



PO Box 6435 ■ Fernandina Beach, FL 32035 ■ Office (904) 277-9765

July 8, 2020



Angler Personas: Understanding Anglers’ Motivations



Funded by Multi-State Conservation Grant # F19AP00114 awarded and administered by the Association of Fish and Wildlife Agencies (AFWA) and the U.S. Fish and Wildlife Service (USFWS).

Acknowledgements

This project was funded by a Sport Fish Restoration Grant (F19AP00114) awarded and administered by the U.S. Fish and Wildlife Service with support from the Association of Fish and Wildlife Agencies. Extensive surveys were needed to collect the detailed data required for this effort. Many companies, organizations and individuals assisted efforts to reach anglers including:

Arkansas Game and Fish Commission
B.A.S.S. / BASSmasters
Fishing League Worldwide (FLW)
Missile Baits
Plano Synergy
Seaguar
TruFishing
Westin Fishing

American Baitworks
Bonnier (Saltwater Angler, Sport Fishing, and more)
Jersey Coast Anglers Association (JCAA)
On The Water
Recreational Boating and Fishing Foundation
The Bass Federation / Student Angler Federation
We Fish ASA

The authors also greatly appreciate the recommendations and guidance provided by the American Sportfishing Association's Market Insights Committee, especially Serena Petri (Johnson Outdoors), Gerry Benedicto (Seaguar) and Mike Caruso (The Fisherman Magazine). We also appreciate the leadership, input and support from Liz Ogilvie, ASA's Vice President and Chief Marketing Officer. Regardless of the input and help from many, the authors are solely responsible for all content within.

Executive Summary

People are drawn to sportfishing for a variety of reasons, many of which include escape, engagement, challenge, and relaxation. To the extent that manufacturers, retailers, and other sportfishing organizations can recognize the unique angler personas and to tap into their motivations, marketing and communication efforts will be more effective and efficient, driving increased sales and participation.

This study identified seven unique segments, or personas, that comprise U.S. anglers (Table E1). These angler personas, constructed around motivations to participate in sportfishing, span the demographic spectrum, have different levels of experience, and participate in different types of fishing. By understanding the core reasons why people fish, efforts to retain our anglers, to prevent them from leaving for other recreations, plus efforts to increase product sales, can be enhanced:

Table E1. The Seven Angler Personas that Represent the U.S. Sportfishing Market

| Personas | Primary Motivations (<i>in priority order</i>) | | |
|---------------------------|--|---|---|
| Traditionalist | Passing on my love of fishing to others | To be a part of conservation efforts | Fishing is a tradition that was passed down to me |
| Occasional Angler | To meet a challenge | - | - |
| Friendly Fisherman | Connecting with family or friends | Spending time outdoors | Get away and relax |
| Consumptive Angler | Catching fish for food | Fishing is a tradition that was passed down to me | I want an outdoor activity that connects with me |
| Social Dabbler | Connecting with family or friends | - | - |
| Adventurous Angler | The thrill and challenge of fishing | I want an outdoor activity that connects with me | I am fascinated by fish |
| Zen Angler | Get away and relax | - | - |

Traditionalists see themselves as all things fishing. It's their lifestyle. Traditionalists begin fishing at a younger age, tend to be older, are more affluent, and consider themselves fairly advanced anglers. They are avid in fishing participation and equipment purchases and have many motivations to fish. For most Traditionalists, angling was a tradition passed down to them, and more than others, they want to continue that cycle – their legacy - by passing on their love of fishing and helping with conservation efforts. Fishing offers Traditionalists a setting in which they can participate in an outdoor activity that connects with them, as well as the ability to connect with family and friends. While this persona does not provide much opportunity for increasing number of angler days, they can be instrumental to other R3 and conservation strategies such as mentoring or volunteering.

Occasional Anglers ranked lowest on most motivations to fish. Generally, this group fishes to satisfy a fishing goal such as landing a trophy or catching a targeted species. But, as the opposite of the Traditionalist, they could stop fishing and not miss a beat. Many of them indicated that participating in relaxing activities at home was the

key reason they did not have time to fish. They are happy with sporadic participation and thus represent minimal opportunity for increasing overall participation and improving equipment sales as compared to other personas. Ironically, they show the highest level of interest in improving their fishing skills, likely to help achieve their next goal in fishing, but the least likely to do anything about it. Fishing and advance skills training must be convenient if the Occasional Angler is to increase his or her fishing activity.

The **Friendly Fisher** is an affluent persona who is motivated to fish because it is an activity that offers them the ability to connect with family and friends, spend time outdoors, and to get away and relax. They are usually beginner anglers who have not made a fishing-related purchase within the past year. When they do make purchases, their spending habits tend to be low. The social aspect of fishing is imperative to their participation, so it is unlikely they will go fishing unless asked to go by someone else. Targeted communication strategies that entice the Friendly Fisher to keep fishing 'top of mind', to talk fishing with friends and family and make fishing plans, and help them to understand the tackle that will best serve their needs may help increase participation among this group.

Consumptive Anglers enjoy catching fish for food, spending time outdoors, and fishing to get away and relax. This persona is most likely to fish with live bait in freshwater settings. Given that about 40 percent of them did not fish in the previous year, there could be opportunities to increase participation among this group. For example, Consumptive Anglers might be more willing to go fishing when they know their fishing sites are well-stocked with their targeted species, which is a topic of interest to them. They are lower income, and are minimalists in their tackle, though they will purchase mid-range tackle when they see the value. Marketing strategies directed at this group should focus on fishing more often, to use fishing as a way to relax outside with the side benefit of possibly bringing home dinner.

Social Dabblers tend to fish because it allows them to connect with family and friends. They generally do not show much interest in other elements of fishing such as the outdoors or relaxation factor. They have low rates of participation and equipment purchasing. Social Dabblers are receptive to invitations from friends or family members to fish, but there is limited potential to convince them to fish more than they do now – unless their friends do so. Increasing their fishing activity will depend on making fishing a priority activity for their friends and family.

Adventurous Anglers are primarily motivated to fish for the thrill and challenge and as an activity that connects with them. They are fascinated by fish, wanting to know more about fish biology and habits, then using that information to improve their fishing success. They consider themselves to be somewhat experienced and are not interested in fishing as a way to relax or connect with others. They are not (yet) interested in passing fishing along to the next generation but give them time as they age. Only the Traditionalist commits more time and money to fishing than the Adventurous Anglers. It may be possible to increase their participation through lessons or instruction to improve their fishing methods and techniques, or to promote new and exciting fishing opportunities.

Zen Anglers fish as a means to get away and relax. That's it. While they do express some interest in spending time with friends and family during good fishing experiences, they are generally not motivated to fish as a way to connect with people, but don't mind having a friend or family member as company. They are unlikely to become mentors for new anglers outside of family. While many Zen Anglers have been fishing for years, it is possible that marketing fishing gear that maximizes the ability to relax and/or to make fishing easier, while also boosting catch rates, may increase participation and spending among this persona. Do not position fishing as

possibly requiring extensive preparations and effort. Keep fishing simple and convenient to maintain the Zen Angler's interest in fishing.

While each persona is unique in overall motivations to fish, there is a universal catalyst for increasing participation across all personas. As seen in many past studies, an invitation from a friend or family member is the most cited way to increase participation, even among the most avid anglers. With the understanding that an invitation could generate greater participation, which in turn increases sales, the sportfishing community can reach out to their customers using insights from this report to encourage anglers to invite friends, family members, coworkers, and others to fish.

The remainder of this document provides significant details into each persona, plus describes all anglers as a whole, or average, profile for comparison purposes. The second half of the document provides detailed tables regarding fishing habits, personas' demographics and much more.

PLEASE NOTE: This report segments people who already fish. A critical need in the sportfishing community is to recruit new anglers. To aid angler recruitment, the Recreational Boating and Fishing Foundation (RBFF) has conducted a personas and segmentation analysis of potential new anglers. This recommended report is available along with other valuable research by visiting <https://www.takemefishing.org/specialreport/>.

Table of Contents

| | |
|---|----|
| ACKNOWLEDGEMENTS | 2 |
| EXECUTIVE SUMMARY | 3 |
| LIST OF FIGURES..... | 9 |
| BACKGROUND..... | 10 |
| METHODS | 10 |
| SURVEY SAMPLES | 10 |
| DATA WEIGHTING | 11 |
| SEGMENTATION | 11 |
| THE TYPICAL, OR AVERAGE, ANGLER | 12 |
| THE SEVEN PERSONAS | 15 |
| MEET THE PERSONAS..... | 16 |
| <i>The Traditionalist</i> | 17 |
| <i>The Occasional Angler</i> | 20 |
| <i>The Friendly Fisher</i> | 23 |
| <i>The Consumptive Angler</i> | 26 |
| <i>The Social Dabbler</i> | 29 |
| <i>The Adventurous Angler</i> | 32 |
| <i>The Zen Angler</i> | 35 |
| THE “PLAYING FIELD” | 38 |
| DETAILED SURVEY RESULTS | 42 |
| INTRODUCTION TO FISHING | 42 |
| FISHING ACTIVITY PREFERENCES | 47 |
| REACTIVATING AND RETAINING PARTICIPANTS | 52 |
| PURCHASES | 58 |
| MEDIA CONSUMPTION | 63 |
| DEMOGRAPHICS | 69 |
| APPENDIX 1: MAX-DIFF RESULTS | 72 |

List of Tables

| | |
|--|----|
| TABLE 1. THE TYPICAL ANGLER SNAPSHOT. | 14 |
| TABLE 2. PRIMARY FISHING MOTIVATIONS BY PERSONA. | 15 |
| TABLE 3. THE TRADITIONALIST SNAPSHOT. | 19 |
| TABLE 4. THE OCCASIONAL ANGLER SNAPSHOT. | 22 |
| TABLE 5. THE FRIENDLY FISHER SNAPSHOT. | 25 |
| TABLE 6. THE CONSUMPTIVE ANGLER SNAPSHOT. | 28 |
| TABLE 7. THE SOCIAL DABBLER SNAPSHOT. | 31 |
| TABLE 8. THE ADVENTUROUS ANGLER SNAPSHOT. | 34 |
| TABLE 9. THE ZEN ANGLER SNAPSHOT. | 37 |
| TABLE 10. SELF-REPORTED FISHING EXPERIENCE. | 42 |
| TABLE 11. HOW RECENTLY HAVE YOU BEEN FISHING? | 43 |
| TABLE 12. HOW MANY DAYS DID YOU FISH IN THE PAST YEAR? | 43 |
| TABLE 13. HOW OLD WERE YOU WHEN YOU BEGAN FISHING? | 44 |
| TABLE 14. HOW DID YOU FIRST BECOME INTERESTED IN FISHING? | 44 |
| TABLE 15. WHO DID YOU FIRST GO FISHING WITH? | 45 |
| TABLE 16. THINKING OF THE FISHING EXPERIENCES THAT MADE YOU AN ANGLER, HOW DID YOU FIRST EXPERIENCE FISHING: WHERE DID YOU FISH FROM? | 45 |
| TABLE 17. HOW OFTEN HAVE YOU FISHED OUTSIDE OF YOUR HOME STATE IN THE PAST YEAR? | 46 |
| TABLE 18. DO YOU EXPECT TO GO FISHING IN THE NEXT YEAR? | 47 |
| TABLE 19. PERCENTAGE OF TIME FOR TYPES OF FISHING EXPECTED WITHIN THE NEXT YEAR, OR DURING A TYPICAL YEAR? | 47 |
| TABLE 20. PERCENTAGE OF TIME FOR TYPES OF FISHING TECHNIQUES IN THE NEXT YEAR, OR IN A TYPICAL YEAR? | 48 |
| TABLE 21. FROM WHERE DO YOU TYPICALLY FISH, OR PLAN TO FISH? | 48 |
| TABLE 22. WHICH FRESHWATER SPECIES DO YOU TYPICALLY TARGET? | 49 |
| TABLE 23. WHICH SALTWATER SPECIES DO YOU TYPICALLY TARGET? | 50 |
| TABLE 24. WHICH FACTORS DO YOU CONSIDER MOST IMPORTANT WHEN SELECTING A FISHING SITE? | 51 |
| TABLE 25. CONSIDERING YOUR NEXT FISHING OUTING, HOW WOULD YOUR PLANS BE AFFECTED IF YOU DIDN'T CATCH ANY FISH ON YOUR PAST TRIPS? | 53 |
| TABLE 26. CONSIDERING YOUR NEXT FISHING OUTING, HOW WOULD YOUR PLANS BE AFFECTED IF YOU DIDN'T CATCH ANY FISH ON YOUR PAST TRIPS? | 53 |
| TABLE 27. WHAT OTHER ACTIVITIES OR HOBBIES TYPICALLY COMPETE AGAINST FISHING FOR YOUR TIME? | 54 |
| TABLE 28. WHICH OF THE FOLLOWING REASONS HAS PREVENTED YOU FROM FISHING AT LEAST ONCE IN THE PAST YEAR? | 54 |

| | |
|---|----|
| TABLE 29. EVEN IF YOU ARE AN AVID ANGLER, WHICH OF THE FOLLOWING MIGHT ENCOURAGE YOU TO FISH MORE OFTEN? | 55 |
| TABLE 30. HAVE YOU PURCHASED ANY FISHING RELATED ITEMS IN THE PAST YEAR? | 58 |
| TABLE 31. HOW MUCH HAVE YOU SPENT ON FISHING EQUIPMENT WITHIN THE PAST YEAR IN TOTAL? | 59 |
| TABLE 32. WHICH OF THE FOLLOWING ITEMS HAVE YOU PURCHASED WITHIN THE PAST YEAR? | 59 |
| TABLE 33. HOW MUCH DID YOU SPEND ON YOUR MOST RECENT REEL PURCHASE? | 60 |
| TABLE 34. HOW MUCH DID YOU SPEND ON YOUR MOST RECENT FISHING ROD PURCHASE? | 60 |
| TABLE 35. MUCH DID YOU SPEND ON YOUR MOST RECENT ROD/REEL COMBO PURCHASE? | 61 |
| TABLE 36. WHAT TYPE OF LINE HAVE YOU PURCHASED WITHIN THE PAST YEAR? | 61 |
| TABLE 37. WHERE DO YOU TYPICALLY PURCHASE FISHING EQUIPMENT? | 62 |
| TABLE 38. WHICH TYPES OF MEDIA HAVE YOU USED FOR FISHING RELATED ENTERTAINMENT IN THE PAST YEAR? | 63 |
| TABLE 39. WHAT TYPE OF FISHING RELATED WEBSITES DO YOU TYPICALLY VISIT? | 65 |
| TABLE 40. WHAT TYPE OF FISHING RELATED TELEVISION DO YOU TYPICALLY WATCH? | 65 |
| TABLE 41. WHAT TYPE OF FISHING RELATED MAGAZINES DO YOU TYPICALLY READ IN PRINT FORMAT? | 66 |
| TABLE 42. HOW DO YOU ENGAGE WITH FISHING CONTENT ON SOCIAL MEDIA? | 66 |
| TABLE 43. WHICH OF THE FOLLOWING TYPES OF PROFILES DO YOU TYPICALLY FOLLOW OR SUBSCRIBE TO ON SOCIAL MEDIA? | 67 |
| TABLE 44. WHICH OF THE FOLLOWING SOURCES DO YOU FIND INFLUENTIAL WHEN RESEARCHING FISHING INFORMATION? | 68 |
| TABLE 45. GENDER. | 69 |
| TABLE 46. GEOGRAPHIC REGION. | 70 |
| TABLE 47. AGE CATEGORY. | 70 |
| TABLE 48. HIGHEST LEVEL OF EDUCATION. | 71 |
| TABLE 49. HOUSEHOLD INCOME. | 71 |
| TABLE 50. WHICH OF THE FOLLOWING CHARACTERISTICS MAKE A GOOD FISHING EXPERIENCE, AS YOU DEFINE IT? | 73 |

List of Figures

| | |
|--|----|
| FIGURE 1. PROPORTIONAL SIZE OF EACH PERSONA. | 16 |
| FIGURE 2. PLAYING FIELD– CATCHING FISH FOR FOOD & CONNECTING WITH FAMILY OR FRIENDS. | 38 |
| FIGURE 3. PLAYING FIELD OF DIFFERENT PERSONAS – CATCHING FISH FOR FOOD & GETTING AWAY TO RELAX. | 39 |
| FIGURE 4. PLAYING FIELD OF DIFFERENT PERSONAS – AMOUNT SPENT LAST YEAR & SPENDING TIME OUTDOORS..... | 40 |
| FIGURE 5. PLAYING FIELD OF DIFFERENT PERSONAS – AMOUNT SPENT ON REEL PURCHASE & SPENDING TIME OUTDOORS. | 41 |
| FIGURE 6. WHICH OF THE FOLLOWING CHARACTERISTICS MAKE UP A GOOD FISHING EXPERIENCE, AS YOU DEFINE IT? | 52 |
| FIGURE 7. WAYS TO INCREASE PARTICIPATION, BY PERSONA. | 56 |
| FIGURE 8. PURCHASE HABITS BY PERSONA..... | 58 |
| FIGURE 9. MEDIA USAGE BY PERSONA..... | 64 |
| FIGURE 10. GENDER BY PERSONA. | 69 |
| FIGURE 11. CATCHING LOTS OF FISH: PROBABILITY SCALED RESULTS BY PERSONA. | 73 |
| FIGURE 12. CATCHING ONLY LARGE FISH: PROBABILITY SCALED RESULTS BY PERSONA. | 74 |
| FIGURE 13. CATCHING A TROPHY FISH: PROBABILITY SCALED RESULTS BY PERSONA. | 75 |
| FIGURE 14. ENJOYING THE OUTDOORS: PROBABILITY SCALED RESULTS BY PERSONA. | 76 |
| FIGURE 15. HAVING A RELAXING TIME: PROBABILITY SCALED RESULTS BY PERSONA..... | 77 |
| FIGURE 16. SPENDING TIME WITH FRIENDS AND FAMILY: PROBABILITY SCALED RESULTS BY PERSONA. | 78 |
| FIGURE 17. CATCHING THE SPECIES, I AM TARGETING: PROBABILITY SCALED RESULTS BY PERSONA. .. | 79 |
| FIGURE 18. IMPROVING MY FISHING TECHNIQUE: PROBABILITY SCALED RESULTS BY PERSONA. | 80 |

Background

People are drawn to fishing for a variety of reasons ranging from a chance to relax, for thrilling experiences or to engage with others, among other reasons. To the extent that state agencies, manufacturers, retailers, and other organizations in the sportfishing community can tap into these motivations, the chance of growing participation and sales will significantly improve. This project, requested by industry and funded by state fisheries agencies using sportfishing excise dollars, was based on surveys and statistical methods that identified the seven segments, or personas, that comprise all U.S. anglers.

Methods

Survey Samples

Data collection spanned two survey phases: (Phase 1) Segmentation Survey and (Phase 2) Detailed Survey. These two surveys consisted of the following:

1. The Segmentation Survey was fielded to a balanced sample of the U.S. general population. This survey explored demographics, general fishing participation, and motivations to fish. This sample (n=3,035) was used to identify the ideal segmentation solution of seven personas. The sample from the Segmentation Survey was also used to define the size of each segment and the overall population characteristics.
2. The Detailed Survey added depth to each persona by adding supplementary insights regarding desired fishing experiences, retention topics, media behavior, and common fishing purchases. This survey was fielded in two parts:

ASA members and media partners: using their own communication channels, ASA industry and media partners fielded survey invites, generating 6,436 completed, usable responses. This effort generated responses from anglers who tended to be more experienced and more avid.

Third party general population panel: Southwick Associates generated 2,856 completed, usable responses through a third-party panel, fielded to a general population sample. This effort targeted and collected responses from the personas who are less avid about fishing and were not expected to be well represented in the first survey.

Data Weighting

The sample obtained through the Segmentation Survey was weighted to ensure the results represented the U.S. population based on gender, age, and geographic region of residence. Using these results, the sample collected through the Detailed Survey effort was also weighted to ensure that respondents reflected the same demographic composition and general angler characteristics. Weights were based on age, geographic region, gender, fishing experience, and segment membership. These weights helped correct for any avidity biases that arose from the unbalanced fielding of the Detailed Survey effort.

A note about statistical reliability: The reported percentages in the tables are subject to sampling variability, often called the “margin of error”. This is typically presented as +/- some percentage to indicate the range of values that includes the true percentage in the total population of all anglers. Because the margin of error is determined by the reported percentage and the size of the sample on which it is based, the margin of error will be different for each table in the report. For that reason, we include “N=” at the bottom of each table to denote the unweighted sample size on which the table is based and as a general indication of statistical reliability. For reference, a normally distributed sample of 400 respondents will have a margin of error no greater than +/- 4.9% at a 95% confidence level.

Segmentation

The Segmentation Survey data were used to segment respondents into seven groups based on their primary motivations for participating in fishing. Viewing a list of choices, respondents were asked to identify which motivations reflected their reasons for wanting to participate in fishing, such as connecting with family/friends or to get away and relax. These binary indicators of motivation, presented below, were used as the main segmentation variables. The “K-means clustering” statistical technique was used to group anglers and identify segments.

