



Ipsos Presentation:
**New Anglers and Boaters and
What They Mean for You**



DECEMBER 15, 2020

Agenda

01 – Introductions & Research Overview

02 – Who are New Anglers & Boaters

03 - Participation

04 - Barriers

05 – Commitment

06 – Engagement



Stephanie Don

Senior Account Manager

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



Andrea Greaves

Qualitative Specialist & Moderator

With over 20 years of experience engaging clients and consumers across the globe – Andrea brings a human element to every business question. Her favorite fishing spot is Minong, WI, boating spot is Skaneateles Lake, and her favorite boats are antique wooden Chris Crafts.



We are an independent company, owned and managed by research professionals.

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 from major Fortune 500 companies to governments, to innovative start-ups.

New Anglers & Boaters Consumer Participants

 Jennifer

 Evelyn

 Johnny

 Paul L.

 Paul M.

What We Did



Quantitative research

- 15-20-minute, device agnostic, online survey, fielded from September 23rd – 30th; we ‘spoke’ to over 1,000 consumers and over 600 Newcomers
- Covered topics of engagement with fishing and boating, motivation and barriers, typical trip context, procedures, targeting information
- Considered behaviors in the context of forming habits & to better predict evolving consumer actions



Community illumination

- Short-term community with 3 qualitative, sequential discussion boards among New Boaters/anglers (Newcomers) and Active Social Families from October 9th – 19th
- Illuminated quantitative findings and garnered learnings around gear and equipment



Key Learnings

Who they are

Segment alignment
Key demographics
Motivators

Participation

Why fishing/boating
Emotional connections
Adjacent activities

Barriers

Former barriers
Experienced barriers

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Content themes
Stakeholder Reach-out
Support



Previous Research

POTENTIAL GROWTH TARGETS FOR RBFF (2019)

	AVID ADVENTURISTS	ACTIVE SOCIAL FAMILIES	FAMILY-FOCUSED RELAXERS
			
HIGH INTEREST	✓	✓	✓
DESIRABLE BEHAVIORS	✓	✓	✓
DESIRABLE ATTITUDES	✓	✓	✓
Size of the Growth Prize	5.5 MM Potential New Fishers 7.4 MM Potential New Boaters	14.8 MM Potential New Fishers 17.6 MM Potential New Boaters	12.7 MM Potential New Fishers 15.2 MM Potential New Boaters
Challenges/Opportunities	Strong enjoyment of fishing/boating to fuel adventure needs but competing with a variety of sports for share of time. Opportunity to grow alternative fishing types (ice, fly)	Strong interest in and enjoyment of fishing and boating – lots of benefits received from participating allows for marketing potential and large group of potential participants	Some interest in fishing boating for leisure/relaxation makes this group strong secondary target

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.

2 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).

Size of Prize calculated based on consumers 18-54, self reporting



Key Demographics



	 NEW ANGLERS	 REACTIVATED ANGLERS	 NEW BOATERS	 REACTIVATED BOATERS
DEMOGRAPHICS				
Male	59%	43%	63%	30%
Female	41%	57%	37%	70%
18-34	47%	27%	45%	36%
35-54	53%	73%	56%	64%
% Hispanic	15%	5%	16%	6%
HOUSEHOLD COMPOSITION				
% Kids under 18 in HH	73%	51%	70%	52%
Kids under 5	25%	11%	23%	23%
Kids 5-12	74%	44%	69%	40%
Kids 13-17	22%	21%	24%	21%
REGION				
Northeast (Net)	24%	18%	24%	24%
Midwest (Net)	19%	23%	19%	31%
South (Net)	38%	42%	32%	37%
West (Net)	18%	16%	25%	8%
TYPE OF TOWN				
Rural	17%	23%	17%	25%
Suburban	29%	50%	28%	48%
Urban	55%	27%	55%	27%

Findings

Compared to the general U.S. population, new anglers and new boaters are **younger** (25 – 34), more likely to be **Hispanic**, have **kids in the household**, and 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.**

