of the respondents.
- Between 45% and 50% of the respondents fish...
  - “to get away from the stresses of everyday life”
  - “for the excitement of the catch”
  - “to spend time with family”
- Lower income anglers are almost three times more likely than high income anglers to select to “fish to provide food for the table” as one of their top reasons.
- High income anglers are more likely to fish to “spend time with family” and “spend time with friends.”
- Women are more likely than men to fish to “spend time with family,” while men are more likely than women to fish to “spend time with friends.”
- Urban residents are more likely to fish to “get away from the stresses of everyday life.”

### ***Motivations to Buy Fishing Licenses***

- Over one-half of the respondents (55%) need no motivation to buy a license, indicating that they “will buy a license no matter what.”
- Supporting conservation and fishery management was the factor most likely to motivate anglers to buy a license next year. Approximately 45% would buy a license if they “knew that 100 percent of my money went to conservation and to ensure fishing opportunities.”
- No other motivating factor was selected by more than 21% of the respondents.
- Affordability and having a better chance at catching fish are more important to lower income anglers than high income anglers.
- Higher income anglers valued convenience in purchasing a license (online sales) and knowing where to go more than lower income anglers.

### ***Factors that Might Encourage Anglers to Spend More Time Fishing***

- Local accessibility (i.e. spending less time getting to a fishing spot) is the key factor that determines why people don't fish as much as they might otherwise. Over one-half of the respondents would fish more... “If I knew places to fish close to home within 30 to 60 minutes.”

- There was no pattern in the next most important responses. Approximately one-third of those surveyed would fish more...
  - “If I had someone to go with such as a friend or relative”
  - “If my spouse partner was interested in going”
  - “If I knew better ways to catch a fish so I would have more success”
- Knowing where to fish in their state regardless of the distance from home, and fishing with family (children/spouse) are more important reasons for higher income anglers than for lower income anglers.
- For lower income anglers, having a friend/relative to go fishing with, or having access to a boat are two factors that would encourage them to fish more.
- Knowing where to go and having access to a boat are more important to urban than rural anglers.

### ***Use of Incentives to Promote Increased Purchases of Fishing Licenses***

- Free information appears to be an important incentive to persuade people to buy a fishing license.
  - Nearly 56% of the respondents might be persuaded to buy a license if the “state agency would give you a free subscription to their fish and wildlife conservation magazine.”
  - Nearly 40% of respondents might be persuaded to buy a license if they could “receive a free brochure describing where to fish in your state and how to fish in your state.”

### ***Advertising Recall and Impressions***

- Of the advertising that anglers saw or heard in 2009 that promoted fishing or encouraged them to fish, over three-quarters of all anglers (80%) recalled seeing magazine ads.
- The fewest number of respondents recalled hearing radio advertising that promoted fishing during 2009 (18%).

### ***Messaging to Increase Interest in Fishing***

- Overall, the message “The memories are always bigger than the fish” was preferred by 54% of survey respondents, followed by:
  - “Share a pastime that can last a lifetime” 49%
  - “Parents don't frame pictures of their kids playing video games” 43%
  - “Give yourself the license to relax” 35%
  - No other message was selected by more than one-fourth of the respondents.
- Several message preferences were related to demographics:
  - “The fish bites the lure, and yet you’re the one who’s hooked” was preferred by lower income anglers.
  - “The memories are always bigger than the fish” was preferred by older, rural anglers.
  - “Parents don’t frame pictures of their kids playing video games” was preferred by anglers age 25 to 44.

### ***Images to Increase Interest in Fishing***

- Overall, the image titled “Pontoon Family” was preferred by 36% of survey respondents, followed by:
  - “Sunrise” 28%
  - “Family Fishing” 21%
  - “Thrill of the Catch” 15%
- There are clear image preferences by selected demographic groups:
  - “Pontoon Family” is preferred by anglers with higher incomes and from more rural areas.
  - “Sunrise” is preferred more by younger, lower income anglers.

### ***Analysis by Response to the 2009 Lapsed Angler Direct Mail Marketing Program***

- Thirty-seven percent of anglers who responded to the direct mail program (i.e. bought a license during the evaluation period) recalled seeing a direct mailer, compared to 31% of anglers who did not buy a license in response to the direct mail program.

### ***Characteristics of Current Versus Lapsed Anglers***

- The reasons why people fish, their motivations to buy a license, receptiveness to incentives, recall of advertising, or their preferences for advertising messages and images did not have any significant differences between anglers who had lapsed, and those who remained active. Please note that the study sample included only a small number of anglers who did not lapse in 2008 and these were from only two states. Regardless, the limited evidence suggests there are no distinctive characteristics between active and recently lapsed anglers.

### ***Tapestry Analysis***

- While a majority of anglers in the survey indicated that they needed no motivation to buy a license, Southern Satellites (Tapestry 42) stand out with over 76% indicating that they would “buy no matter what.”
- Over one-half of all anglers selected “a free subscription to their fish and wildlife conservation magazine” as their most preferred incentive to buy a license. This incentive is especially desirable to Southern Satellites (Tapestry 42) anglers. Whether or not that incentive would make any difference in their purchase decisions is confounded by the finding that they are the most likely to buy a license regardless of motivation.
- Anglers in none of the ten largest Tapestry segments showed any differences with respect to their recall of any radio or direct mail advertising in 2009.
- “Pontoon Family” was the most selected image across all anglers, although only 36% selected it as their top choice overall. That image stood out for anglers in Tapestry 26 (Midland Crowd), which is made up of middle income married families living in rural towns and villages. Surprisingly, that image garnered the fewest selections from another family-centered audience – Tapestry 12 (Up and Coming Families). Although that group is also comprised of families, its members have higher incomes and live in more suburban settings.

The results presented in the Executive Summary are a general overview and are not a definitive summary of the significant results. The reader is strongly encouraged to read the full results within this report to best inform future marketing efforts.

# A Survey of Lapsed Anglers

## I. Introduction

During the winter of 2009-10, an online survey of anglers was conducted on behalf of the Recreational Boating and Fishing Foundation (RBFF) and nine state partners<sup>1</sup> in the 2009 Lapsed Angler Direct Mail Marketing Program (Appendix A). The goal of the survey was to gain insights into people's motivations for fishing and the effectiveness of recent fishing license marketing efforts.

The survey focused on the reasons that people fish, the factors that motivate their decisions to buy fishing licenses, issues that might prompt them to fish more often, and incentives that might sway their license-buying decisions. The survey also included questions designed to provide insight into the approaches to test in the 2010 Lapsed Angler Direct Mail Marketing Program. Respondents were asked about their recollections of advertising in various media, and their preferences for messages and imagery that were used in the 2009 program.

## II. Survey Sample

Email addresses were collected from nine state fish and wildlife agencies chosen for regional representation, availability of email addresses, and participation in the RBFF 2009 Lapsed Angler Direct Mail Marketing Program. An initial list of 28,000 email addresses was compiled from the lists provided by the participating state agencies. The emails were linked to databases constructed for the lapsed angler program and included lapsed anglers who were sent direct mail in 2009 (treatment groups) and lapsed anglers who were not sent direct mail (control groups). Both groups included anglers who purchased a license in 2009 in response to the direct mail program, and those who did not purchase a license in 2009 during the evaluation period. A small number of emails were included from anglers in Iowa and Oregon who were part of retention programs and therefore had not lapsed in 2008.

After removing improper email addresses (based on spelling and configuration), 27,742 emails were sent on December 17, 2009 to invite the recipients to participate in an online survey. That mail list included eight seed names used to track the email campaign. Of the total emails sent, 5,978 were returned as undeliverable, leaving a delivered base of 21,764 emails. Two follow-up emails were sent approximately one week apart to anglers who had not responded to the previous survey invitations. The survey closed on January 12, 2010 with 3,246 responses. The overall response rate was 15.0% (Table 1).

The resulting sample of anglers is shown in Table 2, including those who received direct mail advertising in 2009 (treatment group) and those who did not (control group), and those who

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<sup>1</sup> States participating in the survey were Alabama, Colorado, Florida, Iowa, New Jersey, Oregon, South Carolina, Utah and Virginia.

bought and did not buy during the evaluation period. A subsequent comparison of the distribution across states of anglers in the sample to all anglers in those states found a disproportionate number in the sample that might affect the analysis (Table 3). To account for these differences, weights were calculated and applied to the data. All results presented in this report are based on the weighted sample.

**Table 1. Mailout and Response Rate by State**

State	Sent Emails	Bounced Emails	Valid Emails	Responses					
				12/29/2009		1/5/2010		1/12/2010	
				#	%	#	%	#	%
AL	1,294	248	<b>1,046</b>	40	3.1%	67	5.2%	<b>93</b>	<b>8.9%</b>
CO	7,671	1,542	<b>6,129</b>	394	5.1%	698	9.1%	<b>1,032</b>	<b>16.9%</b>
FL	6,952	2,030	<b>4,922</b>	190	2.7%	342	4.9%	<b>479</b>	<b>9.7%</b>
IA	1,116	85	<b>1,031</b>	76	6.9%	145	13.1%	<b>203</b>	<b>19.8%</b>
NJ	4,279	745	<b>3,534</b>	240	5.6%	377	8.8%	<b>524</b>	<b>14.9%</b>
OR	1,146	183	<b>963</b>	145	12.8%	217	19.1%	<b>291</b>	<b>30.4%</b>
SC	1,503	433	<b>1,070</b>	54	3.7%	83	5.6%	<b>107</b>	<b>10.1%</b>
UT	2,954	617	<b>2,337</b>	158	5.3%	245	8.3%	<b>343</b>	<b>14.7%</b>
VA	827	94	<b>733</b>	88	10.9%	128	15.7%	<b>174</b>	<b>24.0%</b>
<b>Total</b>	<b>27,742</b>	<b>5,978</b>	<b>21,764</b>	<b>1,385</b>	<b>5.0%</b>	<b>2,302</b>	<b>8.3%</b>	<b>3,246</b>	<b>15.0%</b>