- To spend time outdoors
- To catch fish for food
- To participate in a tradition that was passed down to me
- To get away and relax
- To introduce myself/my family to something new
- I am fascinated by fish
- For the thrill / challenge
- To connect with family or friends
- To participate in an outdoor activity that connects with me
- To get exercise / be active
- To pass on my love of fishing to others
- To be a part of conservation efforts

The Typical, or Average, Angler

There are many different types of anglers. As described later, U.S. anglers can be divided into seven major personas, which each desiring a different mix of benefits from a day of fishing and therefore having different participation and spending preferences. For this reason, we do not recommend marketing to the “average” angler. However, understanding the average angler is key to understanding and comparing the seven unique personas. Key points about the ‘average angler’ are presented here and details are in the supporting tables at the reports end:

1. Angler Demographics:

- a. The overall sample of survey respondents consisted of 53.8% males and 46.2% females with an average age of 42.1.
- b. The most reported household income was \$50,000 to \$74,999 (19.7%); fewer reported incomes of less than \$20,000 (10.9%) or more than \$150,000 (6.9%).
- c. The largest percentages of anglers/respondents were from the South (38.9%) and West (23.3%), followed by the Midwest (21.9%) and Northeast (15.9%).
- d. About 75% of respondents had attended at least some college or earned a technical degree.

2. Outdoor Recreation Interests:

- a. Generally, individuals were interested in outdoor activities.
- b. More than two-thirds of them reported having been fishing, camping, and/or hiking within the last three years, and at least one quarter of them expressed interest in other activities such as mountain biking, rock climbing, and paintball or airsoft.
- c. Only 4.4% indicated they had not participated in any of a list of several outdoor activities during the past three years. To qualify for this survey, they had to have fished, but many contacted in the general population survey had not fished within the past three years.

3. Introduction to Fishing:

- a. Across all reported personas, most individuals (72.5%) became interested in fishing because they were introduced to it by an older family member, usually a parent or grandparent (56.6%).
- b. The majority (83.1%) of respondents indicated that they expect to fish in the next year, although another ASA research suggests that half of them probably will not actually do so.

- c. Nearly 70% reported “an invitation from a friend or family member to go fish” as a factor that might encourage them to fish more often, as often found in many past studies.
 - d. Except for the Traditionalists persona, fishing instruction to improve angling knowledge, methods, and technique was the second most cited way to increase their fishing activity. Traditionalists were more motivated by getting information and insights from local fishing experts.
4. Motivations:
- a. Overall, more than 70% of anglers in the study were motivated to fish to get away and relax and/or to spend time outdoors.
 - b. More than half were motivated by the opportunity to connect with family and friends and/or to participate in an outdoor activity that “connects with me.”
 - c. At least one third were motivated to catch fish for food and/or for the thrill or challenge of fishing.
 - d. Anglers were less motivated to fish to introduce themselves and/or their families to something new.
5. Preferences Regarding Their Desired Fishing Experiences:
- a. Most were interested in spending time with friends and family, enjoying the outdoors, and having a relaxing time.
 - b. Reasons unique to fishing are second-tier preferences including catching only large fish, catching a trophy fish, or catching lots of fish.
6. Where They Fish:
- a. Respondents indicated that they would likely participate in freshwater fishing (69.5%) in a typical year, while almost half (46.7%) indicated that they would likely participate in saltwater fishing in a typical year.
 - b. As expected, larger percentages within each group planned to spend time fishing in freshwater as compared to saltwater, with Social Dabblers (31.3%) and Occasional Anglers (29.5%) reporting the greatest anticipated percentages of saltwater time.
 - c. Most anglers (81.6%) in all personas tended fish from land, shore, beach, pier, dock, bridge, wading, etc., followed by powered boats (56.3%), although a larger percentage of traditionalists (71.7%) chose powered boats when compared to other personas.
7. Shopping:
- a. The primary venues for fishing equipment purchase across all personas were outdoor specialty stores (Bass Pro, Cabela’s, etc.) (56.3%).
 - b. Local bait and tackle shops (46.4%) were the second choice for all groups except the Occasional Anglers and the Social Dabblers, who were more likely to choose general sporting goods stores (Dick’s, Academy, etc.) (39.0%).

- c. When asked about what types of fishing equipment they purchased in the past year, lures and baits were purchased most frequently (83.3%) followed by fishing line (77.5%).
- d. Regarding bait or lures, most use both at some point, with 70.9% of participants using artificial bait and lures each year, 64.5% using live bait and 25.7% trying fly fishing.

8. Media and Information:

- a. Within each persona, the most cited influential source when researching fishing information was a friend or family member (59.0%). State game and park agencies/commissions (36.0%) and online forums/blogs (27.8%) were also popular sources of information.
- b. Among those who used social media outlets for fishing content, Facebook (76.2%), YouTube (64.8%), and Instagram (43.5%) were used most frequently. There was less use of Snapchat (10.4%) and Reddit (7.4%), although more than twice the percentage of Consumptive Anglers and Social Dabblers used Reddit as compared to all other groups.
- c. Respondents most followed profiles of fishing tackle manufacturers (52.2%), local fishing groups (47.7%), fishing-related state agencies (47.5%), and professional anglers (46.6%).
- d. YouTube was primarily accessed for how-to videos (66.0%), professional fishing (61.6%), and fishing product reviews (58.8%); they were less likely to have viewed comedy/blooper fishing videos (24.8%).
- e. Television shows and print magazines about fishing were most popular among Traditionalists but ranked in the top four sources of fishing-related entertainment among the full sample of participants.

TABLE 1. THE TYPICAL ANGLER SNAPSHOT.

| | Typical Angler |
|---|----------------|
| Average Age | 42.1 |
| Gender | |
| • Male | 53.8% |
| • Female | 46.2% |
| Household Income >\$100k | 19.9% |
| Education – Some College or Technical Degree | 74.8% |
| Spent more than \$250 on fishing related goods in the past year | 56.5% |
| Fished more than 10 days in the past year | 56.7% |
| Consider themselves advanced or expert anglers | 22.0% |

The Seven Personas

There are many ways U.S. anglers could be segmented. Considering the sportfishing community's interest in anglers ranges from retention to selling specific types of fishing tackle, anglers could be segmented in many ways. In this report, we settled on seven personas designed with angler retention and reactivation in mind.

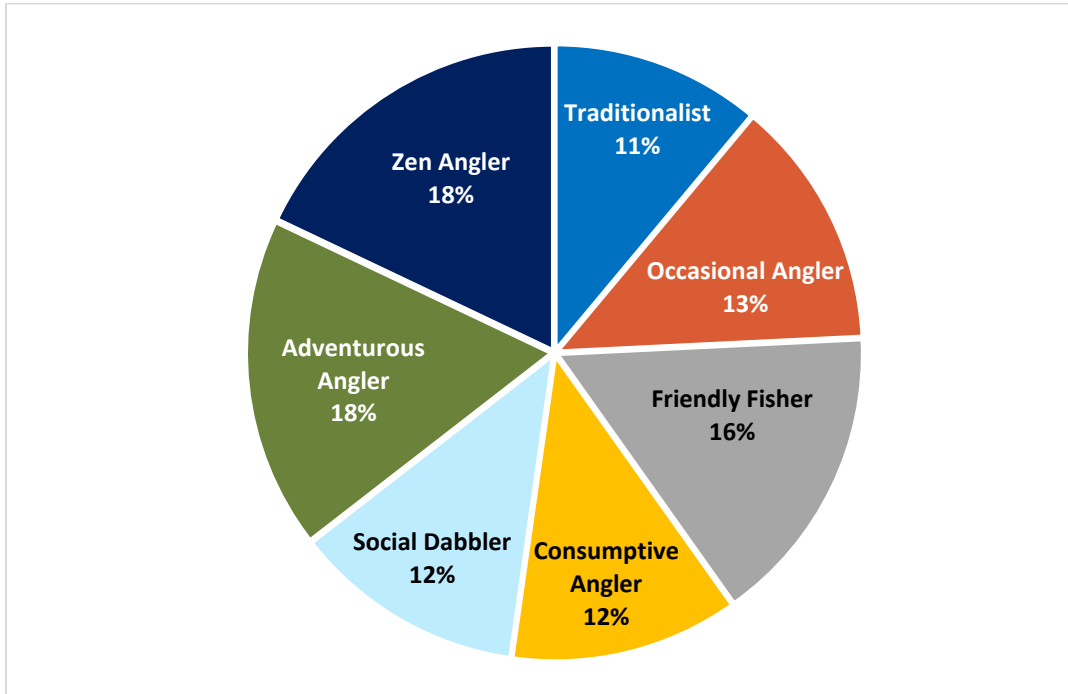
Table 2 provides an overview of the key motivations that define this report's seven personas. While some personas share similar motivations, there are many ways that these personas differ from each other. For instance, while the Zen Angler and the Friendly Fisher seem similar in some of their motivations, the Zen Angler has much less motivation to fish for the social aspect of the experience.

TABLE 2. PRIMARY FISHING MOTIVATIONS BY PERSONA.

| Personas | Primary Motivations (<i>in priority order</i>) | | |
|---------------------------|--|---|---|
| Traditionalist | Passing on my love of fishing to others | To be a part of conservation efforts | Fishing is a tradition that was passed down to me |
| Occasional Angler | To meet a challenge | - | - |
| Friendly Fisherman | Connecting with family or friends | Spending time outdoors | Get away and relax |
| Consumptive Angler | Catching fish for food | Fishing is a tradition that was passed down to me | I want an outdoor activity that connects with me |
| Social Dabbler | Connecting with family or friends | - | - |
| Adventurous Angler | The thrill and challenge of fishing | I want an outdoor activity that connects with me | I am fascinated by fish |
| Zen Angler | Get away and relax | - | - |

Figure 1 illustrates the relative size of each segment. Ranging in size from 11% to 18%, no single segment dominated the landscape of the fishing market.

FIGURE 1. PROPORTIONAL SIZE OF EACH PERSONA.



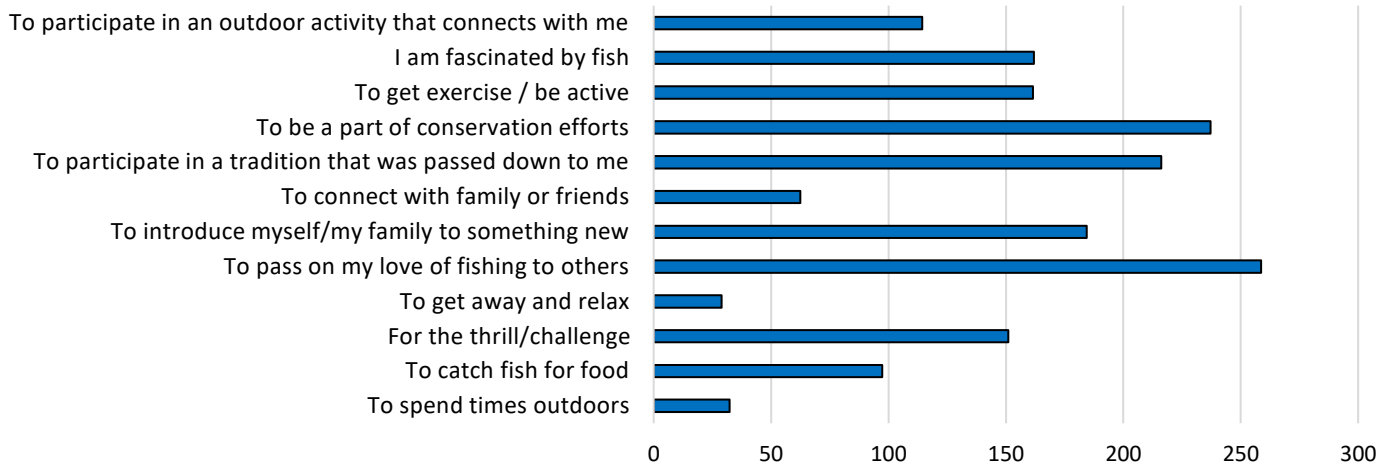
Meet the Personas

A detailed overview of each persona is given in the following pages. For each, we present their motivations to fish, how they differ from the ‘average’ angler, their typical spending, media preferences and more. These descriptions are meant to help readers better understand and therefore more effectively communicate with anglers, plus help identify segments that best fit specific campaigns or products. The second half of this report provides the details used to develop these summaries.

The Traditionalist

“Fishing defines me. It’s my lifestyle. While I love all things fishing, I’m especially gratified to help pass fishing along to future generations.”

Traditionalist (Indexed against Average)



The Traditionalist persona makes up 11.1% of the angler community and can be viewed as the stereotypical avid angler. This group includes the most affluent and experienced anglers who enjoy many types of fishing in both freshwater and saltwater settings. The Traditionalist typically began fishing at about seven years of age, which is younger than other personas. Most of these anglers considered themselves be intermediate (40.0%) or advanced (33.6%) anglers, while few (3.3%) classified themselves as beginners.

Traditionalists have many motivations to fish. In fact, this angler over-indexes for all common fishing motivations. Fishing is truly a lifestyle for many of them, defining part of who they are. For most Traditionalists, angling was a tradition passed down to them, and more than others, they want to continue that cycle by passing on their love of fishing. This is a group to recruit as fishing mentors and ambassadors. Fishing offers Traditionalists a social setting in which they can participate in an outdoor activity that connects with them, the ability to connect with family and friends, and allows them to exercise and be active.

More than 40% of Traditionalists lived in the South, 22.9% in the Midwest, 21.1% in the West, and 12.4% in the Northeast. The majority (87.4%) fished in the past year, with more than one third (36.4%) reporting having fished more than 50 days during that time. Traditionalists were significantly more likely than all other personas to participate in both freshwater fishing (82.7%) and saltwater fishing

(55.7%) in a typical year and indicated that they were likely to continue fishing even if they were not successful during previous fishing trips. Family and work obligations were most cited as competing against fishing for their time, and weather was the most common factor preventing them from fishing at times during the past year. When selecting a fishing site, the opportunity to catch big fish (39.1%) and the abundance of fish (35.8%) were the factors chosen by the largest percentage of Traditionalists. Fewer were concerned with having other activities, such as nearby playgrounds (0.2%), educational programs offered in the area (1.4%), and having people on-site to help (2.6%).

Traditionalists were most likely to have purchased fishing-related items in the past year (92.7%) and spent more on equipment than all other personas. Of those that purchased fishing equipment, 31.6% reported spending \$1,000 or more during that time frame. Traditionalists preferred purchasing fishing supplies from outdoor specialty stores such as Cabela's and Bass Pro (65.6%), as well as local bait and tackle shops (63.1%), but they were more likely than other groups of anglers to purchase fishing equipment online (40.7%) and at fishing shows or expos (17.8%). They were more likely than all other groups to have purchased fishing electronics (GPS, sonar, fish finders) (28.3%).

This group of anglers was also most likely to have used media to access fishing-related entertainment in the last year (90.5%). Of the ones that did so, more than half reported using television (65.8%), websites (65.0%), social media (61.6%), print magazines (60.0%), and state fishing regulation guides (57.5%) for access. As with other personas, fewer Traditionalists used radio (12.4%) and newspaper (13.8%). Traditionalists most accessed state fish and wildlife sites (76.9%), websites for manufacturers or retailers (73.0%), and online magazines such as Field and Stream and Bass Angler (72.9%). On social media, they tended to follow profiles of fishing equipment manufacturers (69.8%) and local fishing groups (66.2%).

Survey respondents were asked to rank (from most important to least important) a list of characteristics that would make up a good fishing experience as they define it. When compared to the remaining six personas, Traditionalists ranked relatively high for "catching the species I am targeting" (significantly greater than preferences of Social Dabblers, Friendly Fishermen, and Zen Anglers) and "catching lots of fish" (higher than Friendly Fishermen and Zen Anglers). They were also statistically more interested in improving fishing technique than Friendly Fishermen but had less of a preference for catching only large fish or a trophy fish compared to Occasional Anglers. Traditionalists ranked higher in preference for spending time with friends and family than Occasional Anglers and Adventurous Anglers, but that preference was significantly lower when compared to Social Dabblers and Friendly Fishermen. Traditionalists also ranked lower than Social, Consumptive, and Zen Anglers for the preferences of enjoying the outdoors having a relaxing time.

Key Takeaways: Traditionalists begin fishing at a younger age than other personas. They are also more affluent and consider themselves more advanced than the other groups. They are avid in both their participation rates and in their equipment purchases. This persona already has a high rate of participation, motivated primarily by passing on the love of fishing to others and to participate in a

tradition that was passed down to them. Traditionalists and should be targeted as mentors and volunteers for fishing educational programs.

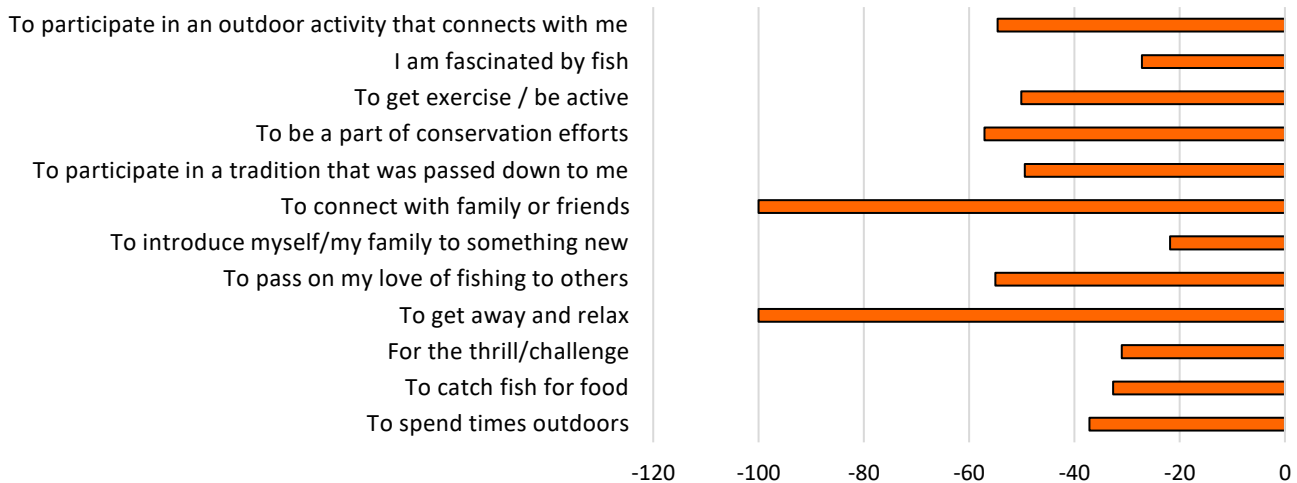
TABLE 3. THE TRADITIONALIST SNAPSHOT.

| | Traditionalist |
|---|----------------|
| Overall percent of population | 11% |
| Household Income >\$100k | 27% |
| Spent more than \$250 on fishing related goods in the past year | 66% |
| Fished more than 10 days in the past year | 58% |
| Consider themselves advanced or expert anglers | 47% |

The Occasional Angler

"I love the outdoors and fishing is OK, but I when I fish, stay outta my way!"

Occasional Angler (Indexed against Average)



Occasional Anglers represent 13.2% of the anglers surveyed. Compared to other angler personas, they ranked relatively low on most motivations to fish. When they fish, it's typically with a goal in mind such as landing a trophy fish or a targeted species. While they are not interested in fishing for social reasons, they generally have interest in introducing themselves and their family to fishing, which may be the ideal marketing approach to retaining their loyalty as an angler. Generally, this group was somewhat

interested in fishing because it allowed them to connect with family and friends, the opportunity to catch fish for food, and connected them with an outdoor activity. They had less motivation than other personas for fishing to spend time outdoors and as a method to get away and relax.

Most Occasional Anglers lived in the South (39.5%) and West (25.4%). Almost 20% were in the Midwest, and 16.1% in the Northeast. They are not the most experienced anglers, with more than half classifying themselves as intermediate (28.3%) or novice (27.5%) anglers. Most began fishing at around age 11. Less than half (43.9%) of this group reported having been fishing during the last year, yet 32.0% of those respondents fished more than 50 days during that time. More Occasional Anglers were likely to participate in freshwater fishing (58.3%) than saltwater fishing (42.9%) in a typical year. These anticipated fishing rates are like those of Social Dabblers but are lower than the other personas.

About a third of Occasional Anglers did not use any type of media to access fishing-related entertainment during the past year. The ones that did use media used websites (35.2%) more

frequently than other outlets. Two-thirds of those who used websites accessed sites for manufacturers or retailers, and 59.7% used state fish and wildlife sites. Print magazines (31.7%), television (31.2%), and social media (27.4%) were the other most common media used for this group. As with most groups, their topical preferences within these types of media were consistent with those for the sample.

Among this group, relaxing at home (44.4%) and work obligations (43.6%) were the primary items competing against time for fishing. Lack of crowds (26.7%) and easy access (26.2%) were priorities when selecting fishing sites, but while improving fishing technique was cited as a priority for this persona, only 1.7% of Occasional Anglers were interested in educational programs at fishing sites. This persona might be enticed to fish more by special beginner events, but they are otherwise not likely receptive to other methods of encouraging increased participation. Any outreach efforts need to be convenient in every sense of the term. Occasional Anglers seem to be happy with their current sporadic participation in fishing.

More than half (53.6%) of Occasional Anglers indicated they had purchased fishing equipment in the past year. The average amount of money spent on fishing equipment was less than \$100 for this group, and more than 40% of them spent \$69.99 or less on their most recent purchases of rods and reels. Still, 53.7% reported spending \$250 or more on fishing supplies during the last 12 months. As with other personas, they preferred to buy their equipment at outdoor specialty shops (48.2%), but like Social Dabblers, their second preference was general sporting goods stores like Dick's or Academy (40.2%). They were less likely than most groups to make equipment purchases at local bait and tackle shops (29.6%).

