The Recreational Boating & Fishing Foundation (RBFF) is seeking proposals from qualified research providers to develop a multi-year, phased market segmentation plan to identify market segments with the highest potential for growth within both existing consumer target markets and emerging markets.

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Attachments:
1. Proposal Cover Page
2. The RBFF Segmentation Review: General Findings, Methodology, Presentation of Results document
3. The RBFF Segmentation Review: Segment-Level Research Findings
I. REQUEST FOR PROPOSALS

The Recreational Boating & Fishing Foundation (RBFF) is seeking proposals from qualified research providers to develop a multi-year, phased market segmentation plan to identify market segments with the highest potential for growth within both existing consumer target markets and emerging markets.

II. SOLICITATION

Name/Address of Issuer:
Jessica Karazsia
Project Manager
Recreational Boating and Fishing Foundation
500 Montgomery Street, Suite 300
Alexandria, VA 22314
Phone: 703/778-5155
Fax: 703/519-9565
Email: jkarazsia@rbff.org

Please contact Jessica with any questions you may have regarding this RFP.

Date of Issuance: Friday, August 20, 2010
Closing Date and Time: Friday, September 10, 2010

III. BACKGROUND

RBFF is an independent, not-for-profit 501(c)(3) organization. Our organizational mission is to implement an informed, consensus-based national outreach strategy that will increase participation in recreational fishing and boating and thereby increase public awareness and appreciation of the need for protecting, conserving, and restoring this nation’s aquatic resources.

RBFF’s funding is administered through the U.S. Fish and Wildlife Service (the “Agency”) pursuant to a cooperative agreement between the Agency and RBFF. The original source of the funds, the Sport Fish Restoration and Boating Trust Fund, is comprised of excise taxes paid by manufacturers of fishing tackle and a consumer tax on motorboat fuel.

As part of its 2011-2013 Strategic Plan, RBFF identified several brand execution and market segmentation goals designed to develop awareness and participation in recreational boating and fishing. To meet its benchmarks for increasing brand awareness within new and existing markets, RBFF determined a key action item in this effort was to research and identify its highest potential growth markets. As part of
this action item, a comprehensive market segmentation study is required by December 31, 2010.

For more information about RBFF, please visit our organizational web site at RBFF.org.

IV. SITUATION ANALYSIS

While recreational boating and fishing remain two of America’s most popular pastimes, participation has remained relatively flat over the past 10 years. In fact according to National Marine Manufacturers Association (NMMA) data there has been a decline in boating over the past 3 years (-6% in 2008 alone). Fishing participation too has struggled; however there was slight increase in fishing this past year (possibly due to the economic downturn). The current universe of recreational boaters and anglers in the US is estimated at 112 million with approximately 67 million boaters and 48 million anglers.

The current audience targeted by RBFF’s effort is 70% male/30% female; age 25-54, generally rural with HHI of $50K to $150K. Recent shifts in outdoor activity interests, increasing economic pressures and increased demands on free time have made recreational activities such as boating and fishing especially vulnerable to continued decline.

Finding niches within the existing market segments and finding new and emerging segments with the best potential for growth will be critical to boating and fishing and the industries that support them. And therefore are key interests of RBFF moving forward.

Recently, RBFF worked with a vendor to catalog and review just over 50 different studies and research reports examining the participation, behaviors and attitudes of both traditional and non-traditional angling and boating participant and non-participant segments. The studies, nearly all commissioned by RBFF during the last 10 to 15 years, were conducted by a wide range of research firms using differing methodologies and research techniques. A structured template served as a basis for developing a short synopsis of each study that identified and assessed the:

- Audience Focus (general public, specific population group/sub-group) and key findings.
- Estimates of differing segment-levels demographic growth and participation in fishing, boating and other outdoor recreational activities considered as potential gateways to fishing and boating.
- Segment-level findings regarding attitudes, motivations, barriers and strategies for engagement, media preference and strategies for increasing participation in fishing and boating.
- Methodological and statistical rigor and reliability of the findings based on an assessment of the research design, data collection protocols, statistical procedures and analytic soundness (validity/appropriateness) of conclusions drawn.
The result of this research review is an overview of the current research landscape which identifies the type, quality and scope of information that exists as well as key findings. This effort was intended to provide baseline data on traditional and non-traditional demographic, geographic and lifestyle-based population segments that RBFF may consider for targeting as part of its efforts to promote recreational boating and fishing in the United States. A summary of these findings is attached. The successful vendor will have access to the catalog of previous studies.

