

Casting a Wide Net: Identifying New Anglers and Boaters and Determining Tactics for Retention



February 23, 2020

Introduction & Research Overview



Ipsos

We are an independent company with global reach, expertise and capabilities. We conduct research in over 100 countries yearly, have teams in 87+ countries and over 40 offices across North America. We work with clients in all ranges.



Stephanie Don

Senior Account Manager
~8 years of experience (6+ at Ipsos) and my area of focus is foundational research, helping clients garner learnings on their market/ category, brand and consumer.



Quantitative research

- 15-20-minute, device agnostic, online survey among 1,000 consumers and over 600 Newcomers to Fishing & Boating



Community follow up

- 3 qualitative, sequential discussion boards among New Boaters/anglers (Newcomers)



Key Learnings

Who they are

Segment alignment
Key demographics
Motivators

Participation

Why fishing/boating
Emotional connections
Adjacent activities

Barriers

Former barriers
Experienced barriers

Commitment

Likelihood to continue
Future motivations
Investments in the sports

Engagement

Content themes
Stakeholder Reach-out
Support



Previous Segmentation Research

POTENTIAL GROWTH TARGETS FOR RBFF (2019)



Research conducted in 2019 identifying potential growth targets for boating and fishing determined that **Active Social Families** presented the greatest opportunity for targeting due to strong interest, fewer competing activities and strong motivations.

TWO secondary targets were also identified and represent other portions of active boaters and anglers.

The majority of New Anglers and New Boaters segment into Active Social Families (ASFs).



New 2020 Angler & Boater

Compared to the general U.S. population, **new anglers** and **new boaters** are:



younger (25 – 34),

skew **Hispanic**

have **kids in the household**

live-in **urban** areas

Implications

Consider how to increasingly target these consumers in urban areas considering their geography, household and access to water.

With so many Newcomers taking their kids, consider how to maintain kid interest through partnerships and content, knowing **kids today are the anglers/boaters of the future.**

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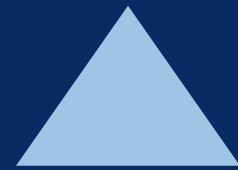
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Why Fishing & Boating NOW

Invitations

50%-60% of new/ reactivated anglers and reactivated boaters were invited

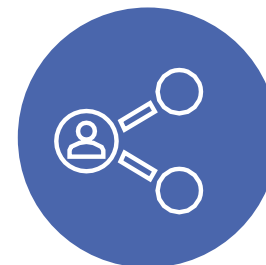


Extra time

40-50% of new/reactivated anglers found they had extra time due to various circumstances

Advertisements

1 in 4 new anglers mentioned seeing advertisements on TV, Social Media or in a magazine



Social distancing*

Many mention being outside provided a feeling of security while still being able to socially connect with others

Children

A third of new/ reactivated anglers were asked by children to go fishing



Dis/connection*

Nature forced most consumers to relax, step away from devices and focus on making memories and meaningful connections



*Indicates a theme that resonated strongly in qualitative research

Participation in Adjacent Activities



Rank-order

% ONLY FISHING

% ONLY BOATING

16% (New)
vs 36%
(Established)

4% (New)
vs 14%
(Established)

Its an early, all-day or all-weekend trip

*"A perfect day to go fishing with my family and friends is when **we leave early for our adventure** ... we carry snacks, we return to the place where **we are normally camping**, and we continue with the joy of **being together and having had a good day.**" – New Angler*

They boat, fish, swim, enjoy the time together

*"It starts with us getting on a boat and **just cruising** the lake to find the perfect spot to fish. We have with us **fishing poles to fish** if we want but we all are also **wearing swimwear** in case we want to take a dip. The day is spent **laughing, dancing, and just enjoying** each other's company.." – New Boater*

Lots of activities

*Doesn't matter if we go for **an hour or a day.. or a week** when we are camping.. We can go to a local lake... the mountains or closer to the beach. We've done **camping** and **fishing** and **kayaking** at all those places. When camping, we go **hiking** and **play cards**.. we **swim** and kayak in the open lake...But at the end of the day it is satisfying to know that together we did something.. **successful at catching fish or not.**" – New Angler*



Typical Trips

START OF DAY

- Start early in the morning, then lasts most of the day Ability to select prime spot
 - Maximize daylight hours (and fun)
 - Water is calm
- Breakfast in tow
- Eager and on-time

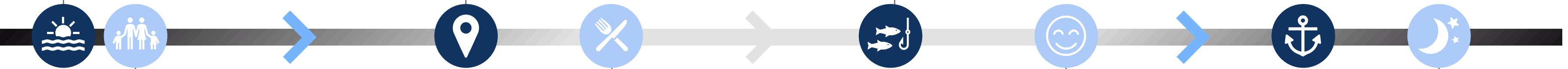
We will go out on the nearby lake, so that we can enjoy the familiar but also the beauty that is so close to our city."