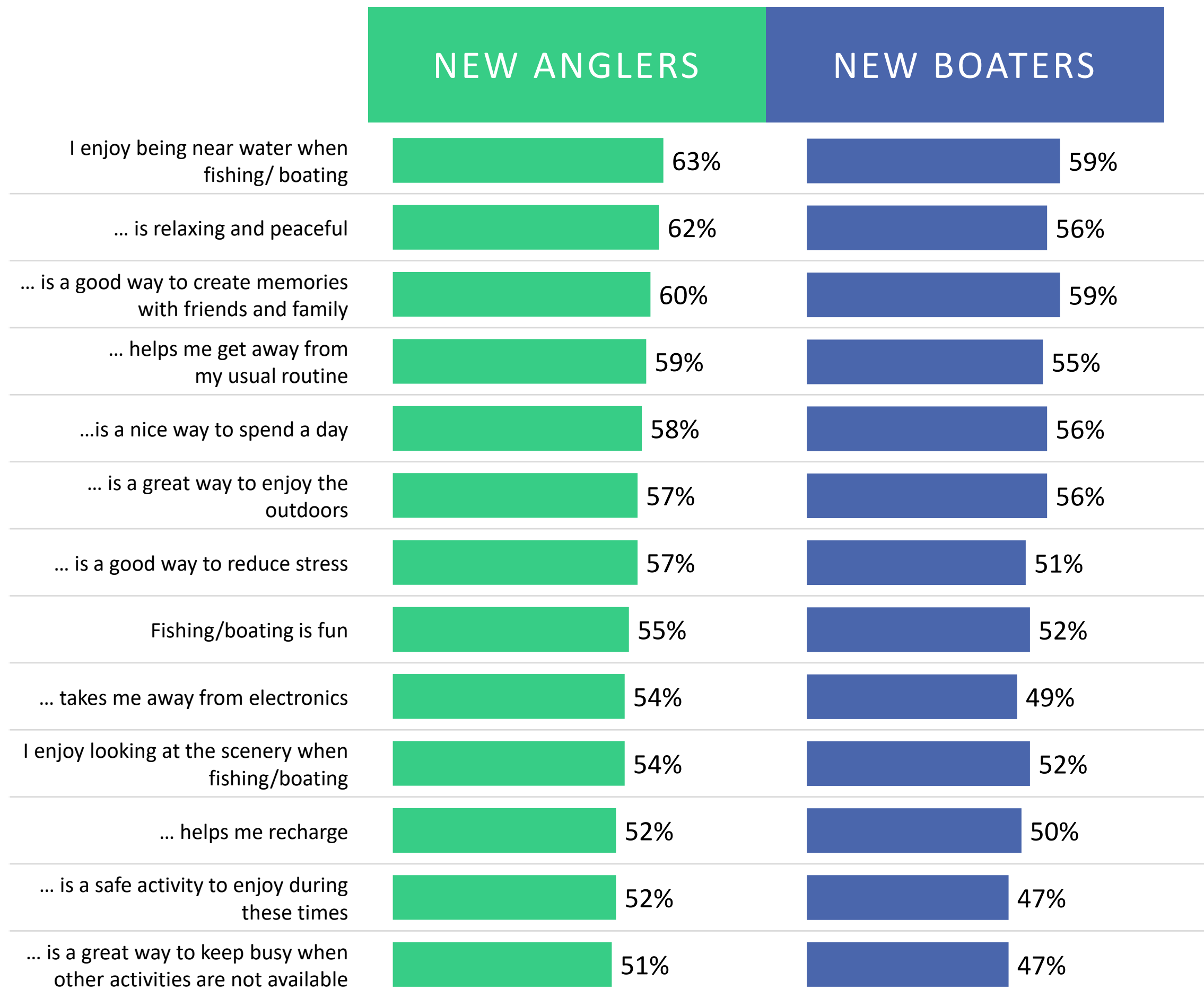
Why Fishing & Boating

*[We fish for] **time** with family and friends. Opportunity to make **new memories**, and to have new adventures together. To **enjoy** and **savor** the time outdoors. To **slow down** and **step away from the screens and the stress**. To remember the **cherished memories** of the past and to laugh about what has been.”*

Implications

Continue to message similarly as was done for ASFs and continue to incorporate these motivators.

Especially during this chaotic time in the world, peace and relaxation are scarce.



A photograph of two men sitting in folding chairs on a sandy shore next to a body of water. They are both wearing grey t-shirts and blue jeans. The man on the left is smiling and looking towards the man on the right. Several fishing rods are set up on the shore in front of them. In the background, there are trees and a house on a hillside under a twilight sky. The text 'Let's Hear from Our Consumers' is overlaid in the center in a white, sans-serif font, enclosed in large white brackets.

