

Determining Actionable Strategies for Angler R3

Presented at the
**2018 RBFF
State Marketing
Workshop**

December 6, 2018

**Mark Damian Duda,
Responsive Management**



PRELIMINARY

Special Thanks To



Frank Peterson, Jr.



Stephanie Hussey



Dave Chanda



Joanne Martonik

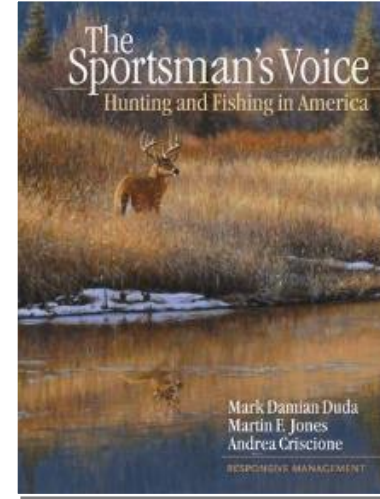


RECREATIONAL
BOATING & FISHING
FOUNDATION

PRELIMINARY

About Responsive Management

- Research firm specializing in natural resource and outdoor recreation issues
- 28 years of continuous survey research projects
- More than 1,000 human dimensions studies
- Almost \$60 million in human dimensions research
- Research in 50 states and 15 countries
- Research conducted for every state fish and wildlife agency and most federal resource agencies
- Research for most NGOs, including RBFF, NSSF, ASA, ATA, Ducks Unlimited, Trout Unlimited, and more
- Research for industry leaders, such as Winchester, Vista Outdoor (Bushnell, Primos, Federal Premium, etc.), Trijicon, Yamaha, and more
- Data collection for the nation's top universities: Colorado State University, Duke University, Penn State University, Rutgers University, Stanford University, University of Southern California, and many more



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Current and Recent Responsive Management Angler Projects:

- ✓ *New York Angler Effort and Expenditures*
- ✓ *Iowa Statewide Angler Survey*
- ✓ *Maine Anglers' Participation in and Opinions on Freshwater Fishing*
- ✓ *Indiana Anglers' Fishing Participation and Their Opinions on Fishing Management Issues*
- ✓ *New Hampshire Licensed Anglers' Participation in and Satisfaction With Fishing and Their Opinions on Fishing Issues*
- ✓ *Arkansas Anglers' Motivations for, Expenditures on, Methods of, and Opinions on Trout Fishing in Arkansas*
- ✓ *Survey of South Carolina Licensed Recreational Marine Anglers*
- ✓ *Trend Study Regarding Arizona Residents' Opinions on the Arizona Game and Fish Department and Outdoor Recreation in Arizona*
- ✓ *Data Collection to Explore Nevada Hunters' and Anglers' Attitudes Toward License Fee Restructuring*
- ✓ *Arizona Anglers' Opinions, Attitudes, and Expenditures in the State*
- ✓ *Trout Anglers' Participation in And Opinions on Trout Fishing in North Carolina*
- ✓ *Mountain Trout Fishing: Economic Impacts on And Contributions to North Carolina's Economy*



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Current and Recent Responsive Management Angler Projects:



- ✓ *North Carolina Landowners' Attitudes Toward Trout Fishing Access*
- ✓ *New Jersey Trout Anglers' Opinions on Stocking and Other Trout Regulations*
- ✓ *Resident Participation in Freshwater and Saltwater Sport Fishing in Georgia*
- ✓ *Washington Angler Survey Report*
- ✓ *Survey of South Carolina Licensed Recreational Marine Anglers*
- ✓ *New Hampshire Licensed Anglers' Participation in and Satisfaction With Fishing*
- ✓ *Data Collection to Explore Nevada Hunters' and Anglers' Attitudes Toward License Fee Restructuring*
- ✓ *Enhancing Fishing Access Through a National Assessment of Recreational Boating Access*
- ✓ *Red Snapper Anglers' Opinions on the Red Snapper Fishery and Fishing Regulations in the Gulf of Mexico*
- ✓ *Understanding First-Time Fishing License Buyers*
- ✓ *Freshwater and Saltwater Fishing Participation Among Alabama Residents*

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The background features a white space on the left and a blue geometric pattern on the right. The blue pattern consists of overlapping, semi-transparent triangles and polygons in various shades of blue, creating a modern, abstract design.

Other Examples of Responsive Management's Angler Research

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**Sport
Fishing and
Boating
Partnership
Council**



Strategic Plan

For the

National Outreach and Communication Program

As required by the

Sportfishing and Boating Safety Act of 1998

Final Report — September 18, 1998

PRELIMINARY



**Bob
Ditton**



**Mark
Damian
Duda**



**Tony
Fedler**

- Call for a national umbrella campaign focusing on taking people fishing
- Call for a focus on marketing to other outdoor recreationists and Hispanics
- The first in-depth look at churn
- The first call for email reminder campaigns

**THE FUTURE OF FISHING IN THE UNITED STATES:
ASSESSMENT OF NEEDS TO INCREASE SPORT
FISHING PARTICIPATION**

PHASE V: FINAL REPORT
RECOMMENDATIONS AND STRATEGIES



INTERNATIONAL ASSOCIATION OF FISH AND WILDLIFE AGENCIES
FEDERAL AID IN SPORT FISH RESTORATION
GRANT AGREEMENT 1448-98210-98-G048



CONDUCTED BY RESPONSIVE MANAGEMENT

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Route:

-
-
-
-



The "Water Works Wonders" ad campaign appeals to those who say they want more time to relax and connect with friends and family.

At first blush, it is an evocative, heart-massaging campaign, its peaceful images and lyrical copy a welcome oasis on cluttered adscapes of noisy product pitches. This is not mere happenstance. The RBFF, which did not respond to interview requests, took up its charge three years ago with an exhaustive battery of research into why people fish and why they don't do so more often. The number

of active anglers decreased from 35.6 million people aged 16 and older, to 35.2 million between 1991 and 1996, according to the Department of the Interior. While not a precipitous decline, it is ominous when compared with a 20 percent growth in the angling population through the 1980s.

In its own series of regional telephone surveys conducted by Responsive Management, a research firm based in Harrisonburg, Virginia, the foundation discovered that 55 percent of past anglers cited time constraints as the reason they had curtailed fishing. Of those, 69 percent cited work obligations as the locus of their time constraints. So at least among those who'd fished before, the point of disconnect almost informs the lure of angling. That is, amid our hectic schedules, we are primed for a much-needed respite, if only we can find the time and impetus.

Further research supported the notion of fishing as disconnection with our vocational lives in favor of reconnection with the private. According to Responsive Management's data and a 1980 U.S. Fish and Wildlife Service study, 55 percent of anglers in 1999 cited relaxation as their reason for fishing, vs. 14 percent in 1980. Thirty-three percent cited

A New Angle

The Recreational Boating and Fishing Foundation aims to reel in more anglers. Will the lure of the simpler pleasures hook them?

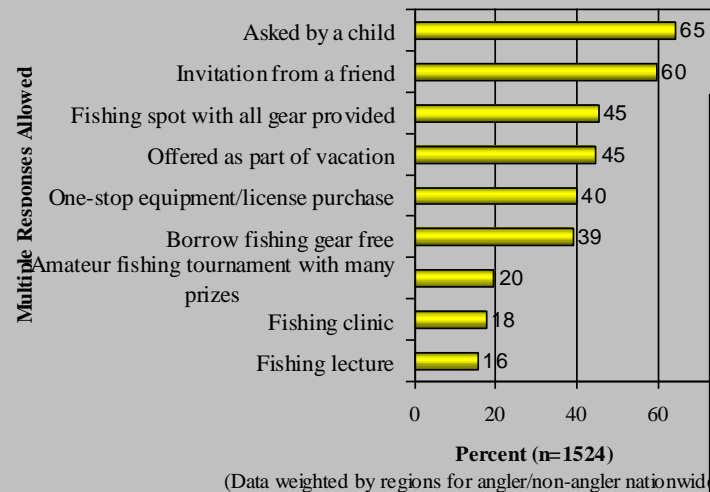
It evokes images of Huck Finn, of Andy and Opie ambling down to the pond, and of stoic Midwestern geezers biding their retirement in a lazily drifting boat. It is one of those sepia-hazy, dew-appointed pastimes of that "simpler America" that fewer and fewer people can remember, of a rural republic vs. a global empire. At very least, it is something your dad used to do.

Fishing seems an anachronism in this one-button Internet-access, multitasking world, where cell phones and laptops enable work's creeping encroachment into leisure hours, and where two kids in every classroom are diagnosed with Attention Deficit Disorder. Who, after all, has time for such lazy, uncomplicated, Zen leisure between 70-hour work-weeks, two careers per household, and children coming of age? How does such a rustic notion strike a chord with a largely urban, techno-centric population

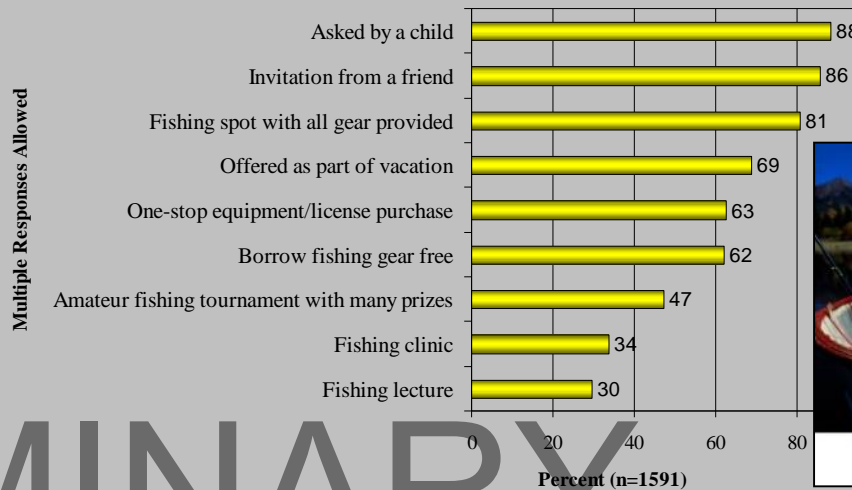
buffeted by dog-eat-dog lifestyles accessorized by the latest, hottest, hippest? And yet, the irony of this setup is that it may provide an arguable, self-sustaining rationale for the pitch of the new ad campaign for the Recreational Boating & Fishing Foundation (RBFF), in spite of the difficult waters the organization is attempting to navigate.

A nonprofit consortium of industry associations and government agencies, the RBFF raised a few eyebrows this spring with its "Water Works Wonders" campaign. Introduced on big-ticket national media, such as CBS's NCAA tournament coverage, the TV component of the campaign offers richly photographed, idyllic images of people of all sizes and colors idling in each other's heartfelt company. Different voices, young and old, bid, "Take me fishing ...and make me feel 16 again," or "...because my wedding will be sooner than you think."

Which of the following situations would encourage you to go fishing or fish more? (NON-ANGLERS)



Which of the following situations would encourage you to go fishing or fish more? (ANGLERS)

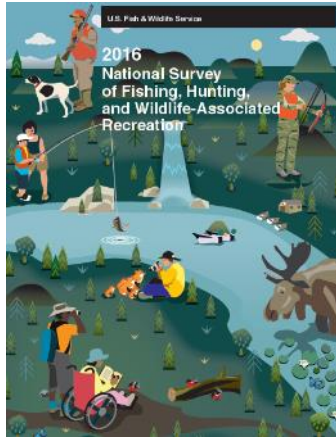


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National Fishing Trends

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National Fishing Trends



2016 National Survey:

- Overall fishing participation increased 8% between 2011 and 2016, from 33.1 million anglers to 35.8 million in 2016



2018 RBFF / Outdoor Foundation Report:

- In 2017, 16.5% of the U.S. population went fishing at least once, up 0.4% since 2016 and the highest participation rate since 2009

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Determining Actionable Strategies for Angler R3



Grant number
F18AP00165



PRELIMINARY

Study Objectives

- Determine how fishing can stay relevant in a changing society
- Determine how changing demographics and new technologies impact the ability of agencies to recruit, retain, and reactivate anglers



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Project Methodology at a Glance

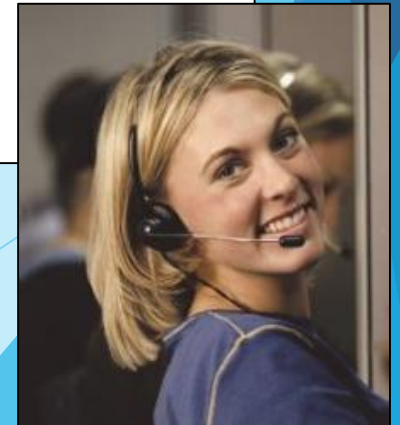
- Scientific telephone survey and supplemental online survey of U.S. residents
- Focus groups with U.S. residents
- Focus groups with R3 professionals
- Comprehensive final report with implications based on data

2018 Multistate Conservation Grant Program
Grant Proposal

Executive Summary

1. **Project Title:** Determining Actionable Strategies for Angler E3
2. **Full Legal Name of Organization:** Recreational Boating and Fishing Foundation (REBF)
3. **Organization Information:**
 - a. Applicant Classification: Nongovernmental organization
 - b. Nongovernmental Organization Classification (if applicable): 501(c)(3)
4. **Lead Applicant's Contact Information:**
 - a. President / CEO
 - b. Frank Peterson
 - c. 500 Montgomery St #300
 - d. Alexandria, VA, 22314
 - e. fpeterson@rbff.org
 - f. 703-778-5157
5. **Name and Affiliation of Co-Investigator(s)/Partner(s) (if applicable):** Dove Chanda and Stephanie Hussey, REBF; Mick Dumas Duda, Responsive Management
6. **Project Length:** 1 year
7. **Funding Source:**

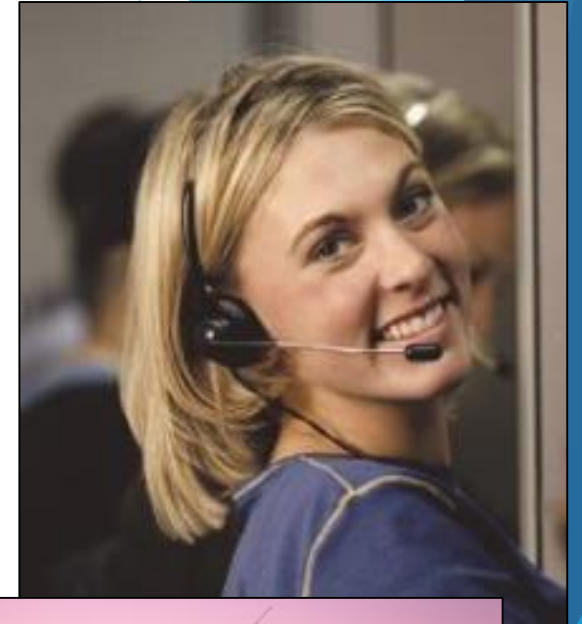
Percent WR:	n/a	Percent SFR:	100%
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8. **State Benefit Requirement:** a. b. c. d.
9. **Primary National Conservation Need (NCN) Addressed:** NCN 9, Outdoor Heritage—Participation, recruitment, retention and recreation in boating, fishing, boating, and conservation-related recreational activities; enhanced relations among state fish and wildlife agencies and the related industries.



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Quantitative Methodology

- **Surveys quantified interest and participation in fishing; barriers and constraints; opinions on various messages and R3 strategies; sources of information on fishing; and more**
- **Scientific telephone survey of U.S. residents**
 - ✓ n=2,800 (700 per AFWA region)
 - ✓ Landlines and wireless phones called in proper proportions
 - ✓ Random sample of residents included various segments of anglers (avid, sporadic, lapsed, ex, and non-anglers)
- **Supplemental online survey**
 - ✓ Conducted specifically to oversample underserved minority populations
 - ✓ n=1,500 (500 African-Americans, 500 Latinos, and 500 Asian-Americans)



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Qualitative Methodology

- **Focus groups will explore survey findings in depth and produce new insights through open-ended discussions**
- **Six focus groups with American adults to be conducted throughout the AFWA regions**
 - ✓ **Chicago: Young adults / millennials (January 28)**
 - ✓ **Houston: Latino families (January 28)**
 - ✓ **Austin: Latino families (January 29)**
 - ✓ **Tampa: Latinos (January 31)**
 - ✓ **Seattle: Active adults (January 31)**
 - ✓ **VA Beach: TBD**
- **Four focus groups with agency R3 specialists**
 - ✓ **To be conducted via conference calls or at regional meetings and conferences during 2019**



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Comprehensive Final Report



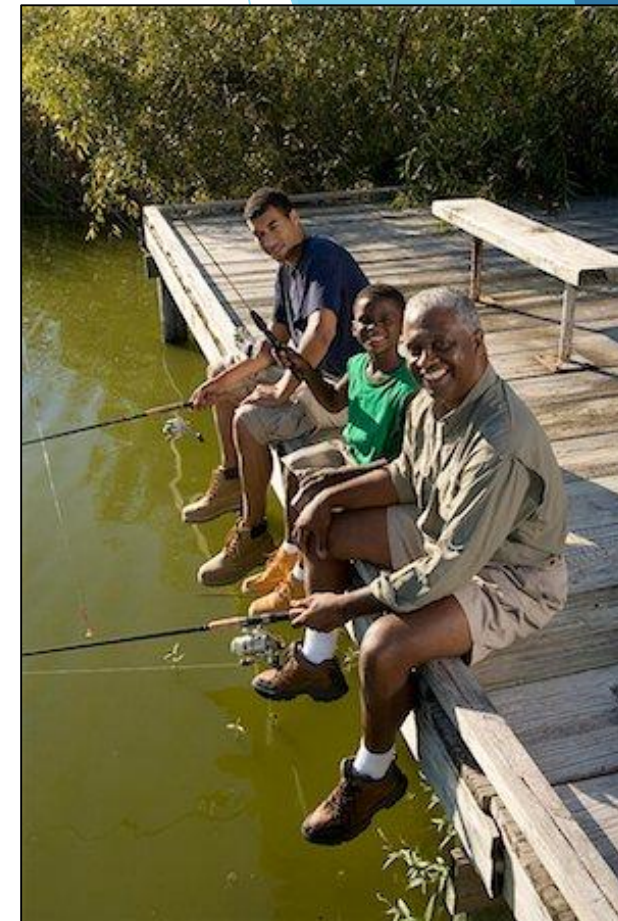
- **Data to result in actionable R3 strategies for agencies and industry groups moving forward**
- **Findings will address national demographic changes and how R3 should consider cultural, social, and resource-based barriers**