Occasional Anglers ranked lower than average for their motivations to fish, and they were often at the extremes regarding their preferences for characteristics of a good fishing experience. They had the highest preferences for catching only large fish, catching a trophy fish, catching a targeted species, and the lowest preferences for enjoying the outdoors, having a relaxing time, spending time with friends and family. These factors, when compared to the remaining five personas, were significantly lower than those preferences among Friendly Fishermen, Consumptive Anglers, Social Dabblers, and Zen Anglers. They also ranked highest in desire for improving fishing technique, significantly more so than Friendly Fishermen and Consumptive Anglers. They also preferred catching lots of fish statistically more than Zen Anglers and Friendly Fishermen.

Key Takeaways: Occasional Anglers are generally happy with their current sporadic participation in angling and thus represent lower opportunities for sales compared to other personas. When they fish, they typically have a goal in mind such as a trophy fish, a targeted species, or many fish. Nearly half of them cited relaxing at home as a primary competitor for time that could be spent fishing. Occasional Anglers had the highest preferences for catching only large fish, catching a trophy fish, catching a targeted species, but, as compared to other groups, had the lowest preferences for enjoying the outdoors, having a relaxing time, spending time with friends and family. Overall, though there seems to be minimal opportunity for increasing participation among Occasional Anglers, pushing opportunities

to advance their fishing skills via very convenient services, along with challenging them with new goals, might help boost participation.

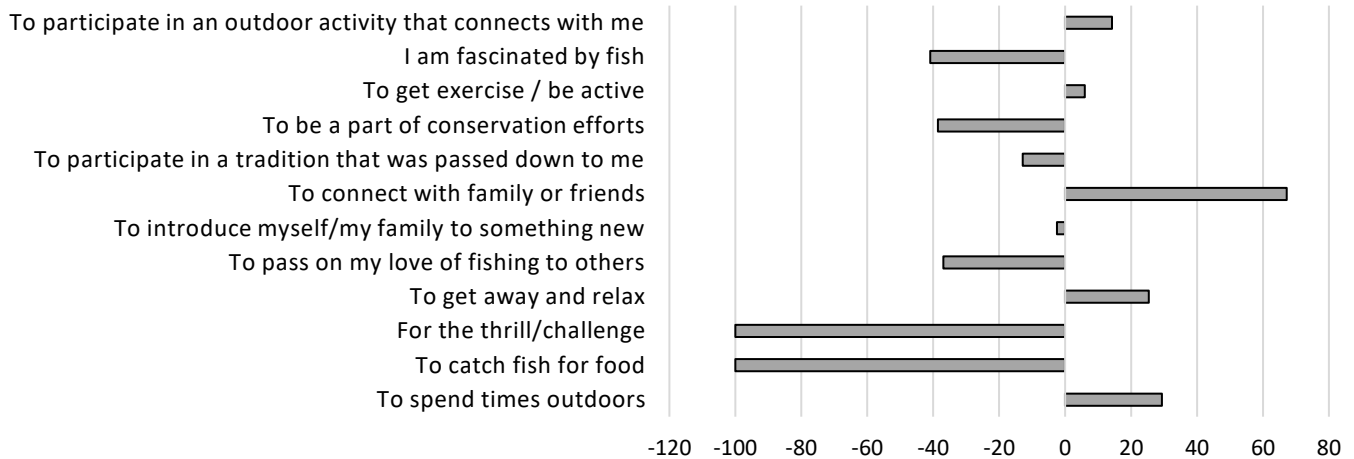
TABLE 4. THE OCCASIONAL ANGLER SNAPSHOT.

| | Occasional Angler |
|---|-------------------|
| Overall percent of population | 13% |
| Household Income >\$100k | 20% |
| Spent more than \$250 on fishing related goods in the past year | 54% |
| Fished more than 10 days in the past year | 20% |
| Consider themselves advanced or expert anglers | 21% |

The Friendly Fisher

“I really enjoy spending quality time with my friends and family outdoors. Fishing is a great way to do so.”

Friendly Fisher (Indexed against Average)



the Northeast.

The Friendly Fisher is motivated to fish because it is an activity that offers them the ability to spend time outdoors with others and provides the opportunity to get away and relax. This persona represents about 16% of anglers sampled. Most respondents in this persona were women (55.6 %), many of whom were college graduates. About a third (34.4%) of this group lived in the South, 25.1% in the West, 20.5% in the Midwest, and 20.0% in

These anglers generally considered themselves to be beginner (24.3%), novice (30.8%), or intermediate (24.3%) anglers. Most have been fishing within the past three years, and more than 40% have fished in the last year. Of those, 28.1% fished between one to five days. The Friendly Fisher typically is not interested in specialized fishing activities like fly-fishing, but they nonetheless love fishing for being a relaxing, social activity, and could likely be convinced to fish more frequently if they received an invitation from a friend or a plea from family members. Friendly Fishermen also indicated that they would likely participate in freshwater fishing (70.6%) and some saltwater fishing (45.2%) in a typical year.

Spending time relaxing outside is a major motivation for the Friendly Fisher, but the social aspect of fishing is also crucial to their participation. For individuals in this segment, not having anyone to go

with (34.7%) was the top reason for not fishing. Of all the personas, this group was second least likely (to the Social Dabbler) to have accessed media for fishing related entertainment in the past year. Of the 59.5% who did, they tended to use websites (29.4%), television (29.2%), social media (26.9%), and state fishing regulation guides (24.2%). The most common websites used among Friendly Fishermen were for state fish and wildlife sites (70.4%) and sites for manufacturers or retailers (49.8%). Similarly, they were more likely to follow parks and wildlife or other fishing-related state agencies (47.8%) on social media than manufacturers of fishing equipment (40.5%) and other types of profiles.

When selecting fishing sites, the Friendly Fisher tends to seek a lack of crowds (38.2%) and scenic beauty (36.1%). Common competitors for fishing time were family obligations (60.4%) and relaxing at home (47.4%). Almost half (49.1%) of Friendly Fishermen purchased fishing-related items last year, though, like Social Dabblers, their spending habits were relatively low. Almost 60% of the group reported spending either under \$100 (35.7%) or \$100 to \$249 (23.5%) on fishing equipment during the time. They were more likely than all other personas to have spent less than \$30 on their most recent fishing rod (18.0%) and reel (22.0%). Friendly Fishermen typically make their purchases at outdoor specialty stores (50.4%) and local bait and tackle shops (48.9%). They were the most likely to use printed catalogs (Cabela's, Bass Pro, etc.) (19.3%) and least likely to order their fishing merchandise from websites, possibly indicating a need for assistance during the shopping process (21.8%).

Similar to Occasional Anglers, Friendly Fishermen had strong preferences for certain characteristics of a desired fishing experience. When compared to the four other personas yet to be described, they had the least preference for catching lots of fish, catching only large fish, catching the targeted species, and improving fishing technique. Preference levels for these items were all significantly lower than Adventurous Anglers. There was a similar statistical difference between these groups for catching a trophy fish. On the other side of the spectrum, Friendly Fishermen had the greatest preferences for enjoying the outdoors and spending time with friends and family (both significantly more than Adventurous Anglers), as well as having a relaxing time, which was statistically less of a preference for Consumptive Anglers, Social Dabblers, and Adventurous Anglers.

Key Takeaways: Friendly Fishermen are one of the more affluent personas. However, about half of Friendly Fishermen have not made a fishing-related purchase within the past year and probably will not unless asked to go fishing again. When they do make purchases, their spending habits are relatively low. Because the social aspect of fishing is crucial to their participation, there may be an opportunity to use targeted communication strategies that entice the Friendly Fisher to talk fishing with friends and family, make fishing plans, and help them to understand the tackle that will best serve their needs, recognizing their lack of experience. Based on their limited use of fishing-endemic media, reaching this audience through non-traditional media channels such as family and lifestyle-oriented themes might have greater success.

TABLE 5. THE FRIENDLY FISHER SNAPSHOT.

| | Friendly Fisher |
|---|-----------------|
| Overall percent of population | 15% |
| Household Income >\$100k | 23% |
| Spent more than \$250 on fishing related goods in the past year | 41% |
| Fished more than 10 days in the past year | 13% |
| Consider themselves advanced or expert anglers | 11% |

The Consumptive Angler

“Fishing allows me to spend time relaxing outside while bringing home dinner.”

Consumptive Angler (Indexed against Average)



The Consumptive Angler primarily enjoys angling to catch fish for food, spend time outdoors, and to get away and relax. This persona is more likely to fish with live bait in freshwater settings than other personas. They comprise 12.1% of the angler population. The average Consumptive Angler began fishing at nine years old and has been fishing for about 33 years. As with all the personas, more individuals in this group lived in the South (39.9%) than other regions. About a quarter of them resided in the West (25.4%) and Midwest (23.9%), and the other 10.8% lived in the Northeast.

The Consumptive Angler fishes more often than most other personas except Traditionalists. About three-quarters of them have fished within the past three years, and about 60% fished within the past year. Even though they participate frequently, 41.1% rank themselves as intermediate in skill. About 20% of this group is 60 years of age or older, and they were more likely than most other segments to listen to friends and family members for fishing insights. They also were likely to refer to state fisheries agencies for information. Considering their primary motivation for fishing, fish stocking is of higher interest for this persona.

Almost 60% of Consumptive Anglers have purchased fishing equipment in the past year, but the amount they spent was relatively low. They tend to be minimalists in their tackle purchases, buying just what they need. Consumptive Anglers bought their equipment mostly at outdoor specialty stores

(55.6%) and local bait shops (52.5%) but were more likely to buy tackle at mass merchants such as Walmart and Sam's (42.9%) than all other personas. Consumptive anglers most reported spending \$100 to \$249 (27.3%) or under \$100 (21.2%) on fishing gear in the past year. Not surprisingly, they are price sensitive though many are willing to buy mid-priced rods and reels.

Consumptive Anglers indicated that they are likely to participate in freshwater fishing (76.2%) and some saltwater fishing (51.4%) in a typical year. They are similar to Friendly Fishermen in that having no one to go with (29.6%) was a primary reason for not going fishing. Like Traditionalists, weather (46.0%) was the primary reason that prevented them from fishing last year, and family (63.0%) and work (53.3%) obligations were the top competitors for fishing time. When looking for fishing sites, they were most concerned with familiar sites with established access (28.7%) and an abundance of fish (27.4%).

Almost 85% of this persona used some type of media for fishing-related entertainment in the past year, and they preferred websites (40.3%), television (36.4%), state fishing regulation guides (35.7%), and social media (33.4%) to other types of media outlets. They most commonly visit state fish and wildlife (70.4%) websites, followed by sites for manufacturers or retailers (49.7%). Facebook (66.9%) and Instagram (42.4%) were the favored social media platforms, though, like Social Dabblers, they were more than twice as likely to use Reddit (15.9%) than the other personas. Consumptive anglers were most likely to follow parks and wildlife or other fishing related state agencies (53.8%) and local fishing groups (34.9%) on social media, and they followed manufacturers of fishing equipment (29.9%) less frequently than all other personas.

Consumptive Anglers tended to rank in the mid-range for preferences regarding what they think is most important for a good fishing experience. When compared to the remaining three personas, there were no statistically significant differences for catching lots of fish, catching only large fish, and having a relaxing time. Individuals in this persona did have significantly greater preferences for enjoying the outdoors and spending time with friends and family than Adventurous Anglers, but members of the Adventurous group were statistically more interested in catching a trophy fish, catching the targeted species, and improving fishing technique than Consumptive Anglers.

Key Takeaways: The Consumptive Angler enjoys catching fish for food, spending time outdoors, and fishing to get away and relax. This persona is more likely to fish with live bait in freshwater settings than other personas. While the Consumptive Angler persona is not the largest group, there is opportunity here for targeted marketing strategies to sell essential fishing equipment to these anglers, as well as an opportunity to increase participation. Many would also likely fish more if they were presented with information and insights from local fishing experts regarding how to catch more fish or new places to try; fostering a network of information that could provide this resource to anglers could possibly increase fishing participation within this persona.

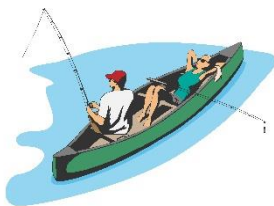
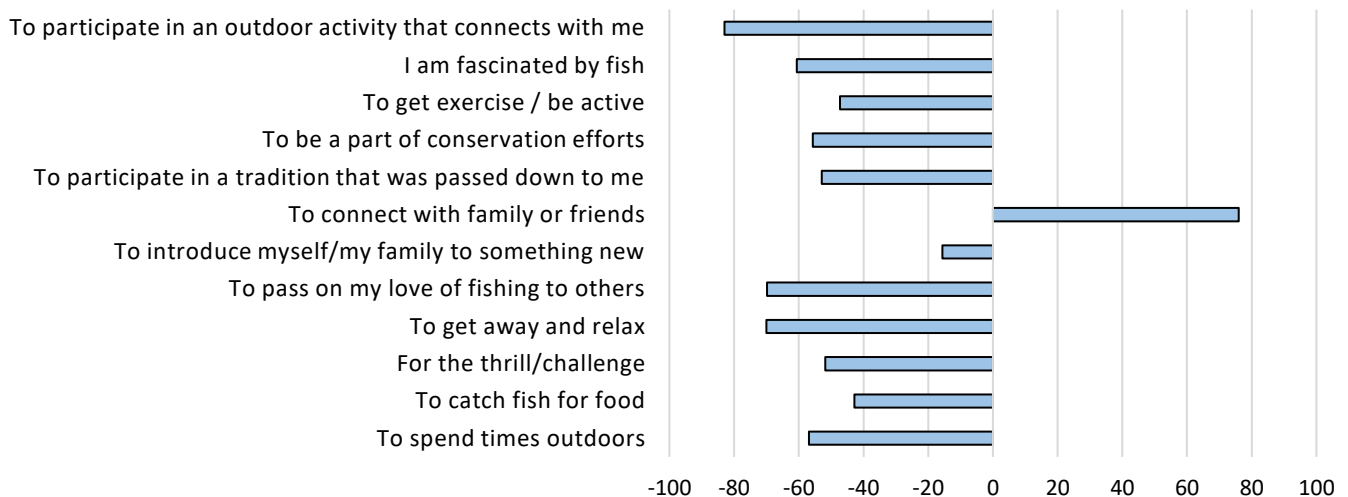
TABLE 6. THE CONSUMPTIVE ANGLER SNAPSHOT.

| | Consumptive Angler |
|---|--------------------|
| Overall percent of population | 12% |
| Household Income >\$100k | 18% |
| Spent more than \$250 on fishing related goods in the past year | 51% |
| Fished more than 10 days in the past year | 25% |
| Consider themselves advanced or expert anglers | 24% |



“My friends, family and I love to try new activities together! It doesn’t matter what we’re doing, spending time with each other is our goal.”

Social Dabbler (Indexed against Average)



Social Dabblers love having fun and relaxing outdoors with friends. They enjoy social interaction while participating in many different outdoor activities. Fishing is one of many activities that offers an opportunity to be with friends and family, as well as the opportunity to participate in an outdoor activity in a relaxing setting, but they are not really interested in this and the other aspects of fishing as much as other anglers. They make up 12.3% of the angler population.

This group is educated, younger, started fishing at a slightly later age (12), and like the Friendly Fisher, consists of more females (53.6%) than males. Social Dabblers are the least avid and least experienced persona, with almost 40% of this group classifying themselves as beginners. More of them were from the South (39.8%), with 24.2% in the Midwest, 19.8% in the West, and 16.2% in the Northeast.

Less than a third (31.8%) of Social Dabblers have fished in the past year, and they were the least likely of all groups to participate in freshwater fishing (57.8%) and saltwater fishing (41.2%) in a typical year. Like many other personas, Social Dabblers lost fishing time due to family obligations. However, more than half (50.8%) said they did not have time to fish because they preferred relaxing at home—reading, watching television, or another similar leisure activity. For this group, school was listed as a barrier to

fishing time for a larger percentage than any other persona. When looking for places to fish, Social Dabblers were most interested in sites that are easy to access (34.3%) and familiar sites with permission and access (31.3%). The weather (34.1%) and having nobody to go fishing with (20.8%) were the primary barriers that prevented them from fishing in the previous year.

Social Dabblers were least likely to have purchased fishing equipment in the past 12 months and most likely to have spent under \$100 (46.9%) on their total purchases. Most group members spent less than \$90 on their most recent fishing rod (58.1%) and reel (54.0%). They bought their equipment primarily at outdoor specialty stores (39.7%), general sporting goods stores (32.8%), and mass merchants (30.7%). Social Dabblers were least likely of all personas to make equipment purchases at local bait and tackle shops (17.0%).

Almost half of Social Dabblers, more than any other persona, reported not using any form of media to access fishing-related entertainment in the past year. Of those who did, they accessed it primarily through television (24.0%), social media (22.1%), websites (20.9%), and state fishing regulation guides (20.0%). Like the Friendly Fishermen and Consumptive Anglers, they tended to visit state fish and wildlife websites (68.5%) and sites for manufacturers or retailers (60.4%) most frequently. Like all other personas, Facebook and Instagram were the most used social media platforms, but Social Dabblers were more likely than other groups to use Twitter (22.4%), Snapchat (21.4%), and Reddit (16.1%). They were the only group that most preferred social media profiles of professional anglers (45.6%), with local fishing groups (43.0%) as their second preference.

A comparison among Social Dabblers and the remaining two personas indicates that their preferences for characteristics of what they consider to be most important for a good fishing experience were similar to those of Zen Anglers. Additionally, there were no statistical differences between Social Dabblers and Adventurous Anglers for catching lots of fish, catching only large fish, and improving fishing technique. However, Social Dabblers were significantly more likely than Adventurous Anglers to prefer fishing while enjoying the outdoors, having a relaxing time, and spending time with friends and family. They also have significantly lower preferences than Adventurous Anglers for catching the targeted species and catching a trophy fish.

Key Takeaways: Social Dabblers use fishing as an opportunity to be with friends and family. For the most part, they want to participate in an outdoor activity in a relaxing setting, but they are not really interested in other aspects of fishing. As such, they were least likely to have purchased fishing equipment in the past 12 months. This persona might be receptive to invitations from friends or family members to fish, but there is limited potential to convince them to fish more than they do now. Although fishing is a fun, social activity, it does not seem to be a priority for this persona. Therefore, it is unlikely they will invest significantly in fishing unless they can be encouraged to fish more by their friends and guided to forms of fishing that offer ease and greater social interaction. Like the Friendly Fisher, reaching this audience through non-traditional media channels such as family and lifestyle-oriented themes might have greater success.

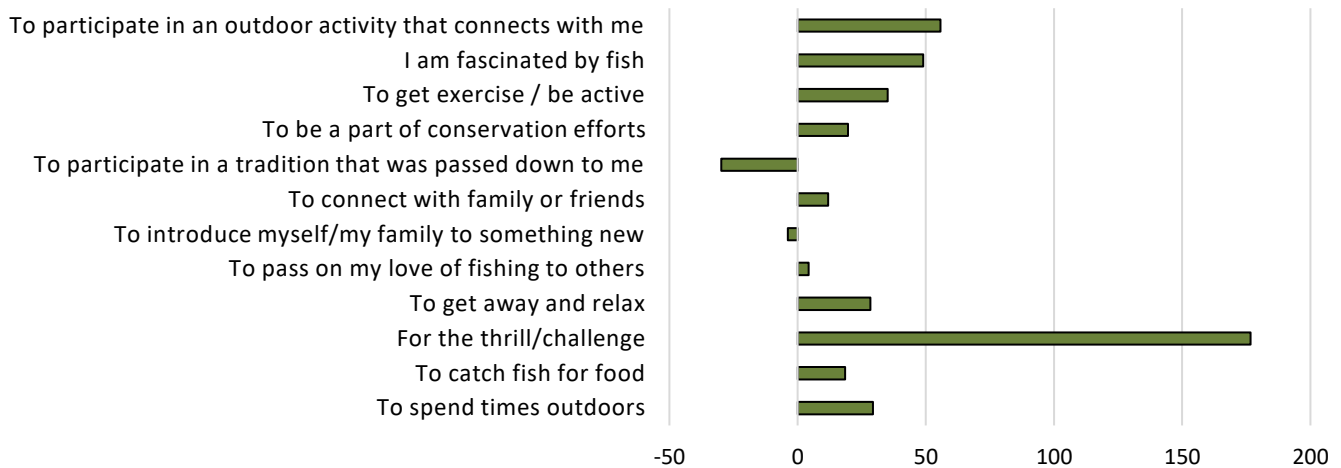
TABLE 7. THE SOCIAL DABBLER SNAPSHOT.

| | Social Dabbler |
|---|----------------|
| Overall percent of population | 12% |
| Household Income >\$100k | 21% |
| Spent more than \$250 on fishing related goods in the past year | 35% |
| Fished more than 10 days in the past year | 10% |
| Consider themselves fairly advanced or expert anglers | 9% |

The Adventurous Angler

“While I do enjoy relaxing outside, what really motivates me is the challenge of a thrilling activity like fishing!”

Adventurous Angler (Indexed against Average)



Adventurous Anglers are motivated to fish for the thrill, challenge and to be active outdoors. Fishing is something that they personally connect with, and are fascinated by fish, wanting to learn more about their habits and then applying these insights to boost their fishing success. These anglers make up the second largest (17.6%) persona of anglers in this study. While they sometimes use fishing to get away and relax, most are motivated by fishing for excitement, as a means of exercising and being active. Members of this group are more likely than other groups to fish from non-powered vessels, such as canoes or kayaks, and consider themselves to be somewhat experienced. More respondents in this persona were from the South (39.7%) as compared to the Midwest (21.1%), West (20.8%), and Northeast (18.5%).

