



RBFF/CAHSS Conservation Study

December 2015



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Map of regions

Background

The RBFF and CAHSS boards represent a diverse set of organizations and constituencies including state departments of natural resources, manufacturers, media, and conservation organizations. Within this community of stakeholders, there's a strong belief that hunting and fishing enthusiasts are some of the most ardent supporters of conservation, and that in order to drive growth in license sales, it's critical to build awareness among anglers and shooters of the linkage between licenses and conservation. This approach doesn't necessarily reflect extant data on the subject, and such a strategy is subject to perennial debate.

Previous research indicates that respondents buy licenses because "it's the right thing to do." The contribution to conservation enabled by these license purchases helps to reinforce the initial purchase decision, but alone does not serve as a primary impetus. In other words, people are buying licenses because they want to get outdoors—learning that money is going back into local conservation efforts is a feel-good bonus.

However, none of the research to date truly examines the linkage between conservation and license purchase in detail. RBFF and CAHSS would like to gain clearer and more concrete data on respondent motivations.

An in-depth examination of the issue will provide us with the necessary information to confidently move forward with clear direction for both brands and their communication strategies.

Objectives

01

Benchmark current awareness of the connection between licenses and local conservation.

- How many respondents know where license proceeds are going?
- How does this change among our target audiences?
- How do our target audiences compare to both general population and avid segment?

02

Develop a better understanding of the relative importance of conservation messaging to our primary target audiences.

- To what degree is this group motivated by this message?
- How does that motivation vary among our target audiences?
- How does that motivation compare to both the general population and avid segment?

03

Ascertain to what degree being motivated by conservation correlates with actual license purchase.

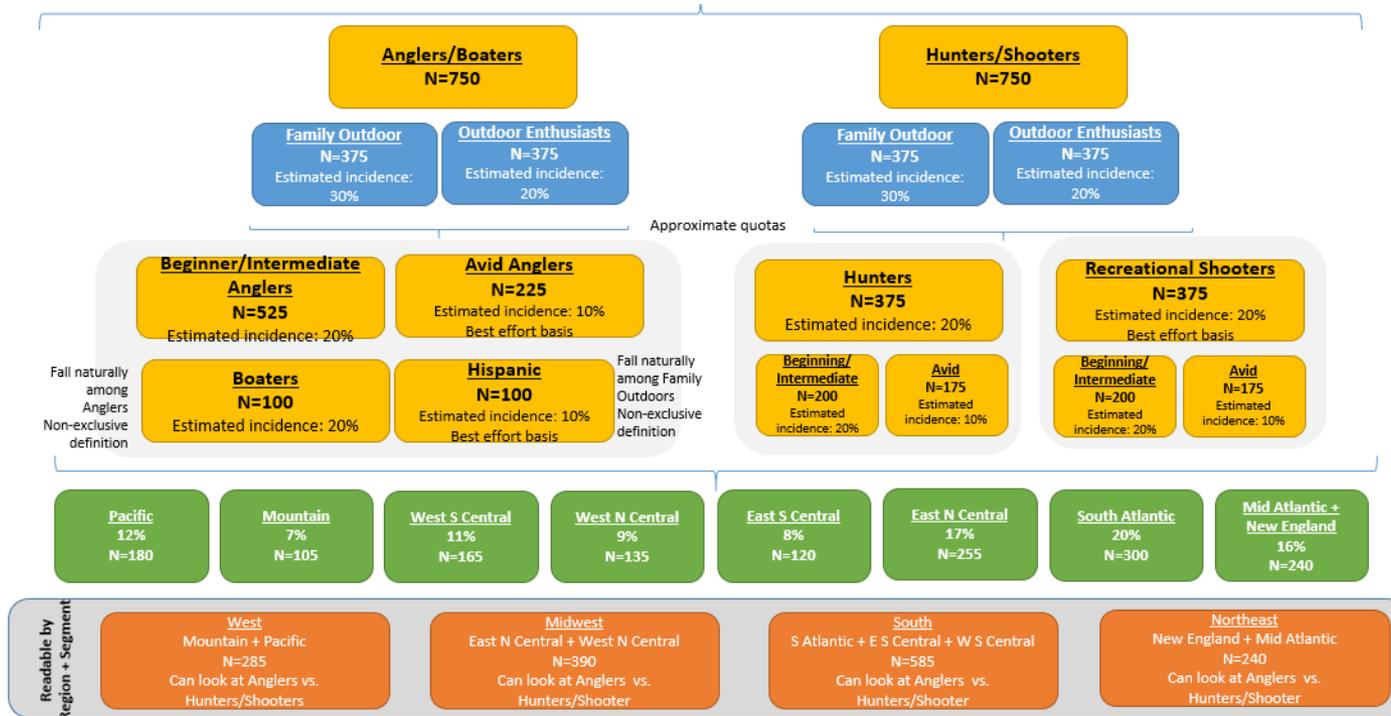
04

Gain insight into what type of conservation messages are most relevant and motivating to our audience(s), and where they would be most receptive to these messages.

Methodology & Structure

15 minute online survey, utilizing the following sample structure
N=1540

Fielded: September 29th-October 28th 2015



Refer to slide 85 for full regional map

Respondent Criteria

Family Outdoors



- Aged 18 and up
- Have children under 18 in household (if no children, eliminate from consideration for family outdoors)
- Participate in outdoor activities more than once a year; activities must include fishing or hunting/shooting
- Participate in outdoor activities with children under 18
- Participate in outdoor activities to build relationships with my family

Outdoor Enthusiasts



- Aged 18 and up
- Participate in outdoor activities at least once a month; activities must include fishing or hunting/shooting
- Participate in outdoor activities with spouse/significant other, family members (such as parents, siblings, but not own children), friends, or alone
- Participate in outdoor activities to build expertise in sport/activity AND/OR Enjoy outdoor activities for the experience/excitement AND/OR enjoy outdoor activities to 'get away' or escape

Respondent Criteria, cont.

Anglers



- Beginning/Intermediate Anglers
 - Either Family Outdoors or Outdoor Enthusiasts
 - Fish 1-10x/yr.
- Avid Anglers
 - Outdoor Enthusiast
 - Fish 11+x/year
 - Own fishing equipment and regularly use it when I fish.
- Boaters
 - A subset of Beginning/Intermediate Anglers or Avid Anglers, non-exclusive definition in terms of sample)
 - Participates in boating
 - Currently owns a boat and fishes from a boat (canoe, kayak, rowboat, electric motor, etc.)
- Hispanics
 - A subset of family Outdoors, non-exclusive definition in terms of sample

Hunters/Shooters



- Hunters
 - Beginning/Intermediate Hunters
 - Either Family Outdoors or Outdoor Enthusiasts
 - Hunt 1-4x/yr.
 - Avid Hunters
 - Outdoor Enthusiast
 - Hunt 5+x/year
- Shooters
 - Beginning/Intermediate Shooters
 - Either Family Outdoors or Outdoor Enthusiast
 - Shoot 1-9x/yr.
 - Avid Shooters
 - Outdoor Enthusiast
 - Shoot 10+x/year

Executive Summary: Overall

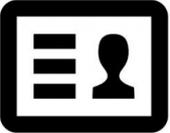
<p>License</p>  <p>Conservation</p>	<p>Overall, approximately three-quarters of respondents are aware of the connection between licensing and conservation on an aided basis (directionally higher among shooters/hunters vs. anglers).</p>
	<p>While nearly all (over 9 out of 10) like the idea that they are funding conservation with their licensing fees, it is not the main driver for why they participate in outdoor activities. They are participating because they appreciate the outdoors and the time they spend in nature.</p>
	<p>Nearly everyone is aware they need a license, and most people hold one. Eight in ten respondents claim they purchased a license because it is a required rule and the “right thing to do.” Conservation is not a main driver of licensing purchase.</p>
	<p>Through a Max Diff prioritization of messaging (see slide 13 for more details), both anglers and hunters/shooters prefer the detailed conservation messaging of:</p> <ul style="list-style-type: none">• 100% of your license fees are invested back into conservation, ensuring healthy fish/wildlife populations and public access to fishing/hunting/shooting opportunities.• 100% of your license fees are invested back to state wildlife agencies to ensure healthy fish/wildlife populations and public access to fishing/hunting/shooting opportunities in your state

Executive Summary: RBFF

<p>License</p>  <p>Conservation</p>	<p>While the majority of anglers correctly understand that their license fees go towards conservation, the following are significantly more aware of the connection: Outdoor Enthusiasts, Avid Anglers and Boaters.</p>
	<p>While nearly all like the idea that they are funding conservation with their licensing fees, it is not the main driver for why they fish or participate in outdoor activities. They are participating because they appreciate the outdoors and the time they spend with their family. Almost all anglers, however, care about healthy fish populations and protecting and preserving the waterways.</p>
	<p>Most anglers know you need a license to fish and have purchased one in the past. However, Outdoor Enthusiasts, Avid Anglers and Boaters are significantly more likely to have purchased a license, especially Annual licenses. In terms of why they purchase licenses, most claim they purchased a license because it is a required law. However, Outdoor Enthusiasts, Avid Anglers and Boaters are all significantly more likely to say because they want to support a sport they are passionate about, as well as because the fees go towards conservation.</p>
	<p>When asked the reasons why they fish, respondents categorized as Family Outdoors and Beginner/Intermediate Anglers are significantly more likely to fish for “family reasons” (spending time with family, family traditions) Outdoor Enthusiasts and Avid Anglers are significantly more likely to fish for reasons other than family (enjoy solitude, catch own food). Boaters have the largest range of reasons (including both family and non-family rationale). And Hispanics while also stating family reasons, also are significantly more likely to say “starting a new hobby.”</p>

See slides 64-71 for more details

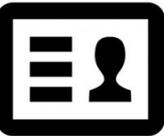
Executive Summary: CAHSS

<p>License</p>  <p>Conservation</p>	<p>While the majority of shooters/hunters correctly understand that their license fees go towards conservation, the following are significantly more aware of the connection: Outdoor Enthusiasts, Avid Shooters and Avid Hunters.</p>
	<p>While nearly all like the idea that they are funding conservation with their licensing fees, it is not the main driver for why they participate in shooting/hunting and outdoor activities. They are participating because they appreciate the outdoors and the adventure and excitement shooting and hunting offers.</p>
	<p>Most hunters/shooters know you need a license and have purchased one in the past. However Hunters are significantly more likely than Shooters to have a license. While conservation is not a main driver of licensing purchase overall, almost half hunters/shooters claim this is one reason to purchase a license. Outdoor Enthusiasts, as well as Avid Hunters, are significantly more likely to purchase a license because they know the fees are invested back into conservation.</p>
	<p>When asked why they shoot or hunt, respondents categorized as Outdoor Enthusiasts, Avid Shooters and Avid hunters are significantly more likely to say a variety of reasons, including “it is a good way to promote conservation” and “keep the tradition alive that was passed down by family.” Avid Shooters and Avid Hunters both participate in more outdoor activities than Beginner/Intermediates and tend to be older, males, who are looking to shoot or hunt for excitement and solitude.</p>

Executive Summary: Regional

<p>License</p>  <p>Conservation</p>	<p>As seen with earlier findings, most respondents are aware that their licensing fees go towards conservation. There are no major differences regionally on this topic.</p>
	<p>Nearly all respondents like the idea that they are funding conservation with their licensing fees. This is particularly true of the Midwest region, and also in the East North Central region.</p>
	<p>While nearly everyone is aware they need a license to fish or hunt, respondents in the Midwest are significantly more likely than any other region to be aware. The Midwest is also significantly more likely to have purchased annual licenses in the past and know they needed a license by general knowledge. Roughly, eight in ten respondents claim they purchased a license because it is a required rule and the “right thing to do.”, with more respondents in the Midwest and South saying this. Conservation is not a main driver of licensing purchase, but the Midwest is the region garnering the highest score, with the West North Central, as well as the East South Central, scoring higher than other regions.</p>

Executive Summary: Implications

<p>License</p>  <p>Conservation</p>	<p>As expertise and commitment to the sport increase, so does knowledge of conservation. If the organizations desire to increase awareness of this connection, it may be necessary to create targeted marketing efforts for those who are new to fishing/hunting/shooting activities.</p>
	<p>A theme across studies and analyses is that while conservation is deemed important, it is not the reason why people participate in fishing or hunting. Their love for the sport, as well as their enjoyment for the outdoors is the driving factor to their participation. In order to increase the relevance of conservation, a stronger connection between conservation and the activities themselves needs to be communicated so that the target audiences can understand the tangible benefits of these efforts.</p>
	<p>Another consistent finding in both studies is how the majority of respondents know they need a license to fish or hunt, but that conservation is not a main driver of purchase. Again, it will be necessary for the target audiences to fully understand the end benefit of conservation in order to elevate that as a main driver of license behavior. Additionally, specialized executions around about licensing would be beneficial for the different segments – as we learned that there are different drivers to participation among the Outdoor Enthusiasts vs. Family Outdoors and Beginners vs. Avids. There are also different demographics for these groups that could also be highlighted in creative executions.</p>
	<p>Across all groups in the study, conservation messaging that outlined how much and where the licensing fees were being used were the most relevant messaging tested. These messages could serve as the foundation for strengthening the connection between licensing and conservation – as they begin to show the end benefit for these efforts.</p>

Understanding Max Diff

MaxDiff is an approach for obtaining preference/importance scores for multiple items (brand preferences, brand images, product features, advertising claims, or in this case membership benefits) using marketing or social survey research.

With MaxDiff, respondents are shown a set (subset) of the possible benefits in the study, and are asked to indicate the benefit they value the most and the benefit they value the least.

MaxDiff scoring uses a sophisticated estimation technique to compute scores for each respondent on each benefit. Hierarchical Bayes (HB) is the statistical technique used. This test utilized n=788 for RBFF and n=752 for CAHSS for overall respondents and tested 8-9 different messages. Respondents viewed three messages at a time over a total of ten screens.

Instead of using a 0 to 100 scale, the MaxDiff data has been transformed into scores on a scale that may be stated as:

$$\text{Index Score} = (0 \text{ to } 100) \times N$$

N = the number of items tested

With this method, scores above 100 are always above average and scores below 100 are always below average.

Indexed scores greater than or equal to 100 represent a benefit that tested at average to exceptional levels. Scores performing under 100 represent benefits that were lower performing.

- *An index of 100 is an average performing benefit*
- *A score above 100 is accepted as better than average performance*
- *A score of 99 or lower is below average*

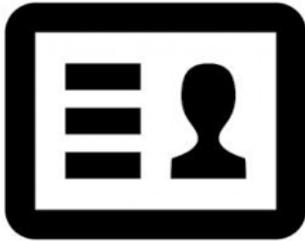


01

RBFF
Detailed
Findings

- + Licensing
- + Conservation
- + Message
Prioritization

Nearly everyone is aware they need a license, and most people hold one.



91% are aware that they need a license to fish or hunt

94% hold a license

- 73% Annual
- 23% Short term
- 7% Lifetime



Where learned about it?

- General knowledge: 61%
- State fish and wildlife agency website: 31%
- Sporting/retail store: 19%
- A friend: 18%
- Other website: 5%

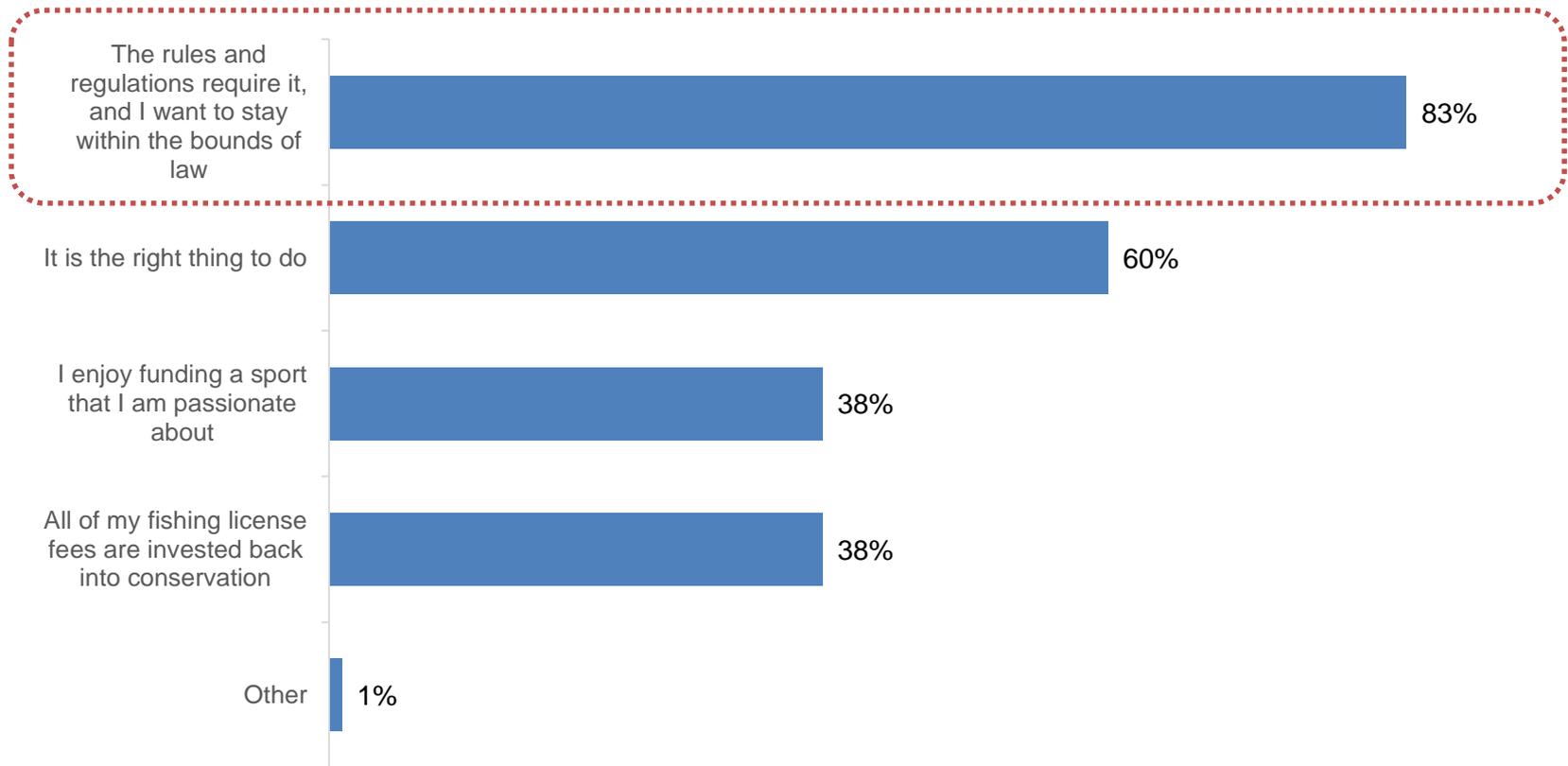


Where purchased?

- Sporting/retail store: 79%
- Online: 22%
- Toll free number: 4%

Over 80% claim they purchased a license because it is a required rule.

Reasons Purchased Fishing License



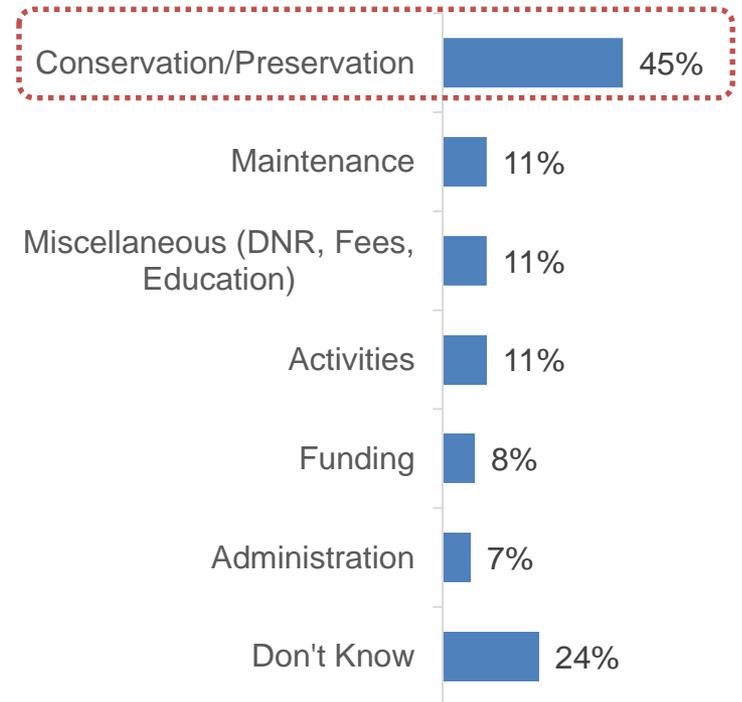
Total equals more than 100%. Multiple responses allowed.

License fees are most commonly thought to go towards conservation.

