CONSUMER TRENDS
885 million total fishing trips in 2016

2.5 million new fishing participants in 2016

11% increase in the number of Hispanics participating in fishing

3% increase in the number of youth ages 6–12 participating in fishing
New fishing participation stats

- Participation grew by 8.2% over five years
- Participation grew by nearly 20% in last 10 years
- Highest participation number since 1991

Boating participation


71.5 boating hours per season

17 million first-time boating participants in 2016

32% of first-time boaters were Hispanic

8.5 million first-time participants were children under age 18

NMMA. Recreational Boating Participation Study. 2016.
YOU’VE CHANGED

EMBRACE INCLUSIVITY
Older white men are aging out of fishing.

Americans 45+ are most likely to leave the sport.

45.3% of fishing participants are over the age of 45.

New fishing participants are more likely to skew younger and female.

45% of new fishing participants are female.

42% are ages 6 to 12.

Moms help increase participation.

85% of sons participated in fishing with their mothers, compared to 71% who participated with their fathers.

70% of daughters participated in fishing with their mothers, compared to 45% who participated with their fathers.

Hispanics tended to fish more often than the typical fishing participant in 2016.

3.8 million Hispanics fished at least once.

91.9 million days were spent fishing by Hispanics.

5.6 more outings were taken by Hispanics on average than the general fishing population.
Today’s Latina

77% Agree they like to be creative in the kitchen

18% Of households are single Latina parent households

Fishing is perceived as a male activity.

34% of males thought an angler looks like them, while only 19% of females thought the same.
In 2017, the most-purchased photo for the search term “woman” in Getty Image’s library is of a woman hiking alone in Banff National Park.
However, women in the fishing category are still objectified.
The outdoor category is no different.

72% of women say they feel liberated or free when they are outdoors, but only 32% describe themselves as “outdoorsy.”

63% of women say they cannot think of a female outdoor role model.

REI is putting women front and center

We'll tell stories of adventurers, makers and rule breakers. We'll close gaps in gear design. We'll bring women together outdoors with over 1,000 classes nationwide. Let's make outside the largest level playing field on earth.

Here's why
Empowering women in the outdoors: Why the white-hot interest?

What’s behind all the women-only trips, classes, social media campaigns? And how does it resonate in outdoors-centric Minnesota? Well, it’s complex.

By Sarah Barker Special to the Star Tribune | JUNE 29, 2017 — 6:10PM

REI Is Taking The Fight For Gender Equality Outside

CEO Jerry Stritzke talks about the brand’s new "Force of Nature" campaign to commit investments, product development, and marketing to get more women embracing the outdoors.

REI’s Force Of Nature Wants To Change The Game For Women Outdoors

Laura Heller, CONTRIBUTOR

Opinions expressed by Forbes Contributors are their own.

Let’s Talk About Women and Men and the Outdoors

New film addresses the complicated issue of gender relations and sport.
INCLUSIVITY & EQUALITY are at the forefront of today’s culture.
Opportunity: embrace inclusivity

How can we debunk stereotypes around fishing by portraying it as an activity that welcomes EVERYONE?
YOU’VE CHANGED
NEW FAMILIES
Family time continues to be a top reason for participation.

57.9%

“Be with family and friends” is why consumers participate in outdoor activities.

About half of parents characterize fishing and boating as appealing activities to do with their kids.
Almost **83%** of current adult participants were introduced to fishing during childhood.

The mean age of their first fishing experience was 10; **94%** had their first fishing experience before age 18.

**WARNING:** 62% of children age 6 to 12 did not participate in one outdoor activity in 2014.

First fishing experiences are rare after the age of 18 and virtually nonexistent after the age of 35.
Families have changed.

60% of parents with kids under 18 are millennials.

54% of families are non-traditional.

Families today have different tensions.

68% of millennial parents say they have it harder as parents than previous generations.

