

ANGLER PERSONAS

— UNDERSTANDING ANGLERS' MOTIVATIONS —





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INTRODUCTION

— Background & Objectives —

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

This study identified seven unique personas that comprise U.S. anglers. 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, both state agency professionals and the private sector will be better equipped to maintain participation and sales.

— Research Design —

The segmentation study was conducted in two phases:

Phase 1 - Personas Defined: A general population survey of more than 3,000 U.S. adults was conducted. Anglers were defined as people who fished within the past three years or planned to fish within the next year. Detailed responses from these anglers formed the basis for identifying the seven consumer segments that comprise the U.S. angler population.

Phase 2 - In-Depth Exploration: Follow-up surveys were conducted to provide depth to each persona by describing desired fishing experiences, retention topics, media behavior, typical purchases and more. Surveys were distributed to active anglers by sportfishing media and businesses while less frequent anglers were reached using a general population survey panel. In total, 9,300 surveys were completed in Phase 2.

Each phase underwent rigorous evaluation and analysis to statistically identify how consumers naturally group together based on common motivations and characteristics. Profiles were also built for each persona describing:

- Why They Fish
- Introduction to Fishing
- Level of Fishing Experience
- Avidity and Engagement in Angling
- Fishing-Related Activities
- Important Characteristics of Site Selection
- Fishing Equipment Ownership & Purchase Intentions
- Shopping Habits
- Media Consumption
- Other Outdoor Recreational Interest
- Angler Demographics
- And more.

For additional details and the technical report go to www.ASAfishing.org.

— What Else Can We Learn? —

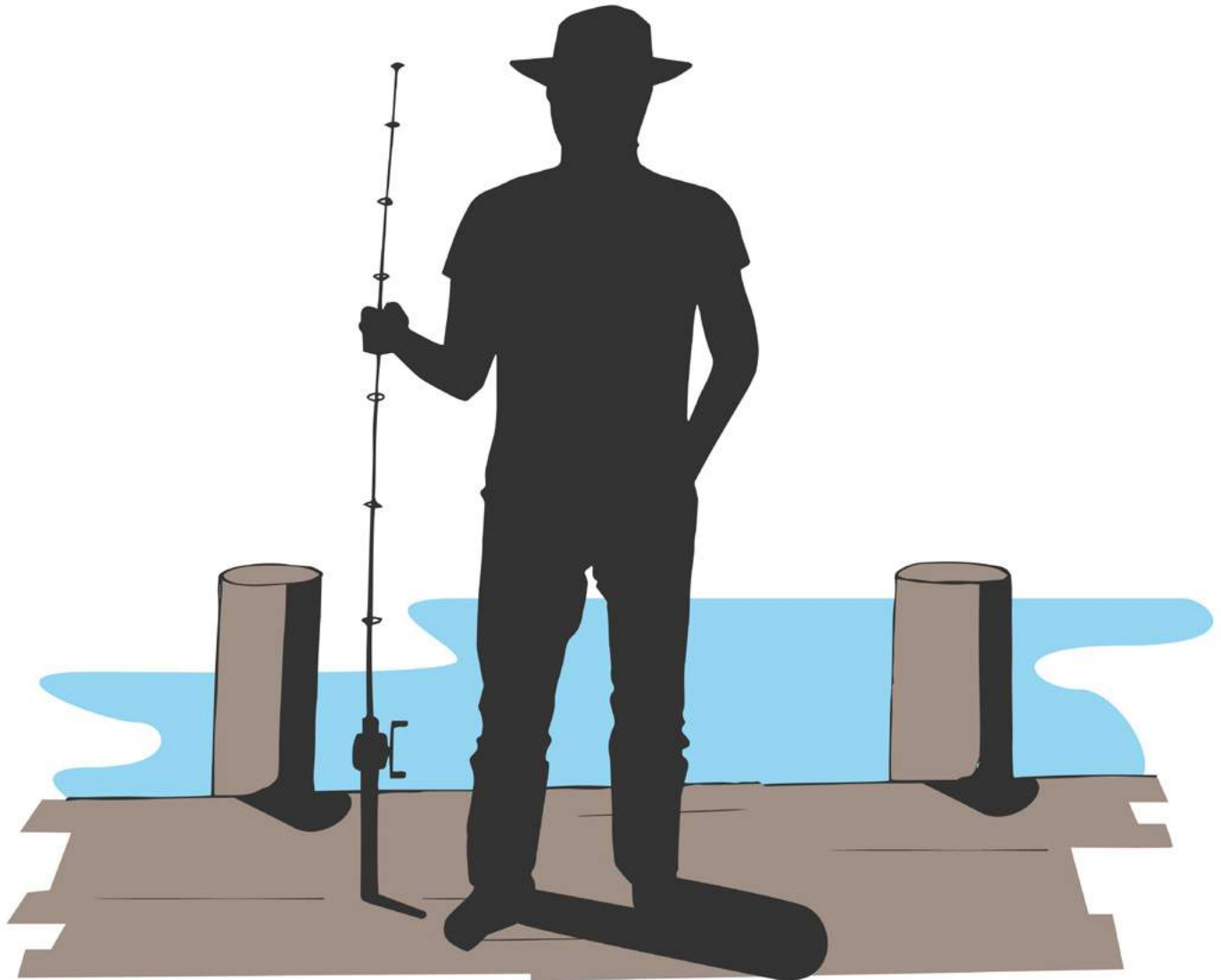
The personas covered in this report represent ALL anglers in the U.S. However, outreach or marketing efforts rarely target all anglers at once. Outreach and marketing efforts generate greater returns when targeting more narrowly defined target audiences who share common interests, motivations and communication preferences.

Companies, state fisheries agencies and other organizations have two general goals available when targeting anglers: 1) focus on their current niches, and 2) expand to new audiences or customers. The first approach seeks to develop greater loyalty and gain greater market share by better connecting with a specific type of angler. The second looks for new niches where customer awareness, participation and/or purchases of specific products or brands are low and growth potential exists. Businesses and angler outreach efforts would first profile their current customers and audiences using the profiles and resources from this study. If the goal is to strengthen your position within your current market, this report's persona profiles can be used to help improve your messaging, imagery and even develop new products to achieve greater growth. If the goal is to expand to new audiences and markets, by comparing your current customer personas to the general market's personas described in this report, you can determine the types of anglers or markets that are under-represented in your efforts. These under-represented audiences constitute your growth opportunities. The persona profiles provided in this report will then help you devise a marketing and communications approach that maximizes effectiveness.

The 'typing questions', which is the set of questions used to identify each unique persona, are available for use. Your current audience can be surveyed using these questions to help you profile your current base. Contact Nancy@SouthwickAssociates.com for the typing questions. Assistance is available. We encourage adding additional questions unique to your mission or product niche, such as identifying barriers to participation or identifying lure preferences, to further help breakdown your audience. By better understanding targeted audiences and how to retain them as customers or how to boost sales, greater returns on marketing dollars will be achieved.

AVERAGE ANGLER

— 17% of U.S. Population* —



— Key Takeaways —

There are many different types of anglers. As described later, U.S. anglers can be divided into seven major personas, 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.

*This number is sourced from the [2020 Special Report on Fishing](#) from the Recreational Boating & Fishing Foundation and The Outdoor Foundation

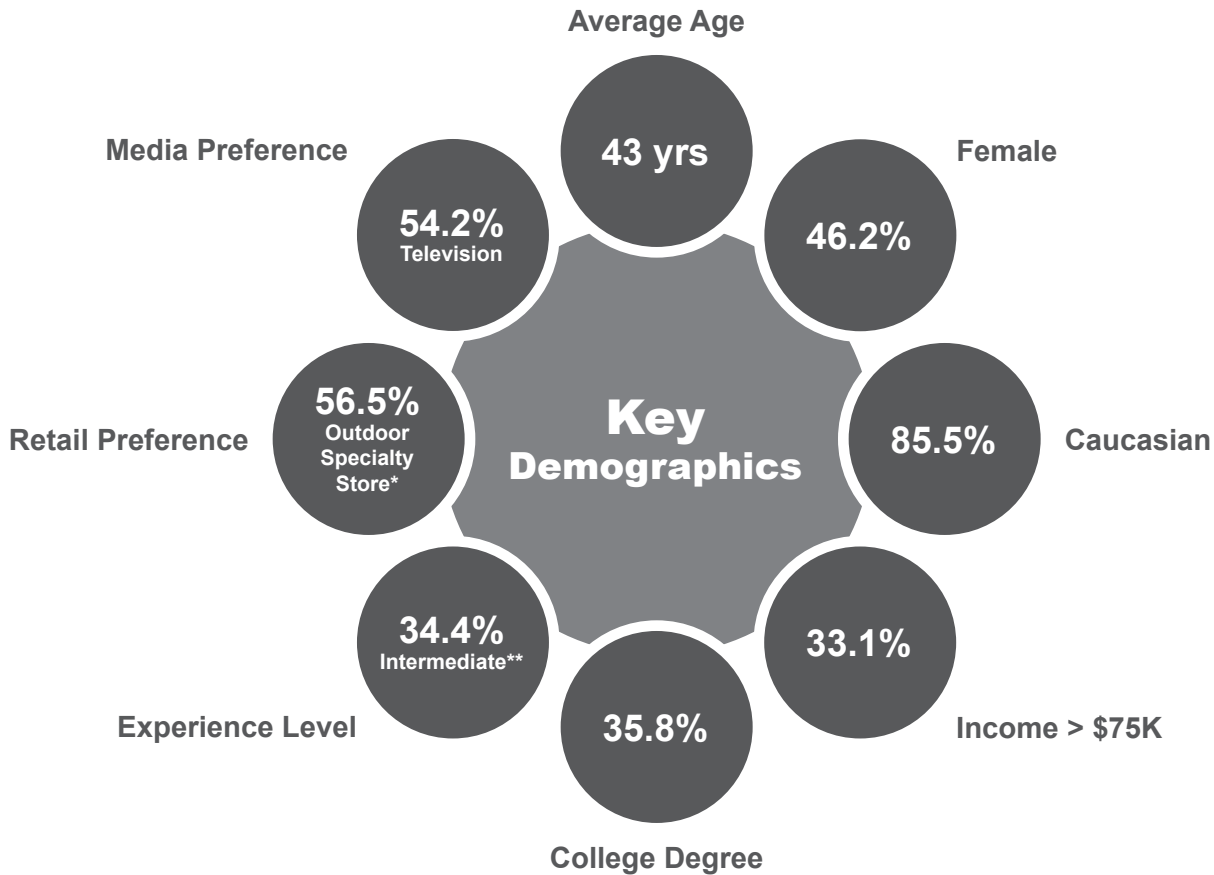
— American Sportfishing Association —

— Topline —

This first section profiles the average angler. However, never market towards the ‘average angler’ simply because this person does not exist. No one fishes for all the reasons and motivations captured in the seven personas that follow this section. Use this ‘average angler’ profile to better understand what makes each of the seven personas unique.

Top 3 Motivations

1. To get away and relax
2. To spend times outdoors
3. To connect with family or friends

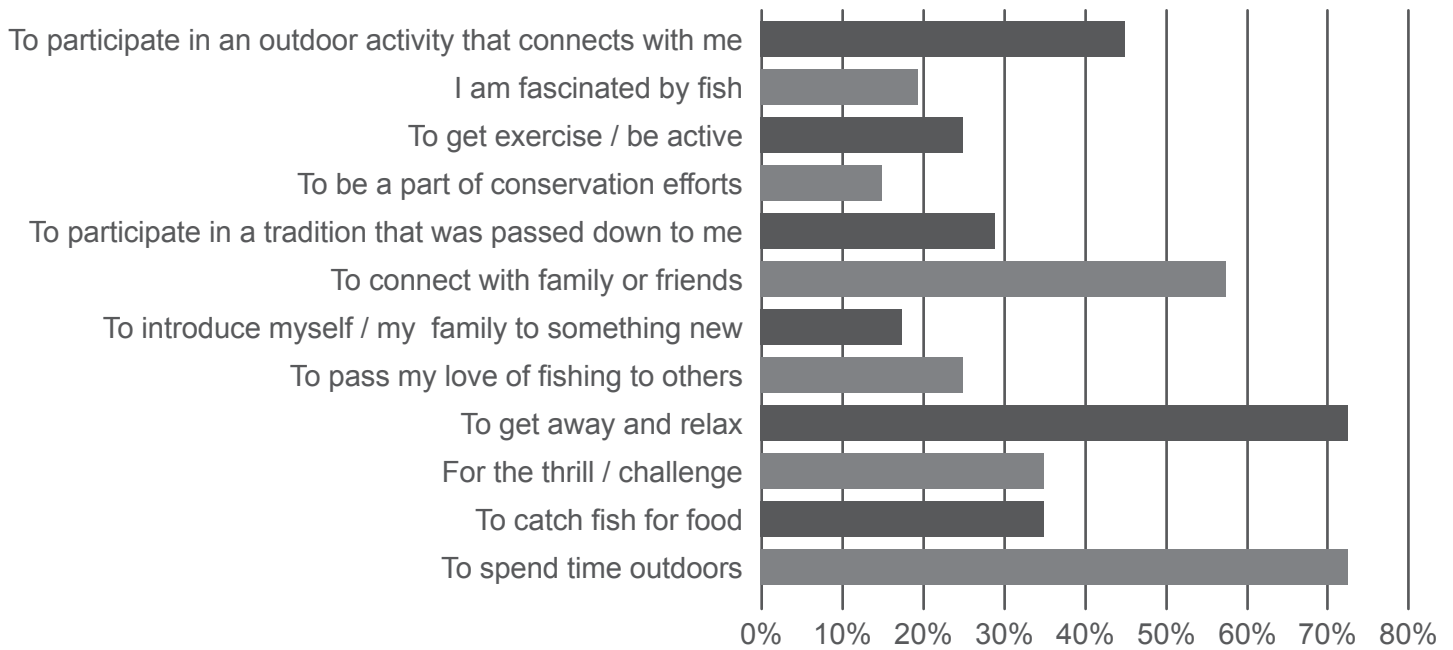


*Bass Pro, Cabela's, etc. **Comfortable w/ the rod, casting, & tackle selection in some settings

— Experience Level —

Beginner	Novice	Intermediate	Advanced	Expert
18.7%	24.8%	34.4%	17.0%	5.0%
Very limited experience holding a rod and casting	Some experience with rod and casting techniques and beginning to experiment with different types of tackle	Comfortable with the rod, casting, and tackle selection in some settings	Lots of experience with equipment and techniques in many settings	Very experienced with equipment and techniques in all settings

— Motivations —



— R3 (Recruitment, Retention, Reactivation) —

Q: How old were you when you began fishing?

A: 10 years old

How did you first become interested in fishing?

I was introduced to fishing by an older family member	72.5%
I was introduced to fishing by a friend	14.2%
Television shows / movies	2.2%
Magazines or online publications	0.8%
Social media	1.4%
Clubs or organizations (i.e. Scouts, school club, summer camp)	2.0%
School (PE program, etc.)	0.6%
My child became interested and asked me about fishing	2.4%
Other	3.8%

Who did you first go fishing with?

A parent or grandparent	56.6%
A family member (other than parent or grandparent)	18.4%
A friend, or family friend	18.4%
A club or organization (i.e. Scouts, summer camp, church group)	1.3%
A coworker	0.7%
School or university	0.5%
My child	1.8%
Nobody / by myself	2.4%

Do you expect to go fishing in the next year?

Yes	83.1%
No	16.9%

Which of the following characteristics make a good fishing experience, as you define it?

Catching lots of fish	7.53
Catching only large fish	2.60
Catching a trophy fish	3.12
Enjoying the outdoors	23.48
Having a relaxing time	21.60
Spending time with friends and family	24.37
Catching the species, I am targeting	7.70
Improving my fishing technique	9.60

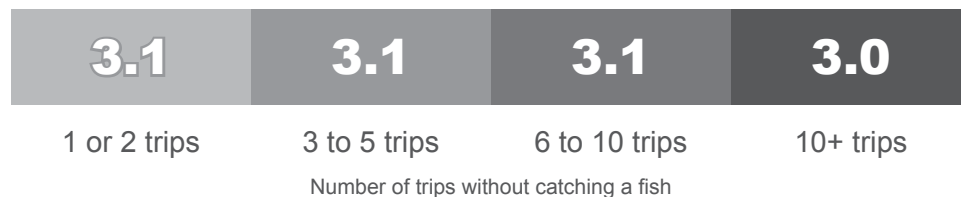
Values reflect a relative rank of each characteristic from most important (higher value) to least important (lower value)

Which factors do you consider most important when selecting a fishing site?

Shorter travel distance / close to home	20.3%
Abundance of fish	27.8%
New site / going somewhere different	10.0%
Water quality/conditions	22.4%
Diversity of fish species	10.0%
Opportunity to catch big fish	24.4%
The scenic beauty	23.2%
Regular fish stocking	5.8%
People on-site to help	3.5%
Education programs offered	0.9%
Lack of crowds	31.0%
Learning of positive fishing information (i.e. a tip about a hotspot from a friend, coworker)	8.5%
No access fees	15.8%
Other activities nearby (playground)	3.2%
Familiar site / I already have access or permission	21.1%
Easy to access	26.0%
Amenities (public bathrooms, picnic tables, parking lot, etc.)	10.2%
Safety	14.9%

Considering your next fishing outing, how would your plans be affected if you didn't catch any fish on your past trips?

The following figure 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.



What other activities or hobbies typically compete against fishing for your time?

My child's activities (sports, etc.)	19.6%
Other clubs, organizations, groups in which I participate (i.e. church groups, sports leagues)	16.2%
Other outdoor recreation activities	35.8%
Family obligations	58.7%
Work obligations	49.4%
School	9.5%
Relaxing at home (television, reading, etc.)	44.1%
Other. Please describe	8.0%

Which of the following reasons has prevented you from fishing at least once in the past year?

Did not have anybody to go with	24.1%
I was not sure where to go	10.1%
Did not have enough money	15.3%
I was not successful, so I did not go again	3.5%
Fishing regulations have gotten too restrictive	7.1%
Health issues	15.9%
Weather	39.6%
Did not have the right equipment	13.6%
Other. Please describe.	7.3%
None of the above – I have not been prevented from fishing at all in the last year	21.0%

Even if you are an avid angler, which of the following might encourage you to fish more often?

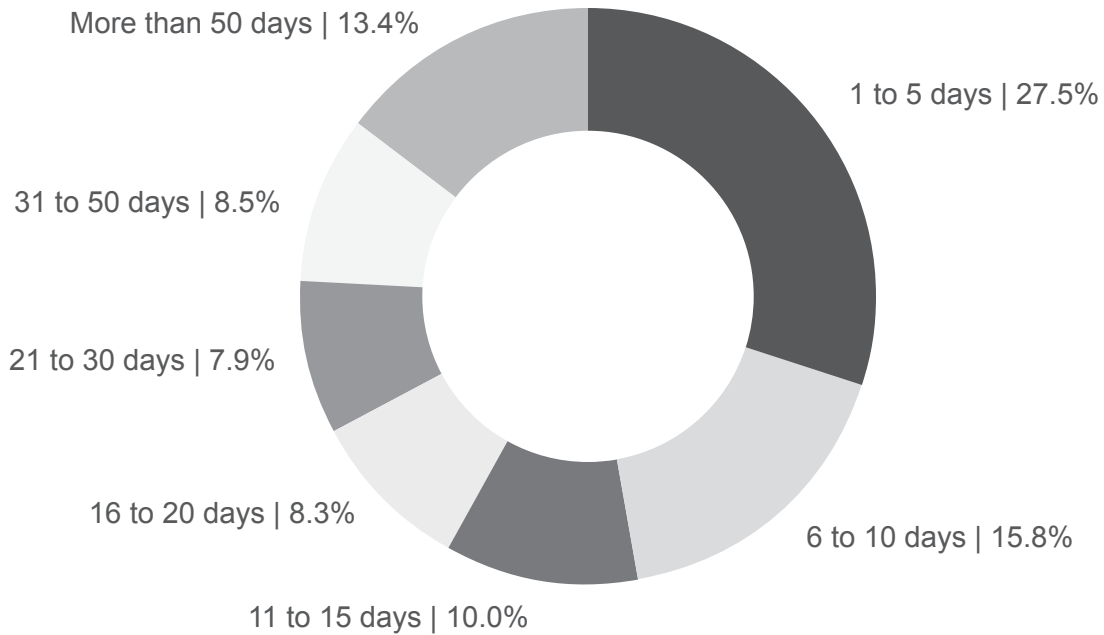
An invitation from a friend or family member to go fish	70.2%
Fishing instruction to improve my knowledge / methods / technique	27.7%
Access to rental or loaner fishing equipment	15.0%
Information and insights from local fishing experts	24.0%
A special beginner event for first-time anglers only	10.5%
Stories about fishing in local online media (blogs, social media, websites)	12.5%
Stories about fishing in local print media	10.0%
Other. Please describe.	4.7%
None of the above	11.8%

— Fishing Activity —

How recently have you been fishing?

Within the past year	54.2%
1 to 3 years ago	15.2%
4 or 5 years ago	8.2%
6 to 10 years ago	8.2%
11 to 20 years ago	7.8%
More than 20 years ago	6.4%

How many days did you fish in the past year?



Percentage of time for types of fishing expected within the next year, or during a typical year?

Freshwater	65.3%
Saltwater	26.8%
Brackish	7.9%

Percentage of time for types of fishing techniques in the next year, or in a typical year?

Fishing with live bait	42.5%
Fishing with artificial bait or lures	47.5%
Fly fishing	10.0%

Which freshwater species do you typically target?

Bass (largemouth, smallmouth, white, sunshine, hybrid, etc.)	71.9%
Carp	10.8%
Catfish	40.0%
Perch or Panfish (crappie, sunfish, bluegill/bream)	42.6%
Pickerel, pike, or muskie	12.1%
Salmon	13.9%
Saugeye	3.1%
Steelhead	5.4%
Sturgeon	2.4%
Trout	39.2%
Walleye	20.7%
Other freshwater species	11.5%

Which saltwater species do you typically target?

Amberjack	6.9%
Black Drum	10.9%
Bluefish	22.1%
Cod (all species)	23.6%
Flounder	39.6%
Grouper, snapper, sea bass	28.3%
Halibut	14.6%
Mackerel (king, Spanish, Boston, cero, etc.)	14.8%
Permit	3.3%
Redfish, red drum	26.8%
Rockfish (Pacific coast only)	8.4%
Scup	3.5%
Shark	9.9%
Snook	9.7%
Speckled Trout	10.3%
Spotted seatrout or weakfish	22.7%
Striped bass	31.6%
Tarpon	8.0%
Yellow tail	14.5%
Other saltwater species	16.1%

— Spending —

Have you purchased any fishing related items in the past year?

Yes	58.9%
No	41.1%

How much have you spent on fishing equipment within the past year?



Which of the following items have you purchased within the past year?

Reel	49.8%
Rod	54.0%
Combo (rod/reel)	32.1%
Fishing Line	78.7%
Lures and baits (hard, soft, spinner, dough, jig, live bait - not fly fishing)	84.6%
Fishing electronics (GPS, sonar, fish finders)	24.4%

Where do you typically purchase fishing equipment?

Farm/ranch store (Big R, Tractor Supply, etc.)	9.0%
Fishing shows or expos	13.5%
General sporting Goods (Dick's, Academy, etc.)	39.2%
Local bait & tackle shop	46.8%
Mass Merchant (Wal-Mart, Sam's Club)	33.4%
Outdoor Specialty Store (Bass Pro, Cabela's, etc.)	56.5%
Printed catalog (Cabela's, Bass Pro, etc.)	13.6%
Website	33.7%
Other	2.8%

— Media Habits —

Which types of media have you used for fishing related entertainment in the past year?

Television	54.2%
Websites (blogs, online magazines, etc.)	53.1%
Social media	47.4%
Magazines - print	44.4%
State fishing regulation guides	44.2%

What type of fishing related websites do you typically visit?