What do the licensing fees go towards?
(Open End Responses)

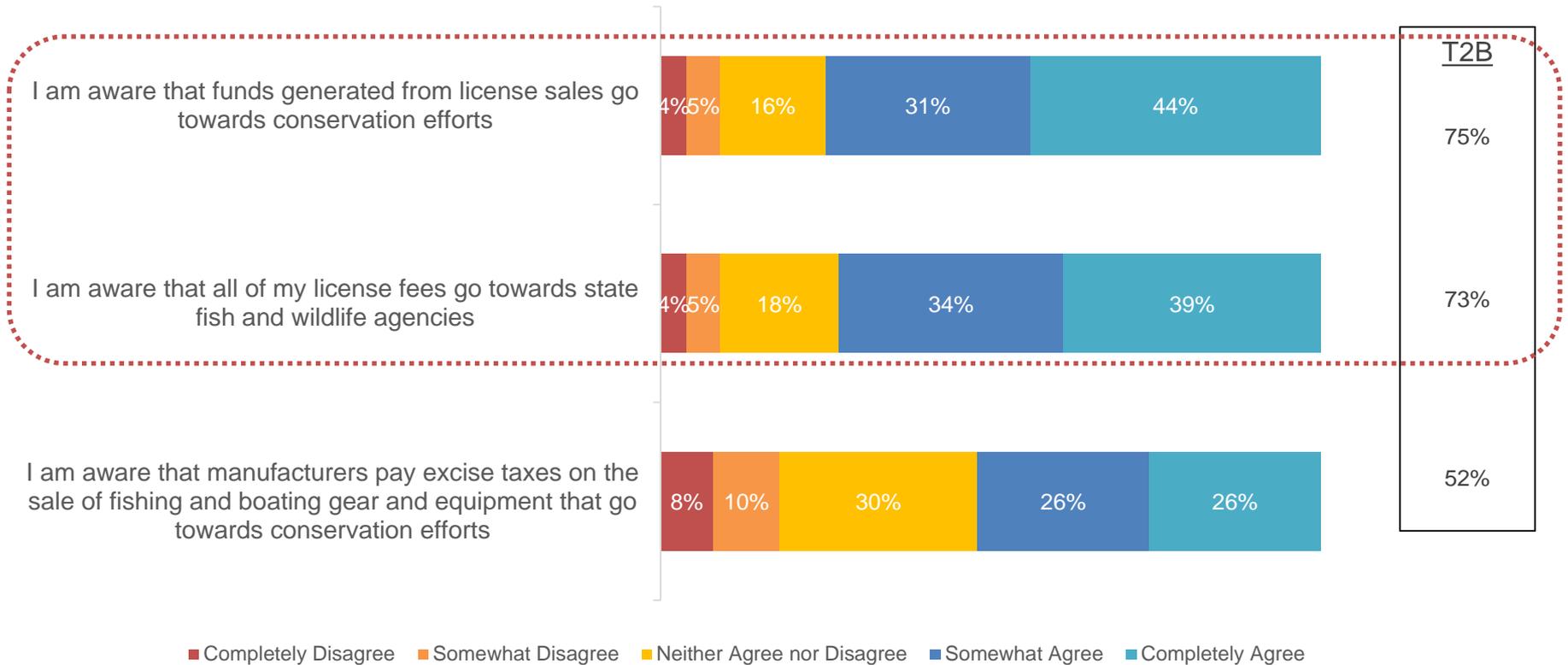


License Fees Used For...



When asked directly, a majority are aware that license funds go towards conservation efforts.

Anglers: Agreement Statements

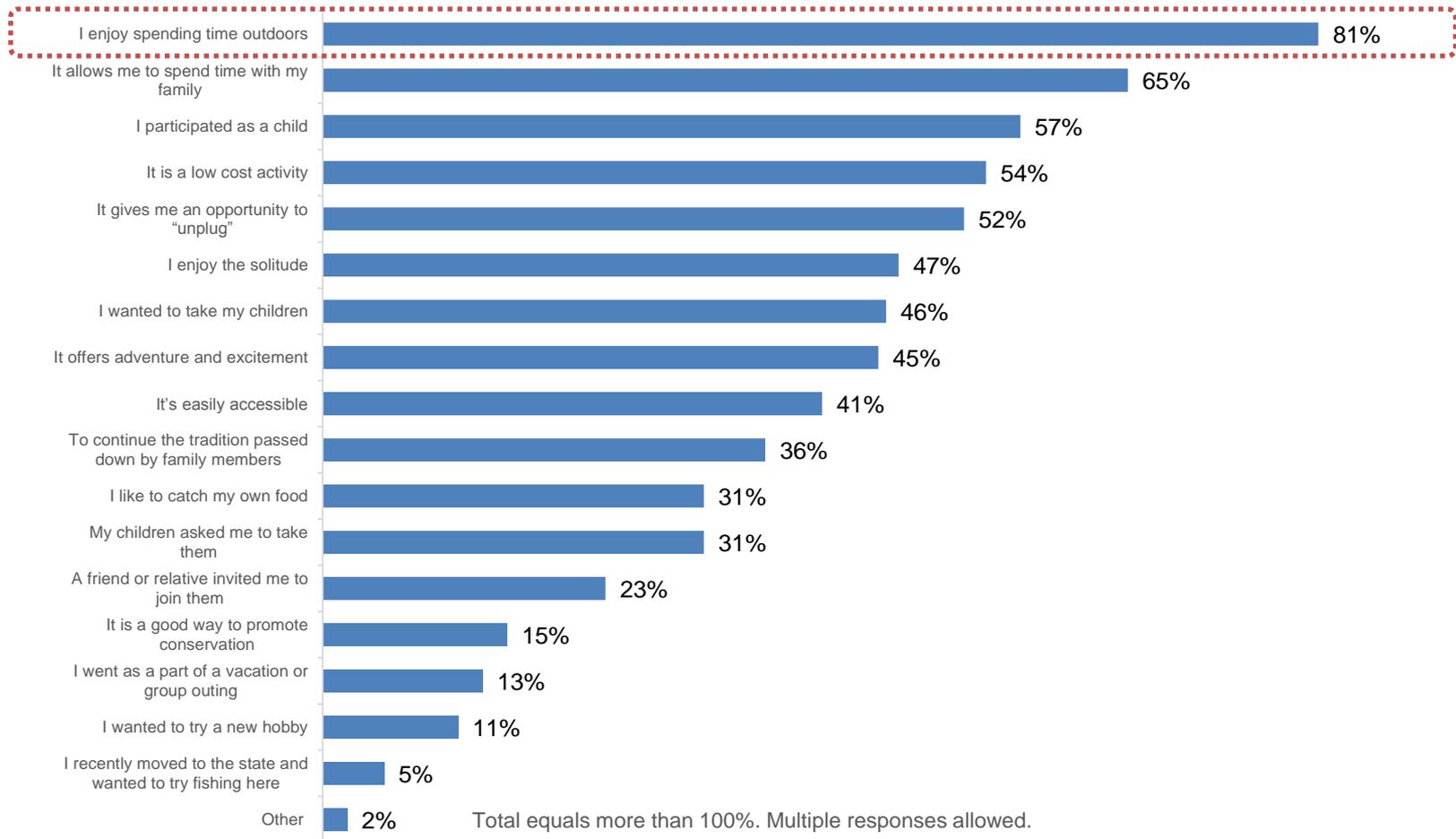


T2B
75%
73%
52%

Q6. Before you go fishing and hunting, you do need a license. Please indicate how much you agree or disagree with each statement.
Base=Total Respondents (n=788)

While there is awareness for conservation, it is not a main driver for why people fish. They are fishing to appreciate the outdoors.

Reasons to Fish



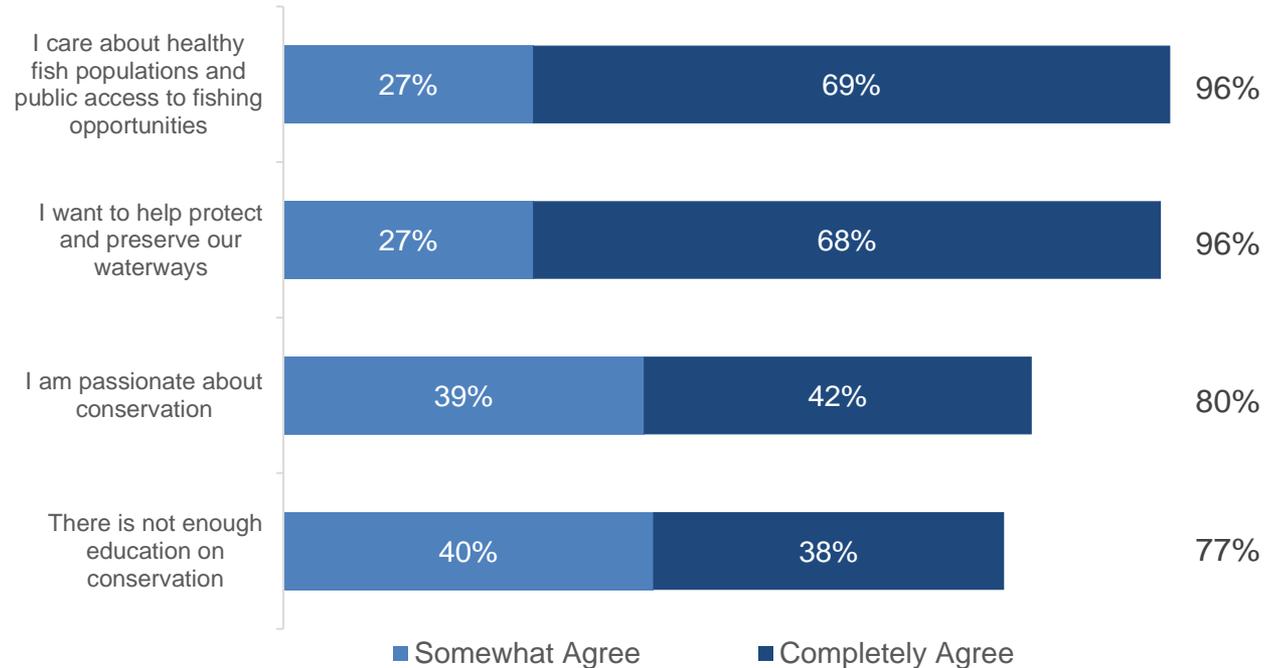
Q1. Which of the following are reasons why you fish?
Base=Total Respondents (n=788)

Nearly all care about healthy fish populations and appreciate that their fees goes towards conservation efforts.



93% like that all their licensing fees goes towards conservation

License Agreement Statements



Q9. When you purchase a fishing license, all the fees go towards conservation. Knowing this, how do you feel about these efforts?
Q10. Please indicate how much you agree or disagree with each of the following statements regarding fishing licenses.
Base=Total Respondents: (n=788)

The highest priority conservation messages detail out that 100% of licensing fees are invested back into ensuring healthy fish populations.

RBFF Max Diff Index Scores



100% of your fishing license fees are invested back to state wildlife agencies to ensure healthy fish populations and public access to fishing opportunities in your state.

100% of your fishing license fees are invested back into conservation, ensuring healthy fish populations and public access to fishing opportunities.

The revenue generated from your fishing license goes toward conserving your local waterways today and for generations to come.

When you purchase a fishing license, equipment, and gear, or register your boat, you directly contribute to conservation efforts.

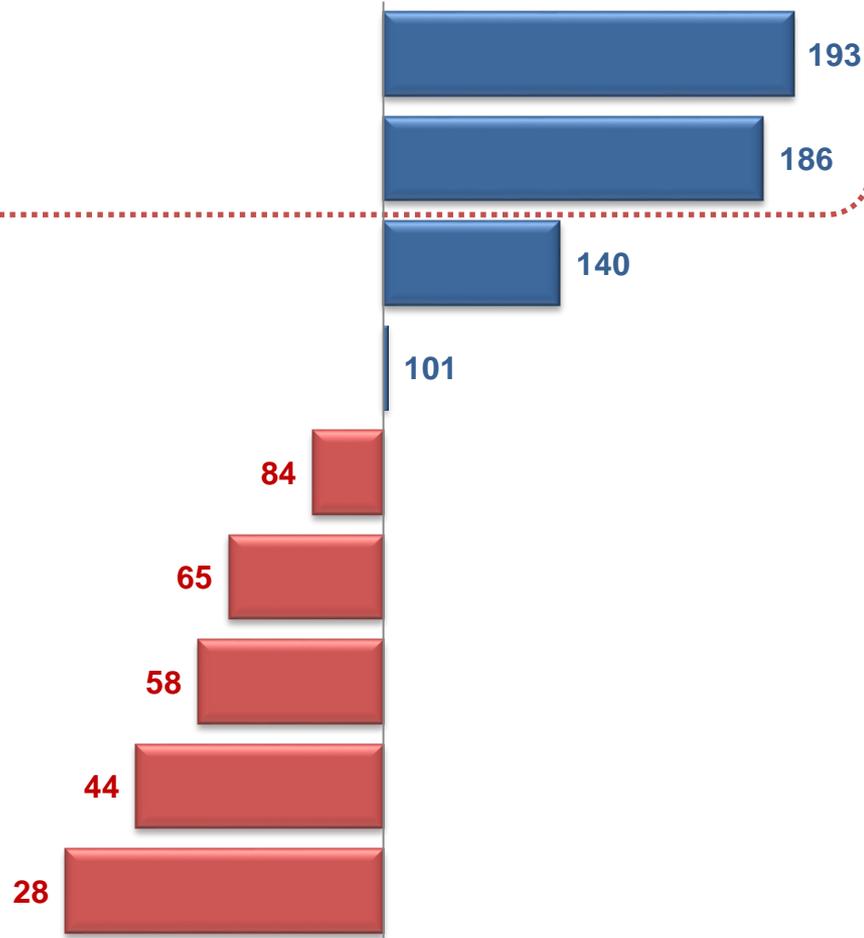
Anglers are a critical part of the natural ecosystem. Participation ensures that waterways remain clean, healthy and accessible.

Your license funds go towards conservation efforts.

Fishing and boating help preserve waterways for the next generation.

Fishing and boating help promote conservation of the outdoors.

Your license funds go to fisheries management.



Which one of the following conservation messages is the most meaningful to you and which conservation message is the least meaningful to you?

Base=Total Respondents (n=788)



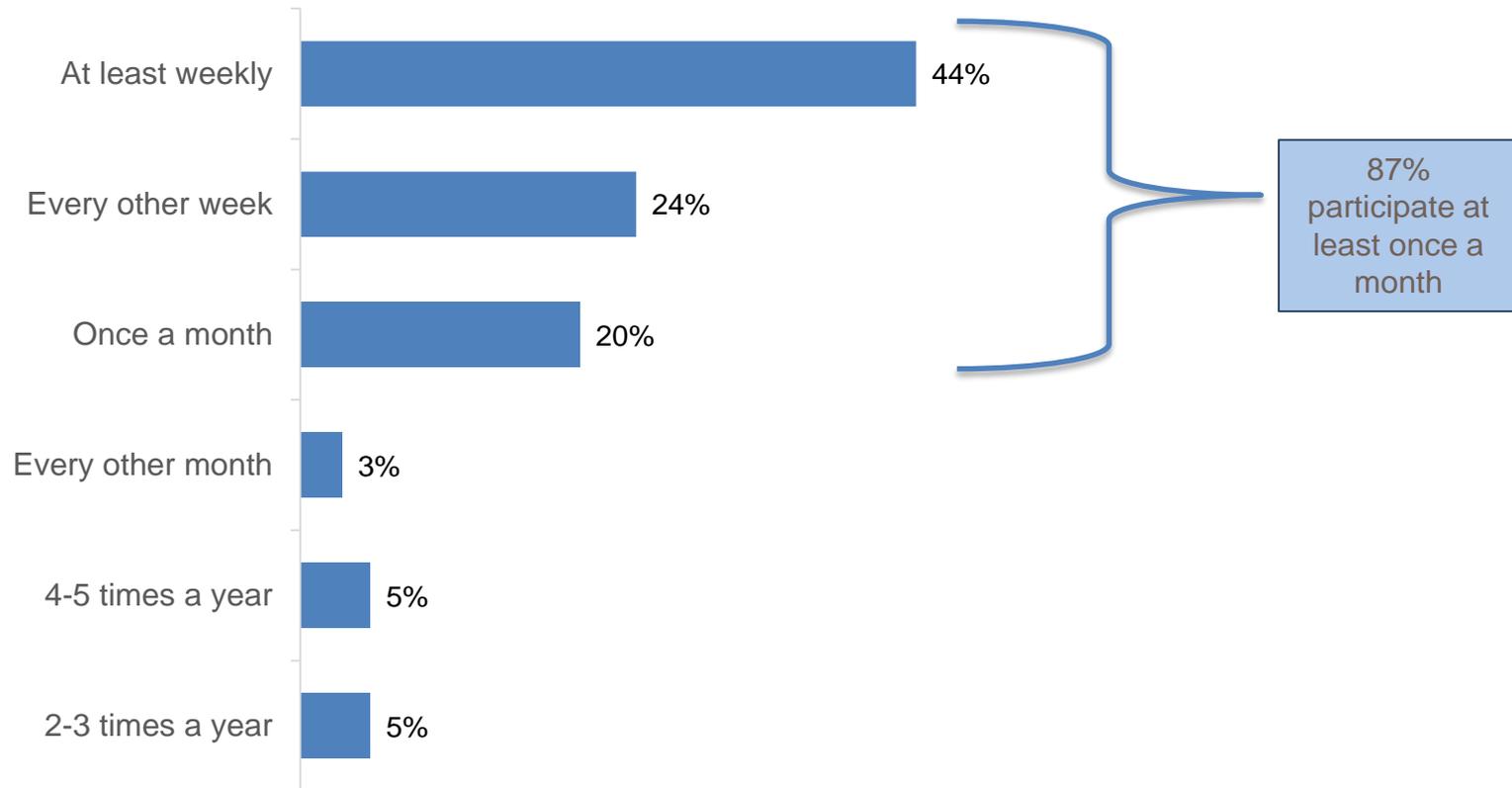
01

RBFF
Detailed
Findings

+ Demographics

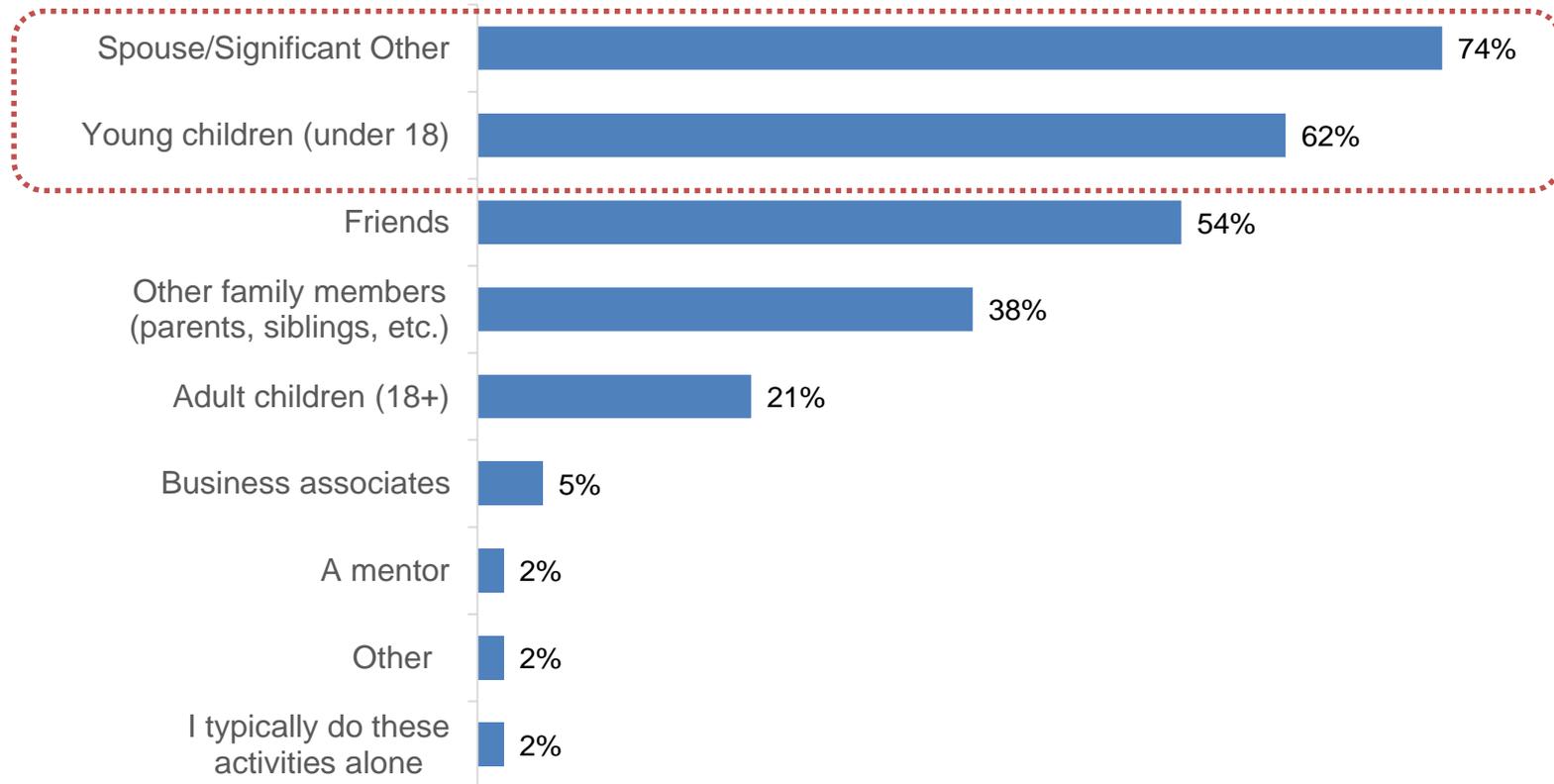
Almost nine out of ten respondents participate in outdoor activities once a month.

Frequency of Participation in Outdoor Activities



Most participate in outdoor activities with either a spouse or a significant other, or their young children.