Individuals in this persona began fishing at about 10 years old and were less likely than most other personas to be 60 years of age or older (16.9%), and most of them ranked their experience levels as intermediate (37.2%) or novice (25.0%). More than two thirds of Adventurous Anglers have fished in the last year, usually with artificial lures rather than live bait, and almost a quarter of them fished more than 50 days during that time. This group indicated a high probability of participating in freshwater fishing (77.0%) and saltwater fishing (50.4%) in a typical year.

Adventurous Anglers reported their biggest competition for fishing time came from family (60.6%) and work (57.0%) obligations, and that weather (48.1%) and having no one to go fishing with (26.6%) were the most common obstacles that have prevented them from fishing during the last year. When searching for fishing sites, Adventurous Anglers are most interested in opportunities to catch big fish (35.1%) and an abundance of fish (32.7%).

About 85% of Adventurous Anglers said they use some type of media for fishing-related entertainment, which is second only to Traditionalists. Members of this group preferred websites (50.0%), especially those for manufacturers or retailers (69.5%) and state fish and wildlife sites (59.8%), television (49.7%), social media (43.5%), and state fishing regulation guides (39.8%). They were most likely to subscribe or follow profiles of manufacturers of fishing equipment (61.0%) and professional anglers (51.9%) on social media.

Almost 70% of Adventurous Anglers bought fishing gear in the past year, and their spending habits were most similar to, though slightly less than, Traditionalists. Adventurous Anglers commonly bought equipment at outdoor specialty stores (58.0%), local bait and tackle shops (49.1%), and were more likely than other personas except Traditionalists to buy from websites (38.4%). The largest percentages of group members reported spending \$250 to \$499 (21.1%) and \$100 to \$249 (20.8%), but, when higher-level spending categories are aggregated, 22.4% of Adventurous Anglers spent \$1,000 or more on fishing equipment during the last year. Additionally, many group members spent at least \$110 on their most recent rod (43.6%) and reel (50.2%) purchases.

Regarding preferences for what makes a good fishing experience, Adventurous Anglers score the highest for wanting to catch lots of fish, and second after the Occasional Angler for catching a trophy fish and the species they are targeting. Like all groups, enjoying the outdoors ranks high – or they would not fish – along with spending time with others is important, but not as important compared to most other personas.

Key Takeaways: The Adventurous Angler is the second largest persona, representing 17.6% of the market. They are primarily motivated to fish for the thrill and challenge, exercise and activity, and ability to spend time outdoors. Members of this group are more likely than other groups to fish from non-powered vessels, such as canoes or kayaks, and consider themselves to be somewhat experienced. Only the Traditionalist spends more days fishing and spends more money than the Adventurous Angler persona, there is still room for increased participation. With about two-thirds of this persona fishing fewer than 10 days per year, this persona might be encouraged to fish with opportunities to improve their fishing skills plus by promoting new, exciting fishing experiences to try.

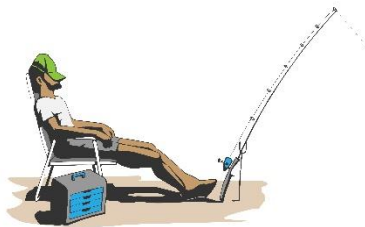
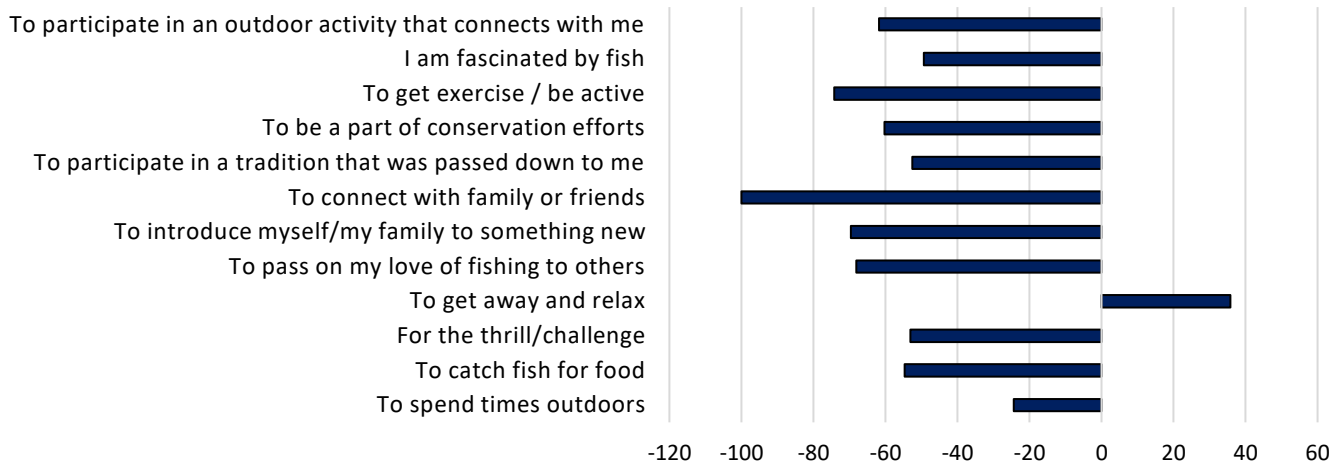
TABLE 8. THE ADVENTUROUS ANGLER SNAPSHOT.

| | Adventurous Angler |
|---|--------------------|
| Overall percent of population | 18% |
| Household Income >\$100k | 23% |
| Spent more than \$250 on fishing related goods in the past year | 62% |
| Fished more than 10 days in the past year | 33% |
| Consider themselves fairly advanced or expert anglers | 25% |

The Zen Angler

“Fishing offers me a chance to relax. Fishing allows me to disengage from the stress of everyday life.”

Zen Angler (Indexed against Average)



The Zen Angler is primarily interested in fishing as a means to get away and relax and to spend time outdoors. While other personas enjoy the social aspect of fishing, the Zen Angler tends to be more of a solitary angler. This is a subtle point: while most Zen Anglers expressed little interest in fishing as a way to connect with friends and family, the Zen Angler is in the middle of the personas' pack by saying that having friends and family accompany them on a trip is part of a good fishing experience. One might hear this quote on a fishing trip with a Zen

Angler: “You gonna talk or are you gonna fish?”

Zen Anglers are the largest of the seven fishing personas, representing more than 18% of the market. Over one third of members in this group lived in the South, 25.1% were from the West, 22.6% lived in the Midwest, and 14.9% were from the Northeast. Individuals in this persona tend to be older than those in the other groups, and even though the Zen Angler may not fish as many days as Traditionalists or Adventurous Anglers, this group considered themselves to be fairly advanced in their fishing abilities.

Almost half (48.2%) of this group bought fishing equipment in the past year. It is noteworthy that this persona contains the lowest percentage of individuals with incomes of \$75,000 or more (29.3%), yet the majority (59.6%) spent at least \$250 or more (and 40.5% spent \$500 or more) on fishing equipment in the past year, making them the third highest spending personas after the Traditionalists and

Adventurous Anglers. Like most other personas, Zen Anglers typically purchased their fishing equipment at outdoor specialty stores (59.4%) and local bait and tackle shops (39.3%), but more of them bought fishing equipment at fishing shows or expos (17.2%) than most other groups. Also, their preference for fishing supply purchases from printed catalogs (15.9%) was second only to the Friendly Fisher.

Zen Anglers began fishing at around 10 years of age, and when compared to other personas, have the largest segment of individuals currently 60 years or older (20.5%). Fewer than half (44.4%) reported fishing in the past year, and of those, similar percentages reported fishing only one to five days (21.9%) or more than 50 days (20.0%). When they do fish, they look for spots that are not crowded (34.3%) and that are easy to access (28.0%). Zen Anglers indicated that they were likely to participate in freshwater fishing (64.8%) and saltwater fishing (42.2%) in a typical year.

Family obligations (51.5%) and relaxing at home (51.1%) were the main factors that competed with time for fishing among Zen Anglers, and weather (33.8%) and having no one to go fishing with (21.7%) were the main factors that had prevented them from fishing.

About 65% of Zen Anglers used media to view fishing-related entertainment in the past 12 months. Of those respondents, 33.2% used television, followed by magazines (29.1%), websites (24.7%), and social media (22.9%). Although members of this persona who used the web to access fishing-related entertainment did visit sites for manufacturers or retailers (64.9%), they were the only group that preferred online magazines (66.8%) such as Field and Stream or Bass Angler over other types of fishing websites. On social media, Zen Anglers were most likely to follow profiles of local fishing groups (47.7%) and manufacturers of fishing equipment (37.5%).

Unlike the Traditionalists and Adventurous Anglers, Zen Anglers had less preferences for catching lots of fish, catching only large fish, catching a trophy fish, and catching the targeted species. They had a moderate preference for improving fishing techniques, and like some of the more social personas, had greater preferences for enjoying the outdoors, having a relaxing time, and spending time with friends and family though not necessarily to use fishing as a way to build better bonds.

Key Takeaways: The best opportunity for growth among Zen Anglers appears to be increasing their annual spending on fishing equipment. There appears to be less opportunity to increase overall participation in this group or in persuading them to mentor others. This group has a relatively high experience level, and even though they may be committed to tried and true techniques and gear, offering products that increase the ability to relax and/or to make fishing easier, while also boosting catch rates, may win more business from this group. This group may also be responsive to opportunities for improving their fishing techniques.

TABLE 9. THE ZEN ANGLER SNAPSHOT.

| | Zen Angler |
|---|------------|
| Overall percent of population | 18% |
| Household Income >\$100k | 18% |
| Spent more than \$250 on fishing related goods in the past year | 59% |
| Fished more than 10 days in the past year | 19% |
| Consider themselves fairly advanced or expert anglers | 21% |

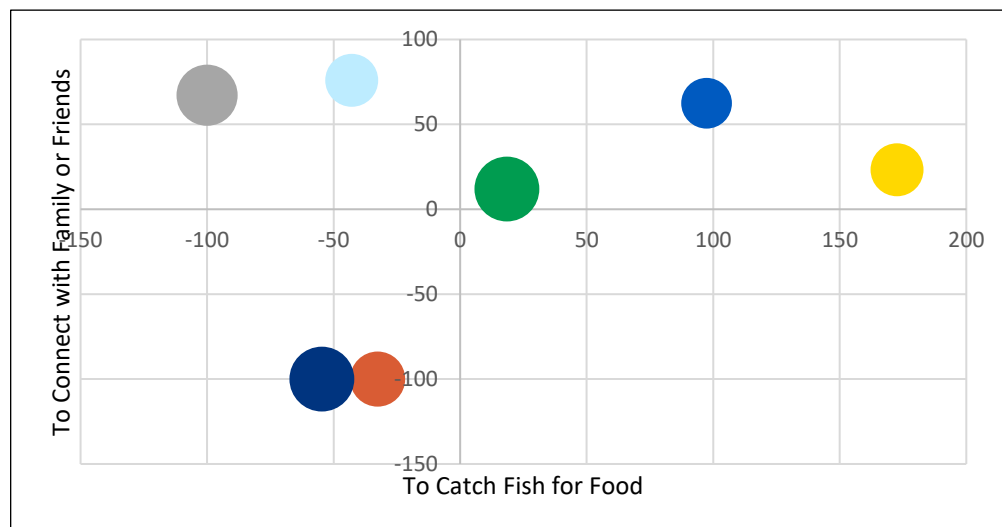
The “Playing Field”

A visual way to compare the personas together is through the use of ‘playing fields.’ By plotting each persona on graphs or ‘playing fields’, based on their key motivations and other characteristics, differences can be highlighted, helping to identify the persona(s) that best fit a specific product or goal. These personas then become one’s target audience. Examples of playing fields are presented here. Additional playing fields can certainly be created using any characteristic or motivation provided for the personas in this report.

Figures 2 & 3 show how playing fields can be used to help visualize the differences between personas. Both present the “To Catch Fish for Food” motivation along the bottom. In the first playing field that compares the desire to catch fish for food to the desire (or motivation) to connect socially, the four personas to the left of the vertical dividing line are below average regarding their interest in fishing as a way to acquire food. Two of these personas – the Occasional and Zen anglers – are below the horizontal dividing line, indicating little interest in using fishing as a means to connect with others. All others show above average tendencies to fish for this reason with the Adventurous Angler being as close to ‘average’ as possible.

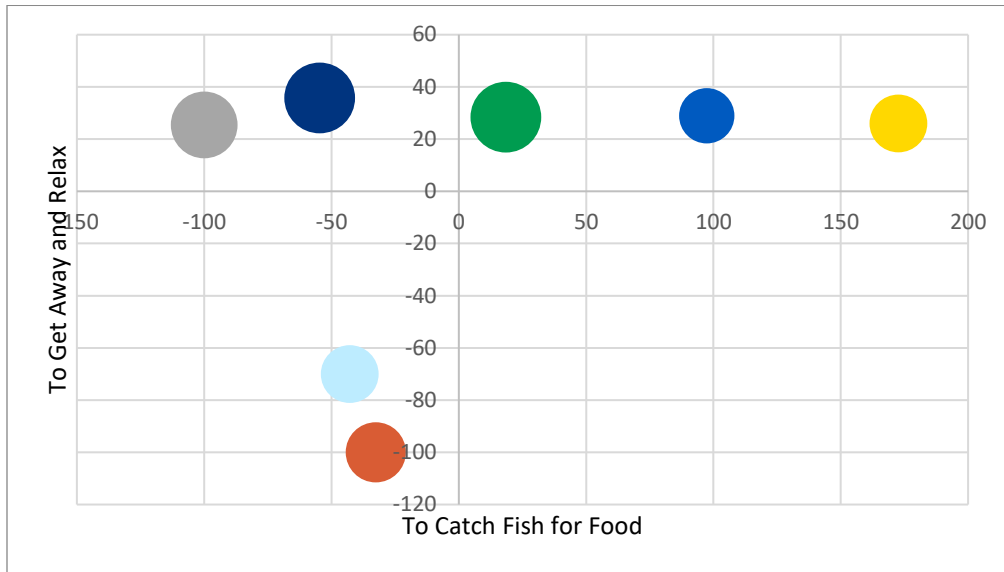
In Figure 3, when we compare the motivation to fish for food to ‘Get Away and Relax,’ we see the Social Dabbler and Zen Angler switch positions, with the Social Dabbler preferring to fish with others while the Zen Angler is less inclined to do so.

FIGURE 2. PLAYING FIELD– CATCHING FISH FOR FOOD & CONNECTING WITH FAMILY OR FRIENDS.



- Traditionalist ■ Occasional Angler ■ Friendly Fisherman ■ Consumptive Angler
- Social Dabbler ■ Adventurous Angler ■ Zen Angler

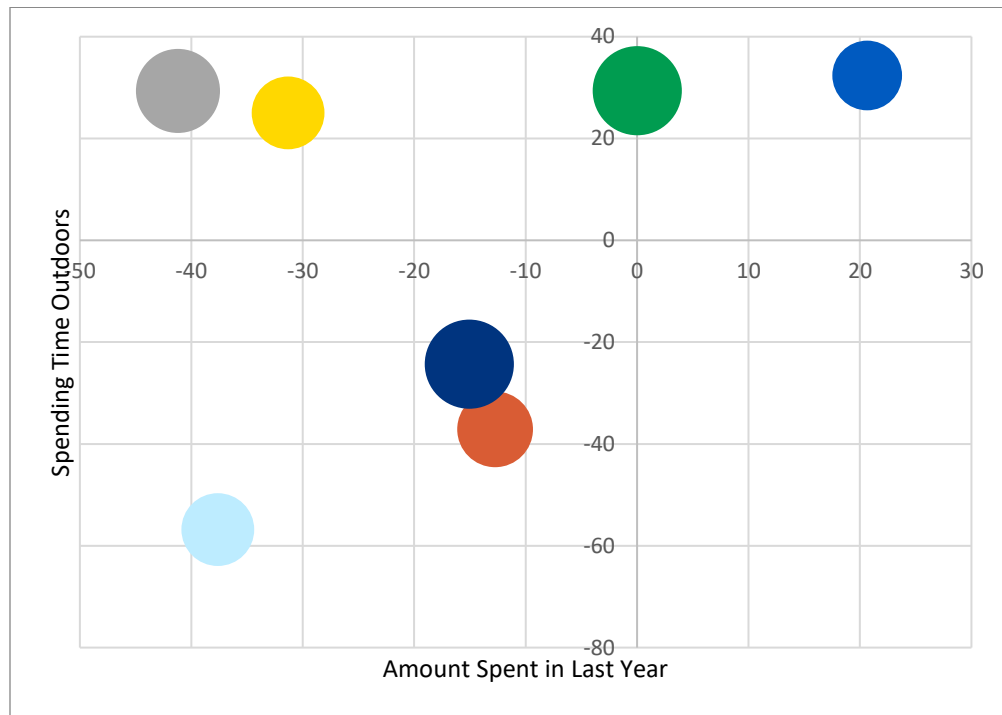
FIGURE 3. PLAYING FIELD OF DIFFERENT PERSONAS – CATCHING FISH FOR FOOD & GETTING AWAY TO RELAX.



- Traditionalist ■ Occasional Angler ■ Friendly Fisherman ■ Consumptive Angler
- Social Dabblers ■ Adventurous Angler ■ Zen Angler

We can also cross any fishing motivation with other types of characteristics. In Figure 4, anglers are plotted based on their desire to spend time outdoors versus their annual spending on fishing tackle. While spending is certainly not a motivation to fish, its inclusion in a playing field can help identify personas that best fit product marketing campaigns. The results show that the desire to be outdoors does not appear to be a key spending driver, with only one persona – The Traditionalist - scoring high in annual spending. However, as seen in the supporting tables (Table 32), the Traditionalist spends much more than the other personas, thus skewing the results, causing other personas to look like ‘light spenders’ as well as being a prime target for premium tackle products. The Zen and Occasional Angler are also decent targets for medium and higher priced tackle. By interpreting the results carefully, and using all the supporting data in this report, tackle businesses can better focus their marketing efforts.

FIGURE 4. PLAYING FIELD OF DIFFERENT PERSONAS – AMOUNT SPENT LAST YEAR & SPENDING TIME OUTDOORS.

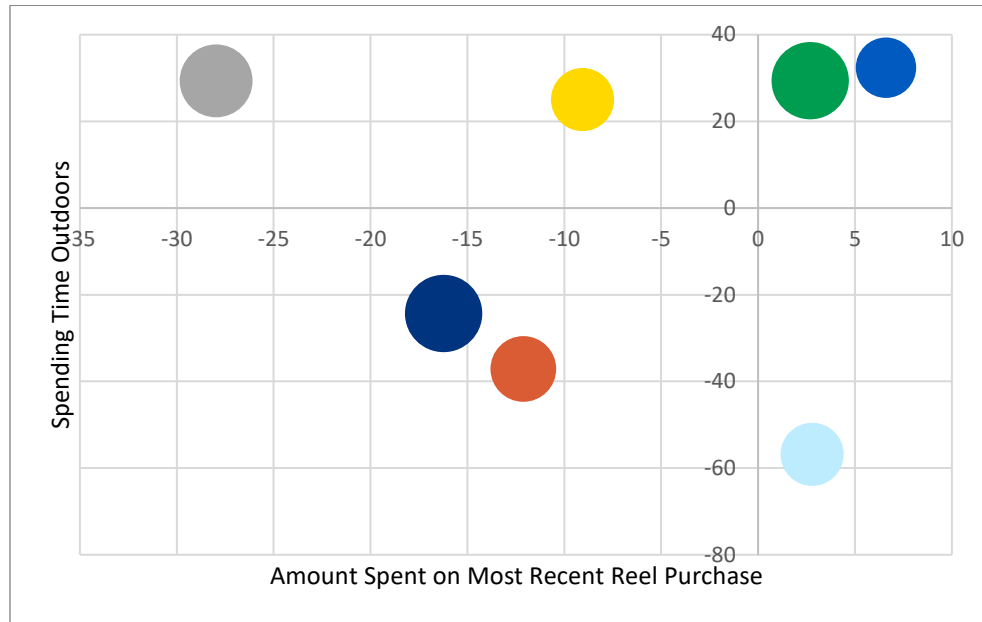


- Traditionalist ■ Occasional Angler ■ Friendly Fisherman ■ Consumptive Angler
- Social Dabbler ■ Adventurous Angler ■ Zen Angler

In Figure 5, we use the amount spent on their most recent reel purchase instead of their annual spending. The results, by targeting a specific product versus their overall annual spending levels, begin to reveal more from a product marketing perspective. The “Social Dabbler,” though they purchase reels at lower rates than other segments and fish less per year, appear to be willing to pay premium prices along with the Traditionalist and Adventurous anglers, even though their annual household incomes are about the same.¹

¹ The sample size for reel purchases by Social Dabblers is low, meaning the results have a higher level of uncertainty compared to other personas.

FIGURE 5. PLAYING FIELD OF DIFFERENT PERSONAS – AMOUNT SPENT ON REEL PURCHASE & SPENDING TIME OUTDOORS.



- Traditionalist ■ Occasional Angler ■ Friendly Fisherman ■ Consumptive Angler
- Social Dabbler ■ Adventurous Angler ■ Zen Angler

Detailed Survey Results

Introduction to Fishing

The following section describes how anglers first became interested in fishing, were first introduced to the sport, and other similar events that helped to shape the angler they are today. Understanding how current anglers first became interested and active in fishing will help inform strategies for bringing new anglers into the sport.

TABLE 10. SELF-REPORTED FISHING EXPERIENCE.