*Original email:* 12/17/2009

*First reminder:* 12/29/2010

*Second reminder:* 1/5/2010

**Table 2. Distribution of Email Survey Responses**

State	Treatment Group		Control Group		Total
	Purchased	No Purchase	Purchased	No Purchase	
AL	3.6%	4.3%	0.2%	0.9%	<b>2.9%</b>
CO	33.8%	29.1%	35.8%	32.1%	<b>31.8%</b>
FL	6.2%	5.8%	31.1%	31.7%	<b>14.8%</b>
IA	7.7%	7.1%	3.6%	4.6%	<b>6.3%</b>
NJ	23.4%	15.1%	15.1%	10.5%	<b>16.1%</b>
OR	9.8%	10.0%	5.9%	8.0%	<b>9.0%</b>
SC	3.6%	3.3%	4.3%	2.4%	<b>3.3%</b>
UT	6.2%	18.9%	1.1%	5.4%	<b>10.6%</b>
VA	5.8%	6.3%	2.9%	4.6%	<b>5.4%</b>
<b>All</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>	<b>100.0%</b>

**Table 3. Angler Distribution across States and Sample Weighting**

State	2007 Anglers	Survey Respondents	Weight
AL	9.6%	2.9%	3.350
CO	13.8%	31.8%	0.433
FL	22.8%	14.8%	1.544
IA	8.7%	6.3%	1.387
NJ	4.4%	16.1%	0.273
OR	12.5%	9.0%	1.394
SC	10.8%	3.3%	3.271
UT	7.7%	10.6%	0.727
VA	9.8%	5.4%	1.826

Survey key elements are presented below. In most survey questions, people were asked to select their top three responses. In the summary tables, the responses were tabulated and ordered by the percent of respondents who selected each item as one of their three responses. Each summary table is followed by a series of cross-tabulations to identify selected demographic characteristics of anglers that relate to their survey responses. The intent of the cross-tabulations is to inform any decisions to target marketing efforts to particular sub-populations of anglers.

### **III. Reasons, Motivations and Incentives for Fishing**

The survey explored several aspects of the reasoning and motivations for buying a license and going fishing, and which factors might encourage anglers to spend more time fishing. One question in the survey also asked anglers to indicate their preferences for a series of actual and proposed incentives designed to encourage them to buy fishing licenses.

#### ***Reasons to Go Fishing***

Respondents were asked to select the top three reasons they fish. By far, the primary reason for fishing is “to spend time outdoors,” selected by over two-thirds of anglers as one of their top reasons. No other reason was selected by at least half of the respondents (Table 4). The next three ranked reasons were selected by between 45% and 50% of anglers and included, in order:

- “I fish to get away from the stresses of everyday life.”
- “I fish for the excitement of the catch.”
- “I fish to spend time with family.”

**Table 4. Please pick the top three reasons why you fish:**

	Responses	Percent <sup>a</sup>
I fish to spend time outdoors	2,019	67.8%
I fish to get away from the stresses of everyday life	1,471	49.4%
I fish for the excitement of the catch	1,383	46.4%
I fish to spend time with family	1,337	44.9%
I fish to spend time with friends	899	30.2%
I fish to provide food for the table	518	17.4%
I fish to create memories	384	12.9%
I fish because the fishing is getting better and better	44	1.5%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.

Spending time outdoors was the top reason to go fishing for all types and categories of anglers, but there are some interesting differences in the types of anglers who selected other reasons to go fishing. These differences are detailed in Tables 5 through 8. There are no clear differences among anglers in their top reason to fish. Anglers of all ages, incomes, places and gender list “spending time outdoors” at equal rates. However, the data does suggest that urban residents might be the most likely to cite this reason compared to suburban and rural residents, but the differences are not statistically significant (Table 8). Other key findings include:

- ***Reasons to fish by age of angler (Table 5)***
  - Adults in the “family” ages of 25 to 44 years old are the most likely to cite “spending time with family” as one of their top reasons.
  - “The excitement of the catch” is more important to the youngest anglers (under 25 years of age) compared to those age 25 to 44.
- ***Reasons to fish by household income of angler (Table 6)***
  - “Spending time with family” and “spending time with friends” is significantly more important to anglers in higher income households.
  - “I fish to provide food for the table” was selected by lower income anglers almost three times more often than by higher income anglers.
- ***Reasons to fish by gender of angler (Table 7)***
  - Women are more likely than men to fish to “spend time with family.”
  - Men are more likely than women to fish to “spend time with friends.”
- ***Reasons to fish by urban or rural character of angler’s place of residence (Table 8)***
  - Urban residents are more likely to fish to “get away from the stresses of everyday life.”
  - Rural anglers are more likely than suburban or urban anglers to fish as a source of food.

**Table 5. Top Reasons to Fish by Age Category**

	Age			
	Under 25	25 to 44	45 to 64	65 and older
	<u>n=170</u>	<u>n=1139</u>	<u>n=1413</u>	<u>n=216</u>
I fish to spend time with family	<b>46.5%</b>	<b>49.5%</b>	<b>41.6%</b>	<b>37.2%</b>
I fish to spend time with friends	30.7%	30.6%	29.5%	31.5%
I fish for the excitement of the catch	<b>55.3%</b>	<b>43.3%</b>	47.7%	49.2%
I fish to spend time outdoors	69.2%	68.3%	66.7%	72.8%
I fish to provide food for the table	13.7%	17.6%	18.0%	15.1%
I fish to create memories	10.5%	14.5%	11.1%	15.2%
I fish to get away from the stresses of everyday life	47.5%	48.0%	52.0%	43.9%
I fish because the fishing is getting better and better	1.3%	1.2%	2.0%	.3%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

**Table 6. Top Reasons to Fish by Household Income Category**

	Income		
	Less than \$30,000	\$30,000 to \$75,000	More than \$75,000
	<u>n=295</u>	<u>n=1204</u>	<u>n=1161</u>
I fish to spend time with family	<b>34.7%</b>	<b>42.9%</b>	<b>47.9%</b>
I fish to spend time with friends	<b>24.9%</b>	29.4%	<b>33.2%</b>
I fish for the excitement of the catch	49.1%	<b>50.0%</b>	<b>43.5%</b>
I fish to spend time outdoors	72.1%	66.6%	67.7%
I fish to provide food for the table	<b>29.4%</b>	<b>20.2%</b>	<b>11.9%</b>
I fish to create memories	14.6%	13.2%	11.9%
I fish to get away from the stresses of everyday life	48.1%	50.0%	50.6%
I fish because the fishing is getting better and better	.8%	<b>2.3%</b>	<b>1.0%</b>

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

**Table 7. Top Reasons to Fish by Gender**

	Gender	
	Male	Female
	<u>n=2310</u>	<u>n=535</u>
I fish to spend time with family	<b>43.9%</b>	<b>50.1%</b>
I fish to spend time with friends	<b>32.1%</b>	<b>22.6%</b>
I fish for the excitement of the catch	45.6%	48.9%
I fish to spend time outdoors	67.8%	67.2%
I fish to provide food for the table	17.2%	19.8%
I fish to create memories	12.7%	13.6%
I fish to get away from the stresses of everyday life	49.6%	46.5%
I fish because the fishing is getting better and better	1.6%	1.0%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

**Table 8. Top Reasons to Fish by Urbanization Category of Angler's Residence**

	Urbanization		
	Urban	Suburban	Rural
	<i>n=493</i>	<i>n=1351</i>	<i>n=1132</i>
I fish to spend time with family	43.9%	44.8%	45.4%
I fish to spend time with friends	32.2%	31.6%	27.6%
I fish for the excitement of the catch	50.8%	45.3%	45.9%
I fish to spend time outdoors	71.2%	68.2%	65.8%
I fish to provide food for the table	<b>12.5%</b>	<b>16.2%</b>	<b>20.9%</b>
I fish to create memories	11.9%	12.9%	13.4%
I fish to get away from the stresses of everyday life	<b>53.7%</b>	50.2%	<b>46.6%</b>
I fish because the fishing is getting better and better	1.4%	1.2%	1.8%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

***Motivations to Buy Fishing Licenses***

Surveyed anglers were asked to select the top three factors that motivate them to buy fishing licenses (besides the obvious legal requirements). More than one-half of the respondents indicated that they need no motivation – they would “buy a license no matter what” (Table 9). Among anglers who might need some motivation, the standout factor was knowing that “100% of my money went to conservation and to ensure fishing opportunities,” selected by nearly 45% of anglers. No other factor was selected by more than 21% of anglers.

**Table 9. Besides the legal requirements, what else would help motivate you to buy a fishing license next year? Please choose up to three statements that best describe your possible motivations:**

	Responses	Percent
I do not need motivation; I will buy a license no matter what	1,427	54.9%
I would buy a license if I knew 100 of my money went to conservation and to ensure fishing opportunities	1,168	44.9%
I would buy a license if I knew fishing was better than normal	541	20.8%
I would buy a license if fishing was more affordable	467	18.0%
I would buy a license if I could receive expert tips on great fishing locations	399	15.3%
I would buy a license if it gave me discounts on fishing tackle or entered me into sweepstakes	371	14.3%
I would buy a license if it was more convenient such as online sales	294	11.3%
I would buy a license if I could receive expert tips on how to catch more fish	285	11.0%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.

There are no clear patterns to distinguish anglers who would “buy a license no matter what,” but for certain categories they seem to be older, higher income, and live in rural communities. For the other motivating factors, key findings include:

- ***Motivations to buy a license by age of angler (Table 10)***
  - Except for the very youngest group (under 25), younger anglers are more receptive to “discounts on fishing tackle or entered me into sweepstakes” as a motivating factor to buy a license.
- ***Motivations to buy a license by household income of angler (Table 11)***
  - Anglers in lower income households would be more likely than others to buy a license if fishing licenses were more affordable and they had a better chance of catching fish (“fishing was better than normal” and “receive expert tips on how to catch more fish”).
  - Higher income anglers are more motivated by convenience in buying a license (e.g. online sales) and knowing where to fish.
- ***Motivations to buy a license by gender (Table 12)***
  - Men would be more likely than women to buy a license if they “knew 100% of my money went to conservation and to ensure fishing opportunities.”
  - Men would be more likely than women to buy a license if they knew that “fishing was better than normal.”
- ***Motivations to buy a license by urban or rural character of angler’s place of residence (Table 13)***
  - There are no clear patterns relating to the urban or rural character of the angler’s place of residence, but differences include:
    - Urban anglers might be more persuaded than suburban anglers to buy a license if they “knew 100% of my money went to conservation and to ensure fishing opportunities” and convenience in buying a license (e.g. online sales).
    - Suburban anglers might be more persuaded than rural anglers if they could receive expert tips on great fishing locations and how to catch more fish.