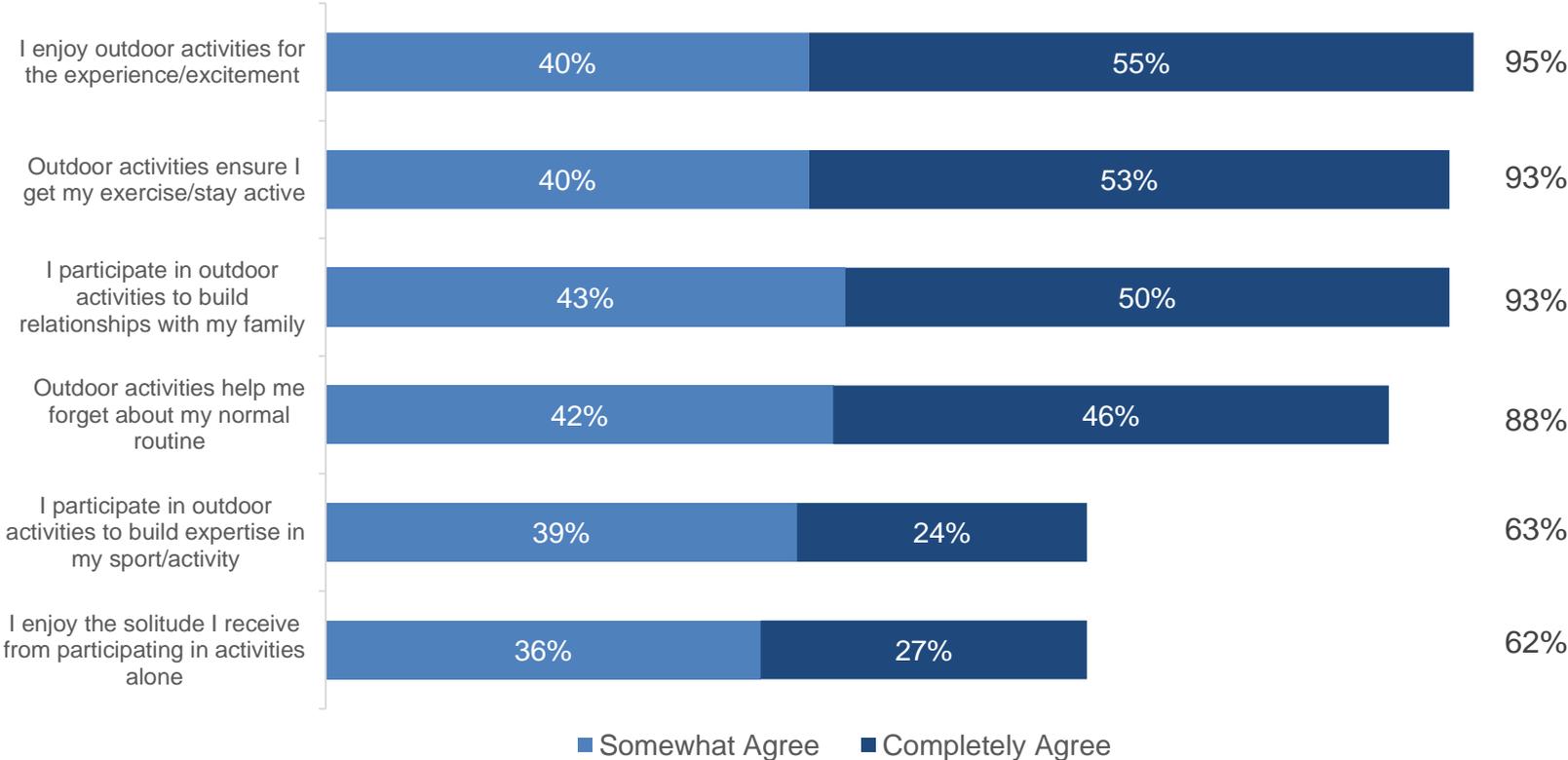
Who Outdoor Activities Are Participated With



Total equals more than 100%. Multiple responses allowed.

Respondents enjoy building relationships with their family, to gain experience and stay active.

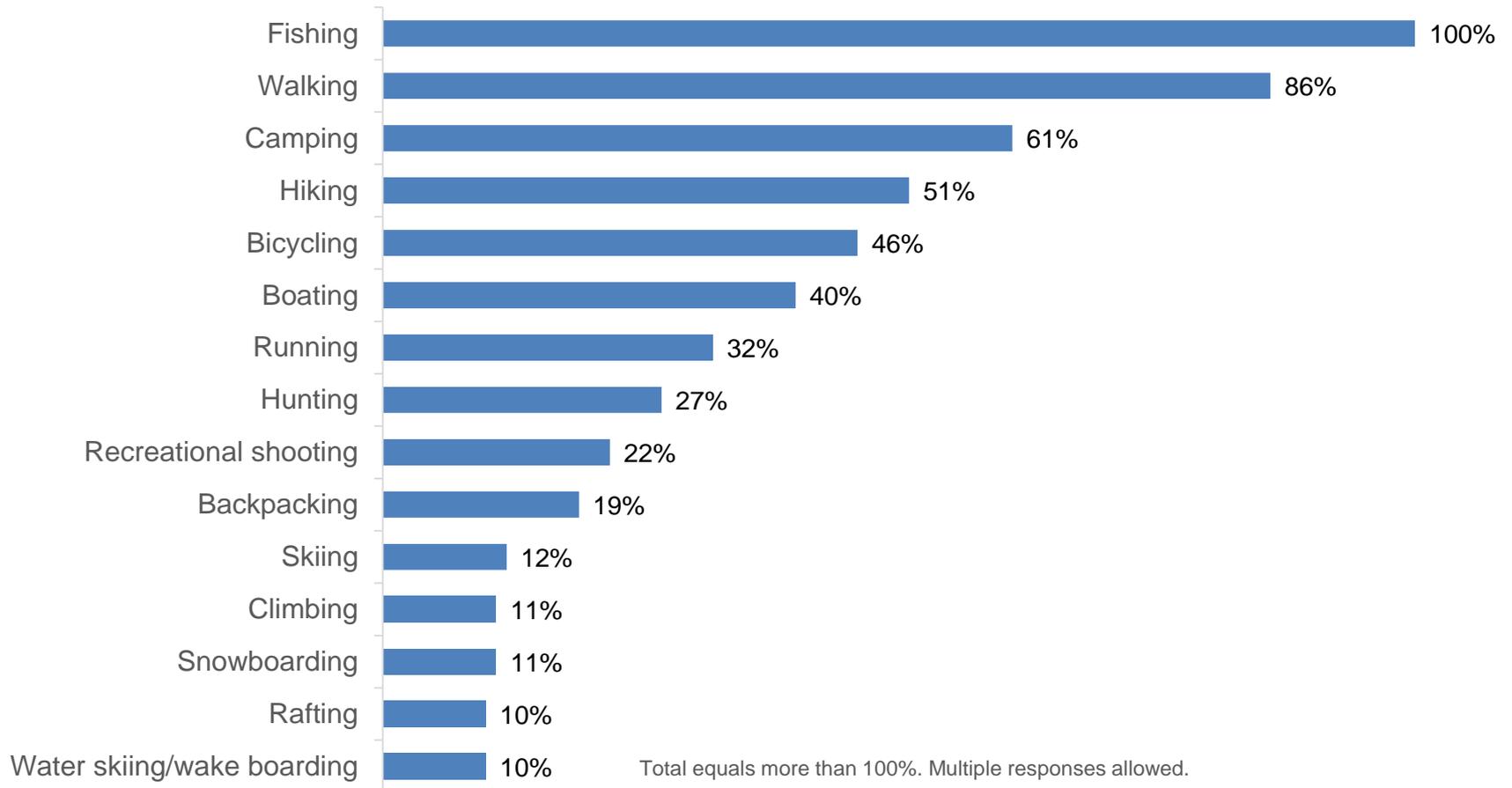
Agreement Statements
T2B Scores: (Somewhat/Completely Agree)



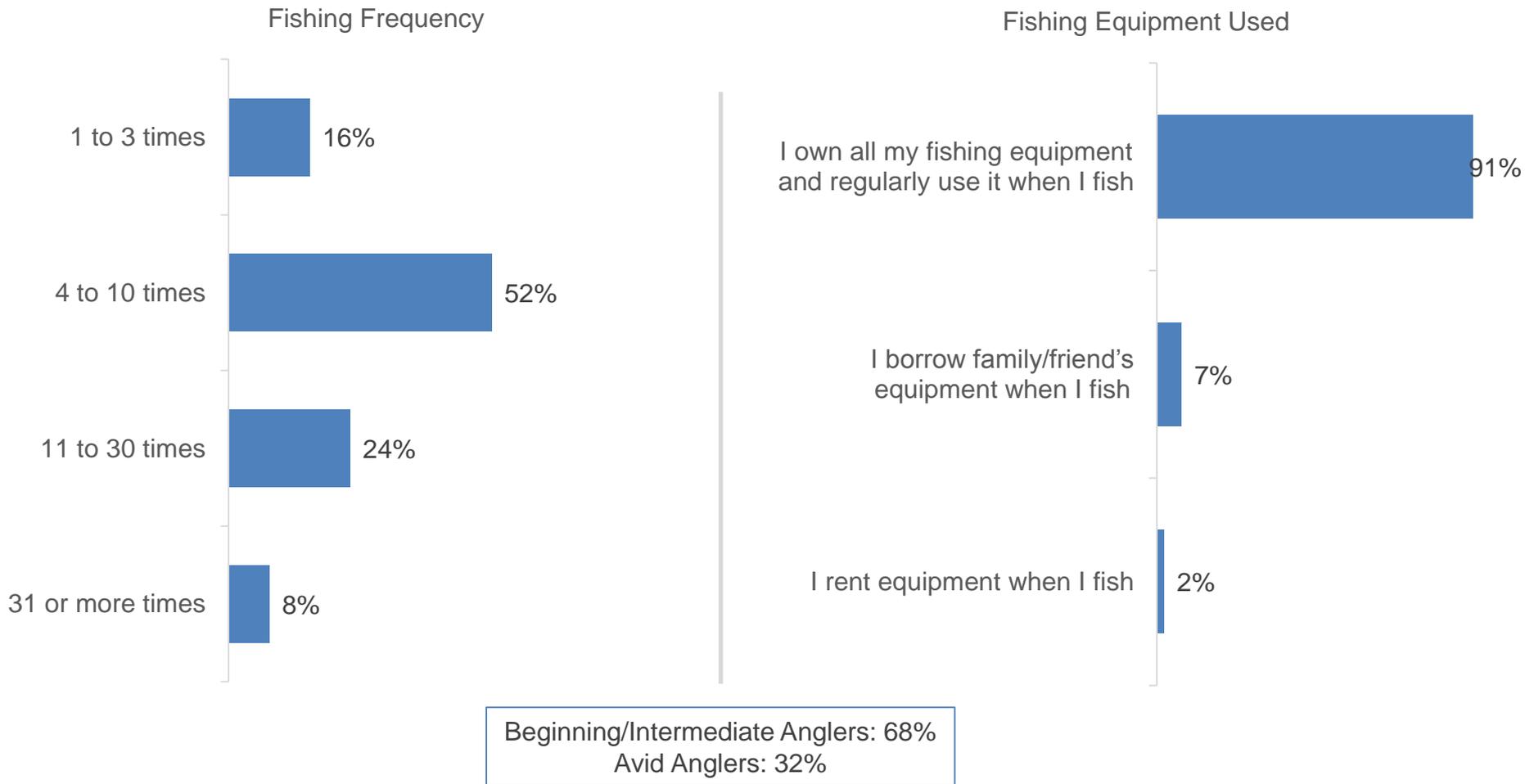
QS13. How much do you agree or disagree with each of the following statements?
Base=Total Respondents: (n=788)

Besides fishing, respondents enjoy walking, camping, hiking and bicycling.

Outdoor Activities Participate In



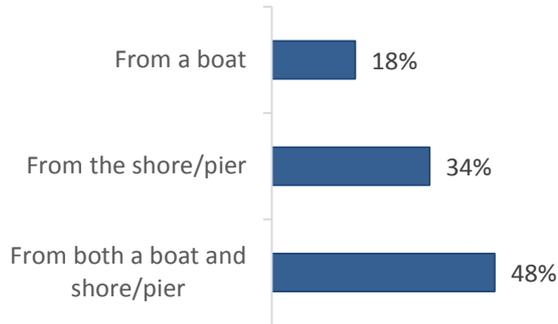
Most typically fish four to ten times per year, using their own equipment.



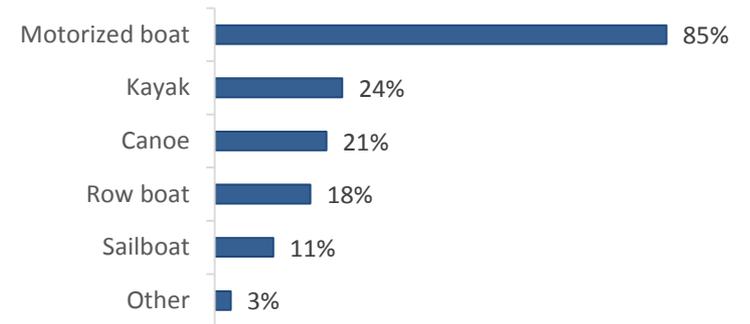
QS15. How many times do you fish in a typical year?
QS16. Which of the following best describes the equipment you use when fishing?
Base=Total Respondents (n=788)

Almost two-thirds own a boat; of those, most use their boat to fish.

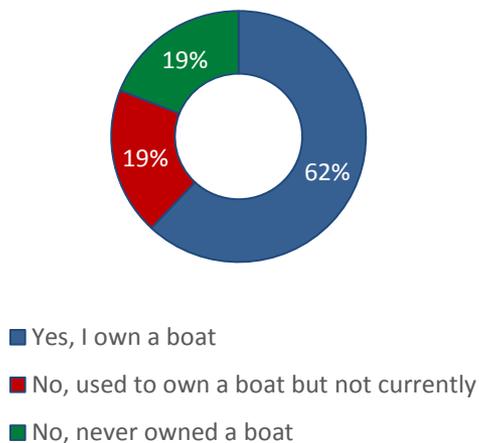
Ways Respondents Fish



Type of Boat Owned

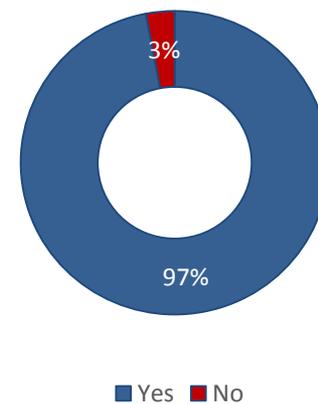


Current Boat Ownership



Boater: 24%
Non-Boater: 76%

Is Boat Used To Fish?



QS17. Which way do you typically fish? Base=Total Respondents (n=788) /QS18. Do you currently own a boat? (Base=Participate in Boating (n=316) /QS19. What type of boat do you own? Base=Currently Own a Boat (n=195) /QS20. Do you use the boat you own to fish? Base=Currently Own a Boat (n=195)

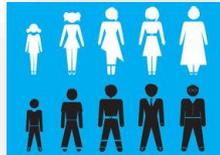
Demographics

GENDER



58% 42%

AGE



18-34: 31%
 35-44: 23%
 45-54: 20%
 55-64: 17%
 65+: 9%

REGION



Mountain: 7%
 Pacific: 12%
 South Atlantic: 22%
 East North Central: 17%
 West North Central: 9%
 East South Central: 7%
 West South Central: 10%
 New England: 4%
 Middle Atlantic: 12%

HH INCOME



<\$30K: 2%
 \$30K-\$49,999: 4%
 \$50K-\$74,999: 41%
 \$75K-\$99,999: 26%
 \$100K-\$124,999: 14%
 \$125K+: 12%
 Prefer not to answer: 1%

EMPLOYMENT



Full-Time: 57%
 Part-Time: 9%
 Temporarily Unemployed: 1%
 Student: 2%
 Homemaker: 16%
 Retired: 13%
 Not employed: 2%

HISPANIC



Yes: 8%
 No: 92%

RACE



Caucasian: 87%
 African/Black: 6%
 Asian: 4%
 American Indian/
 Alaskan Native: 1%
 Other: 2%

KIDS UNDER 18



Yes: 65%
 No: 35%

MARITAL STATUS

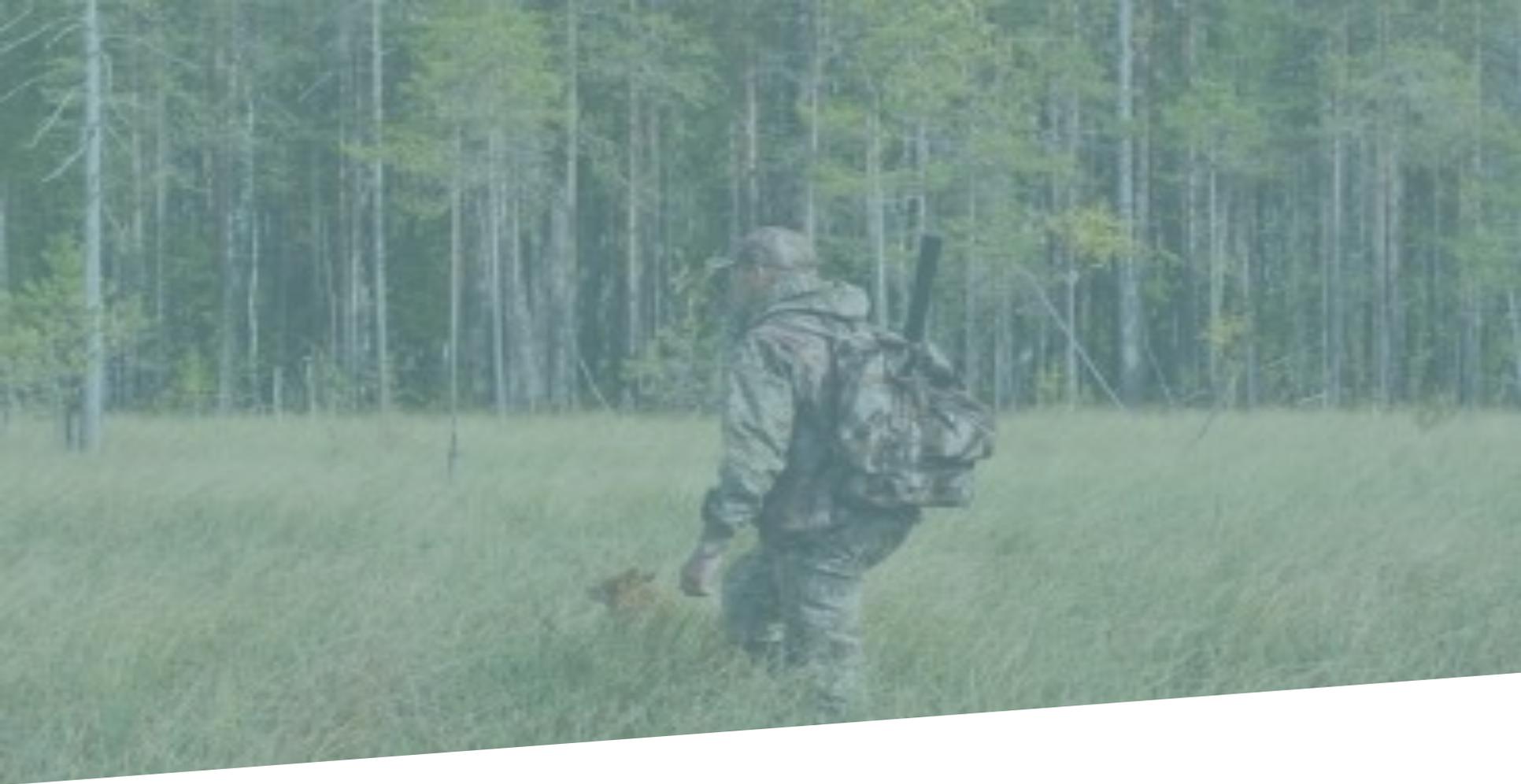


Single: 9%
 Married: 79%
 Living w/sign. other: 7%
 Divorced/Separated: 4%
 Widowed: 1%

EDUCATION



Some college or less: 43%
 College graduate: 37%
 Completed graduate school: 6%
 Post-graduate work: 14%



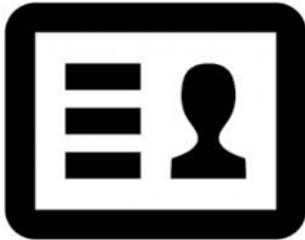
02

CAHSS
Detailed
Findings

- + Licensing
- + Conservation
- + Message
Prioritization

Nearly everyone is aware they need a license, and a large amount of Shooters hold one.

Recreational Shooters: Licensing Awareness & Behaviors



93% are aware that they need a license to fish or hunt

83% hold a license

- 59% Annual
- 25% Short term
- 10% Lifetime



Where learned about it?

- General knowledge: 61%
- State fish and wildlife agency website: 34%
- Sporting/retail store: 17%
- A friend: 22%
- Other website: 11%



Where purchased?

- Sporting/retail store: 78%
- Online: 29%
- Toll free number: 6%

Q2. Do you know if you need a license to fish, or hunt? Base=Total Shooters (n=376) Q3. What kind of fishing license have you purchased in the past?

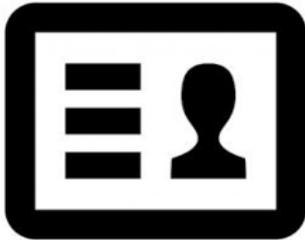
Base=Total Shooters (n=376)

Q4a. How did you find out you needed a fishing license? Base= Shooter License Holder (n=311)

Q4. Where did you purchase your fishing license? Base=Shooter License Holder (n=311)

Much like Shooters, almost all Hunters are aware they need a license, but more Hunters hold a license than Shooters.

Hunters: Licensing Awareness & Behaviors



93% are aware that they need a license to fish or hunt

97% hold a license

- 72% Annual
- 29% Short term
- 6% Lifetime



Where learned about it?