WHERE

- Nearby (lakes, rivers most common)

ACTIVITIES

- Music is playing
 - Water sports (swim, pier jumping, ride jet skis, etc.)
 - Boating
 - Fishing (some prefer to catch many, some are unconcerned)
- Watching fireworks
- Camping
- Hiking
- Sunbathing
- Relaxing
- Cooking the day's catch



THE SQUAD

- Friends and/or family

SUPPLIES

- Food & Drink
 - Cooler
 - Drinks (soda, energy drinks, alcohol)
 - Snacks (chips, cookies, sweets, jerks, etc.)
 - Sandwiches
- Entertainment
 - Phones, tablets
 - Speakers (often Bluetooth)
 - Gaming devices
 - Chargers, fully-charged batteries on all devices
- Games (dominoes, cards, etc.)
- Books Fishing/boating gear
- Miscellaneous items
 - Blankets
 - Bug repellent

EMOTIONS

- Fulfilled
- Joyful/ Lighthearted (laughing)
- **Social connection**
- Relaxed, disconnected from daily life
- Moments of excitement, energy
- Pride at child's abilities
- *Important that all participants feel included and had a nice time (as it can be hard to find common points of interest/enjoyment with children)*

CLOSE OF DAY

- Out all day
- Many NCs also prefer an all-day experience

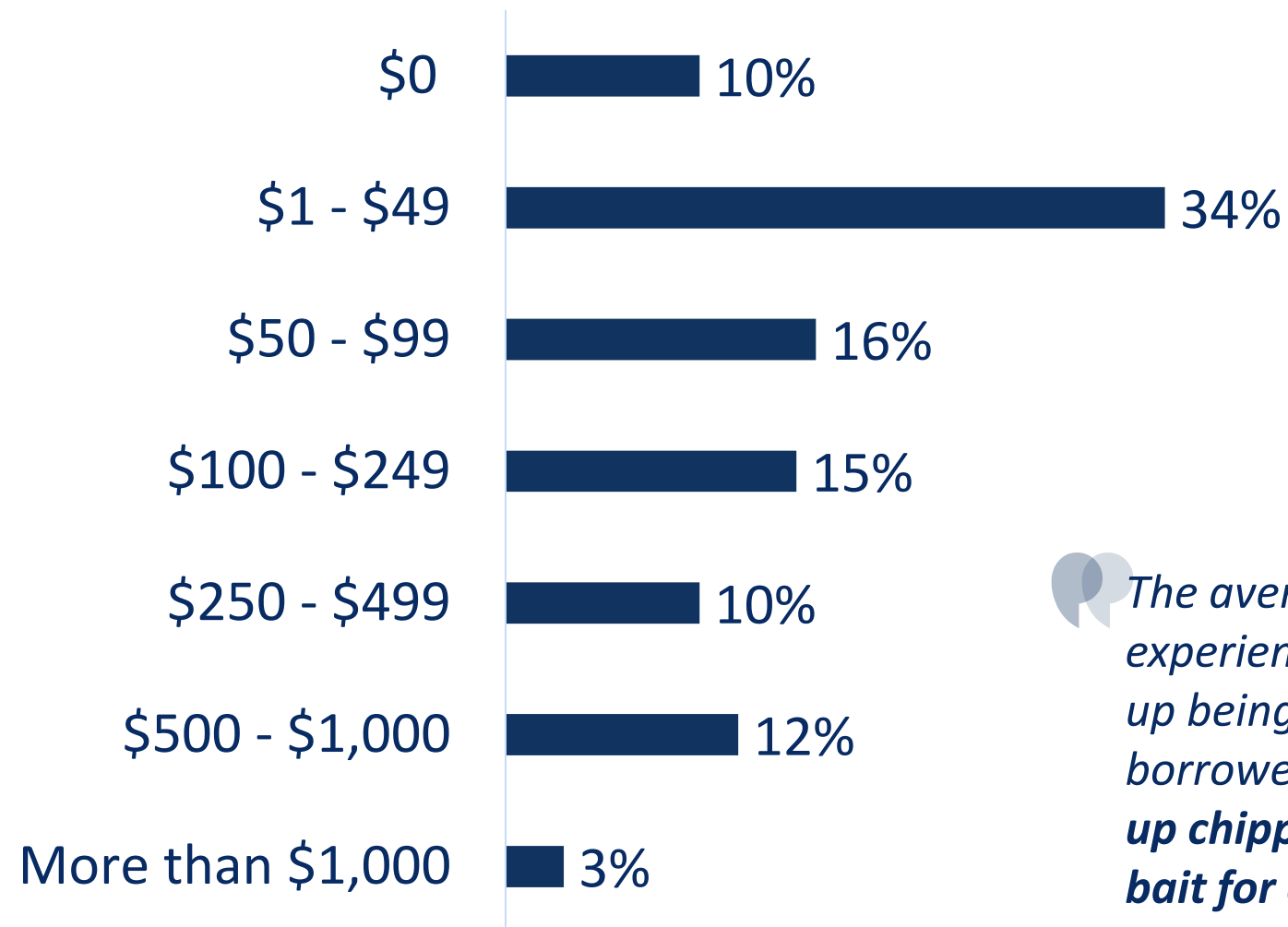
Enjoy the moment, feel the connection with nature, relax, laugh and have a good time."