**Table 10. Top Motivating Factors to Buy a Fishing License by Age Category**

	Age			
	Under 25	25 to 44	45 to 64	65 and older
	<u>n=147</u>	<u>n=1014</u>	<u>n=1256</u>	<u>n=153</u>
I would buy a license if it gave me discounts on fishing tackle or entered me into sweepstakes	14.2%	<b>17.2%</b>	<b>12.6%</b>	<b>10.4%</b>
I would buy a license if I could receive expert tips on great fishing locations	15.8%	14.8%	15.8%	15.9%
I would buy a license if I could receive expert tips on how to catch more fish	13.1%	9.3%	12.5%	9.5%
I would buy a license if I knew fishing was better than normal	18.5%	19.9%	21.3%	22.4%
I would buy a license if I knew 100 of my money went to conservation and to ensure fishing opportunities	49.1%	46.7%	43.2%	46.3%
I would buy a license if it was more convenient such as online sales	12.8%	12.3%	10.7%	7.6%
I would buy a license if fishing was more affordable	17.2%	18.2%	18.5%	12.2%
I do not need motivation I will buy a license no matter what	52.3%	<b>52.3%</b>	55.9%	<b>64.8%</b>

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

**Table 11. Top Motivating Factors to Buy a Fishing License by Household Income**

	Income		
	Less than \$30,000	\$30,000 to \$75,000	More than \$75,000
	<u>n=259</u>	<u>n=1083</u>	<u>n=1073</u>
I would buy a license if it gave me discounts on fishing tackle or entered me into sweepstakes	14.3%	15.9%	12.6%
I would buy a license if I could receive expert tips on great fishing locations	14.6%	<b>13.5%</b>	<b>17.3%</b>
I would buy a license if I could receive expert tips on how to catch more fish	<b>16.4%</b>	<b>8.7%</b>	<b>11.9%</b>
I would buy a license if I knew fishing was better than normal	<b>26.0%</b>	<b>19.3%</b>	21.4%
I would buy a license if I knew 100 of my money went to conservation and to ensure fishing opportunities	47.7%	44.9%	44.0%
I would buy a license if it was more convenient such as online sales	9.5%	<b>9.3%</b>	<b>13.4%</b>
I would buy a license if fishing was more affordable	<b>29.0%</b>	<b>20.7%</b>	<b>11.6%</b>
I do not need motivation I will buy a license no matter what	<b>43.8%</b>	<b>56.2%</b>	<b>57.2%</b>

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

**Table 12. Top Motivating Factors to Buy a Fishing License by Gender**

	Gender	
	Male	Female
	<u>n=2023</u>	<u>n=457</u>
I would buy a license if it gave me discounts on fishing tackle or entered me into sweepstakes	14.1%	14.3%
I would buy a license if I could receive expert tips on great fishing locations	15.0%	16.4%
I would buy a license if I could receive expert tips on how to catch more fish	11.4%	9.2%
I would buy a license if I knew fishing was better than normal	<b>21.6%</b>	<b>16.4%</b>
I would buy a license if I knew 100 of my money went to conservation and to ensure fishing opportunities	<b>45.5%</b>	<b>39.5%</b>
I would buy a license if it was more convenient such as online sales	11.4%	10.2%
I would buy a license if fishing was more affordable	18.0%	16.8%
I do not need motivation I will buy a license no matter what	55.2%	57.2%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

**Table 13. Top Motivating Factors to Buy a Fishing License by Urbanization of Angler's Residence**

	Urbanization		
	Urban	Suburban	Rural
	<u>n=434</u>	<u>n=1195</u>	<u>n=969</u>
I would buy a license if it gave me discounts on fishing tackle or entered me into sweepstakes	16.8%	13.8%	13.8%
I would buy a license if I could receive expert tips on great fishing locations	16.2%	<b>17.1%</b>	<b>12.7%</b>
I would buy a license if I could receive expert tips on how to catch more fish	10.2%	<b>13.6%</b>	<b>8.1%</b>
I would buy a license if I knew fishing was better than normal	19.6%	22.8%	18.9%
I would buy a license if I knew 100 of my money went to conservation and to ensure fishing opportunities	<b>49.1%</b>	<b>42.3%</b>	46.2%
I would buy a license if it was more convenient such as online sales	<b>14.8%</b>	<b>10.5%</b>	10.6%
I would buy a license if fishing was more affordable	17.1%	18.4%	17.7%
I do not need motivation I will buy a license no matter what	54.4%	<b>52.3%</b>	<b>58.1%</b>

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

***Factors that Might Encourage Anglers to Spend More Time Fishing***

Lack of time is often cited as one of the reasons people might not go fishing, or not fish as often as they might prefer. The survey asked anglers to select the three things that might encourage them to spend more time fishing. The most frequently selected response relates to reducing the amount of time needed to get to a fishing location. Overall, slightly more than one-half of respondents said they might fish more if they “knew places to fish close to home within 30 to 60 minutes.” The three next most important factors were selected by roughly one-third of the respondents, and included having someone to fish with (“If I had someone to go with such as a friend or relative” and “If my spouse partner was interested in going”). The other top factor was knowing “better ways to catch a fish so I would have more success.”

**Table 14. People often report they do not have time to fish. Please pick the top three reasons that would help encourage you to spend more time fishing. / would fish more if...**

	Responses	Percent
If I knew places to fish close to home within 30 to 60 minutes	1,254	50.5%
If I had someone to go with such as a friend or relative	823	33.2%
If I knew better ways to catch a fish so I would have more success	803	32.4%
If my spouse partner was interested in going	780	31.4%
If I had a boat or somewhere to rent a boat for a reasonable cost	668	26.9%
If I knew the best places to fish in my state no matter the distance from home	653	26.3%
If my children were interested in going	507	20.4%
If I knew enough about fishing techniques and equipment to feel more comfortable going	376	15.1%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.

For the top reason that would encourage anglers to spend more time fishing, there are not clear demographic trends. However, knowing places to fish that are close to home is clearly a more important issue for urban anglers than for people in rural places. For other reasons to spend more time fishing, key findings include:

- ***Spending more time fishing by age of angler (Table 15)***
  - Age does not play a statistically detectable difference for most reasons to fish more, but the data suggest that:
    - Having children who were interested in fishing is more important for anglers age 25 to 44 than for any other age group.
    - Anglers age 65 and older are more likely than other age groups to fish more if they had a friend or relative to go fishing with.

- Younger anglers would fish more if they knew better ways to be more successful (although not statistically significant).
- **Spending more time fishing by household income of angler (Table 16)**
  - Compared to anglers in lower income households, higher income anglers would spend more time fishing if they “knew the best places to fish in my state no matter the distance from home.”
  - Having family members (children or a spouse) interested in going fishing is a more important reason to spend more time fishing for higher income anglers than for lower income anglers.
  - For lower income anglers, having a friend or relative to take fishing would encourage them to fish more.
  - For lower income anglers, owning or having access to a boat might encourage them to fish more.
- **Spending more time fishing by gender of angler (Table 17)**
  - More men than women would be encouraged to fish more if they knew the best places in their state to fish.
  - More women than men indicated that they might fish more if they “knew enough about fishing techniques and equipment to feel more comfortable going.”
- **Spending more time fishing by urban or rural character of angler’s place of residence (Table 18)**
  - For urban anglers, knowing where to go fishing and having access to a boat are more important considerations to fish more than for rural anglers.
  - Compared to their urban counterparts, having family members interested in going fishing is a more important consideration for rural anglers to spend more time fishing.

**Table 15. Top Reasons to Spend More Time Fishing by Age Category**

	Age			
	Under 25	25 to 44	45 to 64	65 and older
	<i>n</i> =127	<i>n</i> =931	<i>n</i> =1210	<i>n</i> =185
If I knew places to fish close to home within 30 to 60 minutes	41.4%	52.3%	50.1%	50.4%
If I knew the best places to fish in my state no matter the distance from home	32.0%	25.7%	26.6%	24.1%
If my children were interested in going	21.4%	<b>23.2%</b>	<b>17.9%</b>	19.3%
If my spouse/partner was interested in going	33.2%	32.0%	31.5%	28.3%
If I had someone to go with such as a friend or relative	34.0%	<b>29.8%</b>	34.4%	<b>41.5%</b>
If I knew better ways to catch a fish so I would have more success	42.2%	33.3%	30.8%	30.6%
If I had a boat or somewhere to rent a boat for a reasonable cost	19.8%	28.9%	27.1%	21.0%
If I knew enough about fishing techniques and equipment to feel more comfortable going	23.1%	14.3%	14.8%	17.7%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice. Bold numbers indicate values within a row that are statistically different at .05 level.

**Table 16. Top Reasons to Spend More Time Fishing by Household Income Category**

	Income		
	Less than \$30,000	\$30,000 to \$75,000	More than \$75,000
	<u>n=263</u>	<u>n=1045</u>	<u>n=999</u>
If I knew places to fish close to home within 30 to 60 minutes	56.3%	48.3%	51.1%
If I knew the best places to fish in my state no matter the distance from home	<b>21.5%</b>	25.4%	<b>29.7%</b>
If my children were interested in going	<b>9.3%</b>	<b>20.9%</b>	<b>23.3%</b>
If my spouse/partner was interested in going	<b>18.4%</b>	<b>34.3%</b>	<b>32.7%</b>
If I had someone to go with such as a friend or relative	<b>39.4%</b>	34.8%	<b>30.8%</b>
If I knew better ways to catch a fish so I would have more success	38.8%	31.2%	31.9%
If I had a boat or somewhere to rent a boat for a reasonable cost	<b>33.9%</b>	26.8%	<b>25.2%</b>
If I knew enough about fishing techniques and equipment to feel more comfortable going	17.5%	14.6%	14.1%
<sup>a</sup> Column does not sum to 100% because respondents could make more than one choice. Bold numbers indicate values within a row that are statistically different at .05 level.			