「Let's Hear from
Our Consumers」

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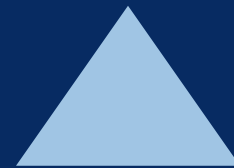
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Why Fishing & Boating NOW

Invitations

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

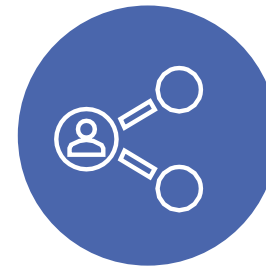


Extra time

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



Children

“This summer my young children both expressed interest in fishing and with everything else closed due to Covid-19 in our area it seemed like a perfect time to try it out.”

Consider how to appeal to kids knowing they are little family influencers



Invitations

“The same buddy’s lake house that I fished at this Summer is the one that my wife and I boat with when we visit him in the Summer and/or Fall.”

Highlight the ability to ‘connect’ – with others, with nature etc.



Time

“What kept me from fishing earlier was that I was busy with social engagements, happy hours, parties etc..”

Consider encouraging tactics to ensure boating and fishing remain top of mind as other activities compete again



Social distancing

“There was plenty of distance since the national park was still doing reservations and limiting passes. It was a very chill environment ...a lot of people were tired of being cooped up and grateful for being outside.”

Showcase and reiterate how it is a safe way to socially connect in times of uncertainty

Adjacent Activities



% ONLY FISHING

% ONLY BOATING

16% (New)
vs 36%
(Established)

4% (New)
vs 14%
(Established)

Rank-order

“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

“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

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, coffee (some)
- Sunny, warm weather
- Everyone being ready on time (can be a point of tension)

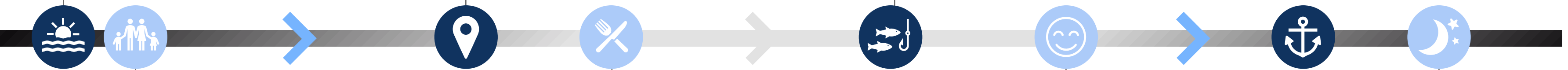
We will go out on the nearby lake, so that we can enjoy the familiar but also the beauty that is so close to our city."

WHERE

- Often a **nearby body of water** (ocean, lake, river, creek, etc.),

ACTIVITIES

- Listen to music
- Water sports (swim, pier jumping, ride jet skis, etc.)
- Boating
- Fishing (some prefer to catch many, some are unconcerned)
- Meals (some want to cook fish caught)
- Relax
- Watching fireworks
- Camping
- Sighting of aquatic wildlife
- Hiking
- Sunbathing



THE SQUAD

- Common to go with friends, but family is most common.

SUPPLIES

- Items for Meals
 - Drinks (soda, energy drinks, alcohol)
 - Snacks (chips, cookies, sweets, jerks, etc.)
 - Sandwiches
- Entertainment
 - Electronics
 - Phones, tablets
 - Speakers (often Bluetooth)
 - Gaming devices
 - Chargers, fully-charged batteries on all devices
 - Games (dominoes, cards, etc.)
 - Books Fishing/boating gear
- Miscellaneous items
 - Cooler
 - Blankets
 - Firearm
 - ATV
 - 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, but more likely to end earlier in day than ASFs

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



A serene outdoor scene featuring a tent on the left, a person sitting on a yellow kayak, and a person standing with a fishing rod. The background is a dense forest of evergreen trees reflected in a calm lake. The text "Let's Hear from Our Consumers" is overlaid in white, flanked by blue L-shaped brackets.

Let's Hear from Our Consumers

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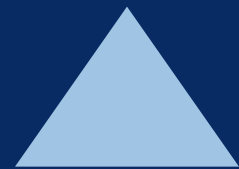
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Former Barriers

Findings

Fishing and boating in the summer of 2020 took the **place of other activities** that formerly took priority.

Lack of interest had been a huge barrier for new anglers prior to this year.

Implications

Keep these barriers in mind during the upcoming seasons and consider how the evolving pandemic & restrictions will impact these factors.

