Determining Actionable Strategies for Angler R3

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PRELIMINARY
Special Thanks To

Frank Peterson, Jr.  Stephanie Hussey  Dave Chanda  Joanne Martonik
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
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

PRELIMINARY
<table>
<thead>
<tr>
<th>Project Title</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>North Carolina Landowners’ Attitudes Toward Trout Fishing Access</td>
<td>✓</td>
</tr>
<tr>
<td>New Jersey Trout Anglers’ Opinions on Stocking and Other Trout Regulations</td>
<td>✓</td>
</tr>
<tr>
<td>Resident Participation in Freshwater and Saltwater Sport Fishing in Georgia</td>
<td>✓</td>
</tr>
<tr>
<td>Washington Angler Survey Report</td>
<td>✓</td>
</tr>
<tr>
<td>Survey of South Carolina Licensed Recreational Marine Anglers</td>
<td>✓</td>
</tr>
<tr>
<td>New Hampshire Licensed Anglers’ Participation in and Satisfaction With Fishing</td>
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</tr>
<tr>
<td>Enhancing Fishing Access Through a National Assessment of Recreational Boating Access</td>
<td>✓</td>
</tr>
<tr>
<td>Red Snapper Anglers’ Opinions on the Red Snapper Fishery and Fishing Regulations in the Gulf of Mexico</td>
<td>✓</td>
</tr>
<tr>
<td>Understanding First-Time Fishing License Buyers</td>
<td>✓</td>
</tr>
<tr>
<td>Freshwater and Saltwater Fishing Participation Among Alabama Residents</td>
<td>✓</td>
</tr>
</tbody>
</table>
Other Examples of Responsive Management’s Angler Research
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
• 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
A New Angle
The Recreational Boating and Fishing Foundation aims to red in more anglers. Will the lure of the simpler pleasures hook them?

It's no surprise images of sleek Tins of Andy and Opie ambling down to the pond, and of state. Midwest farmers finding their retire- ment in a lazy drifting boat. It is one of those sepia-toned, den-appointed parodies 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, multimillion-dollar 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, tech-centric populace?

The “Water Works Wonder” 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, fear-inducing campaign, its peaceful scenario and lyrical copy a welcome oasis in cluttered adscape of noisy product pitches. This is not mere happenstance. The RBFF, which did not respond to interview requests, took up its change 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 31.2 million between 1991 and 1999, according to the Department of the Interne. While not a precipitous decline, it is ominous when compared with consistent growth in fishable population through the 1980s.

In its own series of regional telephone surveys conducted by Responsi- ve 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 fish fishing. Of those, 60 percent cited other commitments as the locus of the time constraint; 77 percent cited those already fishered before, the point of dis- manage almost intrinsically the lure of fishing. That is, amid our hectic schedules, we are primed for a much-needed respite, if only we can find the time and money.

To further research support and reverse perception of fishing as disconnected from our occupational lives in favor of reconnection with the private. According to Responsive Management's director, Amy U. Ellis, 25 percent of those surveyed aged 1999 cited relaxation as the main reason for fishing and 35 percent of those aged 20-39 cited relaxation again, or “...because more fishing will be sooner than later.”

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

(NON-ANGLERS)

Fishing lecture
Fishing spot with all gear provided
Invitation from a friend
One-stop equipment/license purchase
Offered as part of vacation
Borrow fishing gear free
Amateur fishing tournament with many prizes
Fishing clinic
(Percent (n=1524)
(Data weighted by regions for angler/non-angler nationwide representation)

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

(ANGLERS)

Fishing lecture
Fishing spot with all gear provided
Invitation from a friend
One-stop equipment/license purchase
Offered as part of vacation
Borrow fishing gear free
Amateur fishing tournament with many prizes
Fishing clinic
(Percent (n=1591)
(Data weighted by regions for angler/non-angler nationwide representation)
National Fishing Trends
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
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
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
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)
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
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
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
Major Findings

PRELIMINARY
How interested are Americans in fishing in the next 5 years?
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)

54% of U.S. residents are very or somewhat interested

- Very interested: 35%
- Somewhat interested: 19%
- A little interested: 14%
- Not at all interested: 31%
Are you very interested, somewhat interested, a little interested, or not at all interested in going recreational fishing in the next 5 years?

- **Very interested**: 50% of African-Americans, 51% of Latinos, 44% of Asian-Americans are very or somewhat interested.

- **Somewhat interested**: 29 African-Americans, 26 Latinos, 22 Asian-Americans.


- **Not at all interested**: 26 African-Americans, 21 Latinos, 27 Asian-Americans.