Spend on Fishing Trips

Amount Spent on Average Fishing/Boating Experience this Year

Does not include cost of gear purchased



The average fishing and boating experience for me this year ended up being rather cheap. Since I borrowed the rod and reel, I ended up chipping in for gas for the boat, bait for everyone, and drinks for everyone as well. The

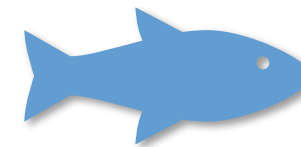
Sources of Spending



Fuel for transportation, as well as for the boat



Food & Drinks, especially when hosting family or friends



Bait and tackle purchased at marina or local shop (not pre-bought with gear)



Accommodations if renting a house/cabin, camping, or staying at a hotel



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Former Barriers



Other priorities

~35% of newbies mentioned other priorities as a barrier in the past (own, kids', friends')



Not enough time

~30% of newbies didn't have time (particularly strong barrier for reactivated anglers)



Lack of interest

25-35% of newbies thought they wouldn't enjoy boating or fishing



Experienced Barriers



User experience

Hurdles related to low experience (not catching fish, tangled lines, getting lost etc.) were experienced by some



Information access

Ensuring information related to policies, laws, and educational content is easy to find would have saved many time



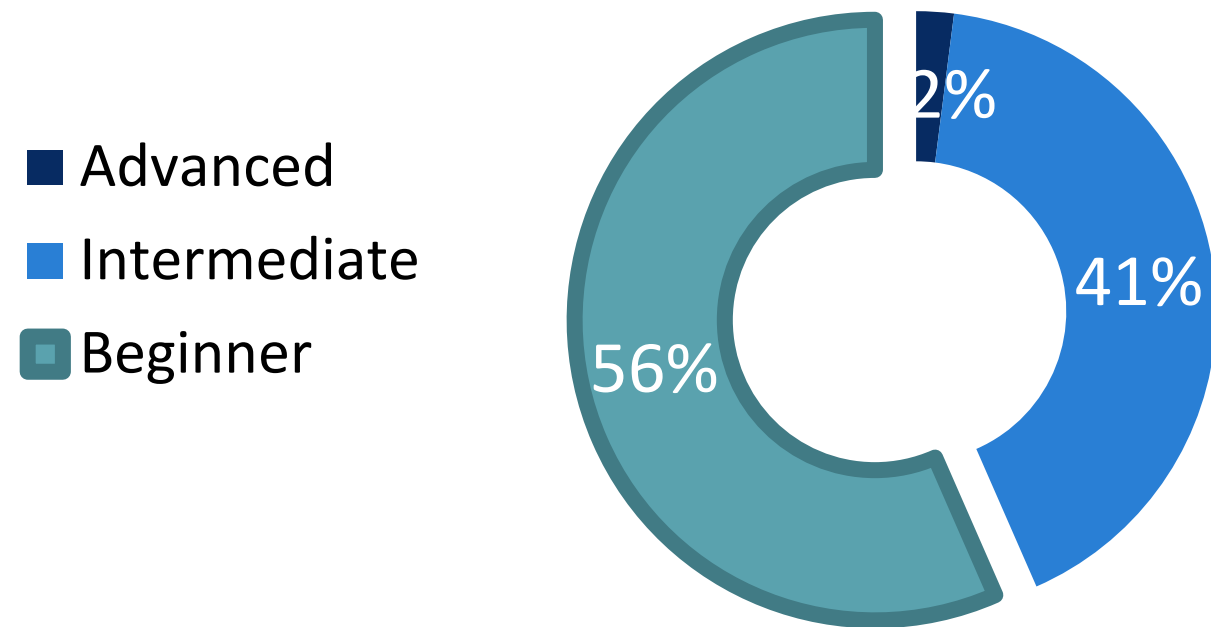
General discomfort

Tips to better cope with bugs, weather shifts and general discomfort with touching fish/ bait are welcomed



Skill Level

Current Fishing/Boating Skill Level



Beginner

Learning and often a newer interest. Realize still much unknown. Many lean on others for assistance.

Despite all the research I've done this summer I am still pretty clueless when it comes to fishing and rely on those around me to help a great deal!"

Intermediate

Have a fair understanding and capable. More confidence, but some gaps in knowledge and skills. Have most or all of gear needed.

I would definitely consider myself to be intermediate because I know what to do to catch fish and do pretty well all by myself, just for leisure.



Future Aspirations & Motivators



Master the basics

- For boating: **steering and maneuvering**, operations, **maintenance**, licensing, **safety guidelines** etc.
- For fishing: better at **casting, setting up**, picking locations, licensing, **and laws**.



Advanced aims

- **Staying relevant** on skills, new gear, and news
- **Learning from experts** and building techniques
- **Trying new things** (deep sea, larger fish, new areas).



Participating with others

Keep it social!

- Participation more with **more people**.