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|---|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Beginner – very limited experience holding a rod and casting | 3.3% | 23.5% | 24.3% | 9.8% | 38.8% | 12.7% | 18.9% |
| Novice – some experience with rod and casting techniques and beginning to experiment with different types of tackle | 9.3% | 27.5% | 30.8% | 25.5% | 25.9% | 25.0% | 26.3% |
| Intermediate experience - comfortable with the rod, casting, and tackle selection in some settings | 40.0% | 28.3% | 33.8% | 41.1% | 26.4% | 37.2% | 34.1% |
| Fairly advanced experience – lots of experience with equipment and techniques in many settings | 33.6% | 13.4% | 9.9% | 17.3% | 5.8% | 21.1% | 18.1% |
| Expert - very experienced with equipment and techniques in all settings | 13.8% | 7.3% | 1.2% | 6.3% | 3.1% | 4.1% | 2.7% |
| Total | N=3279 | N=1302 | N=1093 | N=1267 | N=932 | N=2556 | N=1538 |

TABLE 11. HOW RECENTLY HAVE YOU BEEN FISHING?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|------------------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Within the past year | 87.4% | 43.9% | 41.6% | 59.8% | 31.8% | 67.7% | 44.4% |
| 1 to 3 years ago | 6.0% | 14.1% | 20.3% | 15.8% | 20.7% | 14.0% | 16.2% |
| 4 or 5 years ago | 1.9% | 10.4% | 11.6% | 7.5% | 12.7% | 6.0% | 8.3% |
| 6 to 10 years ago | 1.8% | 11.2% | 9.6% | 5.6% | 12.1% | 5.9% | 11.4% |
| 11 to 20 years ago | 1.6% | 9.6% | 10.4% | 6.2% | 12.8% | 3.8% | 10.9% |
| More than 20 years ago | 1.5% | 10.8% | 6.6% | 5.2% | 9.9% | 2.7% | 8.8% |
| Total | N=2980 | N=1018 | N=755 | N=954 | N=663 | N=2117 | N=1156 |

TABLE 12. HOW MANY DAYS DID YOU FISH IN THE PAST YEAR?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|-------------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| 1 to 5 days | 8.2% | 15.7% | 28.1% | 15.8% | 31.3% | 14.5% | 21.9% |
| 6 to 10 days | 8.8% | 14.6% | 20.7% | 18.8% | 17.9% | 13.4% | 13.5% |
| 11 to 15 days | 8.3% | 7.2% | 8.4% | 14.9% | 12.2% | 10.1% | 12.4% |
| 16 to 20 days | 9.7% | 8.5% | 10.7% | 11.6% | 6.8% | 10.4% | 9.7% |
| 21 to 30 days | 11.6% | 7.8% | 12.2% | 10.2% | 9.0% | 11.3% | 11.2% |
| 31 to 50 days | 17.0% | 14.2% | 7.7% | 14.6% | 9.5% | 15.5% | 11.2% |
| More than 50 days | 36.4% | 32.0% | 12.1% | 14.0% | 13.2% | 24.8% | 20.0% |
| Total | N=2767 | N=567 | N=376 | N=641 | N=241 | N=1740 | N=568 |

TABLE 13. HOW OLD WERE YOU WHEN YOU BEGAN FISHING?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| How old were you when you began fishing? | 7 | 11 | 10 | 9 | 12 | 10 | 10 |

TABLE 14. HOW DID YOU FIRST BECOME INTERESTED IN FISHING?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|---|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| I was introduced to fishing by an older family member | 84.9% | 65.2% | 74.0% | 78.4% | 66.1% | 69.9% | 69.7% |
| I was introduced to fishing by a friend | 7.2% | 14.2% | 14.9% | 13.4% | 16.1% | 16.3% | 16.6% |
| Television shows / movies | 1.7% | 2.5% | 1.5% | 1.9% | 1.8% | 3.3% | 2.0% |
| Magazines or online publications | 0.8% | 1.2% | 0.6% | 0.5% | 0.4% | 0.9% | 1.0% |
| Social media | 0.6% | 3.1% | 0.4% | 0.4% | 3.3% | 0.9% | 1.5% |
| Clubs or organizations (e g Scouts, school club, summer camp) | 0.7% | 3.6% | 2.5% | 1.0% | 2.2% | 2.2% | 2.0% |
| School (PE program, etc.) | 0.1% | 1.0% | 0.8% | 0.4% | 0.9% | 0.6% | 0.8% |
| My child became interested and asked me about fishing | 1.3% | 3.8% | 2.9% | 1.1% | 5.0% | 1.4% | 2.2% |
| Other Write in | 2.7% | 5.5% | 2.4% | 2.9% | 4.2% | 4.5% | 4.2% |
| Total | N=2878 | N=916 | N=636 | N=876 | N=550 | N=1997 | N=1008 |

TABLE 15. WHO DID YOU FIRST GO FISHING WITH?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|---|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| A parent or grandparent | 68.3% | 52.2% | 53.2% | 61.6% | 50.0% | 56.6% | 53.0% |
| A family member (other than parent or grandparent) | 15.6% | 18.9% | 17.9% | 16.5% | 20.6% | 17.4% | 21.6% |
| A friend, or family friend | 12.8% | 17.9% | 22.0% | 18.3% | 22.6% | 18.6% | 18.0% |
| A club or organization (i.e. Boy Scouts, summer camp, church group, etc.) | 0.2% | 1.1% | 1.8% | 0.2% | 1.1% | 2.2% | 1.9% |
| A coworker | 0.2% | 0.7% | 0.6% | 0.6% | 1.1% | 0.9% | 0.8% |
| School or university | 0.0% | 1.2% | 0.4% | 0.3% | 0.3% | 0.8% | 0.6% |
| My child | 1.3% | 3.4% | 2.4% | 0.7% | 2.4% | 0.6% | 1.9% |
| Nobody / by myself | 1.5% | 4.6% | 1.8% | 1.8% | 2.0% | 3.0% | 2.0% |
| Total | N=2817 | N=846 | N=619 | N=845 | N=524 | N=1932 | N=961 |

TABLE 16. THINKING OF THE FISHING EXPERIENCES THAT MADE YOU AN ANGLER, HOW DID YOU FIRST EXPERIENCE FISHING: WHERE DID YOU FISH FROM?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Private boat | 18.8% | 14.2% | 12.6% | 17.3% | 14.9% | 13.6% | 14.7% |
| Party boat / charter trip | 1.4% | 3.9% | 1.1% | 1.2% | 3.1% | 1.9% | 1.7% |
| Boat (non-powered, canoe, kayak) | 5.7% | 9.0% | 6.8% | 6.6% | 6.3% | 6.2% | 5.8% |
| Floating tube | 0.2% | 2.5% | 0.7% | 0.3% | 0.5% | 0.2% | 1.0% |
| Land, shore, beach, pier, dock, bridge, wading, etc. | 71.8% | 65.3% | 76.6% | 72.0% | 70.7% | 75.8% | 73.4% |
| I am not sure / I don't remember | 2.1% | 5.0% | 2.2% | 2.6% | 4.4% | 2.4% | 3.4% |
| Total | N=2819 | N=848 | N=622 | N=843 | N=526 | N=1940 | N=963 |

TABLE 17. HOW OFTEN HAVE YOU FISHED OUTSIDE OF YOUR HOME STATE IN THE PAST YEAR?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--------------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Not at all | 38.7% | 36.2% | 48.1% | 49.9% | 46.7% | 42.0% | 44.6% |
| 1 or 2 trips | 32.0% | 28.5% | 31.8% | 30.9% | 30.0% | 33.2% | 35.6% |
| 3 to 5 trips | 15.8% | 15.0% | 13.1% | 11.0% | 15.0% | 13.4% | 12.7% |
| 6 to 10 trips | 6.6% | 11.0% | 3.1% | 3.1% | 3.2% | 5.5% | 3.8% |
| More than 10 trips | 6.9% | 9.3% | 3.8% | 5.1% | 5.1% | 5.8% | 3.3% |
| Total | N=2638 | N=507 | N=363 | N=601 | N=227 | N=1649 | N=535 |

Note: this question does not specify that the primary purpose of a trip outside of an individual's home state was for the primary purpose of fishing.
 Nonresident fishing activity reported could reflect one activity that respondents engaged in while out of state for a different purpose.

Fishing Activity Preferences

The following section describes the types of fishing activities that anglers prefer. Understanding how personas differ in their fishing activities can help pinpoint areas for market growth.

TABLE 18. DO YOU EXPECT TO GO FISHING IN THE NEXT YEAR?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|-------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Yes | 97.5% | 73.0% | 80.7% | 89.8% | 68.6% | 94.1% | 78.1% |
| No | 2.5% | 27.0% | 19.3% | 10.2% | 31.4% | 5.9% | 21.9% |
| Total | N=3267 | N=1315 | N=1094 | N=1264 | N=932 | N=2565 | N=1542 |

It should be noted that it is common for people to overstate their future intentions, whether for a recreational activity or any type of consumer purchase. Use the results of Tables 19-21 to identify which personas will fish more or less compared to the other personas.

TABLE 19. PERCENTAGE OF TIME FOR TYPES OF FISHING EXPECTED WITHIN THE NEXT YEAR, OR DURING A TYPICAL YEAR?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Freshwater | 68.6% | 59.8% | 67.1% | 66.3% | 59.9% | 67.7% | 64.8% |
| Saltwater | 23.7% | 29.5% | 26.2% | 26.6% | 31.3% | 25.7% | 26.5% |
| Brackish | 7.8% | 10.7% | 6.8% | 7.1% | 8.9% | 6.6% | 8.6% |
| Total | N=3146 | N=1003 | N=906 | N=1133 | N=691 | N=2397 | N=1211 |

TABLE 20. PERCENTAGE OF TIME FOR TYPES OF FISHING TECHNIQUES IN THE NEXT YEAR, OR IN A TYPICAL YEAR?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|---------------------------------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Fishing with live bait | 35.4% | 41.4% | 45.3% | 47.3% | 46.4% | 39.3% | 43.3% |
| Fishing with artificial bait or lures | 53.6% | 45.6% | 45.7% | 43.9% | 43.8% | 51.5% | 46.6% |
| Fly fishing | 11.0% | 13.0% | 8.9% | 8.8% | 9.8% | 9.2% | 10.2% |
| Total | N=3142 | N=999 | N=907 | N=1130 | N=691 | N=2397 | N=1206 |

TABLE 21. FROM WHERE DO YOU TYPICALLY FISH, OR PLAN TO FISH?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Boat (powered) | 71.7% | 52.5% | 50.9% | 60.4% | 47.8% | 61.2% | 50.1% |
| Boat (non-powered) | 33.1% | 19.9% | 23.4% | 27.0% | 19.0% | 29.1% | 22.1% |
| Floating tube | 8.0% | 6.1% | 4.2% | 6.1% | 4.5% | 3.6% | 3.6% |
| Land, shore, beach, pier, dock, bridge, wading, etc. | 83.3% | 72.3% | 89.7% | 86.0% | 80.0% | 81.9% | 78.7% |
| Other Please describe | 5.2% | 1.7% | 1.6% | 2.8% | 1.5% | 3.1% | 2.1% |
| Total | N=3171 | N=1021 | N=910 | N=1142 | N=695 | N=2423 | N=1221 |

TABLE 22. WHICH FRESHWATER SPECIES DO YOU TYPICALLY TARGET?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Bass (largemouth, smallmouth, white, sunshine, hybrid, etc.) | 85.8% | 65.7% | 65.2% | 69.9% | 63.3% | 80.0% | 66.9% |
| Carp | 12.4% | 9.0% | 11.5% | 10.3% | 10.1% | 9.9% | 11.7% |
| Catfish | 41.7% | 36.2% | 42.3% | 48.3% | 37.8% | 36.5% | 38.5% |
| Perch or Panfish (crappie, sunfish, bluegill/bream) | 60.4% | 31.5% | 31.9% | 53.1% | 33.5% | 46.4% | 36.5% |
| Pickrel, pike, or muskie | 21.6% | 6.5% | 7.9% | 11.7% | 7.5% | 15.7% | 9.9% |
| Salmon | 20.8% | 12.2% | 11.3% | 15.4% | 10.7% | 12.7% | 13.0% |
| Saugeye | 5.8% | 1.1% | 2.0% | 3.4% | 2.1% | 3.5% | 2.7% |
| Steelhead | 12.5% | 2.6% | 3.7% | 5.7% | 3.0% | 5.2% | 3.9% |
| Sturgeon | 5.5% | 1.8% | 1.8% | 2.7% | 1.9% | 1.8% | 1.6% |
| Trout | 47.5% | 32.5% | 39.1% | 43.9% | 33.5% | 40.3% | 35.6% |
| Walleye | 31.7% | 13.6% | 15.6% | 26.0% | 13.6% | 24.1% | 16.3% |
| Other freshwater species | 14.5% | 13.0% | 10.0% | 13.6% | 11.9% | 10.7% | 7.9% |
| Total | N=2727 | N=757 | N=588 | N=804 | N=465 | N=1853 | N=887 |

TABLE 23. WHICH SALTWATER SPECIES DO YOU TYPICALLY TARGET?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Amberjack | 11.5% | 8.2% | 7.0% | 5.2% | 4.7% | 6.3% | 4.5% |
| Black Drum | 17.5% | 9.9% | 6.4% | 9.3% | 7.8% | 10.9% | 10.6% |
| Bluefish | 23.5% | 24.5% | 19.5% | 18.5% | 17.9% | 24.8% | 23.1% |
| Cod (all species) | 24.2% | 18.1% | 31.3% | 24.1% | 19.1% | 24.2% | 22.2% |
| Flounder | 44.1% | 30.4% | 41.7% | 38.7% | 33.8% | 42.7% | 39.8% |
| Grouper, snapper, sea bass | 37.8% | 27.0% | 24.0% | 27.9% | 23.7% | 31.4% | 20.7% |
| Halibut | 18.5% | 14.6% | 14.3% | 15.7% | 11.2% | 13.7% | 12.8% |
| Mackerel (king, Spanish, Boston, cero, etc.) | 25.5% | 12.3% | 10.7% | 16.2% | 12.5% | 12.8% | 9.8% |
| Permit | 3.3% | 4.0% | 5.4% | 1.9% | 1.1% | 3.5% | 3.5% |
| Redfish, red drum | 40.3% | 18.9% | 18.5% | 32.2% | 14.9% | 28.1% | 24.3% |
| Rockfish (Pacific coast only) | 17.0% | 1.9% | 4.6% | 13.2% | 6.1% | 6.6% | 5.8% |
| Scup | 4.7% | 4.8% | 6.0% | 2.0% | 1.5% | 3.0% | 2.2% |
| Shark | 16.7% | 9.2% | 10.3% | 6.7% | 5.9% | 7.8% | 8.5% |
| Snook | 13.4% | 9.5% | 10.8% | 6.2% | 7.1% | 11.4% | 10.9% |
| Speckled Trout | 31.0% | 16.3% | 19.0% | 26.0% | 17.5% | 26.9% | 15.5% |
| Spotted seatrout or weakfish | 16.2% | 7.7% | 6.5% | 10.3% | 6.2% | 9.3% | 9.5% |
| Striped bass | 39.3% | 27.4% | 27.8% | 29.5% | 24.3% | 35.7% | 29.9% |
| Tarpon | 9.1% | 11.3% | 8.7% | 4.7% | 6.3% | 6.5% | 9.6% |
| Yellow tail | 19.1% | 13.7% | 13.4% | 13.1% | 12.7% | 13.8% | 13.9% |
| Other saltwater species | 23.0% | 15.4% | 9.0% | 18.8% | 14.4% | 15.0% | 14.4% |
| Total | N=1123 | N=262 | N=210 | N=333 | N=173 | N=699 | N=302 |

TABLE 24. WHICH FACTORS DO YOU CONSIDER MOST IMPORTANT WHEN SELECTING A FISHING SITE?

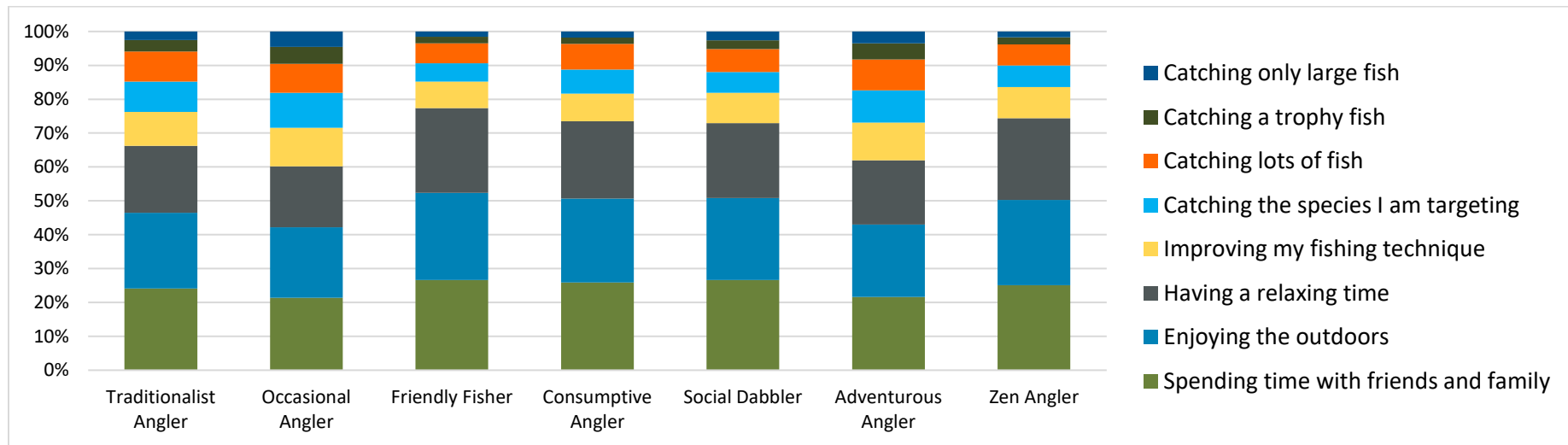
| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|---|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Shorter travel distance / close to home | 19.9% | 15.9% | 24.5% | 23.3% | 19.6% | 21.5% | 17.5% |
| Abundance of fish | 35.8% | 24.9% | 27.2% | 27.4% | 24.3% | 32.7% | 21.6% |
| New site / going somewhere different | 15.3% | 9.4% | 5.4% | 6.2% | 3.1% | 18.0% | 9.2% |
| Water quality/conditions | 21.3% | 19.1% | 24.5% | 22.9% | 16.2% | 23.2% | 26.7% |
| Diversity of fish species | 15.8% | 8.6% | 6.9% | 7.2% | 8.6% | 11.7% | 10.0% |
| Opportunity to catch big fish | 39.1% | 20.0% | 16.4% | 22.6% | 12.5% | 35.1% | 20.9% |
| The scenic beauty | 22.7% | 16.3% | 36.1% | 21.2% | 20.0% | 16.8% | 26.5% |
| Regular fish stocking | 5.1% | 7.8% | 3.1% | 8.9% | 6.1% | 6.1% | 4.5% |
| People on-site to help | 2.6% | 1.9% | 2.4% | 5.0% | 8.4% | 3.0% | 3.3% |
| Education programs offered | 1.4% | 1.7% | 1.5% | 0.4% | 1.2% | 0.4% | 0.0% |
| Lack of crowds | 23.2% | 26.7% | 38.2% | 34.0% | 30.0% | 29.6% | 34.3% |
| Learning of positive fishing information (i.e. a tip about a hotspot from a friend, coworker, etc.) | 14.3% | 8.6% | 6.5% | 9.4% | 6.1% | 10.3% | 4.3% |
| No access fees | 11.0% | 15.3% | 16.6% | 19.2% | 16.0% | 14.9% | 18.1% |
| Other activities nearby (playground) | 0.2% | 4.4% | 5.6% | 0.5% | 6.3% | 3.1% | 2.4% |
| Familiar site / I already have access or permission | 24.1% | 14.9% | 21.5% | 28.7% | 31.3% | 15.6% | 17.8% |
| Easy to access | 20.1% | 26.2% | 24.6% | 23.8% | 34.3% | 26.6% | 28.0% |
| Amenities (public bathrooms, picnic tables, parking lot, etc.) | 6.0% | 7.8% | 9.2% | 12.7% | 16.3% | 7.4% | 14.0% |
| Safety | 15.3% | 18.0% | 13.4% | 11.3% | 17.8% | 13.8% | 15.4% |
| Total | N=693 | N=231 | N=168 | N=186 | N=122 | N=474 | N=247 |

Reactivating and Retaining Participants

Understanding the barriers faced by anglers will help direct recruitment and reactivation strategies. This section describes reasons why anglers may not fish as much as they would like, and what can be done to address these barriers, ultimately resulting in increased participation.

The following figure displays the results from a Max-Diff experiment. While angler motivations define the personas, the following experiment describes how they value various characteristics of a fishing trip. For instance, while the desire to catch and keep fish motivates the Consumptive Angler to get on the water, they derive enjoyment from having a relaxing time outside with their family and friends. The details of the experiment can be found in Appendix 1: Max-Diff Results. Understanding the desired experience will highlight areas of focus for groups managing the quality of fishing activities.

FIGURE 6. WHICH OF THE FOLLOWING CHARACTERISTICS MAKE UP A GOOD FISHING EXPERIENCE, AS YOU DEFINE IT?



The following table presents the results based on a scale of 1 (“I would definitely not go”) to 4 (“I would definitely go”) in an effort to better understand how past fishing experiences could influence the decision to continue participating.