Fundamental tensions

- Everyone is doing everything
- The world is not an easy place
- Urban living vs. outdoor time
They’re looking for all the help they can get.

64% of millennial parents say the smartphone makes them a better parent, despite the guilt.

53% of millennial parents receive childcare from their own parents.

CEB Iconoculture Millennial Parents Survey, February 2017
Millennial parents are more experiential.

Values that rank higher compared to other parents:

Purpose
Creativity
Discovery
Hispanic millennials

91% use coupons and 81% decide where to shop based on whether they can use a smartphone or coupon.

Disney Channel prominence shows importance of family.
How to win with millennial families?

Make it easy
Commit to helping them survive
Make it real
Lose the labels and judgments
Embrace and celebrate real moments
Make it experiential
Give them experiences to share
Opportunity:
connect with new families

How can we engage new families by making fishing accessible, easy and approachable?
YOU’VE CHANGED

LEVERAGE PURPOSE
Fishing is part of a bigger purpose.

77% participate in fishing + another outdoor activity.

47% participate in outdoor activities to be close to nature.

Despite their love of nature, people today have less time to enjoy it.

- Americans work more than anyone in the industrialized world.
- 59% of millennials reported feeling shamed by colleagues over vacation days.
- The average person is now fitting 22 hours of media into a 24-hour day through multi-tasking across devices and platforms.
CULTURAL TENSION

The desire to live joyful and unconventional experiences to escape from routine

VS.

Longer working hours, longer commutes and decline of leisure time
Outdoor brands are leveraging purpose to get more people to enjoy, appreciate and take care of the outdoors by getting them closer to the actual experience and inspiring them to live today.
Opportunity: lead with purpose

How can we leverage our purpose to **inspire more people to get outside** and enjoy nature?
The average person is now fitting 22 hours of media into a 24-hour day through multi-tasking across devices and platforms.
Successful companies and brands listen to their audiences to stay one step ahead.

Key areas of focus:
• Video
• Partnerships
Video is a powerful and engaging storytelling force, undergoing constant innovation in both consumption and use by brands.

Current trends include:
• Live
• Built for mobile, social
• Data-driven
At the end of 2016, all major social platforms adopted a live video capability – some with support for 360 degree live video.

These videos are especially appealing due to their in-the-moment and vicarious nature.

Increases in production value, global distribution and targeted paid media will have all contributed to the expansion of live video.
As the majority of time spent on social is via mobile phones – and overall time spent on mobile is increasing – creating video tailored for social is an increasing priority.

The most successful videos:

• Grab attention within the first few seconds
• Remain relevant interesting even without sound, as many are consuming video silently

Facebook just announced that it will add :06 video ads to its offerings. YouTube introduced :06 ads in 2015.
Two major evolutions:

• Millennials are more likely than other generations to have multimedia devices and access to subscription video on demand – but 83% are still reached weekly by TV
• As an ad platform, TV has started to absorb many of the characteristics of digital advertising – especially its use of rich data and audience metrics

Digital video is often seen as an extension of TV, reaching consumers across screens.
Opportunity:

engage with personalized, social-first storytelling
The most authentic and successful collaborations are those which benefit both parties involved – and provide value to the audience.

Example: REI and *Outside* magazine came together to celebrate “the [female] athletes, activists and icons who have shaped the outside world.”

- Launched with an all-women issue of *Outside*
- Extended across channels via REI’s #ForceofNature campaign, including in-store

Example: GearJunkie teamed up with YETI to promote urban fishing, breaking down barrier that you have to travel far for a little escape. Especially as urban living continues to increase, up to 81% in 2010 compared to 79% in 2000.
Opportunity:
establish partnerships to build audience and credibility
FY19 CAMPAIGN
To support 60 in 60, we are focusing our target audience approach on embracing more inclusive audiences such as women, youth and Hispanics.
FY2019 Strategic Opportunity

Human Insight

“I love being outdoors as a way to bond with friends and family, but fishing isn’t for someone like me.”