- Making **new friends** who are involved



Educational resources

People

- **Experts**, Boating club, Other **local** knowledgeable people

Organized events

- **Lessons, Local** fishing/boating **events** (networking), more hands-on experience

Online information

- YouTube, blogs, maps, online communities/ social media



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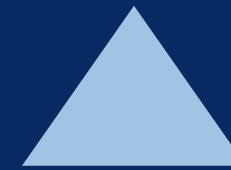
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Future Participation

	NEW ANGLERS	REACTIVATED ANGLERS	NEW BOATERS	REACTIVATED BOATERS
% Enjoy Fishing or Boating Extremely/ Very Much	85%	74%	87%	89%
% Extremely/ Very Likely to Continue Fishing or Boating	90%	86%	94%	82%

Boating and fishing are different from other activities in that...

Calming natural setting

*It's a zen kind of experience when boating or fishing because you are waiting, and you get so much time with your thoughts that it allows for a **relaxing** time."*

It's a challenge

- Excitement, an adventure (provides a high from the big catch)

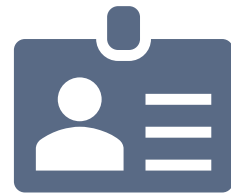
Conjures feeling of nostalgia & deep social connection

- Simpler times from the past
- Full family activity or with friends (other hobbies done independently)

*My other hobbies are very independent so its nice to go out on the water with friends and **be able to spend time together.***



Commitment & Investment



License

That 76% of new anglers report purchasing a license shows their commitment to trying the sport.

*Reactivated Anglers were more likely to not buy.



Boats & operation

And that 2 in 5 new boaters purchased a boat in 2020 with over half being operators shows future promise of participation.



Other gear

Over half of new anglers purchased gear from retail stores and online; some from second-hand channels.

Implications

Consumers have taken steps to begin investing in the sport. State agencies, dealerships and retailers need to **leverage what they know** about customers and tailor messaging – remind consumers of what they have, how they can use it, and share new news.

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Impacting Retention
Stakeholder Support



Impacting Retention

TRIAL

Where New Anglers and New Boaters are NOW

REPETITION

HOW TO MAKE FISHING AND BOATING A HABIT

HABIT

Where we want New Anglers and New Boaters to be

We understand habit formation by examining key elements of behavior which encourage repetition and lead to habits:

Cues

Consider the factors that served and will serve as cues to go boating and fishing

2021 cues will be different and rely on consumer-facing stakeholders (agencies, retailers etc.)