V. NEEDS ASSESSMENT

At the broadest level, this research review suggests that:

- Research aimed at exploring and engaging non-traditional fishing and boating segments is clearly needed. Demographic and geographic shifts and changing lifestyles and attitudes within traditional angling and boating populations will inevitably mean that in order to maintain and grow the level of participation in the sports and the associated consumer spending within the industries that support them new participants and consumers must be identified, approached and engaged.
- The considerable investment in research aimed at measuring and tracking participation and identifying motivations and potential barriers among well established and traditional consumers of recreational fishing and boating has paid off in terms of generating reliable national-level research findings regarding those who have been most engaged in the sports.
- Key non-traditional and future consumer segments have also been identified and initial research has explored which of the primary non-traditional segments are anticipated to grow the fastest in demographic terms as well as in terms of their propensity and interest to engage in fishing and boating. The state of current knowledge with regard to what factors may lead to increased participation in boating and fishing across differing non-traditional segments is good, but far from complete.
- Fairly reliable estimates of participation of many of these non-traditional segments can be made, attitudinal predispositions have been explored and the most common barriers have been identified. The bulk of this research has been qualitative in nature. This is not unexpected or unique as early efforts to understand a consumer or demographic market generally begins in this way. However, quantitative and more far-reaching population based surveys needed to corroborate and confirm these findings, while incipient, are less than optimal sampling designs, small sample sizes and many other potential measurement errors.
- In addition, despite relatively frequent mention, little or no research has been done with some non-traditional segments, particularly Asian Americans and other east Asian immigrant groups for which potentially high cultural affinities for outdoor recreation that includes fishing whether from a boat or off a shore has been noted.
A closer look across the range of segments that have been identified and the research and findings conducted to date also reveals some clear and observable gaps in knowledge as well as contradictory and ambiguous findings which may indicate that these non-traditional segments should be further differentiated as well as potentially redefined.

Examples of such instances include the need to determine how geography, income or acculturation may serve to further differentiate individual segments, leading to a potential increase in the level of heterogeneity and the need for future segmentation. Examples that can be posited or inferred from the research conducted to date include differences between acculturation levels among more recent and more established Hispanics, differences in specific activity preference (fly fishing, saltwater fishing, speed boating, etc) within the same segments and the extent to which controlling for differences in income and education may ameliorate previously identified or anticipated cultural, gender, geographic or racial differences.

VI. PROJECT SCOPE

RBFF is seeking a strategic research partner to develop a multi-year phased research strategy with the first deliverable being due on December 31, 2010. The main objectives of this research are to:

➢ Identify socio-demographic profiles or full/robust tapestry profiles of American recreational boaters and anglers’, with special attention to the traits and patterns of those most inclined to participate.

➢ Identify market segments with the highest potential for growth within both existing consumer target markets and emerging markets.

➢ Identify participant ‘need states’ segments among the target audience in order to understand what current and potential recreational boaters and anglers’ look like.

➢ Identify life stage factors which influence participation of avid and occasional boaters and anglers.

➢ Understand the representation of the different segments, their current participation, what opportunities exist and the potential within these segments to increase participation - whether first time or repeat.

➢ Determine the barriers to participation that exist by segment.

➢ Understand what is most motivating to each of these segments.

➢ Identify and explore long-term trends in market demographics and consumption behavior among segments.

➢ Identify fact-based, actionable strategies and recommendations to maximize the return on RBFF’s marketing investments including identifying the motivators, messages and media consumption patterns that will be most effective in reaching and influencing the target segments.

RESEARCH SERVICES

The marketing research services may include, but are not limited to:
1) Primary Research  
2) Secondary Research  
3) Project Planning  
4) Reporting

VII. CONTRACTOR QUALIFICATIONS

Contractor must:
1) Provide study deliverables, pricing and timing. Specifically provide a detailed research strategy for year one with the first report of actionable findings due by December 31, 2010.
2) Provide flexibility in their approach. The business needs must dictate the design of the research and not a pre-determined template.
3) Prior Experience: The successful research partner will have demonstrable expertise in both qualitative and quantitative marketing research. Please provide a brief summary that details your experience in marketing research, particularly driven by a complex business problem that required not only market research expertise but also the ability to help the client apply what was learned.
4) In House Capability: Please describe any in house capabilities that would have a direct impact on quality. Indicate in your proposal if any portion of the project will be subcontracted and describe the subcontractor relationship.
5) Industry Experience: Describe experience in the recreational boating or fishing industry or similar industries such as outdoor sports, recreation, etc.
6) Other Experience: Describe other experiences that may be relevant such as experiences in the area of cause marketing or in the nonprofit sector.