Online magazines (Field & Stream, Bass Angler, etc.)	57.5%
Forums/chat rooms	36.2%
Websites for manufacturers or retailers	64.1%
State fish & wildlife sites	66.7%
None of the above	3.3%
All of the above	12.0%

Which of the following sources do you find influential when researching fishing information?

Travel & tourism agencies	11.0%
State game & park agency / commission	36.2%
Online forums / blogs	28.0%
Local clubs / organizations	25.0%
Outdoor retailers	28.7%
An endorsement by a general celebrity	5.6%
Outfitters or guides	21.5%
An endorsement by a hunting/fishing/outdoor celebrity	14.9%
Non-profit organizations (i.e. Trout Unlimited, Coastal Conservation Association)	15.2%
A friend / family member	59.3%
TakeMeFishing.org	8.9%
Fishing apps (FishBrain, FishAngler, etc.)	20.2%
Other. Please describe.	1.8%

For details on their use and preference for print, social media and other insights, please refer to the detailed technical report available from www.ASAfishing.org or www.SouthwickAssociates.com.



ANGLER PERSONAS

Angler Motivations Overview

Personas	Primary Motivations (in priority order)		
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	-	-

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."

Occasional Angler

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

Friendly Fisher

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

Consumptive Angler

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

Social Dabbler

"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."

Adventurous Angler

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

Zen Angler

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

TRADITIONALIST

— 11% of U.S. anglers —

“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.”



— 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 personas. 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.

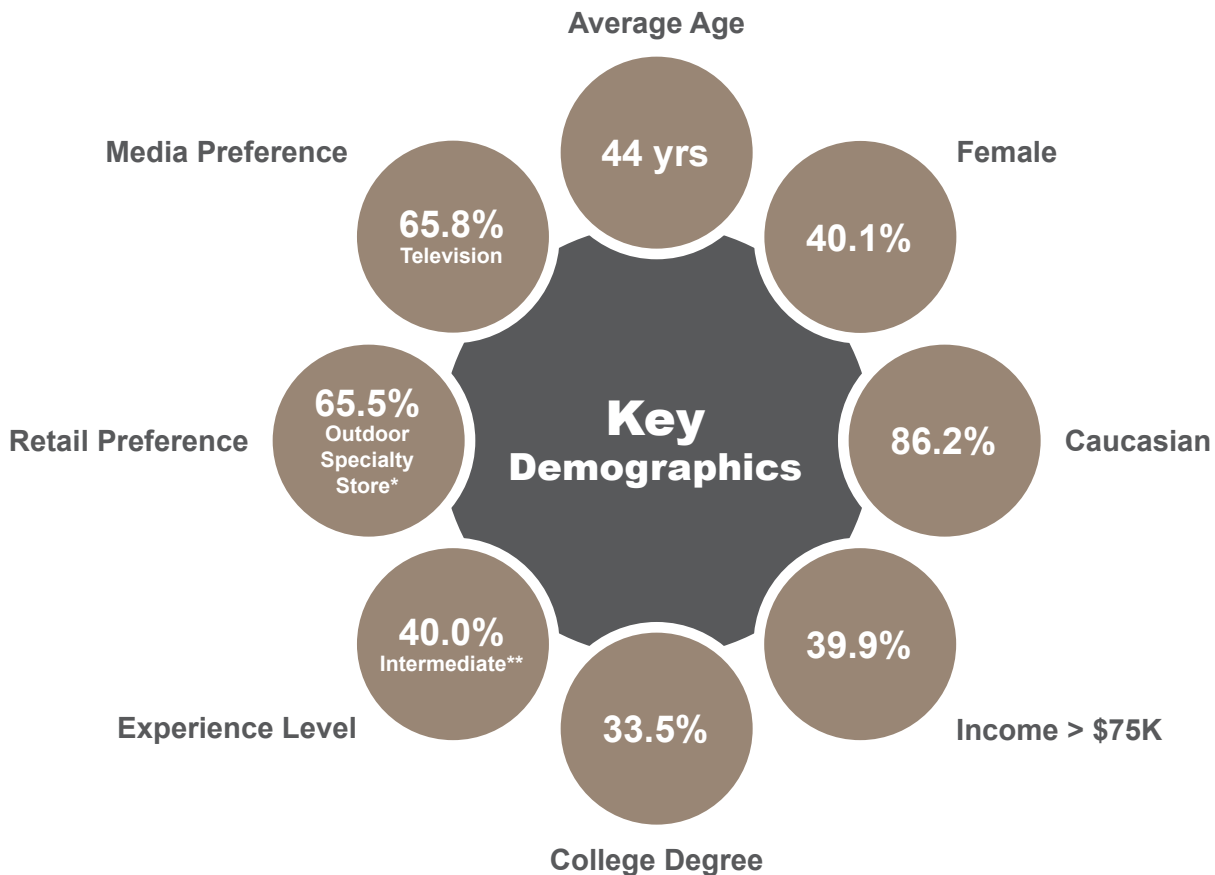
— American Sportfishing Association —

— Topline —

The Traditionalist persona makes up 11.1% of the angler community and can be viewed as the stereotypical avid angler. This persona 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.

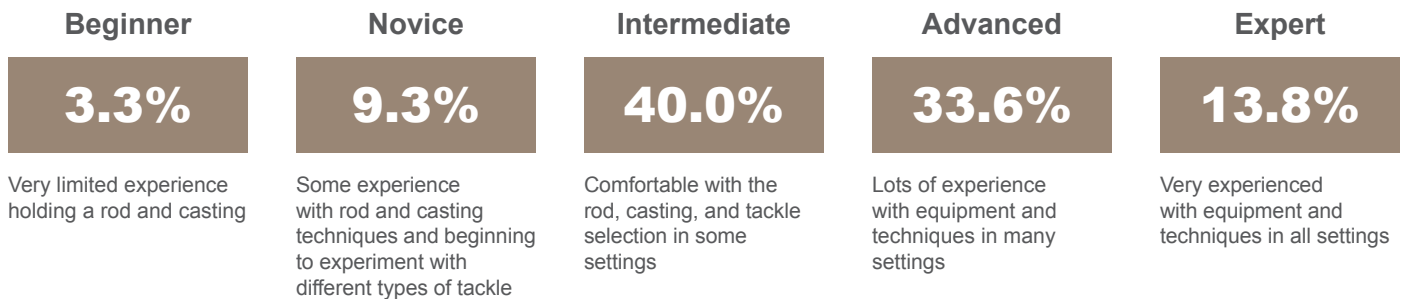
Top 3 Motivations

1. To pass on my love of fishing to others
2. To be a part of conservation efforts
3. To participate in a tradition that was passed down to me

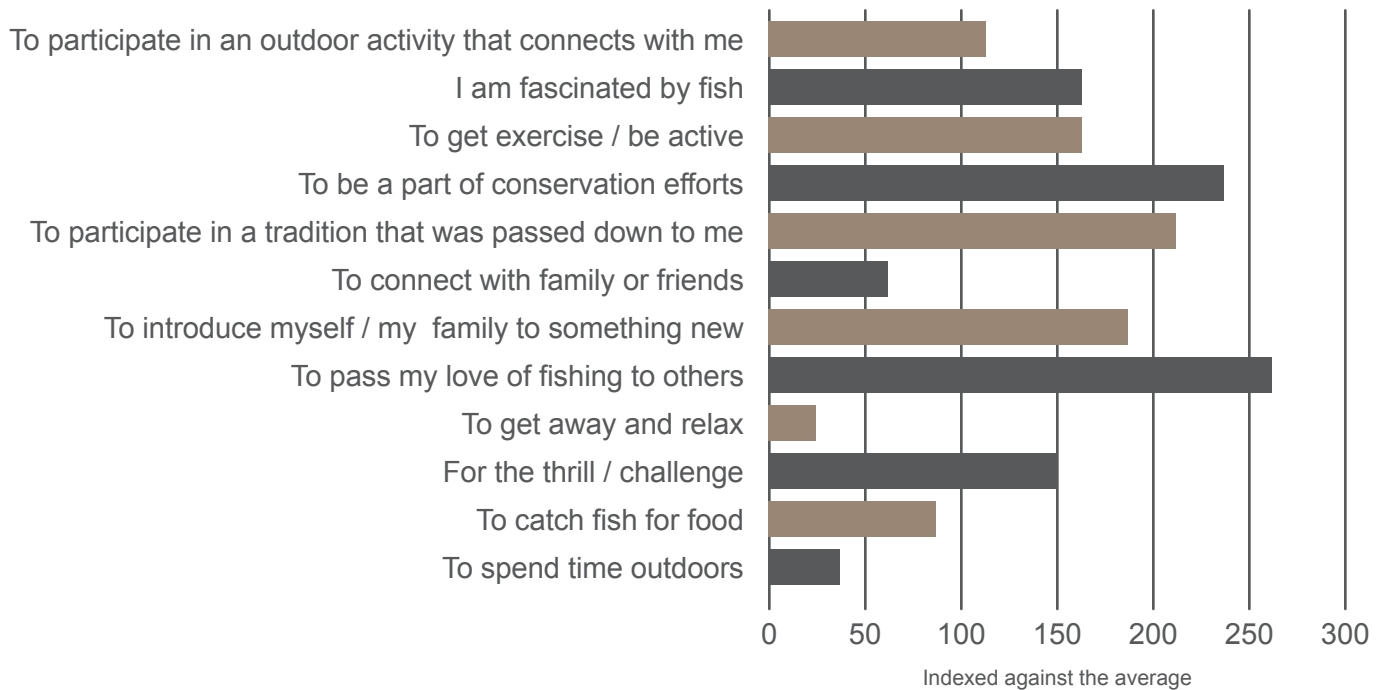


*Bass Pro, Cabela's, etc. **Comfortable w/ the rod, casting, & tackle selection in some settings

— Experience Level —



— Motivations —



— R3 (Recruitment, Retention, Reactivation) —

Q: How old were you when you began fishing?

A: 7 years old

How did you first become interested in fishing?

I was introduced to fishing by an older family member	84.9%
I was introduced to fishing by a friend	7.2%
Television shows / movies	1.7%
Magazines or online publications	0.8%
Social media	0.6%
Clubs or organizations (i.e. Scouts, school club, summer camp)	0.7%
School (PE program, etc.)	0.1%
My child became interested and asked me about fishing	1.3%
Other	2.7%

Who did you first go fishing with?

A parent or grandparent	68.3%
A family member (other than parent or grandparent)	15.6%
A friend, or family friend	12.8%
A club or organization (i.e. Scouts, summer camp, church group)	0.2%
A coworker	0.2%
School or university	0.0%
My child	1.3%
Nobody / by myself	1.5%

Do you expect to go fishing in the next year?

Yes	97.5%
No	2.5%

Which of the following characteristics make a good fishing experience, as you define it?

Catching lots of fish	8.80
Catching only large fish	2.53
Catching a trophy fish	3.42
Enjoying the outdoors	22.33
Having a relaxing time	19.77
Spending time with friends and family	24.15
Catching the species, I am targeting	8.99
Improving my fishing technique	10.00

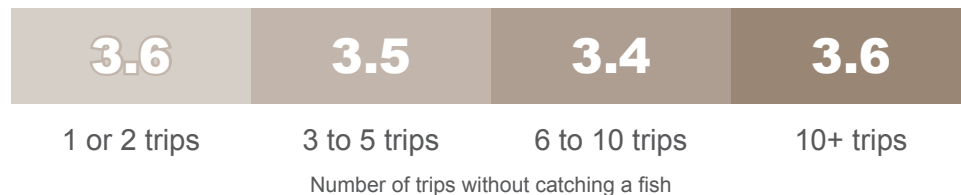
Values reflect a relative rank of each characteristic from most important (higher value) to least important (lower value)

Which factors do you consider most important when selecting a fishing site?

Shorter travel distance / close to home	19.9%
Abundance of fish	35.8%
New site / going somewhere different	15.3%
Water quality/conditions	21.3%
Diversity of fish species	15.8%
Opportunity to catch big fish	39.1%
The scenic beauty	22.7%
Regular fish stocking	5.1%
People on-site to help	2.6%
Education programs offered	1.4%
Lack of crowds	23.2%
Learning of positive fishing information (i.e. a tip about a hotspot from a friend, coworker)	14.3%
No access fees	11.0%
Other activities nearby (playground)	0.2%
Familiar site / I already have access or permission	24.1%
Easy to access	20.1%
Amenities (public bathrooms, picnic tables, parking lot, etc.)	6.0%
Safety	15.3%

Considering your next fishing outing, how would your plans be affected if you didn't catch any fish on your past trips?

The following figure 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.



What other activities or hobbies typically compete against fishing for your time?

My child's activities (sports, etc.)	28.1%
Other clubs, organizations, groups in which I participate (i.e. church groups, sports leagues)	17.1%
Other outdoor recreation activities	39.9%
Family obligations	70.4%
Work obligations	60.7%
School	6.3%
Relaxing at home (television, reading, etc.)	36.9%
Other. Please describe	9.4%

Which of the following reasons has prevented you from fishing at least once in the past year?

Did not have anybody to go with	20.3%
I was not sure where to go	8.1%
Did not have enough money	15.7%
I was not successful, so I did not go again	2.1%
Fishing regulations have gotten too restrictive	6.6%
Health issues	19.8%
Weather	50.4%
Did not have the right equipment	6.0%
Other. Please describe.	8.2%
None of the above – I have not been prevented from fishing at all in the last year	23.0%

Even if you are an avid angler, which of the following might encourage you to fish more often?

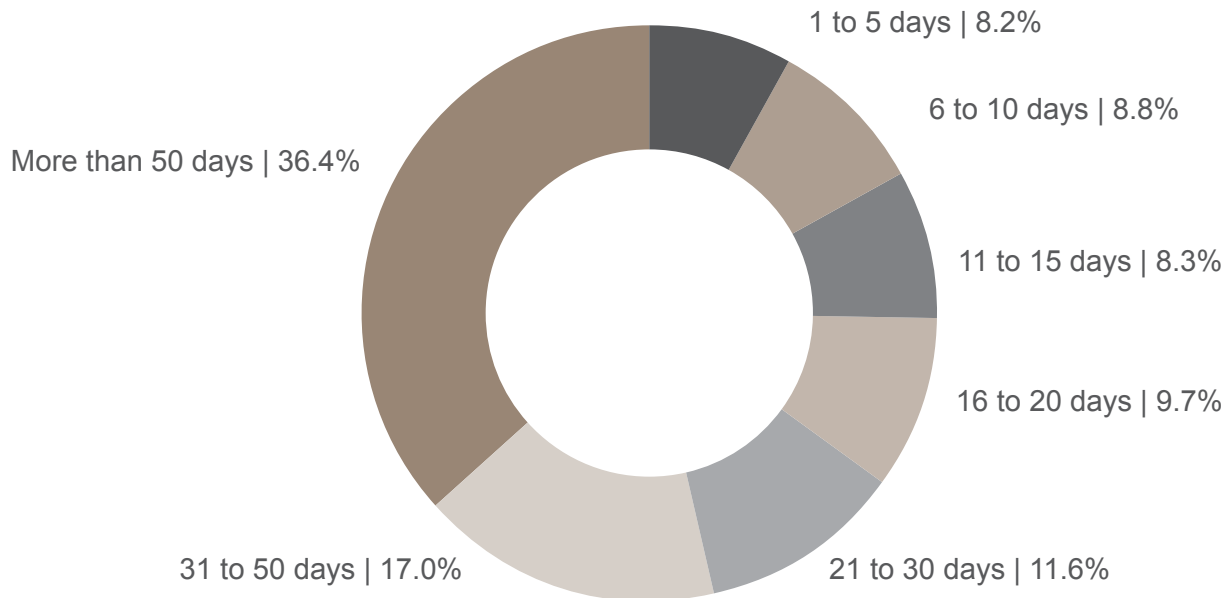
An invitation from a friend or family member to go fish	80.7%
Fishing instruction to improve my knowledge / methods / technique	42.0%
Access to rental or loaner fishing equipment	18.9%
Information and insights from local fishing experts	43.7%
A special beginner event for first-time anglers only	12.1%
Stories about fishing in local online media (blogs, social media, websites)	27.7%
Stories about fishing in local print media	23.5%
Other. Please describe.	6.0%
None of the above	7.5%

— Fishing Activity —

How recently have you been fishing?

Within the past year	87.4%
1 to 3 years ago	6.0%
4 or 5 years ago	1.9%
6 to 10 years ago	1.8%
11 to 20 years ago	1.6%
More than 20 years ago	1.5%

How many days did you fish in the past year?



Percentage of time for types of fishing expected within the next year, or during a typical year?

Freshwater	68.6%
Saltwater	23.7%
Brackish	7.8%

Percentage of time for types of fishing techniques in the next year, or in a typical year?

Fishing with live bait	35.4%
Fishing with artificial bait or lures	53.6%
Fly fishing	11.0%

Which freshwater species do you typically target?

Bass (largemouth, smallmouth, white, sunshine, hybrid, etc.)	85.8%
Carp	12.4%
Catfish	41.7%
Perch or Panfish (crappie, sunfish, bluegill/bream)	60.4%
Pickerel, pike, or muskie	21.6%
Salmon	20.8%
Saugeye	5.8%
Steelhead	12.5%
Sturgeon	5.5%
Trout	47.5%
Walleye	31.7%
Other freshwater species	14.5%

Which saltwater species do you typically target?

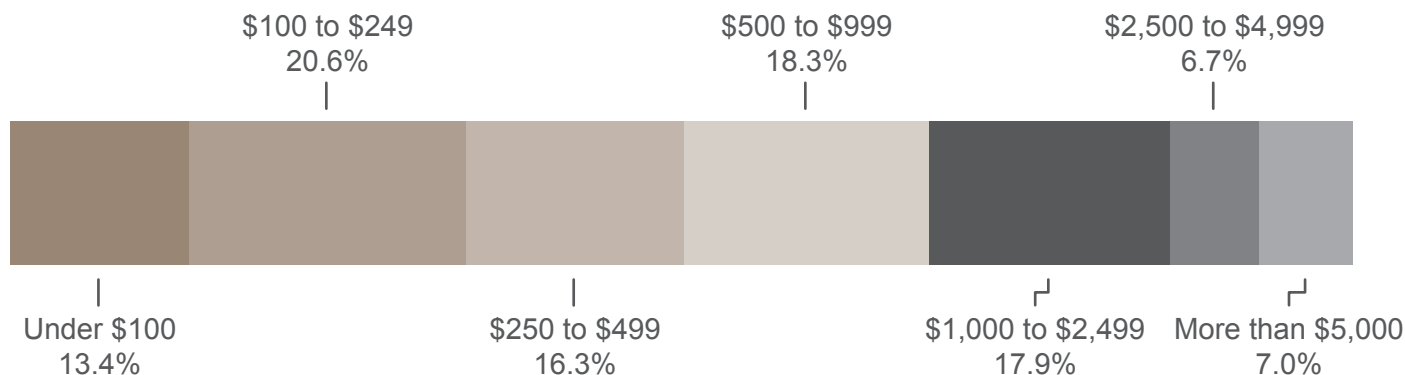
Amberjack	11.5%
Black Drum	17.5%
Bluefish	23.5%
Cod (all species)	24.2%
Flounder	44.1%
Grouper, snapper, sea bass	37.8%
Halibut	18.5%
Mackerel (king, Spanish, Boston, cero, etc.)	25.5%
Permit	3.3%
Redfish, red drum	40.3%
Rockfish (Pacific coast only)	17.0%
Scup	4.7%
Shark	16.7%
Snook	13.4%
Speckled Trout	31.0%
Spotted seatrout or weakfish	16.2%
Striped bass	39.3%
Tarpon	9.1%
Yellow tail	19.1%
Other saltwater species	23.0%

— Spending —

Have you purchased any fishing related items in the past year?

Yes	92.7%
No	7.3%

How much have you spent on fishing equipment within the past year?



Which of the following items have you purchased within the past year?

Reel	57.1%
Rod	61.2%
Combo (rod/reel)	35.4%
Fishing Line	87.1%
Lures and baits (hard, soft, spinner, dough, jig, live bait - not fly fishing)	89.7%
Fishing electronics (GPS, sonar, fish finders)	28.3%

Where do you typically purchase fishing equipment?

Farm/ranch store (Big R, Tractor Supply, etc.)	9.0%
Fishing shows or expos	17.8%
General sporting Goods (Dick's, Academy, etc.)	49.0%
Local bait & tackle shop	63.1%
Mass Merchant (Wal-Mart, Sam's Club)	36.8%
Outdoor Specialty Store (Bass Pro, Cabela's, etc.)	65.6%
Printed catalog (Cabela's, Bass Pro, etc.)	13.9%
Website	40.7%
Other	3.0%

— Media Habits —

Which types of media have you used for fishing related entertainment in the past year?

Television	65.8%
Websites (blogs, online magazines, etc.)	65.0%
Social media	61.6%
Magazines - print	60.0%
State fishing regulation guides	57.5%

What type of fishing related websites do you typically visit?

Online magazines (Field & Stream, Bass Angler, etc.)	72.9%
Forums/chat rooms	46.7%
Websites for manufacturers or retailers	73.0%
State fish & wildlife sites	76.9%
None of the above	1.6%
All of the above	21.8%

Which of the following sources do you find influential when researching fishing information?

Travel & tourism agencies	13.8%
State game & park agency / commission	49.6%
Online forums / blogs	34.7%
Local clubs / organizations	34.6%
Outdoor retailers	40.8%
An endorsement by a general celebrity	7.7%
Outfitters or guides	34.3%
An endorsement by a hunting/fishing/outdoor celebrity	24.2%
Non-profit organizations (i.e. Trout Unlimited, Coastal Conservation Association)	21.5%
A friend / family member	69.7%
TakeMeFishing.org	12.4%
Fishing apps (FishBrain, FishAngler, etc.)	23.2%
Other. Please describe.	3.5%

For details on their use and preference for print, social media and other insights, please refer to the detailed technical report available from www.ASAfishing.org or www.SouthwickAssociates.com.

OCCASIONAL ANGLER

— 13% of U.S. anglers —

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



— 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.

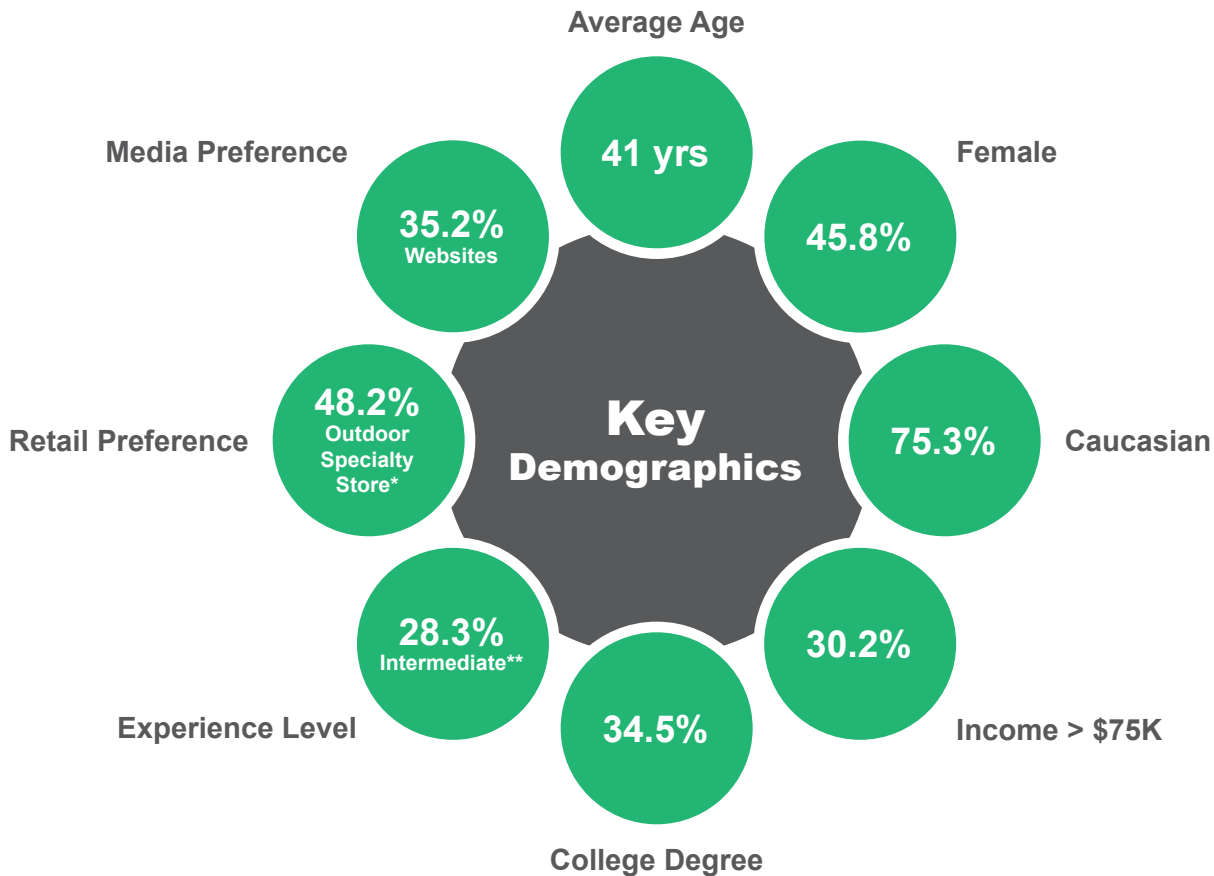
— American Sportfishing Association —

— Topline —

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, its 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.