Barriers

Address behavioral and systematic barriers as the world evolves post-pandemic

New, emerging routines, reverting to old behaviors and experienced hurdles that go unaddressed

Rewards

Ensure rewards remain relevant and salient

Arm consumers with the tools to ensure rewards remain relevant and attainable



State Agency Support & Follow-up



60% of New Anglers were contacted about licenses

Only 25% of Reactivated Anglers were contacted about licenses



36% of New Anglers were contacted/provided educational information

Only 13% of Reactivated Anglers were provided educational information



31% of New Anglers were not contacted

69% of Reactivated Anglers were not contacted



Desired Fishing Content New & Reactivated

	NEW 2020 ANGLERS	REACTIVATED ANGLERS
➔ Different ways to fish	47% ↑	20%
➔ What types of bait I need	37%	35%
➔ Where to go to fish	36%	40%
What types of equipment I need	32%	25%
Types of fish available near me	24%	27%
Where to buy/rent fishing equipment	22% ↑	12%
Fishing regulations	19%	30% ↑
Where to go for information	15%	8%



Finding water access
close in proximity, free access



Expensive costs
affordable, second-hand gear, specials and deals on participation fees



How-to information
education on fishing, process to obtain license, how to get started



Desired Boating Content New & Reactivated

Less than half of New Boaters were contacted by Dealerships or State Boating Agencies about licensing and fewer were contacted with educational, safety information.

INFORMATION NEEDED

NEW 2020
BOATERS

REACTIVATED
BOATERS

How to drive a boat	34%	23%
What types of equipment I need	33% ↑	17%
Where to buy/rent boating equipment	28%	30%
The different types of boats	29% ↑	17%
Where to go boating	29%	39%
Where to go for information	11%	11%
Boating regulations	16%	23%



Finding access

to both boats and water, close in proximity and affordable



How-to information

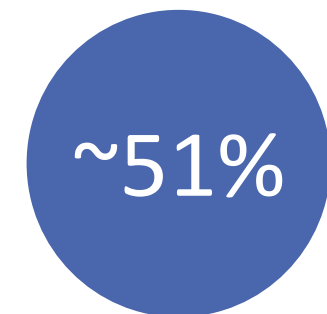
education on boating, process of registration, driving, steering, docking lessons, storage locations etc.



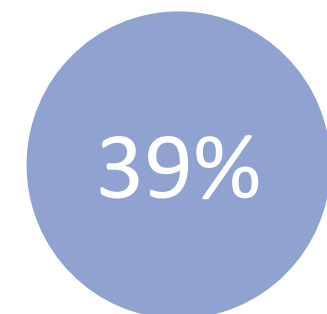
Where Was Equipment Purchased?

NEW ANGLER

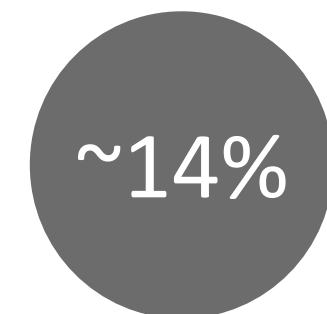
MORE COMMON
↑
↓
LESS COMMON



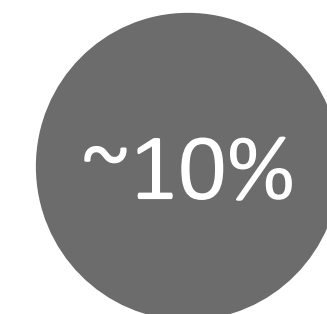
RETAILER PURCHASE



ONLINE PURCHASE



SECOND-HAND/USED



BORROWED



State Agency Partner Recommendations



Create a plan

Have a customer engagement plan in place to utilize as newcomers enter your agency or business and prioritize retention.



