

Recreational Boating & Fishing Foundation

Boating and Fishing Social Media Audit

July, 2010



Objectives of Engagement

Determine the impact of the voice of the angler and boater in social media

- † Who is talking?
- † What are the topics they are talking about?
- † Where are they talking?
- † How often and when are conversations taking place?
- † Who are the online influencers (people and sites) in this segment?

Social Media Landscape: Data & Methodology

Data Collection

- † Radian6 covers more than 100 million sites and sources, including blogs, forums, public Facebook groups and Twitter

Timeframe

- † Posts analyzed from April 6, 2010—May 25, 2010

Process

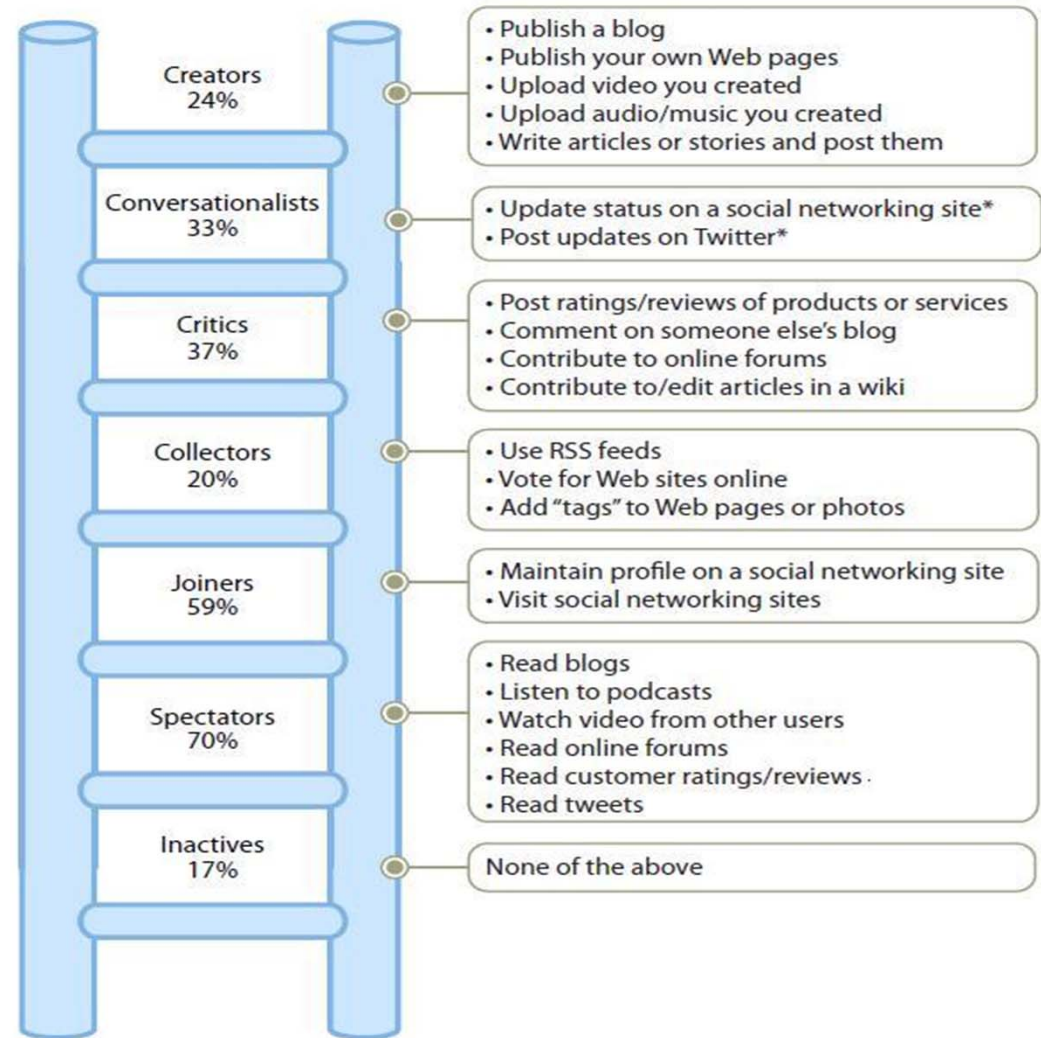
- † Discovered more than 800,000 posts related to fishing and boating in forums, blogs, Facebook, Twitter and YouTube during the sample period
- † More than 11,000 posts reviewed and analyzed at both a national and state level

Participation in Social Media

Typical Community Usage – Social Technographics Ladder

Groups include consumers participating in at least one of the indicated activities at least monthly.

Percentages indicate proportion of online population participating in at least one activity, at least monthly.



Base: US online adults

Source: North American Technographics® Empowerment Online Survey, Q4 2009 (US)
 *Conversationalists participate in at least one of the indicated activities at least weekly.

Conversations About Fishing & Boating

Fishing and boating are very popular topics in social media!!

There is more conversation about fishing in social media versus boating (about a 4:1 difference)

More people share experiences about fishing and boating in social networks like Facebook and Twitter, and most casual anglers and boaters post there.

The more avid anglers and boaters tend to post more in forums, where the conversation is focused on specific topics and is less about relating experiences. There is a higher percentage of boaters in forums than anglers.

About 20% of the social media outlets reviewed had content relating to both fishing and boating; most common in forums.

Overview of Findings > Fishing

There is a significant amount of conversation happening online related to fishing

Facebook is predictably, the “face” of a strong majority of casual anglers. Most posts are by individuals sharing their own fishing experiences, however, Facebook pages have a strong following

Twitter also has a majority of posts from casuals, is used to share fishing reports, and has a niche within the fly fishing community

Forums have active engaged followers/participants. Content is technically focused on equipment, where to fish and how. Strongest forums are at the state/region level & cater to avids.

Anglers are creating, sharing, consuming and commenting on a wealth of fishing content via **YouTube** and **Flickr**

Overview of Findings > Boating

There is a good amount of conversation happening online related to boating, but it is significantly less than fishing.

Facebook is the lead channel with posts by individuals sharing their own boating experiences.

Forums have active engaged followers/participants. Content is technically focused on equipment, repair and buying/upgrading boats. Strongest forums are at the state/region level and cater to avids.

Twitter comes in third with posts best summed up as shout-outs from people socializing on boats.

Social Media Personas

New



asking questions about how to execute basic aspects of a fishing or boating experience or identifying themselves as new to the sport

Casual



Posts about the experience of fishing or boating or about elements of them in a less detailed and specific manner. Content of posts are more personal and typically more of a sharing nature; less information seeking

Avid

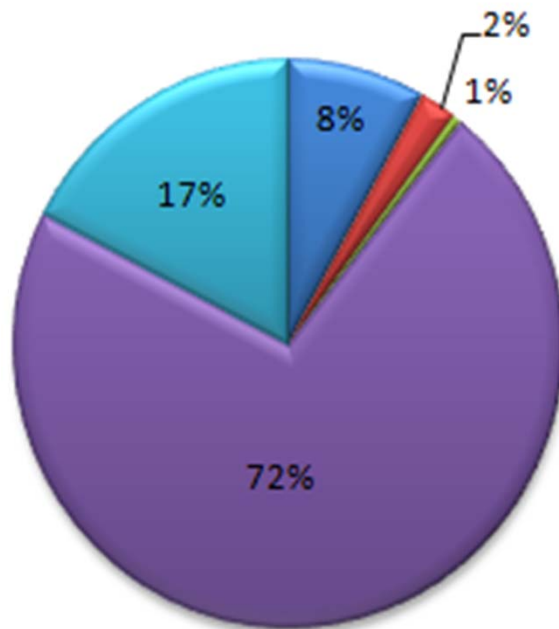


Posts about very specific topics with detailed information. Content of post is not personal but rather related to a specific aspect of being a successful angler or boater, e.g. strategies on how to fish for a certain species, where to fish, higher level equipment

*Segmentation of social media participants done to determine who is driving the online conversations.