TABLE 25. CONSIDERING YOUR NEXT FISHING OUTING, HOW WOULD YOUR PLANS BE AFFECTED IF YOU DIDN’T CATCH ANY FISH ON YOUR PAST TRIPS?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|---------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| 1 or 2 trips | 3.6 | 2.5 | 2.6 | 3.3 | 2.9 | 3.6 | 3.1 |
| 3 to 5 trips | 3.5 | 3.0 | 3.3 | 3.5 | 2.6 | 3.1 | 2.9 |
| 6 to 10 trips | 3.4 | 2.8 | 3.3 | 3.2 | 2.5 | 3.2 | 2.8 |
| 10+ trips | 3.6 | 2.4 | 3.1 | 3.0 | 2.4 | 3.3 | 2.9 |

TABLE 26. CONSIDERING YOUR NEXT FISHING OUTING, HOW WOULD YOUR PLANS BE AFFECTED IF YOU DIDN’T CATCH ANY FISH ON YOUR PAST TRIPS?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|---------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| 1 or 2 trips | N=752 | N=232 | N=156 | N=249 | N=126 | N=512 | N=267 |
| 3 to 5 trips | N=752 | N=218 | N=168 | N=219 | N=126 | N=472 | N=246 |
| 6 to 10 trips | N=743 | N=247 | N=166 | N=231 | N=157 | N=589 | N=272 |
| 10+ trips | N=798 | N=263 | N=165 | N=217 | N=159 | N=538 | N=252 |

The results of the previous two questions illustrate that many anglers do not require catching many fish, only large fish, or trophy fish to have fun on the water. Even those personas who are less motivated by social interaction suggest that having fun with friends and family while fishing can make for a great day.

TABLE 27. WHAT OTHER ACTIVITIES OR HOBBIES TYPICALLY COMPETE AGAINST FISHING FOR YOUR TIME?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| My child's activities (sports, etc.) | 28.1% | 18.0% | 25.3% | 14.4% | 19.0% | 18.4% | 15.3% |
| Other clubs, organizations, groups in which I participate (i.e. church groups, sports leagues, etc.) | 17.1% | 18.8% | 13.6% | 16.6% | 17.9% | 15.9% | 14.9% |
| Other outdoor recreation activities | 39.9% | 33.8% | 40.6% | 43.6% | 29.9% | 33.9% | 31.4% |
| Family obligations | 70.4% | 41.2% | 60.4% | 63.0% | 64.1% | 60.6% | 51.5% |
| Work obligations | 60.7% | 43.6% | 40.9% | 53.3% | 44.8% | 57.0% | 43.2% |
| School | 6.3% | 12.3% | 10.0% | 4.5% | 18.2% | 9.8% | 6.6% |
| Relaxing at home (television, reading, etc.) | 36.9% | 44.4% | 47.4% | 32.7% | 50.8% | 42.9% | 51.1% |
| Other Please describe | 9.4% | 9.1% | 9.6% | 9.4% | 6.1% | 7.2% | 6.5% |
| Total | N=674 | N=189 | N=149 | N=217 | N=143 | N=476 | N=243 |

TABLE 28. WHICH OF THE FOLLOWING REASONS HAS PREVENTED YOU FROM FISHING AT LEAST ONCE IN THE PAST YEAR?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Did not have anybody to go with | 20.3% | 14.6% | 34.7% | 29.6% | 20.8% | 26.6% | 21.7% |
| I was not sure where to go | 8.1% | 7.1% | 8.5% | 7.3% | 10.9% | 16.2% | 9.5% |
| Did not have enough money | 15.7% | 16.6% | 15.3% | 12.6% | 8.4% | 21.0% | 14.9% |
| I was not successful, so I did not go again | 2.1% | 8.8% | 2.3% | 0.8% | 5.7% | 2.9% | 3.2% |
| Fishing regulations have gotten too restrictive | 6.6% | 8.2% | 8.3% | 8.3% | 11.2% | 6.3% | 3.4% |
| Health issues | 19.8% | 12.4% | 19.8% | 20.8% | 13.5% | 11.6% | 15.3% |
| Weather | 50.4% | 28.1% | 33.5% | 46.0% | 34.1% | 48.1% | 33.8% |
| Did not have the right equipment | 6.0% | 19.3% | 13.9% | 10.4% | 16.0% | 14.5% | 15.0% |
| Other. Please describe. | 8.2% | 5.0% | 7.1% | 6.5% | 8.5% | 9.7% | 5.3% |
| None of the above – I have not been prevented from fishing at all in the last year | 23.0% | 28.2% | 21.1% | 20.1% | 16.9% | 18.5% | 20.6% |
| Total | N=674 | N=189 | N=148 | N=219 | N=144 | N=475 | N=244 |

TABLE 29. EVEN IF YOU ARE AN AVID ANGLER, WHICH OF THE FOLLOWING MIGHT ENCOURAGE YOU TO FISH MORE OFTEN?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|---|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| An invitation from a friend or family member to go fish | 80.7% | 45.6% | 80.7% | 76.5% | 58.7% | 77.5% | 66.7% |
| Fishing instruction to improve my knowledge / methods / technique | 42.0% | 30.1% | 24.0% | 20.0% | 15.9% | 41.5% | 16.8% |
| Access to rental or loaner fishing equipment | 18.9% | 8.9% | 15.6% | 11.9% | 13.6% | 19.8% | 13.6% |
| Information and insights from local fishing experts | 43.7% | 15.5% | 16.4% | 26.9% | 12.1% | 34.7% | 15.1% |
| A special beginner event for first-time anglers only | 12.1% | 12.7% | 10.8% | 5.3% | 10.7% | 12.5% | 8.6% |
| Stories about fishing in local online media (blogs, social media, websites) | 27.7% | 8.8% | 5.3% | 11.8% | 8.3% | 15.8% | 8.1% |
| Stories about fishing in local print media | 23.5% | 4.9% | 9.0% | 12.4% | 2.5% | 10.0% | 6.9% |
| Other. Please describe. | 6.0% | 4.1% | 5.3% | 5.8% | 2.2% | 6.9% | 2.2% |
| None of the above | 7.5% | 20.4% | 6.6% | 11.4% | 17.3% | 6.9% | 15.1% |
| Total | N=673 | N=187 | N=149 | N=219 | N=144 | N=474 | N=244 |

The following illustration details the results from Table 30 (previous page). Here, the methods for increasing the participation by each persona are identified by the relative size of each slice. Note that the color of each slice is constant across every persona.

FIGURE 7. WAYS TO INCREASE PARTICIPATION, BY PERSONA.

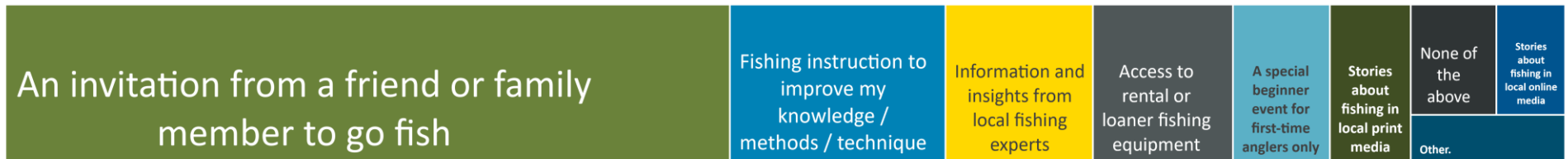
TRADITIONALIST ANGLER



OCCASIONAL ANGLER



FRIENDLY FISHERMAN



CONSUMPTIVE ANGLER

| | | | | | | | |
|---|---|---|--|--|---|-------------------|---|
| An invitation from a friend or family member to go fish | Information and insights from local fishing experts | Fishing instruction to improve my knowledge / methods / technique | Stories about fishing in local print media | Access to rental or loaner fishing equipment | Stories about fishing in local online media | None of the above | Other. <small>A special beginner event for first-time anglers only</small> |
|---|---|---|--|--|---|-------------------|---|

SOCIAL DABBLER

| | | | | | | | |
|---|-------------------|---|--|---|--|---|--------|
| An invitation from a friend or family member to go fish | None of the above | Fishing instruction to improve my knowledge / methods / technique | Access to rental or loaner fishing equipment | Information and insights from local fishing experts | A special beginner event for first-time anglers only | Stories about fishing in local online media <small>Stories about fishing in local print...</small> | Other. |
|---|-------------------|---|--|---|--|---|--------|

ADVENTUROUS ANGLER

| | | | | | | | |
|---|---|---|--|---|--|--|--|
| An invitation from a friend or family member to go fish | Fishing instruction to improve my knowledge / methods / technique | Information and insights from local fishing experts | Access to rental or loaner fishing equipment | Stories about fishing in local online media | A special beginner event for first-time anglers only | Stories about fishing in local print media | Other. <small>None of the above</small> |
|---|---|---|--|---|--|--|--|

ZEN ANGLER

| | | | | | | | |
|---|---|---|-------------------|--|--|---|---|
| An invitation from a friend or family member to go fish | Fishing instruction to improve my knowledge / methods / technique | Information and insights from local fishing experts | None of the above | Access to rental or loaner fishing equipment | A special beginner event for first-time anglers only | Stories about fishing in local online media | Stories about fishing in local print media <small>Other.</small> |
|---|---|---|-------------------|--|--|---|---|

Purchases

The following section describes the purchasing patterns of each persona.

TABLE 30. HAVE YOU PURCHASED ANY FISHING RELATED ITEMS IN THE PAST YEAR?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|-------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Yes | 92.7% | 53.6% | 49.1% | 57.0% | 33.5% | 68.8% | 48.2% |
| No | 7.3% | 46.4% | 50.9% | 43.0% | 66.5% | 31.2% | 51.8% |
| Total | N=700 | N=225 | N=154 | N=208 | N=140 | N=519 | N=234 |

FIGURE 8. PURCHASE HABITS BY PERSONA.

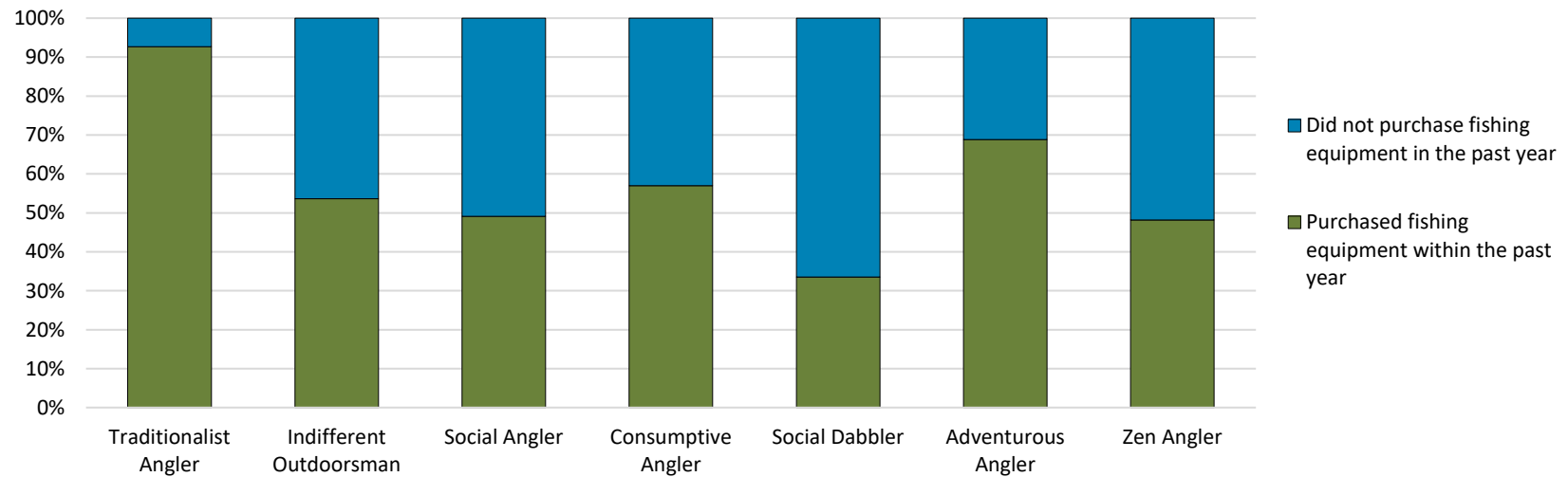


TABLE 31. HOW MUCH HAVE YOU SPENT ON FISHING EQUIPMENT WITHIN THE PAST YEAR IN TOTAL?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--------------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Under \$100 | 13.4% | 12.1% | 35.7% | 21.2% | 46.9% | 17.1% | 18.7% |
| \$100 to \$249 | 20.6% | 34.2% | 23.5% | 27.3% | 18.4% | 20.8% | 21.8% |
| \$250 to \$499 | 16.3% | 19.2% | 14.8% | 20.1% | 12.6% | 21.1% | 19.1% |
| \$500 to \$999 | 18.3% | 16.2% | 13.4% | 19.8% | 8.8% | 18.7% | 22.3% |
| \$1,000 to \$2,499 | 17.9% | 8.3% | 7.8% | 5.3% | 6.3% | 10.9% | 10.3% |
| \$2,500 to \$4,999 | 6.7% | 5.6% | 3.0% | 3.1% | 3.7% | 6.0% | 4.2% |
| More than \$5,000 | 7.0% | 4.4% | 1.7% | 3.2% | 3.2% | 5.5% | 3.7% |
| Total | N=661 | N=139 | N=91 | N=141 | N=50 | N=431 | N=122 |

**Note: these estimates include only those anglers who spent money on fishing equipment within the past year.*

Those who did not make purchases are excluded from this table, and the remainder of the tables in this 'Purchases' section.

TABLE 32. WHICH OF THE FOLLOWING ITEMS HAVE YOU PURCHASED WITHIN THE PAST YEAR?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Reel | 57.1% | 51.2% | 34.3% | 42.6% | 35.1% | 56.3% | 48.8% |
| Rod | 61.2% | 49.5% | 37.6% | 51.7% | 60.0% | 57.2% | 51.8% |
| Combo (rod/reel) | 35.4% | 27.7% | 34.9% | 39.4% | 15.8% | 31.9% | 30.2% |
| Fishing line | 87.1% | 68.7% | 70.2% | 86.8% | 57.7% | 81.9% | 77.2% |
| Lures and baits (hard, soft, spinner, dough, jig, live bait - not fly fishing) | 89.7% | 64.7% | 83.6% | 94.5% | 66.8% | 90.5% | 84.1% |
| Fishing electronics (GPS, sonar, fish finders) | 28.3% | 25.2% | 14.9% | 25.3% | 17.3% | 24.7% | 26.4% |
| Total | N=657 | N=138 | N=90 | N=140 | N=46 | N=429 | N=122 |

TABLE 33. HOW MUCH DID YOU SPEND ON YOUR MOST RECENT REEL PURCHASE?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|----------------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Under \$30 00 | 1.4% | 6.2% | 22.0% | 9.1% | 0.0% | 7.7% | 10.5% |
| \$30 00 to \$49 99 | 11.6% | 10.5% | 14.6% | 26.1% | 28.5% | 6.1% | 9.7% |
| \$50 00 to \$69 99 | 17.6% | 24.3% | 3.9% | 12.4% | 11.7% | 14.0% | 19.3% |
| \$70 00 to \$89 99 | 9.6% | 5.7% | 14.0% | 3.1% | 13.8% | 10.6% | 13.1% |
| \$90 00 to \$109 99 | 10.6% | 19.1% | 12.0% | 12.3% | 0.0% | 10.8% | 16.6% |
| \$110 00 to \$129 99 | 9.1% | 7.0% | 5.2% | 4.6% | 5.4% | 15.5% | 5.3% |
| \$130 00 to \$149 99 | 9.0% | 2.9% | 5.9% | 12.1% | 11.2% | 7.1% | 3.2% |
| \$150 00 to \$199 99 | 13.1% | 10.2% | 7.6% | 13.0% | 14.4% | 14.2% | 6.7% |
| \$200 to \$299 99 | 10.0% | 10.1% | 9.0% | 1.5% | 12.0% | 9.0% | 7.5% |
| \$300 or more | 7.1% | 4.0% | 0.0% | 4.8% | 2.9% | 4.4% | 8.1% |
| Not sure | 0.7% | 0.0% | 5.8% | 0.9% | 0.0% | 0.6% | 0.0% |
| Total | N=425 | N=85 | N=36 | N=64 | N=23 | N=280 | N=62 |

TABLE 34. HOW MUCH DID YOU SPEND ON YOUR MOST RECENT FISHING ROD PURCHASE?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|----------------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Under \$30 00 | 3.4% | 4.2% | 18.0% | 8.1% | 13.3% | 6.4% | 5.8% |
| \$30 00 to \$49 99 | 13.1% | 23.1% | 6.9% | 23.1% | 9.1% | 11.0% | 12.2% |
| \$50 00 to \$69 99 | 8.5% | 15.9% | 13.9% | 22.6% | 22.6% | 9.6% | 19.9% |
| \$70 00 to \$89 99 | 8.1% | 4.8% | 9.7% | 1.7% | 13.1% | 10.0% | 8.6% |
| \$90 00 to \$109 99 | 17.4% | 13.7% | 7.3% | 11.9% | 12.6% | 18.1% | 20.8% |
| \$110 00 to \$129 99 | 15.5% | 8.9% | 15.7% | 11.2% | 7.5% | 15.2% | 5.7% |
| \$130 00 to \$149 99 | 8.5% | 6.5% | 11.1% | 5.5% | 3.8% | 6.9% | 3.7% |
| \$150 00 to \$199 99 | 10.6% | 7.0% | 4.1% | 1.8% | 7.0% | 8.6% | 7.2% |
| \$200 to \$299 99 | 8.6% | 12.7% | 9.1% | 13.4% | 7.1% | 8.1% | 8.2% |
| \$300 or more | 6.0% | 3.2% | 2.0% | 0.0% | 3.9% | 4.8% | 7.9% |
| Not sure | 0.3% | 0.0% | 2.3% | 0.7% | 0.0% | 1.4% | 0.0% |
| Total | N=436 | N=75 | N=35 | N=68 | N=29 | N=272 | N=66 |

TABLE 35. MUCH DID YOU SPEND ON YOUR MOST RECENT ROD/REEL COMBO PURCHASE?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|----------------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Under \$30 00 | 4.7% | 7.3% | 11.8% | 18.3% | 0.0% | 8.0% | 9.8% |
| \$30 00 to \$49 99 | 7.9% | 3.1% | 18.6% | 13.5% | 12.5% | 7.3% | 18.0% |
| \$50 00 to \$69 99 | 11.2% | 28.3% | 19.0% | 13.2% | 6.6% | 19.5% | 13.1% |
| \$70 00 to \$89 99 | 9.3% | 8.1% | 22.9% | 17.9% | 6.9% | 13.4% | 12.0% |
| \$90 00 to \$109 99 | 18.6% | 8.6% | 0.0% | 10.0% | 14.9% | 14.2% | 8.7% |
| \$110 00 to \$129 99 | 12.6% | 25.8% | 6.3% | 8.0% | 27.9% | 10.8% | 5.3% |
| \$130 00 to \$149 99 | 13.1% | 0.0% | 0.0% | 3.9% | 0.0% | 4.4% | 12.4% |
| \$150 00 to \$199 99 | 11.7% | 9.1% | 11.4% | 8.9% | 13.7% | 6.0% | 4.1% |
| \$200 to \$299 99 | 4.9% | 2.9% | 4.2% | 4.2% | 0.0% | 9.3% | 11.3% |
| \$300 or more | 4.8% | 3.7% | 5.8% | 1.2% | 11.0% | 3.5% | 5.2% |
| Not sure | 1.3% | 3.0% | 0.0% | 1.0% | 6.5% | 3.6% | 0.0% |
| Total | N=217 | N=33 | N=25 | N=48 | N=8 | N=109 | N=31 |

TABLE 36. WHAT TYPE OF LINE HAVE YOU PURCHASED WITHIN THE PAST YEAR?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--------------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Monofilament | 65.2% | 60.9% | 48.2% | 63.6% | 68.6% | 62.1% | 51.6% |
| Unifilament | 6.2% | 8.4% | 9.1% | 2.2% | 6.6% | 4.3% | 8.6% |
| Braid or superline | 67.0% | 64.7% | 42.3% | 54.5% | 57.7% | 63.1% | 59.2% |
| Fluorocarbon | 64.3% | 41.0% | 58.0% | 48.3% | 46.0% | 57.7% | 59.8% |
| Other | 2.1% | 2.0% | 0.0% | 1.1% | 3.3% | 4.6% | 0.4% |
| Not Sure | 6.9% | 6.2% | 14.9% | 6.7% | 5.3% | 8.0% | 2.6% |
| Total | N=598 | N=107 | N=64 | N=117 | N=33 | N=369 | N=98 |

TABLE 37. WHERE DO YOU TYPICALLY PURCHASE FISHING EQUIPMENT?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Farm/ranch store (Big R, Tractor Supply, etc.) | 9.0% | 7.9% | 6.4% | 7.8% | 17.1% | 7.7% | 11.4% |
| Fishing shows or expos | 17.8% | 14.6% | 8.6% | 11.0% | 13.3% | 9.7% | 17.2% |
| General sporting Goods (Dick's, Academy, etc.) | 49.0% | 40.2% | 30.9% | 35.7% | 32.8% | 39.5% | 33.1% |
| Local bait & tackle shop | 63.1% | 29.6% | 48.9% | 52.5% | 17.0% | 49.1% | 39.3% |
| Mass Merchant (Wal-Mart, Sam's Club) | 36.8% | 26.0% | 34.8% | 42.9% | 30.7% | 33.7% | 26.5% |
| Outdoor Specialty Store (Bass Pro, Cabela's, etc.) | 65.6% | 48.2% | 50.4% | 55.6% | 39.7% | 58.0% | 59.4% |
| Printed catalog (Cabela's, Bass Pro, etc.) | 13.9% | 13.3% | 19.3% | 13.9% | 13.9% | 9.6% | 15.9% |
| Website | 40.7% | 23.7% | 21.8% | 32.8% | 28.8% | 38.4% | 34.3% |
| Other | 3.0% | 2.8% | 2.0% | 2.4% | 3.8% | 4.0% | 0.8% |
| Total | N=657 | N=138 | N=90 | N=137 | N=49 | N=424 | N=122 |

Media Consumption

The following section describes the types of media that anglers consume. With an understanding of why anglers participate in fishing, the following communication channels can be used to push messaging and imagery that better connects with each unique persona.