**Table 17. Top Reasons to Spend More Time Fishing by Gender**

	Gender	
	Male	Female
	<u>n=1952</u>	<u>n=417</u>
If I knew places to fish close to home within 30 to 60 minutes	50.4%	49.4%
If I knew the best places to fish in my state no matter the distance from home	<b>26.7%</b>	<b>22.0%</b>
If my children were interested in going	19.8%	23.2%
If my spouse/partner was interested in going	32.5%	28.9%
If I had someone to go with such as a friend or relative	33.9%	31.0%
If I knew better ways to catch a fish so I would have more success	32.0%	35.5%
If I had a boat or somewhere to rent a boat for a reasonable cost	27.6%	23.2%
If I knew enough about fishing techniques and equipment to feel more comfortable going	<b>14.5%</b>	<b>18.6%</b>

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice. Bold numbers indicate values within a row that are statistically different at .05 level.

**Table 18. Top Reasons to Spend More Time Fishing by Urbanization of Angler’s Residence**

	Urbanization		
	Urban	Suburban	Rural
	<i>n=412</i>	<i>n=1144</i>	<i>n=923</i>
If I knew places to fish close to home within 30 to 60 minutes	<b>53.7%</b>	<b>52.4%</b>	<b>46.9%</b>
If I knew the best places to fish in my state no matter the distance from home	<b>31.4%</b>	<b>27.7%</b>	<b>22.2%</b>
If my children were interested in going	<b>16.4%</b>	19.9%	<b>22.9%</b>
If my spouse/partner was interested in going	29.0%	<b>29.6%</b>	<b>34.8%</b>
If I had someone to go with such as a friend or relative	31.8%	32.7%	34.3%
If I knew better ways to catch a fish so I would have more success	32.4%	32.3%	32.4%
If I had a boat or somewhere to rent a boat for a reasonable cost	<b>31.6%</b>	26.8%	<b>24.9%</b>
If I knew enough about fishing techniques and equipment to feel more comfortable going	13.9%	14.9%	16.0%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

***Use of Incentives to Promote Increased Purchases of Fishing Licenses***

State fish and wildlife agencies and businesses that sell fishing equipment are looking for ways to increase their numbers of customers. A commonly used approach is to offer incentives such as rebates, free magazines or prize drawings to encourage people to buy fishing licenses. Anglers in the survey were presented a list of potential incentives and asked to select up to three that would most encourage them to buy fishing licenses. The most frequently selected incentive was a free subscription to a fish and wildlife conservation magazine produced by a state fish and wildlife agency. That incentive was chosen by almost 56% of the respondents (Table 19). The next most frequently chosen incentives were three items that were evenly selected by 40% of the anglers:

- “A \$10 off coupon to a major fishing tackle retailer.”
- “A drawing for a free family weekend fishing vacation.”
- “A free brochure describing where to fish in your state and how to fish in your state.”

Less than one quarter of the respondents were interested in receiving a rebate from fishing tackle companies, such as “a \$10 rebate for a fishing license if you have purchased some of their fishing tackle.” The favored incentive – a free magazine subscription – is equally preferred by nearly all types and categories of anglers. The only real differences are higher preferences among men and urban anglers.

**Table 19. Fishing companies and state fish and wildlife agencies are considering offering incentives to encourage people to buy fishing licenses. Please select up to three incentives that might help encourage you to buy a fishing license next year:**

	Responses	Percent
The state agency would give you a free subscription to their fish and wildlife conservation magazine	1,503	55.9%
You would receive a \$10 off coupon to a major fishing tackle retailer	1,076	40.0%
You would be automatically entered into a drawing for a free family weekend fishing vacation	1,074	39.9%
You would receive a free brochure describing where to fish in your state and how to fish in your state	1,068	39.7%
You would be entered into a drawing for one of ten prizes worth \$500 each in fishing tackle	927	34.4%
A fishing tackle company would send you a \$10 rebate for your fishing license if you have purchased some of their fishing tackle	636	23.7%
You would receive a fishing-related gift valued up to \$5	302	11.2%
You would receive a free ticket to a minor league professional baseball game	164	6.1%

<sup>a</sup> Column does not sum to 100% because respondents could make more than one choice.

Except for statistically significant differences in preferences between men and women, there are few discernable patterns in preferences across other demographic characteristics for most of the other incentives explored in the survey. Where significant differences exist, they tend to be for discrete groups and do not lend themselves to general characterizations. The few highlights include:

- ***Preferred incentives by age of angler (Table 20)***
  - Anglers age 65 and older are less interested than anglers in younger age groups in “a drawing for one of ten prizes worth \$500 each in fishing tackle,” or in “a \$10 off coupon to a major fishing tackle retailer.”
  - A free brochure “describing where to fish in your state and how to fish in your state” is more preferred by older anglers.
- ***Preferred incentives by household income of angler (Table 21)***

There is no discernible pattern in preference for the various incentives across levels of income.
- ***Preferred incentives by gender (Table 22)***
  - Women have a higher preference than men for:
    - “A drawing for a free family weekend fishing vacation.”
    - “A drawing for one of ten prizes worth \$500 each in fishing tackle.”
  - Men have a higher preference than women for:
    - “A free subscription to a fish and wildlife conservation magazine.”
    - “A free brochure describing where to fish in your state and how to fish in your state.”

- **Preferred incentives by urban or rural character of angler’s place of residence (Table 23)**
- Rural tend to be more attracted to drawings for prizes (“a drawing for a free family weekend fishing vacation” and “a drawing for one of ten prizes worth \$500 each in fishing tackle”).
  - Urban anglers seem to be more interested in information (“a free brochure describing where to fish in your state and how to fish in your state” and “a free subscription to their fish and wildlife conservation magazine”), although the latter relationship is not statistically significant.

**Table 20. Preferred Incentives to Buy a Fishing License by Age Category**

	Age			
	Under 25	25 to 44	45 to 64	65 and older
	<u>n=153</u>	<u>n=1027</u>	<u>n=1287</u>	<u>n=192</u>
A fishing tackle company would send you a \$10 rebate for your fishing license if you have purchased some of their fishing tackle	28.8%	22.9%	24.5%	17.9%
The state agency would give you a free subscription to their fish and wildlife conservation magazine	54.1%	55.8%	57.5%	51.7%
You would receive a fishing-related gift valued up to \$5	12.8%	<b>13.1%</b>	<b>9.4%</b>	12.7%
You would be entered into a drawing for one of ten prizes worth \$500 each in fishing tackle	<b>38.5%</b>	<b>34.9%</b>	<b>35.3%</b>	<b>23.0%</b>
You would receive a free ticket to a minor league professional baseball game	7.9%	6.8%	5.1%	7.0%
You would receive a \$10 off coupon to a major fishing tackle retailer	42.3%	<b>43.3%</b>	38.3%	<b>30.3%</b>
You would be automatically entered into a drawing for a free family weekend fishing vacation	38.2%	39.1%	41.3%	36.6%
You would receive a free brochure describing where to fish in your state and how to fish in your state	38.5%	<b>36.0%</b>	<b>41.7%</b>	<b>49.0%</b>

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

**Table 21. Preferred Incentives to Buy a Fishing License by Household Income**

	Income		
	Less than \$30,000	\$30,000 to \$75,000	More than \$75,000
	<u>n=278</u>	<u>n=1184</u>	<u>n=1133</u>
A fishing tackle company would send you a \$10 rebate for your fishing license if you have purchased some of their fishing tackle	21.9%	24.1%	22.9%
The state agency would give you a free subscription to their fish and wildlife conservation magazine	53.0%	56.4%	56.1%
You would receive a fishing-related gift valued up to \$5	12.9%	11.7%	10.1%
You would be entered into a drawing for one of ten prizes worth \$500 each in fishing tackle	31.0%	36.6%	32.8%
You would receive a free ticket to a minor league professional baseball game	5.4%	6.2%	6.2%
You would receive a \$10 off coupon to a major fishing tackle retailer	34.6%	41.9%	39.9%
You would be automatically entered into a drawing for a free family weekend fishing vacation	41.2%	41.6%	38.2%
You would receive a free brochure describing where to fish in your state and how to fish in your state	39.2%	<b>35.2%</b>	<b>44.1%</b>

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice. Bold numbers indicate values within a row that are statistically different at .05 level.

**Table 22. Preferred Incentives to Buy a Fishing License by Gender**

	Gender	
	Male	Female
	<u>n=2082</u>	<u>n=485</u>
A fishing tackle company would send you a \$10 rebate for your fishing license if you have purchased some of their fishing tackle	23.4%	24.1%
The state agency would give you a free subscription to their fish and wildlife conservation magazine	<b>57.4%</b>	<b>51.2%</b>
You would receive a fishing-related gift valued up to \$5	11.1%	11.9%
You would be entered into a drawing for one of ten prizes worth \$500 each in fishing tackle	<b>33.2%</b>	<b>41.2%</b>
You would receive a free ticket to a minor league professional baseball game	<b>6.3%</b>	<b>3.7%</b>
You would receive a \$10 off coupon to a major fishing tackle retailer	40.2%	38.8%
You would be automatically entered into a drawing for a free family weekend fishing vacation	<b>38.7%</b>	<b>46.7%</b>
You would receive a free brochure describing where to fish in your state and how to fish in your state	<b>40.2%</b>	<b>35.2%</b>

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice. Bold numbers indicate values within a row that are statistically different at .05 level.