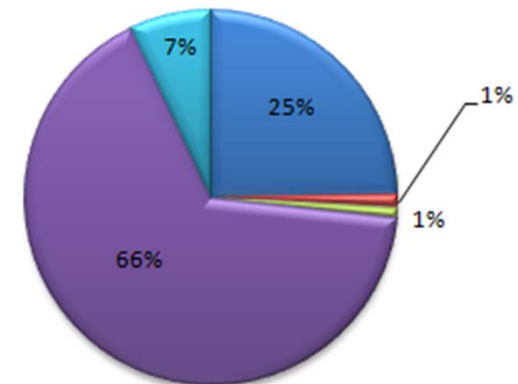
Conversations by Social Channel

Fishing



- Forums
- Blogs
- FB Pages
- FB People
- Twitter

Boating

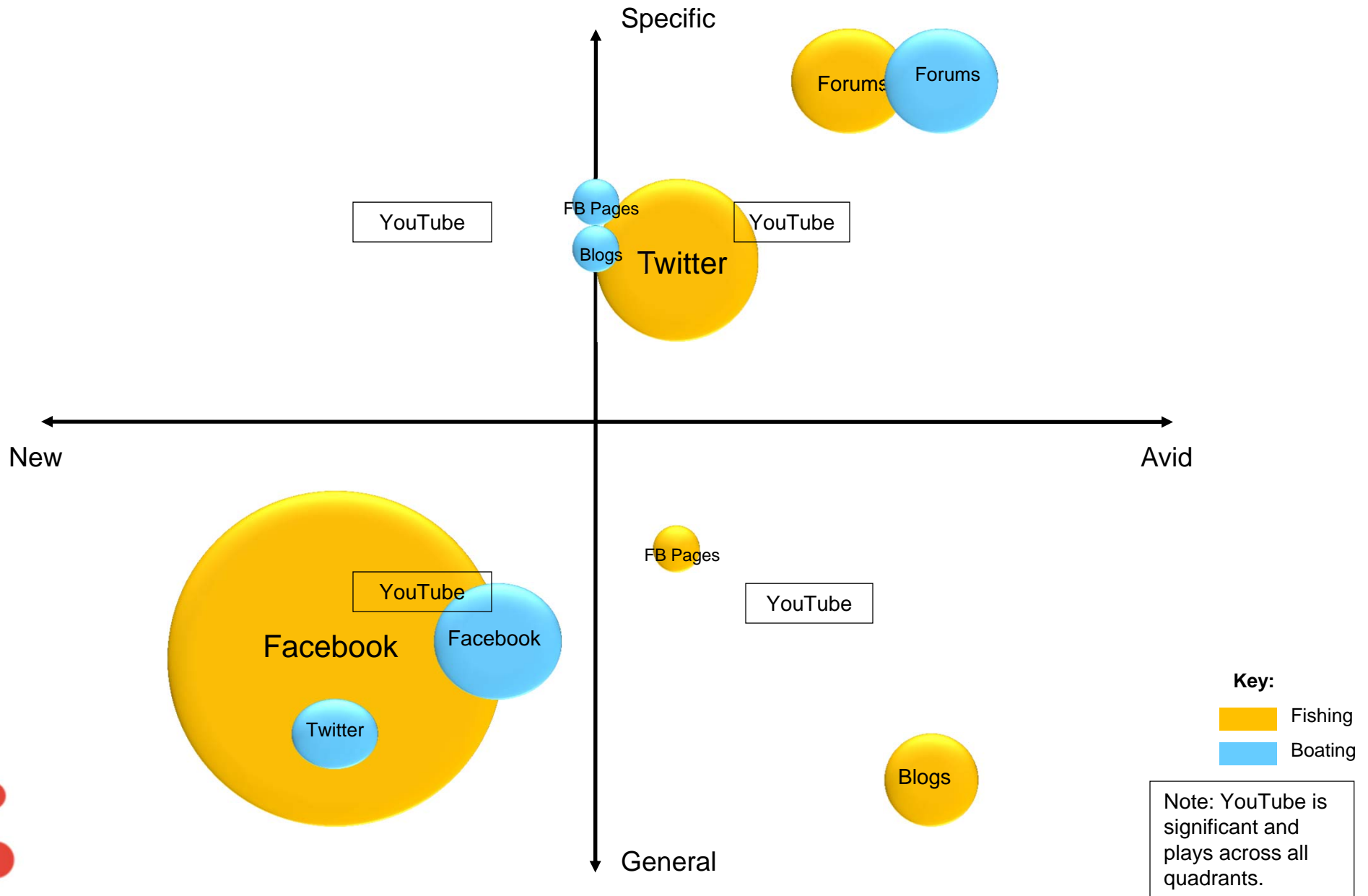


More than 697,000 posts in sample period

More than 173,000 posts in sample period

Posts analyzed from April 6, 2010—May 25, 2010

Fishing & Boating Social Media Landscape



Fishing Overview



Facebook Individual Posts

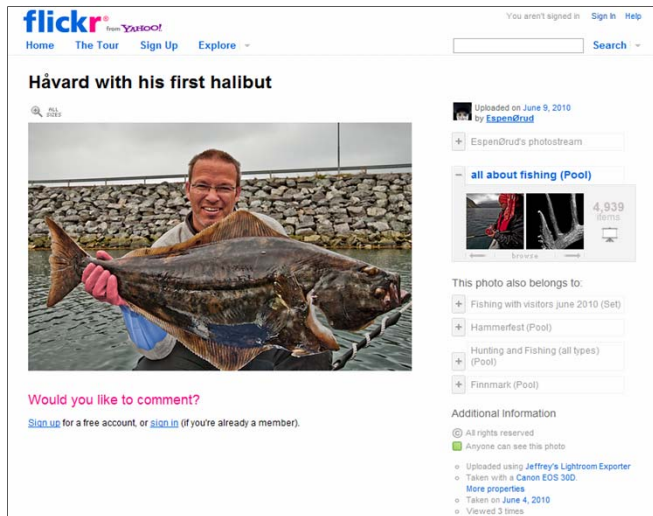
Huge volume of posts about fishing—more posts by individuals on Facebook than any other source. Most of them are casual anglers, who may go fishing multiple times but fish for the enjoyment and are typically non-competitive

- ⊕ Estimate 20-30 posts per minute during times from 10AM—12PM
- ⊕ Down to 3-6 posts per minute before 10AM and after midnight
- ⊕ More than 500,000 posts per month

Posts by individuals on Facebook are very much of a sharing nature, where people are sharing their fishing experience as part of their overall update on their days activities

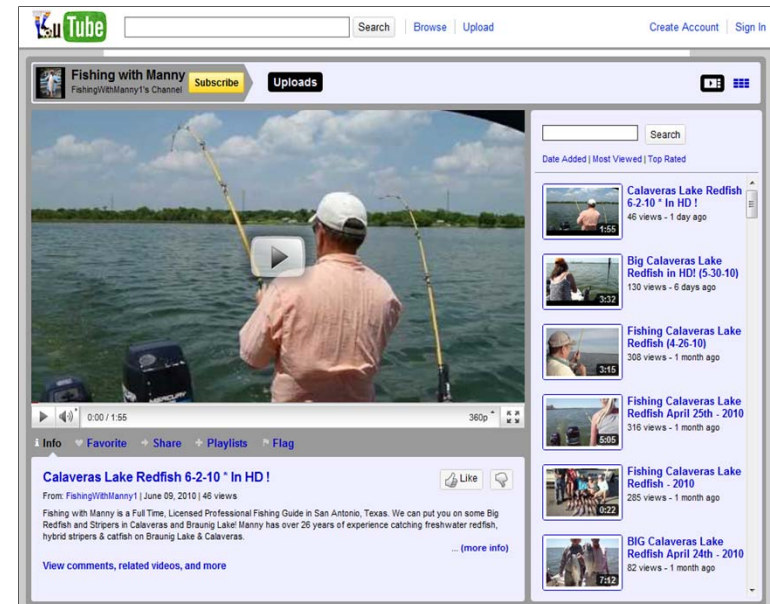
- ⊕ 30%--35% post before they go fishing; 65%--70% after
- ⊕ 15% of posts mention fishing with family members