Educate

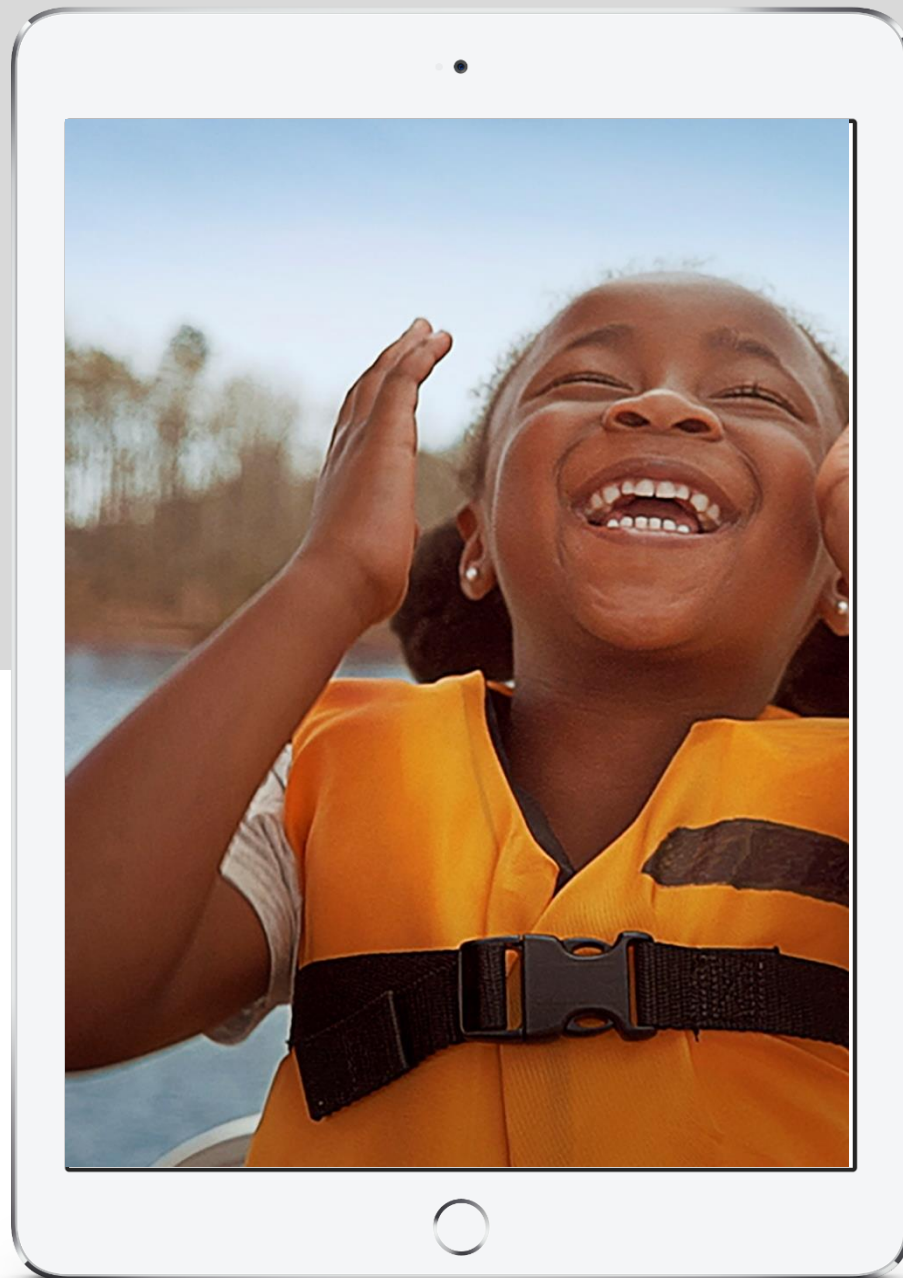
Consider alternate ways to educate newcomers. Introductions to the sports are not always fostered through family, friends for new wave of Newcomers.



Digital Engagement

Research findings and 2020 consumer insights support the value of focusing on digital properties to drive engagement.





www.takemefishing.org/WhosOnBoard

Fishing and boating had an extraordinary year; let's keep the momentum going! Visit our site for the full research study and other retention resources.



Research

Participation trends, market segmentation, first-time license-buyers information, infographics and more!



Content & Plugins

Information about what newcomers need and website plugins that make getting on the water easier.



An aerial photograph of a large, calm lake under a blue sky with scattered white clouds. In the foreground, a small, lush green island is partially submerged, with a small boat carrying several people on the water nearby. The background shows a dense forest of green trees along the shoreline. The word "Questions?" is overlaid in large white text, flanked by light blue L-shaped brackets.

Questions?

「Thank You」



News & Info:
News.takemefishing.org



LinkedIn:
Recreational Boating &
Fishing Foundation



Twitter: @RecBoatFish