VIII. DELIVERABLES AND TIMELINE

The following deadlines apply to this request for proposals:

| Issue RFP: | Monday, August 20, 2010 |
| Proposal Due Date: | Friday, September 10, 2010 |
| Final decision and vendor notification: | Friday, September 17, 2010 |
| Contractor begins work: | Monday, September 20, 2010 |

IX. PROPOSAL REQUIREMENTS

At a minimum, the proposal should include the following elements:

2. Description of how your corporation/organization/team fulfills the “Contractors Qualifications” outlined in Section VI. Examples of previous work that is similar to the work required here are requested.

3. Include a list of clients for whom you have performed similar work within the last two years. Please provide 3 client references that RBFF may contact.

4. Background on your corporation/organization/team, including history, staff size and experience, and other relevant information. If subcontracting is required, indicate whether you intend to subcontract with small businesses, minority-owned firms, and women’s business enterprises.

Applicants must submit proposals in hard copy (five copies) and electronic copy. Proposals should be prepared simply, providing a straightforward, concise description of the Contractor’s ability to meet the requirements of the RFP.

The electronic copy must be received by 5:00pm EST Friday, September 10, 2010 for consideration. Late proposals will not be accepted.

X. EVALUATION FACTORS FOR AWARD

Basis for Award
The award will be made to the applicant that conforms to the RFP’s requirements and is judged to represent the best value to RBFF. Best value is defined as the proposal that presents the best overall value to RBFF, cost and other factors considered, and which presents the most advantageous offer. Such offer may not necessarily be the proposal offering the lowest cost or receiving the highest technical rating.

Evaluation Criteria
Applicants are cautioned that this is a best-value procurement and that best-value concepts apply to this solicitation. In making its best-value determination, RBFF may award a contract resulting from this solicitation to the responsible applicant whose offer conforming to the solicitation will be the most advantageous to RBFF, price and other factors considered. RBFF shall give due consideration, as appropriate, to the overall merits of the proposal (including the relative advantages and disadvantages to RBFF), the experience of the Contractor, the cost of the proposal, and the needs of RBFF. Preference, to the extent practicable and economically feasible, shall be given for products and services that conserve natural resources and protect the environment and are energy efficient.

Applicants are cautioned that discussions may not be held and that RBFF may award the contract solely on the initial proposals. Accordingly, applicants should put forth their best efforts in their initial submission. However, RBFF reserves the right to conduct discussions if later determined by RBFF to be necessary. RBFF may reject any or all offers if such action is in the best interest of RBFF; accept other than the lowest offer; and waive informalities and minor irregularities in offers received.
XI. SPECIAL REQUIREMENTS

Federally Imposed Obligations

RBFF has entered into a cooperative agreement with the U.S. Fish & Wildlife Service, the general provisions of which are the Administrative and Audit Requirements and Cost Principles for Assistance Programs cited in 43 CFR, part 12, which incorporate OMB Circulars A-110, A-122 and A-133 by reference. Inspection, acceptance and procurement are governed by these requirements and principles. The successful applicant will be required to assume all applicable pass-through obligations imposed by the cooperative agreement, such as compliance with federal equal employment opportunity requirements and debarment and suspension certifications.

Accounting Records

All accounting records of the successful applicant relating to its performance under this award shall be kept in a manner that is consistent with generally accepted accounting principles as well as any applicable provisions of OMB Circular A-133, “Audits of States, Local Governments, and Non-Profit Organizations” and OMB Circular A-122, “Cost Principles for Nonprofit Organizations,” and 48 CFR part 31, “Contract Cost Principles and Procedures.” Upon reasonable notice to Contractor, RBFF, the U.S. Fish & Wildlife Service, the Comptroller General of the United States, and any of their duly authorized representatives shall have access to any books, documents, papers and records of Contractor that are pertinent to this award and have the right to audit and copy such materials during the term of this award and for a period of three (3) years after its termination or expiration.