**Table 23. Preferred Incentives to Buy a Fishing License by Urbanization of Angler's Residence**

	Urbanization		
	Urban	Suburban	Rural
	<i>n=427</i>	<i>n=1224</i>	<i>n=1037</i>
A fishing tackle company would send you a \$10 rebate for your fishing license if you have purchased some of their fishing tackle	23.7%	23.1%	24.4%
The state agency would give you a free subscription to their fish and wildlife conservation magazine	<b>60.7%</b>	<b>53.1%</b>	57.1%
You would receive a fishing-related gift valued up to \$5	11.5%	10.9%	11.5%
You would be entered into a drawing for one of ten prizes worth \$500 each in fishing tackle	31.9%	33.5%	36.6%
You would receive a free ticket to a minor league professional baseball game	6.8%	7.1%	4.7%
You would receive a \$10 off coupon to a major fishing tackle retailer	43.4%	39.1%	39.7%
You would be automatically entered into a drawing for a free family weekend fishing vacation	<b>32.1%</b>	<b>39.9%</b>	<b>43.2%</b>
You would receive a free brochure describing where to fish in your state and how to fish in your state	41.6%	<b>42.5%</b>	<b>35.5%</b>

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

#### **IV. Media, Messages, and Images: Evidence of Advertising Recall and Preference by Anglers**

The Direct Mail Marketing Program targeting lapsed anglers in 2009 was accompanied by radio advertising in each of the states that participated in the program, as well as national print and online advertising. The campaign utilized a limited and consistent set of images and messages to motivate anglers to buy a fishing license. In the survey, anglers were asked a series of questions to gauge their recollections and reactions to the various advertising media, and to examine their preferences for the imagery and messages that were used in the campaign.

##### ***Advertising Recall and Impressions***

The 2009 program included state-specific direct mail and radio advertising, as well as national print and online advertising. However, the survey asked anglers to recall advertising that promoted fishing in other forms of media as a means of comparing the known media outlets used by the RBFF campaign to others that may or may not have included advertising about going fishing. Among all anglers surveyed, over 80% recalled seeing magazine advertising that encouraged them to go fishing, followed by 52% who recalled advertising on television, and 33% who remembered receiving direct mail that promoted fishing. Only 18% recalled any radio advertising (Table 24).

**Table 24. Did you recall seeing or hearing any ads in 2009 in any of the following media that promoted fishing or encouraged you to go fishing?**

	Responses	Percent
Do you recall seeing any magazine ads in 2009 that promoted fishing or encouraged you to go fishing?	1,618	80.5%
Do you recall seeing any television ads in 2009 that promoted fishing or encouraged you to go fishing?	1,042	51.8%
Do you recall seeing any direct mail sent to your house in 2009 that promoted fishing or encouraged you to go fishing?	667	33.2%
Do you recall seeing any radio ads in 2009 that promoted fishing or encouraged you to go fishing?	360	17.9%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.

Table 25 below examines advertising recall by anglers who were targeted by the RBFF campaigns compared to known control groups who received no direct mail, but had an equal chance of being exposed to the radio advertising. The results suggest that the RBFF campaign did not have a lasting impression, which is not unreasonable when considering that the limited advertising took place in Spring and Summer 2009 and the survey was conducted in December 2009 and January 2010. Nevertheless, more people in the control groups than in the treatment groups recalled hearing radio advertising that promoted fishing, despite both groups having an equal chance of being exposed to the radio advertising. There is no statistically significant difference in the percentages of the treatment and control groups who recalled receiving direct mail advertising that promoted fishing in 2009.

**Table 25. Recall of Advertising in 2009 that Promoted Fishing or Encouraged by Targeted Anglers**

	Control group	Treatment group
	<u><i>n</i>=722</u>	<u><i>n</i>=1286</u>
Do you recall seeing any television ads in 2009 that promoted fishing or encouraged you to go fishing?	53.6%	50.9%
Do you recall hearing any radio ads in 2009 that promoted fishing or encouraged you to go fishing?	<b>20.3%</b>	<b>16.6%</b>
Do you recall seeing any direct mail sent to your house in 2009 that promoted fishing or encouraged you to go fishing?	34.3%	32.6%
Do you recall seeing any magazine ads in 2009 that promoted fishing or encouraged you to go fishing?	82.0%	79.7%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
**Bold numbers indicate values within a row that are statistically different at .05 level.**

The people who did recall seeing or hearing some form of advertising promoting fishing were asked in a subsequent question to indicate if the recalled advertising left a positive, negative or neutral impression (Table 26). High percentages of people had positive impressions from television, radio and direct mail advertising, with the lowest percentage associated with magazine advertising. Interestingly, less than 2% of people had negative impressions of the television, radio and direct mail advertising, while one-third of respondents who recalled seeing magazine advertising were left with a negative impression.

**Table 26. Did the following ads leave a positive, negative or neutral impression with you?**

	<b>Magazine</b> <i>n=1618</i>	<b>Television</b> <i>n=1042</i>	<b>Direct Mail</b> <i>n=667</i>	<b>Radio</b> <i>n=360</i>
Positive	<b>59.4</b>	<b>84.1</b>	<b>70.3</b>	<b>79.8</b>
Negative	<b>33.1</b>	<b>1.1</b>	<b>1.4</b>	<b>1.2</b>
Neutral	<b>7.5</b>	<b>14.9</b>	<b>28.4</b>	<b>19.0</b>
<b>Total responses</b>	100.0	100.0	100.0	100.0

*Bold numbers indicate values within a row that are statistically different at .05 level.*

### ***Messaging to Increase Interest in Fishing***

To provide some guidance for development of the 2010 direct mail program, anglers were asked to identify the messages that would be most likely to increase their interest in fishing. Only one message was selected by more than one-half of the respondents -- “The memories are always bigger than the fish.” Two messages were chosen by 49% and 43%: “Share a pastime that can last a lifetime” and “Parents don’t frame pictures of their kids playing video games,” respectively. Fewer than approximately one-third of the anglers found the remaining four test messages to be compelling (Table 27). The demographic analysis of anglers’ responses to the messages suggests that there are no clear patterns of preference to guide targeting the 2010 campaign to specific audiences. With limited exceptions, the most preferred message overall, “The memories are always bigger than the fish,” was equally preferred by most types and categories of anglers. Except for the youngest anglers (under 25 years of age), that message seems to resonate better with older anglers and anglers who live in more rural communities.

**Table 27. Even if you already plan to fish next year, please help us to understand which messages might increase your interest in fishing in 2010. Please select up to three messages that you think offer the most compelling reasons to fish:**

	Responses	Percent
The memories are always bigger than the fish	1,498	53.9%
Share a pastime that can last a lifetime	1,361	48.9%
Parents don't frame pictures of their kids playing video games	1,193	42.9%
Give yourself the license to relax	961	34.6%
Friends don't let friends miss fishing trips	693	24.9%
The fish bites the lure, and yet you're the one who's hooked	469	16.9%
Fish sure are photogenic	435	15.7%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.

Except for statistically significant differences in preferences between select groupings, there are few discernable patterns in preferences across demographic characteristics for most of the messages explored in the survey. The few highlights include:

- ***Preferred messages by age of angler (Table 28)***
  - Anglers in the “family” age category of 25 to 44 years of age preferred the message “Parents don't frame pictures of their kids playing video games” more than anglers in any other age category.
- ***Preferred messages by household income of angler (Table 29)***
  - Anglers in the highest income households were less likely to prefer the message “The fish bites the lure, and yet you're the one who's hooked” compared to other income categories.
- ***Preferred messages by gender (Table 30)***
  - More men than women prefer the messages:
    - “Share a pastime that can last a lifetime.”
    - “Parents don't frame pictures of their kids playing video games.”
  - Although representing only a small number overall, men were also more likely than women to prefer the message “Fish sure are photogenic.”
- ***Preferred messages by urban or rural character of angler’s place of residence (Table 31)***
  - Suburban anglers were more likely than rural anglers to prefer the messages “Parents don't frame pictures of their kids playing video games” and “Give yourself the license to relax.”

**Table 28. Preferred Messages by Age Category**

	Age			
	Under 25	25 to 44	45 to 64	65 and older
	<i>n</i> =151	<i>N</i> =1059	<i>n</i> =1333	<i>n</i> =201
Fish sure are photogenic	13.0%	16.1%	16.2%	12.2%
The fish bites the lure, and yet you're the one who's hooked	22.5%	<b>14.7%</b>	16.9%	<b>23.7%</b>
Share a pastime that can last a lifetime	48.3%	<b>43.1%</b>	<b>52.8%</b>	<b>54.3%</b>
The memories are always bigger than the fish	54.2%	<b>47.9%</b>	<b>56.9%</b>	<b>62.9%</b>
Parents don't frame pictures of their kids playing video games	<b>43.0%</b>	<b>51.5%</b>	<b>38.7%</b>	<b>27.1%</b>
Give yourself the license to relax	28.7%	33.0%	36.3%	38.9%
Friends don't let friends miss fishing trips	27.6%	23.9%	24.9%	26.6%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
**Bold numbers indicate values within a row that are statistically different at .05 level.**

**Table 29. Preferred Messages by Household Income Category**

	Income		
	Less than \$30,000	\$30,000 to \$75,000	More than \$75,000
	<i>n</i> =283	<i>n</i> =1188	<i>n</i> =1153
Fish sure are photogenic	15.8%	15.3%	16.4%
The fish bites the lure, and yet you're the one who's hooked	<b>21.4%</b>	<b>20.1%</b>	<b>11.9%</b>
Share a pastime that can last a lifetime	44.4%	50.3%	48.2%
The memories are always bigger than the fish	55.1%	51.6%	55.9%
Parents don't frame pictures of their kids playing video games	<b>32.5%</b>	<b>45.0%</b>	<b>43.8%</b>
Give yourself the license to relax	36.3%	35.4%	33.4%
Friends don't let friends miss fishing trips	<b>29.9%</b>	<b>22.6%</b>	26.0%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
**Bold numbers indicate values within a row that are statistically different at .05 level.**

**Table 30. Preferred Messages by Gender**

	Gender	
	Male	Female
	<u>n=2157</u>	<u>n=499</u>
Fish sure are photogenic	<b>16.4%</b>	<b>11.7%</b>
The fish bites the lure, and yet you're the one who's hooked	16.4%	19.0%
Share a pastime that can last a lifetime	<b>49.7%</b>	<b>44.6%</b>
The memories are always bigger than the fish	53.3%	57.3%
Parents don't frame pictures of their kids playing video games	<b>44.2%</b>	<b>38.0%</b>
Give yourself the license to relax	34.7%	34.5%
Friends don't let friends miss fishing trips	24.8%	26.3%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

**Table 31. Preferred Messages by Urbanization of Angler's Residence**

	Urbanization		
	Urban	Suburban	Rural
	<u>n=448</u>	<u>n=1265</u>	<u>n=1064</u>
Fish sure are photogenic	12.2%	16.0%	16.8%
The fish bites the lure, and yet you're the one who's hooked	19.0%	15.5%	17.5%
Share a pastime that can last a lifetime	52.5%	46.2%	50.6%
The memories are always bigger than the fish	<b>47.2%</b>	53.7%	<b>57.0%</b>
Parents don't frame pictures of their kids playing video games	43.3%	<b>45.3%</b>	<b>40.0%</b>
Give yourself the license to relax	34.6%	<b>36.9%</b>	<b>31.8%</b>
Friends don't let friends miss fishing trips	24.9%	24.8%	25.0%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

***Images to Increase Interest in Fishing***

To provide insight into preferences for the 2010 direct mail program, four selected images used in the 2009 direct mail programs were stripped of all messaging and ancillary formatting and presented to survey respondents. In this question, respondents were asked to select only one image as their preferred choice. No single image was preferred by a majority of respondents. The highest preference was for the image titled “Pontoon Family,” selected by 36% of anglers, and only 15% preferred the image titled “Thrill of the Catch” (Table 32).