- General knowledge: 65%
- State fish and wildlife agency website: 33%
- Sporting/retail store: 18%
- A friend: 22%
- Other website: 8%

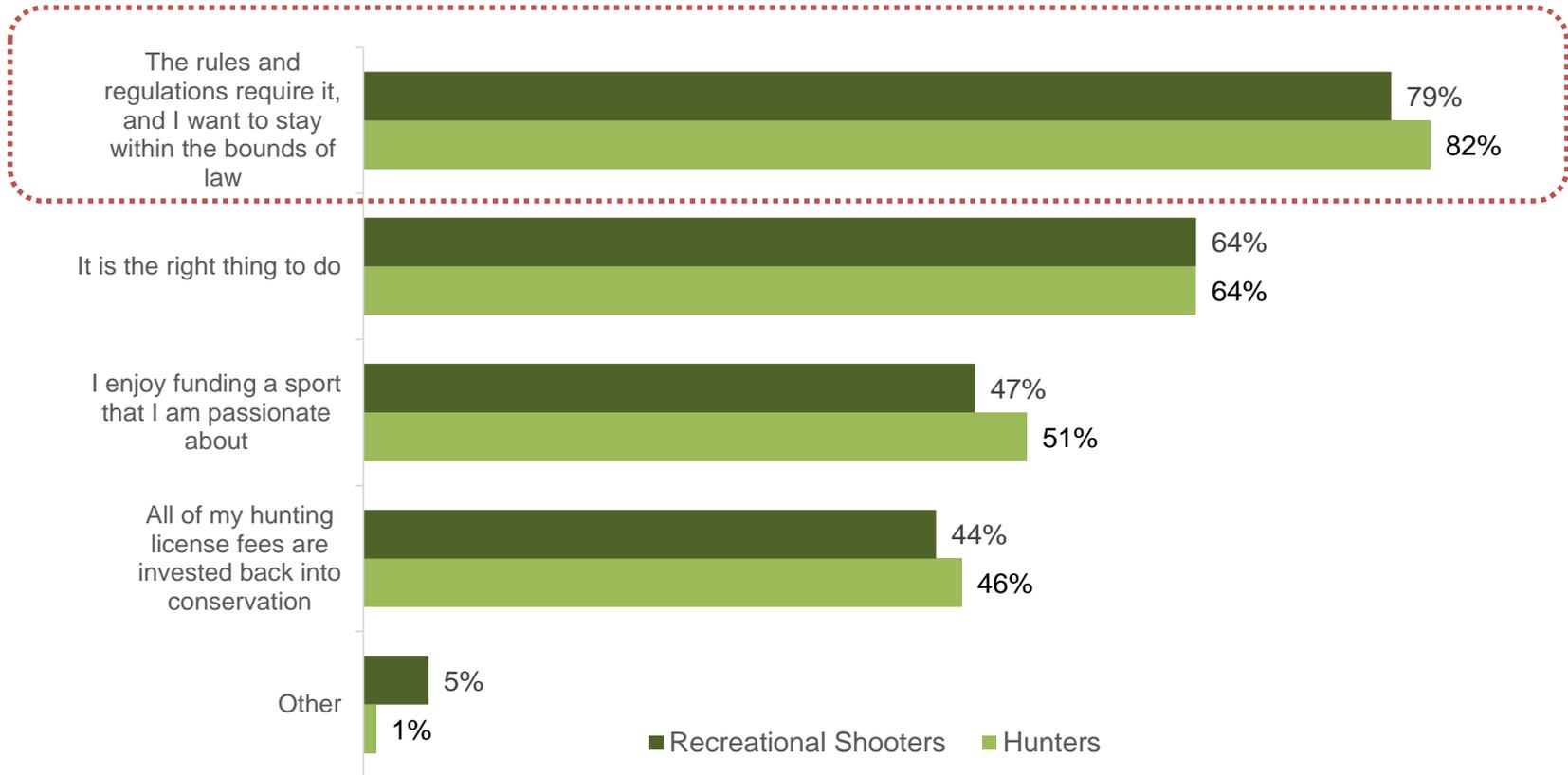


Where purchased?

- Sporting/retail store: 81%
- Online: 24%
- Toll free number: 6%

Shooters and Hunters feel similarly on why they purchase a license: because the rules and regulations require it.

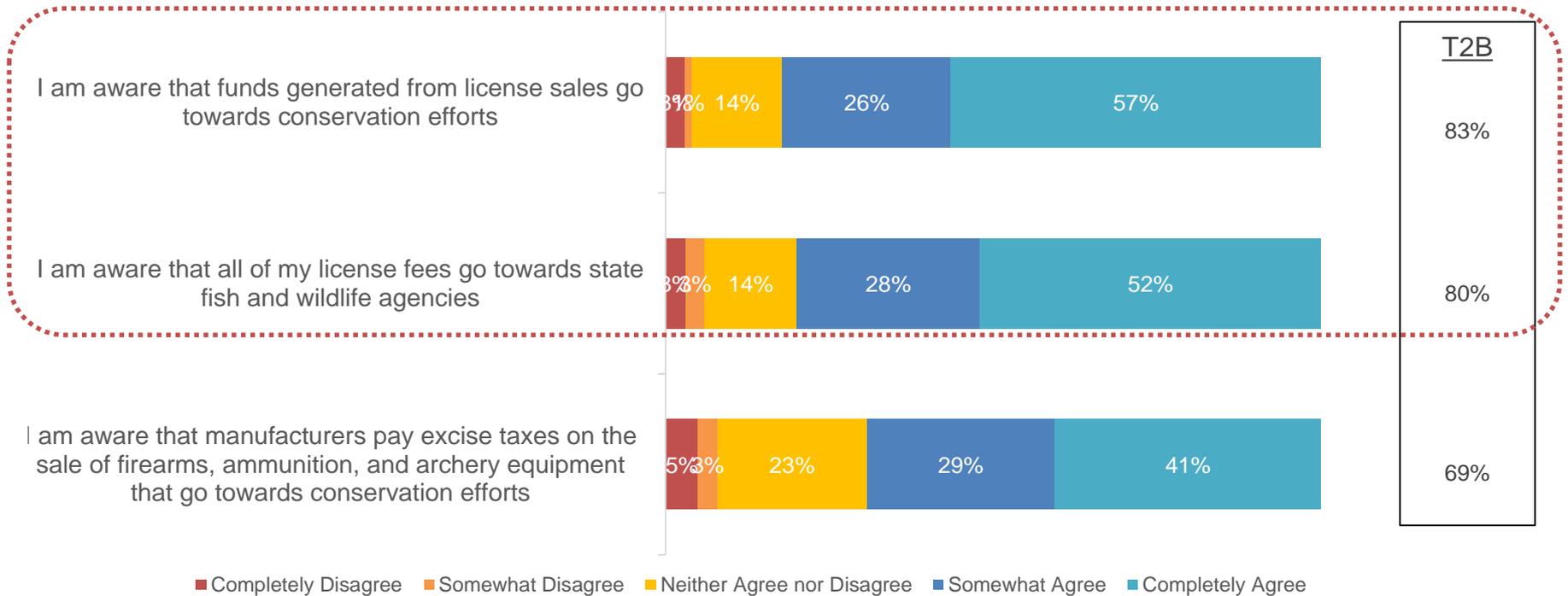
Reasons Purchased Hunting License



Totals equals more than 100%. Multiple responses allowed.

When asked directly, a large majority of Shooters are aware that license funds go towards conservation efforts.

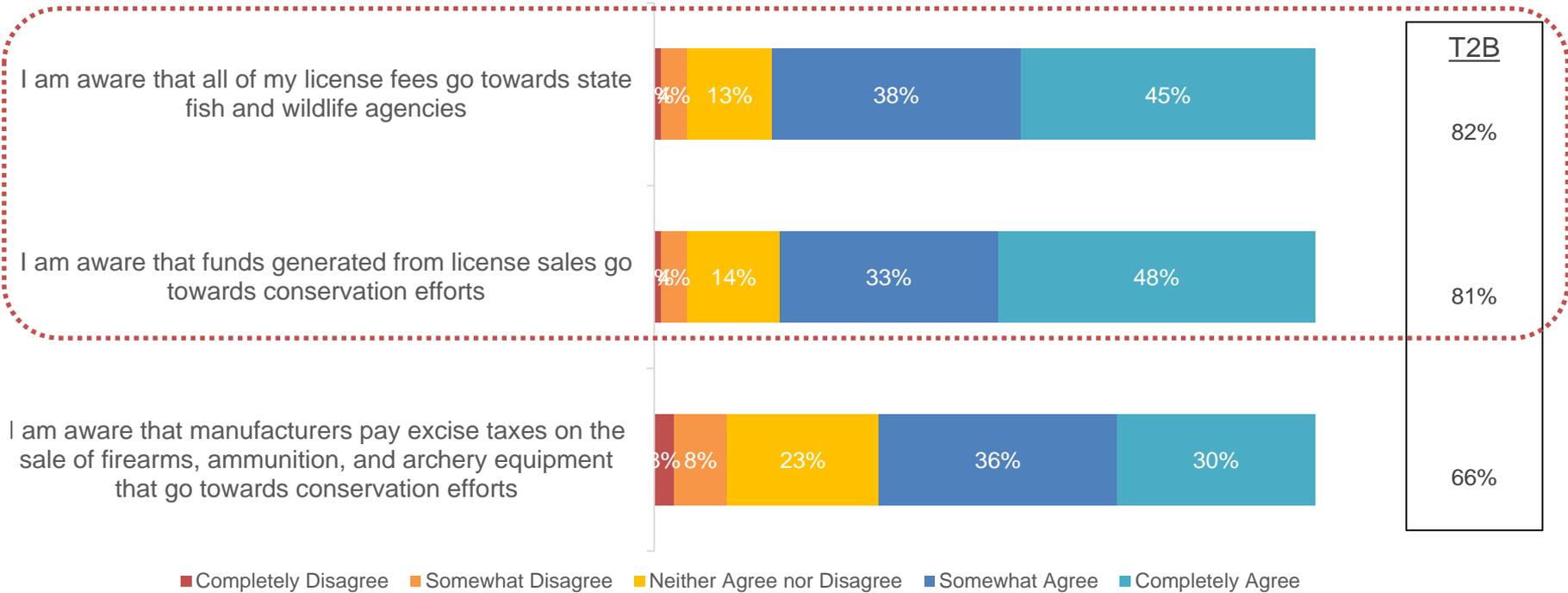
Recreational Shooters: Agreement Statements



Q6. Before you go fishing and hunting, you do need a license. Please indicate how much you agree or disagree with each statement. Base=Total Shooters (n=376)

Similar to Shooters, most Hunters are also aware that license funds go towards conservation efforts.

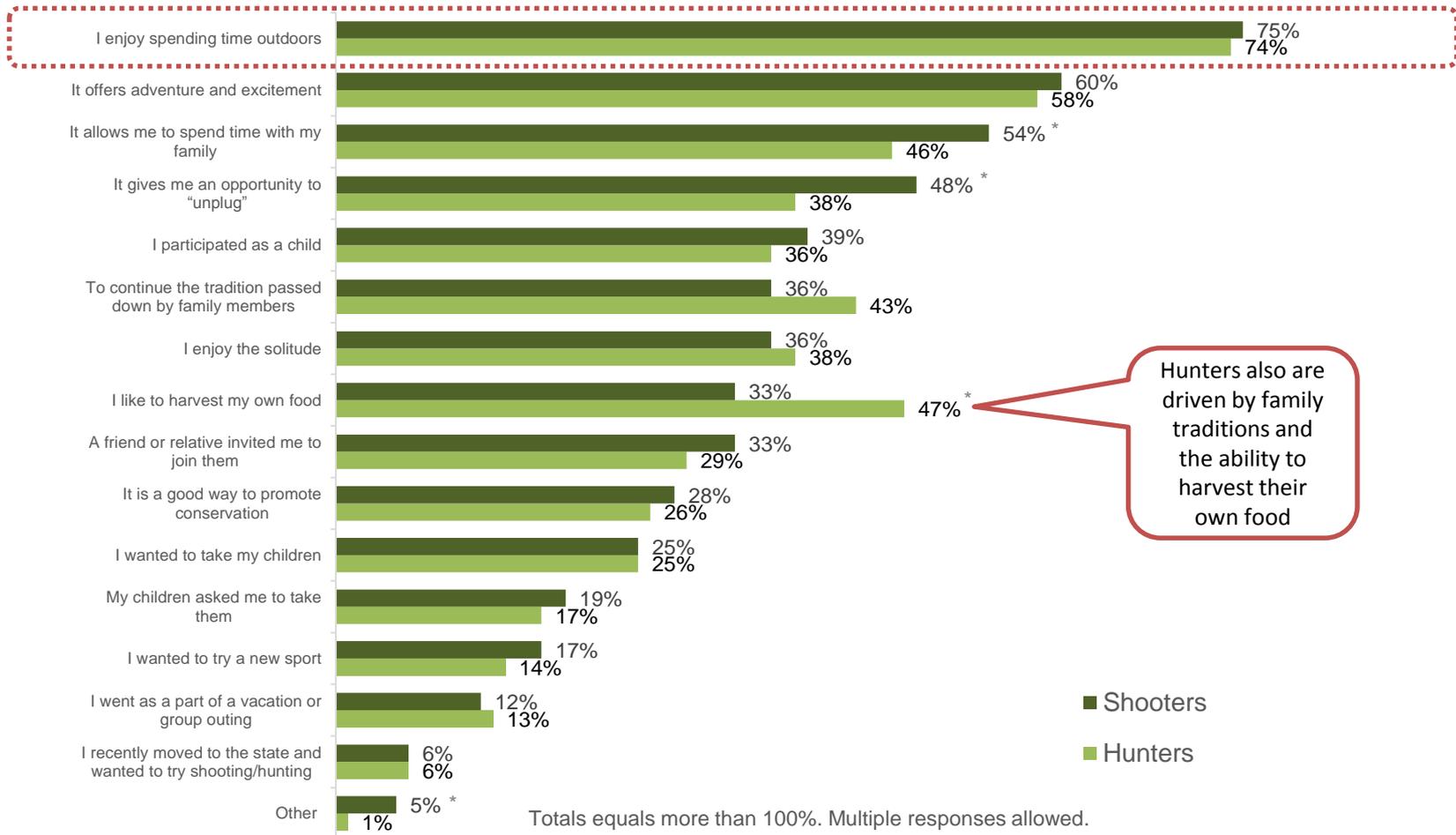
Hunters: Agreement Statements



Q6. Before you go fishing and hunting, you do need a license. Please indicate how much you agree or disagree with each statement. Base=Total Hunters (n=376)

Conservation is not a main reason why respondents shoot or hunt; Instead, they enjoy spending times outdoors and seek the adventure and excitement associated with the sport.

Reasons to Hunt/Shoot



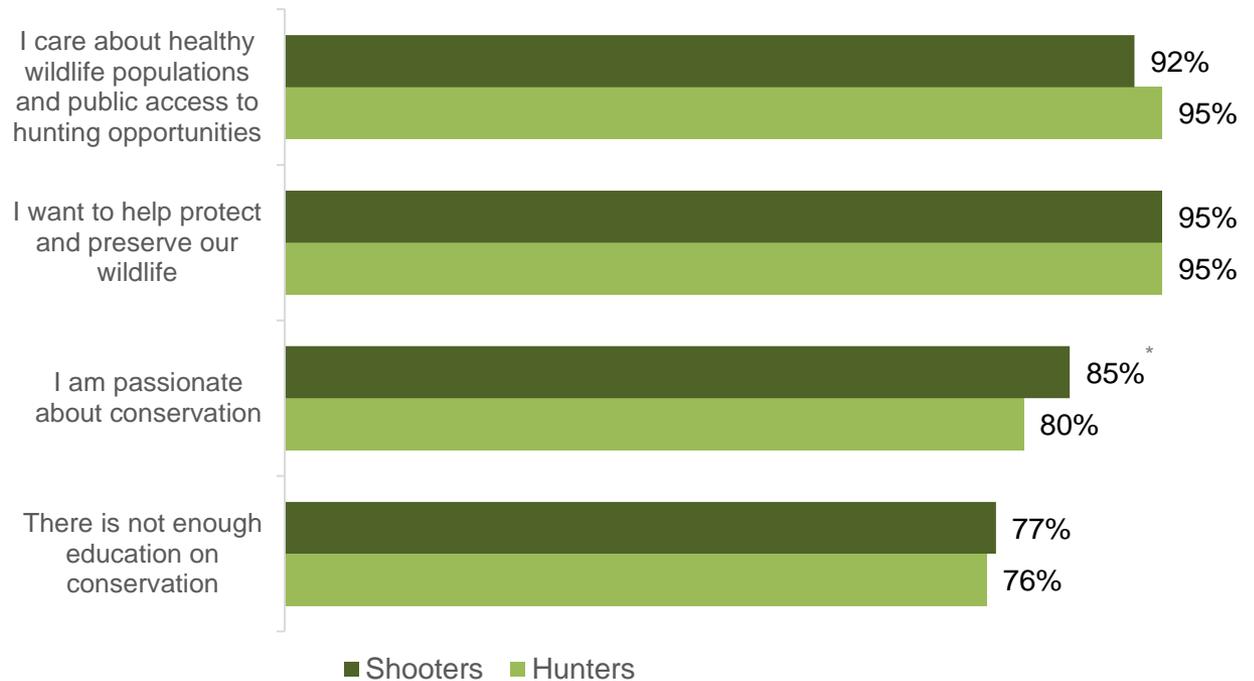
Q1. Which of the following are reasons why you hunt/participate in shooting sports?
 Base=Total Respondents (Recreational Shooters: n=376; Hunters: n=376)
 NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

Nearly all care about healthy wildlife populations and appreciate that their fees goes towards conservation efforts. Shooters are significantly more likely than Hunters to say they are passionate about conservation.



93% of Shooters and 92% of Hunters like that all their licensing fees goes towards conservation

License Agreement Statements
(T2B: Somewhat/Completely Agree)



Q9. When you purchase a hunting license, all the fees go towards conservation. Knowing this, how do you feel about these efforts?

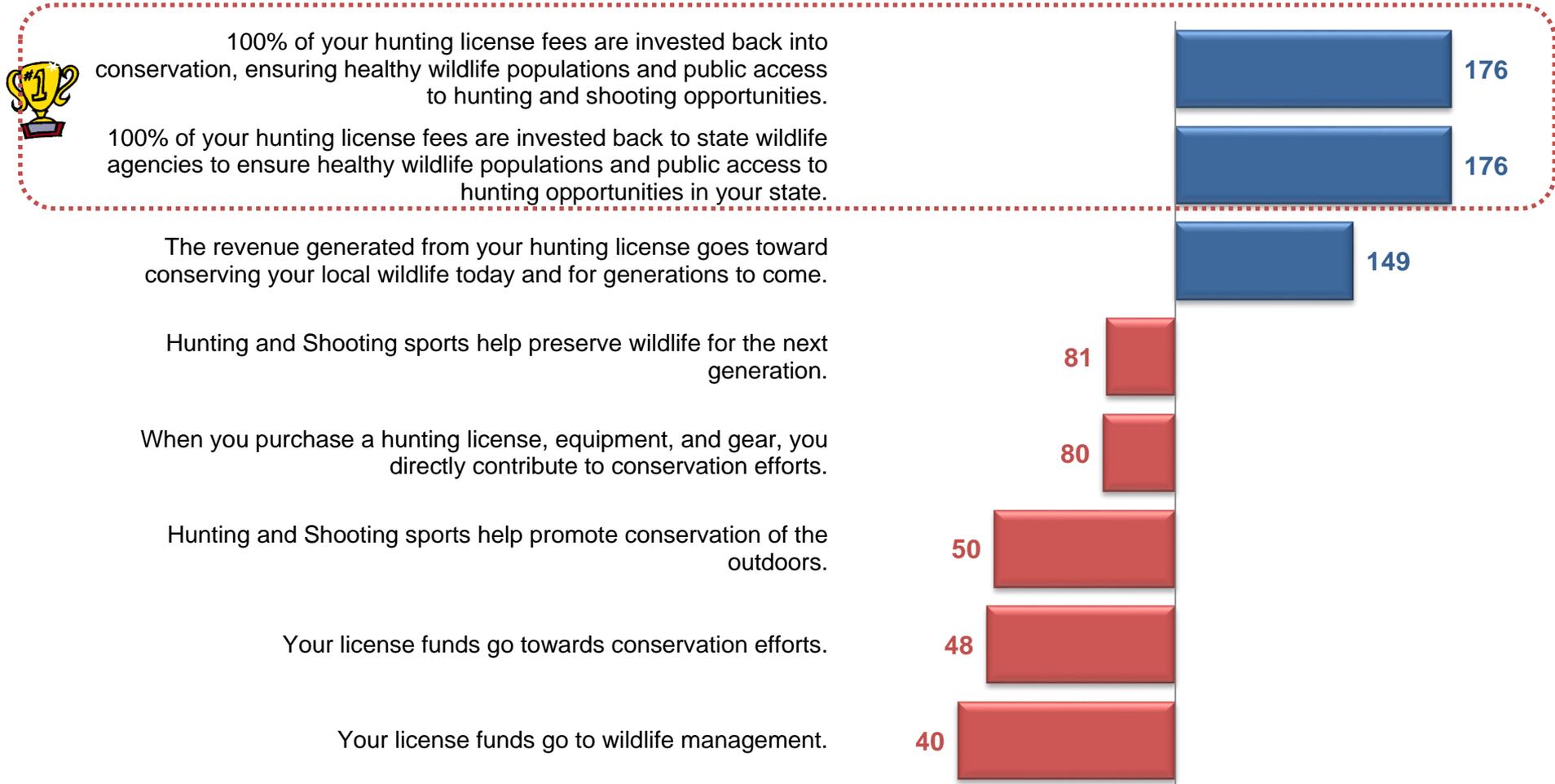
Q10. Please indicate how much you agree or disagree with each of the following statements regarding hunting licenses.

Base=Total Respondents (Recreational Shooters: n=376; Hunters: n=376)

NOTE: * denotes statistical significance at the 95% confidence level.

The two highest conservation messages detail out that 100% of hunting licensing fees are invested back into ensuring healthy wildlife populations.

CAHSS Max Diff Index Scores



Which one of the following conservation messages is the most meaningful to you and which conservation message is the least meaningful to you?