Applicant Reimbursement and Compensation Policy

RBFF will not reimburse or compensate applicants for any time, fees and costs incurred while developing their proposals. Additionally, if an applicant is asked to present its proposal in person, RBFF will not reimburse or compensate the applicant for any fees related to the presentation, including but not limited to staff time, travel and out-of-pocket costs. RBFF will not compensate any applicant for time or fees incurred while negotiating a contract.

Use of Metric System

To the extent practicable and economically feasible, all accepted products and services shall be dimensioned in the metric system of measurement.

Ownership of Work Product

A) The successful applicant will be required to acknowledge that it has been ordered or commissioned to create or prepare a work consisting of the work effort and work product set forth herein and agree that this work is a “work made for hire,” and that the applicant shall have no rights to title or interest in and to
the work, including the entire copyright in the work or all rights associated with the copyright. The applicant will further be required to agree that to the extent the work is not a “work made for hire,” the applicant will assign to RBFF ownership of all right, title and interest in and to work, including ownership of the entire copyright in the work and all rights associated with the copyright, and will execute all papers necessary for RBFF to perfect its ownership of the entire copyright in the work. The applicant will not have rights to or permission to use the work without the prior written permission of RBFF.

B) By responding to this RFP, the applicant acknowledges and agrees that all deliverable documentation under this RFP (and subsequent contract) will be transferred to the U.S. Government in accordance with RBFF’s government contract. If the applicant intends to submit a notice of limited rights in technical data regarding any delivered technical data to RBFF, the notice shall include sufficient information to enable RBFF to identify and evaluate the applicant’s assertions.

Original Work

The successful applicant will be required to represent and warrant that the work the applicant creates or prepares for RBFF will be original, will not infringe upon the rights of any third party, and will not have been previously assigned, licensed or otherwise encumbered.

Public Releases

Except as required by law or regulation, no news release, public announcement or advertising material concerning any subsequent contract awarded pursuant to this RFP shall be issued by any applicant without the prior written consent of RBFF; such consent shall not be unreasonably withheld.

Applicants are also directed to OMB Circular No. A-133, Audits of Non-Profits, in particular the Government’s potential right to audit the Contractor’s records under §§ .200 and .210 (OMB Circular No. A-133 is hereby incorporated by reference). A copy of OMB Circular A-133 is available from RBFF upon request, or can be downloaded from http://www.whitehouse.gov/omb/circulars/a133/a133.html.
## PROPOSAL COVER PAGE

(All applicants must submit this completed form with their proposal.)

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Overview

EurekaFacts reviewed just over 50 different studies and research reports examining the participation, behaviors and attitudes of both traditional and non-traditional angling and boating participant and non-participant segments. The studies, nearly all commissioned by RBFF during the last 10 to 15 years, were conducted by a wide range of research firms using differing methodologies and research techniques.

EurekaFacts developed a structured template that served as a basis for developing a short synopsis of each study that identified and assessed the:

- Audience Focus (general public, specific population group/sub-group) and key findings
- Estimates of differing segment-levels’ demographic growth and participation in fishing, boating and other outdoor recreational activities considered as potential gateways to fishing and boating
- Segment-level findings regarding attitudes, motivations, barriers and strategies for engagement, and media preference for increasing participation in fishing and boating
- Methodological and statistical rigor and reliability of the findings based on an assessment of the research design, data collection protocols, statistical procedures and analytic soundness (validity/appropriateness) of conclusions drawn

The result of this research review is an overview of the current research landscape focusing on the type, quality and scope of information that exists with regard to traditional and non-traditional demographic, geographic and lifestyle-based population segments that RBFF may consider for targeting as part of its efforts to promote recreational boating and fishing in the United States.

Strategic and Higher Order Findings

At the broadest level, this research review suggests that:

- Research aimed at exploring and engaging non-traditional fishing and boating segments is clearly needed. Demographic and geographic shifts as well as changing lifestyles and attitudes within traditional angling and boating populations will inevitably mean that new participants and consumers must be identified, approached and engaged in order to maintain and grow the level of participation in the sports and the associated consumer spending within the industries that support them.

- The considerable investment in research aimed at measuring and tracking participation as well as identifying motivators and potential barriers among well established and traditional consumers of recreational fishing and boating has paid off in terms of
generating reliable national-level research findings regarding those who have been most engaged in the sports.