**Table 32. Please help us understand which *images* - if used as part of an advertising campaign - would better encourage you to go fishing next year.**

	Frequency	Percent
Pontoon Family	826	35.8
Sunrise	653	28.3
Family Fishing	480	20.8
Thrill of the Catch	346	15.0
<b>Total responses</b>	<b>2,305</b>	<b>100.0</b>
Missing	941	
Survey total	3,246	

*Pontoon Family*



*Thrill of the Catch*



*Sunrise*



*Family Fishing*



Based on the demographic analysis, there may be limited opportunities to target specific types and categories of anglers with tailored imagery. The most often selected image “Pontoon Family” was clearly preferred by higher income and rural anglers, while the second most selected image “Sunrise” resonated most with younger anglers in lower income households. Other key highlights include:

- **Preferred images by age category of angler (Table 33)**
  - The youngest anglers preferred the image, “Sunrise” compared to the oldest anglers.
  - The oldest angler had a greater preference for the image, “Family Fishing” compared to the youngest anglers.
- **Preferred images by household income category of angler (Table 34)**
  - Anglers in the highest income households were less likely to prefer the images, “Family Fishing” and “Sunrise” compared to anglers in other income categories.
- **Preferred images by gender (Table 35)**
  - Women are more likely than men to prefer the image, “Sunrise.”
- **Preferred images by urban or rural character of angler’s place of residence (Table 36)**
  - Suburban anglers were more likely than rural anglers to prefer the image, “Thrill of the Catch.”

**Table 33. Image Preferences by Age Category**

	Age			
	Under 25	25 to 44	45 to 64	65 and older
	<i>n</i> =138	<i>n</i> =878	<i>n</i> =1081	<i>n</i> =176
Pontoon Family	33.9%	37.9%	35.5%	29.9%
Thrill of the Catch	14.3%	13.8%	15.1%	20.2%
Sunrise	<b>37.3%</b>	28.0%	28.5%	<b>22.3%</b>
Family Fishing	<b>14.4%</b>	20.3%	20.9%	<b>27.7%</b>
Total	100.0%	100.0%	100.0%	100.0%

*Bold numbers indicate values within a row that are statistically different at .05 level.*

**Table 34. Image Preferences by Household Income Category**

	Income		
	Less than \$30,000	\$30,000 to \$75,000	More than \$75,000
	<i>n</i> =236	<i>n</i> =999	<i>n</i> =957
Pontoon Family	<b>20.4%</b>	<b>35.5%</b>	<b>39.9%</b>
Thrill of the Catch	<b>18.5%</b>	<b>11.8%</b>	<b>17.2%</b>
Sunrise	<b>38.8%</b>	<b>29.8%</b>	<b>25.1%</b>
Family Fishing	22.3%	<b>22.9%</b>	<b>17.8%</b>
Total	100.0%	100.0%	100.0%

*Bold numbers indicate values within a row that are statistically different at .05 level.*

**Table 35. Image Preferences by Gender**

	Gender	
	Male	Female
	<i>n=1780</i>	<i>n=420</i>
Pontoon Family	36.8%	32.5%
Thrill of the Catch	15.2%	13.5%
Sunrise	<b>27.1%</b>	<b>33.4%</b>
Family Fishing	20.8%	20.6%
Total	100.0%	100.0%

*Bold numbers indicate values within a row that are statistically different at .05 level.*

**Table 36. Image Preferences by Urbanization of Angler's Residence**

	Urbanization		
	Urban	Suburban	Rural
	<i>n=376</i>	<i>n=1066</i>	<i>n=861</i>
Pontoon Family	<b>30.7%</b>	<b>34.0%</b>	<b>40.3%</b>
Thrill of the Catch	13.5%	<b>17.7%</b>	<b>12.4%</b>
Sunrise	31.7%	28.1%	27.2%
Family Fishing	24.1%	20.2%	20.2%
Total	100.0%	100.0%	100.0%

*Bold numbers indicate values within a row that are statistically different at .05 level.*

## V. Analysis by Response to the 2009 Lapsed Angler Direct Mail Marketing Program

Email lists for the survey were linked to databases developed for the evaluations of the 2009 Lapsed Angler Direct Mail Marketing Program, to examine anglers' preferences based on their response to the direct mail program. The intent was to examine whether anglers who received direct mail and purchased a license during the approximately 84-day period after they received the first mailing exhibit clear differences in their preferences, compared to anglers who received direct mail but did not buy a license. In the following tables, all responses are from anglers who received a mailing as part of the 2009 Lapsed Angler Direct Mail Marketing Program.

Generally, there is not a lot to differentiate anglers who did and did not respond to the direct mail program.

- All anglers who received mailings in the 2009 program share the same reasons for fishing, regardless of whether they responded to the mailings or not. Equal percentages of people who received mailings and bought or did not buy a license during the direct mail program evaluation periods had the same reasons to fish (Table 37).

- Anglers who bought a license in response to direct mail are more likely to be motivated by “expert tips on how to catch more fish,” while anglers who did not buy a license might have been motivated to buy one if “fishing licenses were more affordable” (Table 38).
- Anglers who responded to the direct mail program are more likely to spend more time fishing if they know “the best places to fish in my state no matter the distance from home,” while anglers who did not buy a license in response to the program might spend more time fishing “if their children were interested in going” (Table 39).
- There is no difference in the preference of specific incentives between anglers who responded to the direct mail program and those who did not, except for, “a fishing-related gift valued up to \$5”. Anglers who did not respond to the direct mailings were more likely to prefer this incentive.
- Anglers who responded to the direct mail program were more likely to recall receiving direct mail promoting fishing in 2009 than anglers who did not respond to the mailing (Table 41).
- Anglers who did not respond to the direct mail program have a higher preference for the message “Parents don't frame pictures of their kids playing video games,” while anglers who did respond to the direct mail were more likely to prefer the message, “Friends don't let friends miss fishing trips” than anglers who did not respond to the direct mail (Table 42).
- Anglers who responded to the direct mail program had a higher preference for the image titled “Sunrise” than anglers who did not respond to direct mail.

**Table 37. Reasons to Fish by Response to 2009 Direct Mail Program**

Reasons to go fishing	Responded to direct mail*	
	No	Yes
	<i>n=1896</i>	<i>n=1082</i>
I fish to spend time with family	45.4%	44.0%
I fish to spend time with friends	29.7%	30.9%
I fish for the excitement of the catch	46.0%	47.2%
I fish to spend time outdoors	68.1%	67.3%
I fish to provide food for the table	17.6%	17.1%
I fish to create memories	12.6%	13.5%
I fish to get away from the stresses of everyday life	49.1%	49.9%
I fish because the fishing is getting better and better	1.3%	1.8%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice. Bold numbers indicate values within a row that are statistically different at .05 level.

\*Includes only anglers who were targeted by the RBFF direct mail marketing program.

**Table 38. Motivations to Buy a License by Response to the 2009 Direct Mail Program**

Motivating factors to buy a fishing license	Responded to direct mail*	
	No	Yes
	<u>n=1629</u>	<u>n=971</u>
I would buy a license if it gave me discounts on fishing tackle or entered me into sweepstakes	13.9%	14.9%
I would buy a license if I could receive expert tips on great fishing locations	15.2%	15.5%
I would buy a license if I could receive expert tips on how to catch more fish	<b>9.3%</b>	<b>13.7%</b>
I would buy a license if I knew fishing was better than normal	21.2%	20.1%
I would buy a license if I knew 100 of my money went to conservation and to ensure fishing opportunities	44.7%	45.3%
I would buy a license if it was more convenient such as online sales	11.8%	10.5%
I would buy a license if fishing was more affordable	<b>19.2%</b>	<b>15.9%</b>
I do not need motivation I will buy a license no matter what	53.8%	56.7%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice. Bold numbers indicate values within a row that are statistically different at .05 level.

\*Includes only anglers who were targeted by the RBFF direct mail marketing program.

**Table 39. Spending More Time Fishing by Response to the 2009 Direct Mail Program**

Reasons to spend more time fishing	Responded to direct mail*	
	No	Yes
	<u>n=1574</u>	<u>n=906</u>
If I knew places to fish close to home within 30 to 60 minutes	49.1%	52.9%
If I knew the best places to fish in my state no matter the distance from home	<b>24.5%</b>	<b>29.5%</b>
If my children were interested in going	<b>22.0%</b>	<b>17.7%</b>
If my spouse partner was interested in going	32.5%	29.7%
If I had someone to go with such as a friend or relative	32.2%	34.8%
If I knew better ways to catch a fish so I would have more success	31.9%	33.2%
If I had a boat or somewhere to rent a boat for a reasonable cost	26.7%	27.2%
If I knew enough about fishing techniques and equipment to feel more comfortable going	14.3%	16.6%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice. Bold numbers indicate values within a row that are statistically different at .05 level.

\*Includes only anglers who were targeted by the RBFF direct mail marketing program.