Highlight aspects that can directly combat these 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

Findings

Hurdles directly related to the **level of experience** can prevent newbies from continuing the sport – things like tangled lines, getting lost, maneuvering a boat and easily finding information to help.

Implications

Information on the **most basic aspects** is important to this new group.

Highlight even things that seem obvious, and direct newbies to content to aid in solving for common problems.



User experience

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



Information accessibility

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

A family of four is enjoying a fishing trip by a lake at sunset. The father, wearing a light blue shirt and khaki shorts, is helping a young child with a fishing rod. The mother, in a striped shirt and shorts, is smiling. Another child in a blue dress and hat is also fishing. The scene is peaceful, with the sun setting in the background and reeds on the right.

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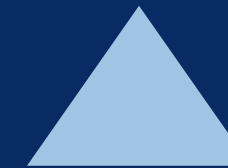
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Future Participation

	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

- Relaxation
- Patience
- Mindful, Zen presence
- Disconnection from hectic daily life
- Space to think
- Leisurely vibe
- Balance



*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

- Simpler times from the past

Deeper social connection

- 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.***



Future Motivation

Findings

While some new anglers/boaters mentioned life stage changes like children getting older or retirement as future motivators, a shared ambition to **advance knowledge and ability** are key to maintaining newcomers overall.

Implications

These ambitions represent content marketing topics to elevate.

Highlight **boat safety**, catching specific fish species, baiting and casting **tips**, location finding, trying different water types etc.

Encourage **relationships** and sharing between established and advanced participants with newbies.



Master the basics

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



Advanced aims

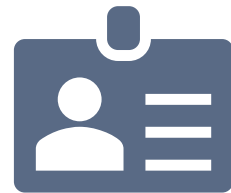
- Staying relevant on skills, new gear, and news accounting for all possible things while fishing (water type, weather, situational factors etc.)
- Learning from experts and building techniques; teaching others



Other goals

- Participation more with more people
- Trying new things (deep sea, larger fish, new areas)

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.

A photograph of two fishermen sitting on a rocky shore, fishing in a lake. The scene is captured from behind them, showing their fishing rods extending into the water. The lighting is soft, suggesting early morning or late afternoon. The text 'Let's Hear from Our Consumers' is overlaid in white, framed by light blue brackets.

Let's Hear from
Our Consumers

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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

State Fish & Wildlife Agency Contact



60% of New Anglers were contacted about licenses; only 25% of Reactivated Anglers were

INFORMATION SHARED:

“How to get a license and the requirements”

“The benefits of buying a license”

“The rules and how to get my license”



36% of New Anglers were contacted with educational information; only 13% of Reactivated Anglers were

INFORMATION SHARED

“An important statement about the importance of having all documents online”

“Updated policies”

“Information about laws and details associated with the fishing process”

“The contact information and safety guidelines”

“Important information about fishing”

“Safety procedures, the rules and laws of fishing in my area”



31% of New Anglers were not contacted while 69% of Reactivated Anglers were not contacted

Implications

- Consider how to re-reach out with reminders or season opener kits or something creative and motivating to encourage continuation in 2021.
- Contact Reactivated Anglers, they were significantly more likely to not purchase a license this season (32% vs 23% New)
- Continue to leverage email and social media as that is how newcomers want to be contacted most.



Fishing Content to Share

	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



Boating Support & Content

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



Retailer Support

Retailers Commonly Shopped for Gear



NEW ANGLER GEAR ACQUIREMENT

RETAILER PURCHASE

~51%

ONLINE PURCHASE

39%

SECOND HAND/ USED

~14%

BORROWED

~10%



Findings

For physical retail, Dick's Sporting Goods was a go-to for safety, selection and service. For online retail, Amazon is a go-to for selection and ease.

New Anglers were hesitant to invest more than \$100, however once more engaged, investment increases.