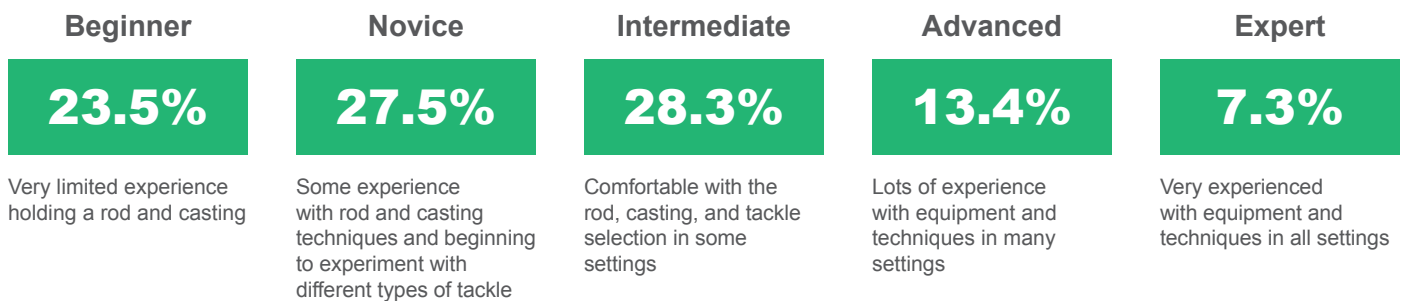
Top 3 Motivations

1. To introduce myself/my family to something new
2. I am fascinated by fish
3. For the thrill/challenge

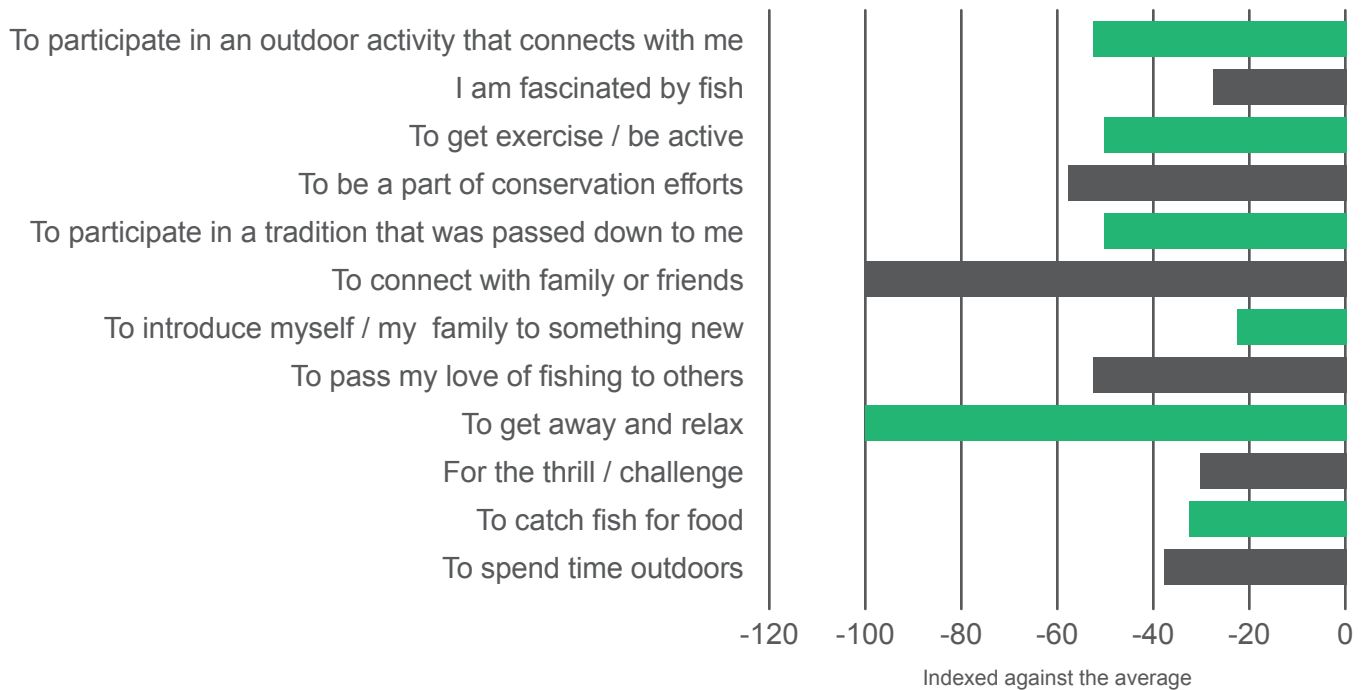


*Bass Pro, Cabela's, etc. **Comfortable w/ the rod, casting, & tackle selection in some settings

— Experience Level —



— Motivations —



— R3 (Recruitment, Retention, Reactivation) —

Q: How old were you when you began fishing?

A: 11 years old

How did you first become interested in fishing?

I was introduced to fishing by an older family member	65.2%
I was introduced to fishing by a friend	14.2%
Television shows / movies	2.5%
Magazines or online publications	1.2%
Social media	3.1%
Clubs or organizations (i.e. Scouts, school club, summer camp)	3.6%
School (PE program, etc.)	1.0%
My child became interested and asked me about fishing	3.8%
Other	5.5%

Who did you first go fishing with?

A parent or grandparent	52.2%
A family member (other than parent or grandparent)	18.9%
A friend, or family friend	17.9%
A club or organization (i.e. Scouts, summer camp, church group)	1.1%
A coworker	0.7%
School or university	1.2%
My child	3.4%
Nobody / by myself	4.6%

Do you expect to go fishing in the next year?

Yes	73.0%
No	27.0%

Which of the following characteristics make a good fishing experience, as you define it?

Catching lots of fish	8.55
Catching only large fish	4.55
Catching a trophy fish	5.03
Enjoying the outdoors	20.81
Having a relaxing time	17.97
Spending time with friends and family	21.39
Catching the species, I am targeting	10.27
Improving my fishing technique	11.44

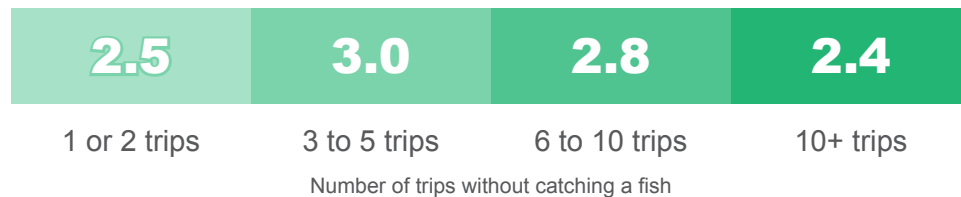
Values reflect a relative rank of each characteristic from most important (higher value) to least important (lower value)

Which factors do you consider most important when selecting a fishing site?

Shorter travel distance / close to home	15.9%
Abundance of fish	24.9%
New site / going somewhere different	9.4%
Water quality/conditions	19.1%
Diversity of fish species	8.6%
Opportunity to catch big fish	20.0%
The scenic beauty	16.3%
Regular fish stocking	7.8%
People on-site to help	1.9%
Education programs offered	1.7%
Lack of crowds	26.7%
Learning of positive fishing information (i.e. a tip about a hotspot from a friend, coworker)	8.6%
No access fees	15.3%
Other activities nearby (playground)	4.4%
Familiar site / I already have access or permission	14.9%
Easy to access	26.2%
Amenities (public bathrooms, picnic tables, parking lot, etc.)	7.8%
Safety	18.0%

Considering your next fishing outing, how would your plans be affected if you didn't catch any fish on your past trips?

The following figure 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.



What other activities or hobbies typically compete against fishing for your time?

My child's activities (sports, etc.)	18.0%
Other clubs, organizations, groups in which I participate (i.e. church groups, sports leagues)	18.8%
Other outdoor recreation activities	33.8%
Family obligations	41.2%
Work obligations	43.6%
School	12.3%
Relaxing at home (television, reading, etc.)	44.4%
Other. Please describe	9.1%

Which of the following reasons has prevented you from fishing at least once in the past year?

Did not have anybody to go with	14.6%
I was not sure where to go	7.1%
Did not have enough money	16.6%
I was not successful, so I did not go again	8.8%
Fishing regulations have gotten too restrictive	8.2%
Health issues	12.4%
Weather	28.1%
Did not have the right equipment	19.3%
Other. Please describe.	5.0%
None of the above – I have not been prevented from fishing at all in the last year	28.2%

Even if you are an avid angler, which of the following might encourage you to fish more often?

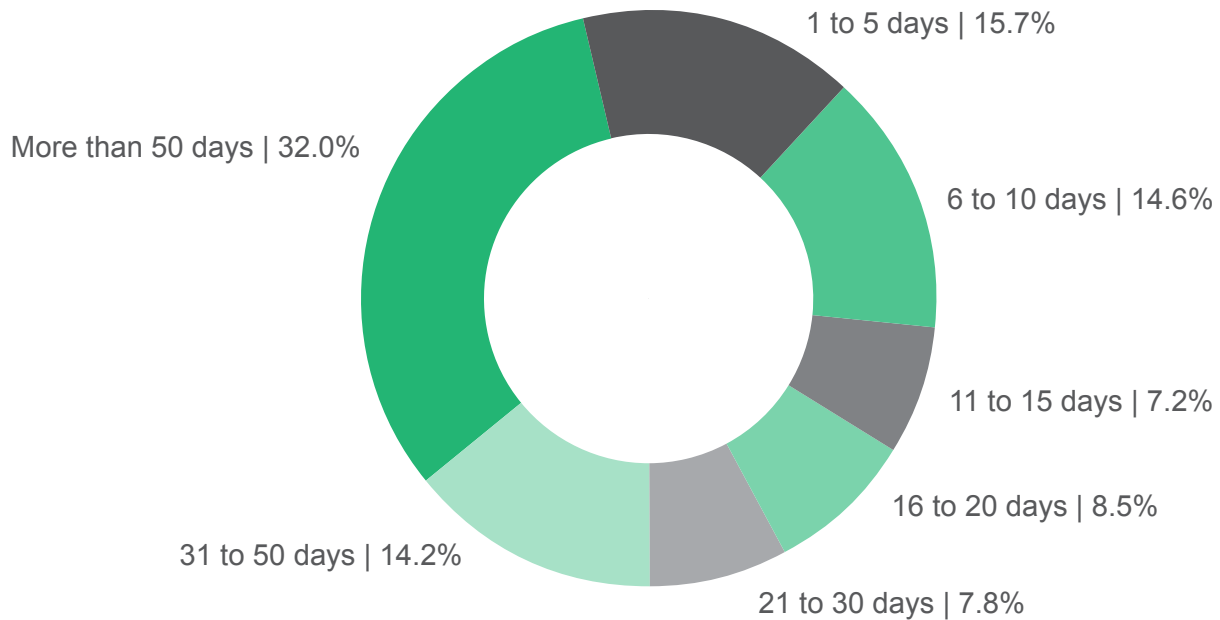
An invitation from a friend or family member to go fish	45.6%
Fishing instruction to improve my knowledge / methods / technique	30.1%
Access to rental or loaner fishing equipment	8.9%
Information and insights from local fishing experts	15.5%
A special beginner event for first-time anglers only	12.7%
Stories about fishing in local online media (blogs, social media, websites)	8.8%
Stories about fishing in local print media	4.9%
Other. Please describe.	4.1%
None of the above	20.4%

— Fishing Activity —

How recently have you been fishing?

Within the past year	43.9%
1 to 3 years ago	14.1%
4 or 5 years ago	10.4%
6 to 10 years ago	11.2%
11 to 20 years ago	9.6%
More than 20 years ago	10.8%

How many days did you fish in the past year?



Percentage of time for types of fishing expected within the next year, or during a typical year?

Freshwater	59.8%
Saltwater	29.5%
Brackish	10.7%

Percentage of time for types of fishing techniques in the next year, or in a typical year?

Fishing with live bait	41.4%
Fishing with artificial bait or lures	45.6%
Fly fishing	13.0%

Which freshwater species do you typically target?

Bass (largemouth, smallmouth, white, sunshine, hybrid, etc.)	65.7%
Carp	9.0%
Catfish	36.2%
Perch or Panfish (crappie, sunfish, bluegill/bream)	31.5%
Pickerel, pike, or muskie	6.5%
Salmon	12.2%
Saugeye	1.1%
Steelhead	2.6%
Sturgeon	1.8%
Trout	32.5%
Walleye	13.6%
Other freshwater species	13.0%

Which saltwater species do you typically target?

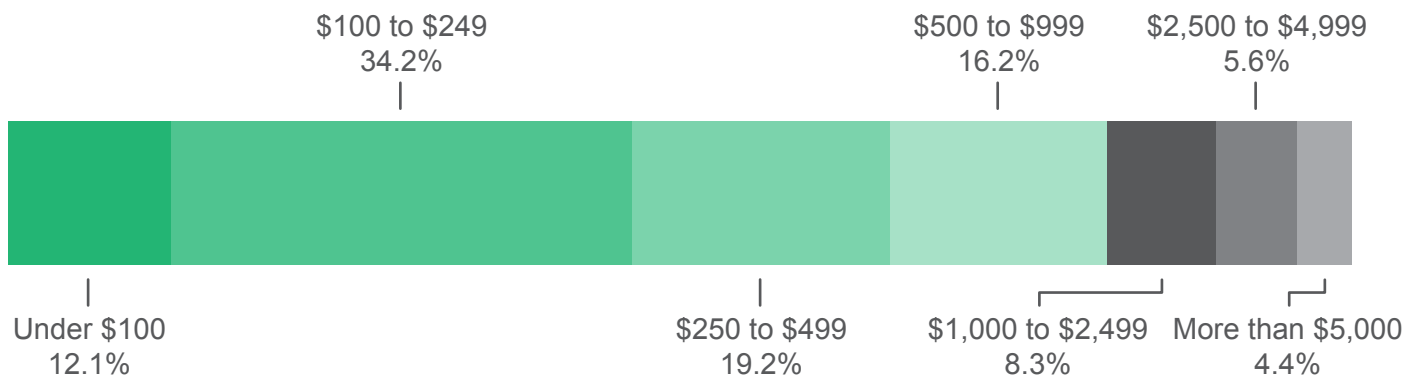
Amberjack	8.2%
Black Drum	9.9%
Bluefish	24.5%
Cod (all species)	18.1%
Flounder	30.4%
Grouper, snapper, sea bass	27.0%
Halibut	14.6%
Mackerel (king, Spanish, Boston, cero, etc.)	12.3%
Permit	4.0%
Redfish, red drum	18.9%
Rockfish (Pacific coast only)	1.9%
Scup	4.8%
Shark	9.2%
Snook	9.5%
Speckled Trout	16.3%
Spotted seatrout or weakfish	7.7%
Striped bass	27.4%
Tarpon	11.3%
Yellow tail	13.7%
Other saltwater species	15.4%

— Spending —

Have you purchased any fishing related items in the past year?

Yes	53.6%
No	46.4%

How much have you spent on fishing equipment within the past year?



Which of the following items have you purchased within the past year?

Reel	51.2%
Rod	49.5%
Combo (rod/reel)	27.7%
Fishing Line	68.7%
Lures and baits (hard, soft, spinner, dough, jig, live bait - not fly fishing)	64.7%
Fishing electronics (GPS, sonar, fish finders)	25.2%

Where do you typically purchase fishing equipment?

Farm/ranch store (Big R, Tractor Supply, etc.)	7.9%
Fishing shows or expos	14.6%
General sporting Goods (Dick's, Academy, etc.)	40.2%
Local bait & tackle shop	29.6%
Mass Merchant (Wal-Mart, Sam's Club)	26.0%
Outdoor Specialty Store (Bass Pro, Cabela's, etc.)	48.2%
Printed catalog (Cabela's, Bass Pro, etc.)	13.3%
Website	23.7%
Other	2.8%

— Media Habits —

Which types of media have you used for fishing related entertainment in the past year?

Websites (blogs, online magazines, etc.)	35.2%
None	32.8%
Magazines - print	31.7%
Television	31.2%
Social media	27.4%

What type of fishing related websites do you typically visit?

Online magazines (Field & Stream, Bass Angler, etc.)	46.3%
Forums/chat rooms	36.0%
Websites for manufacturers or retailers	66.0%
State fish & wildlife sites	59.7%
None of the above	5.8%
All of the above	13.0%

Which of the following sources do you find influential when researching fishing information?

Travel & tourism agencies	7.0%
State game & park agency / commission	19.0%
Online forums / blogs	35.3%
Local clubs / organizations	23.5%
Outdoor retailers	20.0%
An endorsement by a general celebrity	7.3%
Outfitters or guides	14.3%
An endorsement by a hunting/fishing/outdoor celebrity	16.9%
Non-profit organizations (i.e. Trout Unlimited, Coastal Conservation Association)	8.5%
A friend / family member	42.0%
TakeMeFishing.org	4.0%
Fishing apps (FishBrain, FishAngler, etc.)	20.8%
Other. Please describe.	0.6%

For details on their use and preference for print, social media and other insights, please refer to the detailed technical report available from www.ASAfishing.org or www.SouthwickAssociates.com.

FRIENDLY FISHER

— 16% of U.S. anglers —

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



— 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.

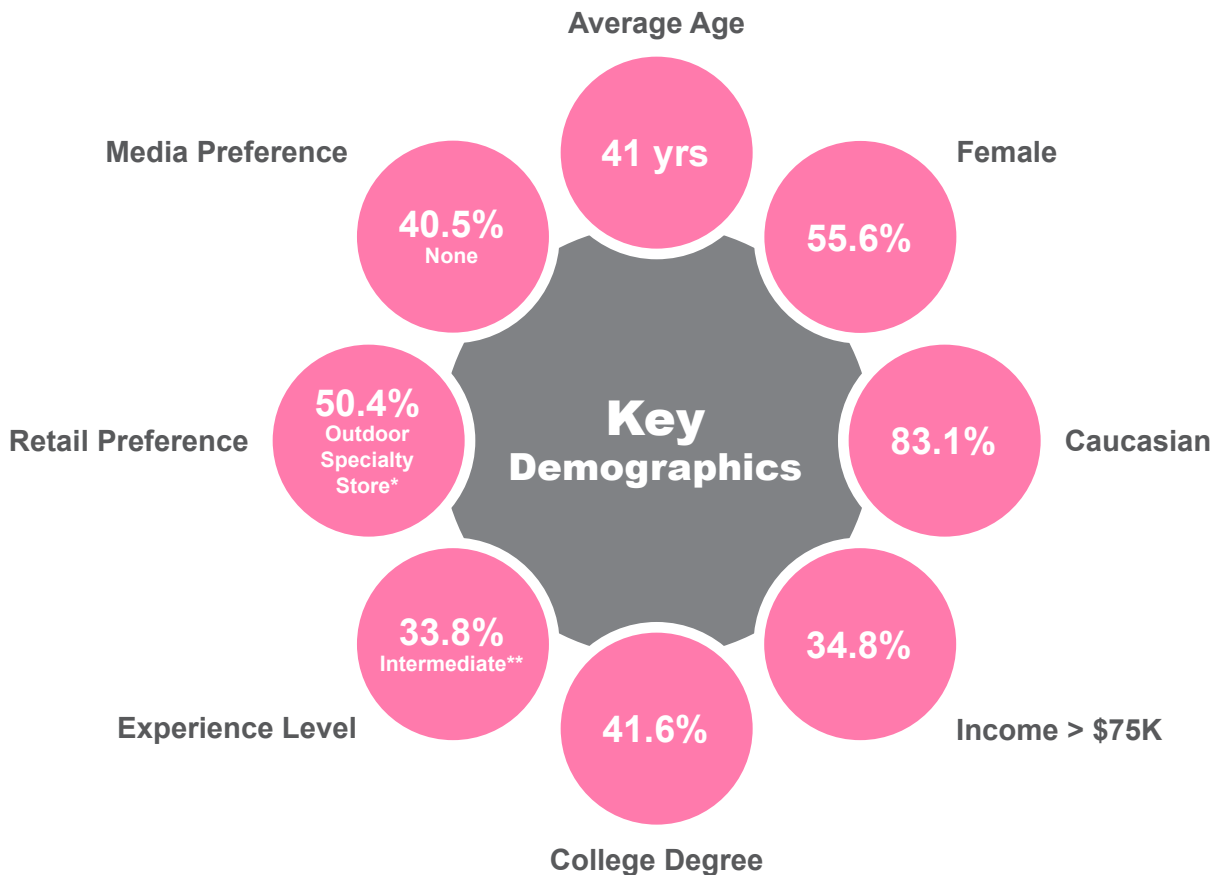
— American Sportfishing Association —

— Topline —

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 the Northeast.