**Table 40. Preferred Incentives to Buy a Fishing License by Response to the 2009 Direct Mail Program**

Incentives to encourage license purchases	Responded to direct mail*	
	No	Yes
	<u>n=1685</u>	<u>n=1004</u>
A fishing tackle company would send you a \$10 rebate for your fishing license if you have purchased some of their fishing tackle	22.6%	25.4%
The state agency would give you a free subscription to their fish and wildlife conservation magazine	54.8%	57.7%
You would receive a fishing-related gift valued up to \$5	<b>12.4%</b>	<b>9.2%</b>
You would be entered into a drawing for one of ten prizes worth \$500 each in fishing tackle	34.3%	34.6%
You would receive a free ticket to a minor league professional baseball game	5.9%	6.5%
You would receive a \$10 off coupon to a major fishing tackle retailer	39.6%	40.7%
You would be automatically entered into a drawing for a free family weekend fishing vacation	39.6%	40.4%
You would receive a free brochure describing where to fish in your state and how to fish in your state	40.7%	38.0%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

\*Includes only anglers who were targeted by the RBFF direct mail marketing program.

**Table 41. Advertising Recall by Response to the 2009 Direct Mail Program**

Advertising media recall	Responded to direct mail*	
	No	Yes
	<u>n=1246</u>	<u>n=762</u>
Do you recall seeing or hearing and television ads in 2009 that promoted fishing or encouraged you to go fishing?	54.4%	47.6%
Do you recall seeing or hearing and radio ads in 2009 that promoted fishing or encouraged you to go fishing?	17.7%	18.3%
Do you recall seeing or hearing and direct mail sent to your house in 2009 that promoted fishing or encouraged you to go fishing?	<b>30.9%</b>	<b>37.0%</b>
Do you recall seeing or hearing and magazine ads in 2009 that promoted fishing or encouraged you to go fishing?	79.2%	82.7%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.  
 Bold numbers indicate values within a row that are statistically different at .05 level.

\*Includes only anglers who were targeted by the RBFF direct mail marketing program.

**Table 42. Preferred Messages by Response to the 2009 Direct Mail Program**

Advertising message	Responded to direct mail*	
	No	Yes
	<u>n=1749</u>	<u>n=1030</u>
Fish sure are photogenic	15.7%	15.6%
The fish bites the lure, and yet you're the one who's hooked	16.8%	17.0%
Share a pastime that can last a lifetime	49.5%	47.9%
The memories are always bigger than the fish	53.5%	54.6%
Parents don't frame pictures of their kids playing video games	<b>44.6%</b>	<b>40.0%</b>
Give yourself the license to relax	33.4%	36.5%
Friends don't let friends miss fishing trips	<b>22.9%</b>	<b>28.4%</b>

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.

Bold numbers indicate values within a row that are statistically different at .05 level.

\*Includes only anglers who were targeted by the RBFF direct mail marketing program.

**Table 43. Preferred Messages by Response to the 2009 Direct Mail Program**

	Responded to direct mail*	
	No	Yes
	<u>n=1449</u>	<u>n=855</u>
Pontoon Family	36.6%	34.5%
Thrill of the Catch	14.9%	15.3%
Sunrise	<b>26.8%</b>	<b>30.9%</b>
Family Fishing	21.7%	19.4%
Total	100.0%	100.0%

Bold numbers indicate values within a row that are statistically different at .05 level.

\*Includes only anglers who were targeted by the RBFF direct mail marketing program.

## VI. Characteristics of Current versus Lapsed Anglers

In the RBFF direct mail marketing programs, lapsed anglers are classified into one of several tiers based on the frequency and timing of their license purchases over the last three to five years. In the surveyed states, lapsed anglers were defined in the 2009 Lapsed Angler Direct Mail Marketing Program as those who last purchased a license in 2007, lapsed in 2008 and had not purchased a license since. The tiers reflect their purchase patterns for 2004 through 2008. In Iowa and Oregon, anglers were also included who had purchased a license in 2008 and were sent

direct mail in 2009 as part of a retention effort. An analysis of the survey responses on the basis of tiers found no patterns that related to any of the information collected in the survey. The reasons that people fish, their motivations to buy a license, receptiveness to incentives, recall of advertising, or their preferences for advertising messages and images had no clear relationship to their level of fishing activity. The sample included only a small number of anglers who did not lapse in 2008, but the limited evidence suggests that they have no distinctive characteristics.

## **VII. Tapestry Analysis**

Tapestry™ lifestyle segmentation provides a means to characterize anglers based on a number of socio-economic measures, and is widely used by businesses to better understand and tailor their marketing to targeted customers. People's preferences are likely to vary based on income, age, urban/rural lifestyle, where they are in life (single, family, empty-nest, retired, etc.) and more. This type of information is not available from the typical statistics provided by a state's electronic license database. To gain a better understanding of who is more likely to buy or not buy a license, Tapestry lifestyle data were used.

ESRI of Arlington, VA provides the Tapestry data service. Tapestry is built from Census Bureau data and other sources. From the ESRI website: "The Community Tapestry segmentation system provides an accurate, detailed description of America's neighborhoods. U.S. residential areas are divided into 65 segments based on demographic variables such as age, income, home value, occupation, household type, education and other consumer behavior characteristics." Using the ESRI service, the records in the fishing license database were appended with Tapestry data. The appended data allow us to learn more about the lifestyles of people who purchase fishing licenses and gain a better understanding of who does and does not buy fishing licenses in response to marketing efforts. The results allow state agencies and private businesses to become more focused and cost-effective in their marketing, recruitment and communication efforts.

Because all of the email addresses used to solicit participation in the survey were linked to license data from the 2009 direct mail program, street address and Tapestry information was available for each of the respondents. In Table 44, the ten largest Tapestry segments are examined in detail to explore the relationship between lifestyle and the reasons and motivations to fish, and the preferences for advertising messages, imagery and media. Because Tapestry designations are place-based, there is a great deal of variation in the distribution of anglers in each segment across the states. However, the anglers in the same Tapestry segment share similar characteristics, regardless of in which state they reside. By including a range of states from across the country, the survey includes a broad sample of anglers across the range of Tapestry segments.

The 65 different Tapestry segments incorporate a variety of measures and provide a finer level of detail to target specific audiences. This is evident in some of the highlights in Table 44 below. Where the demographic analyses pointed out certain general tendencies by income level or degree of urbanization, the Tapestry segments show that not all anglers that share similar incomes or other characteristics respond the same to specific queries. For example, the

demographic analysis suggested that lower income and rural anglers were most likely to fish as a source of food for the household. Table 44 shows that there are exceptions to that general rule. The Tapestry segments with anglers most likely to fish as a food source are indeed rural (Tapestries 26 and 31), but other rural segments (Tapestries 17, 42, 46) did not respond as highly. The differences between those rural groups are not statistically significant, but likewise the differences between Tapestries 17, 42, and 46 are not statistically different from the more urban Tapestry segments. The same pattern emerges with respect to income. Higher numbered Tapestry segments generally have lower incomes, but the lowest income Tapestry segments are not statistically different from the highest income segments, presumably due to characteristics other than income that comprise those high-numbered Tapestry segments (e.g., older anglers in Tapestry 49; regional location of anglers in Tapestry 42).

Table 44 presents only those issues addressed in the survey where there are statistically significant differences across Tapestry segments. Numbers highlighted in a similar color are not statistically different from each other, but numbers highlighted in yellow are significantly higher than numbers highlighted in green. Numbers without shading are not significantly different from any other number within the same row. Other highlights from Table 44 include:

- While a majority of anglers in the survey indicated that they needed no motivation to buy a license, Southern Satellites (Tapestry 42) stand out above nearly every other group in this regard, suggesting they may not be responsive (i.e. provide lift) to marketing efforts persuading them to buy a license, since over 76% indicate that they would buy anyway.
- Expert tips to catch more fish were found to be more important to urban and higher income anglers. Table 44 confirms this, but singles out Tapestries 06 (Sophisticated Squires) and 13 (In Style) as having a particularly high affinity for that information as a motivation to buy a license. Anglers in rural Tapestry 46 (Rooted Rural) were more likely to prefer “discounts on fishing tackle or entered me into sweepstakes” compared to anglers in Tapestries 07 (Exurbanites) and 31 (Rural Resort Dwellers).
- Anglers in Tapestry 26 (Midland Crowd) would be more likely to spend more time fishing if their children were interested in going, compared to those in Tapestries 13 (In Style) and 42 (Southern Satellites). Owning or having access to a boat might persuade anglers in Tapestries 42 (Southern Satellites) and 12 (Up and Coming Families) to fish more, but it is much less important consideration for Senior Sun Seekers in Tapestry 49 (Senior Sun Seekers).
- Over one-half of all anglers selected “a free subscription to their fish and wildlife conservation magazine” as their most preferred incentive to buy a license. Table 44 shows that this incentive is especially desirable to Southern Satellites (Tapestry 42) anglers. Whether or not that incentive would encourage them to actually buy a license is confounded by the finding that they are the most likely to buy a license regardless of the motivation. Other incentives that appealed to specific Tapestry segments include “a drawing for one of ten prizes worth \$500 each in fishing tackle” that appealed most to anglers in Tapestry 49 (Senior Sun Seekers), and “a drawing for a free family weekend fishing vacation” that appealed most to Southern Satellites (Tapestry 42).
- Anglers in none of the ten largest Tapestry segments showed any differences with respect to their recall of any radio or direct mail advertising in 2009. However, anglers in Tapestry 42 (Southern Satellites) were more likely than Up and Coming Families

(Tapestry 12) to recall seeing television advertising that promoted fishing and Senior Sun Seekers (Tapestry 49) were more likely than anglers in Tapestries 12 (Up and Coming Families) and 46 (Rooted Rural) to recall magazine advertising.

- “Share a pastime that can last a lifetime” was the second most frequently selected advertising message among all anglers, with 49% selecting it as one of their top three choices. That message resonates particularly well with anglers in Tapestries 17 (Green Acres) and 42 (Southern Satellites) with 59% and 60% of anglers in those groups selecting that message, compared to 39% of anglers in Tapestry 07 (Exurbanites).
- “Pontoon Family” was the most selected image across all anglers, although only 36% selected it as their top choice overall. That image stood out for anglers in Tapestry 26 (Midland Crowd) which is made up of middle income married families living in rural towns and villages. Surprisingly, that image garnered the fewest selections from Tapestry 12 (Up and Coming Families). Although that group is also comprised of families, its members have higher incomes and live in more suburban settings. “Family Fishing” appealed most to Southern Satellites (Tapestry 42) and least to Midland Crowd (Tapestry 26).

