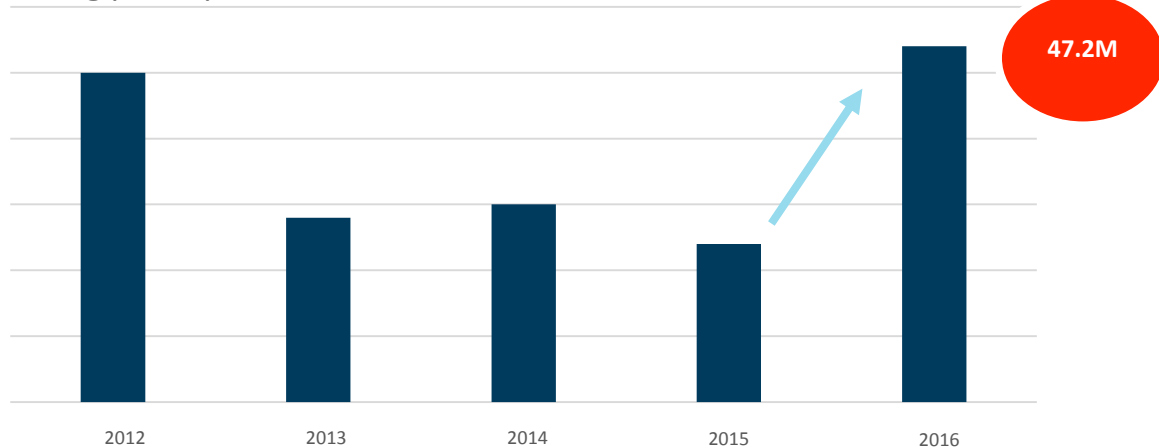


CONSUMER TRENDS





Fishing participation



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



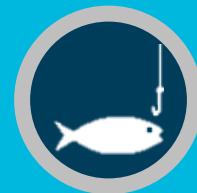
New fishing participation stats



Participation grew by 8.2% over
five years



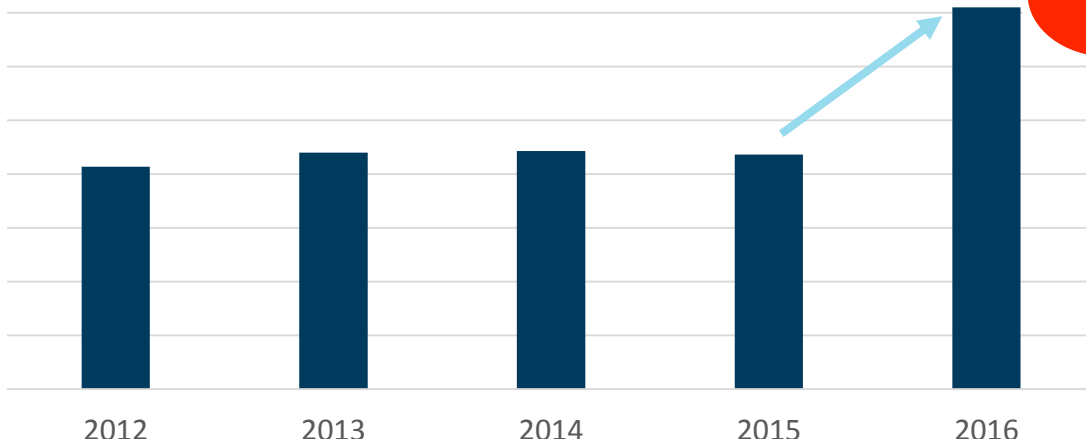
Participation grew by nearly 20%
in last 10 years



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





**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.

A photograph of a family of three (a man, a woman, and a child) fishing from a pontoon boat on a calm lake. The scene is set against a backdrop of a cloudy sky and a line of trees in the distance. The text is overlaid on the right side of the image.

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.