25 – 30% post from a mobile device, and these posts are usually text based, not much photo or video in the status update itself



Flickr has more than 16,000 groups related to fishing—more than Facebook. The top 30 groups have more than 20,000 members. Flickr also has built in capability to geo-tag photos and upload to Google Maps

YouTube has more than 6,000 fishing channels, with an estimated 75,000—200,000 total subscribers. More than 158,000 playlists (lots of “how to’s”) with millions of views, and a total of more than 480,000 fishing videos



Twitter Posts

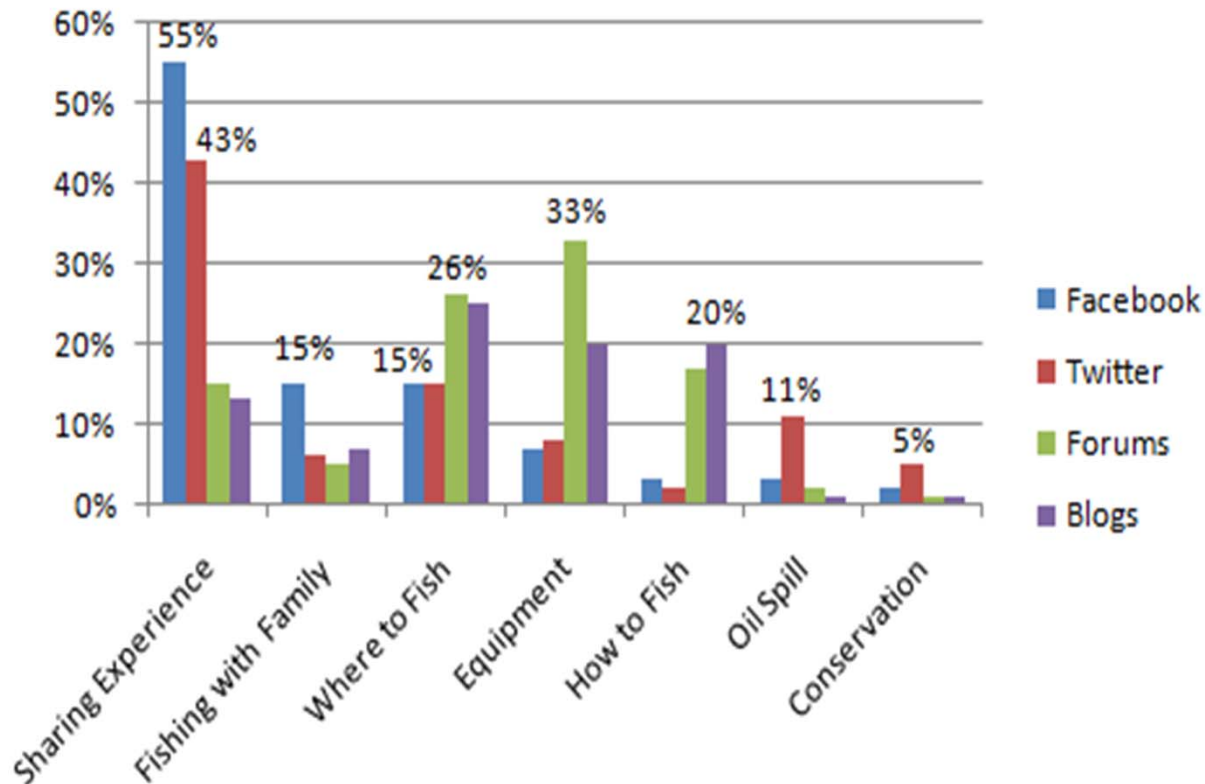
Content of posts has similarities to Facebook in that a majority of posts are sharing experiences. Also, anglers show that they like to use real time updates to share information at the state and local level, specifically:

- ❖ Fishing reports
- ❖ Fishing conditions
- ❖ The latest on the oil spill and water and waterway closures because of it
- ❖ A definite niche with the fly fishing community

Posts by persona are dispersed very similar to Facebook Pages, with a little less than 20% avids, and less than 10% new anglers

15% of posts come from a mobile device

Fishing Content by Social Channel



Looking at content by social channels shows interesting trends:

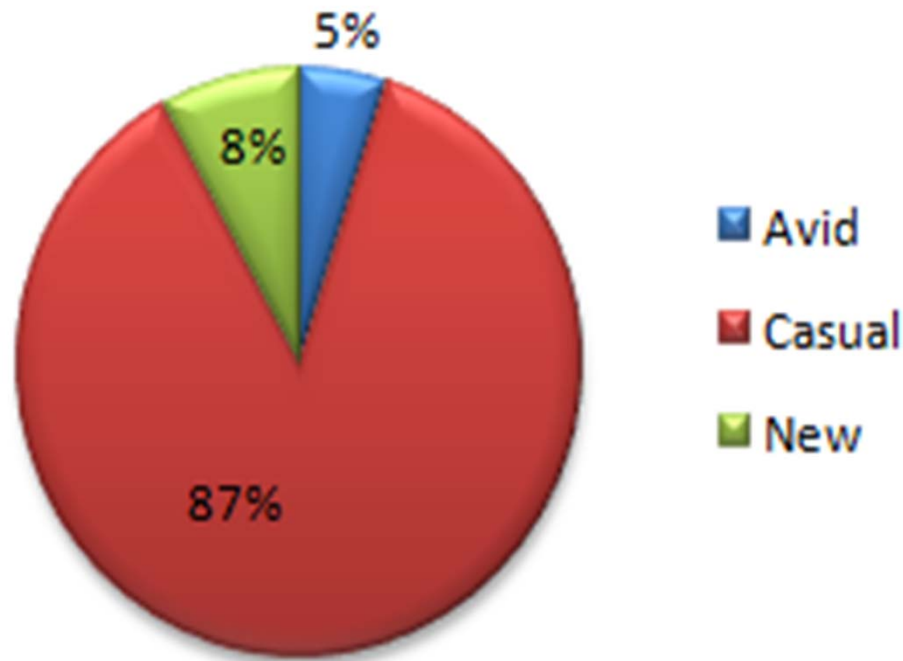
- Facebook is clearly the leading source for sharing experiences individually and with family
- Forums and blogs have the lead on more instructional content: Equipment, Where to Fish, and How
- Twitter is strong on Where to Fish but leads on the oil spill and conservation issues

Social Landscape Analysis

Fishing



Facebook Individual Posts—by Audience



Difficult to distinguish Casual from New; however by looking at content of posts it is clear there are not many avids in this group

Fishing is seen as a release, something fun to do, allows person to enjoy the outdoors, and carries sentimental value for many

Facebook Pages

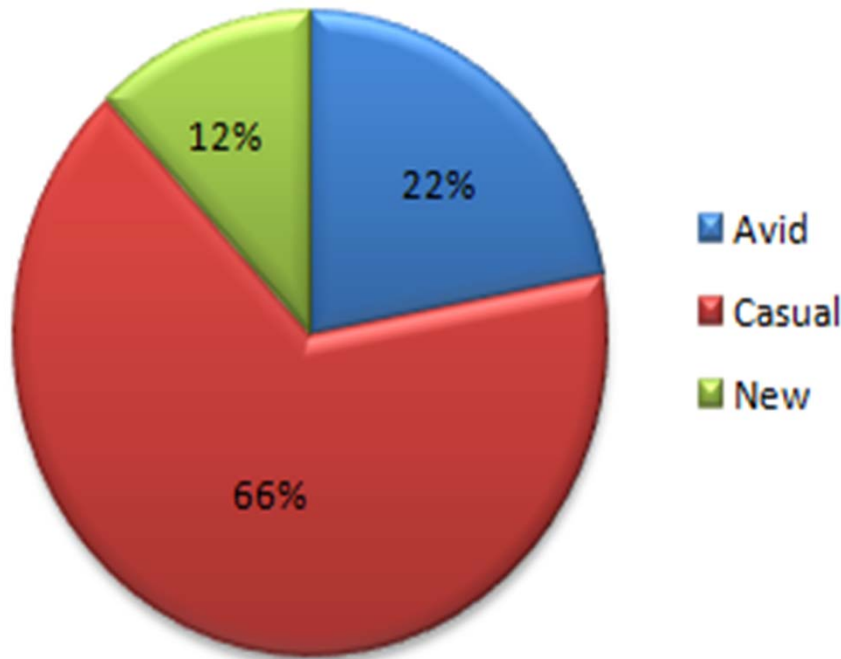
Top 40 Pages on fishing reach more than 2,000,000 people