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Overview of Survey Topics

- **Participation in Fishing**
- **Fishing as an Adult and as a Child**
- **Years Fished / Current Fishing Status**
- **Interest in Fishing**
- **Fishing Knowledge**
- **Motivations for Fishing and Encouragements for Participation in Fishing**
- **Constraints to Fishing Participation**
- **Fishing License Purchasing**
- **Hearing and Seeing Information About Fishing**
- **Familiarity With and Use of Various Websites, Including the State Fish and Wildlife Agency Site**
- **Outreach and Sources of Information**
- **Purchase of Fishing Equipment, Including Factors in Making Purchasing Decisions**



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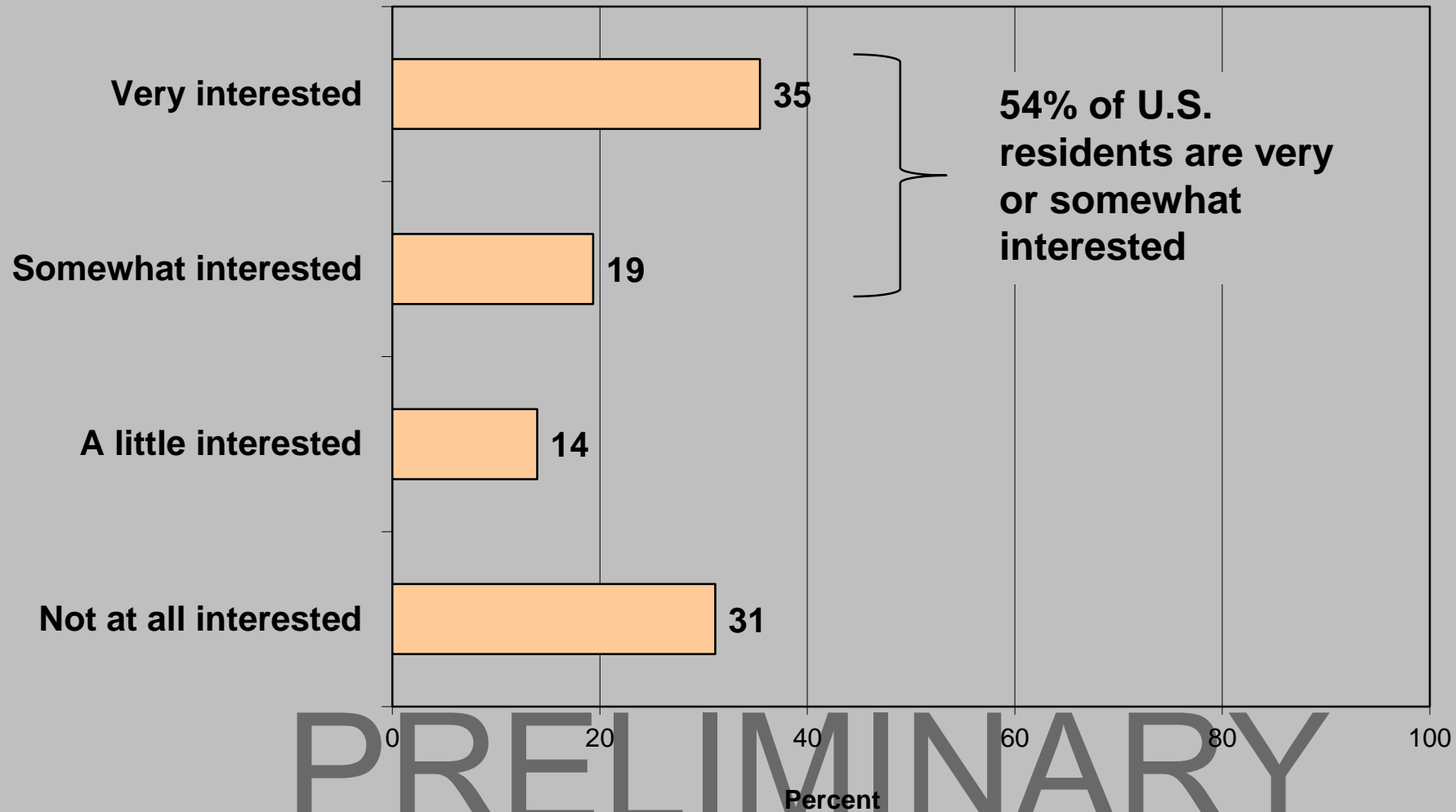
Major Findings

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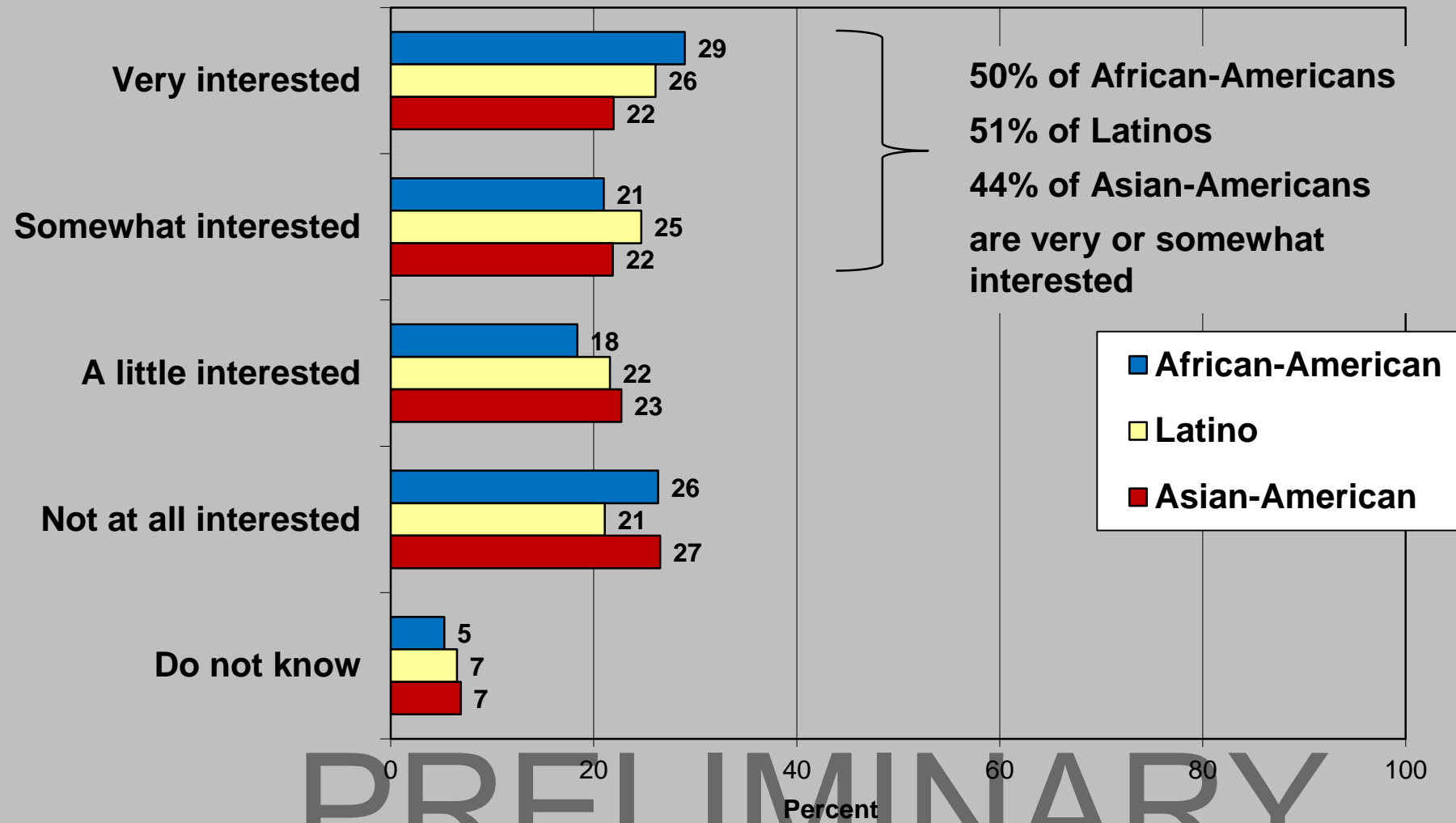
**How interested are Americans
in fishing in the next 5 years?**

PRELIMINARY

Are you very interested, somewhat interested, a little interested, or not at all interested in going recreational fishing in the next 5 years? (U.S. residents)



Are you very interested, somewhat interested, a little interested, or not at all interested in going recreational fishing in the next 5 years?

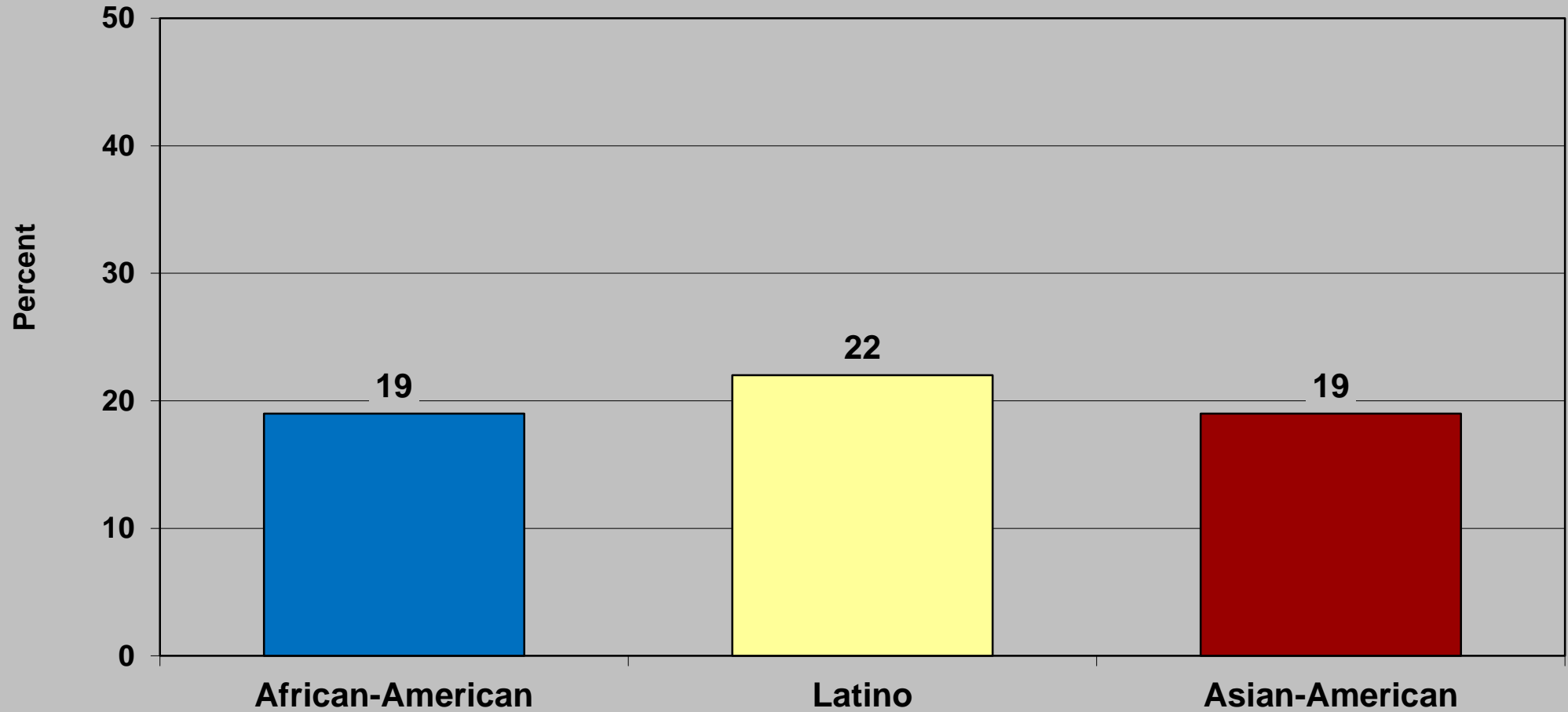


PRELIMINARY

**What percentages of African-Americans,
Latinos, and Asian-Americans have fished
in the past 5 years?**

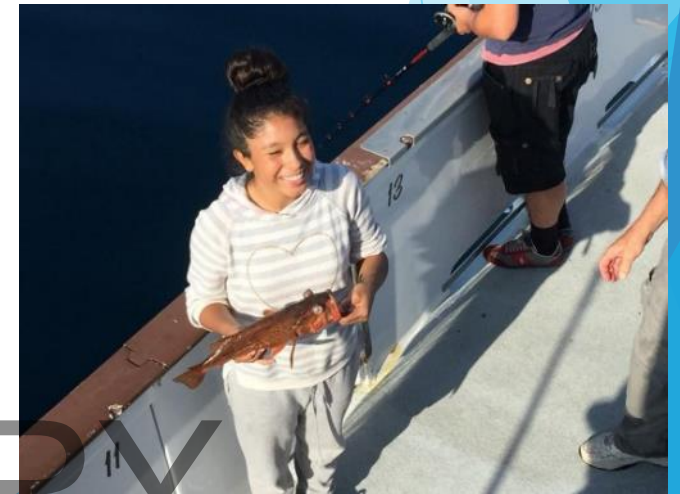
PRELIMINARY

Percent who have gone recreational fishing in the past 5 years:



$p < .05$

PRELIMINARY



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Responsive Management Report



Specializing in Survey Research on Natural Resource and Outdoor Recreation Issues

March 2014

Targeted Marketing Approach Paves Way for \$1.7 Million Increase in Washington State Fishing License Revenue

Roughly five years worth of marketing and applied research conducted by Responsive Management for the Washington Department of Fish and Wildlife (WDFW or the Department) has begun to yield dramatic increases in fishing participation in the state. A targeted marketing approach, based on an analysis of license sales and demographic trends as well as the findings of several scientific telephone surveys and focus groups, has helped WDFW create enough anglers to increase sales of its freshwater fishing licenses by 9%, its temporary licenses by 16%, and its combination licenses by 28%. Overall revenue from fishing license sales in Washington is up \$1.7 million. These encouraging results demonstrate that, when implemented correctly, high-quality, scientific state-specific research helps agencies not only to better understand and serve constituents but to bolster the stability of the organization as well.

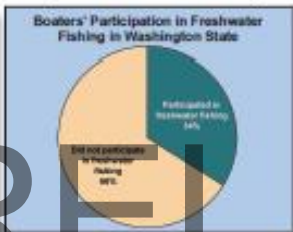
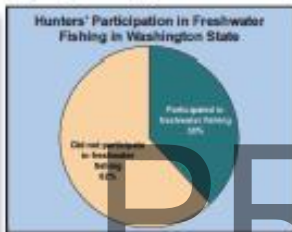
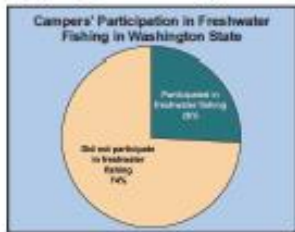


All photos provided by WDFW

fishing participation in the state. The initial step in the process was the creation of a comprehensive marketing plan, which identified the opportunities and challenges then facing the WDFW Fish Program.

One of the chief purposes of the plan was to determine how to market fishing to the needs and desires of Washington residents—this meant exploring demographic trends within

key target markets (first-time buyers, urban residents, sporadic license buyers, women, youth, etc.) to assist WDFW in better understanding its constituencies. In addition to the analysis of state demographic trends, the initial marketing plan provided an in-depth assessment of historical fishing participation and license sales in the state. The plan also incorporated research examining the



impact of changes in license fees on fishing participation and the results of previously implemented marketing and promotional efforts focusing on fishing. The marketing plan resulted in a series of communications strategies and outreach recommendations for increasing freshwater fishing participation and related license sales in Washington State.

In 2011, Responsive Management worked with Jodi Valenta of Mile Creek Communications to further build on the recommendations in the 2009 plan by developing a larger-scale effort to provide strategic direction to WDFW's Inland Fisheries Program. During this phase, Responsive Management conducted various marketing

workshops with WDFW personnel, reviewed research offering insights into successful elements of WDFW's past communications efforts, and identified

These encouraging results demonstrate that, when implemented correctly, high-quality, scientific state-specific research helps agencies not only to better understand and serve constituents but to bolster the stability of the organization as well.

related challenges, barriers, and best practices for future outreach and marketing.

The marketing plan set a goal of increasing fishing participation among specific target markets within active, occasional, and lapsed angler groups. In addition, one of the most important recommendations to come out of the 2011 phase of research was a strategy to focus WDFW freshwater fishing communications and outreach

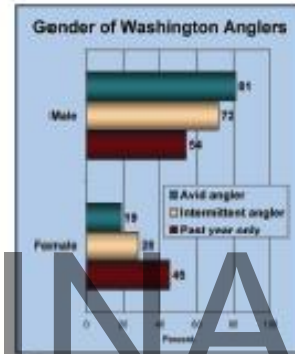
efforts on other outdoor recreation groups. For example, a 2007 survey conducted as part of the Washington State Comprehensive Outdoor Recreation Plan found that only 26% of Washington campers and 38% of Washington hunters participated in freshwater fishing. At the same time, the data also indicated that those with a preexisting interest in relevant outdoor recreation (such as camping and hunting) would be among the most likely groups to begin participating in freshwater fishing.

To build on the concept of engaging outdoor recreationists who were not active freshwater anglers, the researchers recommended a marketing theme based on the message, "Fish Washington—Expand Your Outdoor Experience."