Implications

- e-commerce and **educational** digital/app content
- Consider curating **gear sets** by skill level in physical stores
- Provide **at-shelf educational displays** to help newcomers navigate the selection and find the gear they need
- **Smart search** and content strategies
- **Brands can build relationships** with new Anglers by appealing and meeting needs



Essential purchases

Fishing rods/ reels, tackle, accessories
Kayaks or boats
Accessories (fish finder, mirrors, camera etc.)
Proper clothing



Investment barriers

Visiting/ away from home
Trial before purchase
Not enough participation
Unknown future participation
Expensive/ easy to rent

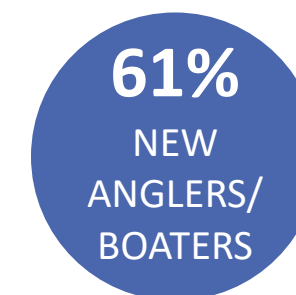


Motivating tactics

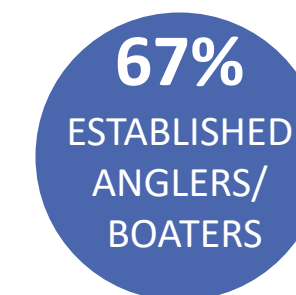
Sales, coupons, promotions
Justifying expense

- Increased participation
- High enjoyment

SPENT
UNDER
\$100



SPENT
OVER
\$100



My friends who have boats also have fishing gear. Gear is expensive so I need to make absolutely sure it's something I want to do on a semi-regular basis before I drop a ton of money."

Prized Possessions

Many prized possessions related to fishing and boating are cherished for their sentimental value—who they came from, where it has been, how long it has been a trusty instrument.

*My most prized possession of my fishing gear is my **grandfather's fishing rod**, Hardy brand. I use it from time to time because I don't want it to get damaged. Actually, it is not very expensive maybe it costs about \$50 but it is very valuable to me."*

*So, I splurged a little bit and got a Pflueger President graphite rod/reel combo at Cabela's last year, lightweight yet durable. **No sentiment, just function.**"*



Prized Possessions

MORE COMMON

- Fishing rod/reel
- Lures
- Tackle box
- Boat (less common among NCs)

LESS COMMON

- Pocket knife
- Wakeboard
- Binoculars
- Compass
- Rod rack
- Clothing, hat
- Fish finder



Why Prized

- Sentimental
 - Reminds them of children and their excitement receiving
 - Gift from relative (father, grandfather, uncle, etc.), often first one owned
 - Passed down from relative
- Brings luck
- Owned for long period of time, enjoyed time with it
- Pride, upgrade from previous gear owned
- Works well, reliable, etc.



Engaging Consumers & Encouraging Repetition

Communications

Remind newbies of the great experiences boating and fishing in 2020 & how they were able to bond

Continue to reach ASFs and newbies on relevant channels (email and social) and consider media on streaming sites such as Netflix, Hulu and Disney+.

Amp up the social aspects

- Event calendars, Facebook groups locals
- Support: online and IRL
- Incentivize new participants to form and reinforce their own social bonds
- Promote group discounts or packages.

Retailer

Leverage what you know about customers; contact those who made a purchase

- **Friendly reminders** “don’t let your purchase go to waste!”
 - Via email and/or social
- Sales
- New/upgraded gear
- Information on how to use their purchase
- Lessons
- Accessories or gear to make the process easier (mirror extenders, underwater cameras etc.)

Small Shops – highlight your expertise and services

Industry

Highlight convenient, local areas

- Next year, free time will likely be competing with other activities and obligations

Ensure resources are available, top of mind and easy to find

- Information on licensing, registration and policies
- Training sessions, webinars, classes on fishing techniques or boating operation
- Include kid-friendly content

Help improve the user experience:

- Have experienced Anglers and Boaters share tips and tricks
- Consider networking events
- Highlight technology to make fishing trips more productive.



A photograph of fishing equipment on a wooden dock. Two fishing rods with reels are the central focus. The reel on the left is red and silver, while the one on the right is silver. The rods have cork handles. To the left of the rods is a white lure with a red spot. To the right is a red and yellow lure. The background is a body of water with ripples. The entire image has a blue color overlay.

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Stakeholder + Industry 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.



RBFF Next Steps



FY22 Campaign

Research findings will inform FY22 consumer outreach; Board to review plan at January Board Meeting.



Toolkit Survey

Keep an eye out for brief survey later this week to inform RBFF toolkit creation.