Pages are different from individual posts in that they typically have an agenda:

- ✦ TV or magazine page
- ✦ Selling equipment, products, destinations or services
- ✦ Focused on a type of fishing (bass, fly, muskie)
- ✦ Focused on a geography (Norcal, Florida, UK)

With some of the Pages focused on specific topics relevant to more experienced anglers, there is a higher percentage of avids posting in this segment, but Casual anglers still make up most of the posts

Facebook Pages Posts—by Audience



Pages like World Fishing Network, Fly Fishing Group, Florida Sport Fishing Magazine attract more avid anglers in this segment

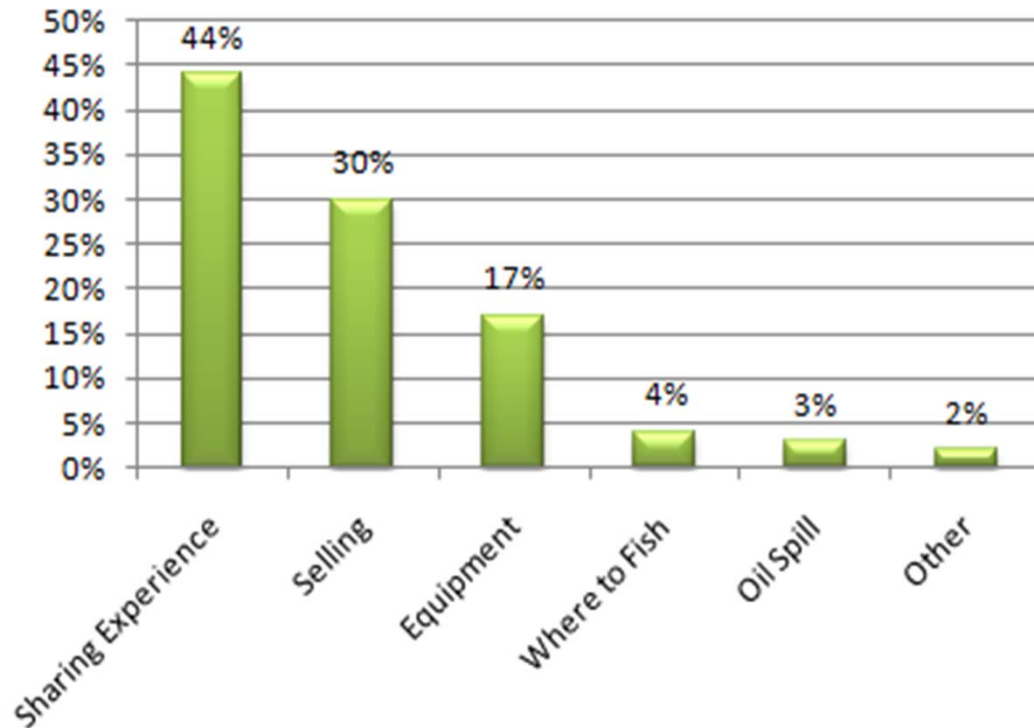
There are also a number of general Pages that attract the Casuals who post more frequently about a variety of topics

Facebook Pages Posts—by Topic

A number of these Pages are designed to sell products, services, interest in a show, etc.

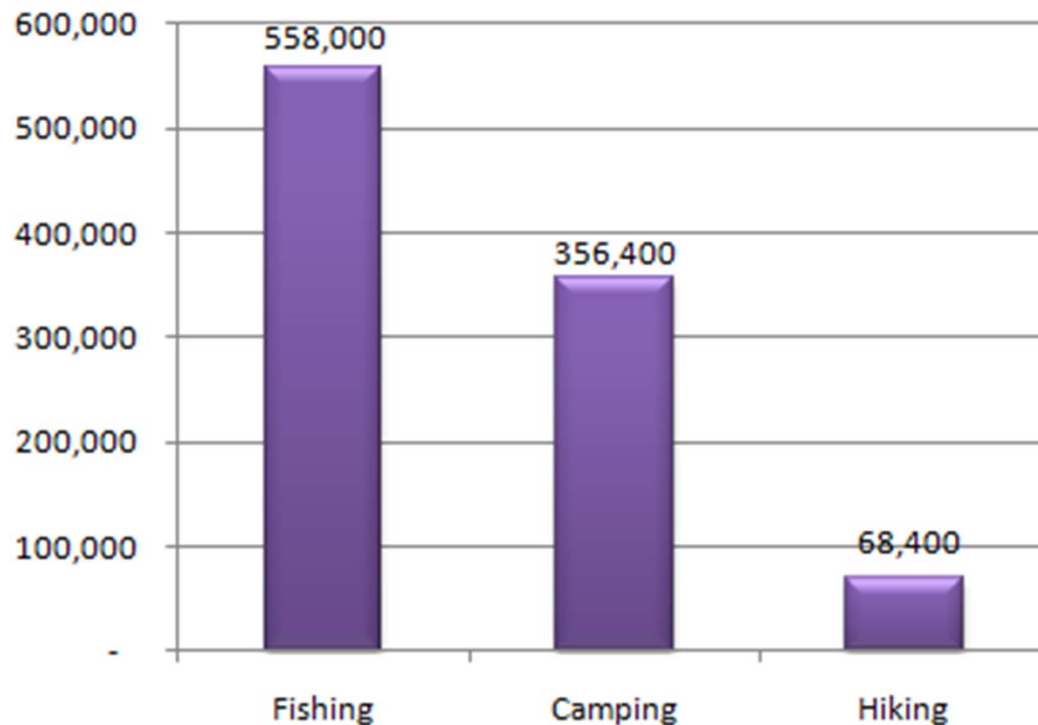
Sharing experiences is still the highest percentage of posts, but much lower than in other segments, and many times interspersed with other non-sharing content

Equipment posts are higher here due to specific nature of Pages



Comparison of Facebook Activity

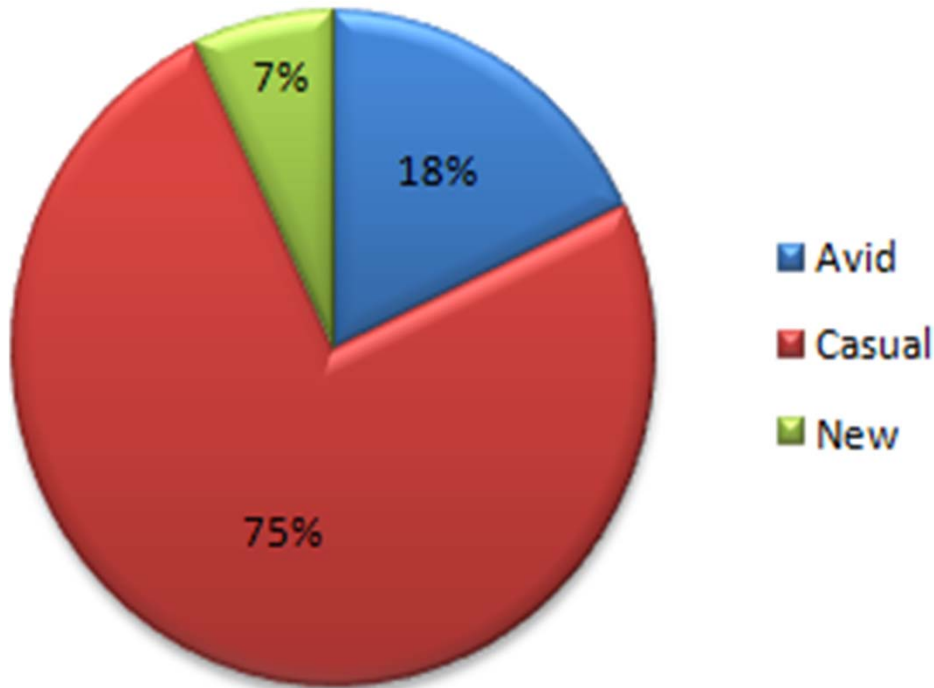
Estimated Total Status Update Mentions Per Month