Chris Donley, WDFW inland fish program manager, described some of the steps the agency took following the marketing research. "To put it in context, our fishing license sales were flat in 2009 and 2010. We implemented some changes with the way we stocked fish and then promoted it through the marketing plan that Responsive Management developed, targeting the right audiences: intermittent anglers, boaters, campers, hunters. There were a number of different promotions: stocking fish and promoting it over Father's Day, doing splash landing pages with active, occasional, and lapsed angler groups. In addition, one of the most important recommendations to come out of the 2011 phase of research was a strategy to focus WDFW freshwater fishing communications and outreach



(Continued on page 4)



PRELIMINARY

**How does fishing participation as a child
compare with fishing participation as an adult?**

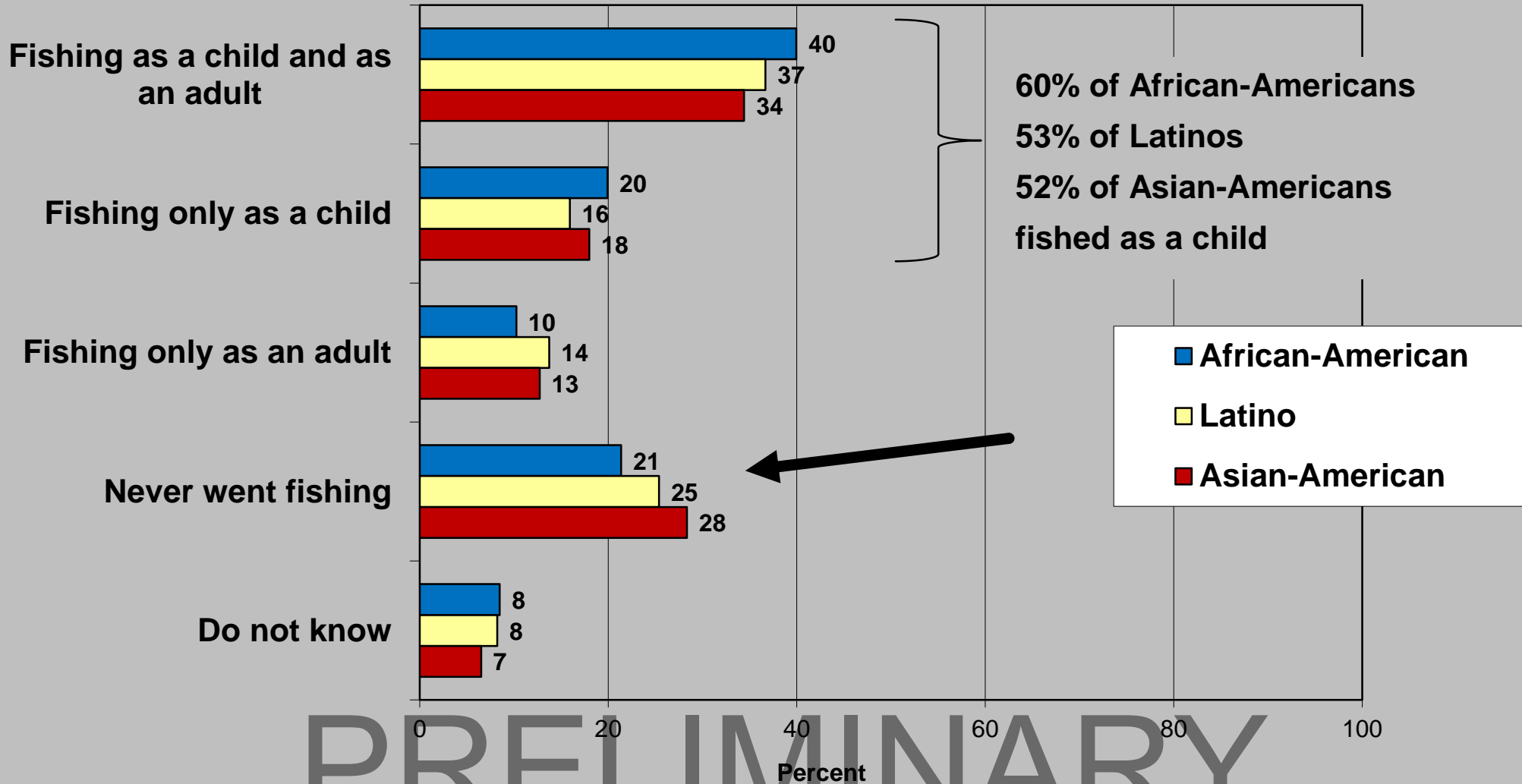
PRELIMINARY

Did you ever go fishing as a child? And what about as an adult? (U.S. residents)



PRELIMINARY

Did you ever go fishing as a child? And what about as an adult?

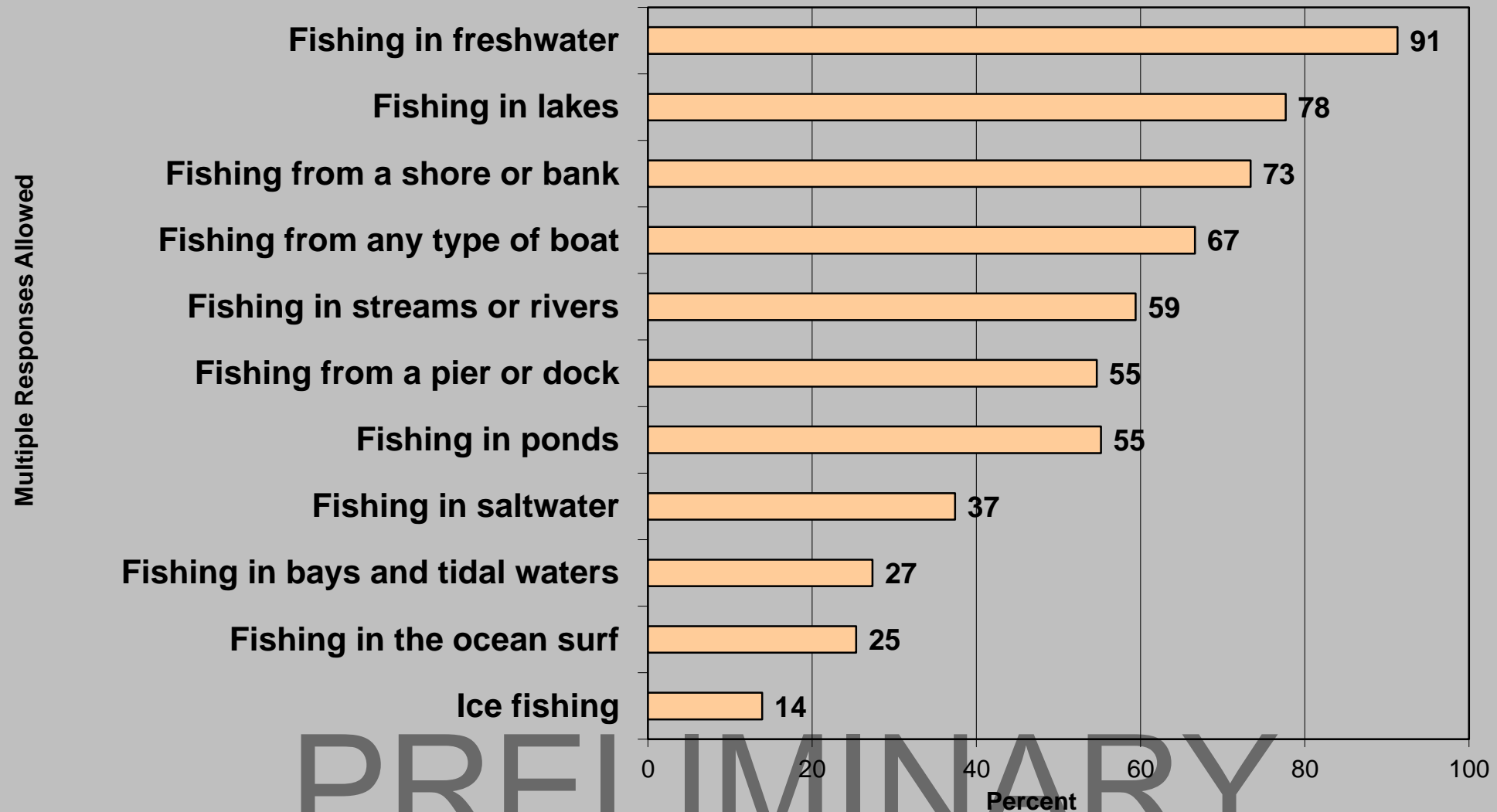


PRELIMINARY

**What types of fishing are Americans
doing most?**

PRELIMINARY

When you fish, which of the following types do you do? (Among U.S. residents who fished in the past 5 years.)

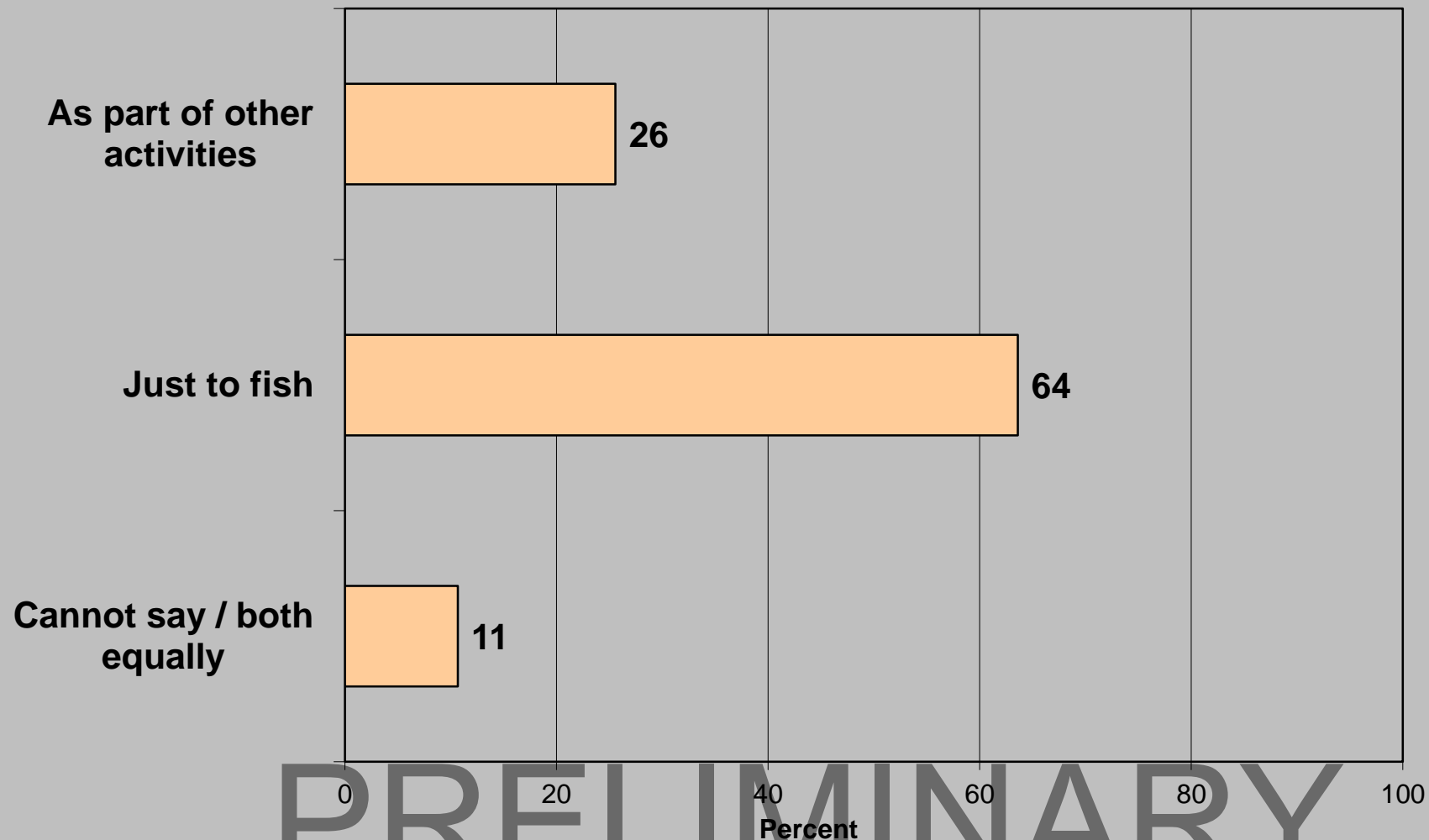


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What does a typical fishing trip look like?

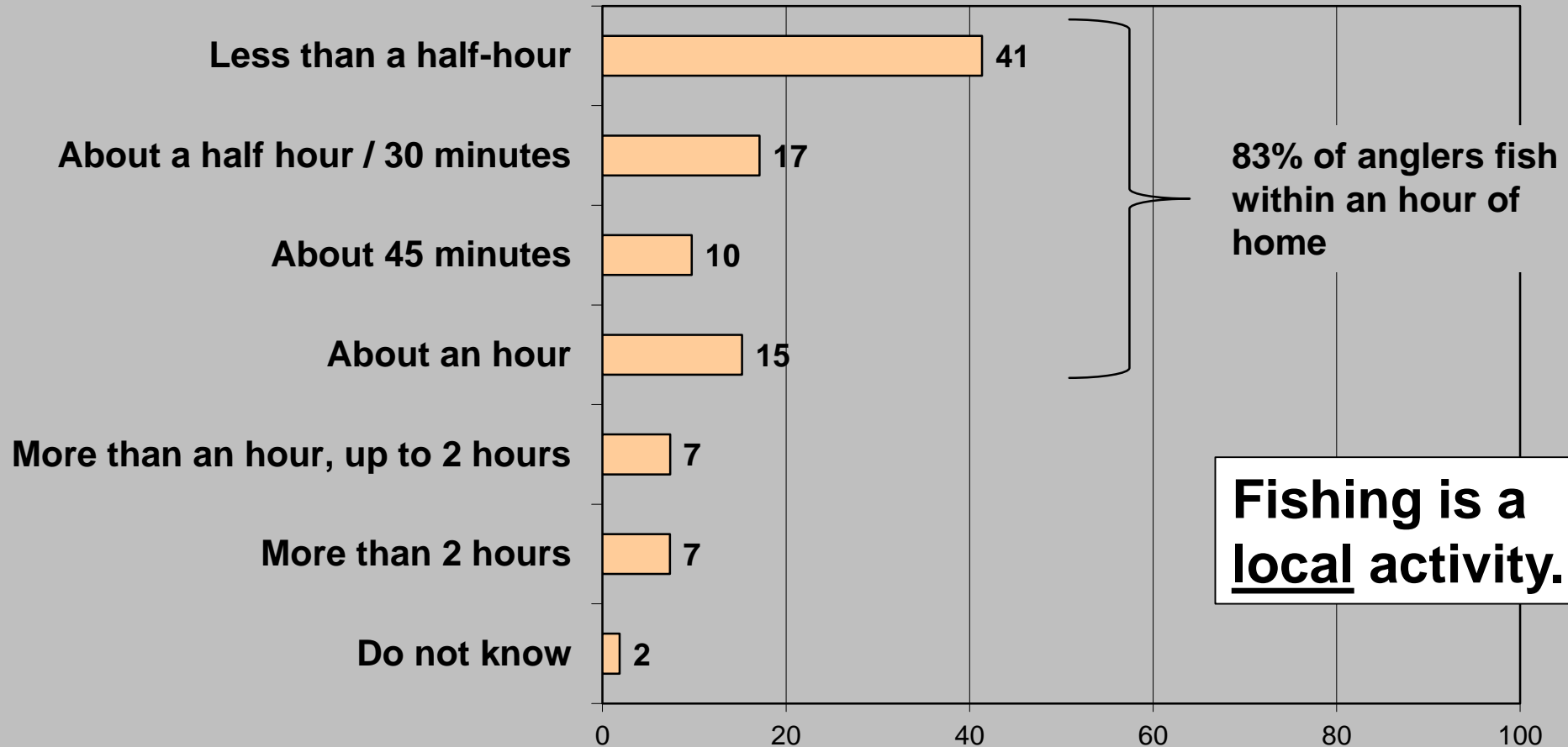
PRELIMINARY

When you go fishing, is it typically as part of other activities, or do you go out just to fish? (Among U.S. residents who fished in the past 5 years.)



PRELIMINARY

How long does it take to get to your typical fishing spots? (Among U.S. residents who fished in the past 5 years.)

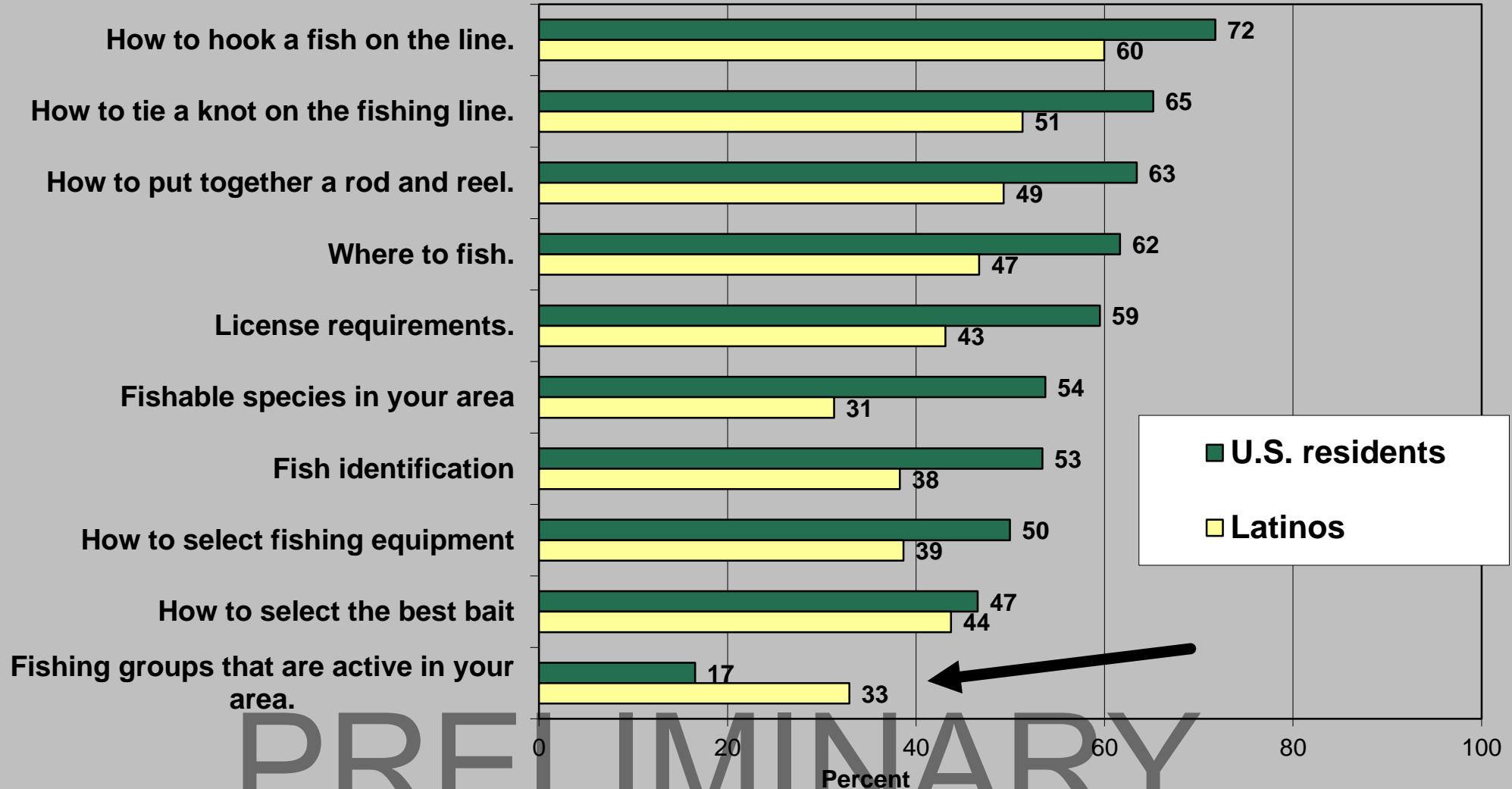


PRELIMINARY

**What aspects of fishing are people
most knowledgeable about?**

PRELIMINARY

Percent of those who have ever fished who indicated being very knowledgeable or somewhat knowledgeable about each of the following:

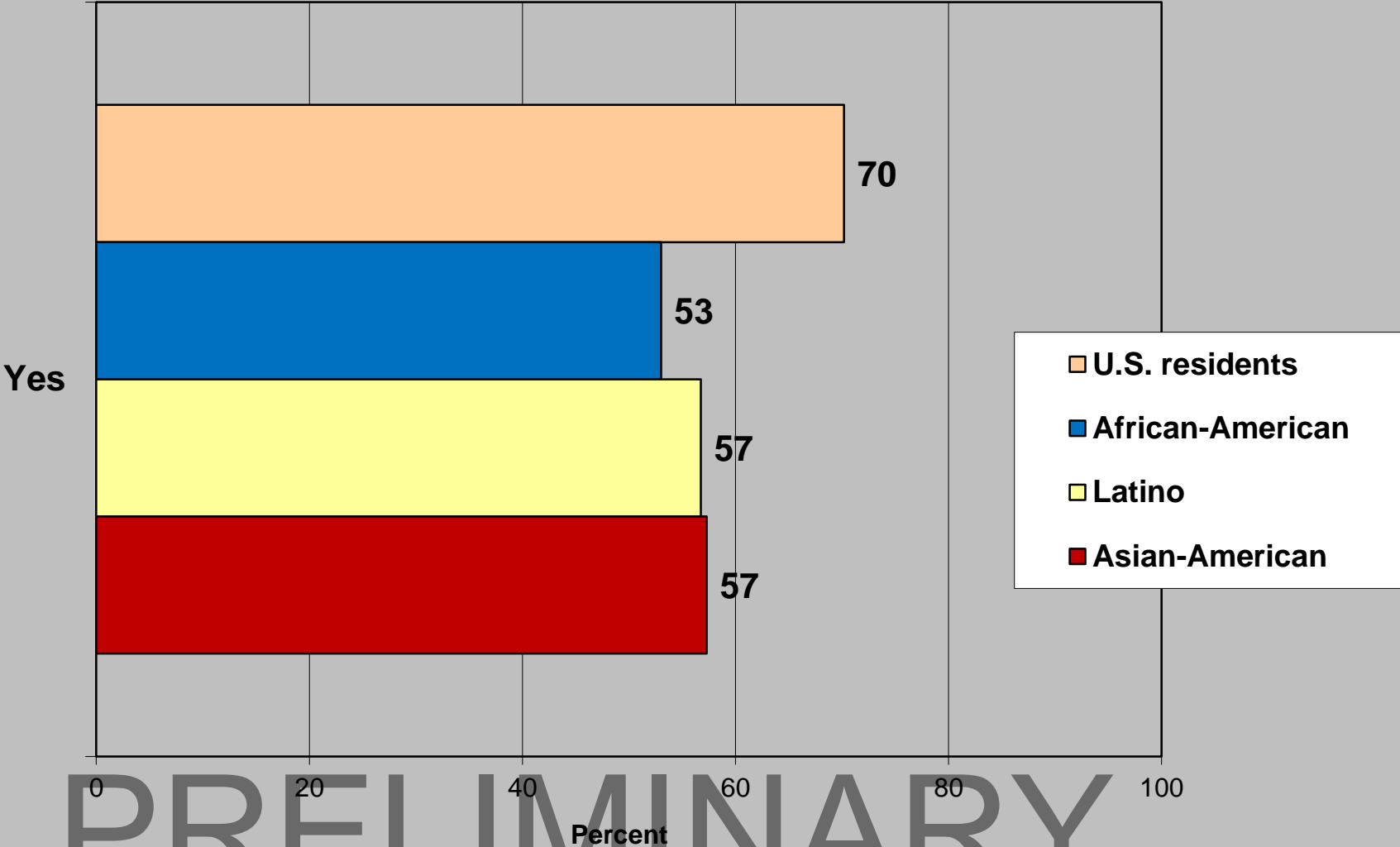


PRELIMINARY

**How common is mentoring
when it comes to fishing?**

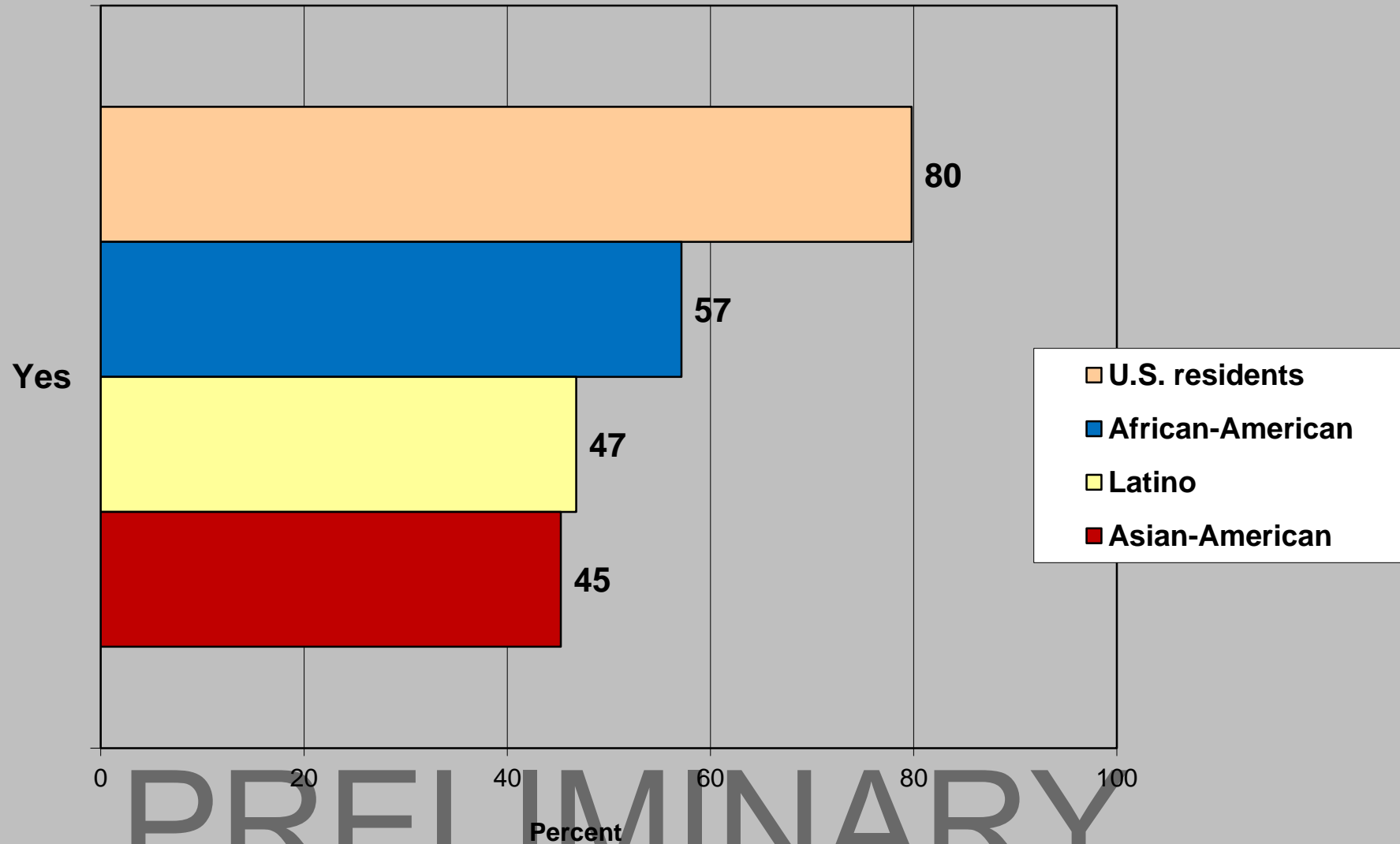
PRELIMINARY

**Have you ever taught anybody to fish?
(Among those who have fished in the past 5 years.)**

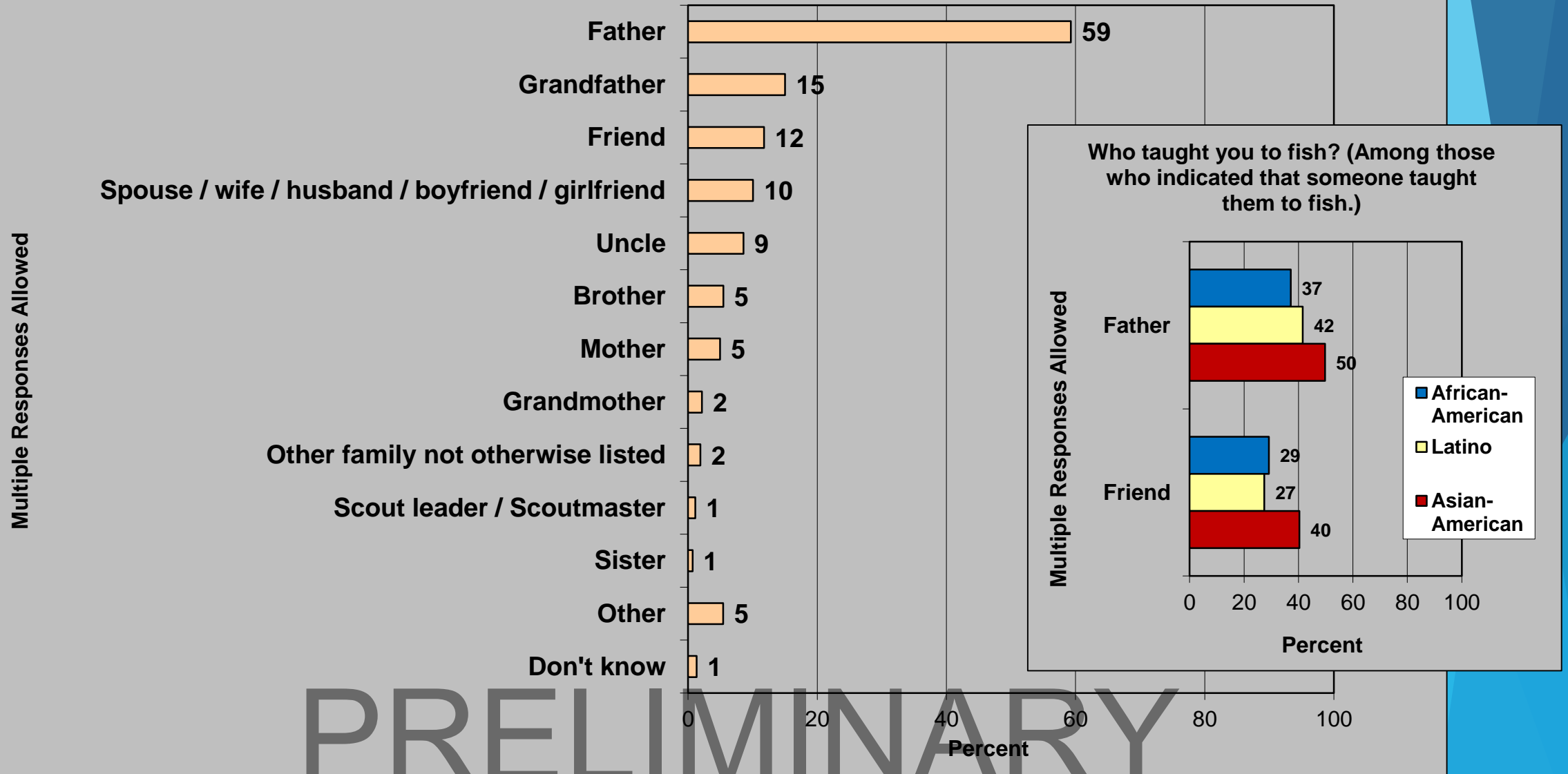


PRELIMINARY

Has anybody ever taught or tried to teach you how to fish?



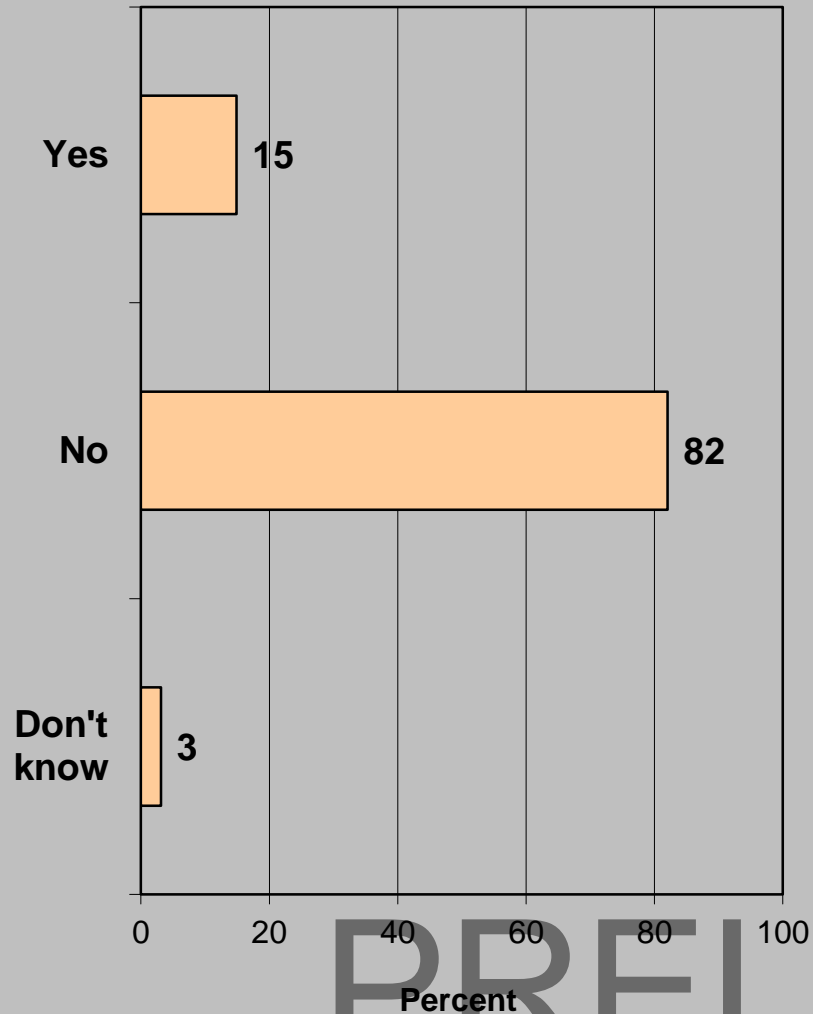
Who taught you to fish? (Among U.S. residents who indicated that someone taught them to fish.)



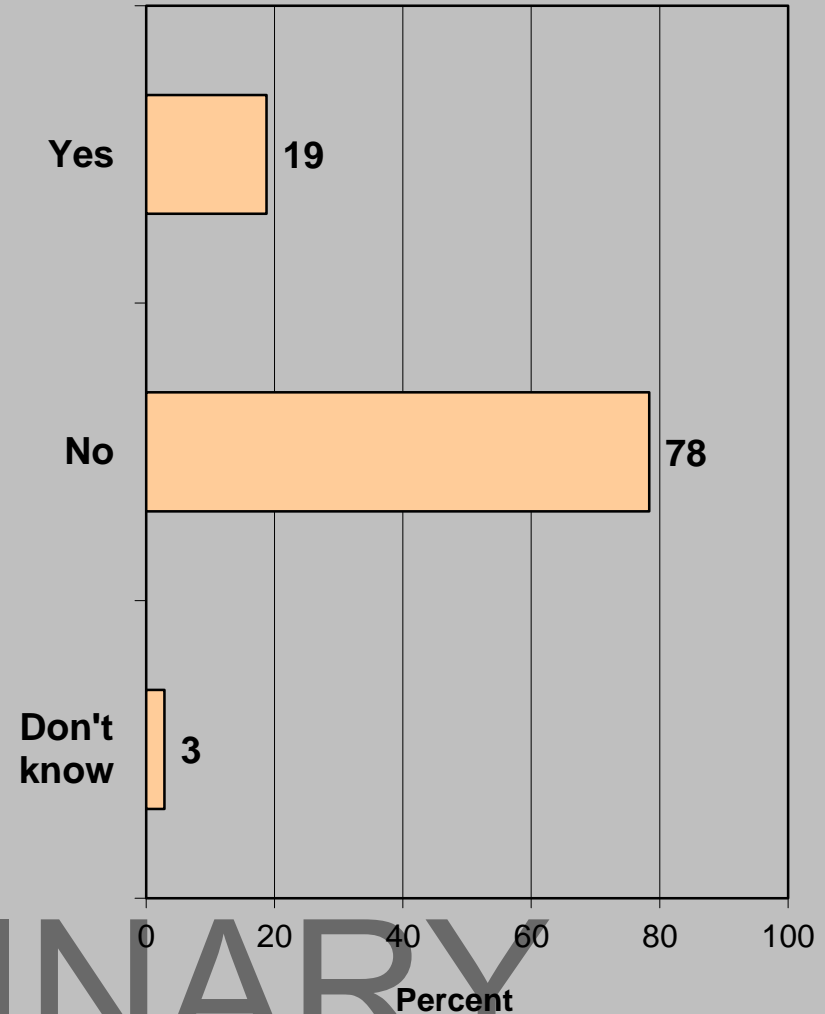
**How common is self-instruction
when it comes to fishing?**

PRELIMINARY

Did you ever learn or try to learn any fishing techniques through online videos? (U.S. residents)



Did you ever do any other self-teaching methods to learn to fish, other than online videos? (U.S. residents)

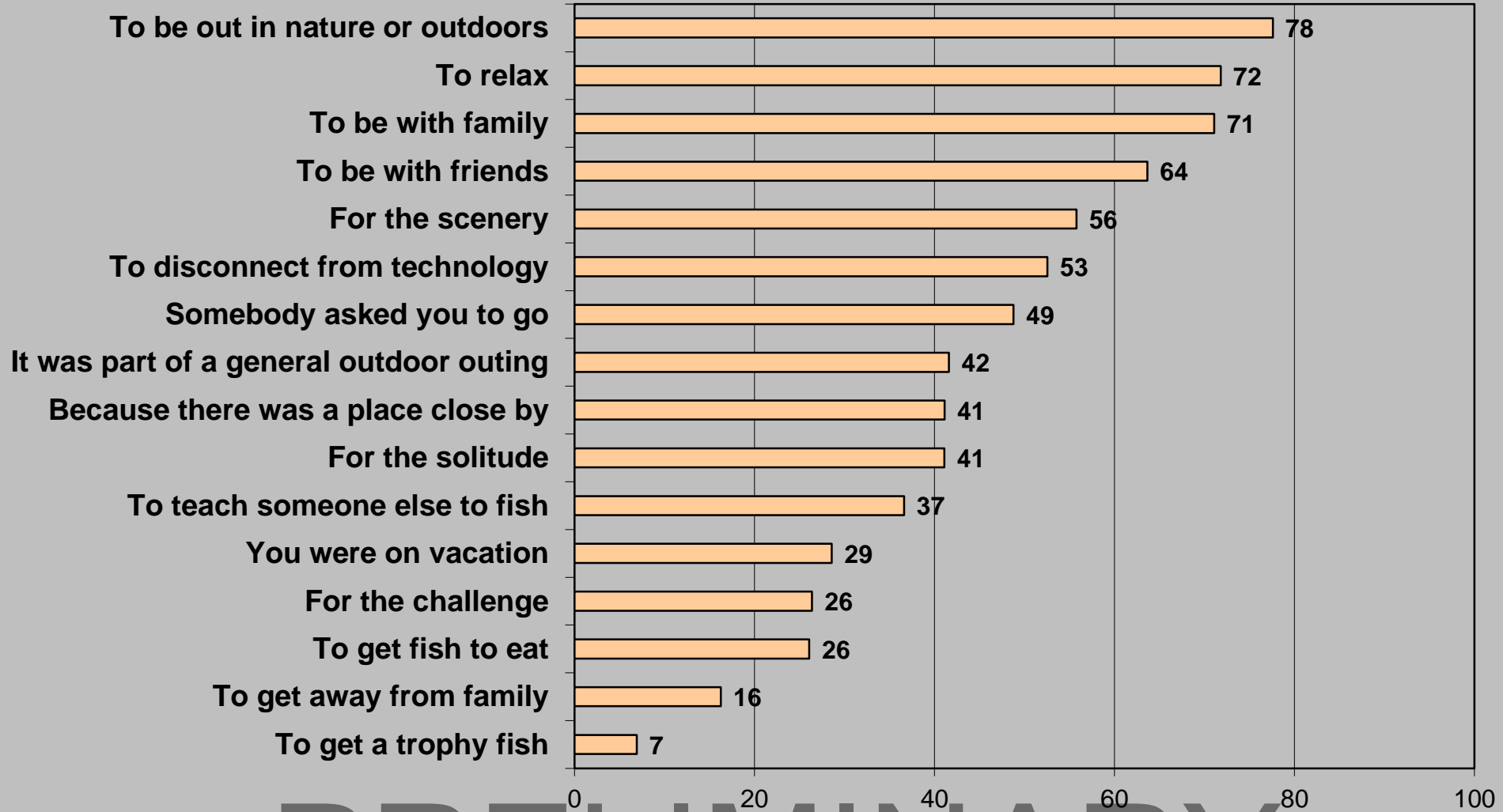


PRELIMINARY

What are the most important motivations for going fishing?