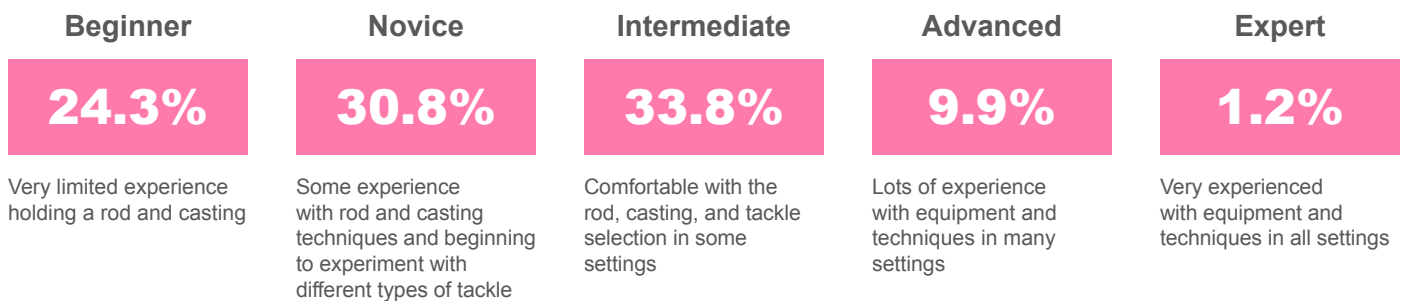
Top 3 Motivations

1. To connect with family or friends
2. To spend times outdoors
3. To get away and relax

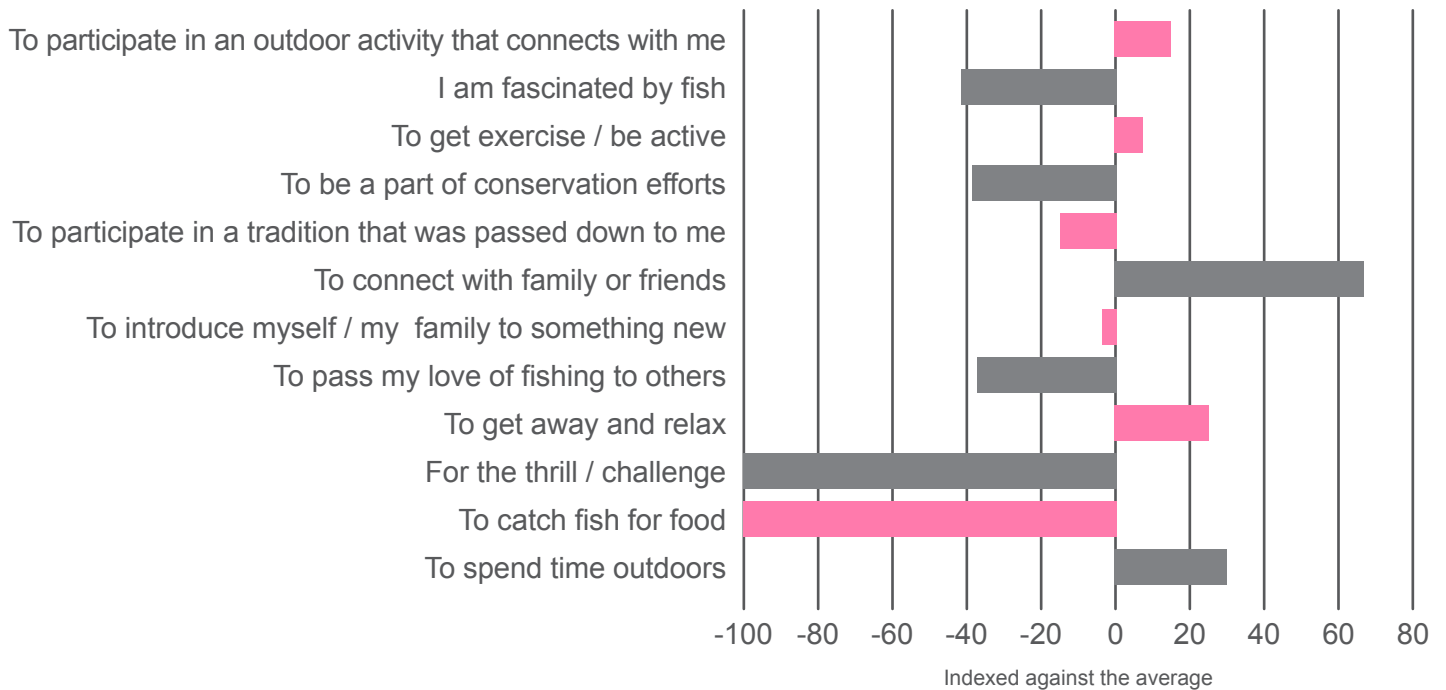


*Bass Pro, Cabela's, etc. **Comfortable w/ the rod, casting, & tackle selection in some settings

— Experience Level —



— Motivations —



— R3 (Recruitment, Retention, Reactivation) —

Q: How old were you when you began fishing?

A: 10 years old

How did you first become interested in fishing?

I was introduced to fishing by an older family member	74.0%
I was introduced to fishing by a friend	14.9%
Television shows / movies	1.5%
Magazines or online publications	0.6%
Social media	0.4%
Clubs or organizations (i.e. Scouts, school club, summer camp)	2.5%
School (PE program, etc.)	0.8%
My child became interested and asked me about fishing	2.9%
Other	2.4%

Who did you first go fishing with?

A parent or grandparent	53.2%
A family member (other than parent or grandparent)	17.9%
A friend, or family friend	22.0%
A club or organization (i.e. Scouts, summer camp, church group)	1.8%
A coworker	0.6%
School or university	0.4%
My child	2.4%
Nobody / by myself	1.8%

Do you expect to go fishing in the next year?

Yes	80.7%
No	19.3%

Which of the following characteristics make a good fishing experience, as you define it?

Catching lots of fish	5.85
Catching only large fish	1.59
Catching a trophy fish	1.92
Enjoying the outdoors	25.68
Having a relaxing time	25.07
Spending time with friends and family	26.66
Catching the species, I am targeting	5.41
Improving my fishing technique	7.83

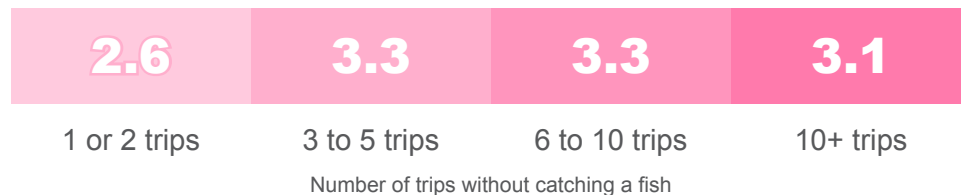
Values reflect a relative rank of each characteristic from most important (higher value) to least important (lower value)

Which factors do you consider most important when selecting a fishing site?

Shorter travel distance / close to home	24.5%
Abundance of fish	27.2%
New site / going somewhere different	5.4%
Water quality/conditions	24.5%
Diversity of fish species	6.9%
Opportunity to catch big fish	16.4%
The scenic beauty	36.1%
Regular fish stocking	3.1%
People on-site to help	2.4%
Education programs offered	1.5%
Lack of crowds	38.2%
Learning of positive fishing information (i.e. a tip about a hotspot from a friend, coworker)	6.5%
No access fees	16.6%
Other activities nearby (playground)	5.6%
Familiar site / I already have access or permission	21.5%
Easy to access	24.6%
Amenities (public bathrooms, picnic tables, parking lot, etc.)	9.2%
Safety	13.4%

Considering your next fishing outing, how would your plans be affected if you didn't catch any fish on your past trips?

The following figure 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.



What other activities or hobbies typically compete against fishing for your time?

My child's activities (sports, etc.)	25.3%
Other clubs, organizations, groups in which I participate (i.e. church groups, sports leagues)	13.6%
Other outdoor recreation activities	40.6%
Family obligations	60.4%
Work obligations	40.9%
School	10.0%
Relaxing at home (television, reading, etc.)	47.4%
Other. Please describe	9.6%

Which of the following reasons has prevented you from fishing at least once in the past year?

Did not have anybody to go with	34.7%
I was not sure where to go	8.5%
Did not have enough money	15.3%
I was not successful, so I did not go again	2.3%
Fishing regulations have gotten too restrictive	8.3%
Health issues	19.8%
Weather	33.5%
Did not have the right equipment	13.9%
Other. Please describe.	7.1%
None of the above – I have not been prevented from fishing at all in the last year	21.1%

Even if you are an avid angler, which of the following might encourage you to fish more often?

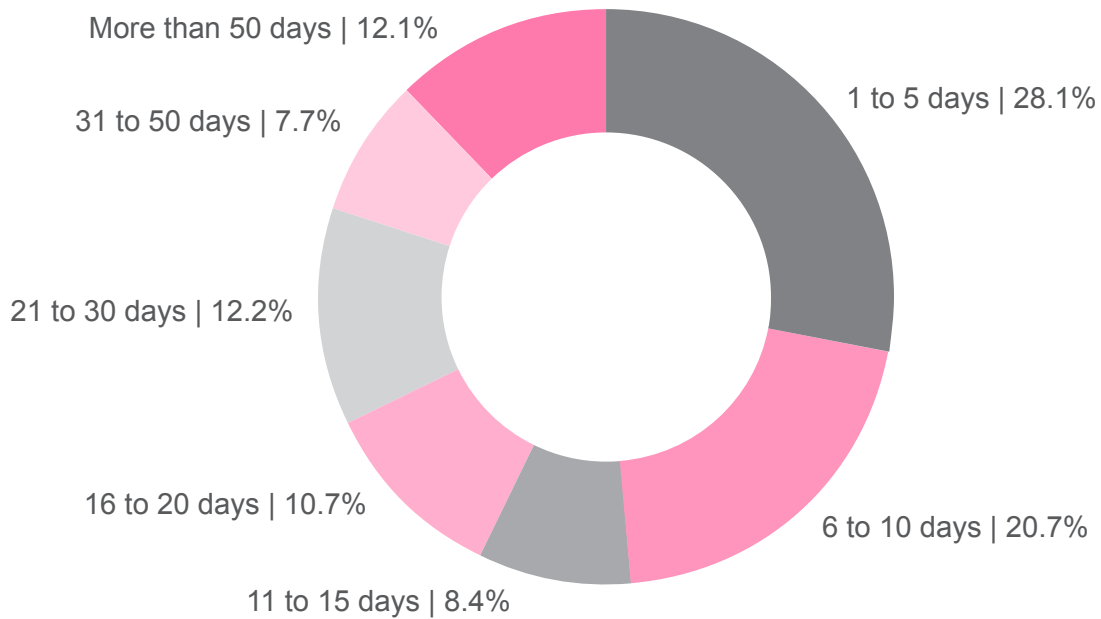
An invitation from a friend or family member to go fish	80.7%
Fishing instruction to improve my knowledge / methods / technique	24.0%
Access to rental or loaner fishing equipment	15.6%
Information and insights from local fishing experts	16.4%
A special beginner event for first-time anglers only	10.8%
Stories about fishing in local online media (blogs, social media, websites)	5.3%
Stories about fishing in local print media	9.0%
Other. Please describe.	5.3%
None of the above	6.6%

— Fishing Activity —

How recently have you been fishing?

Within the past year	41.6%
1 to 3 years ago	20.3%
4 or 5 years ago	11.6%
6 to 10 years ago	9.6%
11 to 20 years ago	10.4%
More than 20 years ago	6.6%

How many days did you fish in the past year?



Percentage of time for types of fishing expected within the next year, or during a typical year?

Freshwater	67.1%
Saltwater	26.2%
Brackish	6.8%

Percentage of time for types of fishing techniques in the next year, or in a typical year?

Fishing with live bait	45.3%
Fishing with artificial bait or lures	45.7%
Fly fishing	8.9%

Which freshwater species do you typically target?

Bass (largemouth, smallmouth, white, sunshine, hybrid, etc.)	65.2%
Carp	11.5%
Catfish	42.3%
Perch or Panfish (crappie, sunfish, bluegill/bream)	31.9%
Pickerel, pike, or muskie	7.9%
Salmon	11.3%
Saugeye	2.0%
Steelhead	3.7%
Sturgeon	1.8%
Trout	39.1%
Walleye	15.6%
Other freshwater species	10.0%

Which saltwater species do you typically target?

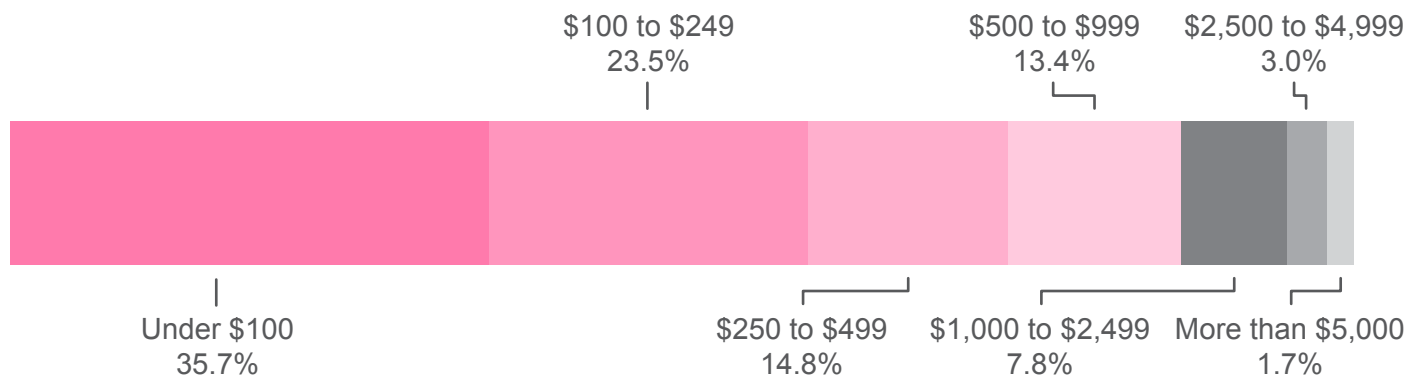
Amberjack	7.0%
Black Drum	6.4%
Bluefish	19.5%
Cod (all species)	31.3%
Flounder	41.7%
Grouper, snapper, sea bass	24.0%
Halibut	14.3%
Mackerel (king, Spanish, Boston, cero, etc.)	10.7%
Permit	5.4%
Redfish, red drum	18.5%
Rockfish (Pacific coast only)	4.6%
Scup	6.0%
Shark	10.3%
Snook	10.8%
Speckled Trout	19.0%
Spotted seatrout or weakfish	6.5%
Striped bass	27.8%
Tarpon	8.7%
Yellow tail	13.4%
Other saltwater species	9.0%

— Spending —

Have you purchased any fishing related items in the past year?

Yes	49.1%
No	50.9%

How much have you spent on fishing equipment within the past year?



Which of the following items have you purchased within the past year?

Reel	34.3%
Rod	37.6%
Combo (rod/reel)	34.9%
Fishing Line	70.2%
Lures and baits (hard, soft, spinner, dough, jig, live bait - not fly fishing)	83.6%
Fishing electronics (GPS, sonar, fish finders)	14.9%

Where do you typically purchase fishing equipment?

Farm/ranch store (Big R, Tractor Supply, etc.)	6.4%
Fishing shows or expos	8.6%
General sporting Goods (Dick's, Academy, etc.)	30.9%
Local bait & tackle shop	48.9%
Mass Merchant (Wal-Mart, Sam's Club)	34.8%
Outdoor Specialty Store (Bass Pro, Cabela's, etc.)	50.4%
Printed catalog (Cabela's, Bass Pro, etc.)	19.3%
Website	21.8%
Other	2.0%

— Media Habits —

Which types of media have you used for fishing related entertainment in the past year?

None	40.5%
Websites (blogs, online magazines, etc.)	29.4%
Television	29.2%
Social media	26.9%
State fishing regulation guides	24.2%

What type of fishing related websites do you typically visit?

Online magazines (Field & Stream, Bass Angler, etc.)	38.7%
Forums/chat rooms	28.2%
Websites for manufacturers or retailers	49.8%
State fish & wildlife sites	70.4%
None of the above	6.9%
All of the above	3.8%

Which of the following sources do you find influential when researching fishing information?

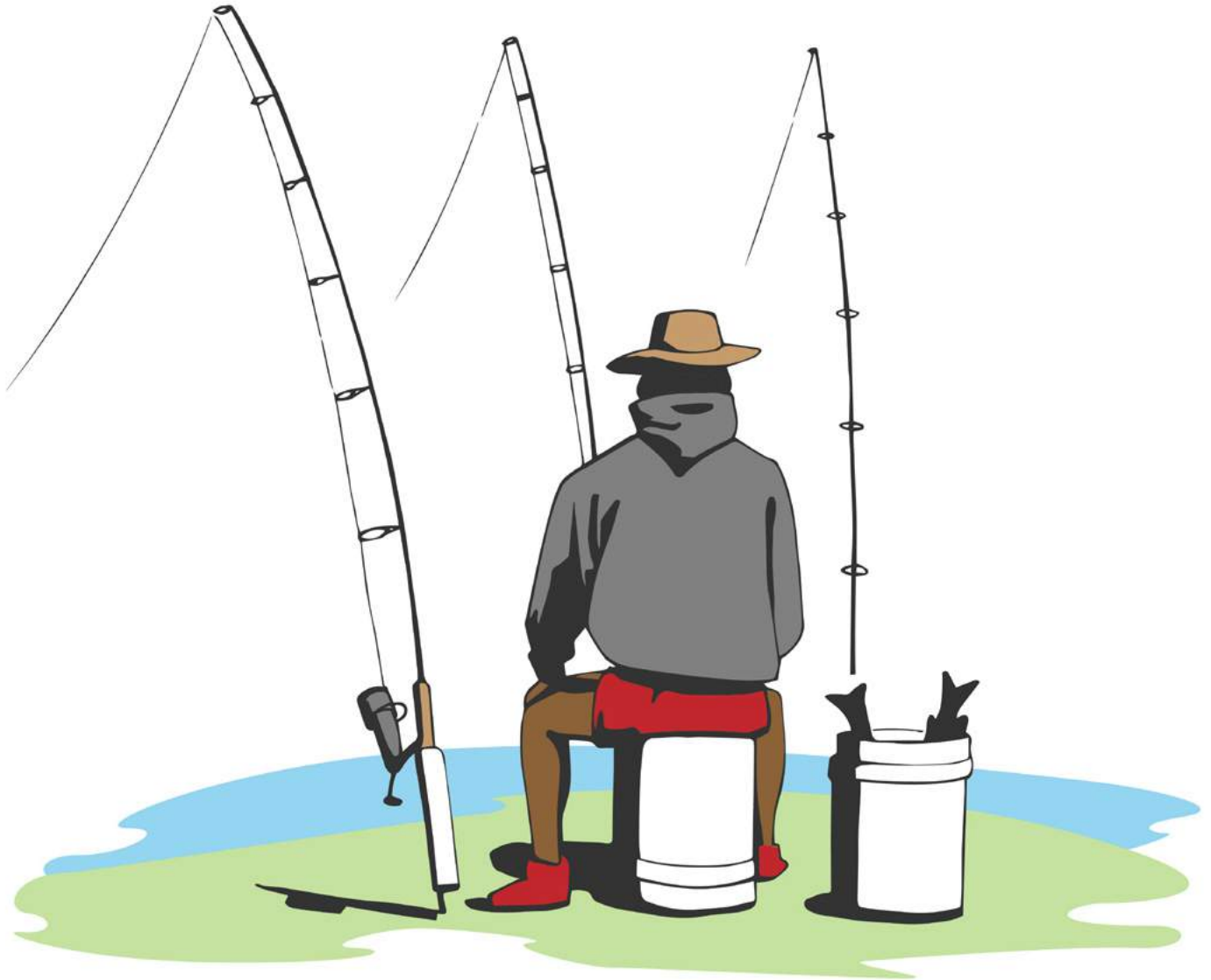
Travel & tourism agencies	15.7%
State game & park agency / commission	40.2%
Online forums / blogs	20.4%
Local clubs / organizations	28.8%
Outdoor retailers	18.6%
An endorsement by a general celebrity	6.7%
Outfitters or guides	17.4%
An endorsement by a hunting/fishing/outdoor celebrity	12.0%
Non-profit organizations (i.e. Trout Unlimited, Coastal Conservation Association)	17.7%
A friend / family member	56.2%
TakeMeFishing.org	16.3%
Fishing apps (FishBrain, FishAngler, etc.)	16.6%
Other. Please describe.	2.2%

For details on their use and preference for print, social media and other insights, please refer to the detailed technical report available from www.ASAfishing.org or www.SouthwickAssociates.com.

CONSUMPTIVE ANGLER

— 12% of U.S. anglers —

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



— 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.

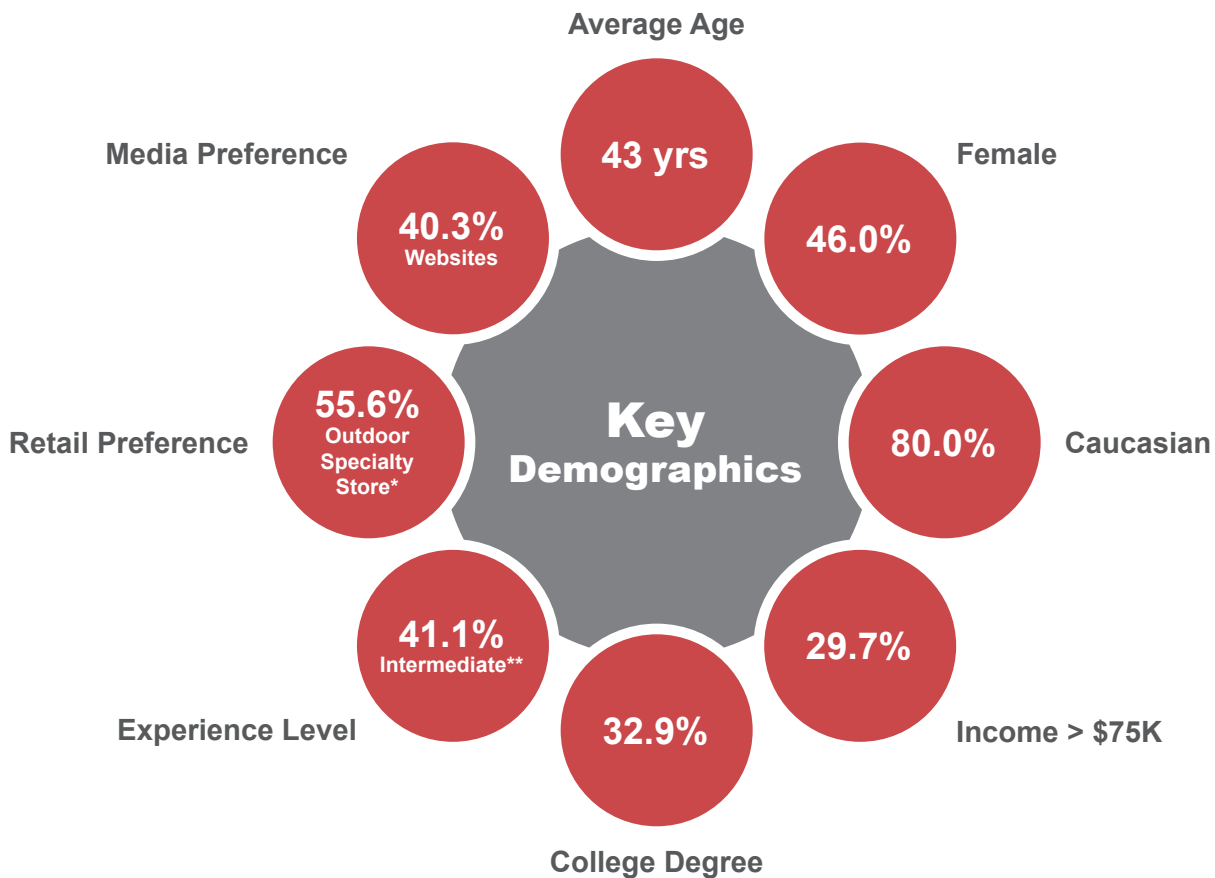
— American Sportfishing Association —

— Topline —

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 live in the South (39.9%) than other regions. About a quarter of them reside in the West (25.4%) and Midwest (23.9%), and the other 10.8% live in the Northeast.