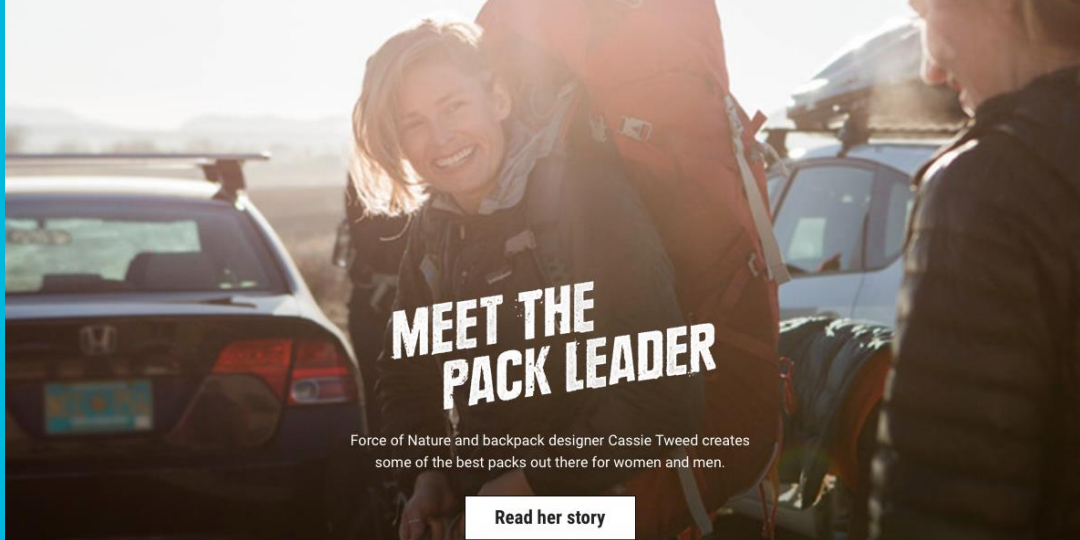


However, women in the fishing category are still objectified.

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.



Force of Nature and backpack designer Cassie Tweed creates some of the best packs out there for women and men.

[Read her story](#)

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



Let's Talk About Women and Men and the Outdoors

Let's Talk About Women and Men and the Outdoors

New film addresses the complicated issue of gender relations and sport.

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.



APR 3, 2017 @ 01:53 PM

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



Laura Heller, CONTRIBUTOR
FULL BIO

Opinions expressed by Forbes Contributors are their own.





**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.



WARNING:

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



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.



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.



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

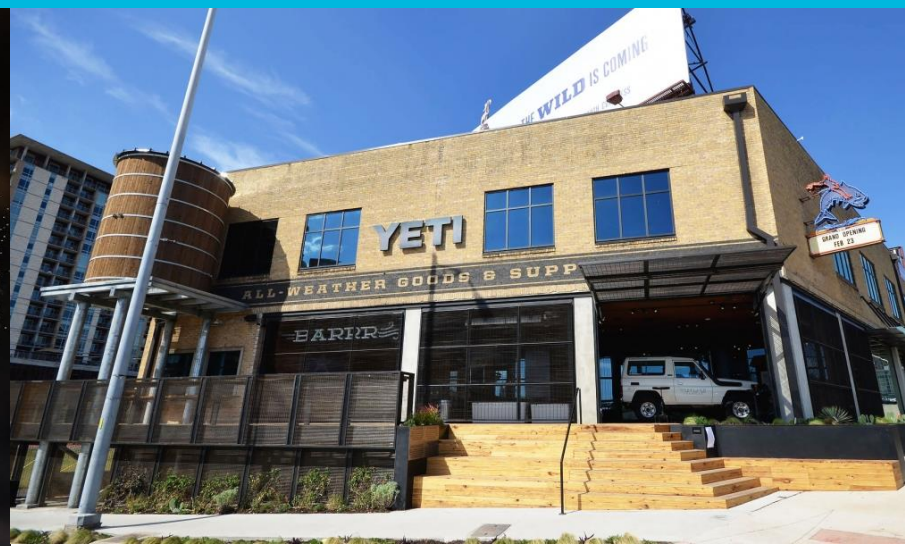
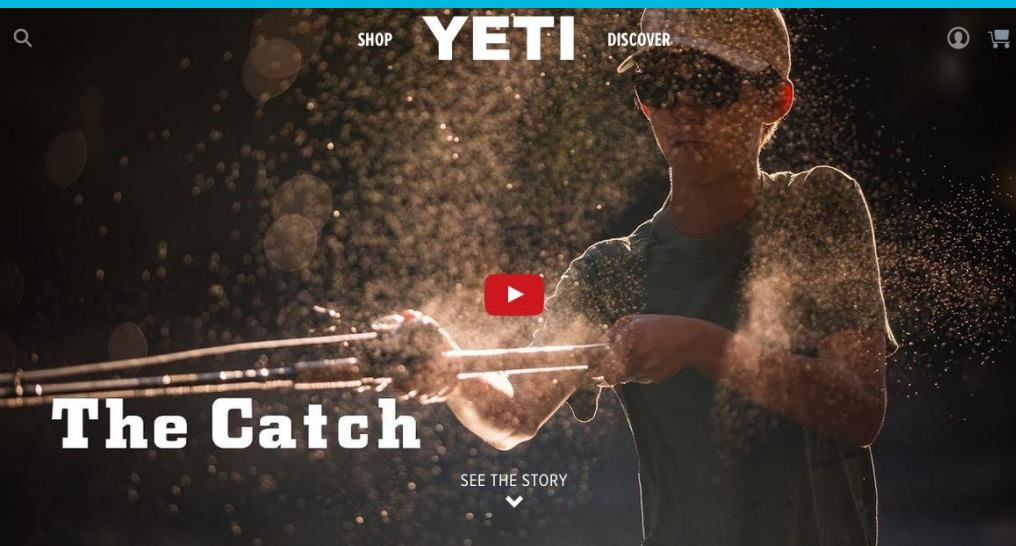
Lose the labels and judgments