- **Do not know**: 5 African-Americans, 7 Latinos, 7 Asian-Americans.
What percentages of African-Americans, Latinos, and Asian-Americans have fished in the past 5 years?
Percent who have gone recreational fishing in the past 5 years:

- African-American: 19%
- Latino: 22%
- Asian-American: 19%

p < .05
Responsive Management Report

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 1%, in person, by 21%, by mail and interstate by 16%, and its combination licenses by 24%. Overall, WDFW 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.

In 2009, Responsive Management partnered with WDFW and established a long-term goal of increasing freshwater 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 facing the WDFW Fish Program.

Out of the brief requirements to create a marketing plan, Responsive Management conducted various marketing workshops with WDFW personnel, reviewed research, and suggested strategies for increasing freshwater fishing participation and revenue. WDFW’s Island Festival Program during this plan, Responsive Management conducted various marketing workshops with WDFW personnel.

One of the key goals of the plan was to better understand how to market fishing to the market and assess what is happening in the state. The plan also incorporated research examining the impact of changes in license sales 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 John Olson of Rule 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 Island Festival Program. Through this plan, Responsive Management conducted various marketing workshops with WDFW personnel.

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.

Cara Donley, WDFW inland fish program manager, described some of the steps the agency took following the marketing research: “To put it in context, our license sales were down in 2009 and 2010. We implemented some changes last year on our angler data and was able to go through the marketing plan that Responsive Management developed targeting specific audiences: urban, suburban, rural, and human. There were a number of different promotions with the Department of Fish and numerous folks over the years and we decided to focus on our traditional turbid markets instead of just the entire state’s market.”

(Continued on page 6)
How does fishing participation as a child compare with fishing participation as an adult?
Did you ever go fishing as a child? And what about as an adult? (U.S. residents)

- Fishing as a child and as an adult: 63%
- Fishing only as a child: 20%
- Fishing only as an adult: 6%
- Never went fishing: 11%

83% of U.S. residents fished as a child.
Did you ever go fishing as a child? And what about as an adult?

- **Fishing as a child and as an adult**
  - 60% of African-Americans
  - 53% of Latinos
  - 52% of Asian-Americans
  - fished as a child

- **Fishing only as a child**
  - 20% of African-Americans
  - 16% of Latinos
  - 18% of Asian-Americans

- **Fishing only as an adult**
  - 10% of African-Americans
  - 14% of Latinos
  - 13% of Asian-Americans

- **Never went fishing**
  - 21% of African-Americans
  - 25% of Latinos
  - 28% of Asian-Americans

- **Do not know**
  - 8% of African-Americans
  - 7% of Latinos
  - 8% of Asian-Americans
What types of fishing are Americans doing most?
When you fish, which of the following types do you do? (Among U.S. residents who fished in the past 5 years.)

<table>
<thead>
<tr>
<th>Fishing Type</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fishing in freshwater</td>
<td>91</td>
</tr>
<tr>
<td>Fishing in lakes</td>
<td>78</td>
</tr>
<tr>
<td>Fishing from a shore or bank</td>
<td>73</td>
</tr>
<tr>
<td>Fishing from any type of boat</td>
<td>67</td>
</tr>
<tr>
<td>Fishing in streams or rivers</td>
<td>59</td>
</tr>
<tr>
<td>Fishing from a pier or dock</td>
<td>55</td>
</tr>
<tr>
<td>Fishing in ponds</td>
<td>55</td>
</tr>
<tr>
<td>Fishing in saltwater</td>
<td>37</td>
</tr>
<tr>
<td>Fishing in bays and tidal waters</td>
<td>27</td>
</tr>
<tr>
<td>Fishing in the ocean surf</td>
<td>25</td>
</tr>
<tr>
<td>Ice fishing</td>
<td>14</td>
</tr>
</tbody>
</table>
What does a typical fishing trip look like?
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.)

- As part of other activities: 26%
- Just to fish: 64%
- Cannot say / both equally: 11%
How long does it take to get to your typical fishing spots? (Among U.S. residents who fished in the past 5 years.)

- Less than a half-hour: 41%
- About a half hour / 30 minutes: 17%
- About 45 minutes: 10%
- About an hour: 15%
- More than an hour, up to 2 hours: 7%
- More than 2 hours: 7%
- Do not know: 2%

83% of anglers fish within an hour of home.