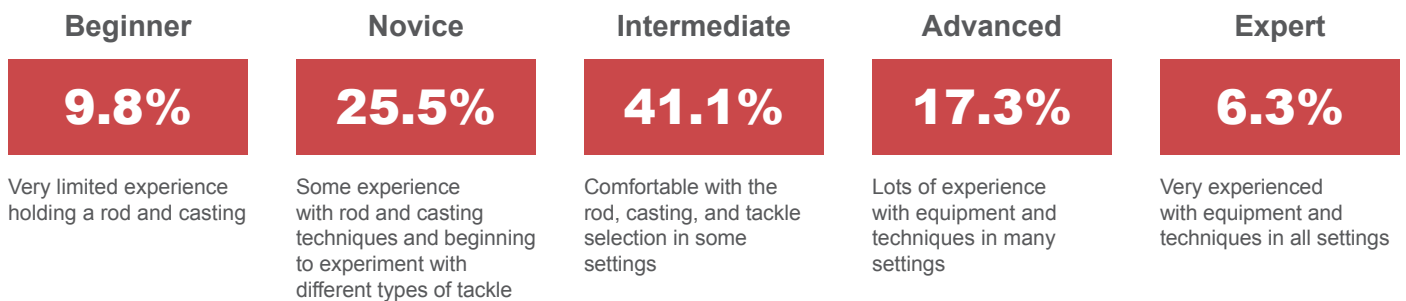
Top 3 Motivations

1. To catch fish for food
2. To participate in a tradition that was passed down to me
3. To pass on my love of fishing to others

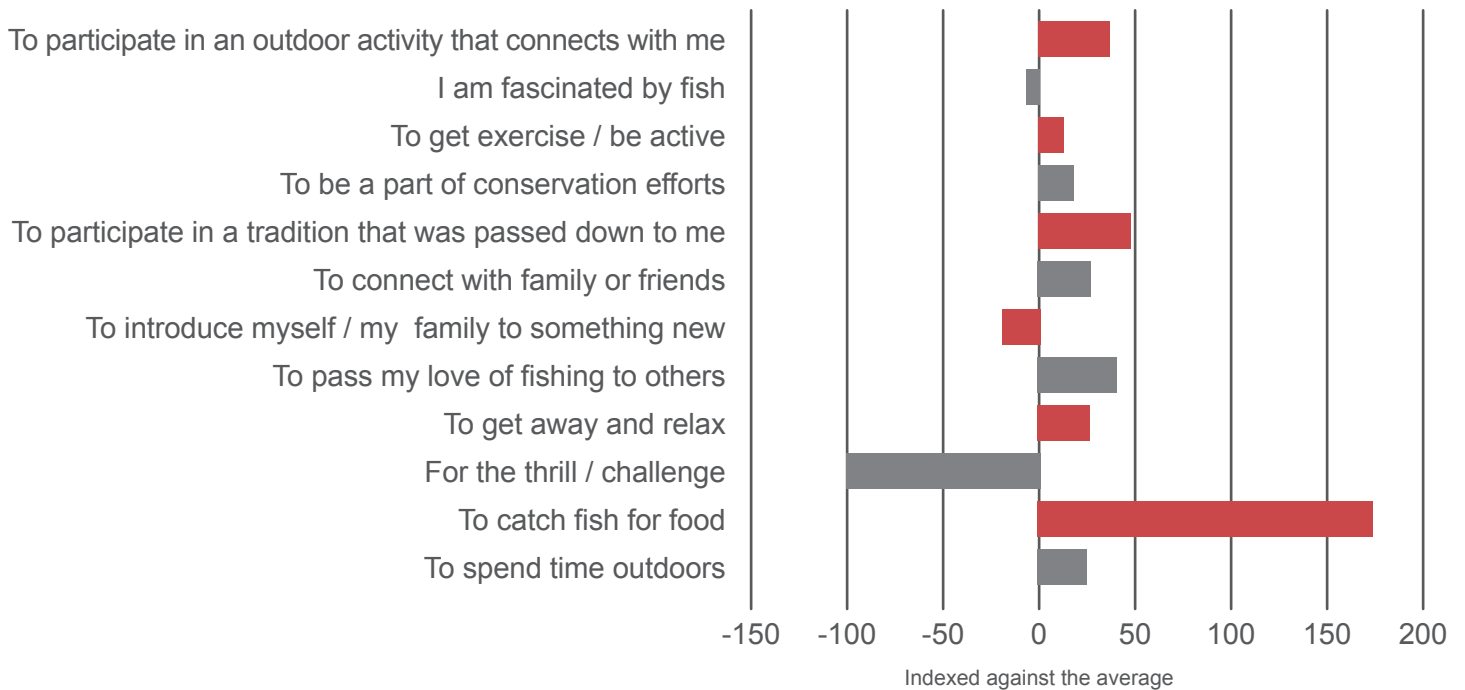


*Bass Pro, Cabela's, etc. **Comfortable w/ the rod, casting, & tackle selection in some settings

— Experience Level —



— Motivations —



— R3 (Recruitment, Retention, Reactivation) —

Q: How old were you when you began fishing?

A: 9 years old

How did you first become interested in fishing?

I was introduced to fishing by an older family member	78.4%
I was introduced to fishing by a friend	13.4%
Television shows / movies	1.9%
Magazines or online publications	0.5%
Social media	0.4%
Clubs or organizations (i.e. Scouts, school club, summer camp)	1.0%
School (PE program, etc.)	0.4%
My child became interested and asked me about fishing	1.1%
Other	2.9%

Who did you first go fishing with?

A parent or grandparent	61.6%
A family member (other than parent or grandparent)	16.5%
A friend, or family friend	18.3%
A club or organization (i.e. Scouts, summer camp, church group)	0.2%
A coworker	0.6%
School or university	0.3%
My child	0.7%
Nobody / by myself	1.8%

Do you expect to go fishing in the next year?

Yes	89.8%
No	10.2%

Which of the following characteristics make a good fishing experience, as you define it?

Catching lots of fish	7.58
Catching only large fish	1.78
Catching a trophy fish	1.87
Enjoying the outdoors	24.78
Having a relaxing time	22.88
Spending time with friends and family	25.87
Catching the species, I am targeting	7.09
Improving my fishing technique	8.14

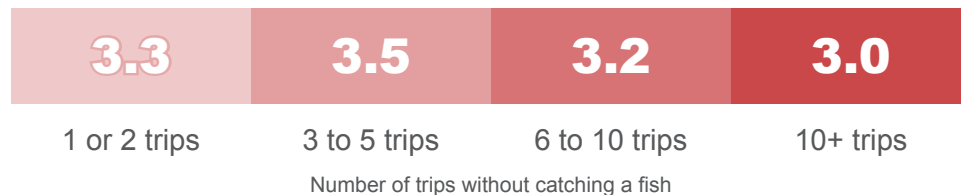
Values reflect a relative rank of each characteristic from most important (higher value) to least important (lower value)

Which factors do you consider most important when selecting a fishing site?

Shorter travel distance / close to home	23.3%
Abundance of fish	27.4%
New site / going somewhere different	6.2%
Water quality/conditions	22.9%
Diversity of fish species	7.2%
Opportunity to catch big fish	22.6%
The scenic beauty	21.2%
Regular fish stocking	8.9%
People on-site to help	5.0%
Education programs offered	0.4%
Lack of crowds	34.0%
Learning of positive fishing information (i.e. a tip about a hotspot from a friend, coworker)	9.4%
No access fees	19.2%
Other activities nearby (playground)	0.5%
Familiar site / I already have access or permission	28.7%
Easy to access	23.8%
Amenities (public bathrooms, picnic tables, parking lot, etc.)	12.7%
Safety	11.3%

Considering your next fishing outing, how would your plans be affected if you didn't catch any fish on your past trips?

The following figure 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.



What other activities or hobbies typically compete against fishing for your time?

My child's activities (sports, etc.)	14.4%
Other clubs, organizations, groups in which I participate (i.e. church groups, sports leagues)	16.6%
Other outdoor recreation activities	43.6%
Family obligations	63.0%
Work obligations	53.3%
School	4.5%
Relaxing at home (television, reading, etc.)	32.7%
Other. Please describe	9.4%

Which of the following reasons has prevented you from fishing at least once in the past year?

Did not have anybody to go with	29.6%
I was not sure where to go	7.3%
Did not have enough money	12.6%
I was not successful, so I did not go again	0.8%
Fishing regulations have gotten too restrictive	8.3%
Health issues	20.8%
Weather	46.0%
Did not have the right equipment	10.4%
Other. Please describe.	6.5%
None of the above – I have not been prevented from fishing at all in the last year	20.1%

Even if you are an avid angler, which of the following might encourage you to fish more often?

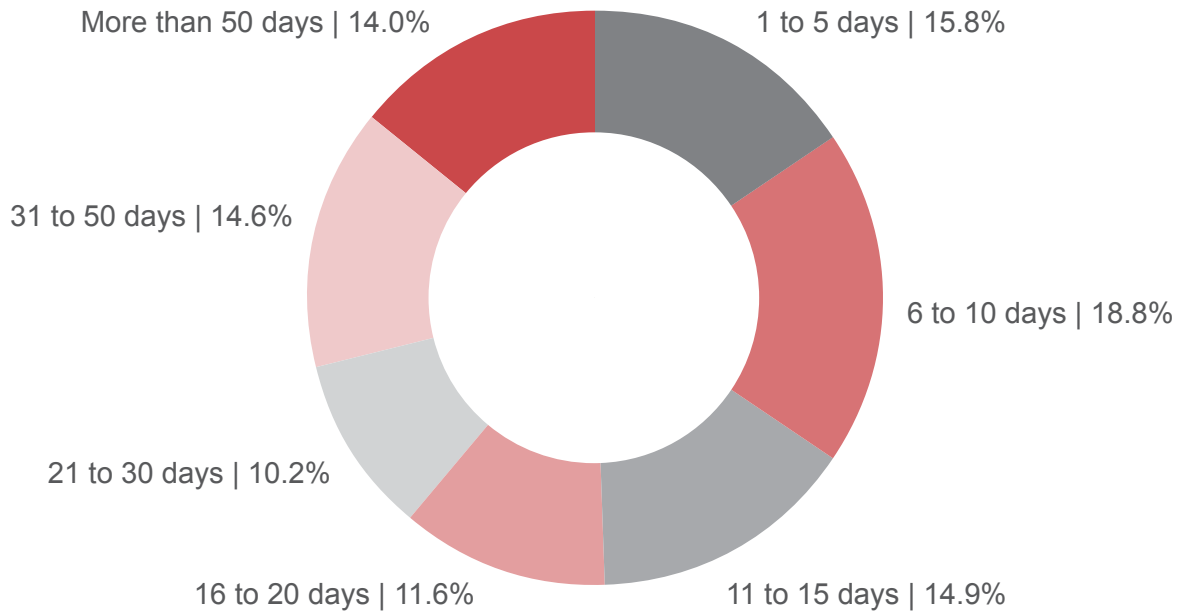
An invitation from a friend or family member to go fish	76.5%
Fishing instruction to improve my knowledge / methods / technique	20.0%
Access to rental or loaner fishing equipment	11.9%
Information and insights from local fishing experts	26.9%
A special beginner event for first-time anglers only	5.3%
Stories about fishing in local online media (blogs, social media, websites)	11.8%
Stories about fishing in local print media	12.4%
Other. Please describe.	5.8%
None of the above	11.4%

— Fishing Activity —

How recently have you been fishing?

Within the past year	59.8%
1 to 3 years ago	15.8%
4 or 5 years ago	7.5%
6 to 10 years ago	5.6%
11 to 20 years ago	6.2%
More than 20 years ago	5.2%

How many days did you fish in the past year?



Percentage of time for types of fishing expected within the next year, or during a typical year?

Freshwater	66.3%
Saltwater	26.6%
Brackish	7.1%

Percentage of time for types of fishing techniques in the next year, or in a typical year?

Fishing with live bait	47.3%
Fishing with artificial bait or lures	43.9%
Fly fishing	8.8%

Which freshwater species do you typically target?

Bass (largemouth, smallmouth, white, sunshine, hybrid, etc.)	69.9%
Carp	10.3%
Catfish	48.3%
Perch or Panfish (crappie, sunfish, bluegill/bream)	53.1%
Pickerel, pike, or muskie	11.7%
Salmon	15.4%
Saugeye	3.4%
Steelhead	5.7%
Sturgeon	2.7%
Trout	43.9%
Walleye	26.0%
Other freshwater species	13.6%

Which saltwater species do you typically target?

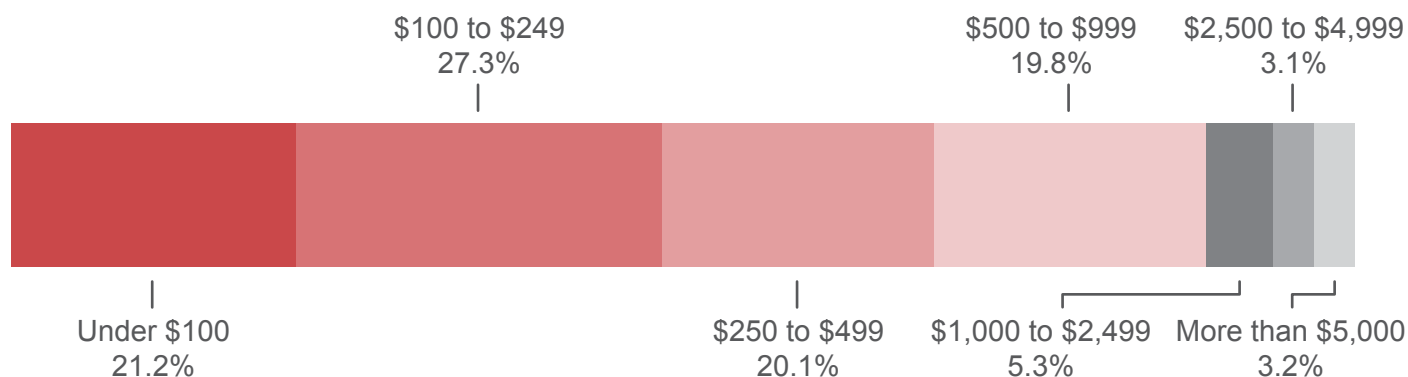
Amberjack	5.2%
Black Drum	9.3%
Bluefish	18.5%
Cod (all species)	24.1%
Flounder	38.7%
Grouper, snapper, sea bass	27.9%
Halibut	15.7%
Mackerel (king, Spanish, Boston, cero, etc.)	16.2%
Permit	1.9%
Redfish, red drum	32.2%
Rockfish (Pacific coast only)	13.2%
Scup	2.0%
Shark	6.7%
Snook	6.2%
Speckled Trout	26.0%
Spotted seatrout or weakfish	10.3%
Striped bass	29.5%
Tarpon	4.7%
Yellow tail	13.1%
Other saltwater species	18.8%

— Spending —

Have you purchased any fishing related items in the past year?

Yes	57.0%
No	43.0%

How much have you spent on fishing equipment within the past year?



Which of the following items have you purchased within the past year?

Reel	42.6%
Rod	51.7%
Combo (rod/reel)	39.4%
Fishing Line	86.8%
Lures and baits (hard, soft, spinner, dough, jig, live bait - not fly fishing)	94.5%
Fishing electronics (GPS, sonar, fish finders)	25.3%

Where do you typically purchase fishing equipment?

Farm/ranch store (Big R, Tractor Supply, etc.)	7.8%
Fishing shows or expos	11.0%
General sporting Goods (Dick's, Academy, etc.)	35.7%
Local bait & tackle shop	52.5%
Mass Merchant (Wal-Mart, Sam's Club)	42.9%
Outdoor Specialty Store (Bass Pro, Cabela's, etc.)	55.6%
Printed catalog (Cabela's, Bass Pro, etc.)	13.9%
Website	32.8%
Other	2.4%

— Media Habits —

Which types of media have you used for fishing related entertainment in the past year?

Websites (blogs, online magazines, etc.)	40.3%
Television	36.4%
State fishing regulation guides	35.7%
Social media	33.4%
Magazines - print	27.4%

What type of fishing related websites do you typically visit?

Online magazines (Field & Stream, Bass Angler, etc.)	45.7%
Forums/chat rooms	23.3%
Websites for manufacturers or retailers	49.7%
State fish & wildlife sites	70.4%
None of the above	5.1%
All of the above	5.6%

Which of the following sources do you find influential when researching fishing information?

Travel & tourism agencies	12.0%
State game & park agency / commission	46.2%
Online forums / blogs	25.8%
Local clubs / organizations	19.2%
Outdoor retailers	26.0%
An endorsement by a general celebrity	1.0%
Outfitters or guides	17.7%
An endorsement by a hunting/fishing/outdoor celebrity	8.0%
Non-profit organizations (i.e. Trout Unlimited, Coastal Conservation Association)	14.4%
A friend / family member	60.9%
TakeMeFishing.org	4.3%
Fishing apps (FishBrain, FishAngler, etc.)	13.2%
Other. Please describe.	1.6%

For details on their use and preference for print, social media and other insights, please refer to the detailed technical report available from www.ASAfishing.org or www.SouthwickAssociates.com.

SOCIAL DABBLER

— 12% of U.S. anglers —

“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.”



— 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.

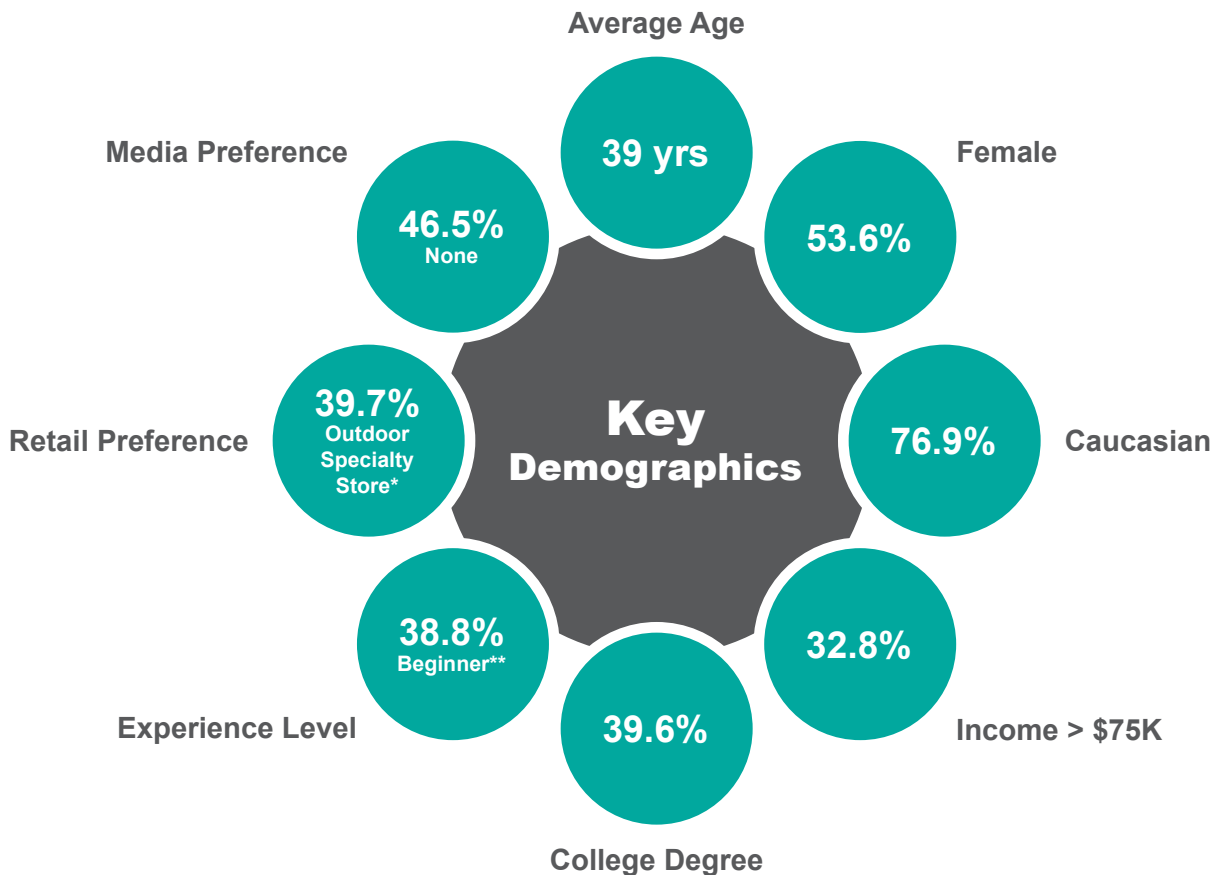
— American Sportfishing Association —

— Topline —

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.

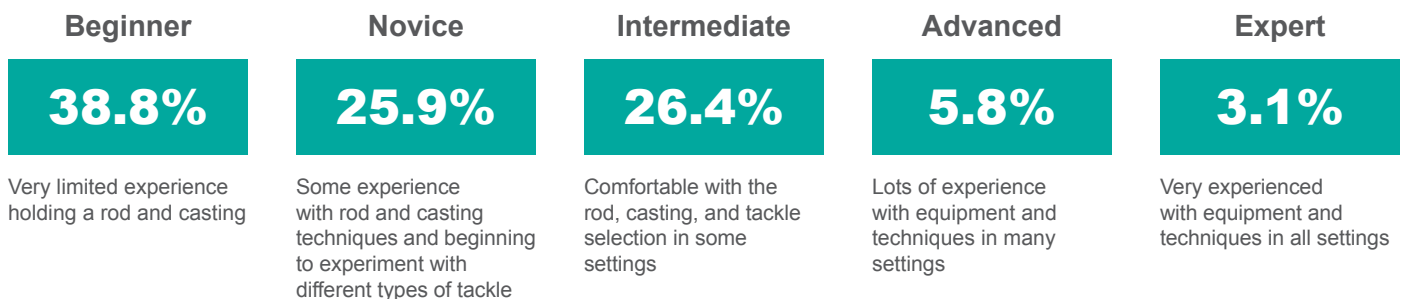
Top 3 Motivations

1. To connect with family or friends
2. To introduce myself/my family to something new
3. To catch fish for food

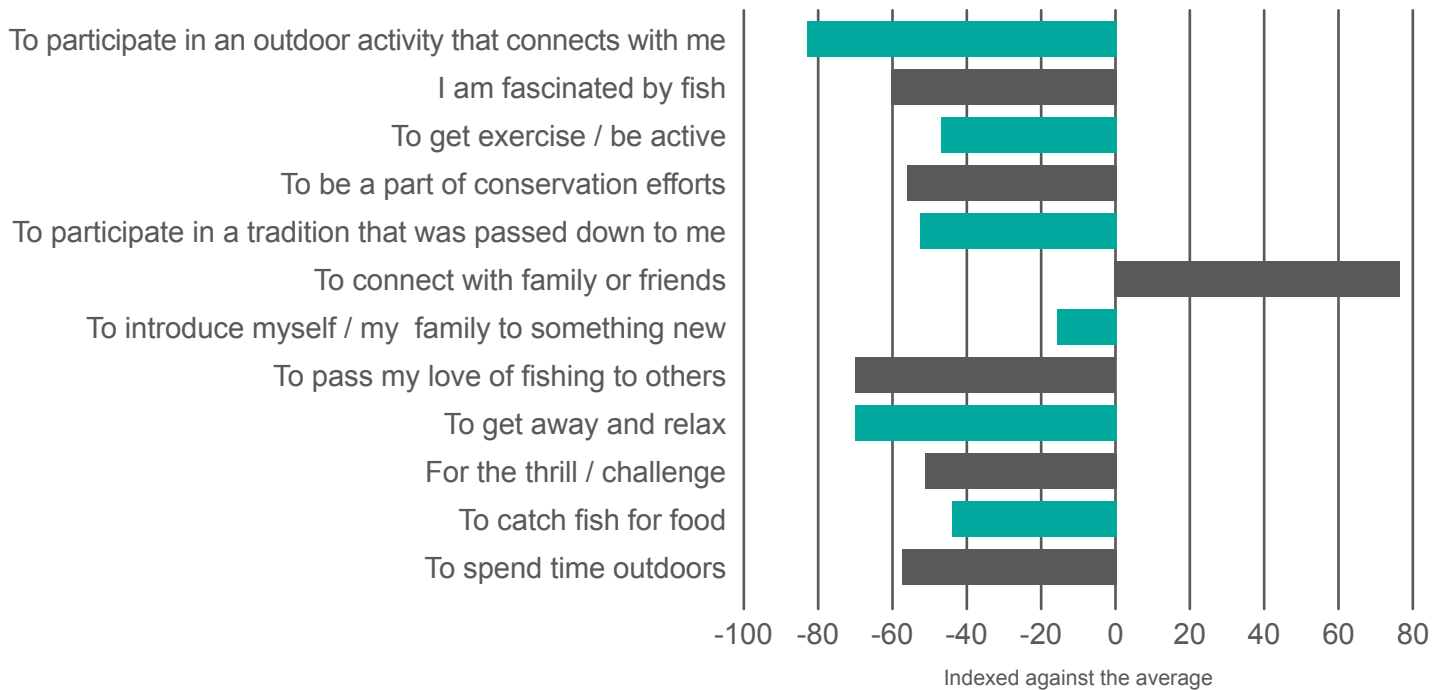


*Bass Pro, Cabela's, etc. **Very limited experience holding a rod and casting

— Experience Level —



— Motivations —



— R3 (Recruitment, Retention, Reactivation) —

Q: How old were you when you began fishing?