TABLE 38. WHICH TYPES OF MEDIA HAVE YOU USED FOR FISHING RELATED ENTERTAINMENT IN THE PAST YEAR?

| | Traditionalist | Occasional Angler | Social Angler | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--|----------------|-------------------|---------------|--------------------|----------------|--------------------|------------|
| Television | 65.8% | 31.2% | 29.2% | 36.4% | 24.0% | 49.7% | 33.2% |
| Magazines - print | 60.0% | 31.7% | 20.5% | 27.4% | 14.8% | 36.5% | 29.1% |
| Websites (blogs, online magazines, etc.) | 65.0% | 35.2% | 29.4% | 40.3% | 20.9% | 50.0% | 24.7% |
| Social media | 61.6% | 27.4% | 26.9% | 33.4% | 22.1% | 43.5% | 22.9% |
| Podcasts | 18.6% | 10.2% | 7.8% | 7.4% | 4.8% | 10.4% | 7.3% |
| State fishing regulation guides | 57.5% | 23.4% | 24.2% | 35.7% | 20.0% | 39.8% | 21.1% |
| Books | 25.0% | 10.9% | 7.8% | 9.9% | 7.5% | 13.0% | 8.8% |
| Newspaper | 13.8% | 7.3% | 7.1% | 6.4% | 4.1% | 9.3% | 6.6% |
| Radio | 12.4% | 7.3% | 6.3% | 6.1% | 6.4% | 3.7% | 2.9% |
| eNewsletter | 15.0% | 6.6% | 4.0% | 5.6% | 3.2% | 12.6% | 7.0% |
| Other. Please describe. | 3.9% | 2.6% | 0.3% | 2.7% | 0.6% | 2.2% | 0.4% |
| None | 9.5% | 32.8% | 40.5% | 16.8% | 46.5% | 14.4% | 34.3% |
| Total | N=725 | N=225 | N=153 | N=230 | N=125 | N=468 | N=242 |

FIGURE 9. MEDIA USAGE BY PERSONA.

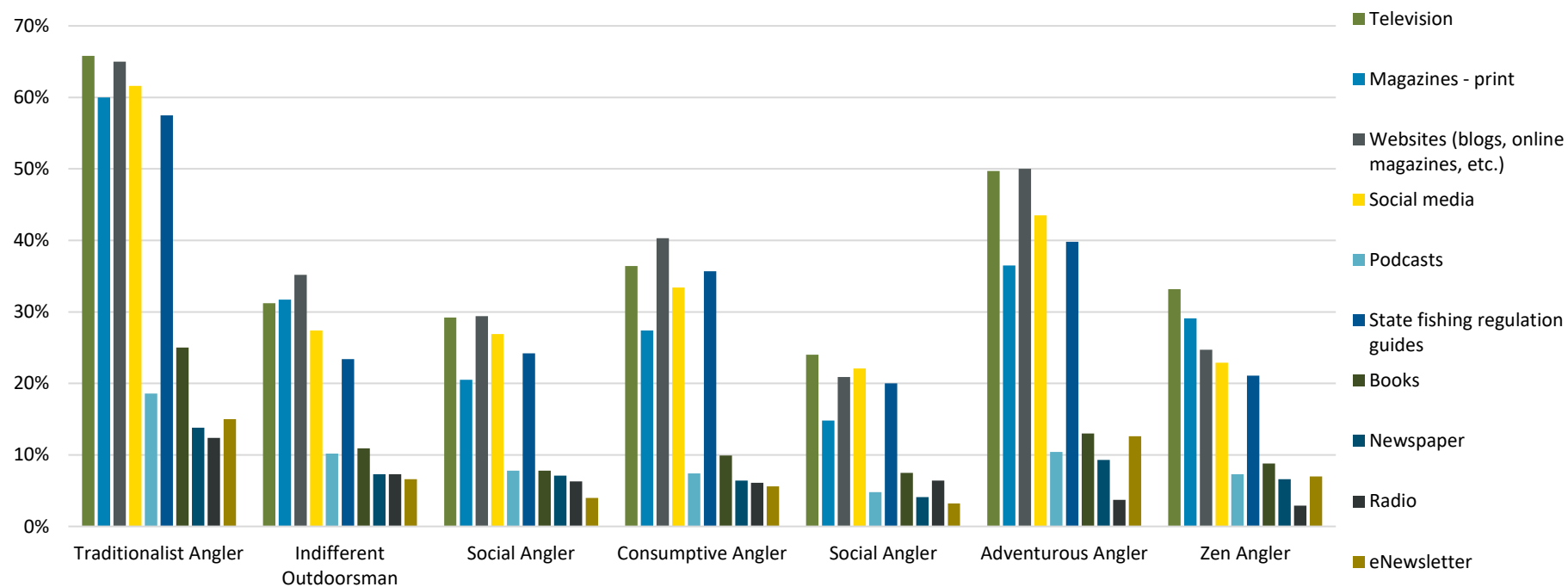


TABLE 39. WHAT TYPE OF FISHING RELATED WEBSITES DO YOU TYPICALLY VISIT?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Online magazines (Field & Stream, Bass Angler, etc.) | 72.9% | 46.3% | 38.7% | 45.7% | 51.3% | 59.3% | 66.8% |
| Forums/chat rooms | 46.7% | 36.0% | 28.2% | 23.3% | 23.8% | 38.6% | 38.1% |
| Websites for manufacturers or retailers | 73.0% | 66.0% | 49.8% | 49.7% | 60.4% | 69.5% | 64.9% |
| State fish & wildlife sites | 76.9% | 59.7% | 70.4% | 70.4% | 68.5% | 59.8% | 56.2% |
| None of the above | 1.6% | 5.8% | 6.9% | 5.1% | 5.1% | 1.7% | 1.1% |
| All of the above | 21.8% | 13.0% | 3.8% | 5.6% | 10.8% | 11.2% | 7.0% |
| Total | N=516 | N=94 | N=54 | N=100 | N=30 | N=292 | N=66 |

TABLE 40. WHAT TYPE OF FISHING RELATED TELEVISION DO YOU TYPICALLY WATCH?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| General fishing | 69.1% | 49.9% | 55.9% | 61.5% | 60.7% | 64.3% | 42.0% |
| Fishing – species specific (i.e. Lindner's Fishing Edge, Major League Fishing, etc.) | 84.3% | 60.8% | 46.2% | 62.9% | 45.1% | 70.9% | 60.7% |
| Boating | 25.5% | 17.0% | 18.2% | 13.7% | 20.9% | 24.8% | 24.8% |
| Camping/RVing | 23.9% | 11.5% | 15.4% | 13.7% | 19.0% | 12.8% | 10.1% |
| Conservation | 29.1% | 12.0% | 17.6% | 20.1% | 15.0% | 9.5% | 18.2% |
| Outdoor adventure | 59.4% | 40.8% | 60.4% | 50.0% | 48.6% | 47.5% | 36.1% |
| State-specific content | 23.7% | 11.4% | 9.5% | 16.4% | 0.0% | 10.6% | 6.9% |
| None of the above | 0.4% | 1.4% | 1.9% | 1.8% | 1.8% | 2.0% | 5.9% |
| Total | N=509 | N=92 | N=54 | N=103 | N=34 | N=285 | N=87 |

TABLE 41. WHAT TYPE OF FISHING RELATED MAGAZINES DO YOU TYPICALLY READ IN PRINT FORMAT?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| General fishing | 60.4% | 43.3% | 60.7% | 50.1% | 41.3% | 51.8% | 50.8% |
| Fishing – species specific (i.e. Lindner's Fishing Edge, Major League Fishing, etc.) | 69.6% | 60.5% | 49.2% | 45.3% | 33.6% | 60.1% | 58.1% |
| Boating | 23.4% | 10.4% | 22.0% | 8.8% | 25.9% | 17.5% | 20.1% |
| Camping/RVing | 19.7% | 13.8% | 10.6% | 10.0% | 10.4% | 13.4% | 10.5% |
| Conservation | 29.0% | 11.7% | 9.9% | 20.8% | 13.9% | 13.9% | 14.6% |
| Outdoor adventure | 48.1% | 20.7% | 38.5% | 29.1% | 29.7% | 32.4% | 32.8% |
| State-specific content | 33.3% | 22.6% | 15.1% | 22.8% | 12.5% | 20.2% | 15.1% |
| None of the above | 3.5% | 5.3% | 1.9% | 2.3% | 16.0% | 1.8% | 7.5% |
| Total | N=482 | N=88 | N=46 | N=88 | N=23 | N=260 | N=80 |

TABLE 42. HOW DO YOU ENGAGE WITH FISHING CONTENT ON SOCIAL MEDIA?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--------------------------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Facebook | 87.9% | 69.9% | 71.4% | 66.9% | 68.4% | 78.2% | 72.5% |
| Instagram | 52.3% | 42.4% | 40.7% | 42.4% | 38.1% | 40.4% | 38.5% |
| Snapchat | 13.7% | 8.9% | 7.6% | 4.4% | 21.4% | 9.1% | 10.3% |
| Twitter | 17.1% | 13.4% | 19.0% | 4.0% | 22.4% | 18.8% | 14.9% |
| Pinterest | 14.1% | 3.3% | 10.7% | 10.5% | 6.5% | 6.2% | 8.2% |
| YouTube | 73.1% | 65.2% | 57.1% | 56.6% | 63.7% | 70.0% | 54.7% |
| Reddit | 9.5% | 1.5% | 6.9% | 15.9% | 16.1% | 2.0% | 3.8% |
| Other forums. Please describe. | 3.8% | 5.1% | 2.7% | 2.7% | 2.6% | 2.0% | 6.0% |
| Total | N=426 | N=77 | N=45 | N=69 | N=28 | N=230 | N=58 |

TABLE 43. WHICH OF THE FOLLOWING TYPES OF PROFILES DO YOU TYPICALLY FOLLOW OR SUBSCRIBE TO ON SOCIAL MEDIA?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|---|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Professional anglers | 61.5% | 50.2% | 32.8% | 26.2% | 45.6% | 51.9% | 36.4% |
| Amateur anglers | 45.3% | 34.0% | 25.5% | 20.2% | 21.3% | 37.1% | 28.6% |
| Manufacturers of fishing equipment | 69.8% | 53.9% | 40.5% | 29.9% | 40.7% | 61.0% | 37.5% |
| Parks & wildlife, or other fishing related state agencies | 61.4% | 28.4% | 47.8% | 53.8% | 42.3% | 45.8% | 31.1% |
| Local fishing groups | 66.2% | 41.9% | 30.5% | 34.9% | 43.0% | 45.6% | 47.7% |
| Angler-Oriented Groups (e.g. Trout Unlimited, B.A.S.S.) | 55.0% | 43.9% | 28.9% | 16.2% | 22.5% | 43.2% | 31.4% |
| Tackle shops | 61.2% | 38.3% | 25.9% | 31.4% | 40.2% | 47.6% | 32.3% |
| Specific media company profiles (TV shows, magazines.) | 50.6% | 40.2% | 31.3% | 32.1% | 29.2% | 37.2% | 23.3% |
| Outdoor media writers | 31.9% | 20.7% | 28.2% | 21.3% | 24.5% | 18.5% | 21.2% |
| Other. Please describe. | 1.0% | 0.0% | 3.7% | 0.0% | 0.0% | 1.4% | 1.3% |
| None of the above | 1.1% | 1.8% | 9.3% | 12.1% | 9.5% | 3.2% | 7.0% |
| Total | N=428 | N=78 | N=45 | N=69 | N=28 | N=230 | N=58 |

TABLE 44. WHICH OF THE FOLLOWING SOURCES DO YOU FIND INFLUENTIAL WHEN RESEARCHING FISHING INFORMATION?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|---|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Travel & tourism agencies | 13.8% | 7.0% | 15.7% | 12.0% | 15.7% | 9.5% | 6.1% |
| State game & park agency / commission | 49.6% | 19.0% | 40.2% | 46.2% | 27.6% | 38.3% | 19.5% |
| Online forums / blogs | 34.7% | 35.3% | 20.4% | 25.8% | 30.1% | 24.7% | 25.3% |
| Local clubs / organizations | 34.6% | 23.5% | 28.8% | 19.2% | 14.4% | 27.6% | 18.5% |
| Outdoor retailers | 40.8% | 20.0% | 18.6% | 26.0% | 21.0% | 36.6% | 22.4% |
| An endorsement by a general celebrity | 7.7% | 7.3% | 6.7% | 1.0% | 4.7% | 5.1% | 6.9% |
| Outfitters or guides | 34.3% | 14.3% | 17.4% | 17.7% | 30.2% | 20.1% | 15.3% |
| An endorsement by a hunting/fishing/outdoor celebrity | 24.2% | 16.9% | 12.0% | 8.0% | 10.2% | 17.2% | 9.5% |
| Non-profit organizations (e.g. Trout Unlimited, Coastal Conservation Association, etc.) | 21.5% | 8.5% | 17.7% | 14.4% | 12.4% | 12.5% | 16.3% |
| A friend / family member | 69.7% | 42.0% | 56.2% | 60.9% | 64.3% | 65.8% | 48.5% |
| TakeMeFishing.org | 12.4% | 4.0% | 16.3% | 4.3% | 13.1% | 7.8% | 7.1% |
| Fishing apps (FishBrain, FishAngler, etc.) | 23.2% | 20.8% | 16.6% | 13.2% | 15.6% | 23.8% | 22.7% |
| Other. Please describe. | 3.5% | 0.6% | 2.2% | 1.6% | 0.9% | 1.7% | 0.7% |
| Total | N=668 | N=148 | N=93 | N=179 | N=63 | N=401 | N=140 |

Demographics

While motivations to participate in fishing define each persona, differences in the demographic composition of each persona can further characterize a persona.

TABLE 45. GENDER.

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Male | 59.9% | 54.2% | 44.4% | 54.0% | 46.4% | 59.3% | 57.3% |
| Female | 40.1% | 45.8% | 55.6% | 46.0% | 53.6% | 40.7% | 42.7% |
| Total | N=3362 | N=1355 | N=1119 | N=1297 | N=966 | N=2643 | N=1585 |

FIGURE 10. GENDER BY PERSONA.

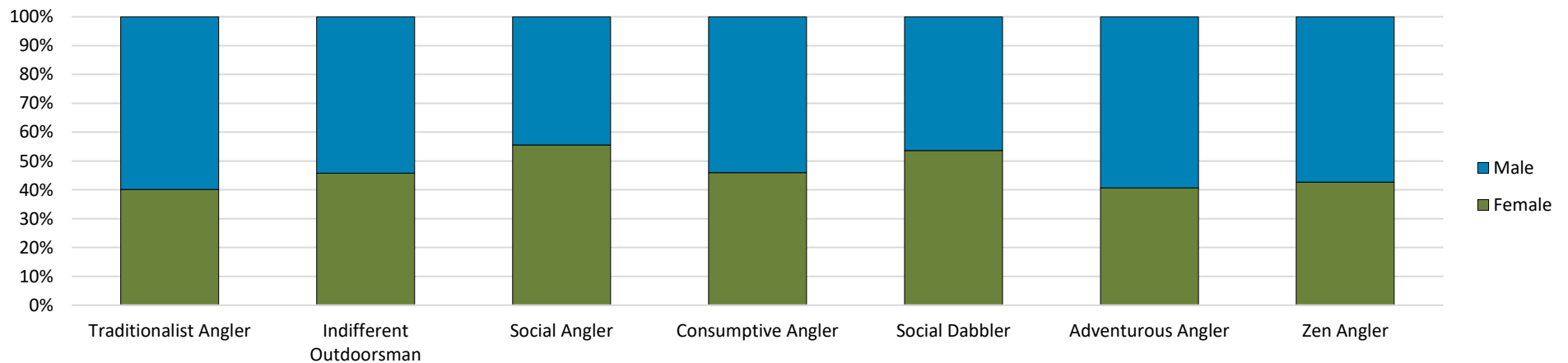


TABLE 46. GEOGRAPHIC REGION.

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|-----------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Northeast | 12.4% | 16.1% | 20.0% | 10.8% | 16.2% | 18.5% | 14.9% |
| Midwest | 22.9% | 19.0% | 20.5% | 23.9% | 24.2% | 21.1% | 22.6% |
| South | 43.6% | 39.5% | 34.4% | 39.8% | 39.8% | 39.7% | 37.3% |
| West | 21.1% | 25.4% | 25.1% | 25.4% | 19.8% | 20.8% | 25.2% |
| Total | N=3266 | N=1335 | N=1109 | N=1281 | N=955 | N=2594 | N=1556 |

TABLE 47. AGE CATEGORY.

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Under 20 | 2.5% | 8.0% | 4.5% | 3.8% | 9.2% | 6.9% | 5.8% |
| 20 to 29 | 20.5% | 25.9% | 25.7% | 25.7% | 30.1% | 23.7% | 23.9% |
| 30 to 39 | 24.8% | 21.6% | 26.7% | 22.3% | 22.8% | 23.2% | 19.4% |
| 40 to 49 | 18.1% | 14.0% | 13.6% | 13.1% | 12.3% | 13.1% | 14.7% |
| 50 to 59 | 17.9% | 13.0% | 12.4% | 15.1% | 11.3% | 16.1% | 15.6% |
| 60 to 69 | 11.9% | 11.6% | 12.2% | 14.0% | 9.4% | 12.5% | 14.2% |
| 70 to 79 | 4.2% | 5.3% | 4.3% | 5.2% | 4.1% | 4.1% | 5.9% |
| 80 and older | 0.2% | 0.6% | 0.5% | 0.7% | 0.8% | 0.3% | 0.4% |
| Total | N=3362 | N=1355 | N=1119 | N=1297 | N=966 | N=2643 | N=1585 |

TABLE 48. HIGHEST LEVEL OF EDUCATION.

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|--|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| 11 years or less | 1.7% | 4.7% | 2.0% | 2.6% | 2.4% | 3.0% | 2.5% |
| High school diploma or G E D | 21.1% | 24.6% | 16.4% | 25.1% | 21.0% | 23.1% | 26.0% |
| Some college, Associates degree, or technical degree | 43.7% | 36.3% | 40.1% | 39.5% | 37.0% | 38.7% | 38.2% |
| Bachelor's degree | 25.6% | 24.6% | 29.9% | 22.9% | 24.8% | 25.6% | 24.6% |
| Advanced degree | 7.9% | 9.9% | 11.7% | 10.0% | 14.8% | 9.6% | 8.7% |
| Total | N=3362 | N=1355 | N=1119 | N=1297 | N=966 | N=2643 | N=1585 |

TABLE 49. HOUSEHOLD INCOME.

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|------------------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Under \$20,000 | 7.7% | 13.1% | 10.7% | 13.3% | 10.0% | 9.4% | 12.0% |
| \$20,000 to \$29,999 | 8.3% | 10.8% | 10.0% | 10.3% | 10.2% | 9.7% | 12.7% |
| \$30,000 to \$39,999 | 7.2% | 9.0% | 11.1% | 11.2% | 9.0% | 10.1% | 10.6% |
| \$40,000 to \$49,999 | 10.0% | 10.7% | 6.8% | 10.7% | 10.2% | 8.5% | 8.8% |
| \$50,000 to \$74,999 | 19.3% | 19.0% | 21.6% | 19.1% | 20.9% | 18.5% | 19.6% |
| \$75,000 to \$99,999 | 15.3% | 11.4% | 13.2% | 12.6% | 13.2% | 14.5% | 12.3% |
| \$100,000 to \$149,999 | 15.3% | 12.3% | 14.6% | 10.7% | 11.4% | 13.9% | 12.0% |
| \$150,000 to \$199,999 | 5.8% | 3.4% | 3.9% | 3.7% | 5.3% | 4.7% | 3.3% |
| \$200,000 or more | 3.5% | 3.1% | 3.1% | 2.7% | 2.9% | 2.6% | 1.7% |
| I prefer not to say | 7.6% | 7.2% | 5.0% | 5.8% | 6.9% | 8.1% | 7.0% |
| Total | N=3362 | N=1355 | N=1119 | N=1297 | N=966 | N=2643 | N=1585 |

Appendix 1: Max-Diff Results

A max-diff experiment was run to understand how anglers valued various characteristics of a given fishing experience. The dimensions of the experiment are described below:

Question text: Which of the following characteristics make up a good fishing experience, as you define it? Please identify the most important and least important characteristic of time spent fishing.

Levels:

- Catching lots of fish
- Caught only large fish
- Catching a trophy fish
- Enjoying the outdoors
- Having a relaxing time
- Spending time with friends/family
- Catching the species, I am targeting
- Improving my fishing technique

Experiment design: A set of 4 items were displayed to respondents, with respondents selecting the “most important” and “least important” characteristic of a fishing trip. Each respondent was presented with 5 sets.