- Key non-traditional and future consumer segments have also been identified and initial research has explored the primary non-traditional segments that are anticipated to grow the fastest in demographic terms as well as in terms of their propensity and interest to engage in fishing and boating. The state of current knowledge with regard to the factors that may lead to increased participation in boating and fishing across differing non-traditional segments is good, but far from complete.

- Fairly reliable estimates of participation levels of many of these non-traditional segments can be made, attitudinal predispositions have been explored and the most common barriers have been identified. The bulk of this research has been qualitative in nature. This is not unexpected or unique as it is in this way that efforts to understand a consumer or demographic market generally begin. However, quantitative and more far-reaching population-based surveys needed to corroborate and confirm these findings, while incipient, are hampered by less than optimal sampling designs, small sample sizes and many other potential measurement errors.

- In addition, despite relatively frequent mention, little or no research has been done with some non-traditional segments, particularly Asian Americans and other east Asian immigrant groups for which potentially high cultural affinities for outdoor recreation, including fishing whether from a boat or off a shore, has been noted.

- A closer look across the range of segments that have been identified and the research and findings conducted to date also reveals some clear and observable gaps in knowledge, as well as contradictory and ambiguous findings which may indicate that these non-traditional segments should be further differentiated as well as potentially redefined.

- Examples of such instances include the need to determine how geography, income or acculturation may serve to further differentiate individual segments, leading to a potential increase of the level of heterogeneity and the need for future segmentation. Examples that can be posited or inferred from the research conducted to date include differences between acculturation levels among recent and more established Hispanics, differences in specific activity preference (fly fishing, saltwater fishing, speed boating, etc) within the same segments and the extent to which controlling for differences in income and education may ameliorate previously identified or anticipated cultural, gender, geographic or racial differences.
PRESENTATION OF FINDINGS

Hierarchical Segment Tree
Gender-based Segments

U.S. Men
Currently represent 32M Anglers
Stable participation rates but, demographic changes in traditional segments may contribute to lower rates.
Data Availability: Extensive
Data Quality: High

U.S. Women
Currently represent 16M Anglers
Participate less frequently than men, but at growing rates.
Data Availability: Extensive
Data Quality: High

Ethnicity-based Segments

African American/Black
Currently represent 3.2M Anglers
Low rates with little or only moderate increases.
Data Availability: Moderate
Data Quality: Moderate

Asian
Currently represent 1.6M Anglers
Data Availability: Extremely Limited
Data Quality: NA

Hispanic
Currently represent 2.7M Anglers
Participate at lower rates, with participation/engagement anticipated to increase.
Data Availability: Moderate
Data Quality: Moderate to high

Potential sub-segments
Acculturated/Non-acculturated
Male/Female
Geographic
By Country of Origin

Age-based Segments

Native American/Pacific Islander
No reliable segment-level data on
Data Availability: Very Limited
Data Quality: NA

Caucasian/White
Currently represent 2.7M Anglers
Participate at lower rates, with potential increases across gender and fishing type.
Data Availability: Extensive
Data Quality: High

Children, Teens, Young Adults
Currently represent 15.9M Anglers (ages 6 to 24)
Participation rates higher among boys and
Data Availability: High
Data Quality: Moderate

Adults/Seniors
Currently represent 17.5 M Anglers (ages 45+)
Data Availability: Extensive
Data Quality: High

Behavior-based Segments

Gateway Outdoor Activities
Estimated 217 M participate in outdoor activities; of those 100M participate in “core/gateway” outdoor sports and activities.
Data Availability: Extensive
Data Quality: High

Behavior-based Segments

Boating
56.4 M Boaters
Participation higher among males, those with high incomes, seniors and adults 45+.
Data Availability: Extensive
Data Quality: High

Potential sub-segments
Boat/Experience type
Ethnicity/race
Gender

Fishing
48M Anglers
Participation higher among males, those with higher incomes and regionally, within the Southeast.
Data Availability: Extensive
Data Quality: High

Potential sub-segments
Avid Anglers
Currently represent 34M Anglers fish more than three times a year
Stable participation rates.
Data Availability: Extensive
Data Quality: High

Occasional Anglers
Currently represent 13M Anglers fish once to three times a year
Lack of time is cited as one of the major barriers
Data Availability: Extensive
Data Quality: High
Segment-Level Analysis
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RBFF Segmentation Research Review:
Segment-Level Research Findings
## Segments