A: 12 years old

How did you first become interested in fishing?

I was introduced to fishing by an older family member	66.1%
I was introduced to fishing by a friend	16.1%
Television shows / movies	1.8%
Magazines or online publications	0.4%
Social media	3.3%
Clubs or organizations (i.e. Scouts, school club, summer camp)	2.2%
School (PE program, etc.)	0.9%
My child became interested and asked me about fishing	5.0%
Other	4.2%

Who did you first go fishing with?

A parent or grandparent	50.0%
A family member (other than parent or grandparent)	20.6%
A friend, or family friend	22.6%
A club or organization (i.e. Scouts, summer camp, church group)	1.1%
A coworker	1.1%
School or university	0.3%
My child	2.4%
Nobody / by myself	2.0%

Do you expect to go fishing in the next year?

Yes	68.6%
No	31.4%

Which of the following characteristics make a good fishing experience, as you define it?

Catching lots of fish	6.77
Catching only large fish	2.58
Catching a trophy fish	2.58
Enjoying the outdoors	24.19
Having a relaxing time	22.12
Spending time with friends and family	26.63
Catching the species, I am targeting	6.16
Improving my fishing technique	8.98

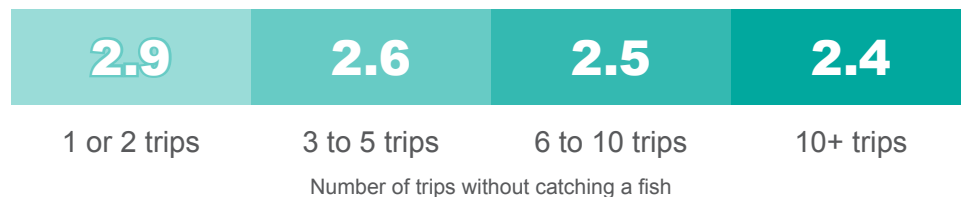
Values reflect a relative rank of each characteristic from most important (higher value) to least important (lower value)

Which factors do you consider most important when selecting a fishing site?

Shorter travel distance / close to home	19.6%
Abundance of fish	24.3%
New site / going somewhere different	3.1%
Water quality/conditions	16.2%
Diversity of fish species	8.6%
Opportunity to catch big fish	12.5%
The scenic beauty	20.0%
Regular fish stocking	6.1%
People on-site to help	8.4%
Education programs offered	1.2%
Lack of crowds	30.0%
Learning of positive fishing information (i.e. a tip about a hotspot from a friend, coworker)	6.1%
No access fees	16.0%
Other activities nearby (playground)	6.3%
Familiar site / I already have access or permission	31.3%
Easy to access	34.3%
Amenities (public bathrooms, picnic tables, parking lot, etc.)	16.3%
Safety	17.8%

Considering your next fishing outing, how would your plans be affected if you didn't catch any fish on your past trips?

The following figure 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.



What other activities or hobbies typically compete against fishing for your time?

My child's activities (sports, etc.)	19.0%
Other clubs, organizations, groups in which I participate (i.e. church groups, sports leagues)	17.9%
Other outdoor recreation activities	29.9%
Family obligations	64.1%
Work obligations	44.8%
School	18.2%
Relaxing at home (television, reading, etc.)	50.8%
Other. Please describe	6.1%

Which of the following reasons has prevented you from fishing at least once in the past year?

Did not have anybody to go with	20.8%
I was not sure where to go	10.9%
Did not have enough money	8.4%
I was not successful, so I did not go again	5.7%
Fishing regulations have gotten too restrictive	11.2%
Health issues	13.5%
Weather	34.1%
Did not have the right equipment	16.0%
Other. Please describe.	8.5%
None of the above – I have not been prevented from fishing at all in the last year	16.9%

Even if you are an avid angler, which of the following might encourage you to fish more often?

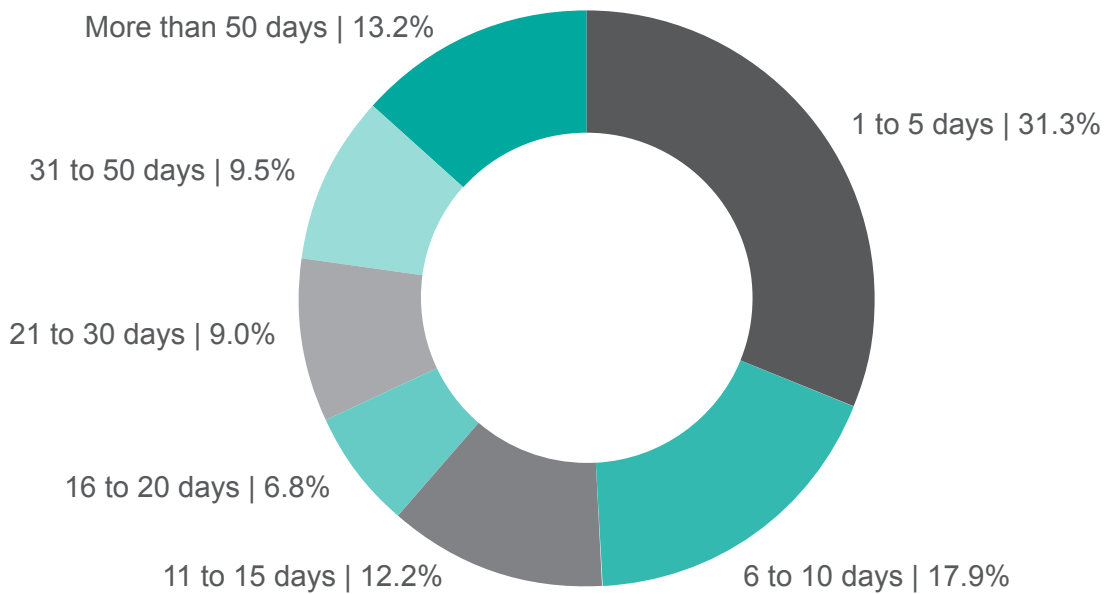
An invitation from a friend or family member to go fish	58.7%
Fishing instruction to improve my knowledge / methods / technique	15.9%
Access to rental or loaner fishing equipment	13.6%
Information and insights from local fishing experts	12.1%
A special beginner event for first-time anglers only	10.7%
Stories about fishing in local online media (blogs, social media, websites)	8.3%
Stories about fishing in local print media	2.5%
Other. Please describe.	2.2%
None of the above	17.3%

— Fishing Activity —

How recently have you been fishing?

Within the past year	31.8%
1 to 3 years ago	20.7%
4 or 5 years ago	12.7%
6 to 10 years ago	12.1%
11 to 20 years ago	12.8%
More than 20 years ago	9.9%

How many days did you fish in the past year?



Percentage of time for types of fishing expected within the next year, or during a typical year?

Freshwater	59.9%
Saltwater	31.3%
Brackish	8.9%

Percentage of time for types of fishing techniques in the next year, or in a typical year?

Fishing with live bait	46.4%
Fishing with artificial bait or lures	43.8%
Fly fishing	9.8%

Which freshwater species do you typically target?

Bass (largemouth, smallmouth, white, sunshine, hybrid, etc.)	63.3%
Carp	10.1%
Catfish	37.8%
Perch or Panfish (crappie, sunfish, bluegill/bream)	33.5%
Pickerel, pike, or muskie	7.5%
Salmon	10.7%
Saugeye	2.1%
Steelhead	3.0%
Sturgeon	1.9%
Trout	33.5%
Walleye	13.6%
Other freshwater species	11.9%

Which saltwater species do you typically target?

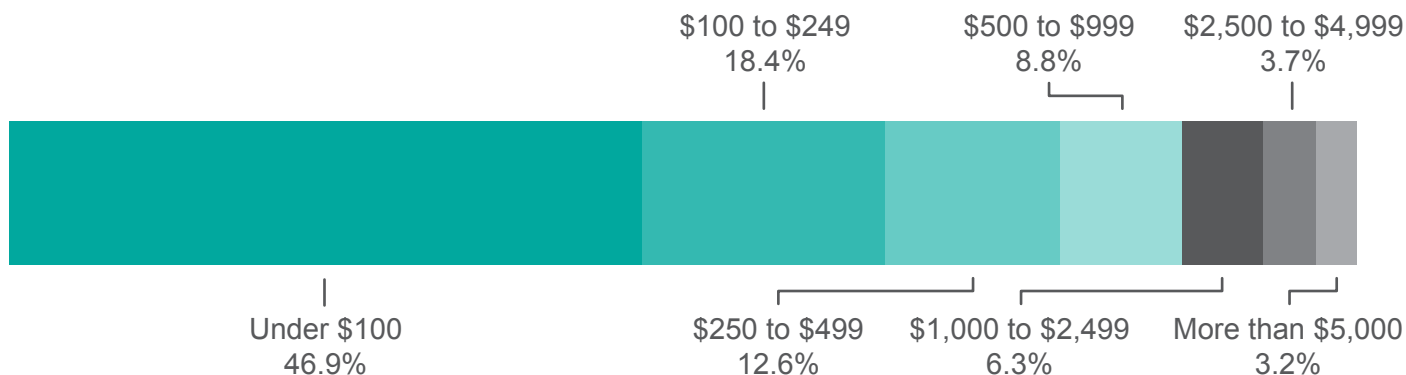
Amberjack	4.7%
Black Drum	7.8%
Bluefish	17.9%
Cod (all species)	19.1%
Flounder	33.8%
Grouper, snapper, sea bass	23.7%
Halibut	11.2%
Mackerel (king, Spanish, Boston, cero, etc.)	12.5%
Permit	1.1%
Redfish, red drum	14.9%
Rockfish (Pacific coast only)	6.1%
Scup	1.5%
Shark	5.9%
Snook	7.1%
Speckled Trout	17.5%
Spotted seatrout or weakfish	6.2%
Striped bass	24.3%
Tarpon	6.3%
Yellow tail	12.7%
Other saltwater species	14.4%

— Spending —

Have you purchased any fishing related items in the past year?

Yes	33.5%
No	66.5%

How much have you spent on fishing equipment within the past year?



Which of the following items have you purchased within the past year?

Reel	35.1%
Rod	60.0%
Combo (rod/reel)	15.8%
Fishing Line	57.7%
Lures and baits (hard, soft, spinner, dough, jig, live bait - not fly fishing)	66.8%
Fishing electronics (GPS, sonar, fish finders)	17.3%

Where do you typically purchase fishing equipment?

Farm/ranch store (Big R, Tractor Supply, etc.)	17.1%
Fishing shows or expos	13.3%
General sporting Goods (Dick's, Academy, etc.)	32.8%
Local bait & tackle shop	17.0%
Mass Merchant (Wal-Mart, Sam's Club)	30.7%
Outdoor Specialty Store (Bass Pro, Cabela's, etc.)	39.7%
Printed catalog (Cabela's, Bass Pro, etc.)	13.9%
Website	28.8%
Other	3.8%

— Media Habits —

Which types of media have you used for fishing related entertainment in the past year?

None	46.5%
Television	24.0%
Social media	22.1%
Websites (blogs, online magazines, etc.)	20.9%
State fishing regulation guides	20.0%

What type of fishing related websites do you typically visit?

Online magazines (Field & Stream, Bass Angler, etc.)	51.3%
Forums/chat rooms	23.8%
Websites for manufacturers or retailers	60.4%
State fish & wildlife sites	68.5%
None of the above	5.1%
All of the above	10.8%

Which of the following sources do you find influential when researching fishing information?

Travel & tourism agencies	15.7%
State game & park agency / commission	27.6%
Online forums / blogs	30.1%
Local clubs / organizations	14.4%
Outdoor retailers	21.0%
An endorsement by a general celebrity	4.7%
Outfitters or guides	30.2%
An endorsement by a hunting/fishing/outdoor celebrity	10.2%
Non-profit organizations (i.e. Trout Unlimited, Coastal Conservation Association)	12.4%
A friend / family member	64.3%
TakeMeFishing.org	13.1%
Fishing apps (FishBrain, FishAngler, etc.)	15.6%
Other. Please describe.	0.9%

For details on their use and preference for print, social media and other insights, please refer to the detailed technical report available from www.ASAfishing.org or www.SouthwickAssociates.com.

ADVENTUROUS ANGLER

— 18% of U.S. anglers —

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



— 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.

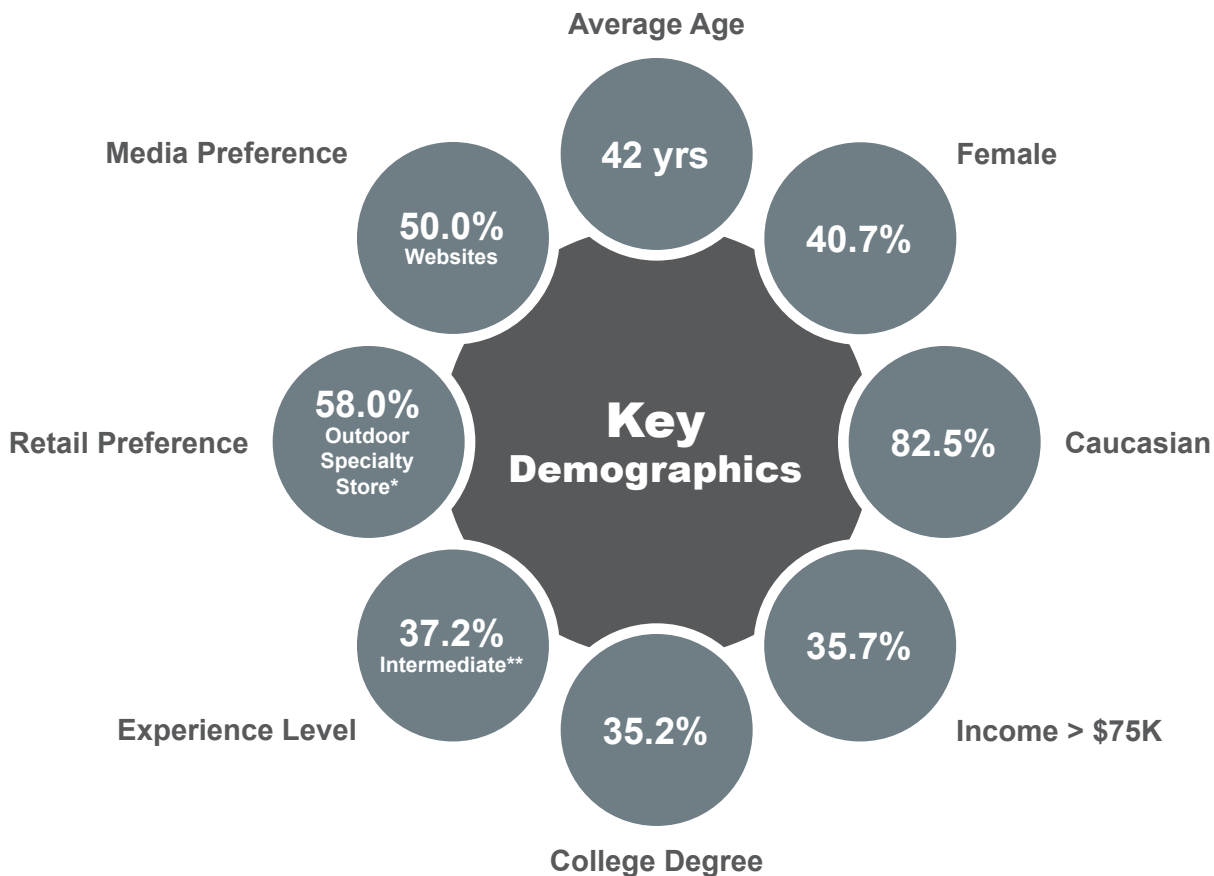
— American Sportfishing Association —

— Topline —

Adventurous Anglers are primarily motivated to fish for the thrill, challenge and to be active outdoors. Fascinated by fish, they personally connect with fishing as an activity, wanting to learn more about species habits to boost their fishing success. These anglers make up the second largest (17.6%) persona of anglers. This group is more likely than most to fish from powered and non-powered vessels, such as canoes or kayaks. They consider themselves to be somewhat experienced anglers. 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%).

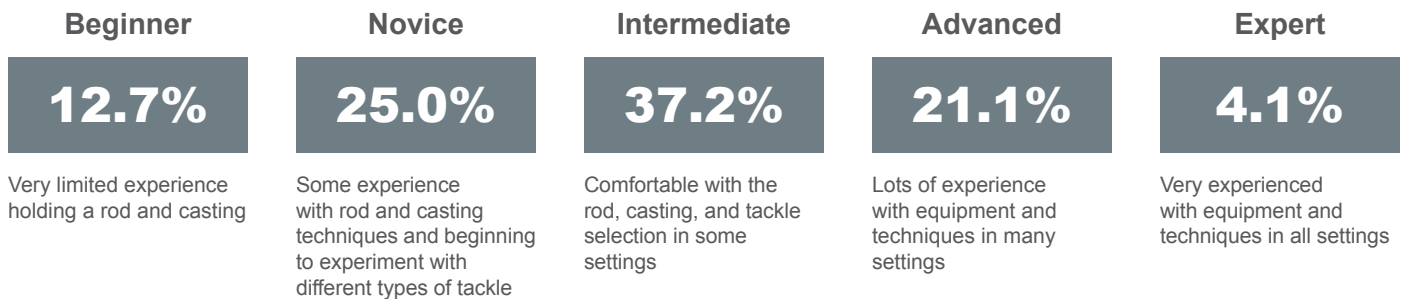
Top 3 Motivations

1. For the thrill/challenge
2. I want an outdoor activity that connects with me
3. I am fascinated by fish

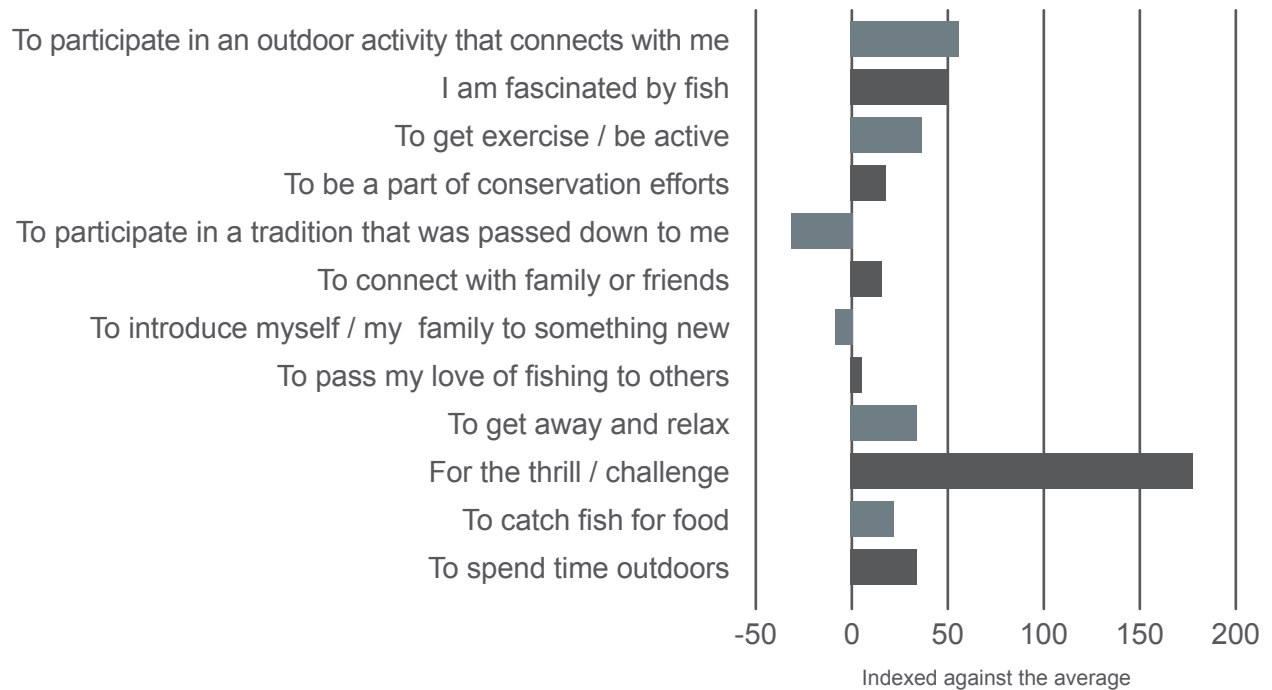


*Bass Pro, Cabela's, etc. **Comfortable w/ the rod, casting, & tackle selection in some settings

— Experience Level —



— Motivations —



— R3 (Recruitment, Retention, Reactivation) —

Q: How old were you when you began fishing?

A: 10 years old

How did you first become interested in fishing?

I was introduced to fishing by an older family member	69.9%
I was introduced to fishing by a friend	16.3%
Television shows / movies	3.3%
Magazines or online publications	0.9%
Social media	0.9%
Clubs or organizations (i.e. Scouts, school club, summer camp)	2.2%
School (PE program, etc.)	0.6%
My child became interested and asked me about fishing	1.4%
Other	4.5%

Who did you first go fishing with?

A parent or grandparent	56.6%
A family member (other than parent or grandparent)	17.4%
A friend, or family friend	18.6%
A club or organization (i.e. Scouts, summer camp, church group)	2.2%
A coworker	0.9%
School or university	0.8%
My child	0.6%
Nobody / by myself	3.0%

Do you expect to go fishing in the next year?

Yes	94.1%
No	5.9%

Which of the following characteristics make a good fishing experience, as you define it?

Catching lots of fish	9.15
Catching only large fish	3.51
Catching a trophy fish	4.74
Enjoying the outdoors	21.39
Having a relaxing time	18.93
Spending time with friends and family	21.62
Catching the species, I am targeting	9.48
Improving my fishing technique	11.19

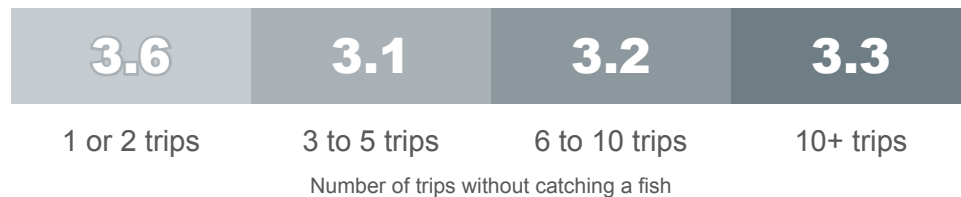
Values reflect a relative rank of each characteristic from most important (higher value) to least important (lower value)

Which factors do you consider most important when selecting a fishing site?

Shorter travel distance / close to home	21.5%
Abundance of fish	32.7%
New site / going somewhere different	18.0%
Water quality/conditions	23.2%
Diversity of fish species	11.7%
Opportunity to catch big fish	35.1%
The scenic beauty	16.8%
Regular fish stocking	6.1%
People on-site to help	3.0%
Education programs offered	0.4%
Lack of crowds	29.6%
Learning of positive fishing information (i.e. a tip about a hotspot from a friend, coworker)	10.3%
No access fees	14.9%
Other activities nearby (playground)	3.1%
Familiar site / I already have access or permission	15.6%
Easy to access	26.6%
Amenities (public bathrooms, picnic tables, parking lot, etc.)	7.4%
Safety	13.8%

Considering your next fishing outing, how would your plans be affected if you didn't catch any fish on your past trips?