Fishing has the highest volume of mentions in status updates, with 57% more than camping and hiking

Mobile usage for Fishing Facebook (FB) posts is about equal to Camping FB posts (25%--30%), and lower for Hiking FB posts (15%--20%)

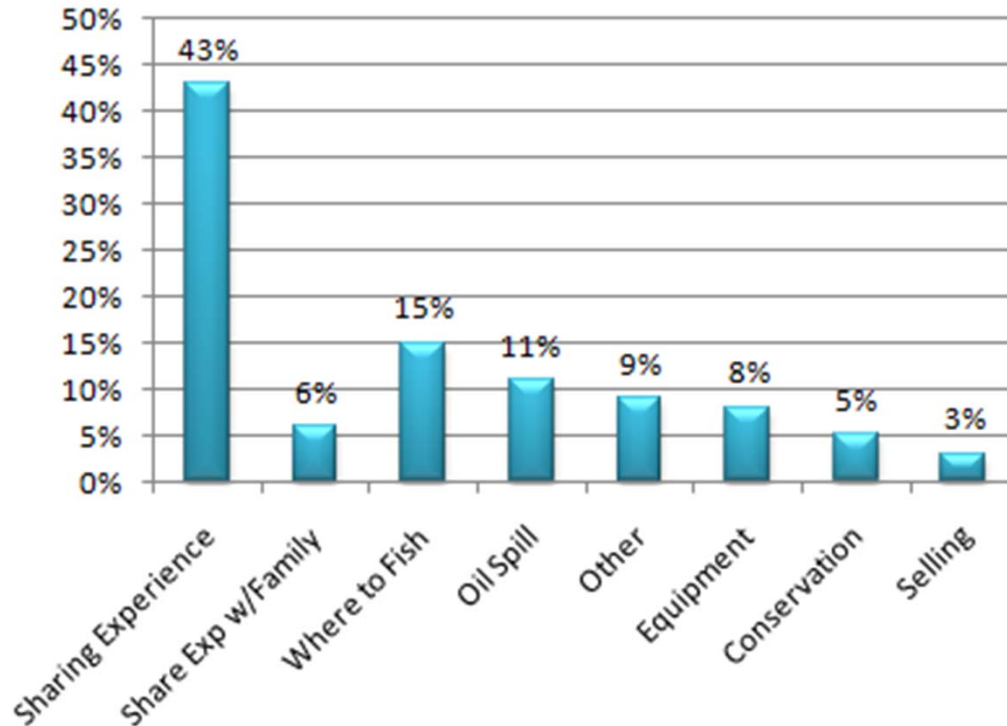
Twitter Posts—by Audience



Strong majority of posts similar to Facebook Individuals: sharing experiences

Those that are not sharing experiences are largely covering more specific topics geared to avids: fishing reports and equipment being the most common at 23%

Twitter Posts—by Topic



Some similarities to FB Individuals—most content is sharing experiences and where to fish (mainly fishing reports)

Biggest channel for oil spill with up-to-minute updates on areas closed down

Definitely used for quick updates on what anglers are doing and where to go

Forum Posts

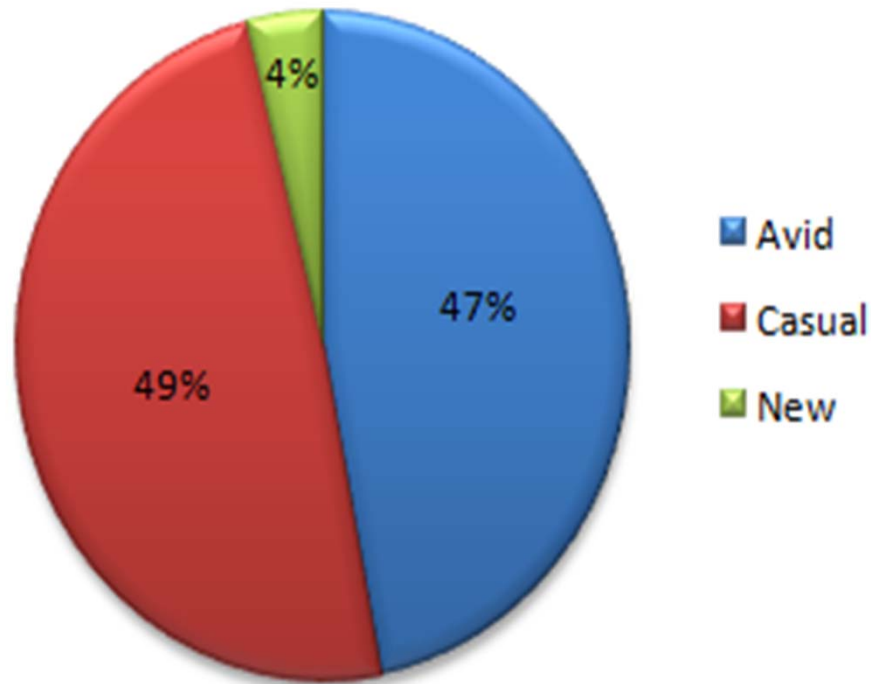
Forum posts are different than any other social media channel—there are a number of well organized, valuable forums at both a national and state level

Forums have the highest percentage of participation by avids (42%). They are the only social media channel where avids actively reach out to help casuals and new anglers when they have questions

Forums have highest level of two way conversations, and conversations are very specific to the forum topic. Not general like in Facebook

Some forums are very robust and have sections and threads on: types of fishing (fresh and saltwater), types of fish (bass, fly, walleye, deep sea, etc.), as well as state reports for each state. Others are focused on a geography or type of fishing (bass, fly, etc.)

Forum Posts—by Audience



Strong presence of avids here

We'll see more avids in blogs, but in forums the avids are participating—not a one way conversation

Fewer general conversations sharing experiences—forum users are looking for specific information and focus on it

Blog Posts

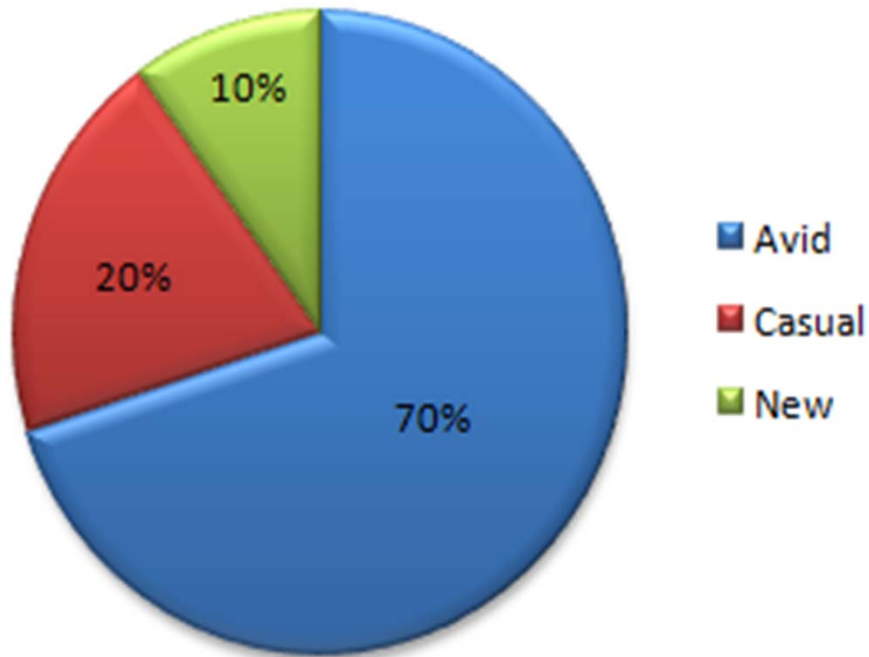
There are many blogs on fishing (we looked at the top 250), that are very small and niche.