Base=Total Respondents (n=752)



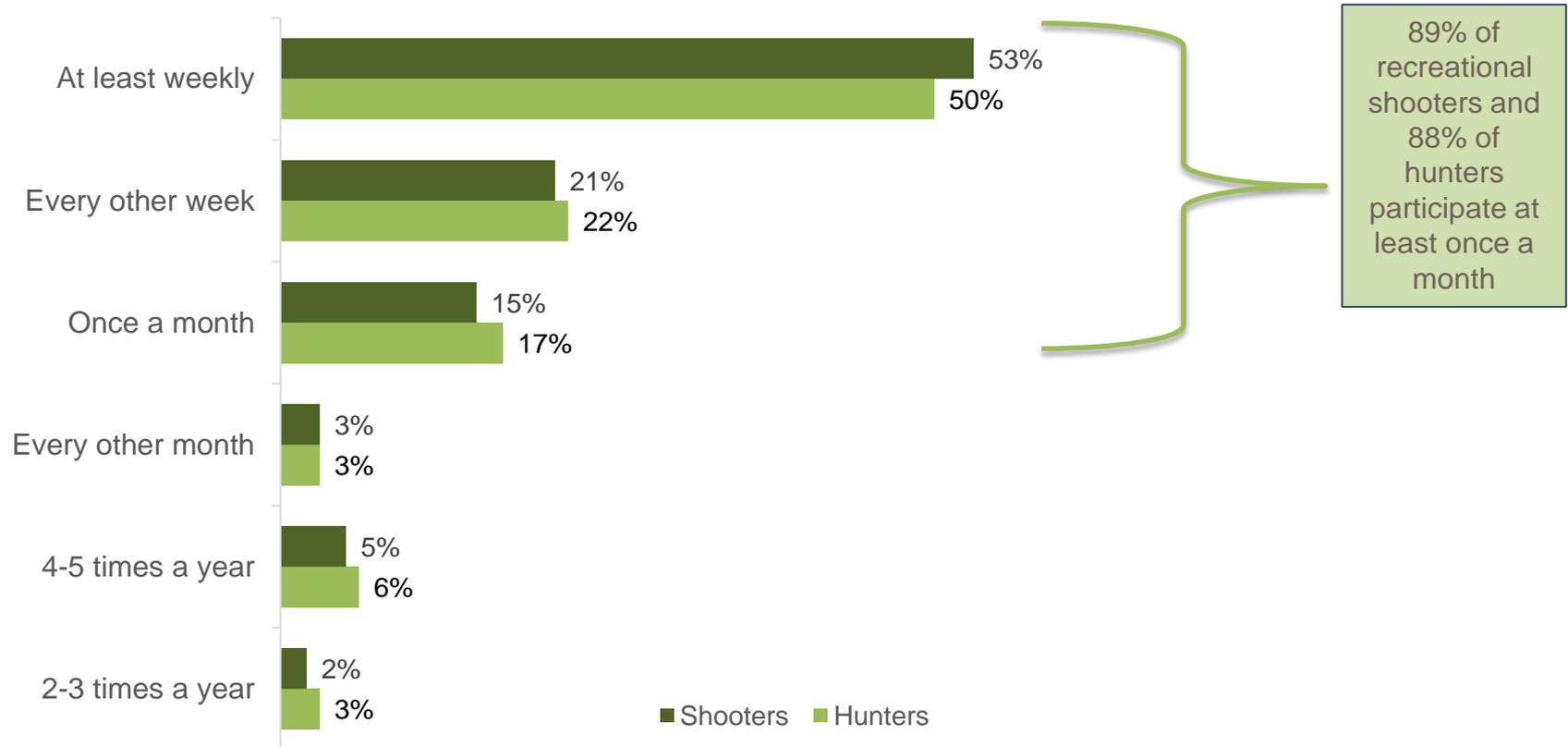
02

CAHSS
Detailed
Findings

+ Demographics

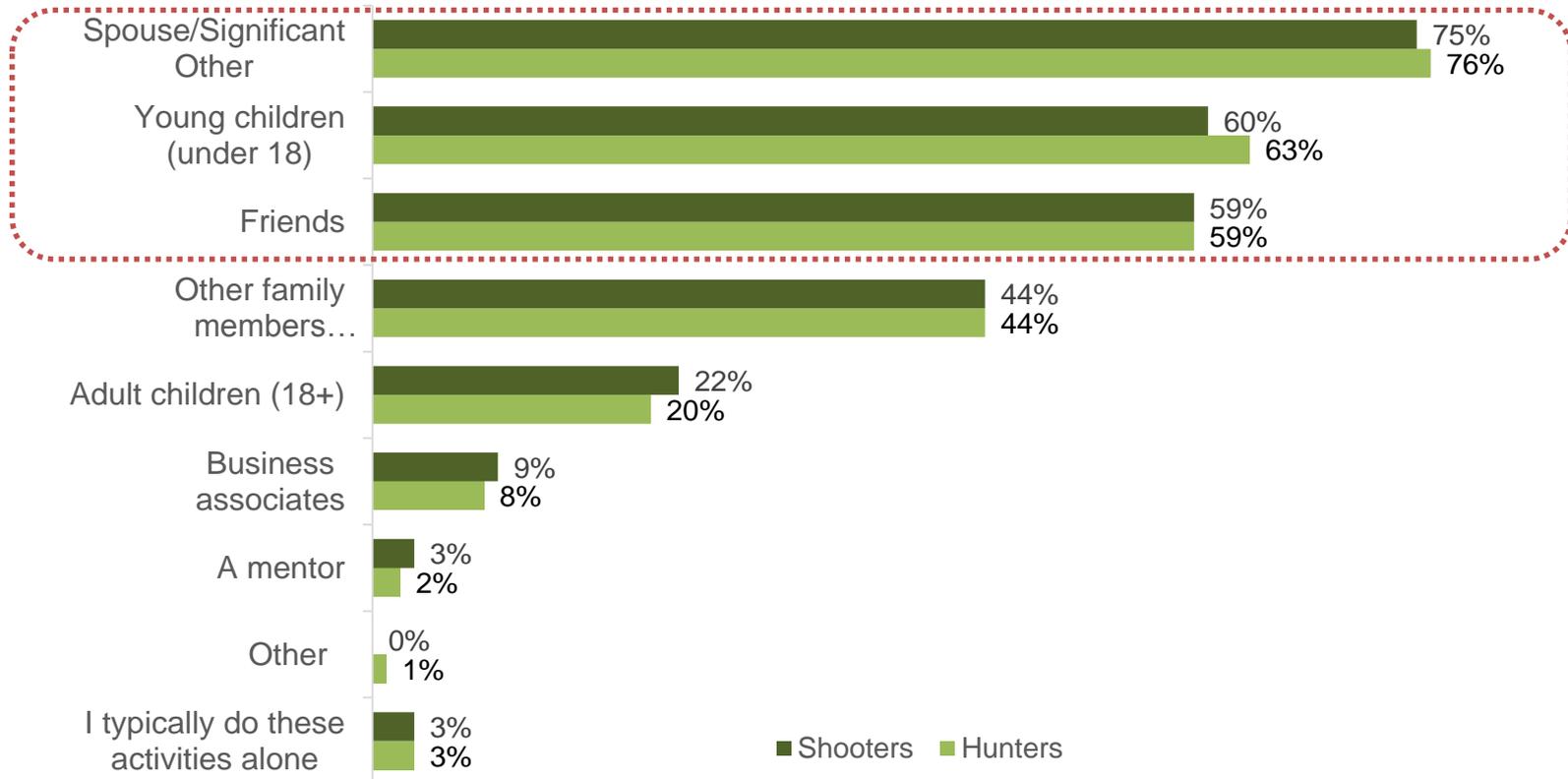
The majority of Shooters and Hunters participate in outdoor activities at least once a month.

Frequency of Participation in Outdoor Activities



Most participate in outdoor activities with either a spouse or a significant other, their young children or their friends.

Who Outdoor Activities Are Participated With



Totals equals more than 100%. Multiple responses allowed.

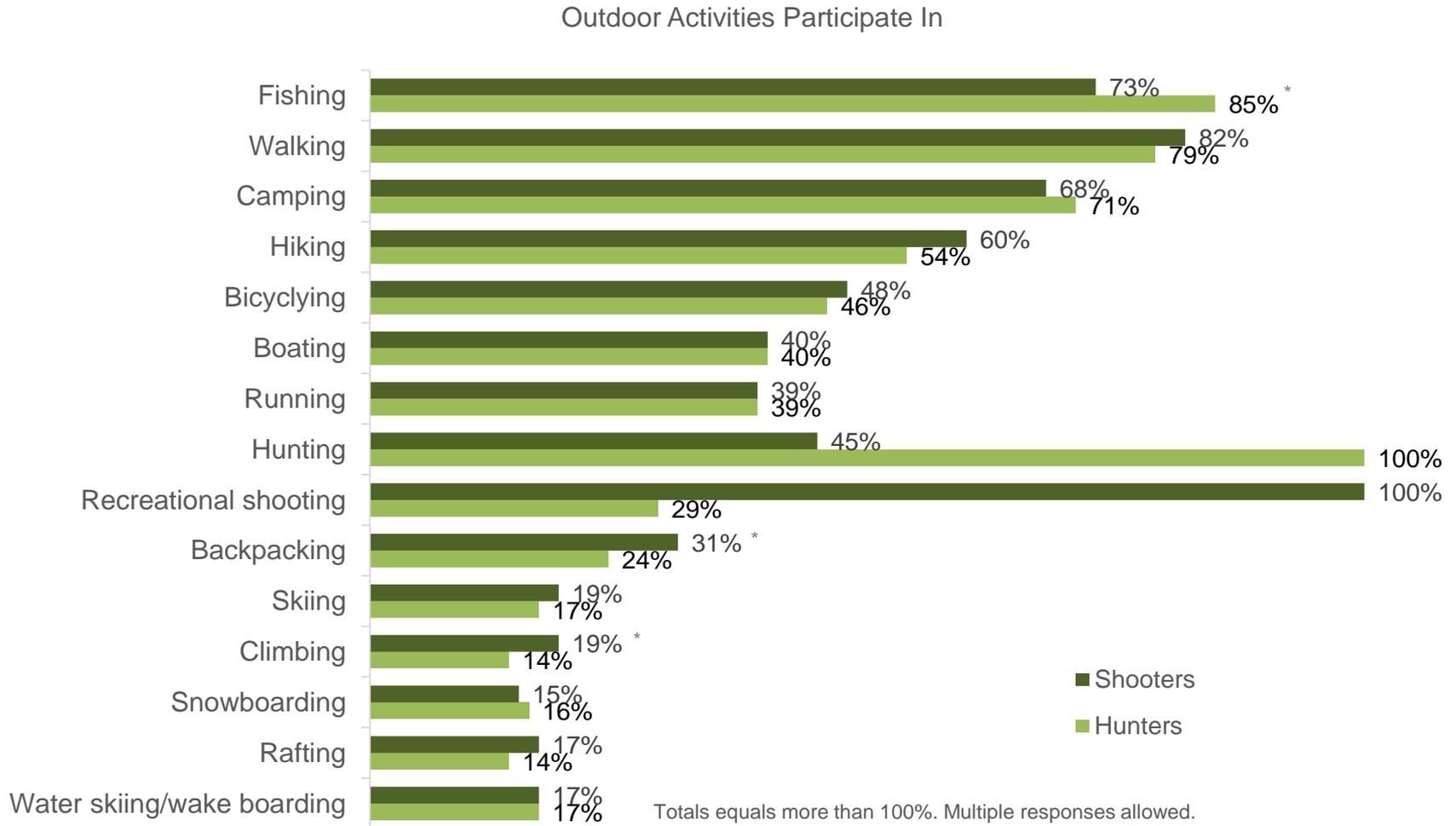
Both Shooters and Hunters value similar things for why they participate in outdoor activities.

Agreement Statements
T2B Scores: (Somewhat/Completely Agree)

■ Shooters ■ Hunters



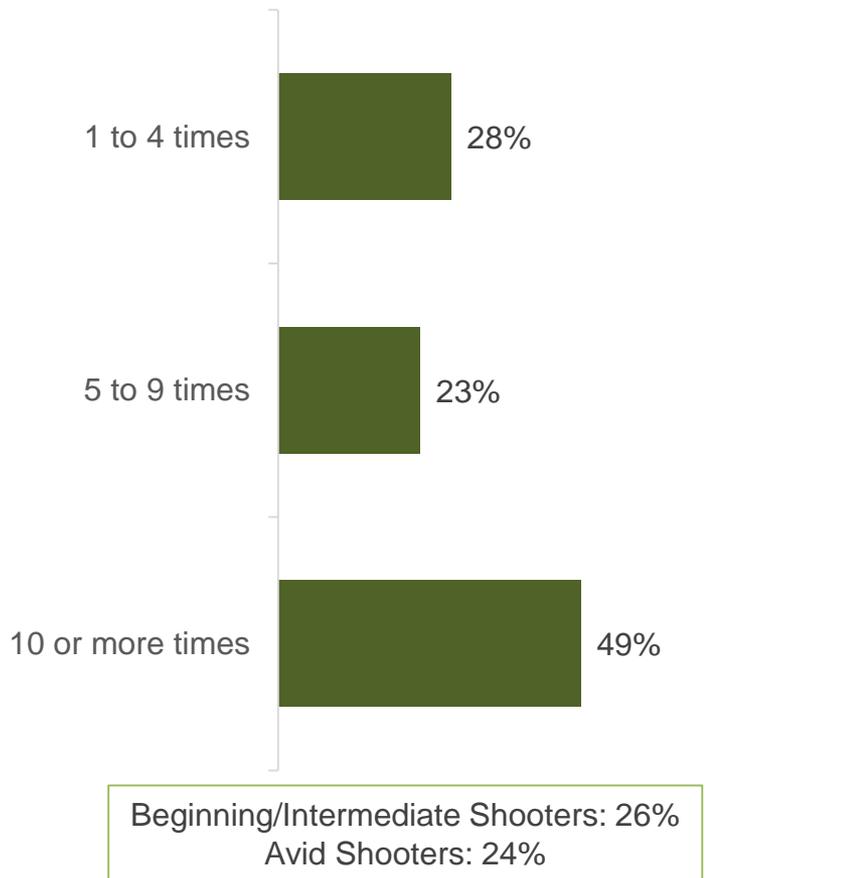
Besides Shooting and Hunting, respondents enjoy walking, camping, hiking and bicycling. Hunters are significantly more likely to say they participate in fishing.



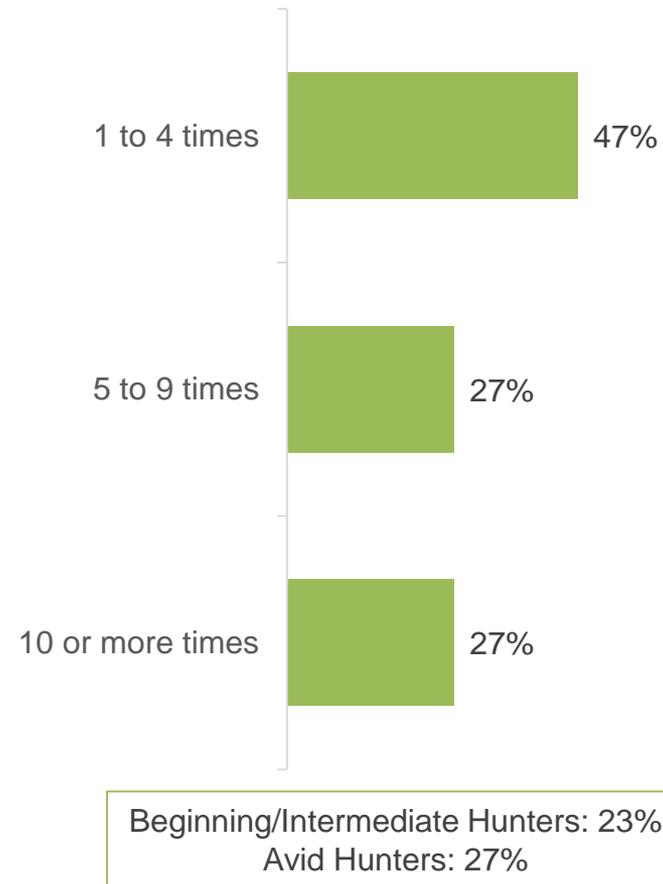
QS14. Which of the following outdoor activities do you participate in?
 Base=Total Respondents (Recreational Shooters: n=376; Hunters: n=376)
 NOTE: * denotes statistical significance at the 95% confidence level.

Shooters actively participate more often than Hunters, who typically hunt between 1-4 times per year.

Frequency of Recreational Shooting



Frequency of Hunting



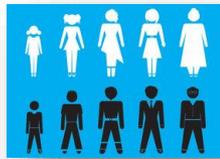
Demographics

GENDER



47% 53%

AGE



18-34: 41%
35-44: 25%
45-54: 15%
55-64: 12%
65+: 7%

REGION



Mountain: 9%
Pacific: 15%
South Atlantic: 20%
East North Central: 15%
West North Central: 8%
East South Central: 7%
West South Central: 11%
New England: 2%
Middle Atlantic: 13%

HH INCOME



<\$30K: 4%
\$30K-\$49,999: 6%
\$50K-\$74,999: 36%
\$75K-\$99,999: 30%
\$100K-\$124,999: 13%
\$125K+: 10%
Prefer not to answer: 1%

EMPLOYMENT



Full-Time: 65%
Part-Time: 8%
Temporarily Unemployed: 1%
Student: 2%
Homemaker: 12%
Retired: 10%
Not employed: 1%

HISPANIC



Yes: 7%
No: 93%

RACE



Caucasian: 90%
African/Black: 4%
Asian: 2%
American Indian/
Alaskan Native: 1%
Other: 2%
Prefer not to answer: 1%

KIDS UNDER 18



Yes: 69%
No: 31%

MARITAL STATUS

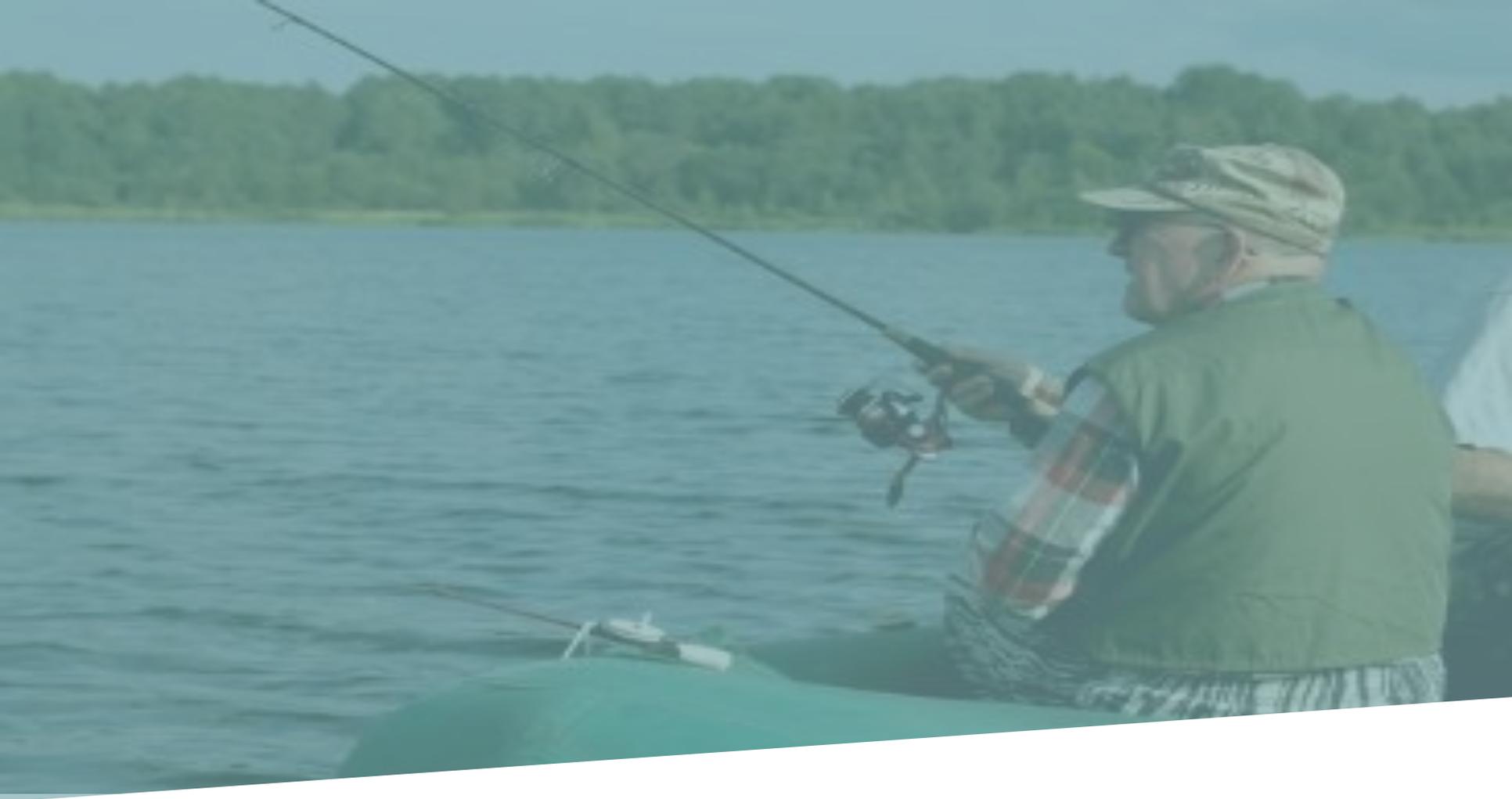


Single: 9%
Married: 77%
Living w/sign. other: 7%
Divorced/Separated: 6%
Widowed: 1%

EDUCATION



Some college or less: 41%
College graduate: 37%
Completed graduate school: 8%
Post-graduate work: 13%