The following figure 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.



What other activities or hobbies typically compete against fishing for your time?

My child's activities (sports, etc.)	18.4%
Other clubs, organizations, groups in which I participate (i.e. church groups, sports leagues)	15.9%
Other outdoor recreation activities	33.9%
Family obligations	60.6%
Work obligations	57.0%
School	9.8%
Relaxing at home (television, reading, etc.)	42.9%
Other. Please describe	7.2%

Which of the following reasons has prevented you from fishing at least once in the past year?

Did not have anybody to go with	26.6%
I was not sure where to go	16.2%
Did not have enough money	21.0%
I was not successful, so I did not go again	2.9%
Fishing regulations have gotten too restrictive	6.3%
Health issues	11.6%
Weather	48.1%
Did not have the right equipment	14.5%
Other. Please describe.	9.7%
None of the above – I have not been prevented from fishing at all in the last year	18.5%

Even if you are an avid angler, which of the following might encourage you to fish more often?

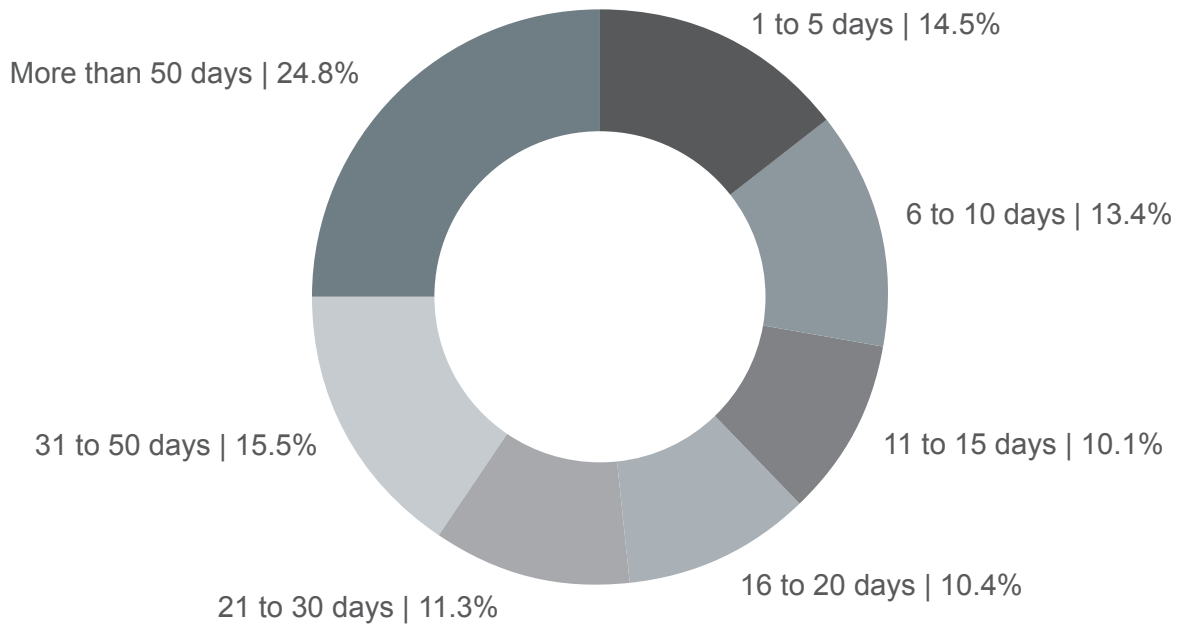
An invitation from a friend or family member to go fish	77.5%
Fishing instruction to improve my knowledge / methods / technique	41.5%
Access to rental or loaner fishing equipment	19.8%
Information and insights from local fishing experts	34.7%
A special beginner event for first-time anglers only	12.5%
Stories about fishing in local online media (blogs, social media, websites)	15.8%
Stories about fishing in local print media	10.0%
Other. Please describe.	6.9%
None of the above	6.9%

— Fishing Activity —

How recently have you been fishing?

Within the past year	67.7%
1 to 3 years ago	14.0%
4 or 5 years ago	6.0%
6 to 10 years ago	5.9%
11 to 20 years ago	3.8%
More than 20 years ago	2.7%

How many days did you fish in the past year?



Percentage of time for types of fishing expected within the next year, or during a typical year?

Freshwater	67.7%
Saltwater	25.7%
Brackish	6.6%

Percentage of time for types of fishing techniques in the next year, or in a typical year?

Fishing with live bait	39.3%
Fishing with artificial bait or lures	51.5%
Fly fishing	9.2%

Which freshwater species do you typically target?

Bass (largemouth, smallmouth, white, sunshine, hybrid, etc.)	80.0%
Carp	9.9%
Catfish	36.5%
Perch or Panfish (crappie, sunfish, bluegill/bream)	46.4%
Pickerel, pike, or muskie	15.7%
Salmon	12.7%
Saugeye	3.5%
Steelhead	5.2%
Sturgeon	1.8%
Trout	40.3%
Walleye	24.1%
Other freshwater species	10.7%

Which saltwater species do you typically target?

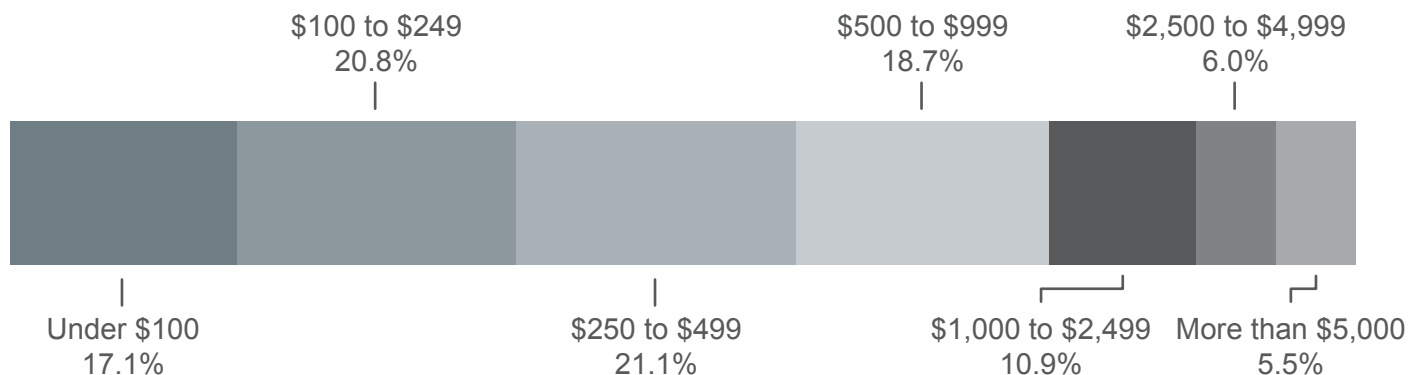
Amberjack	6.3%
Black Drum	10.9%
Bluefish	24.8%
Cod (all species)	24.2%
Flounder	42.7%
Grouper, snapper, sea bass	31.4%
Halibut	13.7%
Mackerel (king, Spanish, Boston, cero, etc.)	12.8%
Permit	3.5%
Redfish, red drum	28.1%
Rockfish (Pacific coast only)	6.6%
Scup	3.0%
Shark	7.8%
Snook	11.4%
Speckled Trout	26.9%
Spotted seatrout or weakfish	9.3%
Striped bass	35.7%
Tarpon	6.5%
Yellow tail	13.8%
Other saltwater species	15.0%

— Spending —

Have you purchased any fishing related items in the past year?

Yes	68.8%
No	31.2%

How much have you spent on fishing equipment within the past year?



Which of the following items have you purchased within the past year?

Reel	56.3%
Rod	57.2%
Combo (rod/reel)	31.9%
Fishing Line	81.9%
Lures and baits (hard, soft, spinner, dough, jig, live bait - not fly fishing)	90.5%
Fishing electronics (GPS, sonar, fish finders)	24.7%

Where do you typically purchase fishing equipment?

Farm/ranch store (Big R, Tractor Supply, etc.)	7.7%
Fishing shows or expos	9.7%
General sporting Goods (Dick's, Academy, etc.)	39.5%
Local bait & tackle shop	49.1%
Mass Merchant (Wal-Mart, Sam's Club)	33.7%
Outdoor Specialty Store (Bass Pro, Cabela's, etc.)	58.0%
Printed catalog (Cabela's, Bass Pro, etc.)	9.6%
Website	38.4%
Other	4.0%

— Media Habits —

Which types of media have you used for fishing related entertainment in the past year?

Websites (blogs, online magazines, etc.)	50.0%
Television	49.7%
Social media	43.5%
State fishing regulation guides	39.8%
Magazines - print	36.5%

What type of fishing related websites do you typically visit?

Online magazines (Field & Stream, Bass Angler, etc.)	59.3%
Forums/chat rooms	38.6%
Websites for manufacturers or retailers	69.5%
State fish & wildlife sites	59.8%
None of the above	1.7%
All of the above	11.2%

Which of the following sources do you find influential when researching fishing information?

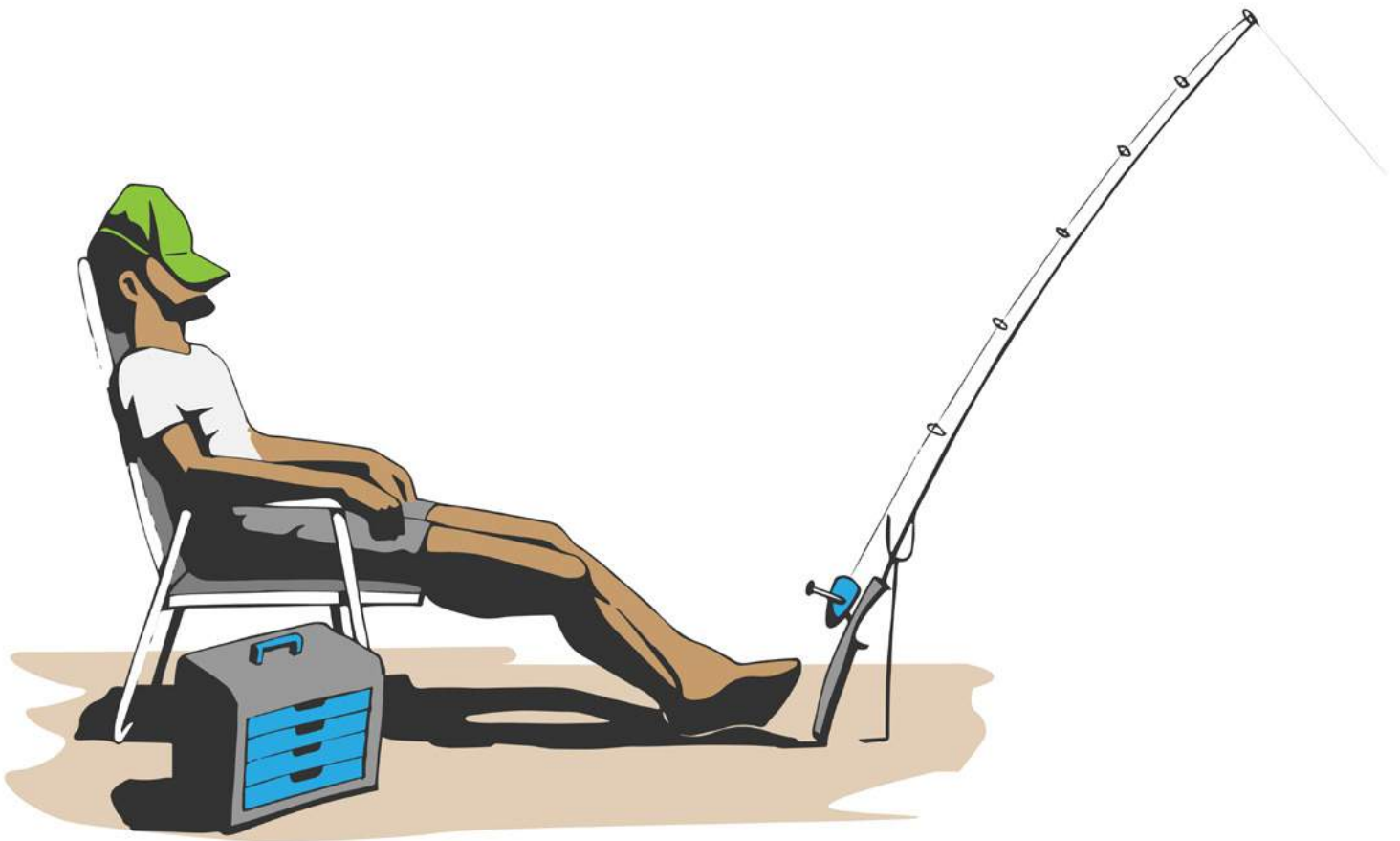
Travel & tourism agencies	9.5%
State game & park agency / commission	38.3%
Online forums / blogs	24.7%
Local clubs / organizations	27.6%
Outdoor retailers	36.6%
An endorsement by a general celebrity	5.1%
Outfitters or guides	20.1%
An endorsement by a hunting/fishing/outdoor celebrity	17.2%
Non-profit organizations (i.e. Trout Unlimited, Coastal Conservation Association)	12.5%
A friend / family member	65.8%
TakeMeFishing.org	7.8%
Fishing apps (FishBrain, FishAngler, etc.)	23.8%
Other. Please describe.	1.7%

For details on their use and preference for print, social media and other insights, please refer to the detailed technical report available from www.ASAfishing.org or www.SouthwickAssociates.com.

ZEN ANGLER

— 18% of U.S. anglers —

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



— 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.

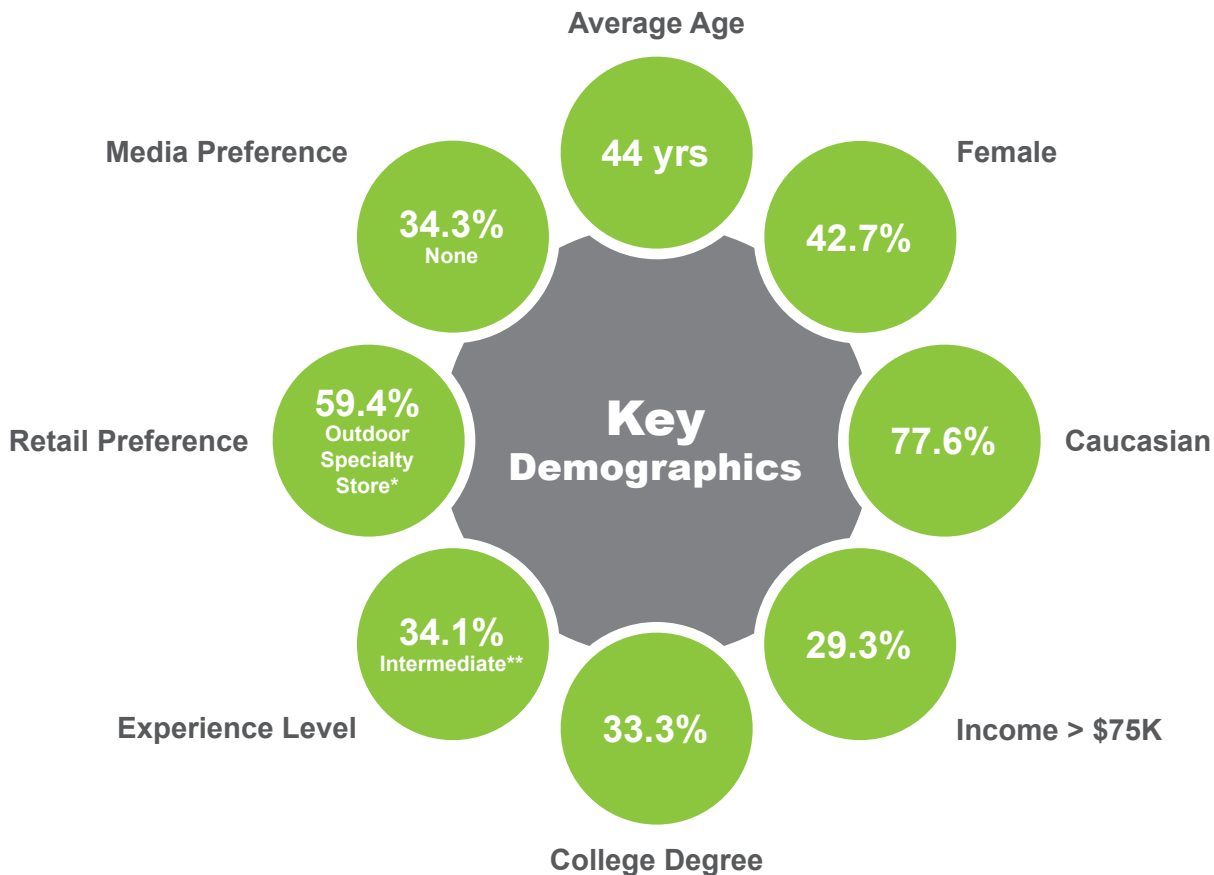
— American Sportfishing Association —

— Topline —

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?"

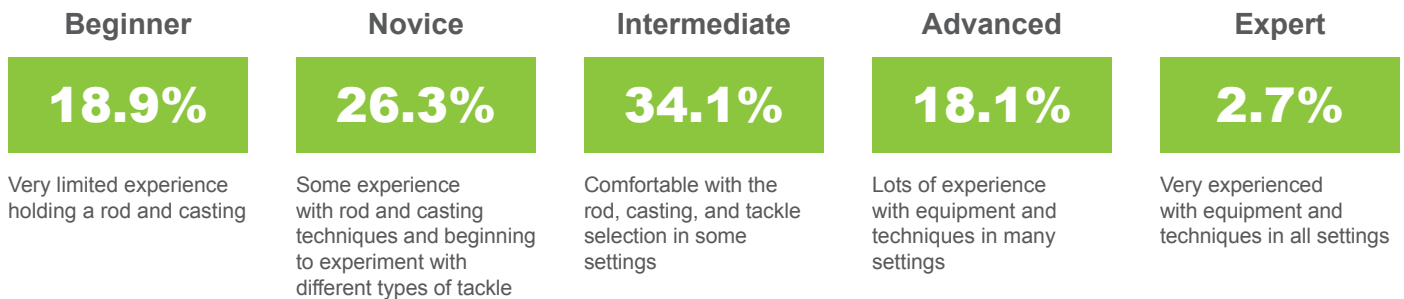
Top 3 Motivations

1. To get away and relax
2. To spend times outdoors
3. I am fascinated by fish

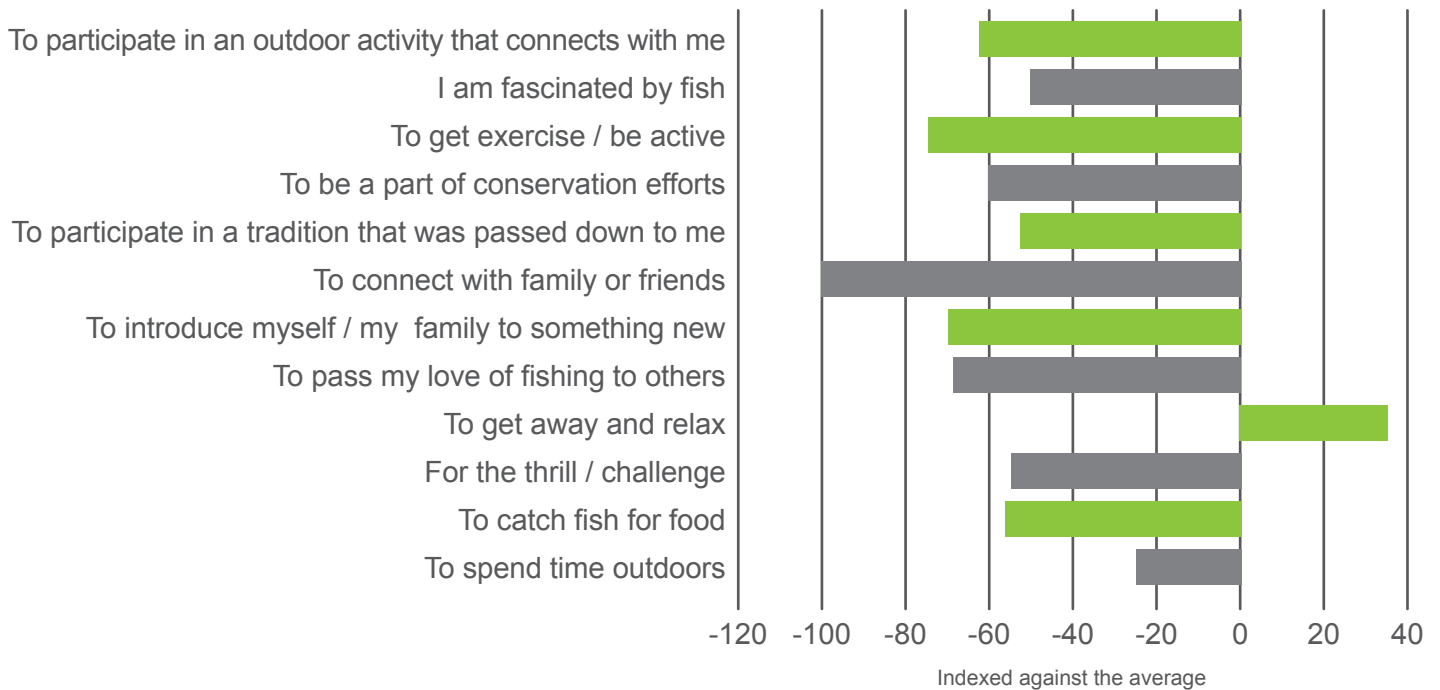


*Bass Pro, Cabela's, etc. **Comfortable w/ the rod, casting, & tackle selection in some settings

— Experience Level —



— Motivations —



— R3 (Recruitment, Retention, Reactivation) —

Q: How old were you when you began fishing?

A: 10 years old

How did you first become interested in fishing?

I was introduced to fishing by an older family member	69.7%
I was introduced to fishing by a friend	16.6%
Television shows / movies	2.0%
Magazines or online publications	1.0%
Social media	1.5%
Clubs or organizations (i.e. Scouts, school club, summer camp)	2.0%
School (PE program, etc.)	0.8%
My child became interested and asked me about fishing	2.2%
Other	4.2%

Who did you first go fishing with?

A parent or grandparent	53.0%
A family member (other than parent or grandparent)	21.6%
A friend, or family friend	18.0%
A club or organization (i.e. Scouts, summer camp, church group)	1.9%
A coworker	0.8%
School or university	0.6%
My child	1.9%
Nobody / by myself	2.0%

Do you expect to go fishing in the next year?

Yes	78.1%
No	21.9%

Which of the following characteristics make a good fishing experience, as you define it?

Catching lots of fish	6.17
Catching only large fish	1.76
Catching a trophy fish	2.08
Enjoying the outdoors	25.19
Having a relaxing time	24.09
Spending time with friends and family	25.11
Catching the species, I am targeting	6.37
Improving my fishing technique	9.24

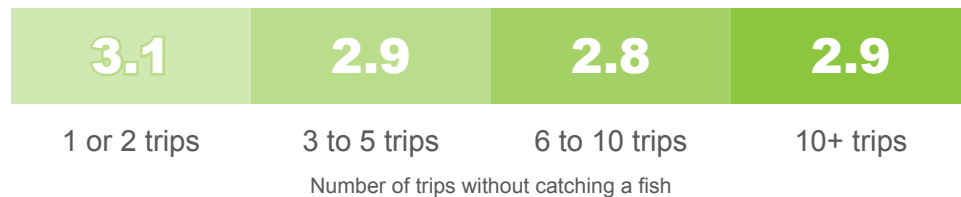
Values reflect a relative rank of each characteristic from most important (higher value) to least important (lower value)

Which factors do you consider most important when selecting a fishing site?