PRELIMINARY

Among those who fished in the past 5 years, the percent who indicated that each of the following was a very important reason they went fishing. (U.S. residents)



PRELIMINARY
Percent

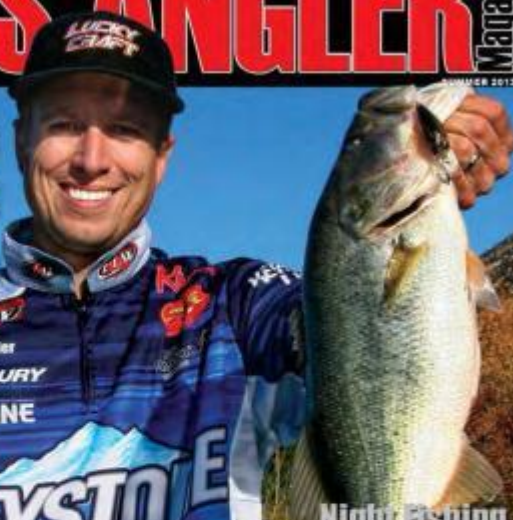
COVERING THE LATEST TECHNIQUES WITH THE BEST PROS

BASS ANGLER

Magazine

Since 1991

Mike Iaconelli
Unlocks the D.T.C.
for Summer Bass



FLORIDA EDITION

KITE INSIGHT
Everything You Need to Get Stared

MOON FISH!
FLORIDA PERMIT
AFTER DARK

Alton Jones
Targets, Temptations
and Thermoclines

John Crews
Punching Craws

Brian Butler
Jointed Swimbaits

Terry Bolton
Summertime Creeks

KEYSTONE LIGHT

LUCKY CRAFT

SUNLINE

MERCURY

PRELIMINARY PREDICTIONS & SOLUNAR FEED TIMES

The Secrets Behind Summertime Rip-Confidence Minus Emotions Can = More

TEXAS SALTWATER FISHING MAGAZINE

MAKE BASSING GREAT AGAIN

Dave Roberts'
GREAT KAYAK ROADTRIP

Christmas SPECIAL EDITION
GIFT GUIDE



FLORIDA EDITION

ZERO IN ON WINTER TROPHY

PRE- AND FISHING

FLORIDA SPORTSMAN

Since 1969

BAN THE NETS, AGAIN! SEE OPENERS, PAGE 7

TUNA SECRETS
BONITO YOU'LL CRAVE

DOWNTOWN JAX
THE ZONE FOR REDS AND TROUT

PLUS: JARPON SEASON
KEYS DREAMBOAT
BAHAMAS GETAWAY
SEAGRASS SURVEY
CCA STAR NOTES

SUMMER'S BEST

OUR TOP PICKS
• FISHING
• DIVING
• HUNTING
• COOKING
• TRAVEL

WIN! ONE OF TEN PRIZES FROM BUFF IN OUR €480-GIVEAWAY!

SEA FISHING

MAGAZINE

EXCLUSIVE
FISHING ICELAND
JOHN POPPELWELL HEADS TO
THE LAND OF ICE AND FIRE.

ON TEST!

- THE NEW CENTURY ELIMINATOR T1000
- THE NEW THONIXPRO ENVOY REEL



COD ALMIGHTY!

TOP COD AND POLLACK ACTION
IN THE ENGLISH CHANNEL

A FISHING CHRISTMAS GIFT GUIDE INSIDE!

SPORT FISHING THE MAGAZINE

APRIL 2008

GET READY TO BAG THE

BASS of a LIFETIME

Three Top Northeast Skippers
Reveal How They Do It!

PLUS:

- NORTH CAROLINA'S EXTENSIVE, OVERLOOKED ARTIFICIAL REEFS — HOW TO FIND & FISH 'EM
- TRY THIS ADVENTURE ABOVE THE ARCTIC CIRCLE
- IGFA TO ACCEPT VISUAL ESTIMATES FOR WORLD RECORDS — NO MORE WEIGHING OR MEASURING — DETAILS, P. 26



PRELIMINARY PREDICTIONS & SOLUNAR FEED TIMES

FLORIDA SPORTSMAN

Since 1969

BAN THE NETS, AGAIN! SEE OPENERS, PAGE 7

TUNA SECRETS
BONITO YOU'LL CRAVE

DOWNTOWN JAX
THE ZONE FOR REDS AND TROUT

PLUS: JARPON SEASON
KEYS DREAMBOAT
BAHAMAS GETAWAY
SEAGRASS SURVEY
CCA STAR NOTES

SUMMER'S BEST

OUR TOP PICKS
• FISHING
• DIVING
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• COOKING
• TRAVEL

PRELIMINARY

Top Motivations for Going Fishing Among...

African-Americans:

- To relax
- For the scenery
- To get away from family
- To be out in nature or outdoors

Latinos:

- To be with family
- To be out in nature or outdoors
- To relax

Asian-Americans:

- To be out in nature or outdoors
- To be with family
- To be with friends
- To relax

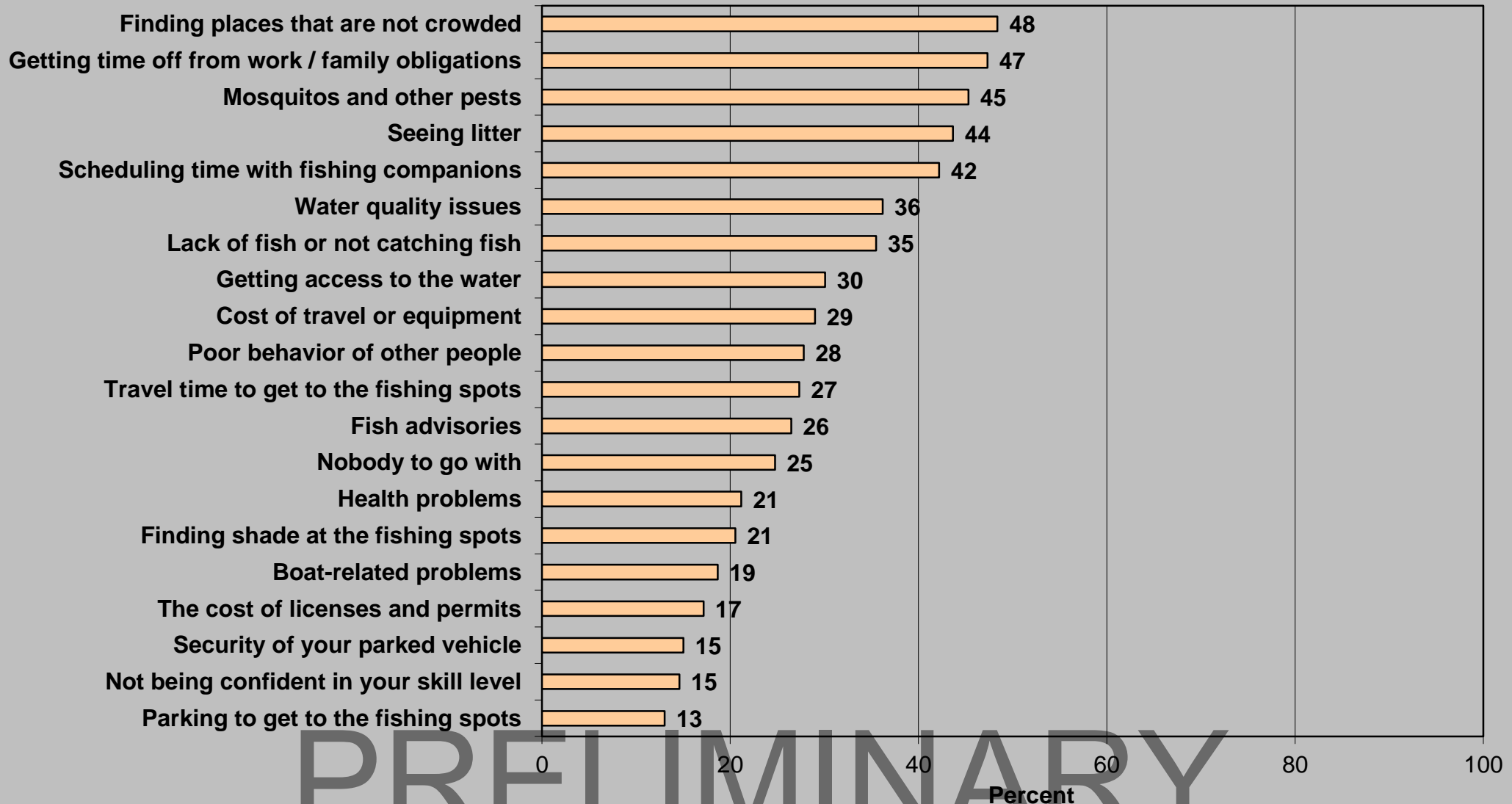


PRELIMINARY

What are the most important things taking away from anglers' enjoyment of fishing?

PRELIMINARY

Fishing dissatisfactions among those who fished in the past 5 years: (U.S. residents)



PRELIMINARY

Top Dissatisfactions Among...

African-Americans:

- Finding places that are not crowded
- Water quality issues
- Nobody to go with
- Seeing litter

Asian-Americans:

- Finding places that are not crowded
- Seeing litter
- Lack of fish / not catching fish
- Mosquitos and other pests

Latinos:

- Lack of fish / not catching fish
- Mosquitos and other pests
- Poor behavior of other people
- Getting time off from work / family obligations

Lapsed Anglers (fished in past 10 years but not in past 5):

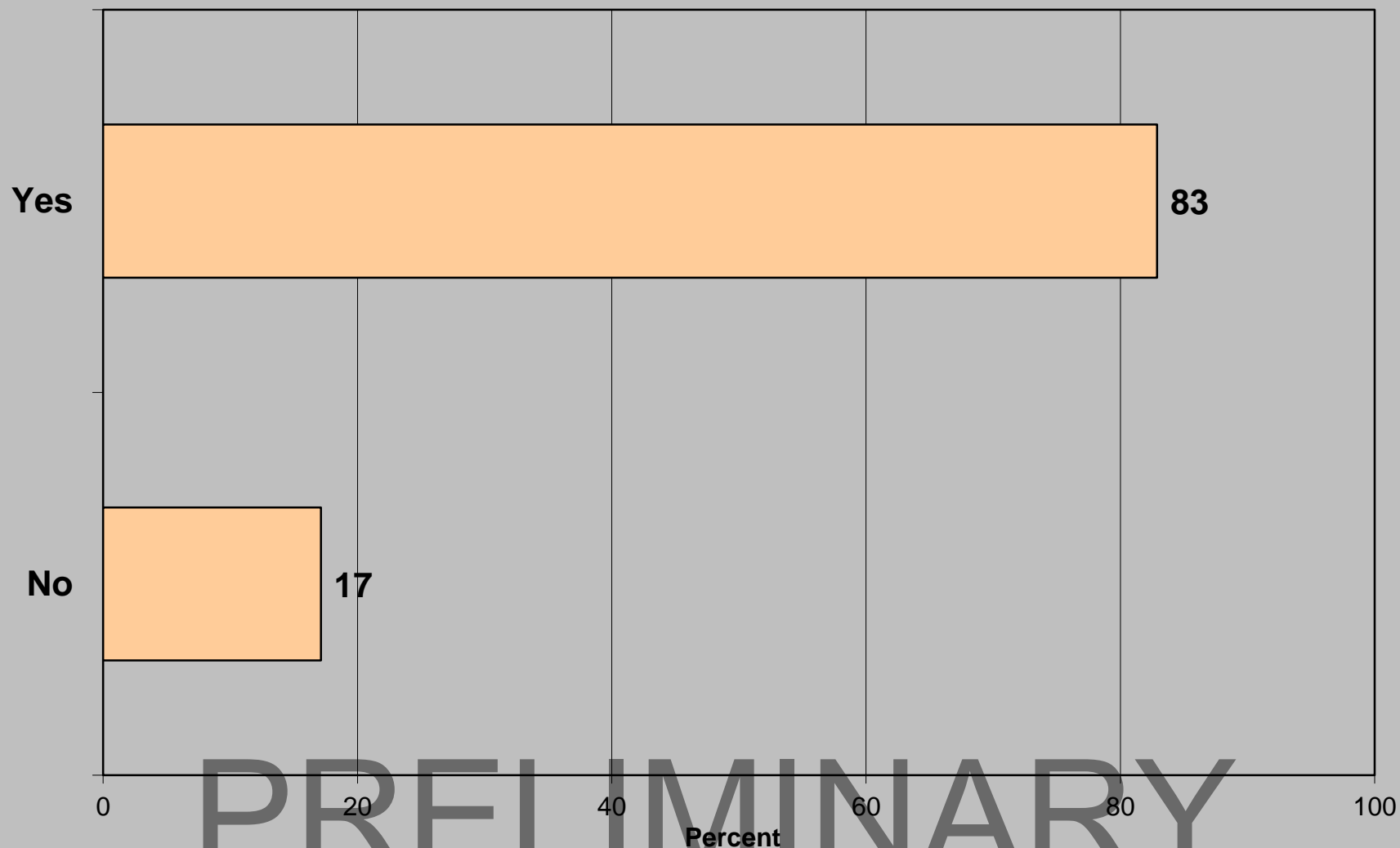
- Health problems
- Mosquitos and other pests
- Getting time off from work / family obligations
- Do not like handling fish

PRELIMINARY

**Is it possible that some anglers have
never purchased a fishing license?**

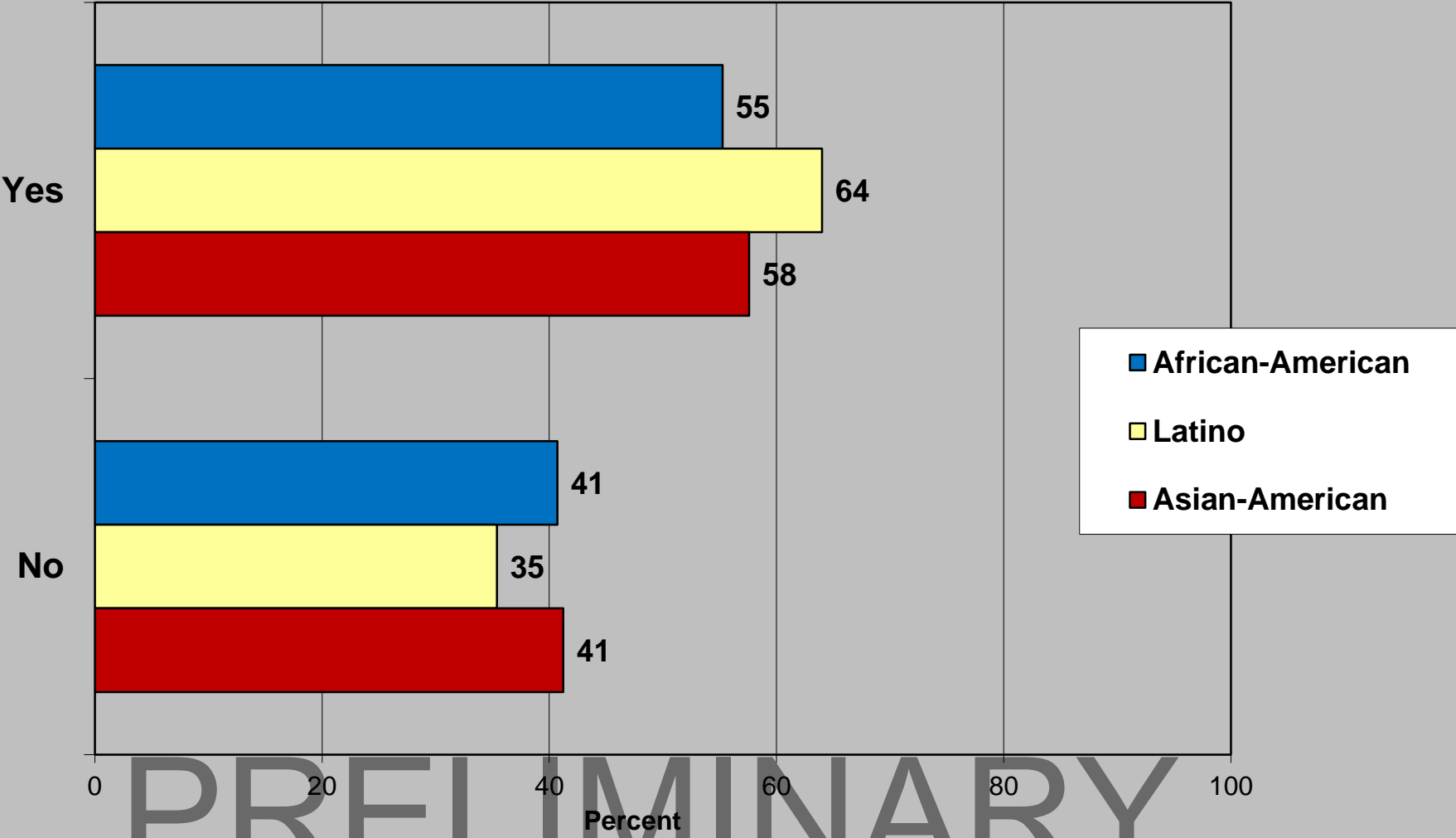
PRELIMINARY

Have you ever purchased a fishing license? (Among U.S. residents who fished in the past 5 years.)