### Estimated Size and Representation in Total Population

<table>
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<tr>
<th>Segmentation by:</th>
<th>Segment</th>
<th>Market Size (Currently Engaged)</th>
<th>% of Total Segment Population Size</th>
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<td>Gender</td>
<td>Men</td>
<td>32M</td>
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<td>Women</td>
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* Unless specified otherwise current participation in fishing is reported.
** Current data insufficient to allow for estimation.
Demographic Segment: Women

Demographic and Behavioral Findings

2006 national level data indicate that 6 percent of females fished. Women make up 25% of all anglers, and go fishing less frequently than men. However, unlike men, women’s participation in the sport has been steadily increasing over the last decade.

Sub-segments Identified

Primarily segmented by race and ethnicity: Hispanic, African American; and occasionally by participation type, (e.g. fly-fishing); Rarely, if ever by age, income, or geography.

Methodological Assessment

Few large scale surveys of women’s interest or participation in the sport exist. Attitudinal research is largely qualitative.

Attitudinal and Motivational Findings

The current research suggests that women are motivated to fish for differing reasons than men. Primary drivers include viewing fishing as a family activity and as a source/means of providing companionship. Primary barriers include previous experience, access and concerns regarding personal safety, particularly among African-American women. Across racial and ethnic segments, preliminary research suggests that Hispanic women are highly motivated to fish as a means of increasing family/social-level interaction and African-American may have a higher propensity to value boating, and fishing from a boat than women of Hispanic origins.

Knowledge/Information Gaps:

Despite the size of this market segment, research is fairly limited, especially when compared to men. However, qualitative research which has focused on women suggest considerable differences in attitudes toward fishing, as well as boating exist among racial and ethnic communities. In addition, many potential sub-segments such as Asian American women, older women, women with children, rural, and more affluent women have not been researched.
Demographic Segment: Men

Demographic and Behavioral Findings
Fishing cuts across all demographic variables in the U.S., however fishing and boating is a heavily male dominated activity. A majority of anglers overall, and across differing types of fishing (freshwater/saltwater, etc) tend to be men.

Sub-segments Indentified
Primarily segmented by frequency and level of engagement and fishing type, (e.g. fly-fishing); age, income, or geography, more rarely by race/ethnicity, or household status (e.g. children present, retired).

Methodological Assessment
Considerable research aimed at measuring and tracking participation as well as identifying motivators and potential barriers. High quality methodological reliable national-level research findings exist regarding those who have been most engaged in the sports.

Knowledge/Information Gaps:
Few, if any, gaps in knowledge exist at the general segment level. However, research on attitudinal and motivational differences based on differing demographic and life-style characteristics (father with children, urban singles, retirees, etc.) has been carried out less frequently.

Attitudinal and Motivational Findings
Men have traditionally been perceived as engaging in fishing for sport and challenge and to retreat from the demands of daily life. Motivators most frequently identified include escaping daily routine, relaxation being outdoors and close to nature. However, some research suggests that these traditional motivations are changing as men take on a greater and more active role in family life or face a differing professional/work life style than in the past.
Demographic and Behavioral Findings

Participation rates are lower than non-Hispanic whites, higher than African American populations. Anticipated growth of this segment in demographic terms as well as the potential to increase participation suggest that this segment will likely represent a greater proportion of all anglers in future years.

Sub-segments Identified

Gender, level of acculturation, geographic location and country/culture of origin have been identified as potential differentiators however, little research has explored these factors.

Methodological Assessment

The demographic growth and participation rates of Hispanics are well documented. Attitudinal research is primarily qualitative to date.

Knowledge/Information Gaps:

Hispanics are identified as a key demographic segment and have been along with African Americans the focus of segment-based research. While considerable focus has been given to assessing participation rates and motivators to fish among Hispanics, the existing research approaches this segment as largely homogenous. Little research has focused on identifying differences in participation, motivation, attitudes and access to opportunities to fish based on level of acculturation, gender income, education, country of origin. between more or less acculturated Hispanics.