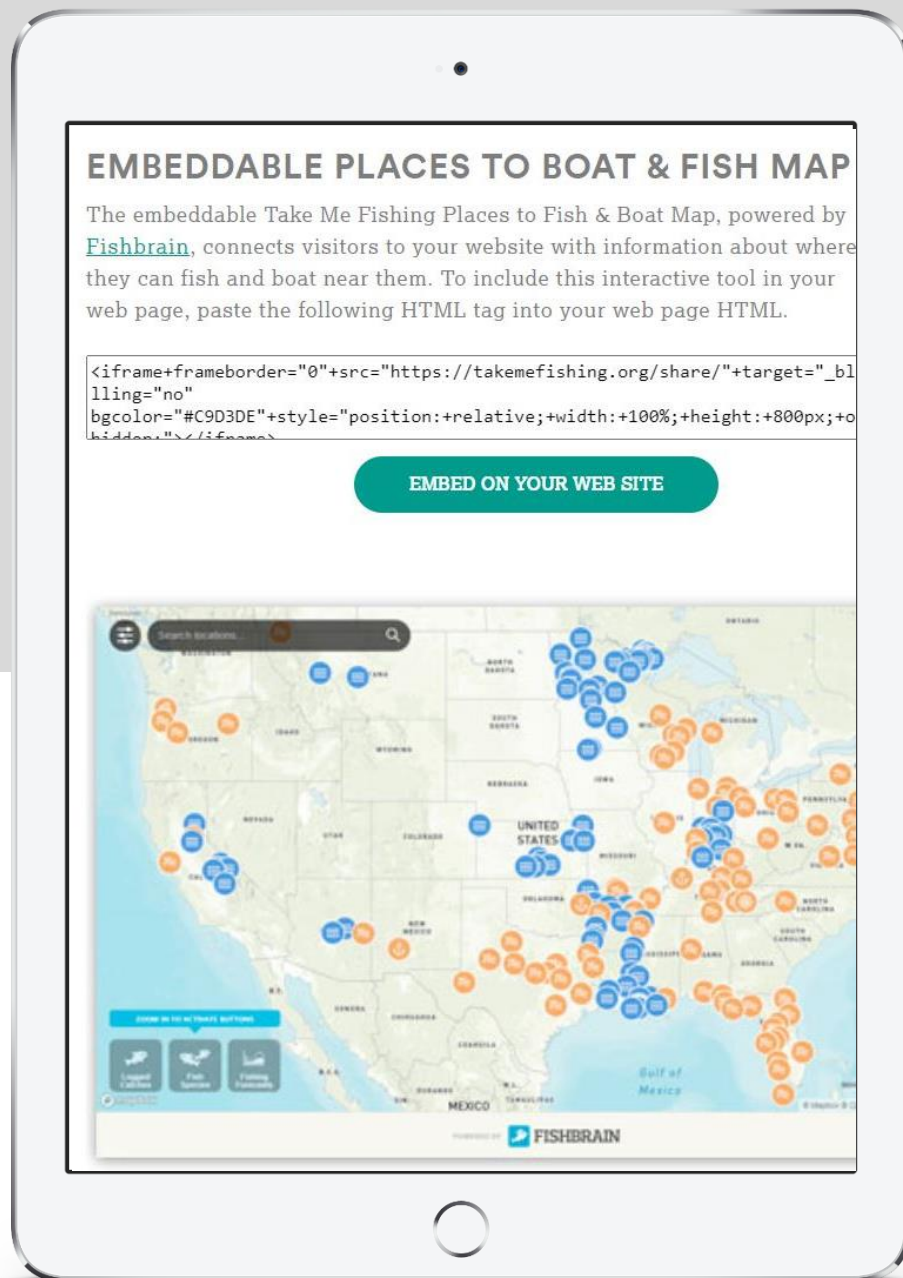


Stakeholder Toolkit

Retention toolkit for state and industry stakeholders being developed in partnership with NMMA & MRAA; Available in late February.



Retention Resources Available Now



www.takemefishing.org/RetentionToolkit

Existing RBFF resources to help you retain new customers including research, content, and website plugins that give your customers direct access to fishing license information and places to fish and boat near them.



Research

Participation trends, market segmentation, first-time license-buyers information 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 the center in a large, white, sans-serif font, flanked by light blue L-shaped corner brackets.

Questions?

「Thank You」



News & Info:
[News.takemefishing.org](https://www.news.takemefishing.org)



LinkedIn:
Recreational Boating &
Fishing Foundation



Twitter: @RecBoatFish