**Table 44. Highlighted Differences in Reasons and Motivations to Fish and Marketing Preferences by Tapestry Segment**

	TAPESTRY									
	06	07	12	13	17	26	31	42	46	49
	Sophisticated Squires	Exurbanites	Up and Coming Families	In Style	Green Acres	Midland Crowd	Rural Resort Dwellers	Southern Satellites	Rooted Rural	Senior Sun Seekers
<b>Reasons to fish</b>	<i>n=131</i>	<i>n=211</i>	<i>N=190</i>	<i>n=103</i>	<i>n=176</i>	<i>n=250</i>	<i>n=111</i>	<i>n=126</i>	<i>n=118</i>	<i>n=117</i>
I fish to provide food for the table	11.0%	11.8%	16.4%	14.4%	13.4%	27.3%	33.2%	22.8%	18.3%	20.6%
<b>Motivations to buy a license</b>										
I would buy a license if it gave me discounts on fishing tackle or entered me into sweepstakes	17.5%	10.2%	16.0%	16.6%	12.0%	12.0%	7.1%	20.6%	25.7%	13.3%
I would buy a license if I could receive expert tips on how to catch more fish	17.8%	13.9%	10.5%	18.3%	7.3%	5.1%	8.3%	13.4%	3.7%	10.9%
I do not need motivation I will buy a license no matter what	47.3%	51.3%	47.5%	48.3%	57.0%	54.1%	52.5%	76.5%	51.1%	60.8%
<b>Reasons to spend more time fishing</b>										
If my children were interested in going	25.9%	22.4%	25.4%	11.5%	19.1%	35.2%	17.1%	11.7%	29.8%	26.8%
If I had a boat or could rent a boat for a reasonable cost	21.6%	27.8%	33.1%	34.2%	24.9%	18.5%	26.5%	41.1%	26.8%	13.3%
<b>Incentives to buy a fishing license</b>										
The state agency would give you a free subscription to their fish and wildlife conservation magazine	46.5%	51.6%	52.3%	39.8%	57.0%	56.7%	49.2%	73.7%	49.7%	48.3%
You would be entered into a drawing for one of ten prizes worth \$500 each in fishing tackle	34.3%	29.1%	39.0%	22.5%	34.1%	38.8%	47.6%	28.8%	28.4%	52.6%
You would be automatically entered into a drawing for a free family weekend fishing vacation	39.3%	44.2%	33.7%	35.2%	37.6%	46.6%	43.7%	60.7%	43.2%	31.0%
<b>Recall of advertising media messages</b>										
Do you recall seeing or hearing and television ads in 2009 that promoted fishing or encouraged you to go fishing?	55.6%	45.8%	42.2%	47.5%	57.6%	49.5%	56.6%	65.0%	52.1%	58.8%
Do you recall seeing or hearing and magazine ads in 2009 that promoted fishing or encouraged you to go fishing?	76.4%	80.4%	69.1%	81.6%	75.7%	81.9%	81.8%	78.0%	68.0%	93.6%
<b>Preferred advertising messages</b>										
"Share a pastime that can last a lifetime"	56.1%	39.4%	46.5%	42.1%	58.9%	47.2%	49.3%	60.5%	49.9%	41.9%
<b>Preferred advertising imagery</b>										
Pontoon Family	42.6%	31.7%	29.6%	32.5%	46.7%	48.7%	34.2%	33.9%	38.6%	35.2%
Thrill of the Catch	14.9%	16.8%	22.2%	16.2%	11.6%	9.3%	11.9%	2.1%	16.7%	18.8%
Family Fishing	20.7%	26.7%	20.7%	18.2%	18.1%	13.3%	23.9%	37.0%	23.6%	14.9%

<sup>a</sup>Column does not sum to 100% because respondents could make more than one choice.

Bold numbers indicate values within a row that are statistically different at .05 level.

## Appendix A

### 2009-10 Angler Outreach Survey

[STATE AND RBFF LOGO HERE – BOTH LOGOS PLACED ON EMAIL INVITE]

#### **Email invitation message:**

The [State Agency Name] and the Recreational Boating & Fishing Foundation are conducting an angler survey through a partnership created to increase fishing participation. We ask you to please take a few minutes to complete a simple survey regarding your motivations for fishing and the effectiveness of recent fishing marketing efforts. Your participation is anonymous, and no one will contact you as a result of participating in this survey. Your response will be kept fully confidential and will only be seen by our third party research contractor, Southwick Associates. To take the survey, please click [\[HERE\]](#).

*The Recreational Boating & Fishing Foundation was organized by the fishing and boating industry and state fish and wildlife agencies to promote recreational fishing and boating.*

#### **HTML survey introduction message:**

This survey should take about ten minutes. Your response will be kept fully confidential and will only be seen by our third party research contractor, Southwick Associates. If you have any questions or concerns, please contact [Lisa@SouthwickAssociates.com](mailto:Lisa@SouthwickAssociates.com). Thank you!

#### **Survey Questions:**

1. Did you buy a license in 2009?  
 Yes [If yes, go to #2]  
 No [Go to #3]  
 I am not required to buy a license [Go to #2]
  
2. Please select where you fished *most of the time* in 2009:  
 My home state  
 I did not fish in 2009  
 In another state  
 Outside the U.S.  
 Don't recall / other
  
3. In which year did you last buy a fishing license?  
 2009  
 2008  
 2007  
 2006  
 Before 2006  
 I don't recall  
 I have never bought a fishing license

I am not required to buy a license

4. Please pick the top three reasons why you fish:

*[NOTE: Permit the respondent to check at most three choices and rotate choices]*

- I fish to spend time with family
- I fish to spend time with friends
- I fish for the excitement of the catch
- I fish to spend time outdoors
- I fish to provide food for the table
- I fish to create memories
- I fish to get away from the stresses of everyday life
- I fish because the fishing is getting better and better
- Other – please describe

5. Besides the legal requirements, what would help motivate you to buy a fishing license next year? Please choose up to three statements that best describe your possible motivations:

*[NOTE: rotate choices]*

- I would not buy a license under any circumstances – I do not plan to fish
- I do not need to buy a license due to legal exemptions
- I do not need motivation – I will buy a license no matter what
- I would buy a license if it gave me discounts on fishing tackle or entered me into sweepstakes
- I would buy a license if I could receive expert tips on great fishing locations
- I would buy a license if I could receive expert tips on how to catch more fish
- I would buy a license if I knew fishing was better than normal
- I would buy a license if I knew 100% of my money went to conservation and to ensure fishing opportunities
- I would buy a license if it was more convenient, such as online sales
- I would buy a license if fishing was more affordable
- Other – please describe

6. People often report they do not have time to fish. Please pick the top three reasons that would help encourage you to spend more time fishing. *I would fish more if...*

*[Note: rotate choices]*

- I knew places to fish close to home (within 30 to 60 minutes)
- I knew the best places to fish in my state, no matter the distance from home
- my children were interested in going
- my spouse/partner was interested in going
- I had someone to go with, such as a friend or relative

- I knew better ways to catch fish so I would have more success
- I had a boat or somewhere to rent a boat for a reasonable cost
- I knew enough about fishing techniques and equipment to feel more comfortable going
- other - please describe:

7. Even if you already plan to fish next year, please help us understand which messages might increase your interest in fishing in 2010. Please select up to three messages that you think offer the most compelling reasons to fish:

*[Note: rotate choices]*

- "Fish sure are photogenic" (accompanied by a picture of a smiling kid holding a fish he or she just caught)*
- "The fish bites the lure, and yet you're the one who's hooked"*
- "Share a pastime that can last a lifetime"*
- "The memories are always bigger than the fish"*
- "Parents don't frame pictures of their kid playing video games"*
- "Give yourself the license to relax"*
- "Friends don't let friends miss fishing trips"*

8. Please check just one image which - if used as part of an advertising campaign - would best encourage you to go fishing next year.

*Four pictures of fishing scenarios*

9. Did you recall seeing or hearing any ads in 2009 in any of the following media that promoted fishing or encouraged you to go fishing?

- |                                |                              |                             |                                   |
|--------------------------------|------------------------------|-----------------------------|-----------------------------------|
| Television                     | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Not sure |
| Radio                          | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Not sure |
| Direct mail sent to your house | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Not sure |
| Magazines                      | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Not sure |

*[NOTE: When the respondent marks "yes" to any of the above, they will then see the following question:]*

Did the [television, radio, direct mail, magazine] ad leave a positive, negative or neutral impression with you?

- Positive
- Negative
- Neutral

10. Fishing companies and some state fish and wildlife agencies are considering offering incentives to encourage people to buy fishing licenses. Please select up to three incentives that might help encourage you to buy a fishing license next year:

*[Note: rotate choices]*

- A fishing tackle company would send you a \$10 rebate for your fishing license if you have purchased some of their fishing tackle.
- The state agency would give you a free subscription to their fish and wildlife conservation magazine.
- You would receive a fishing-related gift valued up to \$5.
- You would be entered into a drawing for one of ten prizes worth \$500 each in fishing tackle.
- You would receive a free ticket to a minor league professional baseball game.
- You would receive a \$10 off coupon to a major fishing tackle retailer.
- You would be automatically entered into a drawing for a free family weekend fishing vacation.
- You would receive a free brochure describing where to fish in your state and how to fish in your state.

11. Which of the following best describes your ethnicity:

- African American
- Asian or Pacific Islander
- Caucasian/white
- Hispanic or Latino
- Native American
- Other

12. Please indicate your education level:

- 11 years or less
- 12 years
- 1 to 3 years of college
- 4 or more years of college

13. Please indicate your income level:

- under \$10,000
- \$10,001 to \$20,000
- \$20,001 to \$30,000
- \$30,001 to \$40,000
- \$40,001 to \$50,000
- \$50,001 to \$75,000
- \$75,001 to \$100,000
- \$100,001 or above