Hierarchical Bayes Analysis: using Lighthouse Studio’s Sawtooth Software, a H-B analysis was conducted on the best-worst outcomes of the max-diff experiment. The probability scaled results are presented in the table below, and for each level in the following figures with 95% confidence intervals noted with whisker plots.

TABLE 50. WHICH OF THE FOLLOWING CHARACTERISTICS MAKE A GOOD FISHING EXPERIENCE, AS YOU DEFINE IT?

| | Traditionalist | Occasional Angler | Friendly Fisher | Consumptive Angler | Social Dabbler | Adventurous Angler | Zen Angler |
|---------------------------------------|----------------|-------------------|-----------------|--------------------|----------------|--------------------|------------|
| Catching lots of fish | 8.80 | 8.55 | 5.85 | 7.58 | 6.77 | 9.15 | 6.17 |
| Catching only large fish | 2.53 | 4.55 | 1.59 | 1.78 | 2.58 | 3.51 | 1.76 |
| Catching a trophy fish | 3.42 | 5.03 | 1.92 | 1.87 | 2.58 | 4.74 | 2.08 |
| Enjoying the outdoors | 22.33 | 20.81 | 25.68 | 24.78 | 24.19 | 21.39 | 25.19 |
| Having a relaxing time | 19.77 | 17.97 | 25.07 | 22.88 | 22.12 | 18.93 | 24.09 |
| Spending time with friends and family | 24.15 | 21.39 | 26.66 | 25.87 | 26.63 | 21.62 | 25.11 |
| Catching the species, I am targeting | 8.99 | 10.27 | 5.41 | 7.09 | 6.16 | 9.48 | 6.37 |
| Improving my fishing technique | 10.00 | 11.44 | 7.83 | 8.14 | 8.98 | 11.19 | 9.24 |

For those personas, whose whisker plots overlap, it cannot be stated that their preference for a given characteristic of a fishing experience are statistically significantly different from one-another at the 95% confidence level. For example, the Social Dabbler and Adventurous Angler personas do not have statistically significantly different preferences regarding catching lots of fish (Figure 12).

FIGURE 11. CATCHING LOTS OF FISH: PROBABILITY SCALED RESULTS BY PERSONA.

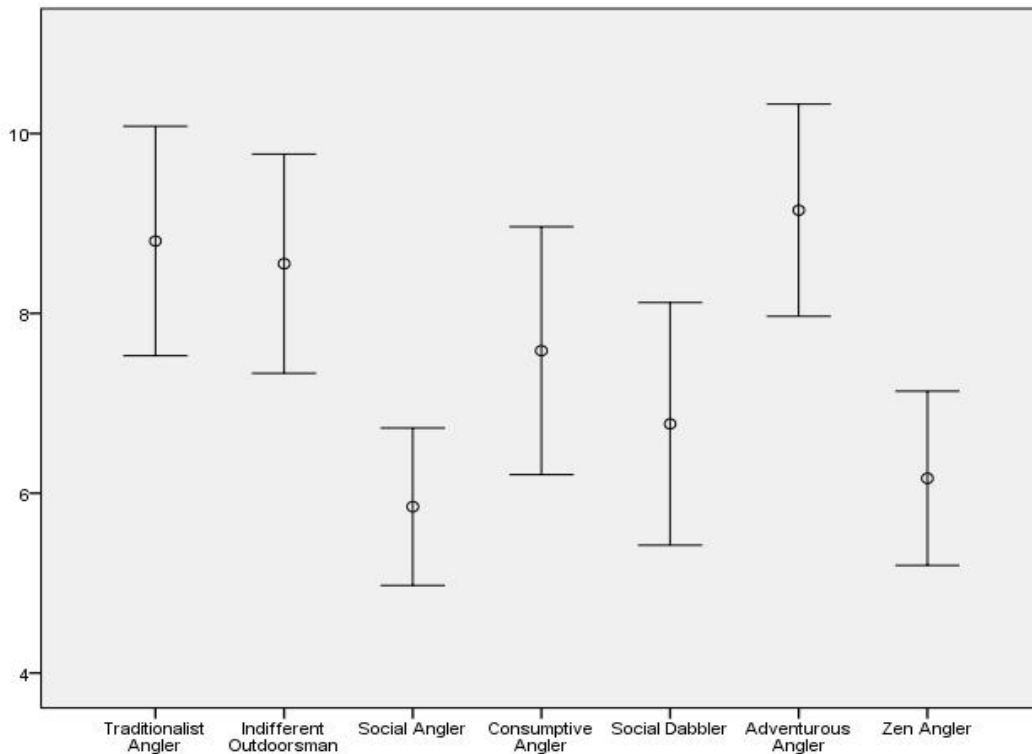


FIGURE 12. CATCHING ONLY LARGE FISH: PROBABILITY SCALED RESULTS BY PERSONA.

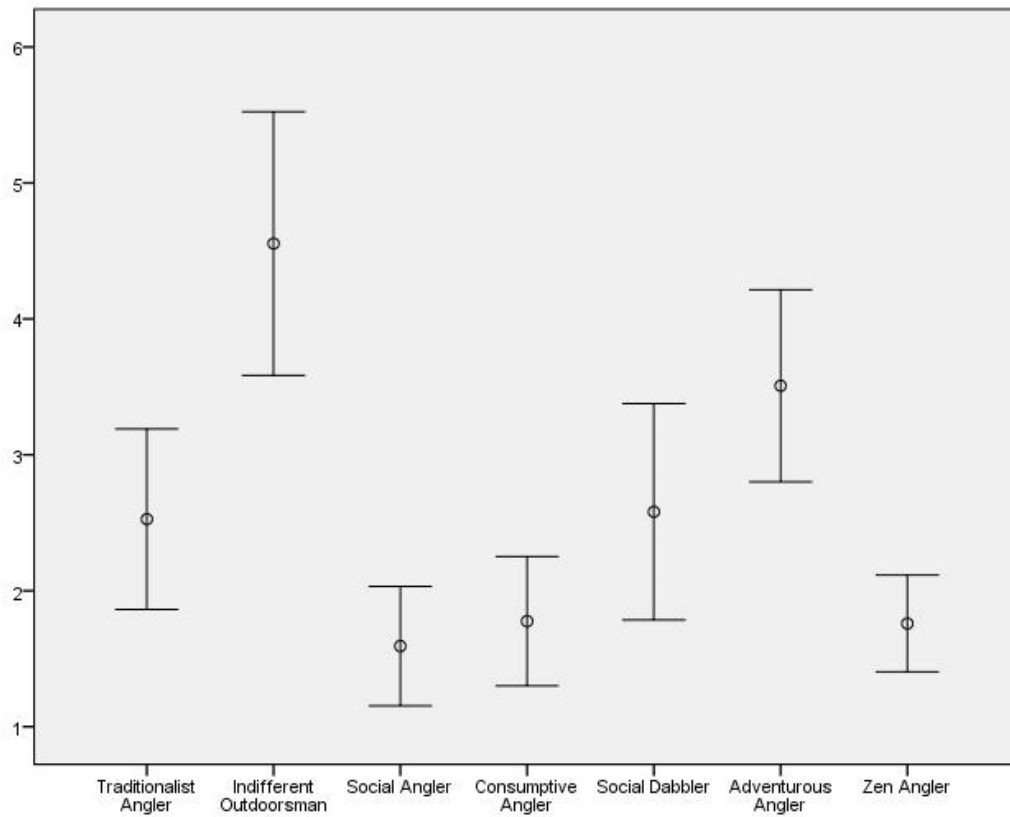


FIGURE 13. CATCHING A TROPHY FISH: PROBABILITY SCALED RESULTS BY PERSONA.

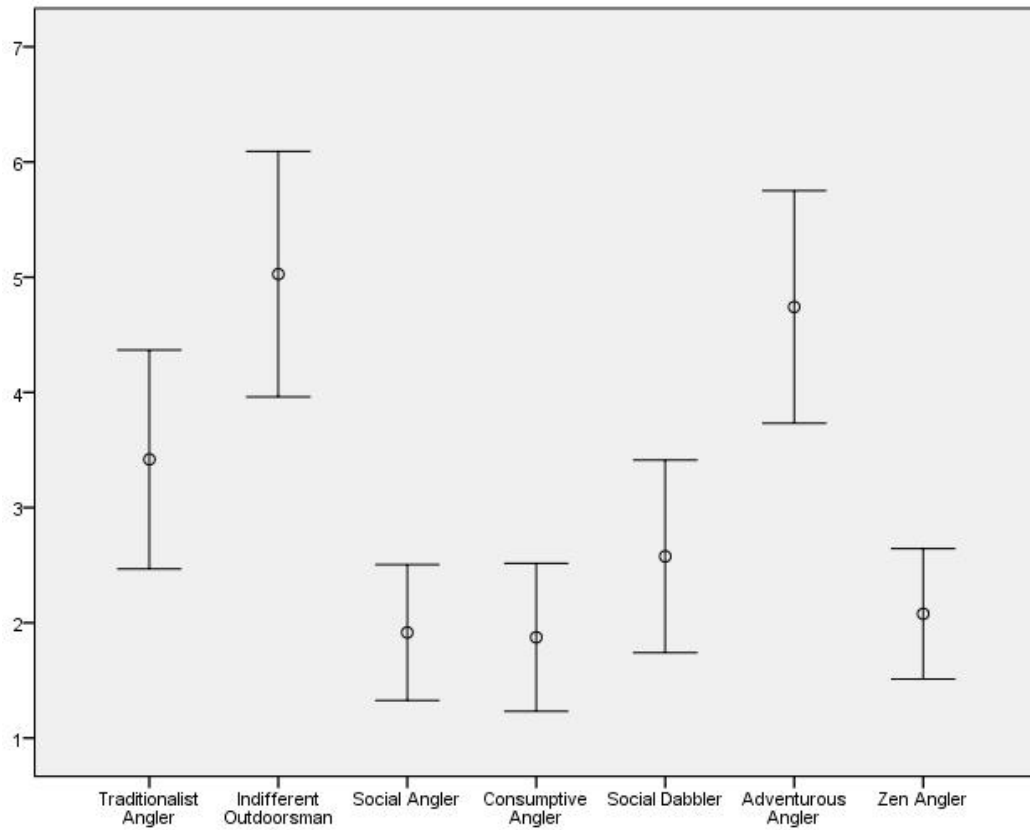


FIGURE 14. ENJOYING THE OUTDOORS: PROBABILITY SCALED RESULTS BY PERSONA.

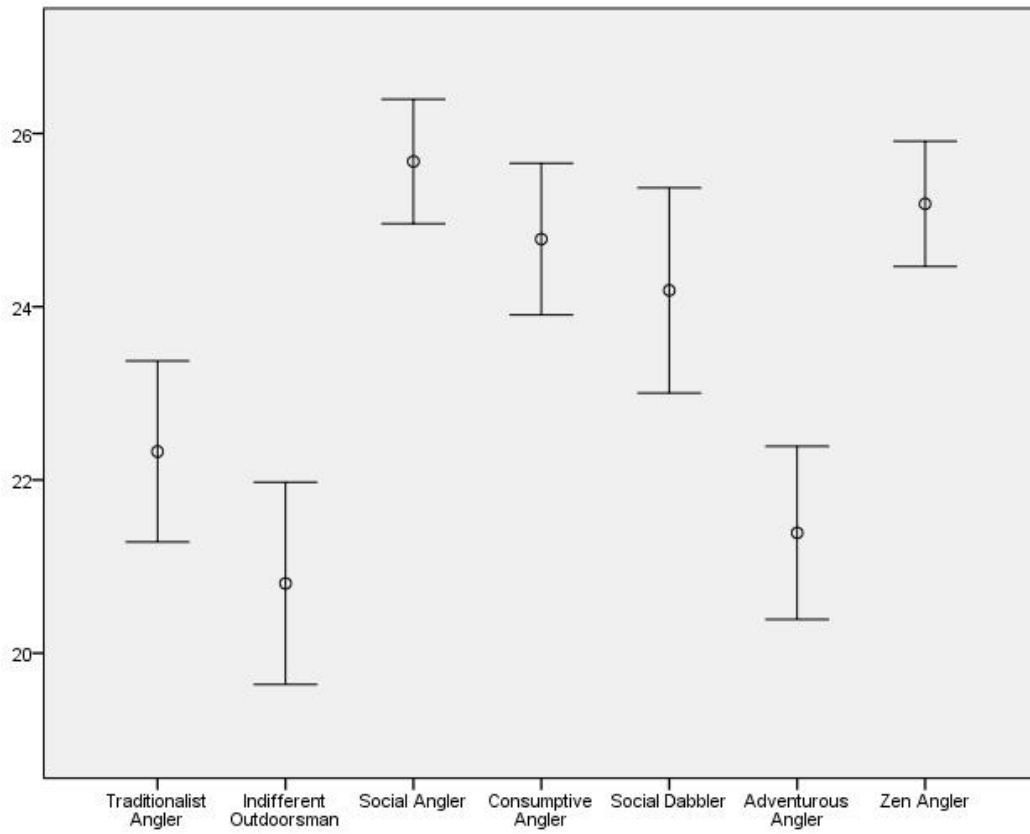


FIGURE 15. HAVING A RELAXING TIME: PROBABILITY SCALED RESULTS BY PERSONA.

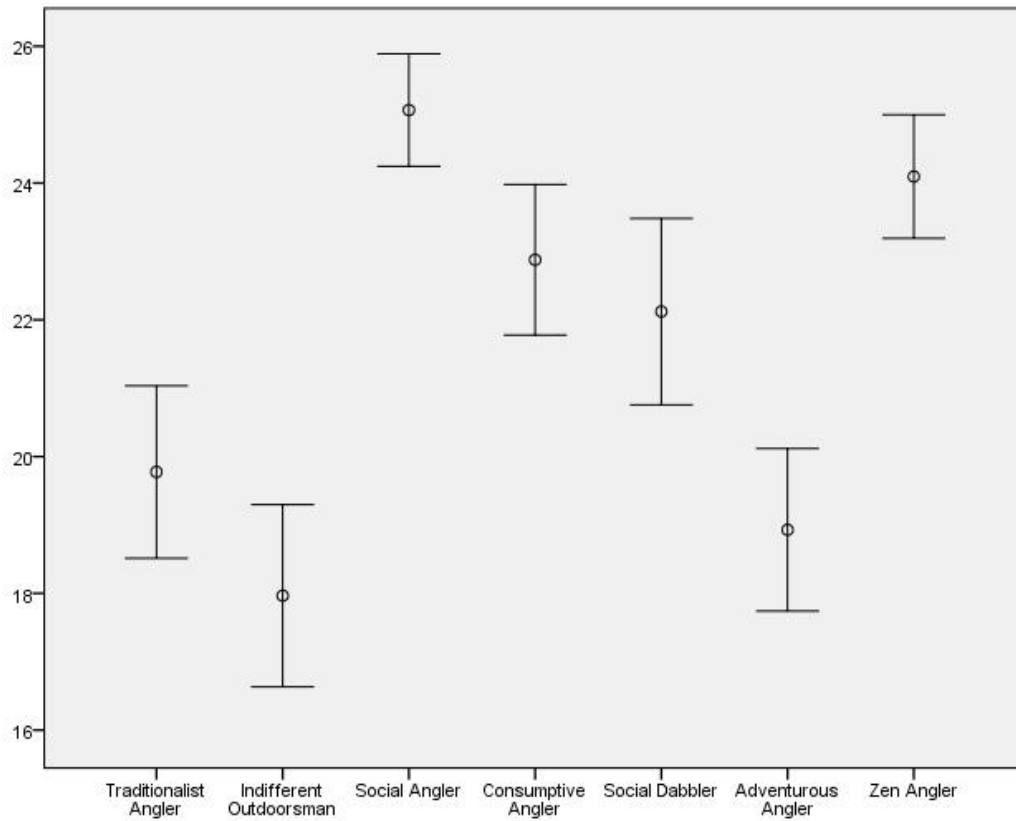


FIGURE 16. SPENDING TIME WITH FRIENDS AND FAMILY: PROBABILITY SCALED RESULTS BY PERSONA.

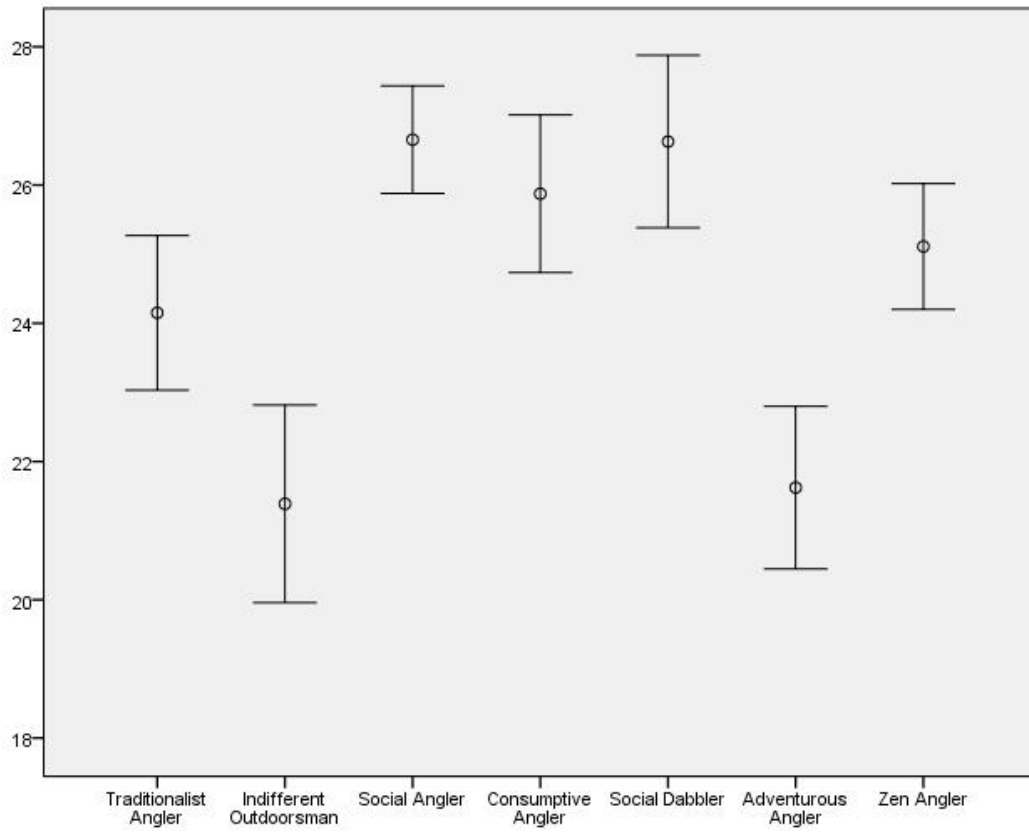


FIGURE 17. CATCHING THE SPECIES, I AM TARGETING: PROBABILITY SCALED RESULTS BY PERSONA.

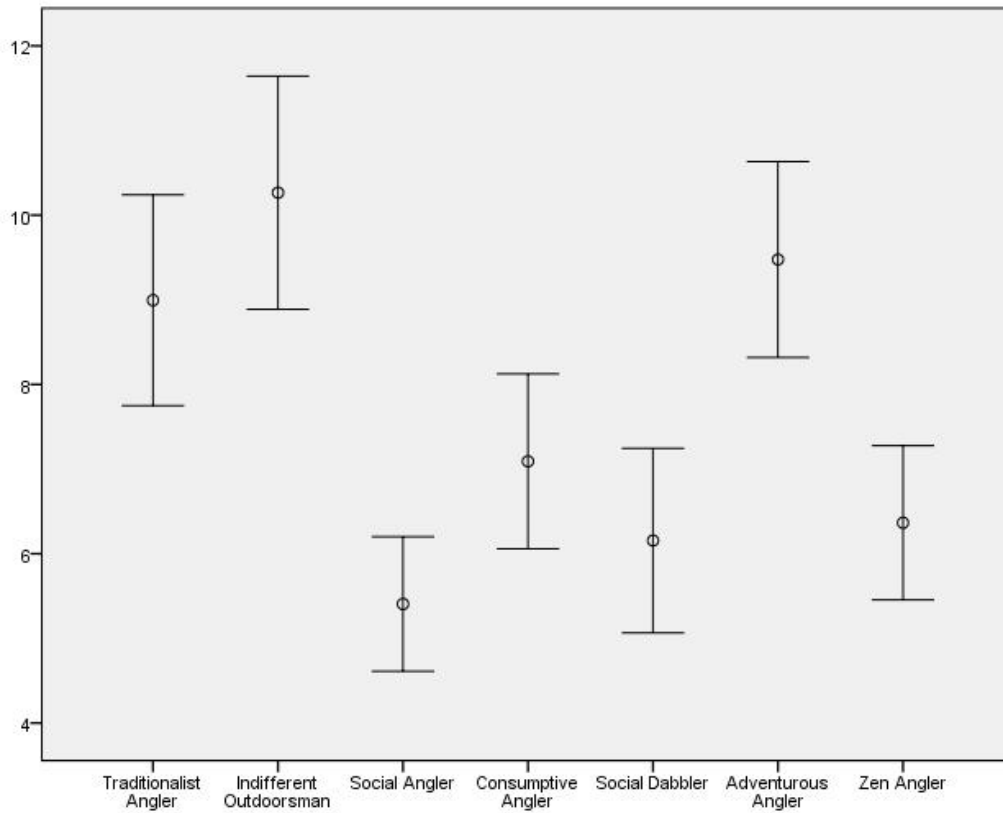


FIGURE 18. IMPROVING MY FISHING TECHNIQUE: PROBABILITY SCALED RESULTS BY PERSONA.