PRELIMINARY

**Have you ever purchased a fishing license?
(Among those who have fished in the past 5 years.)**



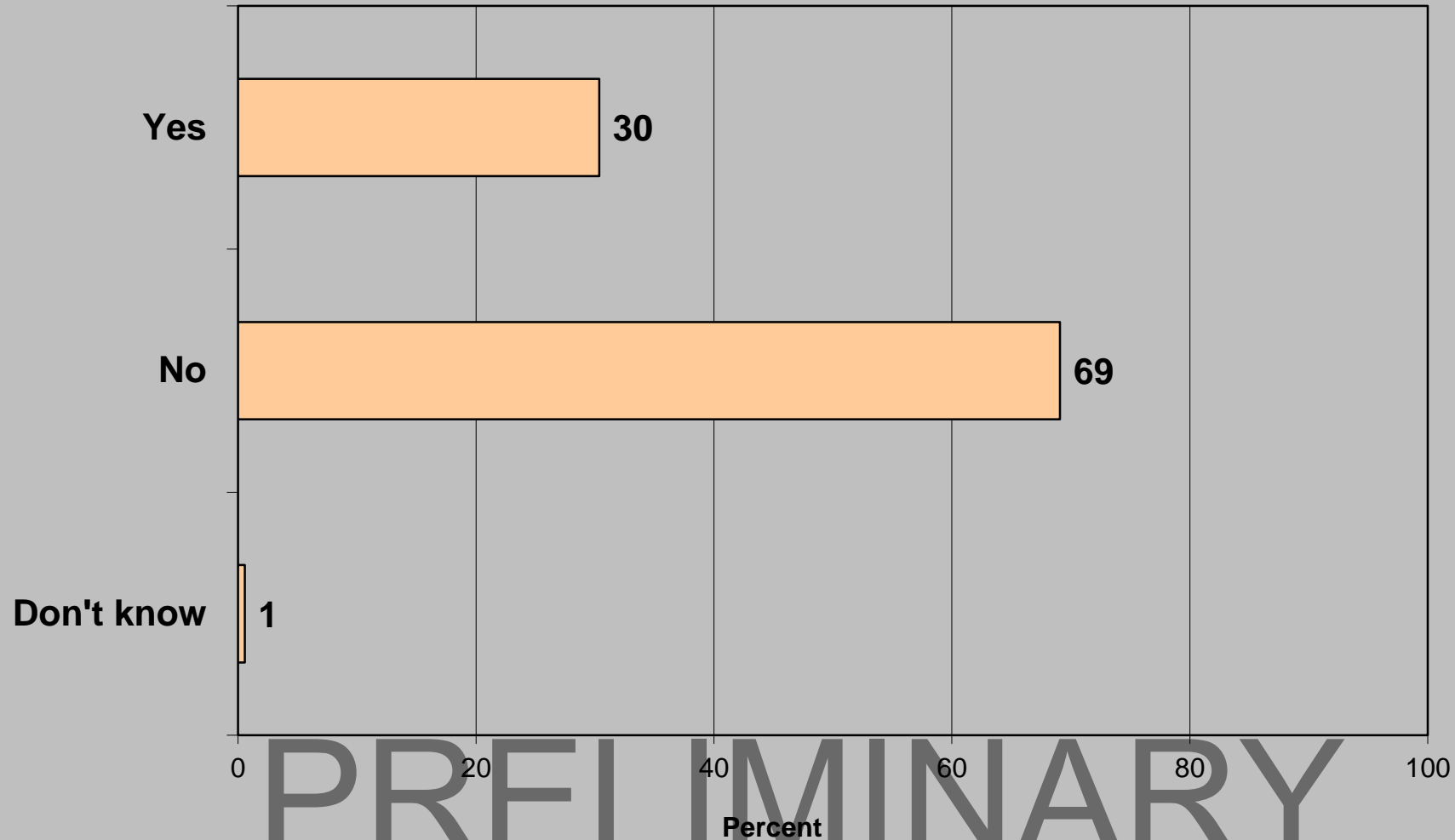
PRELIMINARY

**How are anglers purchasing
their licenses?**

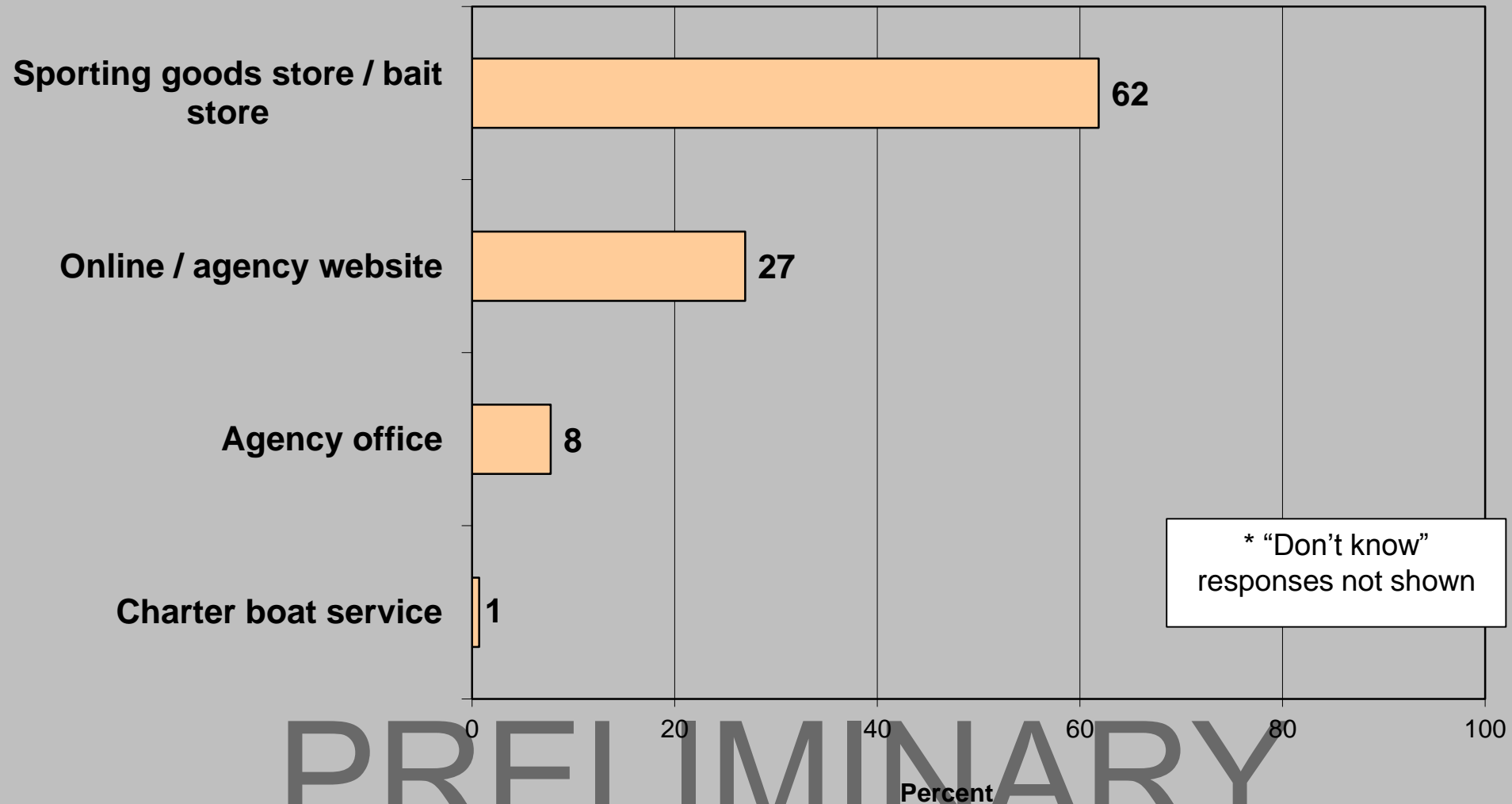
**How do they *prefer* to purchase
their licenses?**

PRELIMINARY

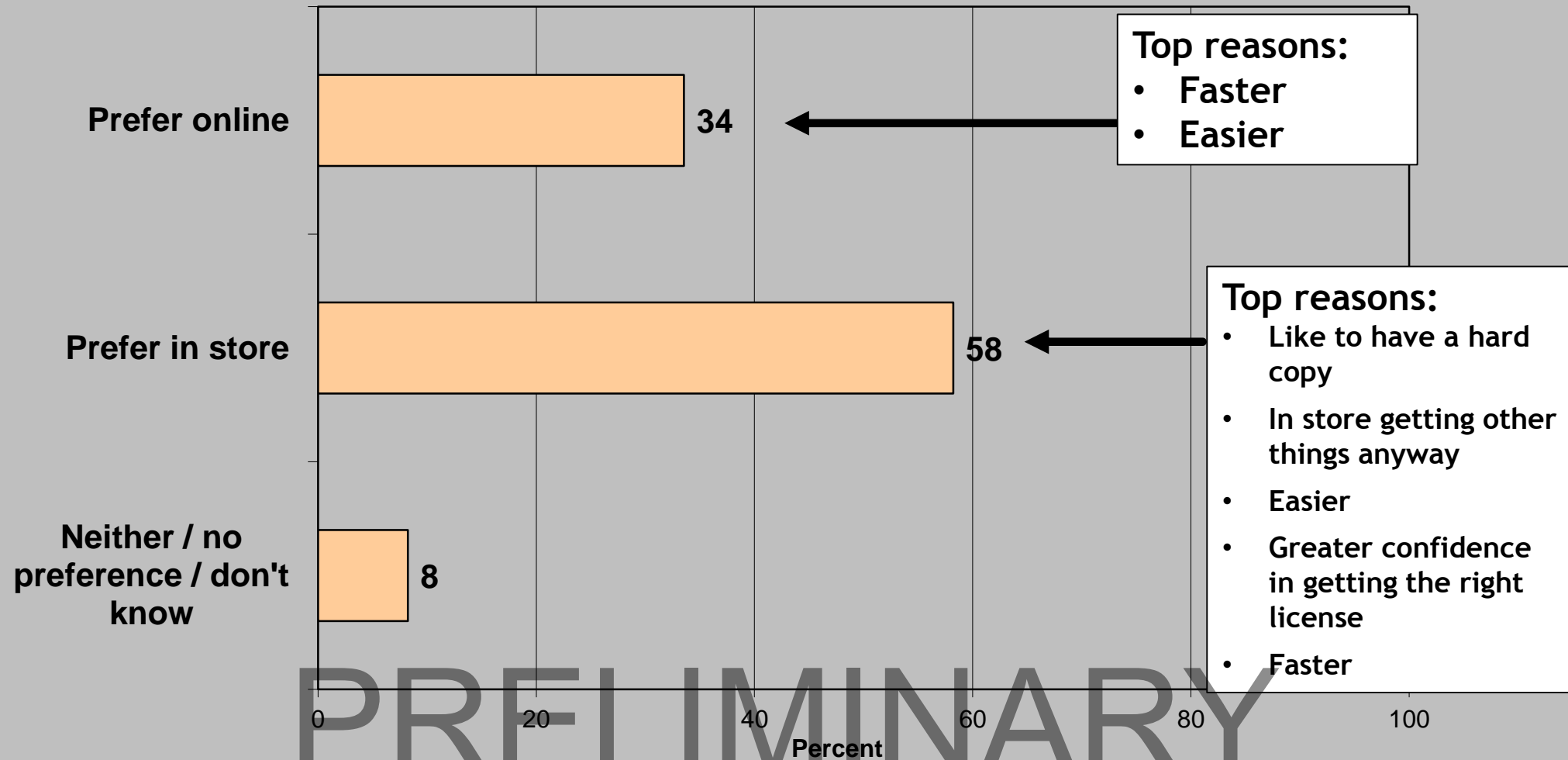
**Have you ever purchased a fishing license on your state's fish and wildlife agency website?
(Among U.S. residents who fished in the past 5 years.)**



**Where did you purchase your most recent fishing license?
(Among U.S. residents who fished in the past 5 years.)**



**For your next fishing license purchase, would you prefer to buy it online from the agency or in a sporting goods store or guide service?
(Among U.S. residents who fished in the past 5 years.)**



PRELIMINARY

Which technologies are anglers most likely to use to renew their licenses or get information on fishing?

PRELIMINARY

Percent who would be very likely to use each of the following to renew their license:

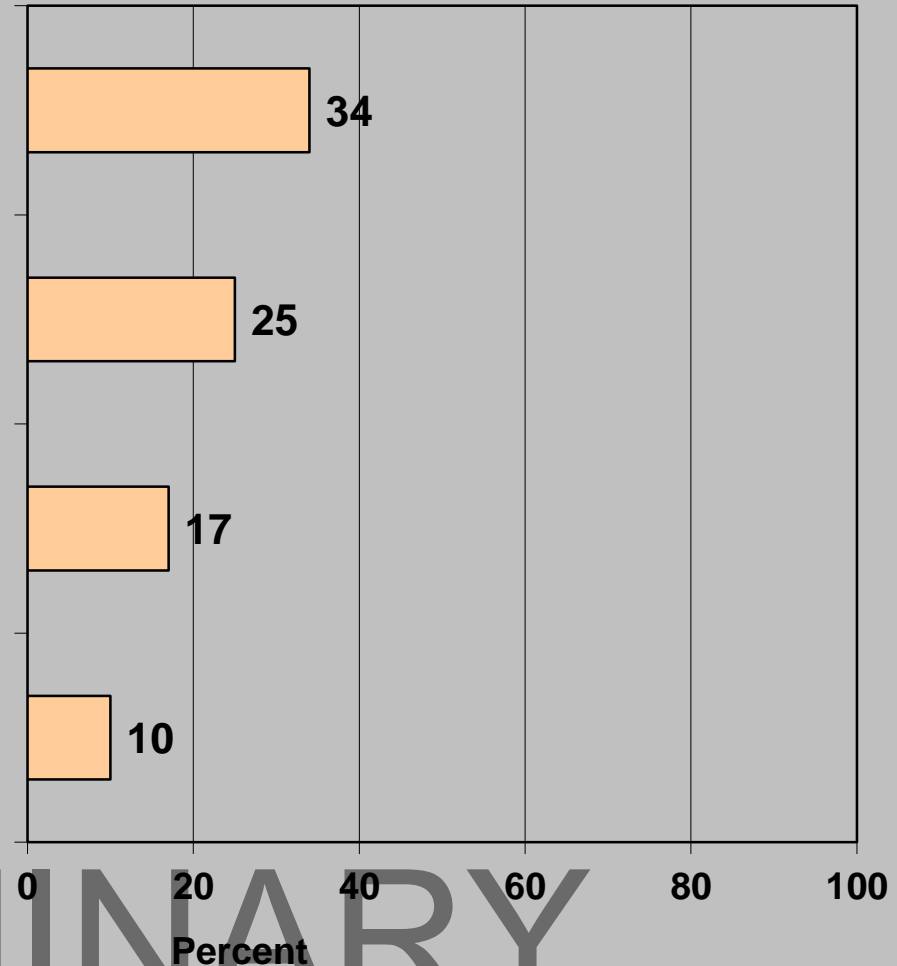
(Among U.S. residents who fished in the past 5 years.)

An email reminder that included a link that took you directly to your state's license purchase site

An app on your phone

A phone text reminder that included a link that took you directly to your state's license purchase site

An auto renewal service where a credit card on file is automatically charged for your yearly license fee

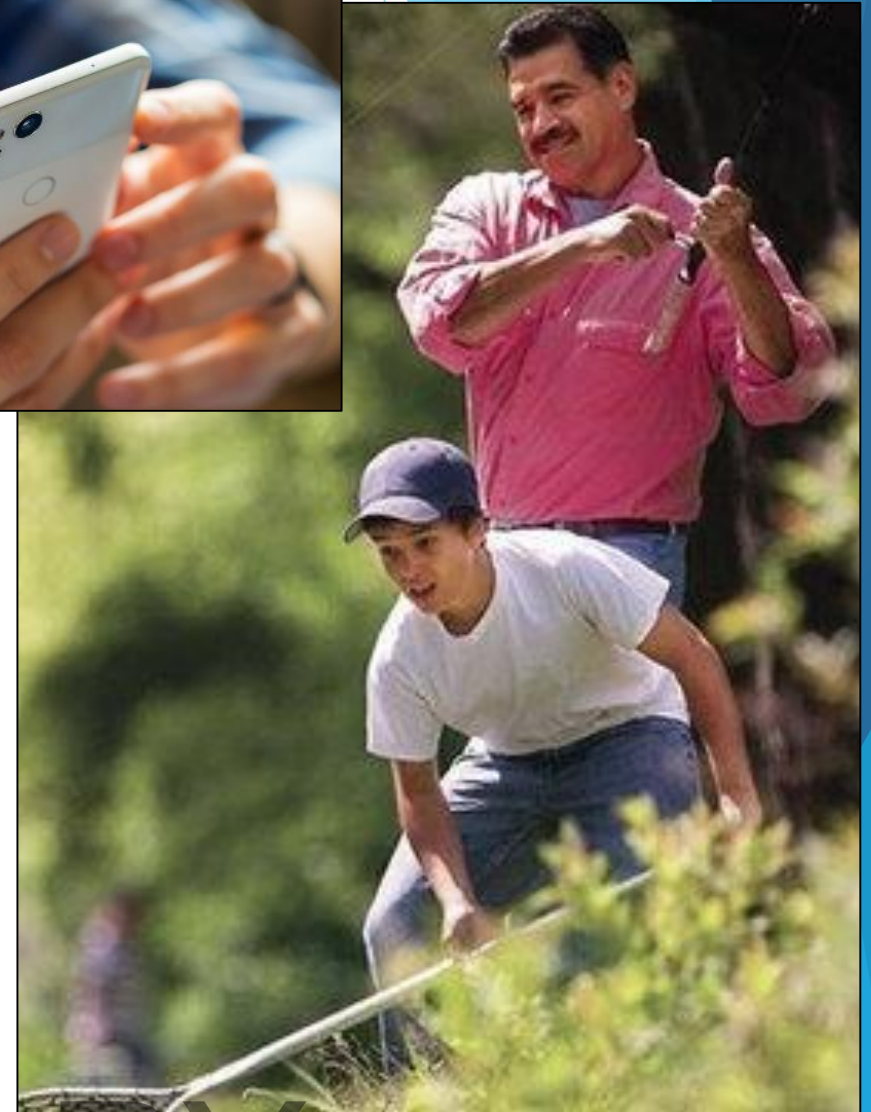


PRELIMINARY

Regarding a free phone app providing an all-in-one source for where to fish, what's biting, local events, and license requirements:

- **20% of U.S. residents overall**
- **25% of African-Americans**
- **25% of Latinos**
- **20% of Asian-Americans**

would be *very likely* to use it.