The purpose of the more active blogs appear to be financially driven more often than not, with Google Ads and banners prevalent on the larger ones.

Blog posts were generally one way conversations—low rate of participation in most cases, and most posts coming from the host of the blog. Content on many blogs covered a variety of topics from where to fish, equipment, vacations, sharing experiences, how to fish. Usually not well organized and not differentiating.

Blogs typically deal with issues common to experienced anglers, and most posts are by avids.

Blog Posts—by Audience

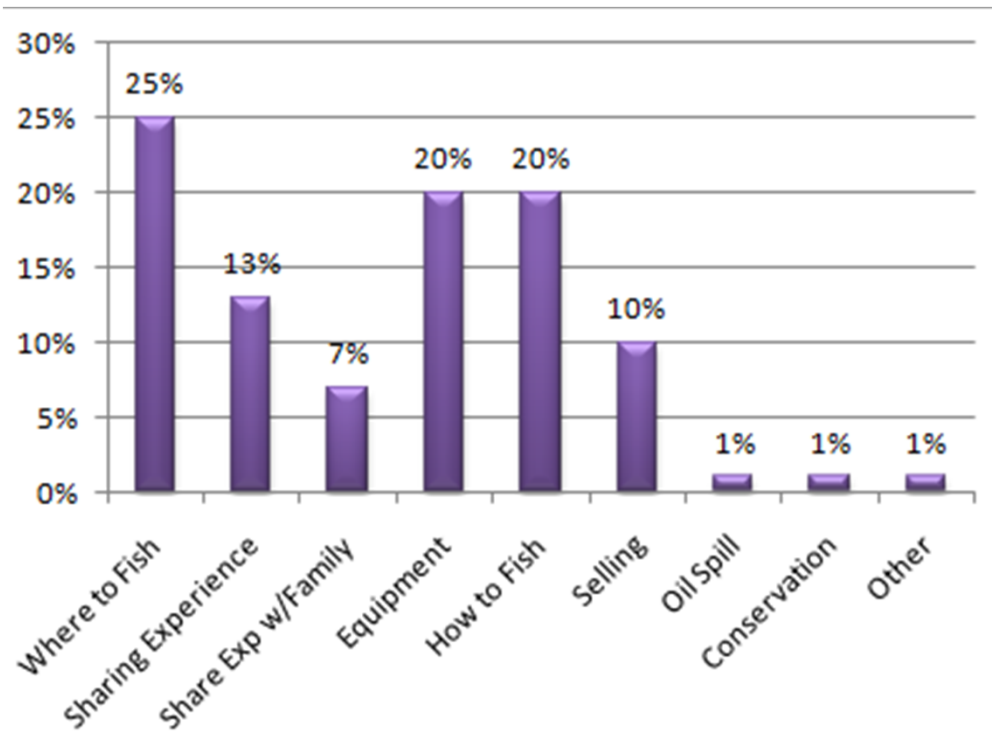


Strong presence of avids here as well—most blog owners are avids, and they are the ones primarily posting

Level of interaction with posts is low

General organization of these blogs is poor, making it difficult to find specific information that you may be seeking

Blog Posts—by Topic

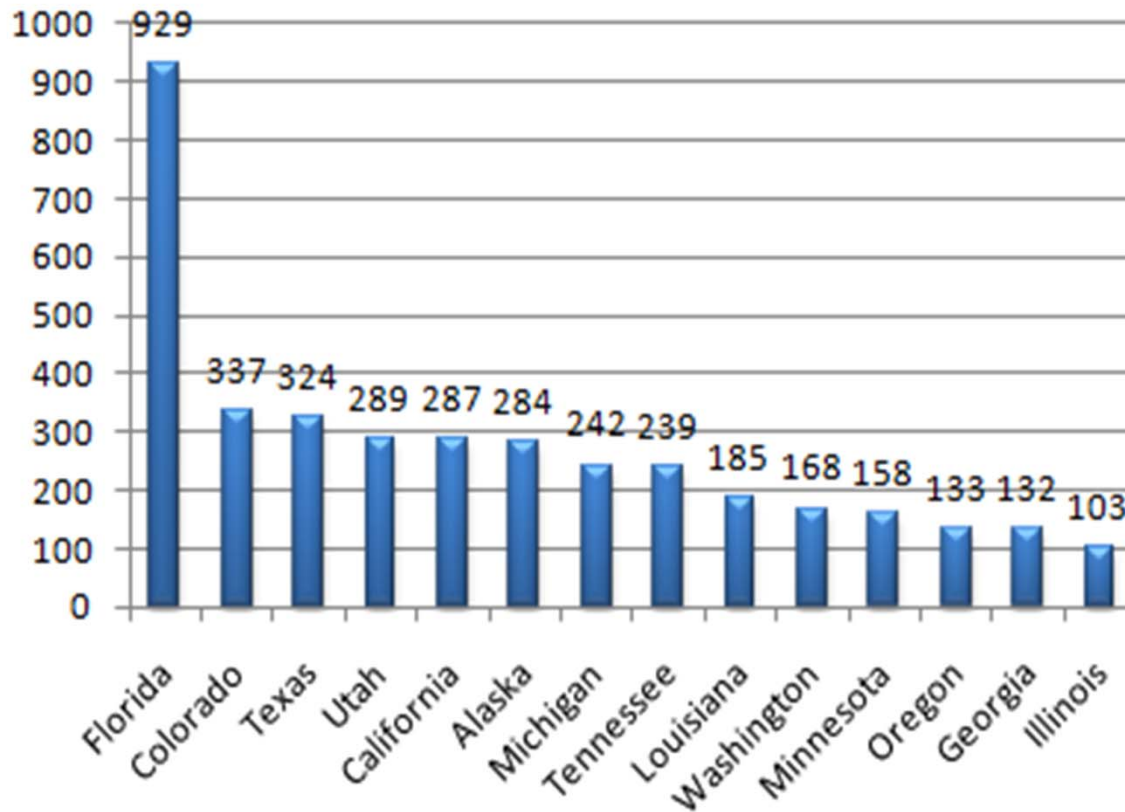


Blogs typically had little focus on certain types of content—the only common thread is that most of them were not focused in an area(s) of content

A stated purpose for the blog would make it much easier to navigate

Blog reach numbers are low, verifying that a smaller percentage of people visit and use these blogs

Information for Top States

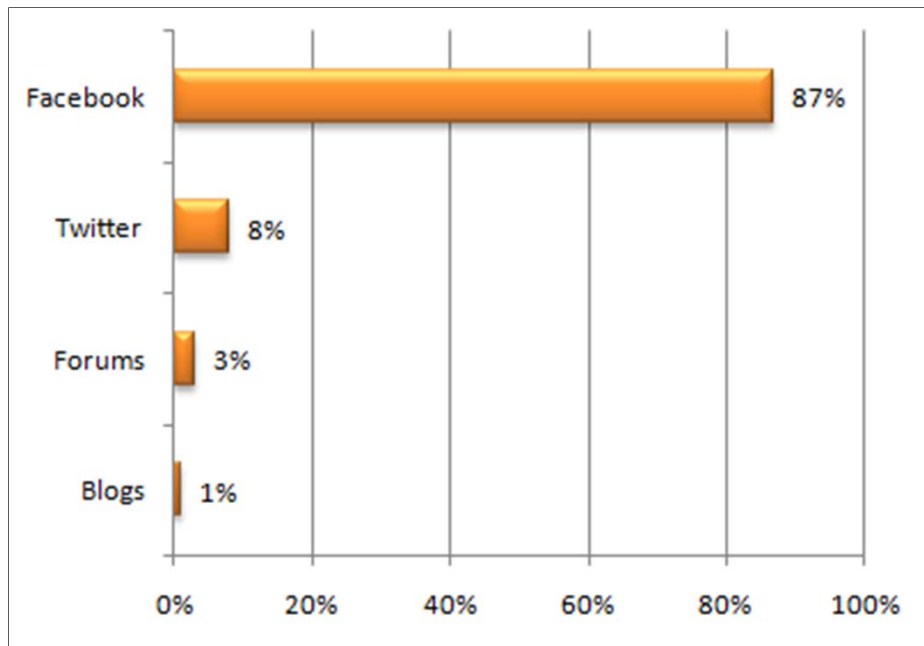


Twitter is typically a hub for state updates and fishing reports

Some national forums have state sections, but most conversations on Twitter, blogs and state forums