Fishing is a local activity.
What aspects of fishing are people most knowledgeable about?
Percent of those who have ever fished who indicated being very knowledgeable or somewhat knowledgeable about each of the following:

- How to hook a fish on the line: 72% U.S. residents, 60% Latinos
- How to tie a knot on the fishing line: 65% U.S. residents, 51% Latinos
- How to put together a rod and reel: 63% U.S. residents, 49% Latinos
- Where to fish: 62% U.S. residents, 47% Latinos
- License requirements: 59% U.S. residents, 43% Latinos
- Fishable species in your area: 54% U.S. residents, 31% Latinos
- Fish identification: 53% U.S. residents, 38% Latinos
- How to select fishing equipment: 50% U.S. residents, 39% Latinos
- How to select the best bait: 47% U.S. residents, 44% Latinos
- Fishing groups that are active in your area: 17% U.S. residents, 33% Latinos
How common is mentoring when it comes to fishing?
Have you ever taught anybody to fish? (Among those who have fished in the past 5 years.)

- U.S. residents: 70%
- African-American: 53%
- Latino: 57%
- Asian-American: 57%
Has anybody ever taught or tried to teach you how to fish?

<table>
<thead>
<tr>
<th></th>
<th>U.S. residents</th>
<th>African-American</th>
<th>Latino</th>
<th>Asian-American</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>80</td>
<td>57</td>
<td>47</td>
<td>45</td>
</tr>
</tbody>
</table>

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

- Father: 59%
- Grandfather: 15%
- Friend: 12%
- Spouse / wife / husband / boyfriend / girlfriend: 10%
- Uncle: 9%
- Brother: 5%
- Mother: 5%
- Grandmother: 2%
- Other family not otherwise listed: 2%
- Scout leader / Scoutmaster: 1%
- Sister: 1%
- Other: 5%
- Don't know: 1%

Multiple Responses Allowed

Who taught you to fish? (Among those who indicated that someone taught them to fish.)

- African-American: 37%
- Latino: 29%
- Asian-American: 27%

Percent
How common is self-instruction when it comes to fishing?
Did you ever learn or try to learn any fishing techniques through online videos? (U.S. residents)

- Yes: 15%
- No: 82%
- Don’t know: 3%

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

- Yes: 19%
- No: 78%
- Don’t know: 3%
What are the most important motivations for going fishing?
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)

<table>
<thead>
<tr>
<th>Reason</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>To be out in nature or outdoors</td>
<td>78</td>
</tr>
<tr>
<td>To relax</td>
<td>72</td>
</tr>
<tr>
<td>To be with family</td>
<td>71</td>
</tr>
<tr>
<td>To be with friends</td>
<td>64</td>
</tr>
<tr>
<td>For the scenery</td>
<td>56</td>
</tr>
<tr>
<td>To disconnect from technology</td>
<td>53</td>
</tr>
<tr>
<td>Somebody asked you to go</td>
<td>49</td>
</tr>
<tr>
<td>It was part of a general outdoor outing</td>
<td>42</td>
</tr>
<tr>
<td>Because there was a place close by</td>
<td>41</td>
</tr>
<tr>
<td>For the solitude</td>
<td>41</td>
</tr>
<tr>
<td>To teach someone else to fish</td>
<td>37</td>
</tr>
<tr>
<td>You were on vacation</td>
<td>29</td>
</tr>
<tr>
<td>For the challenge</td>
<td>26</td>
</tr>
<tr>
<td>To get fish to eat</td>
<td>26</td>
</tr>
<tr>
<td>To get away from family</td>
<td>16</td>
</tr>
<tr>
<td>To get a trophy fish</td>
<td>7</td>
</tr>
</tbody>
</table>
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
What are the most important things taking away from anglers’ enjoyment of fishing?
### Fishing dissatisfactions among those who fished in the past 5 years: (U.S. residents)

<table>
<thead>
<tr>
<th>Issue</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Finding places that are not crowded</td>
<td>48</td>
</tr>
<tr>
<td>Getting time off from work / family obligations</td>
<td>47</td>
</tr>
<tr>
<td>Mosquitos and other pests</td>
<td>45</td>
</tr>
<tr>
<td>Seeing litter</td>
<td>44</td>
</tr>
<tr>
<td>Scheduling time with fishing companions</td>
<td>42</td>
</tr>
<tr>
<td>Water quality issues</td>
<td>36</td>
</tr>
<tr>
<td>Lack of fish or not catching fish</td>
<td>35</td>
</tr>
<tr>
<td>Getting access to the water</td>
<td>30</td>
</tr>
<tr>
<td>Cost of travel or equipment</td>
<td>29</td>
</tr>
<tr>
<td>Poor behavior of other people</td>
<td>28</td>
</tr>
<tr>
<td>Travel time to get to the fishing spots</td>
<td>27</td>
</tr>
<tr>
<td>Fish advisories</td>
<td>26</td>
</tr>
<tr>
<td>Nobody to go with</td>
<td>25</td>
</tr>
<tr>
<td>Health problems</td>
<td>21</td>
</tr>
<tr>
<td>Finding shade at the fishing spots</td>
<td>21</td>
</tr>
<tr>
<td>Boat-related problems</td>
<td>19</td>
</tr>
<tr>
<td>The cost of licenses and permits</td>
<td>17</td>
</tr>
<tr>
<td>Security of your parked vehicle</td>
<td>15</td>
</tr>
<tr>
<td>Not being confident in your skill level</td>
<td>15</td>
</tr>
<tr>
<td>Parking to get to the fishing spots</td>
<td>13</td>
</tr>
</tbody>
</table>
Top Dissatisfactions Among…