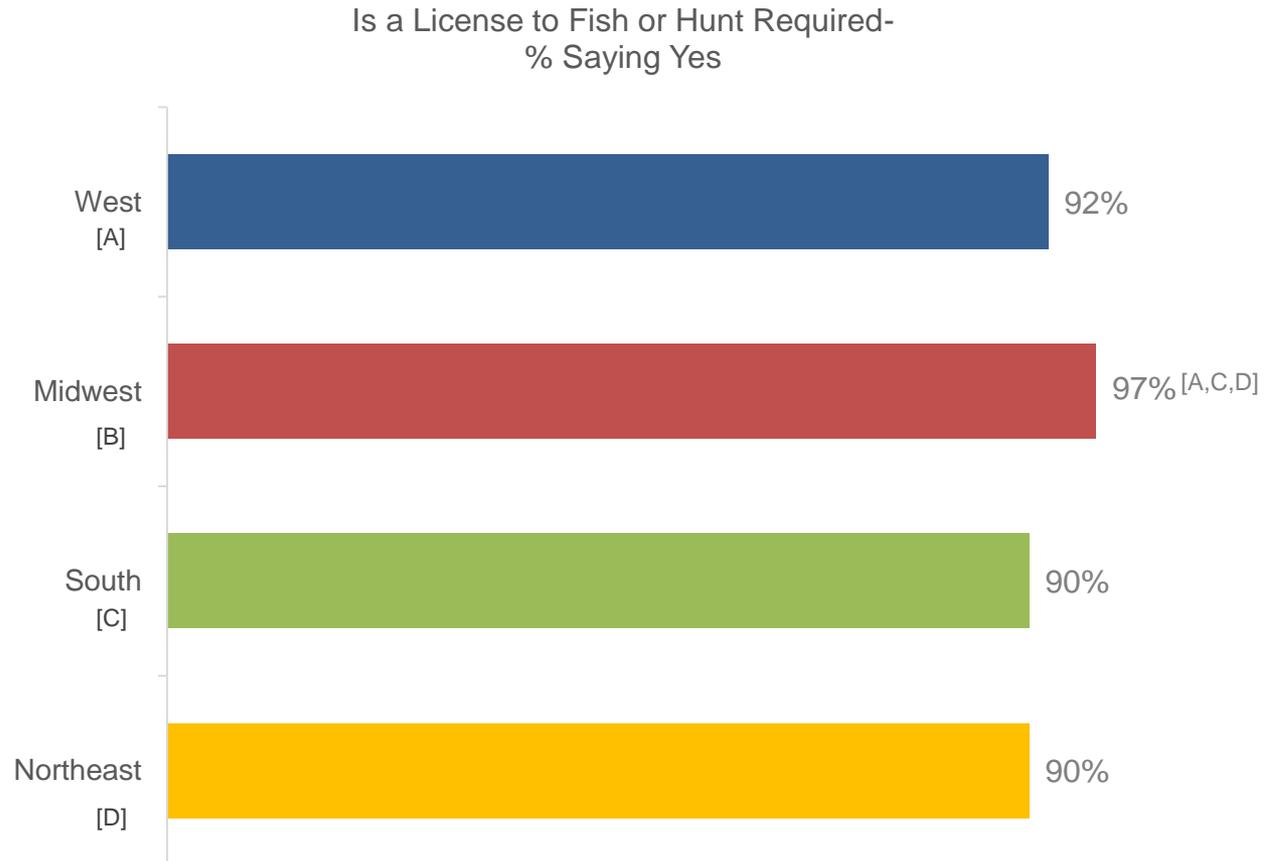


03

Combined
Detailed
Findings

+ Regional
analyses

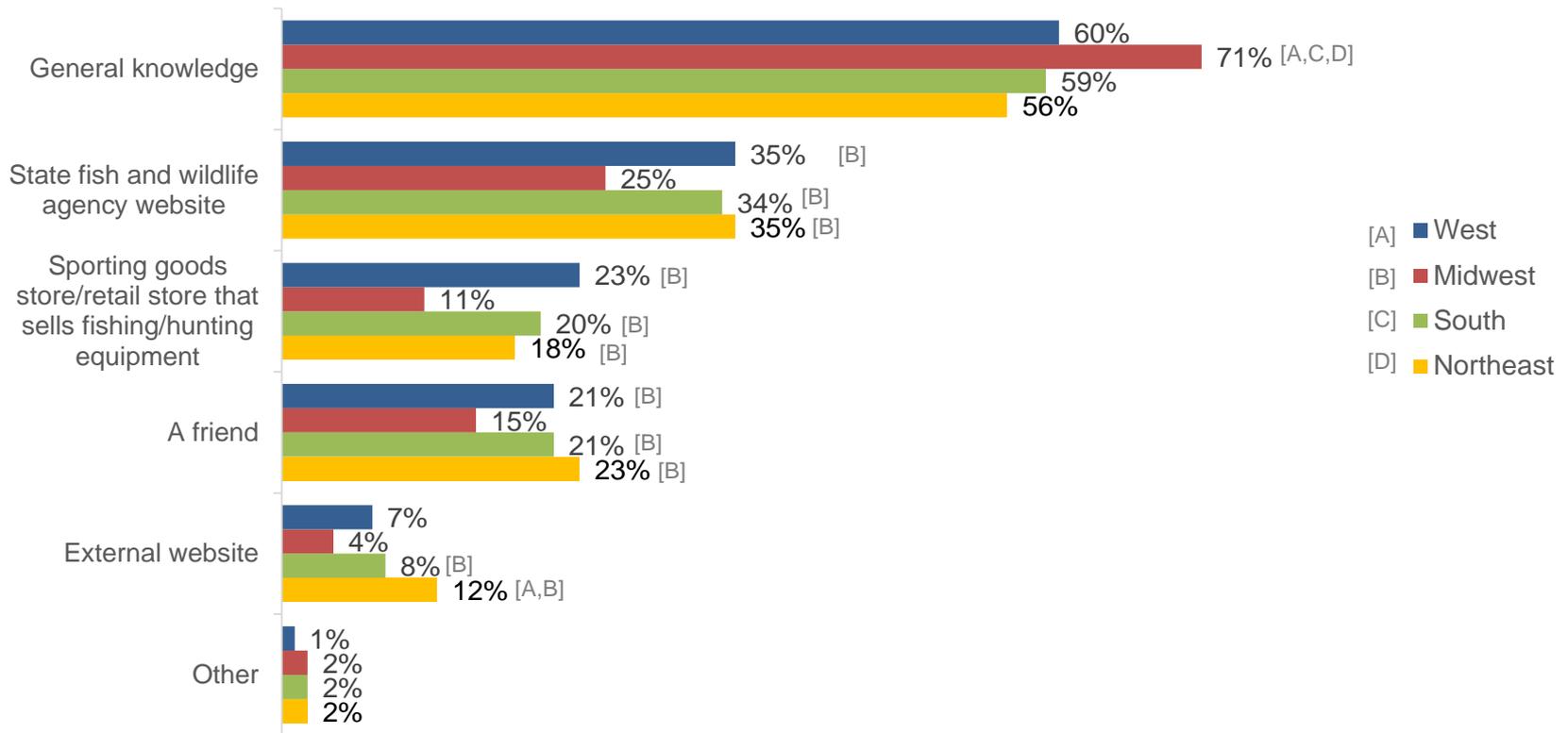
Mostly everyone knows they need a license to fish, or hunt, regardless of region; however, the Midwest is significantly more likely than any other region to know this.



Q2. Do you know if you need a license to fish, or hunt?
Base=West (n=329), Midwest (n=376), South (n=593), Northeast (n=242)
NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

Most knew they needed a license mostly by general knowledge and through their state fish and wildlife agency website. General knowledge is significantly more likely to be how they learned in the Midwest than any other region.

How They Learned A Fishing/Hunting License Is Needed

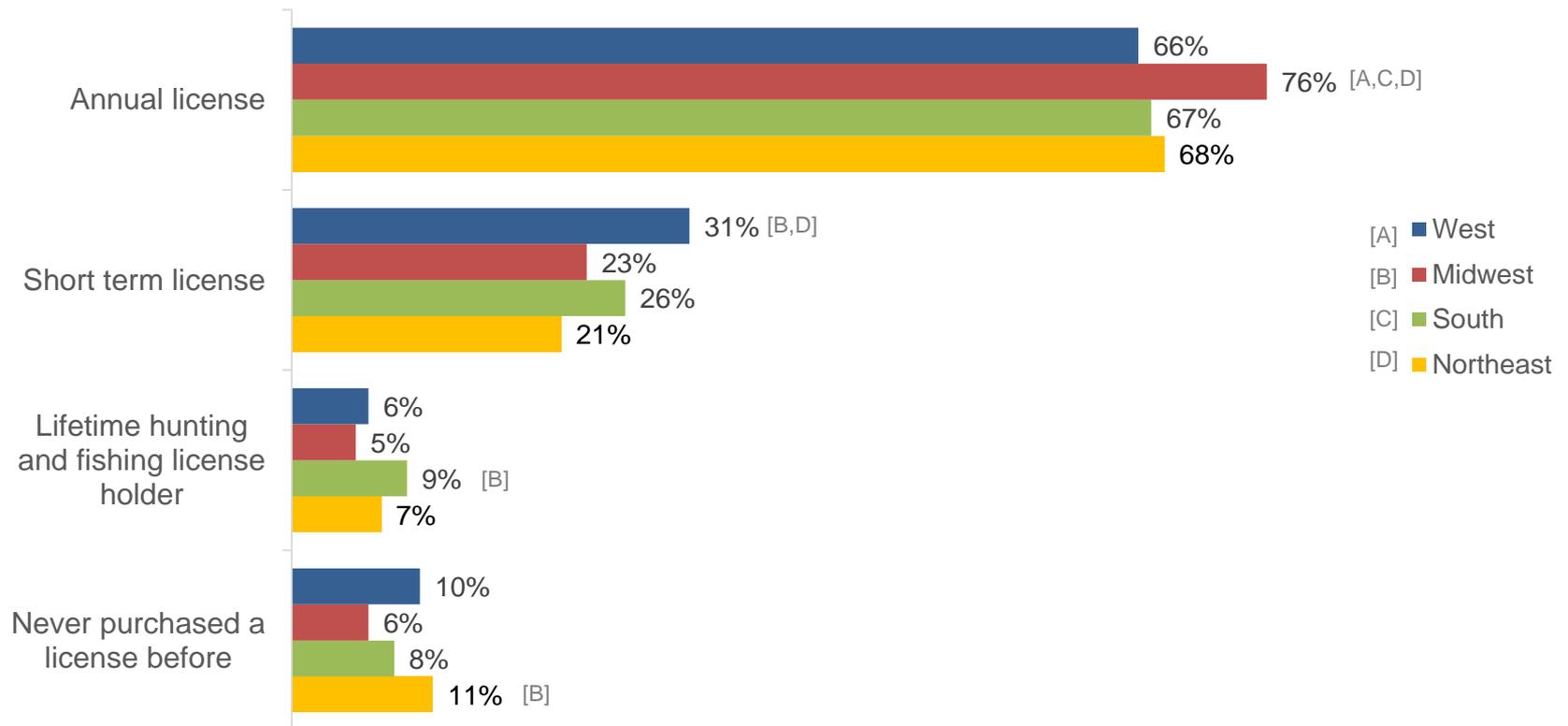


Totals equals more than 100%. Multiple responses allowed.

Q4a. How did you find out you needed a fishing/hunting license?
 Base=West (n=329), Midwest (n=376), South (n=593), Northeast (n=242)
 NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

While most have purchased a license in the past, annual licenses are significantly more likely to be purchased in the Midwest than any other region.

Past Fishing/Hunting License Purchase

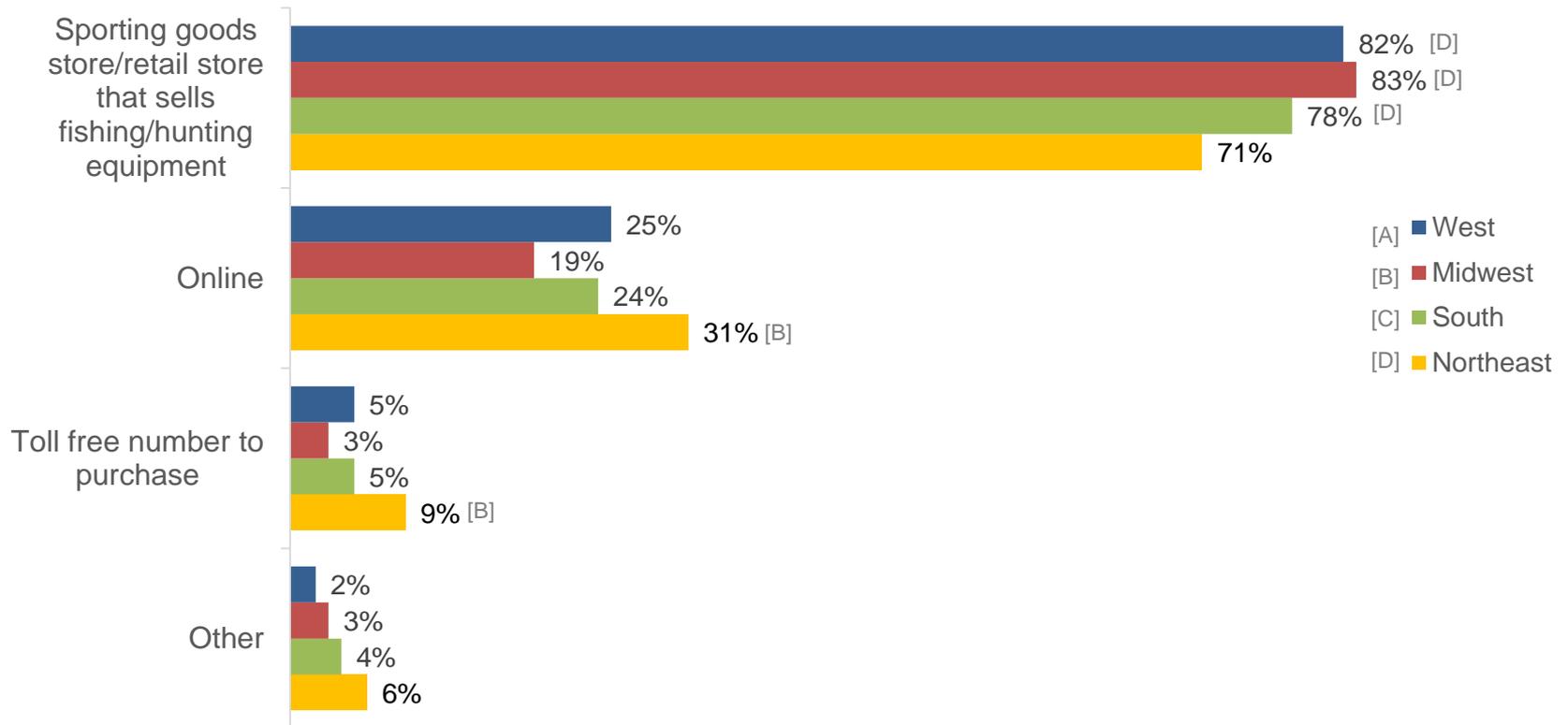


Totals equals more than 100%. Multiple responses allowed.

Q3. What kind of fishing/hunting license have you purchased in the past?
 Base=West (n=329), Midwest (n=376), South (n=593), Northeast (n=242)
 NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

Most think to purchase their license at a sporting goods store or retail store; the Northeast was significantly lower for sporting goods store/retail store, compared to the other regions.

Location of Fishing/Hunting License Purchase



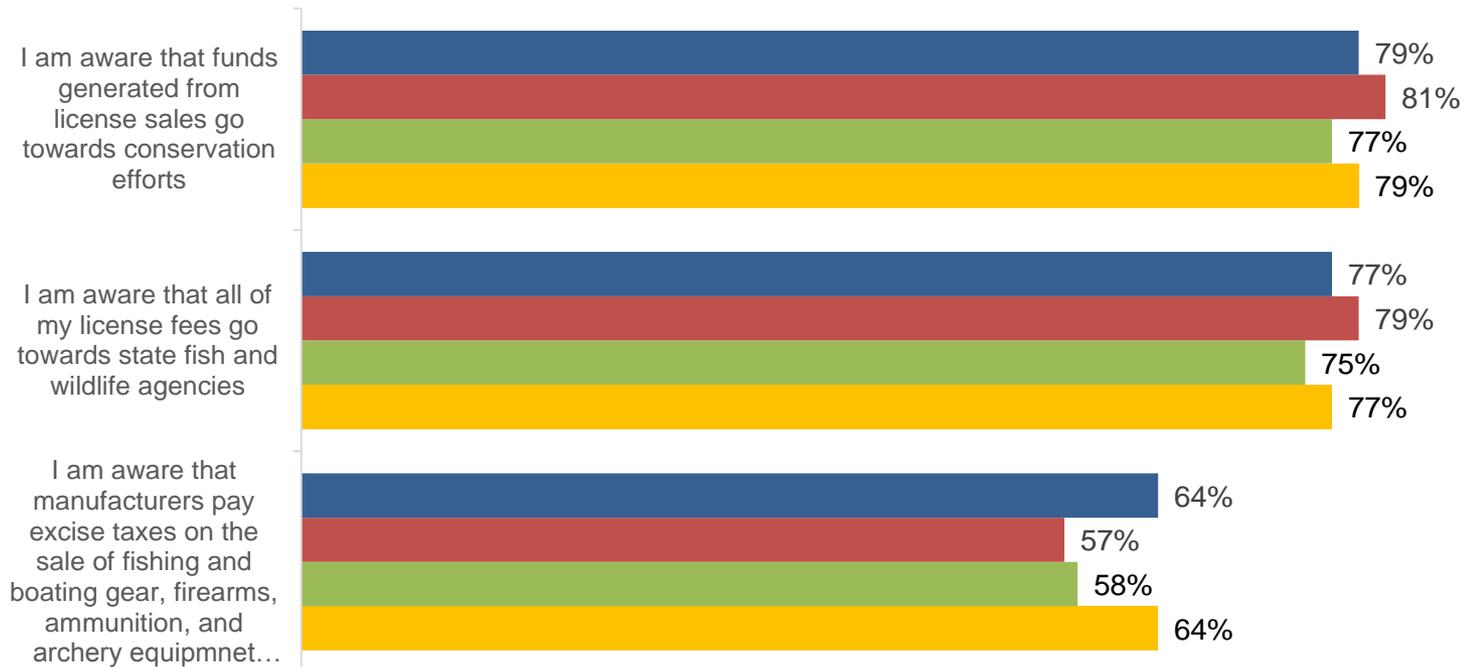
Totals equals more than 100%. Multiple responses allowed.

Q4. Where did you purchase your fishing/hunting license?
 Base=West (n=329), Midwest (n=376), South (n=593), Northeast (n=242)
 NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

No differences are seen by region: most are aware that license funds go towards conservation efforts.

Agreement Statements
T2B Scores: (Somewhat/Completely Agree)

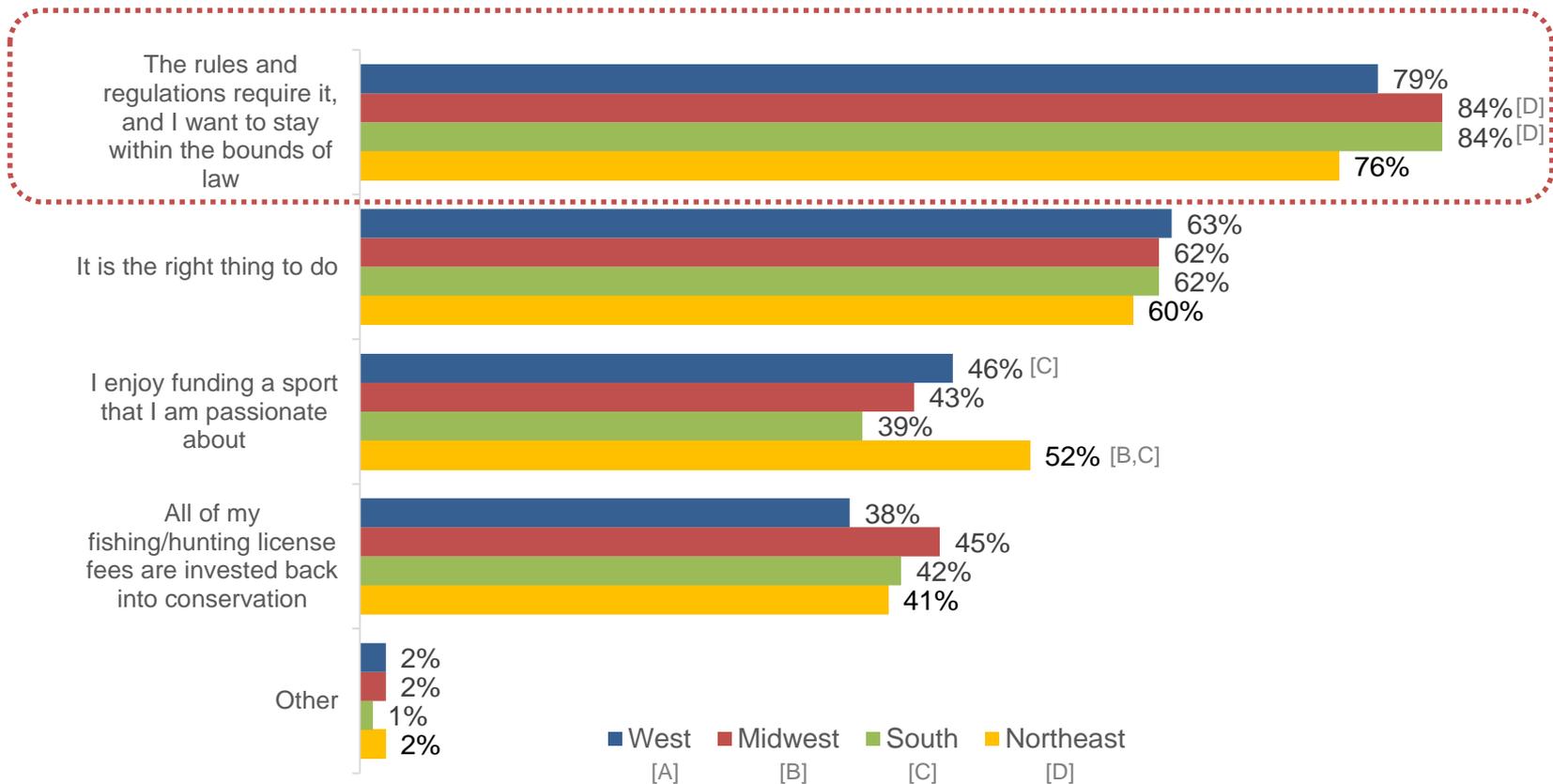
■ West ■ Midwest ■ South ■ Northeast



Q6. Before you go fishing and hunting, you do need a license. Please indicate how much you agree or disagree with each statement.
Base=West (n=329), Midwest (n=376), South (n=593), Northeast (n=242)

Regardless of region, most feel similarly on why they purchase a license, with the Midwest and the South being significantly more likely to purchase a license because it is the law.