Fishing and Families/Kids

Percentage of Family Posts by Channel



Overall, posts mentioning fishing with families and children made up 12% of the overall posts

Content of posts was typically of two types: shared experience with the family and fishing programs/event for the kids

Boating Overview



Facebook Individual Posts

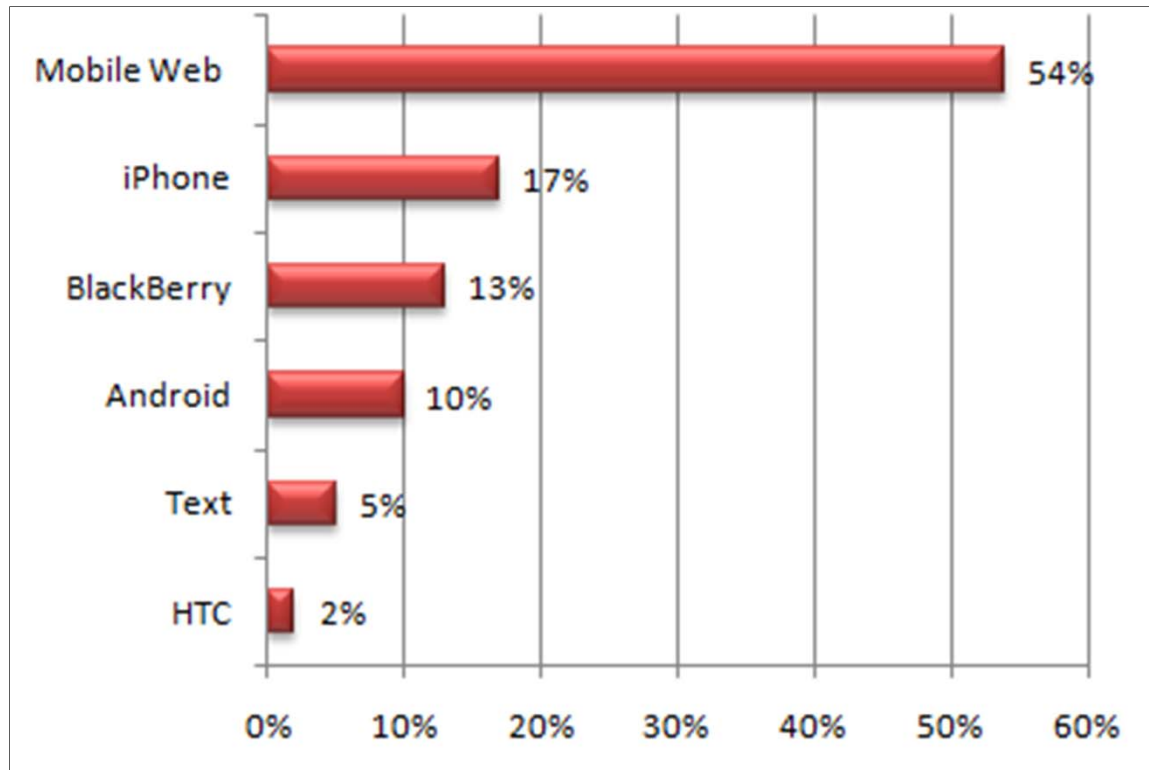
The behaviors we saw within Facebook for fishing holds true with boating as well, although Facebook volume for boating is less than fishing:

- ✦ Activity levels vary: estimate 3 posts per minute during peak times, down to 1 every 4 minutes in slower times
- ✦ More than 70,000 posts per month
- ✦ 20%--25% post from mobile devices
- ✦ 45%--50% post before they go boating; 50%--55% after
- ✦ 20% of posts mention boating with family members

Facebook is important for boaters to share the emotional importance of getting out on the boat, as well as the fact that they are indeed “going boating”

Tone and content tells us these people are mainly casual boaters, with some newbies and some avids

Sources of Mobile Content in Facebook



“Mobile Web” means the user accessed FB from the web on a mobile device, not through a mobile FB app. In these cases the specific device cannot be tracked

Not a significant difference in usage of the Facebook mobile apps for iPhone, Blackberry, and Android for anglers posting status updates

Forum Posts

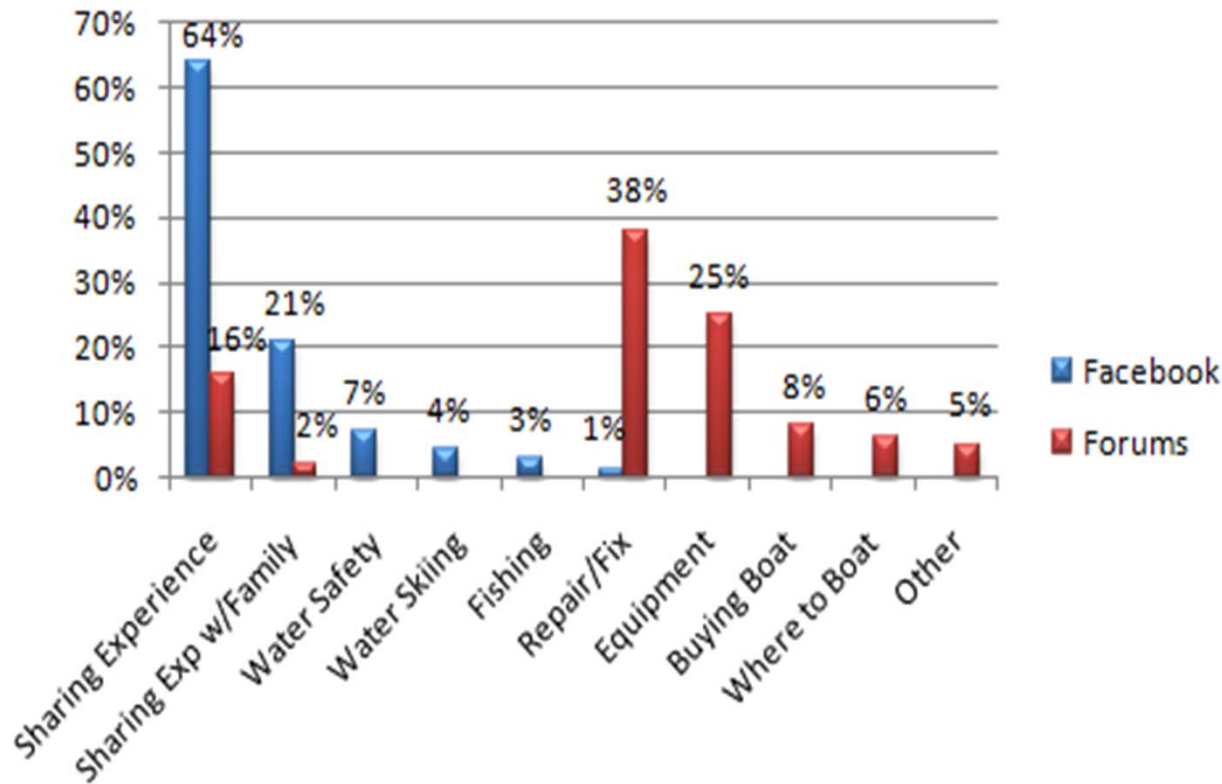
Forum posts are different than any other social media channel on boating as well—there are a number of well organized, valuable forums at a national level.