Attitudinal and Motivational Findings

Both qualitative and quantitative research point to strong ties to family in terms of introduction to the sport and motivation to participate. Introduction to fishing is typically within a familial context and having fun with family, relaxing and enjoying nature have been identified as primary reasons to go fishing. Lack of time is cited as a primary barrier followed by lack of information about fishing locations. While motivations and barriers have been well assessed, attitudinal differences, such as perceptions of fishing as a consumptive activity can be gleamed from the existing research but have not been fully explored.
Demographic Segment: African Americans

### Demographic and Behavioral Findings

Lower rates of participation with little or only moderate increases anticipated

### Sub-segments Identified

Gender and age based.

### Methodological Assessment

Research to date has been largely qualitative and focused on identifying constraints and barriers to engagement. Little research has addressed drivers (positive motivations) or assessed different strategies for growing participation in fishing among African Americans.

### Knowledge/Information Gaps:

African-Americans are identified as a key demographic segment with lower fishing participation rates. Existing studies have focused on identifying barriers over motivators. In addition, like Hispanics, African Americans are viewed as a largely monolithic group with and little research has been conducted to identify intra-segment differences among African Americans.

### Attitudinal and Motivational Findings

The existing research suggests that African Americans like other minority populations such as Asians and Native Americans face a differentiated set of barriers to engaging in fishing and boating than the non-minority population. These include insufficient sources of information (no knowledge of how to get involved), social-economic (low income) considerations which may also lead to a lack of time, inadequate facilities or lack of access, as well as social isolation or a reluctance or hesitancy to engage in activities in which low proportions of minorities are present or active.
### Demographic and Behavioral Findings

Highest youth participation rates occur between the ages of 6 to 12 when nearly one third of all boys and one fifth of all girls participate in fishing. Participation rates fall for both as youth age, with those for girls declining significantly more than boys.

### Sub-segments Identified

Gender and in accordance with level of interest/participation in outdoor activities. Ethnic, racial and socio-economic differences have been suggested but not identified.

### Methodological Assessment

Estimates of participation rates based on nationally representative samples vary considerably and do not incorporate standard measures, therefore participation may be under or over reported.

### Knowledge/Information Gaps

The extent to which quantitative research, particularly online surveys can adequately capture the experiential aspect of fishing for children is limited.

### Attitudinal and Motivational Findings

The current research has not explored children’s attitudes toward fishing in depth. Parents hold the key to engagement and as youth age the experiential aspects of engagement become more parallel to those of adults (i.e. the fishing experience is perceived less as a fun discovery or exploration and more as a relaxing activity or getaway experience). Regardless of age, girls experiences are markedly different from boys. They fish less often, have lower degrees of specialized/hands-on fishing experiences, drop out earlier and at higher rates than boys, and are less likely to perceive fishing as a fun or enjoyable experience.
Demographic and Behavioral Findings

Demographic changes in traditional segments are anticipated to contribute to steady or decreasing future rates. A majority of anglers overall, both freshwater and saltwater, tend to be male.

Sub-segments Identified

Primarily participation level and type, (e.g. freshwater, saltwater, boat fishing, fly-fishing)

Methodological Assessment

Estimates of participation rates based on nationally representative samples vary considerably and do not incorporate standard measures, therefore participation may be under or over reported.

Knowledge/Information Gaps:

Few, if any, gaps exist in assessing traditional angling segments either by gender or by type of fishing. However, as noted throughout this review, research on non-traditional segments who engage either actively or occasionally in the sport has been less frequently conducted.

Attitudinal and Motivational Findings

Research points to changes in motivations over time with traditional motivators giving way to more socially oriented reasons (fishing to be with friends and family) as well as fishing as means to relax/unwind. Barriers are increasingly perceived as being related to having time to engage in fishing because of more demanding schedules and obligations in both work and home life.
Demographic and Behavioral Findings

Boat owners are predominantly male, over the age of 45 with a relatively high level of household income.

Sub-segments Identified

Sub-segments studied are generally linked to boat purchase decisions (current owners, prospective owners, etc.) and to boating type and activity (motorized, non-motorized, boating for purposes of fishing, etc.)

Methodological Assessment

Estimates of participation rates based on nationally representative samples vary considerably and do not incorporate standard measures, therefore participation may be under or over reported.

Knowledge/Information Gaps:

Considerable knowledge gaps across non-traditional segments as noted above.

Attitudinal and Motivational Findings

Limited research has examined attitudes among non-traditional segments. The research that has been conducted to date suggests that differing motivators and more particularly differing barriers exist. However few conclusive overarching findings have been noted.