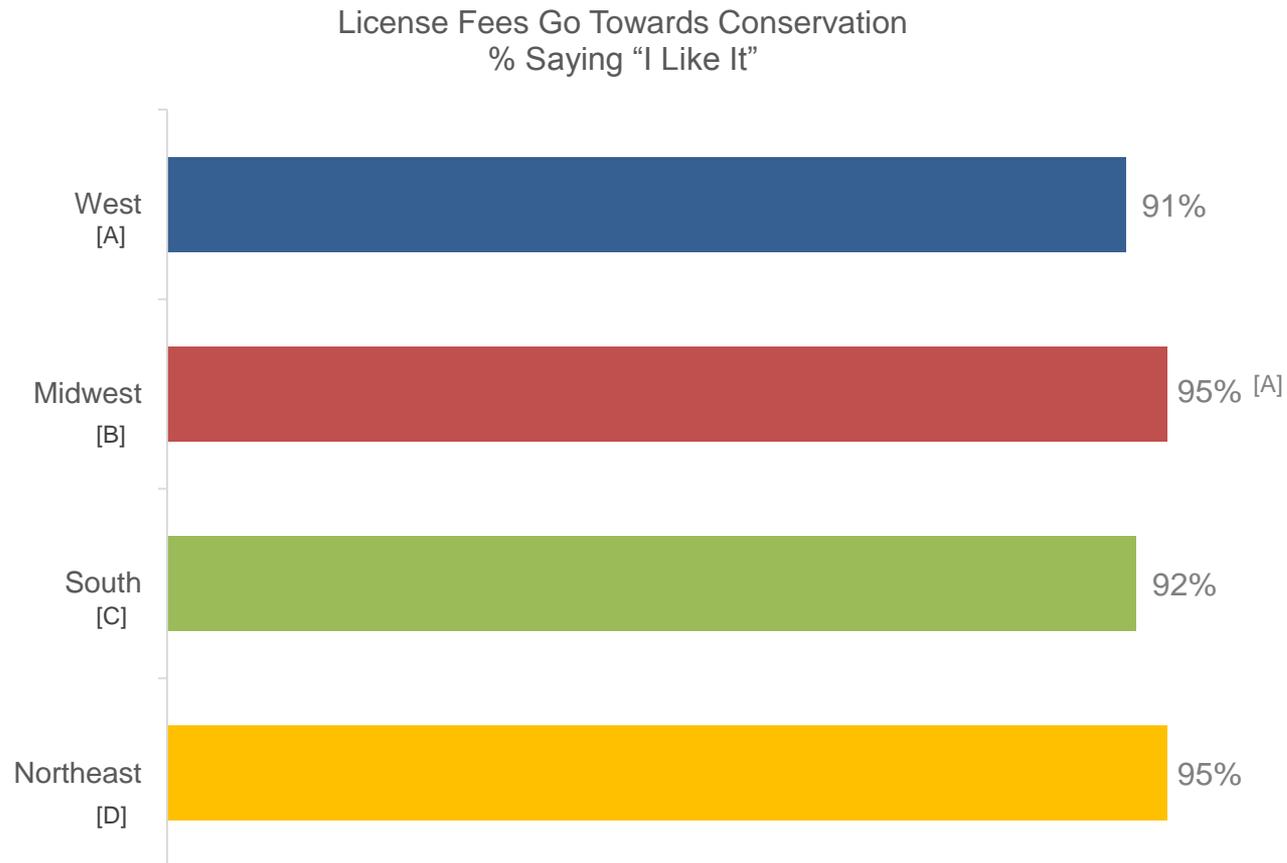
Reasons Purchased Fishing/Hunting License



Totals equals more than 100%. Multiple responses allowed.

Q7. Which of the following are reasons why you have purchased/would purchase a fishing/hunting license?
 Base=West (n=329), Midwest (n=376), South (n=593), Northeast (n=242)
 NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

The majority of all respondents like knowing their license fees go towards conservation. No real differences seen regionally.

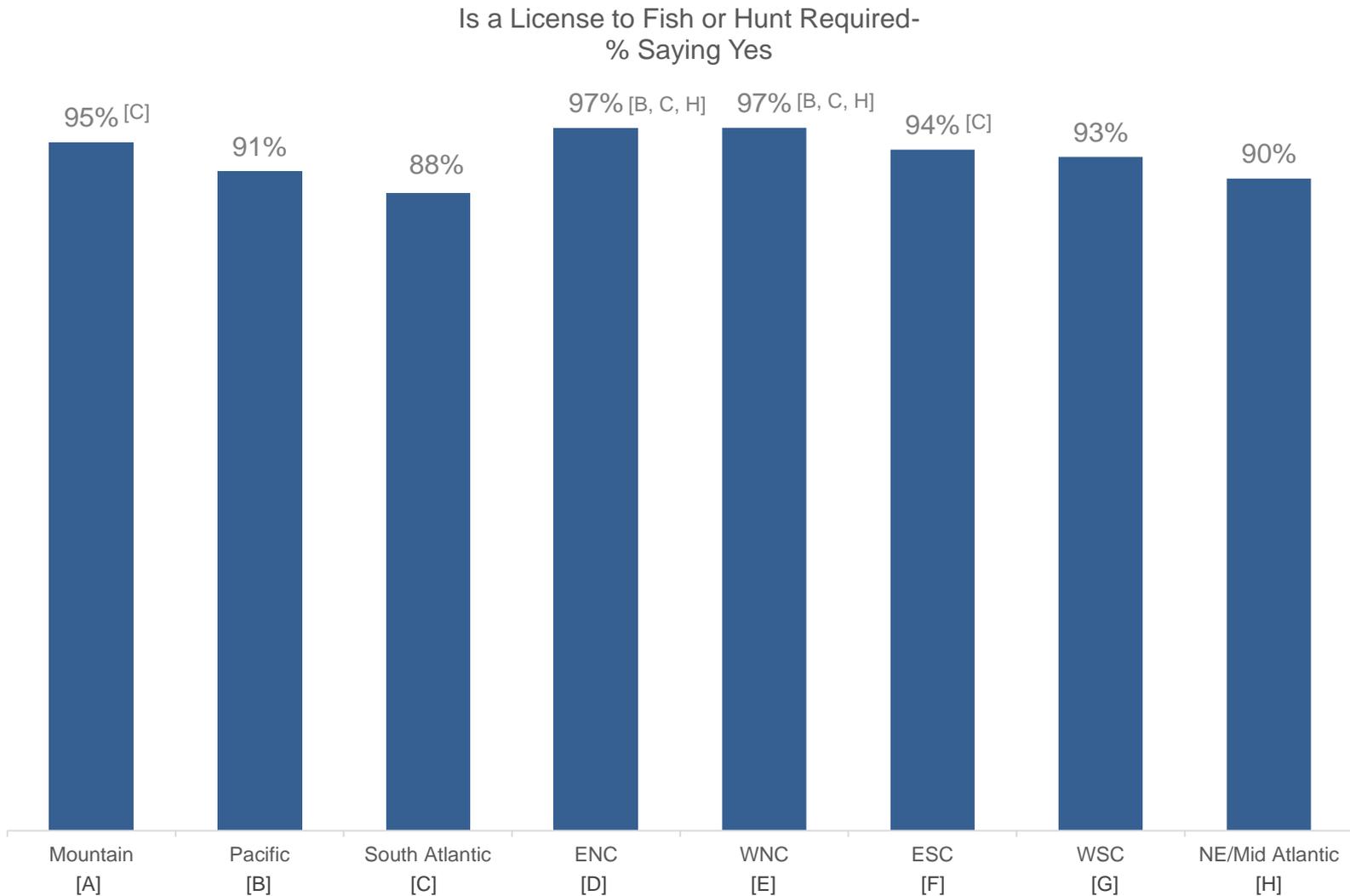


Q9. When you purchase a fishing/hunting license, all the fees go towards conservation. Knowing this, how do you feel about these efforts?

Base=West (n=329), Midwest (n=376), South (n=593), Northeast (n=242)

NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

The majority of respondents know they need a license to fish, or hunt. The East North Central and West North Central regions have slightly more awareness than the other regions.



Q2. Do you know if you need a license to fish, or hunt?

Base=Mountain (n=121), Pacific (n=208), South Atlantic (n=326), ENC (n=246), WNC (n=130), ESC (n=109), WSC (n=158), NE/Mid Atlantic (n=242)

NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

While most knew by general knowledge that they need a license to either fish or hunt, the regions of Mountain, East North Central, West North Central and West South Central were significantly higher than other regions for saying “general knowledge”.

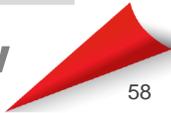
How They Learned A Fishing/Hunting License Was Needed

Region	Mountain [A]	Pacific [B]	S Atlantic [C]	ENC [D]	WNC [E]	ESC [F]	WSC [G]	NE/Mid Atlantic [H]
General Knowledge	71% [B, C, H]	54%	53%	70% [B, C, H]	75% [B, C, H]	65% [C]	69% [B, C, H]	56%
State fish and wildlife agency website	31%	37% [D,E]	37% [D,E]	26%	25%	32%	30%	35% [D,E]
Sporting good store/retail store that sells fishing/hunting equipment	17% [E]	26% [E]	21% [D,E]	14% [E]	5%	19% [E]	21% [E]	18% [E]
A friend	18%	23% [D]	25% [D,E]	15%	15%	16%	19%	23% [D,E]
External website	5%	8%	8%	4%	4%	6%	10% [D,E]	12% [A,D,E, F]

NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

Totals equals more than 100%. Multiple responses allowed.

Q4a. How did you find out you needed a fishing/hunting license?
 Base= License Holders: Mountain (n=110), Pacific (n=187), South Atlantic (n=293), ENC (n=230), WNC (n=123), ESC (n=106), WSC (n=149), NE/Mid Atlantic (n=215)



Mostly all respondents have purchased a license in the past; those in the East South Central region were particularly higher than most other regions for past license purchase.

Past Licenses Purchased

Region	Mountain [A]	Pacific [B]	S Atlantic [C]	ENC [D]	WNC [E]	ESC [F]	WSC [G]	NE/Mid Atlantic [H]
License Holder (Net)	91%	90%	90%	93%	95% [H]	97% [A, B, C, H]	94% [H]	89%
Annual license	68%	65%	63%	75% [B,C]	77% [B,C]	72%	71%	68%
Short term license	29%	32% [E, H]	26%	24%	20%	26%	25%	21%
Lifetime hunting and fishing license holder	7%	6%	10% [B, D]	4%	7%	11% [D]	6%	7%
Never purchased a license before	9% [F]	10% [F]	10% [F]	7%	5%	3%	6%	11% [E,F,G]

NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

Totals equals more than 100%. Multiple responses allowed.

Licenses are most commonly purchased at a sporting goods store/retail store; those located in the Mountain, Pacific, East North Central and West South Central and significantly more likely to purchase there than other regions.

Location of License Purchase

Region	Mountain [A]	Pacific [B]	S Atlantic [C]	ENC [D]	WNC [E]	ESC [F]	WSC [G]	NE/Mid Atlantic [H]
Sporting goods store/retail store that sells fishing/hunting equipment	84% [C,H]	81% [C,H]	74%	84% [C,H]	80% [H]	80%	85% [C,H]	71%
Online	27%	24%	27% [D,G]	18%	22%	24%	18%	31% [D,G]
Toll free number to purchase	5%	5%	6% [E]	3%	2%	3%	5%	9% [D,E,F]
Other	3%	2%	4%	2%	3%	7% [G]	1%	6% [G]

NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

Totals equals more than 100%. Multiple responses allowed.

Q4. Where did you purchase your fishing/hunting license?

Base= License Holders: Mountain (n=110), Pacific (n=187), South Atlantic (n=293), ENC (n=230), WNC (n=123), ESC (n=106), WSC (n=149), NE/Mid Atlantic (n=215)

Awareness levels of what license fees go towards are strong; the West North Central region had the highest scores for awareness.

Agreement Statements
(T2B: Somewhat/Completely Agree %)

Region	Mountain [A]	Pacific [B]	S Atlantic [C]	ENC [D]	WNC [E]	ESC [F]	WSC [G]	NE/Mid Atlantic [H]
I am aware that all of my license fees go towards state fish and wildlife agencies	82% [C]	75%	71%	77%	82% [C]	77%	82% [C]	77%
I am aware that funds generated from license sales go towards conservation efforts	83%	77%	75%	78%	85% [B,C]	77%	81%	79%
I am aware that manufacturers pay excise taxes on the sale of fishing and boating gear, firearms, ammunition and archery equipment that go towards conservation efforts	68% [C,D,F]	61%	58%	54%	62%	53%	61%	64% [D]

NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

The West North Central, East South Central and West South Central regions had stronger scores for conservation being the reason they purchase a license.

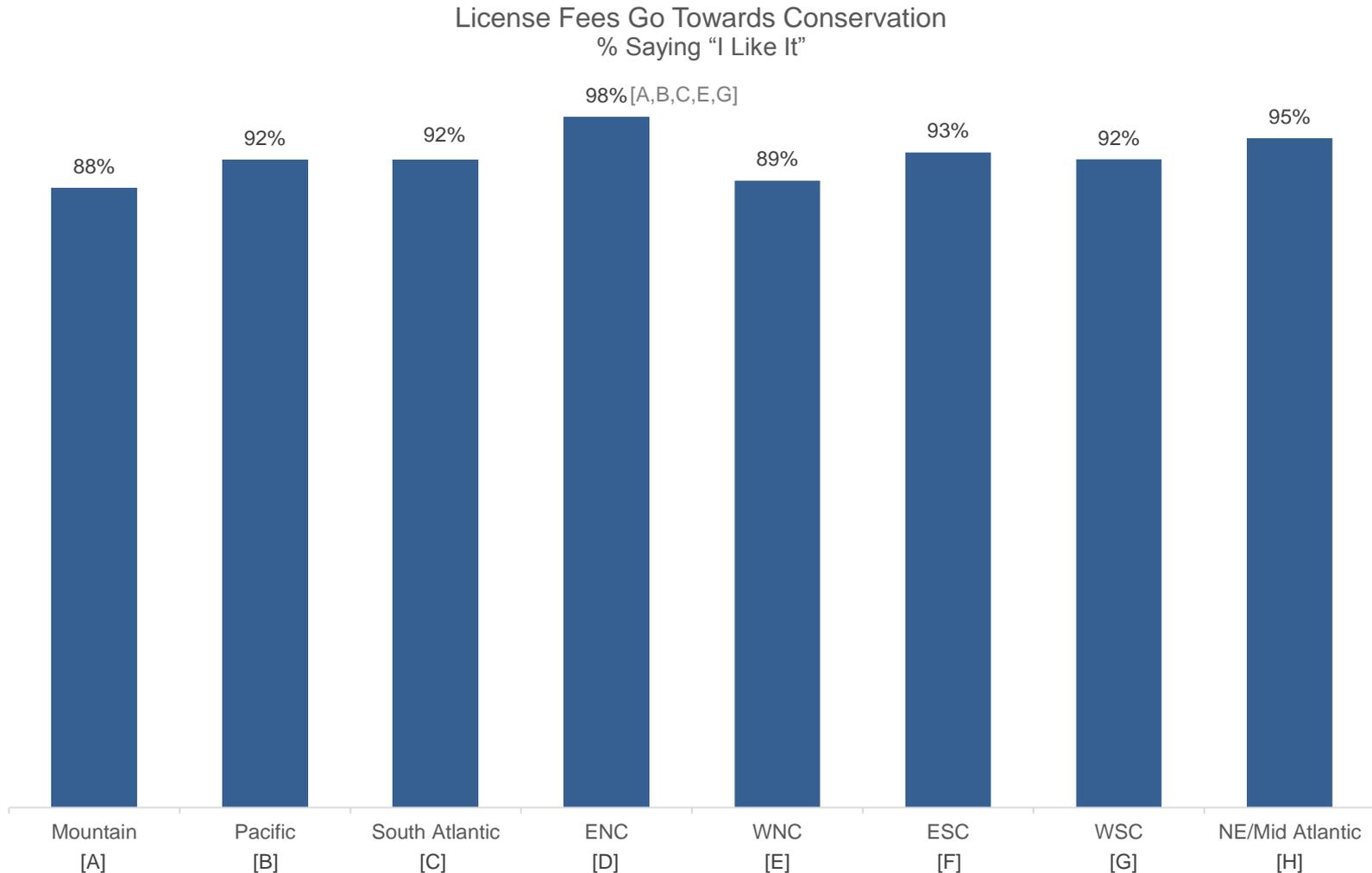
Reasons Purchased a License

Region	Mountain [A]	Pacific [B]	S Atlantic [C]	ENC [D]	WNC [E]	ESC [F]	WSC [G]	NE/Mid Atlantic [H]
The rules and regulations require it, and I want to stay within the bounds of law	82%	78%	83% [H]	83%	86% [B,H]	88% [B,H]	85% [H]	76%
It is the right thing to do	64%	62%	60%	61%	62%	61%	66%	60%
I enjoy funding a sport that I am passionate about	45%	47% [C]	36%	40%	48% [C]	47%	40%	52% [C,D,G]
All of my fishing/hunting license fees are invested back into conservation	43%	35%	38%	41%	51% [B,C]	51% [B,C]	45% [B]	41%
Other	3%	2%	1%	2%	2%	2%	2%	2%

NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.

Totals equals more than 100%. Multiple responses allowed.

The majority of respondents like knowing their license fees go towards conservation; those located in the East North Central region are more likely than most other regions to like this.



Q9. When you purchase a fishing/hunting license, all the fees go towards conservation. Knowing this, how do you feel about these efforts?
Base=Mountain (n=121), Pacific (n=208), South Atlantic (n=326), ENC (n=246), WNC (n=130), ESC (n=109), WSC (n=158), NE/Mid Atlantic (n=242)
NOTE: Capital letters in [] denote statistical significance at the 95% confidence level.



04

Appendices

- RBFF
- + Segments
- + Beginner vs. Avid
- + Boaters
- + Hispanic

RBFF: Family Outdoors vs. Outdoor Enthusiasts

01

When asked the reasons why they fish, respondents categorized as Family Outdoors were significantly more likely to fish for “family reasons” than those categorized as Outdoor Enthusiasts. (i.e. to spend time with their family (80% vs. 54%), because their children asked them to (47% vs. 17%), to continue the tradition passed down by family members (43% vs. 31%); the same was true of Outdoor Enthusiasts: they were significantly more likely to fish for reasons other than family (i.e. easily accessible (44% vs. 36%), like to catch own food (35% vs. 27%), enjoy the solitude (53% vs. 39%).)

02

While most Family Outdoors and Outdoor Enthusiasts know you need a license to fish and have purchased one in the past, Outdoor Enthusiasts are significantly more likely to have purchased a license (95% vs. 91%), especially annual licenses (76% vs. 68%) and Lifetime licenses (9% vs. 4%).

03

The majority of both Family Outdoors and Outdoor Enthusiasts both correctly understand that their license fees go towards conservation, but Outdoor Enthusiasts were significantly more likely to be aware of this than Family Outdoors:

- awareness that funds generated from license sales go towards conservation (79% vs. 71%)
- awareness that all license fees go towards state fish and wildlife agencies (76% vs. 69%)
- awareness of manufacturers paying excise taxes on the sale of fishing/boating gear and equipment that go towards conservation efforts (56% vs. 48%).

04

While most purchase licenses because it is the law (and of those, Family Outdoors are significantly more likely to say this (87% vs. 79%), Outdoor Enthusiasts are significantly more likely to purchase a license to support a sport they are passionate about (47% vs. 28%) and because the fees go towards conservation (42% vs. 35%).

05

Both groups equally like knowing that their license funds go towards conservation as both care about healthy fish populations and want to protect and preserve their waterways.

RBFF: Family Outdoors vs. Outdoor Enthusiasts

06

Demographic Differences

There was significantly more female Family Outdoors and significantly more male Outdoor Enthusiasts (74% female/26% male Family Outdoors; 46% female/54% male Outdoor Enthusiasts).

Family Outdoors also had significantly more younger respondents, while the Outdoor Enthusiasts had significantly more older respondents: 70% of Family Outdoors were younger than 45 years of age (compared to 40% of Outdoor Enthusiasts); 60% of Outdoor Enthusiasts were 45 or older (compared to only 30% of Family Outdoors).

There was significantly more Family Outdoors in the South (45% vs. 34%) and significantly more Outdoor Enthusiasts in the Northeast (21% vs. 10%).

Family Outdoors were significantly more likely to be married (86% vs. 72%), while Outdoor Enthusiasts were significantly more likely to be single (14% vs. 4%)

Outdoor Enthusiasts are significantly more likely to participate in Boating (48% vs. 31%), Recreational Shooting (26% vs. 18%) and Hunting (34% vs. 18%). They are also more likely to own a boat (69% vs. 48%).

Most respondents are employed; however, Outdoor Enthusiasts were significantly more likely to have retirees (22% vs. 3%) and less likely to have homemakers (6% vs. 28%).

There were no differences between Family Outdoors and Outdoor Enthusiasts among race/ethnicity, income and education.

RBFF: Beginner/Intermediate Anglers vs. Avid Anglers

01

Beginner/Intermediate Anglers are significantly more likely to say they fish because of family reasons: my children asked me to take them (33% vs. 25%) and I wanted to take my children (48% vs. 41%). Avid Anglers are significantly more likely to fish for other reasons besides family: for the excitement and adventure (57% vs. 40%), because it is easily accessible (52% vs. 35%), like to catch own food (39% vs. 28%), enjoyment of the solitude (58% vs. 42%), a good way to promote conservation (22% vs. 12%), having participated as a child (63% vs. 54%), gives them an opportunity to “unplug” (58% vs. 50%), and spending time outdoors (87% vs. 78%).

02

While most know you need a license to fish, Avid Anglers are significantly more likely to say they know over Beginner/Intermediate Anglers (94% vs. 91%); Avid Anglers are also significantly more likely to have purchased a license (99% vs. 91%), especially annual licenses (85% vs. 67%) and Lifetime licenses (12% vs. 4%). Beginner/Intermediate Anglers are significantly more likely to have purchased a short term license (27% vs. 15%).

03

When asked where their license fees go, the most commonly given top of mind answer was conservation; however, Avid Anglers are significantly more likely to say this (51% vs. 42%). Beginner/Intermediates were significantly more likely to say they didn't know where the fees go (27% vs. 17%).

Avid Anglers were also significantly more likely to agree that their fees go towards conservation when directly asked:

- awareness that funds generated from license sales go towards conservation (85% vs. 71%)
- awareness that all license fees go towards state fish and wildlife agencies (79% vs. 70%)
- awareness of manufacturers paying excise taxes on the sale of fishing/boating gear and equipment that go towards conservation efforts (61% vs. 48%).

04

While most purchase licenses because it is the law, Avid Anglers are significantly more likely to purchase a license to support a sport they are passionate about (53% vs. 31%) and because the fees go towards conservation (47% vs. 35%).

RBFF: Beginner/Intermediate Anglers vs. Avid Anglers

05

Both groups equally like knowing that their license funds go towards conservation as both care about healthy fish populations and want to protect and preserve their waterways. Avid Anglers were significantly more likely to say they care about healthy fish populations and public access to fishing opportunities (98% vs 95%).

06

Demographic Differences

There was significantly more female Beginner/Intermediate Anglers and significantly more male Avid Anglers (66% female/34% male Beginner/Intermediate; 43% female/57% male Avid).

The Beginner/Intermediates were also significantly more younger respondents, while the Avids had significantly more older respondents: <45 years: Beginner/Intermediate (59%); Avid (43%); 45+: Beginner (41%); Avid (57%).

There was significantly more Beginner/Intermediates in the West (23% vs. 12%) and significantly more Avids in the Northeast (25% vs. 12%).