Forums have the highest percentage of participation by avids (38%). The avids in boating are more concerned with boat equipment, repair, and buying/upgrading their current boat.

Forums have highest level of two way conversations, and conversations are very specific to the forum topic. Not general like in Facebook.

Most forums have sections on equipment, repair, and buying boats, and the equipment conversations can be very specific; getting into specific types of motors and other parts.

Boating Content by Social Channel



Stark differences in content when comparing Facebook to Forums

Easy to see the difference in audiences, with Facebook content focused on sharing, and Forum content more focused on boat repair, equipment, and purchases

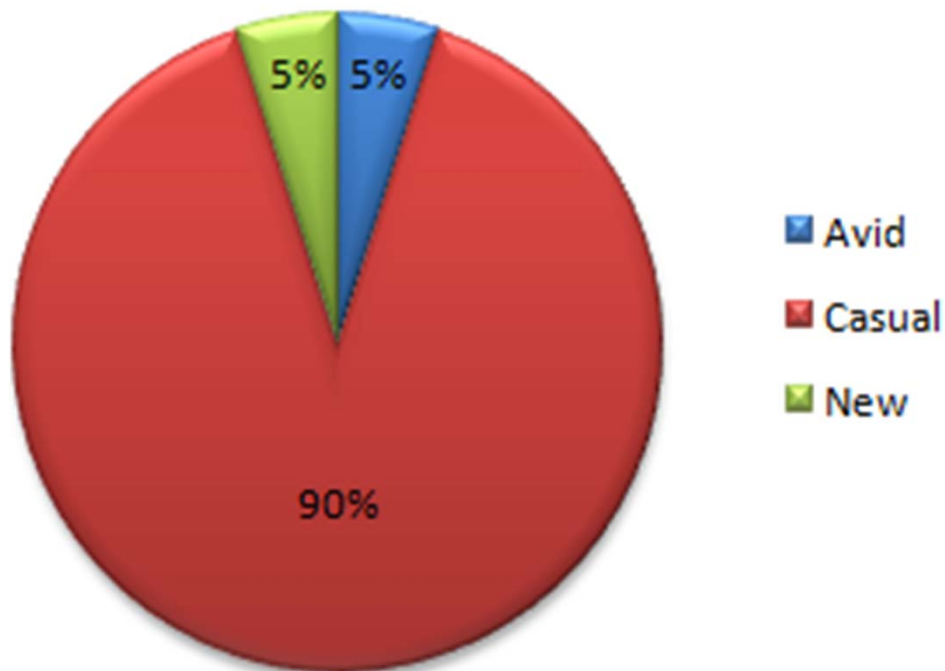
Note: Twitter posts, the next largest category can be summarized as shout-outs from people socializing on boats.

Social Landscape Analysis

Boating



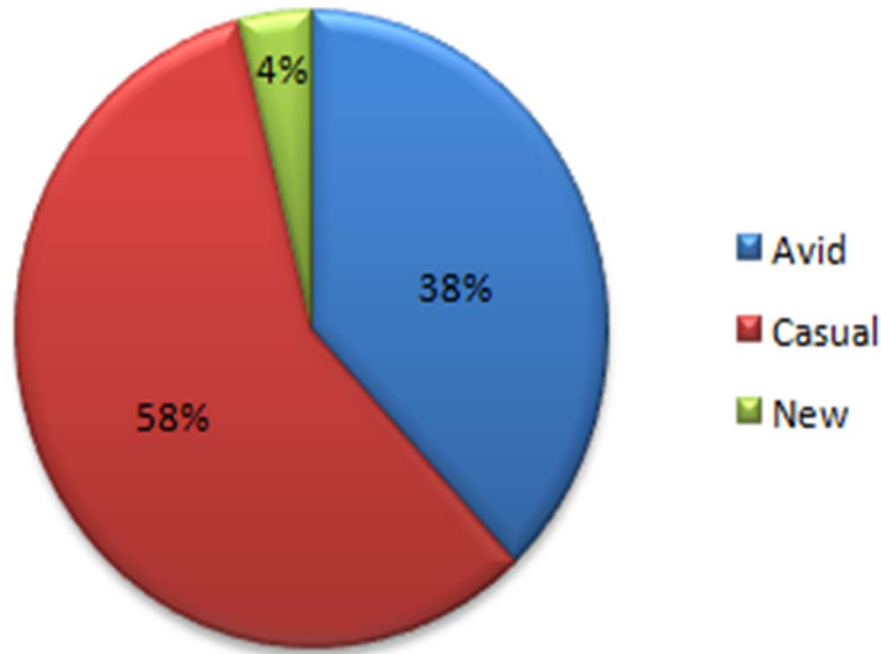
Facebook Individual Posts—by Audience



Difficult to distinguish Casual from New; however by looking at content of posts it is clear there are not many avids in this group

Boating is seen as a relaxation, an escape or get away from the rigors of everyday life

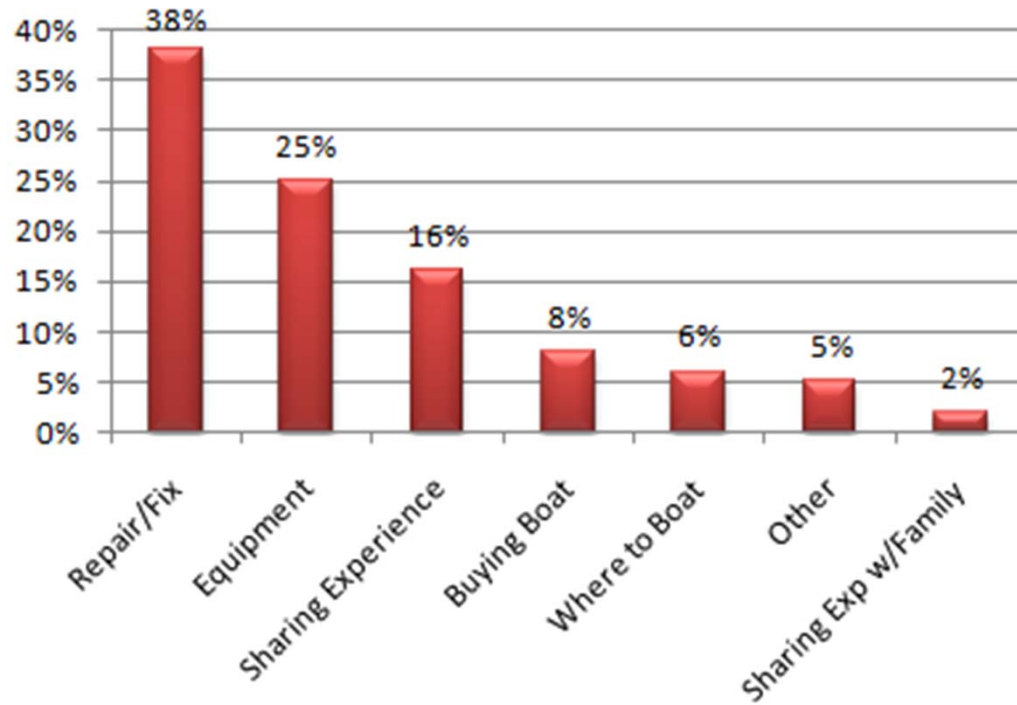
Forum Posts—by Audience



Strong presence of avids here

Much fewer general conversations sharing experiences—forum users are looking for specific information, and are very serious about it due to the investment they have in their boat

Forum Posts—by Topic



Repair/fix, equipment, sharing, and boat buying make up almost 85% of posts

Forum members are typically an active community, posting to answer questions from other members with recommendations and “here’s what worked for me...”

The End