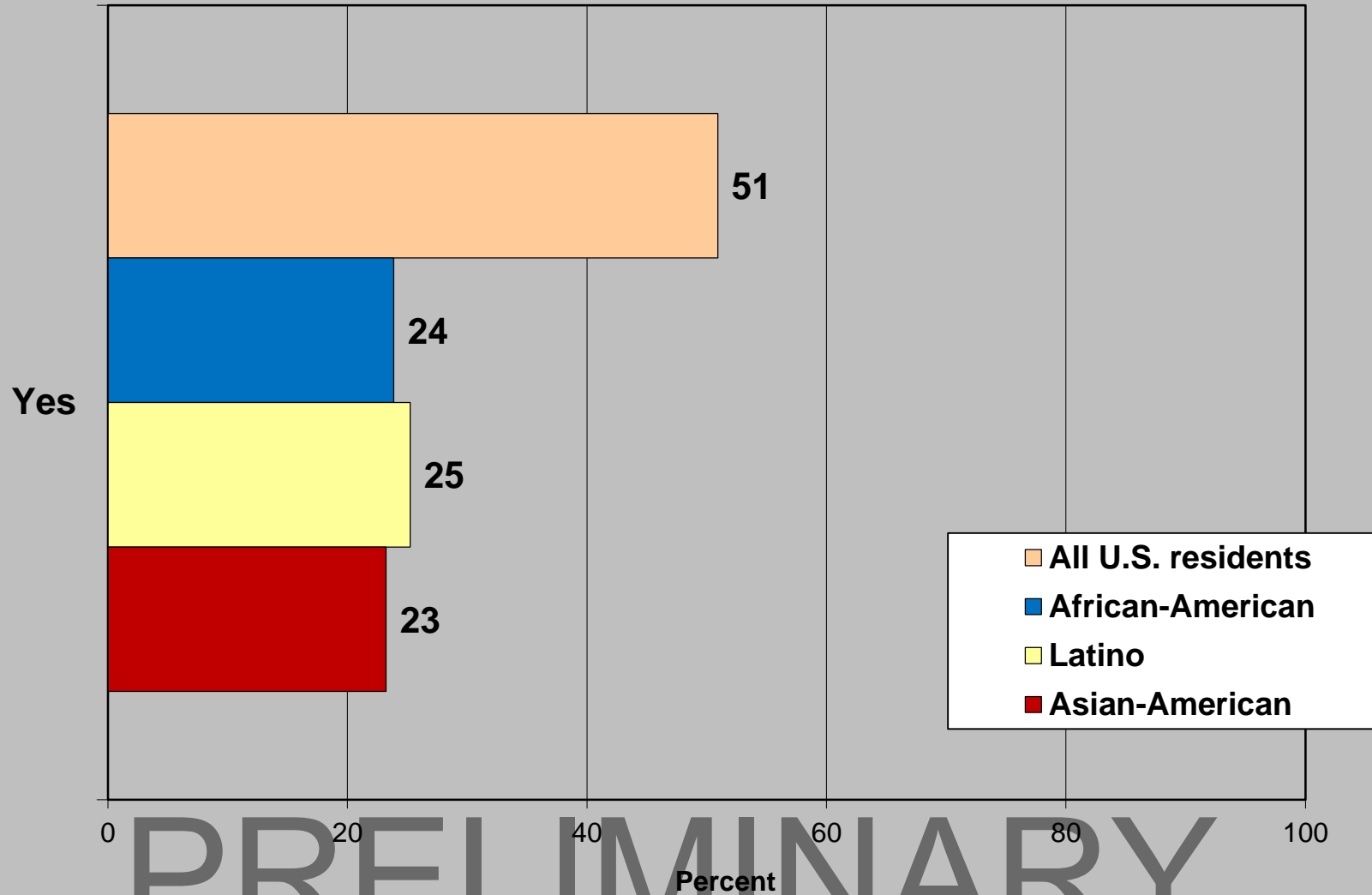
PRELIMINARY

**Are people seeing and hearing much
about recreational fishing?**

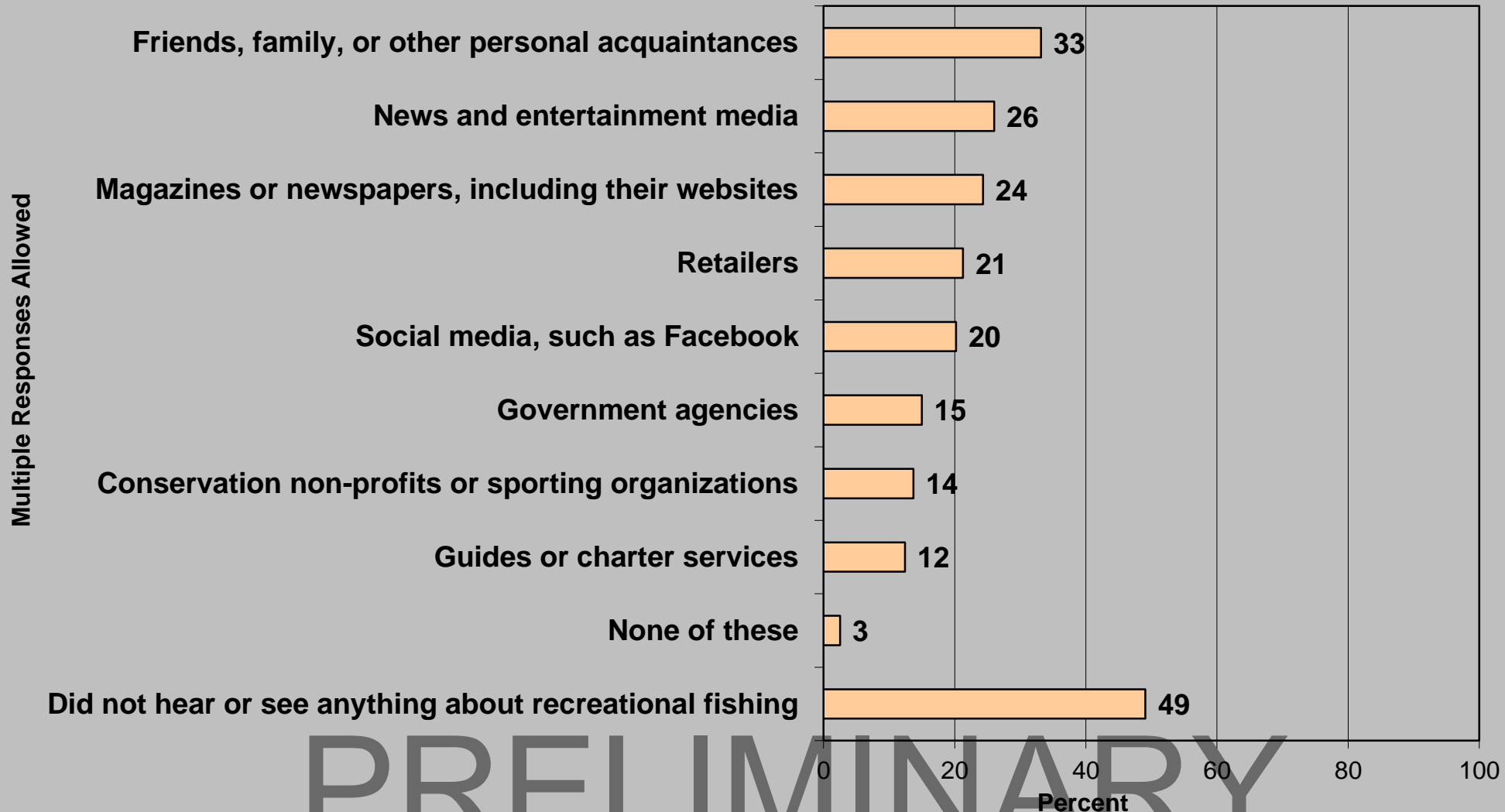
Where are they seeing and hearing it?

PRELIMINARY

Did you hear or see anything about recreational fishing in the past 5 years?

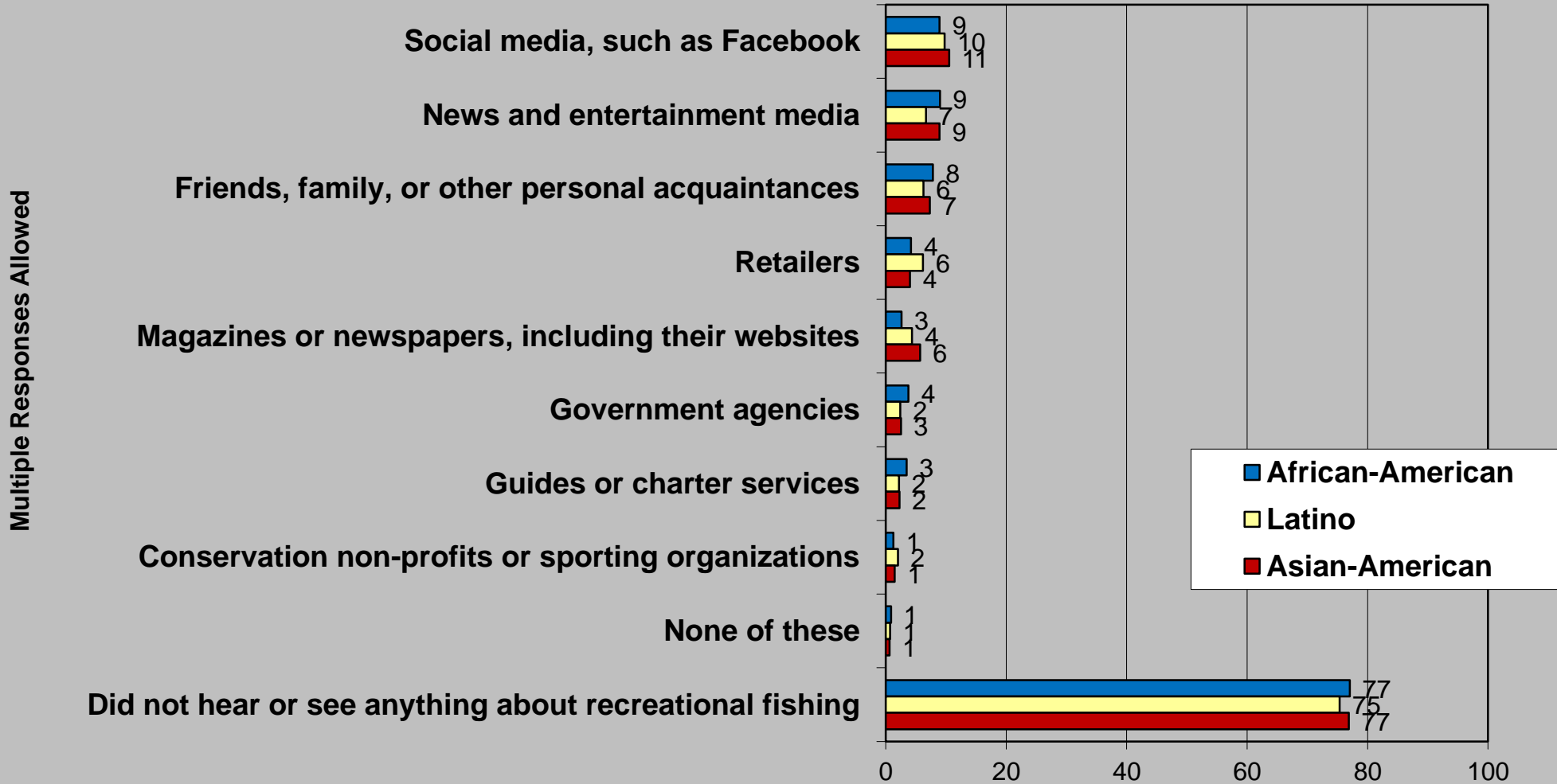


Please tell me if you saw or heard anything about recreational fishing from the following in the past 5 years. (U.S. residents)



PRELIMINARY

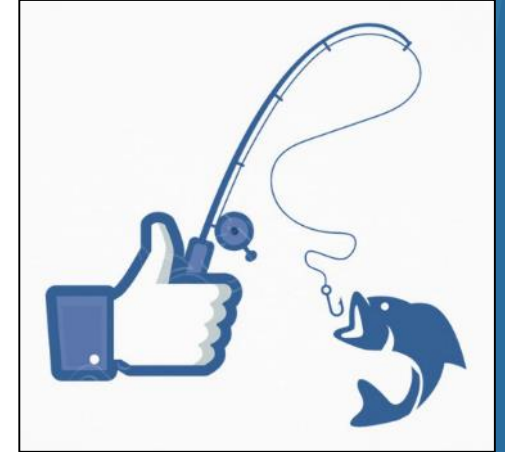
Please tell me if you saw or heard anything about recreational fishing from the following in the past 5 years.



PRELIMINARY

Social Media

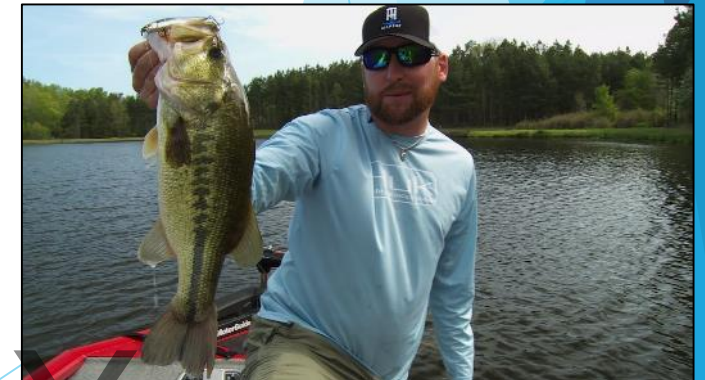
- Facebook is by far the most common social media source on fishing, followed by YouTube and Instagram
 - Latinos in particular heard/saw from Instagram
 - Asian-Americans in particular heard/saw from YouTube
 - Most information about fishing on social media is positive
- Among those who heard/saw info about fishing on social media, about a quarter follow their state fish and wildlife agency on Facebook



Instagram



YouTube



PRELIMINARY

News and Entertainment Media

- The most common news/entertainment media sources on fishing include the 4 major networks, the Discovery Channel, PBS, CNN, the Travel Channel, ESPN, and the History Channel
 - Asian-Americans in particular heard/saw from the Discovery Channel, CNN, and the Travel Channel
 - African-Americans in particular heard/saw from ABC and CBS
 - Most information about fishing in the news and entertainment media is positive



PRELIMINARY

30% of U.S. residents purchased fishing equipment in the past 5 years.

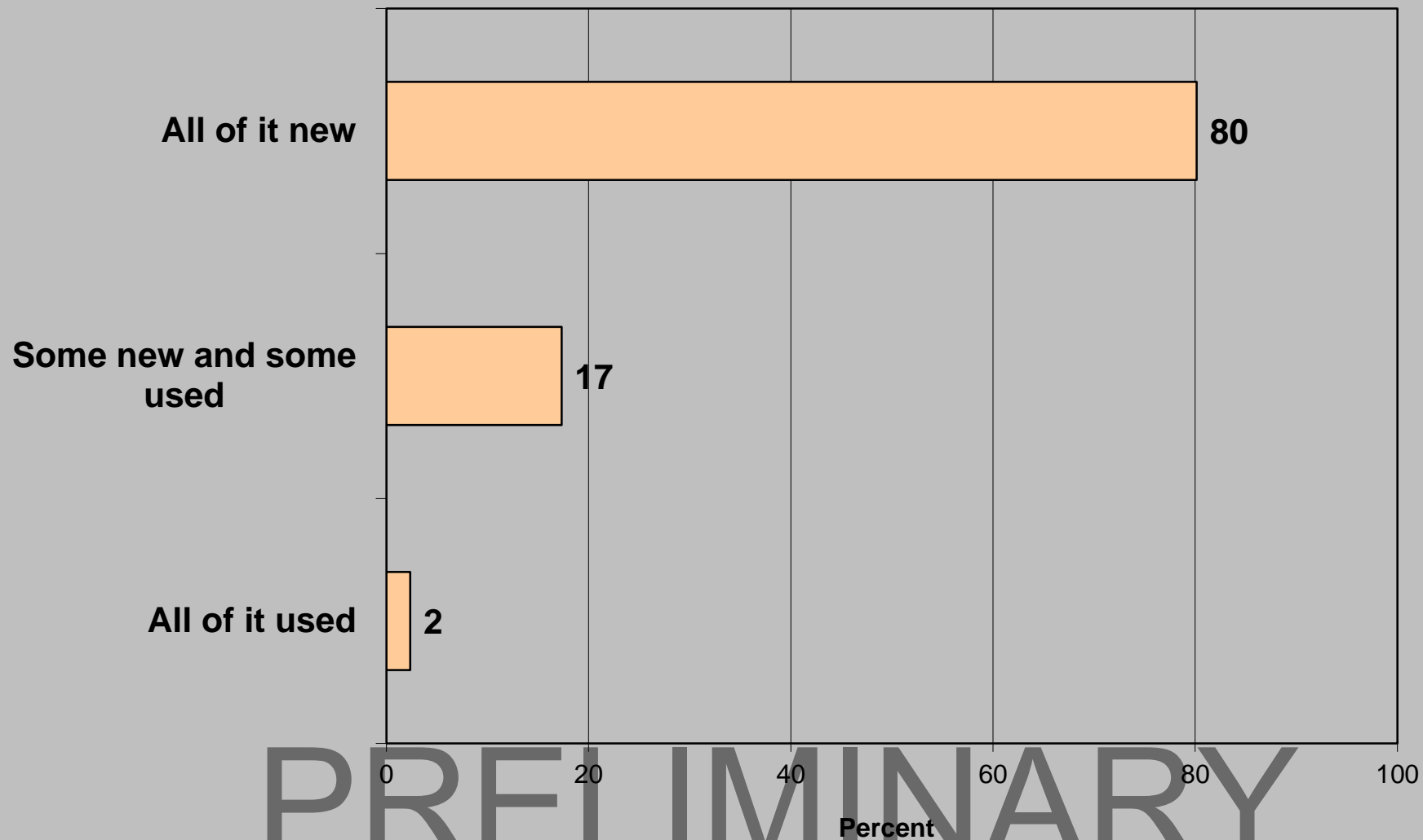
Are people buying new or used gear?