Beginner/Intermediate Anglers were significantly more likely to have children under 18 years of age (72% vs. 52%) and are significantly more likely to participate in outdoor activities with these young children (69% vs. 46%).

Avid Anglers participate in outdoor activities more often than Beginner/Intermediate Anglers, and also participate in more activities than Beginner/Intermediates. They are also significantly more likely own a boat (76% vs. 50%).

Avid Anglers were also significantly more likely to have higher household incomes (57% vs. 50% were \$75K or more); they were also significantly more likely to have retirees (21% vs. 10%) and less likely to have homemakers or part-time workers.

RBFF: Boaters vs. Non Boaters

01

When asked the reasons why they fish, respondents categorized as Boaters were significantly more likely to fish for a variety of reasons than respondents categorized as Non Boaters:

- Because it offers adventure and excitement: 56% vs 42%
- Because it allows them to spend time with family: 72% vs. 63%
- Because they like to catch their own food: 48% vs. 26%
- Because they enjoy the solitude: 54% vs. 45%
- Because it is a good way to promote conservation: 27% vs. 12%

02

Boaters were significantly more likely to have purchased a license (98% vs. 92%), especially an annual license (85% vs. 69%). Non Boaters were significantly more likely to have purchased short term licenses (26% vs. 14%).

03

Boaters were significantly more likely to be aware that license fees go towards conservation:

- Funds generated from license sales go towards conservation (84% vs. 73%)
- All license fees go towards state fish and wildlife agencies (81% vs. 70%)

04

While most purchase licenses because it is the law, Boaters were significantly more likely to purchase a license to support a sport they are passionate about (48% vs. 35%) and because the fees go towards conservation (48% vs. 35%).

05

Both groups equally like knowing that their license funds go towards conservation as both care about healthy fish populations and want to protect and preserve their waterways; however, Boaters were significantly more likely to say they are passionate about conservation (87% vs. 78%).

RBFF: Boaters vs. Non Boaters

06

Demographic Differences

There were no gender differences between Boaters and Non Boaters, but Boaters were significantly more likely to be older respondents (45+: Boaters (53%); Non Boaters (44%).

The Beginner/Intermediates were also significantly more younger respondents, while the Avid's had significantly more older respondents: <45 years: Beginner/Intermediate (59%); Avid (43%); 45+: Beginner (41%); Avid (57%).

There was significantly more Boaters in the Midwest (33% vs. 23%); no other regional differences were found.

Boaters were significantly more likely to be Caucasian than Non Boaters (91% vs. 86%).

Boaters participate in outdoor activities more often than Non Boaters, participate more often with their spouse/significant other, and also participate in more activities than Non Boaters. They were also significantly more likely to be classified as Outdoor Enthusiasts (74% vs. 48%) and Avid Anglers (56% vs. 24%).

Boaters were significantly more likely to have higher household incomes (60% vs. 50% were \$75K or more); they were also significantly more likely to have retirees (19% vs. 12%) and less likely to be homemakers.

RBFF: Profile of Hispanics

01

When asked the reasons why they fish, respondents felt similarly regardless of ethnicity; the only difference was with the reason “I wanted to try a new hobby”: 22% of Hispanics cited this, while only 10% of Non-Hispanics chose this.

02

Overall, respondents know you need a license to fish and have purchased one in the past, regardless of ethnicity. Hispanics are however, significantly more likely to have purchased their license from a toll free number (13% vs. 4%), and a sporting goods store/retail store (90% vs. 78%). They were also significantly more likely to find out they needed a license through this sporting goods store/retail store (35% vs. 17%).

03

Both Hispanics and Non-Hispanics equally like knowing that their license funds go towards conservation as both care about healthy fish populations and want to protect and preserve their waterways; however, Hispanics were significantly more likely to say they are passionate about conservation (89% vs. 80%).

04

Demographic Differences

There were a significantly more males that made up Hispanics (55% vs. 40%); They were also significantly more younger respondents (88% vs. 51% were <45 years of age).

There was significantly more Hispanics in the West (44% vs. 17%) and significantly less in the South (20% vs. 40%); no other regional differences were found.

Hispanics were significantly more likely to have children under the age of 18 (80% vs. 64%).

Hispanics participate in outdoor activities more often than Non-Hispanics, and also participate in more activities.

Hispanics are significantly more likely to be employed than Non-Hispanics (83% vs. 65%).

RBFF: Male Anglers vs. Female Anglers

01

Female Anglers are significantly more likely to say they fish because of family or social reasons: It allows me to spend time with my family (75% vs. 52% of males), my children asked me to take them (36% vs. 23%), a friend or relative invited me to join them (25% vs. 20%), to continue the tradition passed down by family members (40% vs. 31%), and I wanted to take my children (53% vs. 36%). Females were also more likely to fish because they wanted to try a new hobby and because it is a low cost activity. Male Anglers are significantly more likely to fish for other reasons besides family: for the excitement and adventure (50% vs. 42%), like to catch own food (36% vs. 28%), and enjoyment of the solitude (54% vs. 42%).

02

While most know you need a license to fish, Male Anglers are significantly more likely to have purchased a license (97% vs. 91%), especially annual licenses (77% vs. 69%) and Lifetime licenses (9% vs. 5%). Female Anglers are significantly more likely to have purchased a short term license (27% vs. 19%).

03

When asked where their license fees go, the most commonly given top of mind answer was conservation; however, Males are significantly more likely to say this; Females were significantly more likely to say they didn't know where the fees go (29% vs. 17%).

Male Anglers were also significantly more likely to agree that their fees go towards conservation when directly asked:

- awareness that funds generated from license sales go towards conservation (80% vs. 72%)
- awareness that all license fees go towards state fish and wildlife agencies (77% vs. 69%)
- awareness of manufacturers paying excise taxes on the sale of fishing/boating gear and equipment that go towards conservation efforts (61% vs. 46%).

04

While most purchase licenses because it is the law, Female Anglers are significantly more likely to say this (85% vs. 80% of males).

RBFF: Male Anglers vs. Female Anglers

05

Both groups equally like knowing that their license funds go towards conservation as both care about healthy fish populations and want to protect and preserve their waterways. Female Anglers were significantly more likely to say conservation meant protection (25% vs 18%), and saving (19% vs. 13%), while Male Anglers were significantly more likely to say sustainability (13% vs. 8%).

Demographic Differences

06

Females had significantly more younger respondents, while the Males had significantly more older respondents: <45 years: Females (63%) and Males (41%); 45+: Females (37%) and Males (59%).

Males were significantly more likely to be Hispanic/Latino (11% vs. 6%).

Female Anglers were significantly more likely to have children under 18 years of age (75% vs. 52%) and are significantly more likely to participate in outdoor activities with these young children (73% vs. 47%). They are also significantly more likely over Males to say they participate with their spouses, and other family members, while Males are significantly more likely to say they participate in outdoor activities with friends (62% vs 47%) or alone (4% vs. 1%).

Male Anglers participate in outdoor activities more often than Female Anglers, and are more likely to participate in Shooting and Hunting over Females (27% vs. 20% for shooting and 38% vs. 18% for hunting). They are also significantly more likely own a boat (71% vs. 55%).

Females were significantly more likely to be categorized as Family Outdoors (57% vs. 29%) and Beginner/Intermediate Anglers (77% vs. 56%), while Males were categorized significantly more as Outdoor Enthusiasts (71% vs. 43%) and Avid Anglers (44% vs. 23%).

Male Anglers were also significantly more likely to have higher household incomes (60% vs. 47% were \$75K or more) while Females had lower household incomes; they were also significantly more likely to be employed 73% versus 61% of females) and have at least a college degree (63% vs. 52% of females).



04

Appendices

- CAHSS
- + Segments
- + Beginner vs. Avid

CAHSS: Family Outdoors vs. Outdoor Enthusiasts

01

When asked the reasons why they hunt, respondents categorized as Outdoor Enthusiasts were significantly more likely to hunt for a variety of reasons more than Family Outdoor, including “a good way to promote conservation” (34% vs. 17%), “enjoy spending time outdoors” (80% vs. 67%), and “it offers adventure and excitement” (64% vs. 52%).

02

While most Family Outdoors and Outdoor Enthusiasts know you need a license to hunt and have purchased one in the past, Outdoor Enthusiasts are significantly more likely to have purchased a license (92% vs. 87%), especially annual licenses (69% vs. 58%). Short term licenses were significantly more likely to have been purchased by Family Outdoors (33% vs. 23%). Outdoor Enthusiasts were also more likely to know they needed a license through general knowledge than Family Outdoors (67% vs. 57%).

03

The majority of both Family Outdoors and Outdoor Enthusiasts both correctly understand that their license fees go towards conservation, but Outdoor Enthusiasts were significantly more likely to be aware of this than Family Outdoors:

- more likely to mention top of mind that license fees go towards conservation (53% vs. 42%).
- awareness that funds generated from license sales go towards conservation (86% vs. 77%)
- awareness that all license fees go towards state fish and wildlife agencies (84% vs. 77%)
- awareness of manufacturers paying excise taxes on the sale of firearms, ammunition, and archery equipment that go towards conservation efforts (71% vs. 63%).

04

While most purchase licenses because it is the law, Outdoor Enthusiasts are significantly more likely to purchase a license because the fees go towards conservation (48% vs. 41%).

05

Both groups equally like knowing that their license funds go towards conservation as both care about healthy wildlife populations and want to protect and preserve it.

CAHSS: Family Outdoors vs. Outdoor Enthusiasts

06

Demographic Differences

There was significantly more female Family Outdoors and significantly more male Outdoor Enthusiasts (56% female/44% male Family Outdoors; 41% female/59% male Outdoor Enthusiasts).

Family Outdoors also had significantly more younger respondents, while the Outdoor Enthusiasts had significantly more older respondents: the average age of a Family Outdoor respondents was 36 years of age and the average age of a Outdoor Enthusiast respondents was 44 years of age.

Family Outdoors were significantly more likely to be married (84% vs. 73%), while Outdoor Enthusiasts were significantly more likely to be single (12% vs. 4%)

Most respondents are employed; however, Outdoor Enthusiasts were significantly more likely to have retirees (16% vs. 2%) and less likely to have homemakers (8% vs. 18%).

There were no differences between Family Outdoors and Outdoor Enthusiasts among region, race/ethnicity, income and education.

CAHSS: Beginner/Intermediate Shooters vs. Avid Shooters

01

Avid Shooters are significantly more likely to say they hunt for several reasons more than Beginner/Intermediate Shooters: they like the adventure and excitement it offers (71% vs. 50%), they like to harvest their own food (45% vs. 22%), they enjoy the solitude (44% vs. 29%), they think it is a good way to promote conservation (39% vs. 18%), they participated as a child (44% vs. 34%), they want to keep the tradition alive that was passed down by family (42% vs. 30%), they like that it lets them “unplug” (55% vs. 41%), they like spending time outdoors (85% vs. 66%).

02

While most know you need a license to hunt, Avid Shooters are significantly more likely to have purchased a license in the past (89% vs. 77%), especially annual licenses (69% vs. 48%). Beginner/Intermediate Shooters are significantly less likely to have purchased a license (23% vs. 11%). Respondents knew they needed a license mostly by either general knowledge or state fish/wildlife agency websites; however, Beginner/Intermediate Shooters were significantly more likely to say they found out through a friend than Avid Shooters (30% vs. 14%).

03

When asked where their license fees go, the most commonly given answer was conservation; however, Avid Shooters are significantly more likely to say this (60% vs. 39%). Beginner/Intermediates were significantly more likely to say they didn't know where the fees go (22% vs. 13%).

Avid Shooters were also significantly more likely to agree that their fees go towards conservation when directly asked:

- awareness that funds generated from license sales go towards conservation (90% vs. 77%)
- awareness that all license fees go towards state fish and wildlife agencies (84% vs. 76%)
- awareness of manufacturers paying excise taxes on the sale of gear and equipment that go towards conservation efforts (74% vs. 65%).

CAHSS: Beginner/Intermediate Shooters vs. Avid Shooters

04

While most purchase licenses because it is the law, Avid Shooters are significantly more likely to purchase a license to support a sport they are passionate about (55% vs. 41%).

05

Both groups equally like knowing that their license funds go towards conservation as both care about healthy wildlife populations and want to protect and preserve it.

06

Demographic Differences

There was significantly more female Beginner/Intermediate Shooters and significantly more male Avid Shooters (55% female/45% male Beginner/Intermediate; 40% female/60% male Avid).

The Beginner/Intermediates also had more younger respondents, while the Avid's had significantly more older respondents: the average age of a Beginner/Intermediate was 39 years of age and Avid was 44 years of age.

Beginner/Intermediate Shooters were significantly more likely to be married (83% vs. 69%) with kids (88% vs. 43%), and are significantly more likely to participate in outdoor activities with these young children (85% vs. 34%) or their spouses (83% vs. 67%). 99% of Beginner/Intermediate Shooters also say they participate in outdoor activities to spend time with their families, significantly higher than Avid Shooters (99% vs. 89%). Avid Shooters were significantly more likely to be single (13% vs. 4%)

Avid Shooters participate in outdoor activities more often than Beginner/Intermediate Shooters, and also participate in hunting more than Beginner/Intermediates (59% vs. 32%).

Avid Shooters were significantly more likely to have retirees (17% vs. 8%) and less likely to have homemakers (4% vs. 17%).

There were no differences between Beginner/Intermediate and Avid Shooters among region, race/ethnicity, income and education.

CAHSS: Male Shooters vs. Female Shooters

01

While most shoot because they enjoy spending time outdoors and the excitement and adventure it offers, Female Shooters are significantly more likely to say they shoot because of family or social reasons: It allows me to spend time with my family (68% vs. 42% of males), my children asked me to take them (23% vs. 15%), and a friend or relative invited me to join them (41% vs. 25%). Females were also more likely to shoot because they wanted to try a new sport (22% vs. 12% of males). Male Shooters are significantly more likely to shoot for other reasons besides family: because they participated as a child (46% vs. 31%) and enjoyment of the solitude (42% vs. 30%).

02

While most know you need a license to shoot, Male Shooters are significantly more likely to have purchased a license (88% vs. 77%), especially annual licenses (65% vs. 51%).

03

When asked where their license fees go, the most commonly given top of mind answer was conservation; however, Males are significantly more likely to say this; Females were significantly more likely to say they didn't know where the fees go (26% vs. 11%).

Male Shooters were also significantly more likely to agree that their fees go towards conservation when directly asked:

- awareness that funds generated from license sales go towards conservation (90% vs. 75%)
- awareness of manufacturers paying excise taxes on the sale of gear and equipment that go towards conservation efforts (75% vs. 63%).

04

While most purchase licenses because it is the law, Male Shooters are significantly more likely to say they purchase a license because they enjoy funding sport they are passionate about (53% vs. 41% of females).

05

Both groups equally like knowing that their license funds go towards conservation as both care about healthy wildlife populations and want to protect and preserve the wildlife. Female Shooters were significantly more likely to think that there is no enough education on conservation (86% vs. 68% of males).

CAHSS: Male Shooters vs. Female Shooters

06

Demographic Differences

Females had significantly more younger respondents, while the Males had significantly more older respondents: the average age of a Female Shooter was 37 years of age and the average age of a Male Shooter was 45 years of age.

The only significant difference by region was Males were higher in the Northeast (23% vs. 9% of females).

Roughly three-quarters of male and female shooters are married; however, Female Shooters were significantly more likely to say they were not married but living with significant other (9% vs. 3% of males). Females were significantly more likely to have children under 18 (77% vs. 55% of males), and are significantly more likely to participate in outdoor activities with these young children (70% vs. 51%). They are also significantly more likely over Males to say they participate with their spouses, and other family members, while Males are significantly more likely to say they participate in outdoor activities with friends (66% vs 51%) or alone (5% vs. 1%).

Male Shooters participate in outdoor activities more often than Female Shooters (94% vs. 84%), and are more likely to participate in Hunting over Female Shooters (50% vs. 40%).

Females were significantly more likely to be categorized as Family Outdoors (50% vs. 35% of males) and Beginner/Intermediate Shooters (59% vs. 44%), while Males were categorized significantly more as Outdoor Enthusiasts (65% vs. 50% of females) and Avid Shooters (56% vs. 41%).

Male Shooters were also significantly more likely to have higher household incomes, while Female Shooters had lower household incomes; they were also significantly more likely to be employed (80% versus 66% of females); Females were significantly less likely to have a college degree (50% had less than a college degree vs. 30% of males).

CAHSS: Beginner/Intermediate Hunters vs. Avid Hunters

- 01 Avid Hunters are significantly more likely to say they hunt for several reasons more than Beginner/Intermediate Hunters: they like the adventure and excitement it offers (64% vs. 51%), they enjoy the solitude (44% vs. 30%), they think it is a good way to promote conservation (31% vs 20%), they participated as a child (42% vs. 30%), they want to keep the tradition alive that was passed down by family (49% vs. 35%), they like that it lets them “unplug” (45% vs. 30%), they like spending time outdoors (80% vs. 69%).
- 02 While most Hunters know you need a license to hunt, both Beginners/Intermediates and Avids have equally purchased a license in the past; however, Beginner/Intermediate Hunters are significantly more likely to have purchased a short term license (35% vs. 24%), while Avid Hunters are significantly more likely to have purchased a Lifetime license (9% vs. 2%). Respondents knew they needed a license mostly by either general knowledge or state fish/wildlife agency websites; however, Avid Hunters were significantly more likely to say they found out through a sporting goods store/retail store (23% vs. 12%).
- 03 The majority of both Beginner/Intermediate and Avid Hunters correctly understand that their license fees go towards conservation, but Avid Hunters were significantly more likely to be aware of this than Beginner/Intermediates:
 - awareness that funds generated from license sales go towards conservation (86% vs. 77%)
 - awareness of manufacturers paying excise taxes on the sale of gear and equipment that go towards conservation efforts (73% vs. 58%).
- 04 While most purchase licenses because it is the law, Avid Hunters are significantly more likely to purchase a license because they know that the fees are invested back into conservation (52% vs. 40%).

CAHSS: Beginner/Intermediate Hunters vs. Avid Hunters

05

Both groups equally like knowing that their license funds go towards conservation as both care about healthy wildlife populations and want to protect and preserve it.

06

Demographic Differences

There was significantly more female Beginner/Intermediate Hunters and significantly more male Avid Hunters (53% female/47% male Beginner/Intermediate; 41% female/59% male Avid).

The Beginner/Intermediates also had more younger respondents, while the Avid's had significantly more older respondents: the average age of a Beginner/Intermediate was 38 years of age and Avid was 42 years of age.

Beginner/Intermediate Hunters were significantly more likely to be married (82% vs. 75%) with kids (89% vs. 56%), and are significantly more likely to participate in outdoor activities with these young children (85% vs. 44%). 99% of Beginner/Intermediate Hunters also say they participate in outdoor activities to spend time with their families, significantly higher than Avid Hunters (99% vs. 89%). Avid Hunters were significantly more likely to be single (12% vs. 6%) and participate in outdoor activities to build expertise (80% vs. 61%), for the experience and excitement (99% vs. 92%) and for the solitude (69% vs. 59%).

Avid Hunters participate in outdoor activities more often than Beginner/Intermediate Hunters, and also participate in outdoors sports, including Recreational Shooting, more than Beginner/Intermediates (34% vs. 23%).

The majority of Hunters are employed; however, Avid Hunters were significantly more likely to have retirees than Beginner/Intermediate Hunters (13% vs. 3%).

There were no differences between Beginner/Intermediate and Avid Hunters among region, race/ethnicity, income and education.

CAHSS: Male Hunters vs. Female Hunters

01

While most hunt because they enjoy spending time outdoors and the excitement and adventure it offers, Female Hunters are significantly more likely to say they hunt because it “allows me to spend time with my family” (57% vs. 36% of males), while Male Hunters are significantly more likely to hunt because they enjoy the solitude (45% vs. 29%), it is a good way to promote conservation (31% vs. 22%), and they went as a part of a vacation or group outing (16% vs. 9%).

02

While most know you need a license to shoot, Female Hunters are significantly more likely to say they know this (98% vs. 89%); However, Male Hunters are significantly more likely to have purchased a license (100% vs. 94% of females), especially annual licenses (76% vs. 66%).

03

When asked where their license fees go, the most commonly given top of mind answer was conservation; Male Hunters were significantly more likely to agree that their fees go towards conservation when directly asked:

- awareness that funds generated from license fees go towards state fish and wildlife agencies (88% vs. 76%)
- awareness of manufacturers paying excise taxes on the sale of gear and equipment that go towards conservation efforts (71% vs. 60%).

04

While most purchase licenses because it is the law, and the right thing to do, Male Hunters are significantly more likely to say they purchase a license because all their fees are invested back into conservation (52% vs. 40% of females).

05

When asked what conservation meant to them, Male Hunters were significantly more likely to say “maintenance” (33% vs. 23%), while Female Hunters were more likely to say “protection” (27% vs. 13%). Both groups equally like knowing that their license funds go towards conservation as both care about healthy wildlife populations and want to protect and preserve the wildlife.

CAHSS: Male Hunters vs. Female Hunters

06

Demographic Differences

Females had significantly more younger respondents, while the Males had significantly more older respondents: the average age of a Female Hunter was 36 years of age and the average age of a Male Hunter was 44 years of age.

Over three-quarters of male and female hunters are married; however, Female Hunters were significantly more likely to say they were not married but living with significant other (11% vs. 4% of males).

Female Hunters were significantly more likely to participate in outdoor activities with these either their spouse/significant other (86% vs. 67%) or other family members (52% vs. 37%).

Males are significantly more likely to say they participate in outdoor activities to build expertise in their sport (76% vs. 66% of females) and enjoy the solitude of being alone (69% vs. 58% of females).

Females were significantly more likely to be categorized as Family Outdoors (44% vs. 31% of males) and Beginner/Intermediate Hunters (53% vs. 42%), while Males were categorized significantly more as Outdoor Enthusiasts (70% vs. 56% of females) and Avid Hunters (59% vs. 47%).

Male Hunters were also significantly more likely to have higher household incomes, while Female Hunters had lower household incomes; they were also significantly more likely to be employed (85% versus 61% of females) and have higher educations (54% of males had at least a college education or greater, while only 34% of females claimed this).

No differences were found by region or race/ethnicity,