Shorter travel distance / close to home	17.5%
Abundance of fish	21.6%
New site / going somewhere different	9.2%
Water quality/conditions	26.7%
Diversity of fish species	10.0%
Opportunity to catch big fish	20.9%
The scenic beauty	26.5%
Regular fish stocking	4.5%
People on-site to help	3.3%
Education programs offered	0.0%
Lack of crowds	34.3%
Learning of positive fishing information (i.e. a tip about a hotspot from a friend, coworker)	4.3%
No access fees	18.1%
Other activities nearby (playground)	2.4%
Familiar site / I already have access or permission	17.8%
Easy to access	28.0%
Amenities (public bathrooms, picnic tables, parking lot, etc.)	14.0%
Safety	15.4%

Considering your next fishing outing, how would your plans be affected if you didn't catch any fish on your past trips?

The following figure 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.



What other activities or hobbies typically compete against fishing for your time?

My child's activities (sports, etc.)	15.3%
Other clubs, organizations, groups in which I participate (i.e. church groups, sports leagues)	14.9%
Other outdoor recreation activities	31.4%
Family obligations	51.5%
Work obligations	43.2%
School	6.6%
Relaxing at home (television, reading, etc.)	51.1%
Other. Please describe	6.5%

Which of the following reasons has prevented you from fishing at least once in the past year?

Did not have anybody to go with	21.7%
I was not sure where to go	9.5%
Did not have enough money	14.9%
I was not successful, so I did not go again	3.2%
Fishing regulations have gotten too restrictive	3.4%
Health issues	15.3%
Weather	33.8%
Did not have the right equipment	15.0%
Other. Please describe.	5.3%
None of the above – I have not been prevented from fishing at all in the last year	20.6%

Even if you are an avid angler, which of the following might encourage you to fish more often?

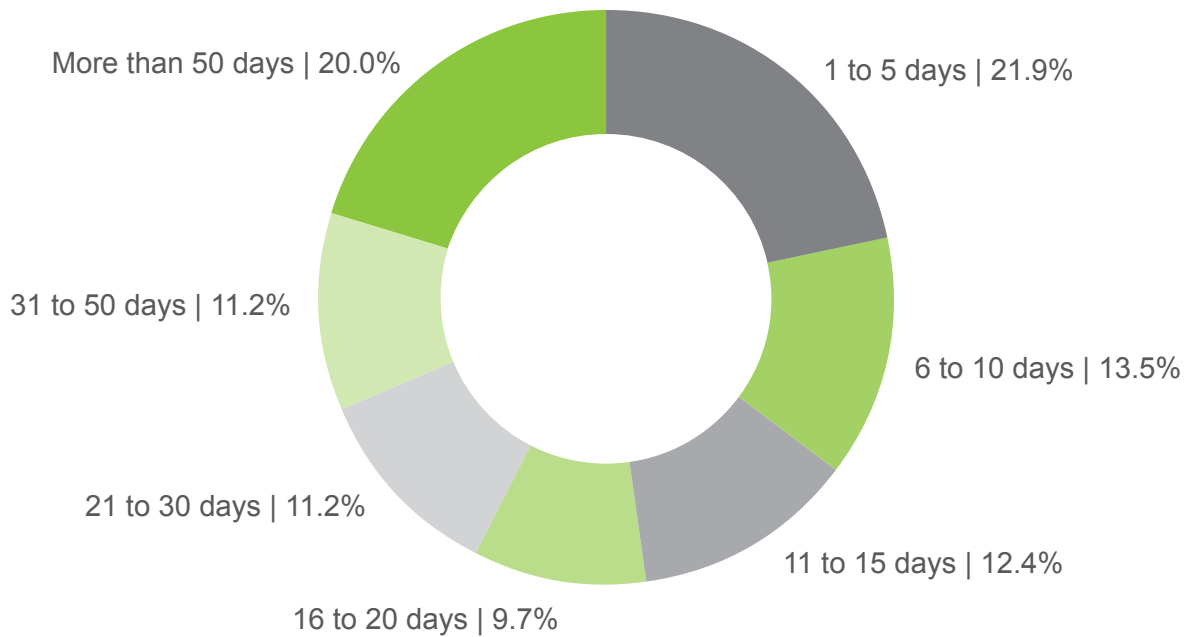
An invitation from a friend or family member to go fish	66.7%
Fishing instruction to improve my knowledge / methods / technique	16.8%
Access to rental or loaner fishing equipment	13.6%
Information and insights from local fishing experts	15.1%
A special beginner event for first-time anglers only	8.6%
Stories about fishing in local online media (blogs, social media, websites)	8.1%
Stories about fishing in local print media	6.9%
Other. Please describe.	2.2%
None of the above	15.1%

— Fishing Activity —

How recently have you been fishing?

Within the past year	44.4%
1 to 3 years ago	16.2%
4 or 5 years ago	8.3%
6 to 10 years ago	11.4%
11 to 20 years ago	10.9%
More than 20 years ago	8.8%

How many days did you fish in the past year?



Percentage of time for types of fishing expected within the next year, or during a typical year?

Freshwater	64.8%
Saltwater	26.5%
Brackish	8.6%

Percentage of time for types of fishing techniques in the next year, or in a typical year?

Fishing with live bait	43.3%
Fishing with artificial bait or lures	46.6%
Fly fishing	10.2%

Which freshwater species do you typically target?

Bass (largemouth, smallmouth, white, sunshine, hybrid, etc.)	66.9%
Carp	11.7%
Catfish	38.5%
Perch or Panfish (crappie, sunfish, bluegill/bream)	36.5%
Pickerel, pike, or muskie	9.9%
Salmon	13.0%
Saugeye	2.7%
Steelhead	3.9%
Sturgeon	1.6%
Trout	35.6%
Walleye	16.3%
Other freshwater species	7.9%

Which saltwater species do you typically target?

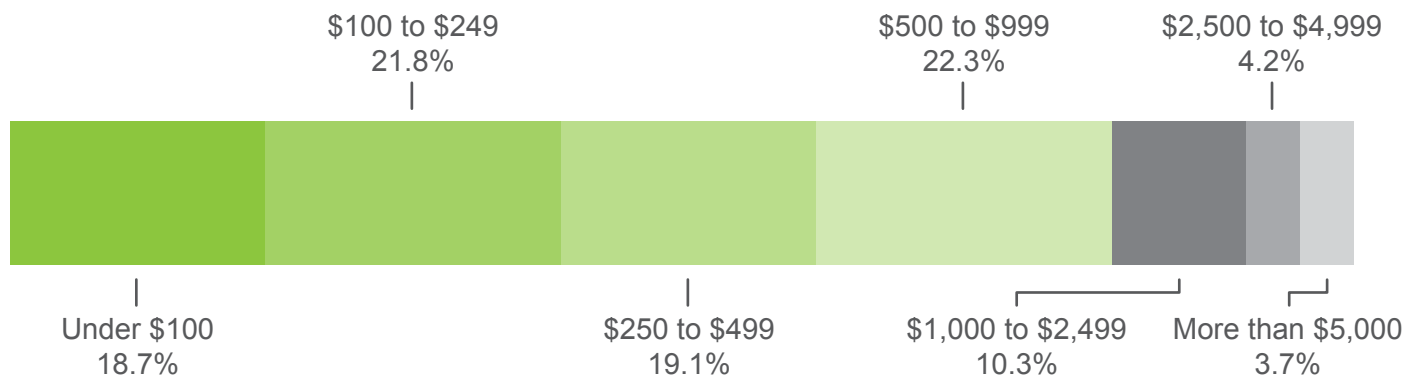
Amberjack	4.5%
Black Drum	10.6%
Bluefish	23.1%
Cod (all species)	22.2%
Flounder	39.8%
Grouper, snapper, sea bass	20.7%
Halibut	12.8%
Mackerel (king, Spanish, Boston, cero, etc.)	9.8%
Permit	3.5%
Redfish, red drum	24.3%
Rockfish (Pacific coast only)	5.8%
Scup	2.2%
Shark	8.5%
Snook	10.9%
Speckled Trout	15.5%
Spotted seatrout or weakfish	9.5%
Striped bass	29.9%
Tarpon	9.6%
Yellow tail	13.9%
Other saltwater species	14.4%

— Spending —

Have you purchased any fishing related items in the past year?

Yes	48.2%
No	51.8%

How much have you spent on fishing equipment within the past year?



Which of the following items have you purchased within the past year?

Reel	48.8%
Rod	51.8%
Combo (rod/reel)	30.2%
Fishing Line	77.2%
Lures and baits (hard, soft, spinner, dough, jig, live bait - not fly fishing)	84.1%
Fishing electronics (GPS, sonar, fish finders)	26.4%

Where do you typically purchase fishing equipment?

Farm/ranch store (Big R, Tractor Supply, etc.)	11.4%
Fishing shows or expos	17.2%
General sporting Goods (Dick's, Academy, etc.)	33.1%
Local bait & tackle shop	39.3%
Mass Merchant (Wal-Mart, Sam's Club)	26.5%
Outdoor Specialty Store (Bass Pro, Cabela's, etc.)	59.4%
Printed catalog (Cabela's, Bass Pro, etc.)	15.9%
Website	34.3%
Other	0.8%

— Media Habits —

Which types of media have you used for fishing related entertainment in the past year?

None	34.3%
Television	33.2%
Magazines - print	29.1%
Websites (blogs, online magazines, etc.)	24.7%
Social media	22.9%

What type of fishing related websites do you typically visit?

Online magazines (Field & Stream, Bass Angler, etc.)	66.8%
Forums/chat rooms	38.1%
Websites for manufacturers or retailers	64.9%
State fish & wildlife sites	56.2%
None of the above	1.1%
All of the above	7.0%

Which of the following sources do you find influential when researching fishing information?

Travel & tourism agencies	6.1%
State game & park agency / commission	19.5%
Online forums / blogs	25.3%
Local clubs / organizations	18.5%
Outdoor retailers	22.4%
An endorsement by a general celebrity	6.9%
Outfitters or guides	15.3%
An endorsement by a hunting/fishing/outdoor celebrity	9.5%
Non-profit organizations (i.e. Trout Unlimited, Coastal Conservation Association)	16.3%
A friend / family member	48.5%
TakeMeFishing.org	7.1%
Fishing apps (FishBrain, FishAngler, etc.)	22.7%
Other. Please describe.	0.7%

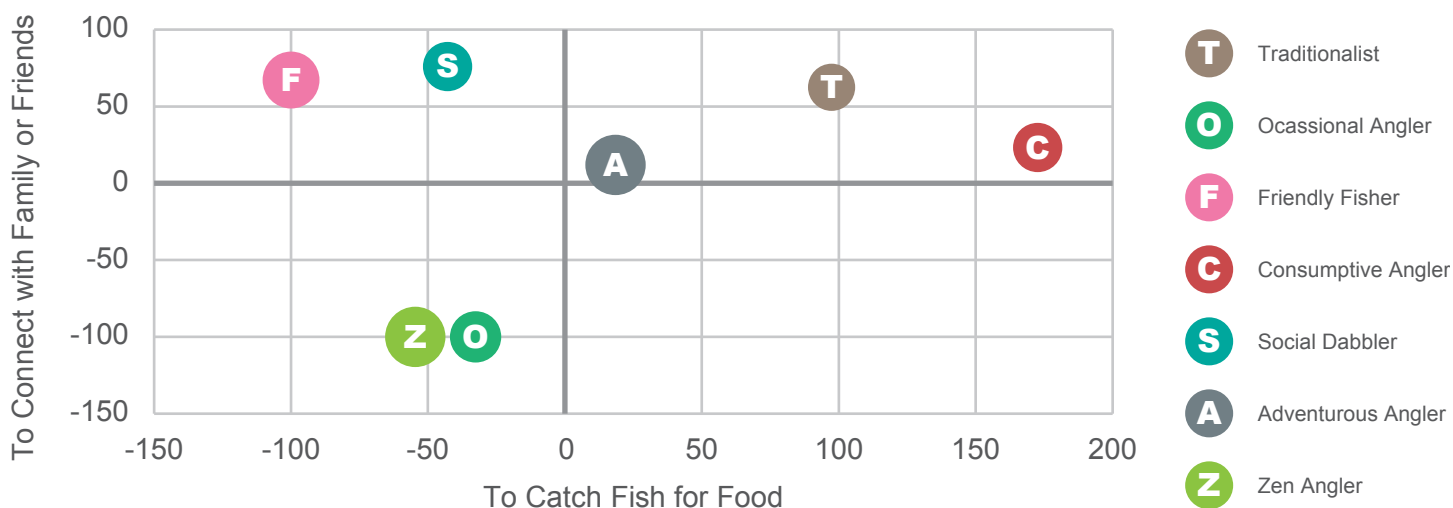
For details on their use and preference for print, social media and other insights, please refer to the detailed technical report available from www.ASAfishing.org or www.SouthwickAssociates.com.

PLAYING FIELDS

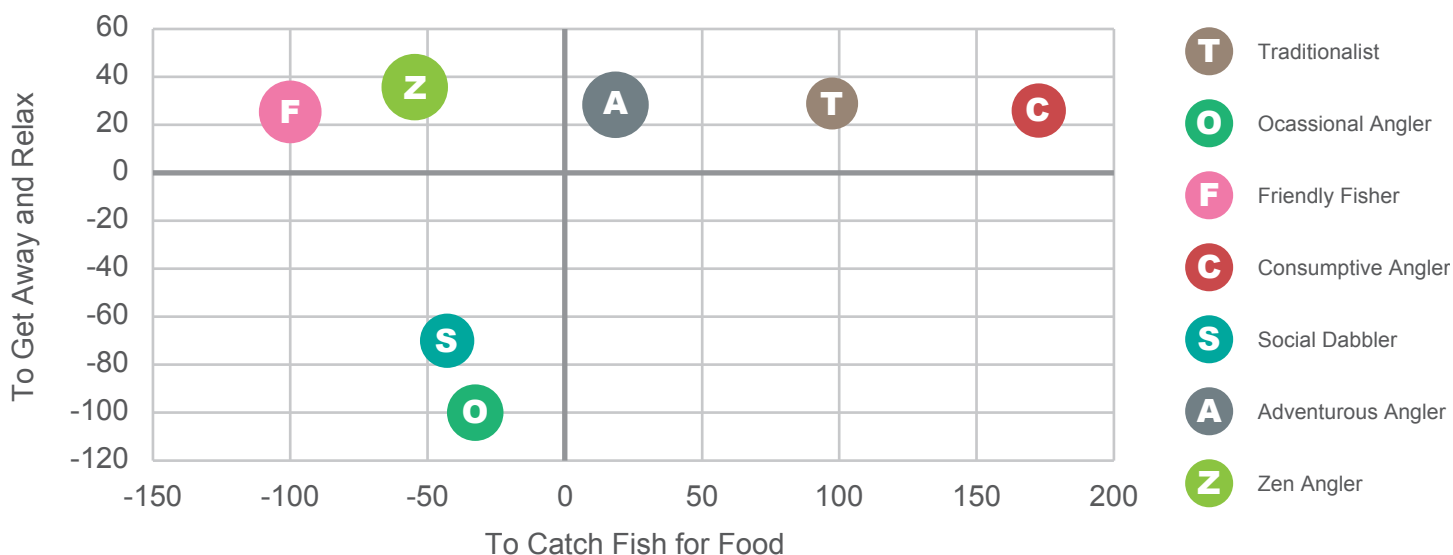
Playing fields are a visual way to compare the personas, based on their key motivations and other characteristics, thereby highlighting their differences and helping to identify the persona(s) that best fit a specific product or goal. These personas then become one's target audience.

Only four of the many possible playing fields are presented here. Each circle represents a persona and the locations of the circles reflect a relative value in relation to the Average Angler. For example, using the 'Catching Fish For Food & Connecting With Family Or Friends' playing field, the Adventurous Angler (A), Traditionalist (T), and Consumptive Angler (C) personas are all more likely to catch fish for food, relative to the 'Average Angler' (represented by the vertical gray bar). Similarly, the Zen Angler (Z) and the Occasional Angler (O) are less likely to go fishing to connect with family and friends, relative to the 'Average Angler' (represented by the horizontal gray bar).

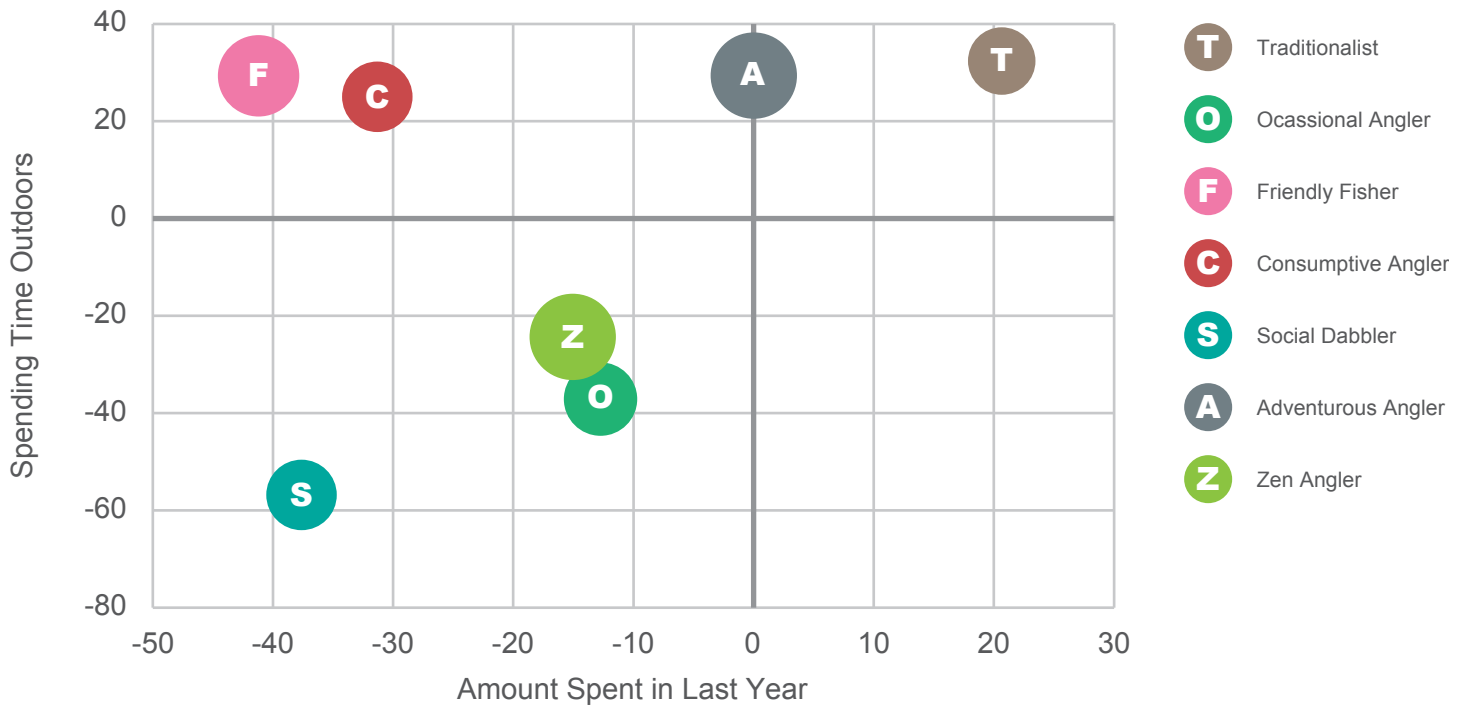
— Catching Fish For Food & Connecting With Family Or Friends —



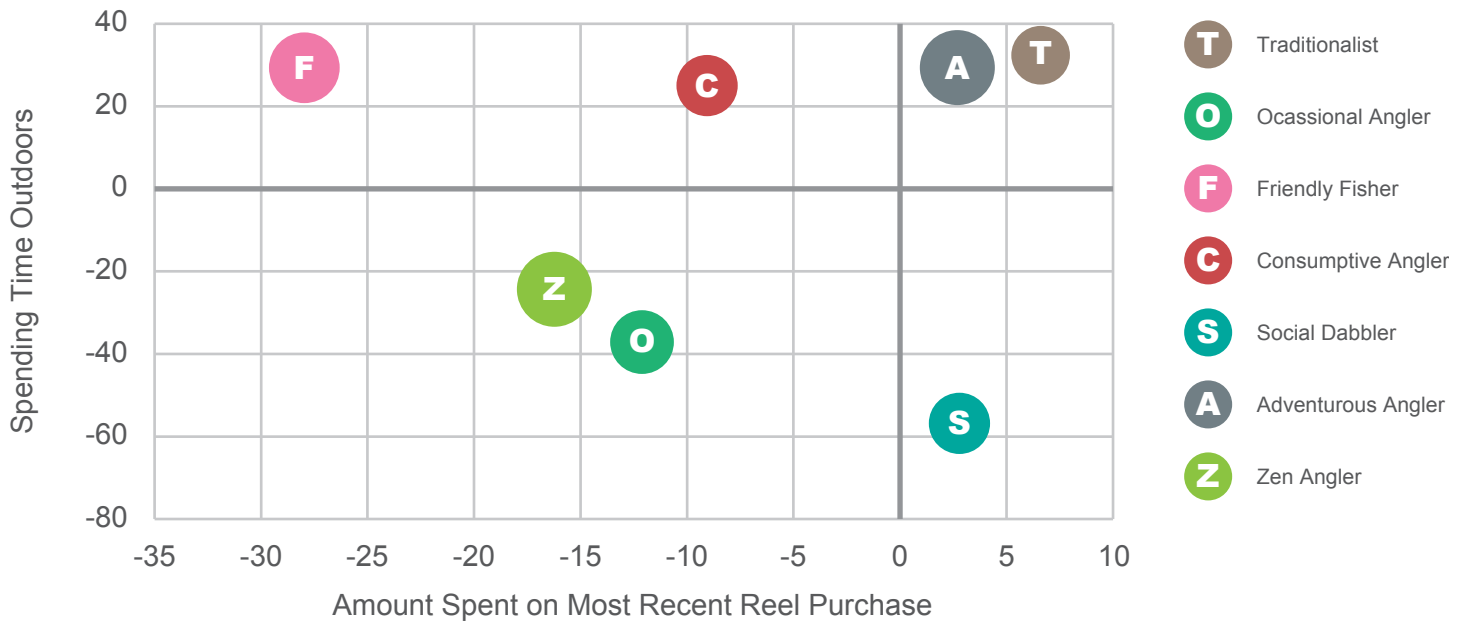
— Catching Fish For Food & Getting Away To Relax —



— Amount Spent Last Year & Spending Time Outdoors —



— Amount Spent On Reel Purchase & Spending Time Outdoors —



Note: Indexed spending estimates include only those anglers who spent money on fishing equipment within the past year, resulting in smaller sample sizes and wider margins of error for each persona.



American Sportfishing Association

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www.ASAfishing.org

The American Sportfishing Association (ASA) is the sportfishing industry's trade association committed to representing the interests of the sportfishing and boating industries as well as the entire sportfishing community.

We give the industry and anglers a unified voice when emerging laws and policies could significantly affect sportfishing business or sportfishing itself. ASA invests in long-term ventures to ensure the industry will remain strong and prosperous, as well as safeguard and promote the enduring economic, conservation and social values of sportfishing in America.

ASA also gives America's 49 million anglers a voice in policy decisions that affect their ability to sustainably fish on our nation's waterways through Keep America Fishing®, our national angler advocacy campaign.

America's anglers generate more than \$49 billion in retail sales with a \$125 billion impact on the nation's economy creating employment for more than 802,000 people.



Southwick Associates, Inc.

Southwick Associates is a market research, statistics and economics firm, specializing in the outdoor recreation markets. For more than 25 years, Southwick Associates has delivered comprehensive insights that have advanced strategic decisions across the entire outdoor community from resource agencies, industry associations and non-profit organizations, to utilities, outdoor manufacturers and businesses. We find solutions to problems others cannot solve.

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