Strategic Opportunity

Fishing and boating is where you belong.

Brand Purpose

We believe the most meaningful experiences in life are shared outside, so we exist to spread the joy of fishing and boating to all ages, genders and cultures.
### BUSINESS CHALLENGE

RBFF has been successfully working toward the 60 in 60 goal (60M new anglers in 60 months) for a year, and we want to continue that momentum moving forward into next year by focusing our efforts on the three-pronged approach: recruitment, retention and reactivation (R2) approach to fishing participation.

We want to increase awareness and consumer engagement in recreational fishing and boating by recruiting new audiences to the sport through a national marketing and communications campaign designed to encourage consideration, trial and ultimately participation. We want to grow the number of anglers and boaters by working in collaboration with state agencies and partnering with industry manufacturers and retailers to develop and implement marketing projects designed to increase category growth (as the expression goes: *a rising tide lifts all boats*). The challenges we currently face are that the audience that fishing has traditionally attracted is aging out of the sport, families are increasingly becoming non-nuclear, and technology and time have made other forms of leisure and outdoor activities more appealing as a result of convenience.

We have an opportunity to overcome these challenges by focusing on efforts that attract the modern family, embracing more inclusive audiences such as women, children and Hispanics and using our brand purpose in an interesting and disruptive way that leverages emerging technologies rather than fighting against them.

### AUDIENCE

We want to reach an inclusive audience of women, Hispanics and modern families. Most of those not involved in fishing and boating activities do not participate because they just don’t believe fishing and boating are for them and can’t see themselves (or people like themselves) fishing and boating. A majority of new participants in fishing are women; unfortunately, women are also more likely to taper out of fishing. Hispanics are a growing part of the American population and continue to shape the emerging American culture. The definition of the nuclear family is also shifting, and children who fish with their parents are significantly more likely to become active anglers, especially those who fish with their mothers. All of these audiences present an opportunity for recruitment and retention as we redefine what it means to be an angler in today’s world.

### HUMAN INSIGHT

I love being outdoors as a way to bond with friends and family. Fishing isn’t for someone like me.

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### STRATEGIC OPPORTUNITY

Fishing and boating is where you belong.

### BRAND PURPOSE

We believe the most meaningful experiences in life are shared with others. Fishing and boating bring the joy of fishing and boating to all ages, genders and cultures.

### THE ENEMY

Stereotypes and misperceptions, including:
- It’s not for someone like me.
- It’s for old, white men.
- It’s for people who have more time.
- It’s for people who have more money.
- It’s boring.
- I don’t even know where to start.

### RTB (REASONS TO BELIEVE)

- It’s not for someone like me.
- It’s for old, white men.
- It’s for people who have more time.
- It’s for people who have more money.
- It’s boring.
- I don’t even know where to start.

### DELIVERABLES

Two platform directions that encompass the following deliverables:
- **Marriage**
- **Tagline**
- **Print and digital-like object**
- **Video execution**
- **In-market experiences**
- **Partnerships**

### MANDATORIES

- **RBFF brand standards**
- **Legal**
- **Logos**
- **Consistent look and feel with existing campaign elements**
- **Slogan to stay away from using “on the water”**

### TEAM

**Strategy:** Pierce, Bush  
**Account:** Cleary, Lernert, Jerrick  
**Project manager:** Tolle  
**Creative:** Black, Dietz, Ferrara, Attellera  
**Media:** Moore, Smith, Talajowski  
**Public relations:** Foxgen, Aldenberg, Kastner

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### WHAT DO WE WANT PEOPLE TO DO?

Increase fishing participation in conjunction with our 60 in 60 goal. Feel motivated to register for their fishing license and make fishing one of their top leisure activity considerations.

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### BRAND creative brief updates recognize the goals to:

- Be even more proactive  
- Emphasize “do, not say”  
- Focus on being highly inclusive  
- Guide teams to come up with great partnerships and experiential ideas

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