Where are they buying it?

What factors influence their purchasing decisions?

PRELIMINARY

**For the fishing equipment that you bought in the past 5 years, was all of it new, some of it new and some used, or all of it used?
(Among U.S. residents who bought fishing equipment.)**



PRELIMINARY

**For the NEW fishing equipment that you bought in the past 5 years, was it all purchased in a store, some of it in store, or none of it in a store?
(Among U.S. residents who bought fishing equipment.)**



PRELIMINARY

Top Factors Influencing Purchases Among...

U.S. Residents:

- Recommendations from friends or family
- Ease of using the website
- Customer reviews

Latinos:

- Ease of using the website
- Recommendations from friends or family
- Method of payment on the website
- Help from sales associates

African-Americans:

- Help from sales associates
- Internet other than customer reviews
- Customer reviews

Asian-Americans:

- Customer reviews
- Help from sales associates
- Method of payment on the website

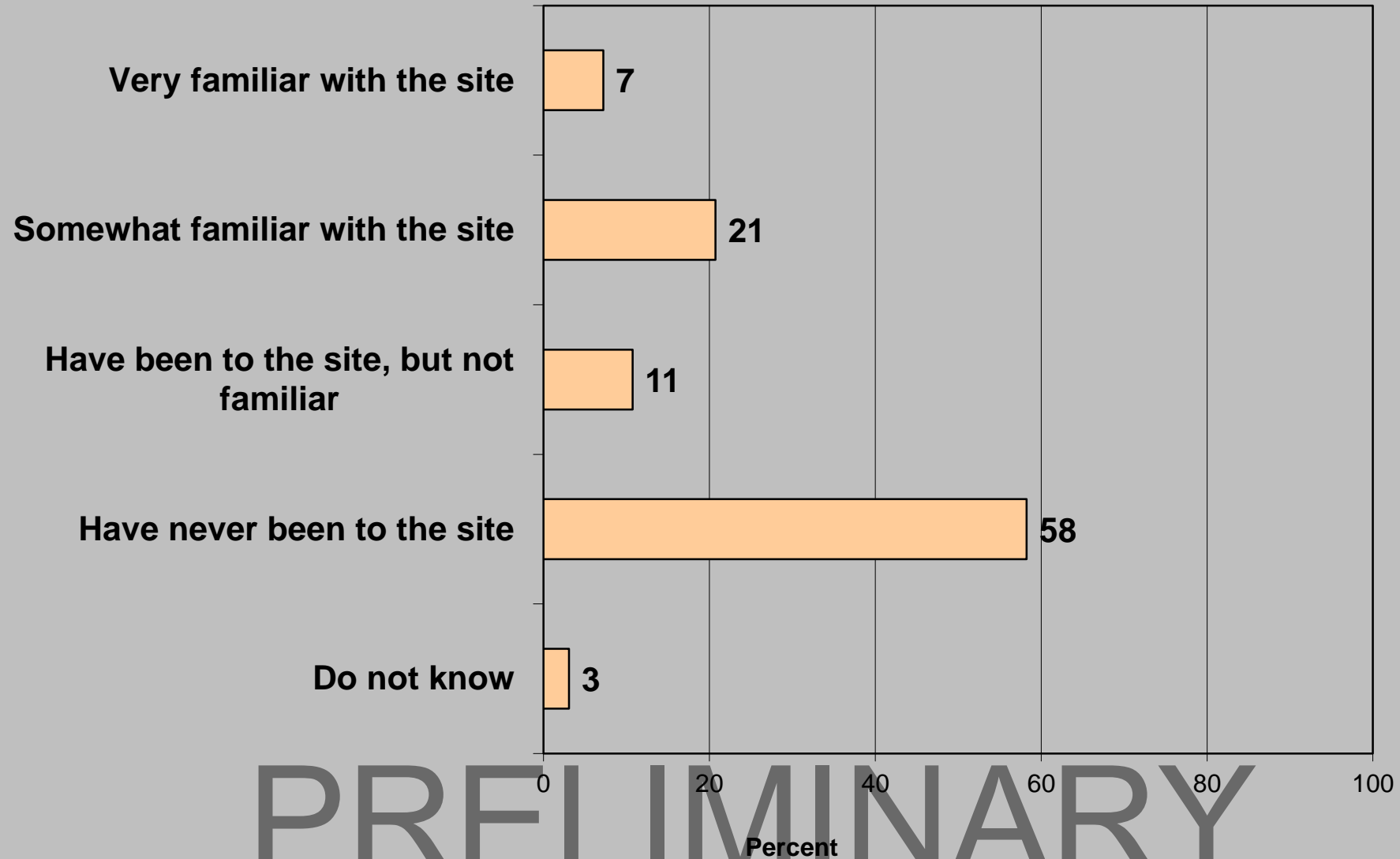


PRELIMINARY

**Are people using state fish
and wildlife agency websites?**

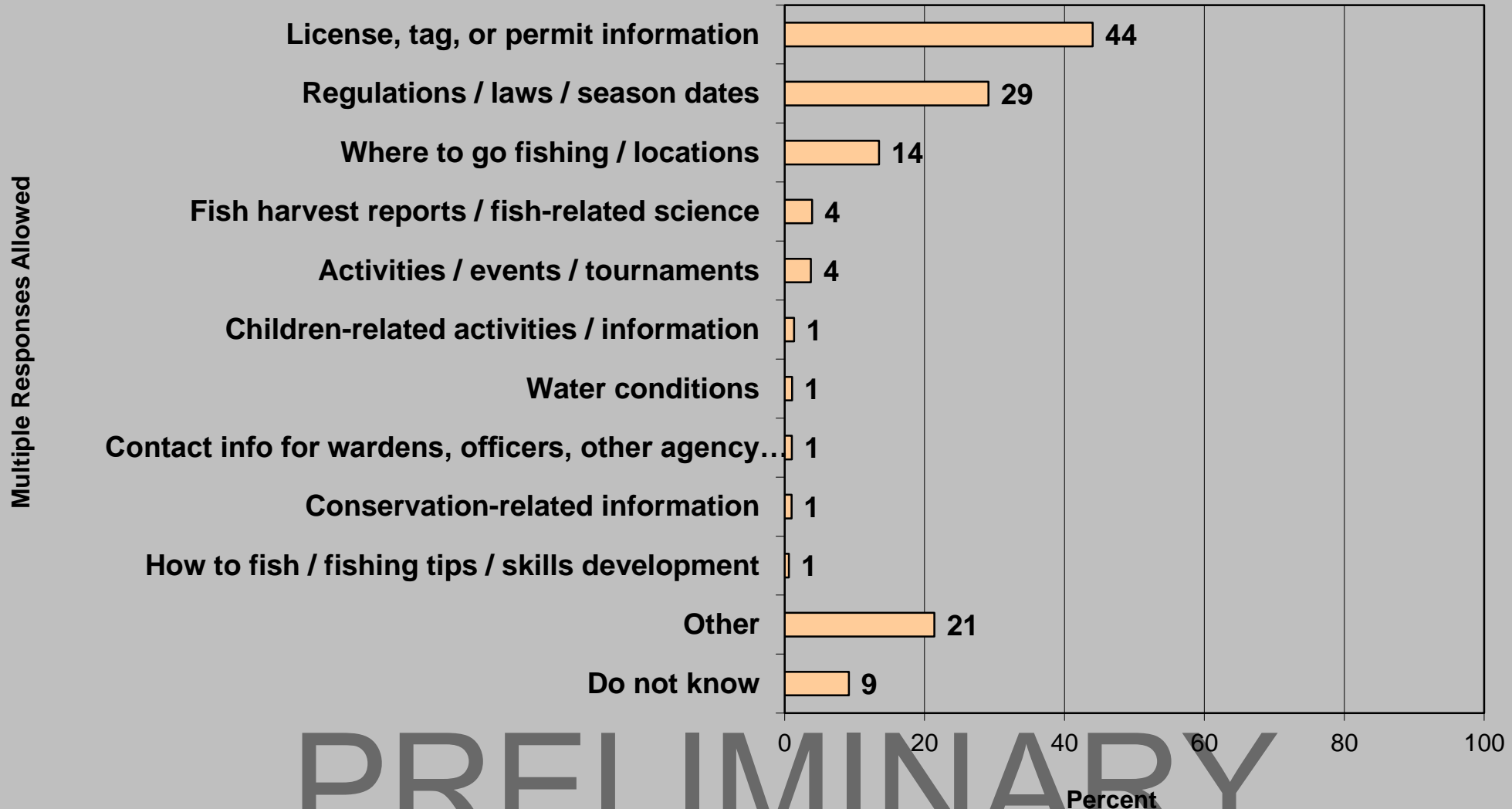
PRELIMINARY

How familiar would you say you are with your state's fish and wildlife agency website? (U.S. residents)



PRELIMINARY

What type of information were you looking for on the agency's website? (Among U.S. residents who visited their state's fish and wildlife agency website.)

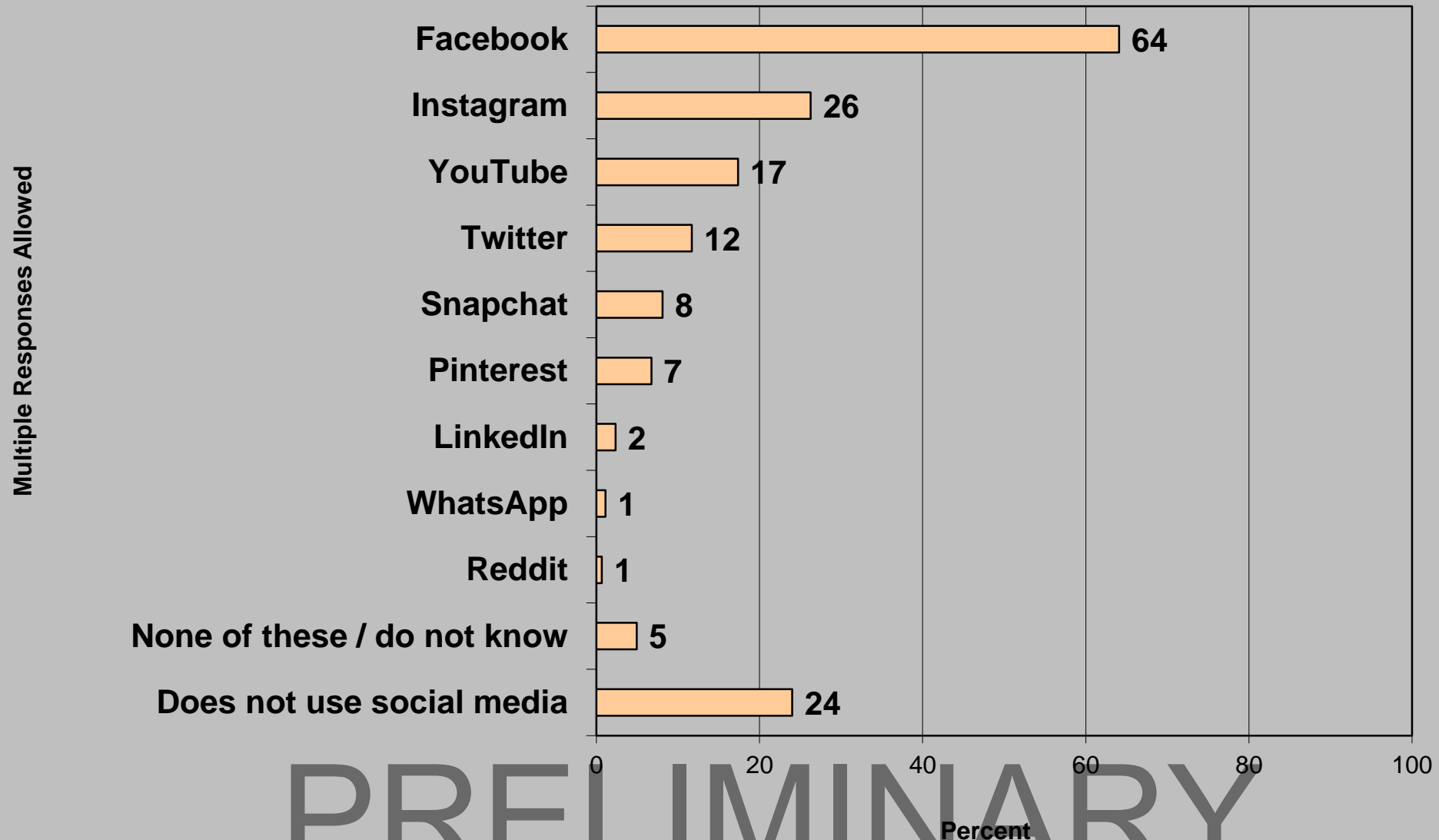


PRELIMINARY

**What are the most popular
social media platforms today?**

PRELIMINARY

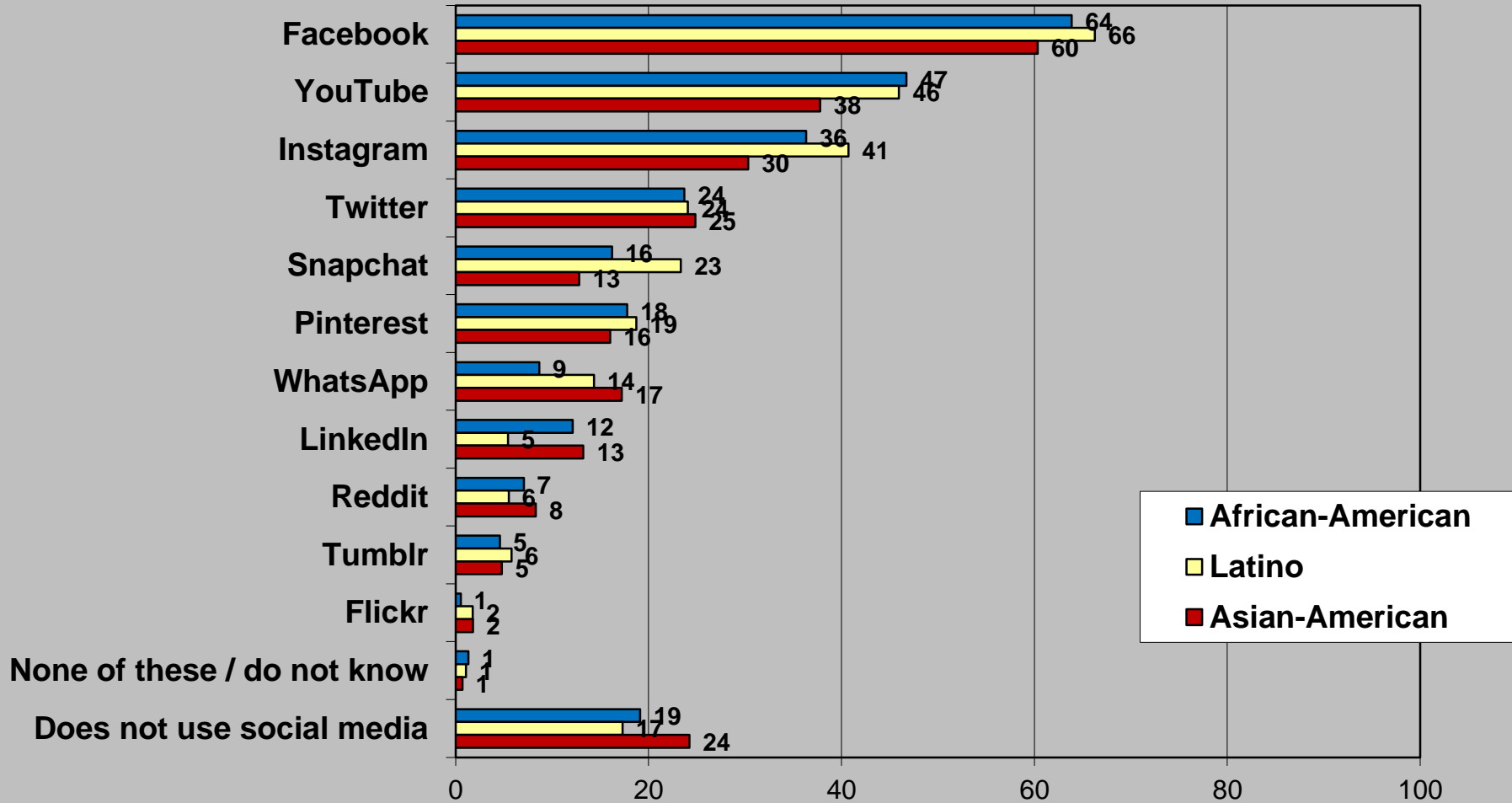
Which social media do you use? (U.S. residents)



PRELIMINARY

Which social media do you use?

Multiple Responses Allowed



PRELIMINARY

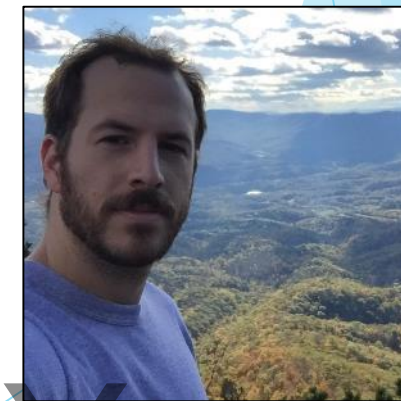
Percent

Next Steps

PRELIMINARY

Next Steps

- **Focus groups to explore survey findings in depth and collect additional data**
- **Six focus groups with American adults to be conducted throughout the AFWA regions**
- **Four focus groups with agency R3 specialists**
 - ✓ **Responsive Management staff to listen in and review notes from this afternoon's group huddle discussions**
 - ✓ **Discussions and results from the huddles will help RM develop the agency discussion guide**
 - ✓ **Focus groups with R3 specialists will build on many of the topics discussed this afternoon**



Tom Beppler, Senior Research Associate, Responsive Management

PRELIMINARY

A silhouette of a person wearing a cap and sunglasses, standing in a boat and reeling in a fishing rod. The rod is curved, indicating a catch. The background is a sunset over a body of water with a forested shoreline in the distance. The sky is filled with soft, golden light and scattered clouds.

Questions?
mark@responsivemanagement.com

PRELIMINARY