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

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

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

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
Is it possible that some anglers have *never* purchased a fishing license?
Have you ever purchased a fishing license? (Among U.S. residents who fished in the past 5 years.)

- Yes: 83%
- No: 17%
Have you ever purchased a fishing license? (Among those who have fished in the past 5 years.)

- Yes
  - African-American: 55%
  - Latino: 64%
  - Asian-American: 58%

- No
  - African-American: 41%
  - Latino: 35%
  - Asian-American: 41%
How are anglers purchasing their licenses?

How do they prefer to purchase their licenses?
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.)

- Yes: 30%
- No: 69%
- Don't know: 1%
Where did you purchase your most recent fishing license? 
(Among U.S. residents who fished in the past 5 years.)

- Sporting goods store / bait store: 62%
- Online / agency website: 27%
- Agency office: 8%
- Charter boat service: 1%

*“Don’t know” responses not shown*
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.)

Prefer online: 34%

Prefer in store: 58%

Neither / no preference / don't know: 8%

Top reasons for preferring online:
- Faster
- Easier

Top reasons for preferring in store:
- Like to have a hard copy
- In store getting other things anyway
- Easier
- Greater confidence in getting the right license
- Faster
Which technologies are anglers most likely to use to renew their licenses or get information on fishing?
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: 34%
- An app on your phone: 25%
- A phone text reminder that included a link that took you directly to your state's license purchase site: 17%
- An auto renewal service where a credit card on file is automatically charged for your yearly license fee: 10%
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.
Are people seeing and hearing much about recreational fishing?  

Where are they seeing and hearing it?
Did you hear or see anything about recreational fishing in the past 5 years?

- All U.S. residents: 51
- African-American: 24
- Latino: 25
- Asian-American: 23
Please tell me if you saw or heard anything about recreational fishing from the following in the past 5 years. (U.S. residents)

- Friends, family, or other personal acquaintances: 33%
- News and entertainment media: 26%
- Magazines or newspapers, including their websites: 24%
- Retailers: 21%
- Social media, such as Facebook: 20%
- Government agencies: 15%
- Conservation non-profits or sporting organizations: 14%
- Guides or charter services: 12%
- None of these: 3%
- Did not hear or see anything about recreational fishing: 49%

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

- Social media, such as Facebook
- News and entertainment media
- Friends, family, or other personal acquaintances
- Retailers
- Magazines or newspapers, including their websites
- Government agencies
- Guides or charter services
- Conservation non-profits or sporting organizations
- None of these

Did not hear or see anything about recreational fishing

Percent

Multiple Responses Allowed
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
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
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.)

- All of it new: 80%
- Some new and some used: 17%
- All of it used: 2%
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.)

- All of it in a store: 72%
- Some of it in a store: 26%
- None of it in a store: 1%
Top Factors Influencing Purchases Among...

U.S. Residents:
- Recommendations from friends or family
- Ease of using the website
- Customer reviews

African-Americans:
- Help from sales associates
- Internet other than customer reviews
- Customer reviews

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

Asian-Americans:
- Customer reviews
- Help from sales associates
- Method of payment on the website
Are people using state fish and wildlife agency websites?
How familiar would you say you are with your state's fish and wildlife agency website? (U.S. residents)

- Very familiar with the site: 7%
- Somewhat familiar with the site: 21%
- Have been to the site, but not familiar: 11%
- Have never been to the site: 58%
- Do not know: 3%
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.)

- License, tag, or permit information: 44%
- Regulations / laws / season dates: 29%
- Where to go fishing / locations: 14%
- Fish harvest reports / fish-related science: 4%
- Activities / events / tournaments: 4%
- Children-related activities / information: 1%
- Water conditions: 1%
- Contact info for wardens, officers, other agency...: 1%
- Conservation-related information: 1%
- How to fish / fishing tips / skills development: 1%
- Other: 21%
- Do not know: 9%
What are the most popular social media platforms today?
Next Steps
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

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