Embrace and celebrate real moments

Make it experiential

Give them experiences to share

YETI®







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.

A person's hands are visible holding a green sign with white text and graphics. The sign is held against a blurred background of mountains and a cloudy sky. The text on the sign is written in a casual, hand-drawn style. There are small tree icons interspersed with the text.

Will
you
GO OUT
WITH
ME?

#OPTOUTSIDE

WE'RE NOT HERE

TODAY WE'VE CLOSED ALL 143 OF OUR STORES

We're passionate about bringing you great gear and the experience it unlocks. We hope you'll join us outside today. You can still shop our site. We'll start on your order first thing Saturday morning. #OptOutside

[Join us outside](#)

[Continue to REI.com](#)

Opportunity: lead with purpose

How can we leverage our purpose to inspire more people to get outside and enjoy nature?



CONNECTION

A composite image showing a family in a living room. In the background, a woman sits on a sofa holding a remote, a child sits on the sofa, and a man sits on the floor. A television in the background shows a green landscape. In the foreground, a close-up shows a person's hands holding and using a smartphone.

REACHING
TODAY'S
CONSUMER

The average person is now fitting
22 hours of media
into a 24-hour day

through **multi-tasking** across devices and
platforms.



**WHAT'S NEXT FOR
2017 AND
BEYOND?**

Successful companies and brands listen to their audiences to stay one step ahead.

Key areas of focus:

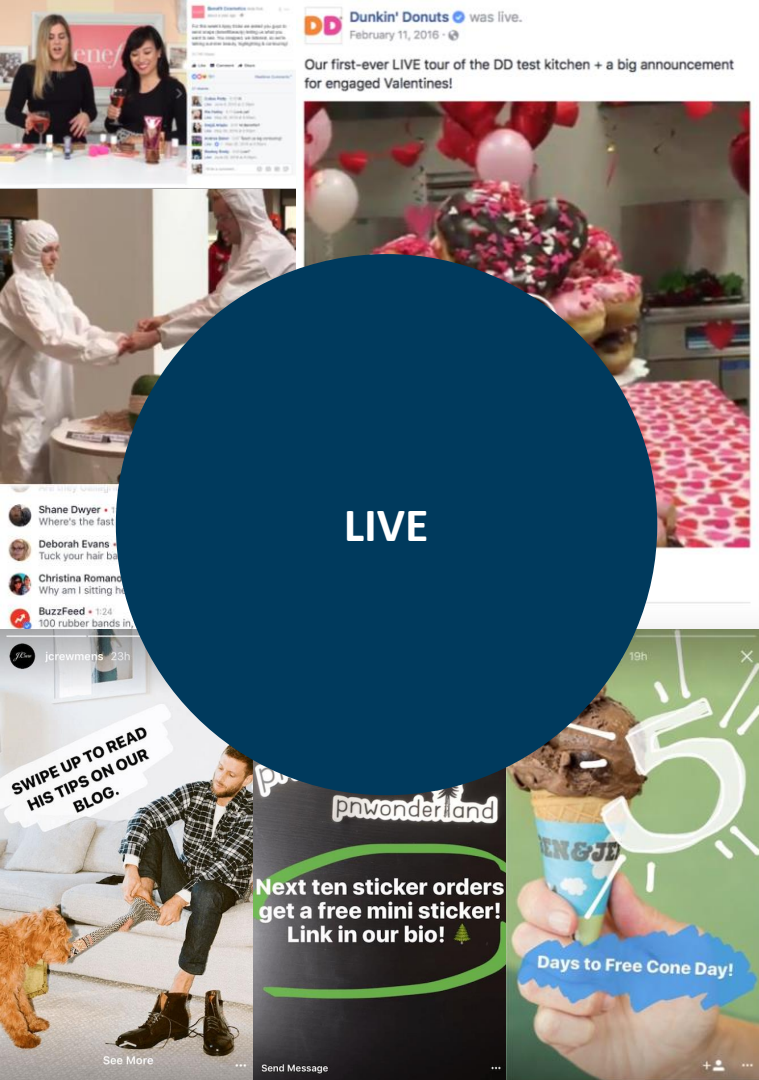
- Video
- Partnerships



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.

SOCIAL FIRST

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.



DATA-DRIVEN



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.

Y YETI shared GearJunkie's video.
22 hrs · 🌐

162 species of fish. 10 days. The ultimate urban angling challenge.



85,606 Views

GearJunkie with YETI.
23 hrs · Paid · 🌐

Grander Slam: catch 18 fish species right downtown.

Like Page

Like Comment Share

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.

CLIENT	PROJECT NAME	JOB #	BUDGET (OOP FEES SEPARATE)	KICK-OFF DATE	IN-MARKET DATE
Recreational Boating & Fishing Foundation	RBF FY2019 Brand Campaign	60599	TBD	08/23/2017	TBD

<p>BUSINESS CHALLENGE</p> <p>RBF has been effectively 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 recruitment, retention and reactivation (R3) 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.</p> <p>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.</p>		<p>WHAT DO WE WANT PEOPLE TO DO?</p> <p>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.</p>	
<p>AUDIENCE</p> <p>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 lapse 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.</p>		<p>DELIVERABLES</p> <p>Two platform directions that encompass the following deliverables:</p> <ol style="list-style-type: none"> 1. Manifesto 2. Tagline 3. Print and digital like object 4. Video evolution 5. In-market experiences 6. Partnerships 	
<p>HUMAN INSIGHT</p> <p>"I love being outdoors as a way to bond with friends and family, but fishing isn't for someone like me."</p>	<p>STRATEGIC OPPORTUNITY</p> <p>Fishing and boating is where you belong</p>	<p>BRAND PURPOSE</p> <p>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.</p>	<p>MANDATORIES</p> <ul style="list-style-type: none"> <input type="checkbox"/> RBF brand standards <input type="checkbox"/> Legal <input type="checkbox"/> Logos <input type="checkbox"/> Consistent look and feel with existing campaign elements <input type="checkbox"/> Slogan to stay away from using "on the water"
<p>THE ENEMY</p> <p>Stereotypes and misperceptions, including:</p> <ul style="list-style-type: none"> <input type="checkbox"/> It's not for someone like me <input type="checkbox"/> It's for old, white men. <input type="checkbox"/> It's for people who know what they're doing. <input type="checkbox"/> It's for people who have more time. <input type="checkbox"/> It's for people who have more money. <input type="checkbox"/> It's boring. <input type="checkbox"/> I don't even know where to start. 	<p>RTB (REASONS TO BELIEVE)</p> <p>Boating and fishing offer more than what you thought possible.</p> <ul style="list-style-type: none"> <input type="checkbox"/> Offers learning experiences. <input type="checkbox"/> Offers excitement and novelty. <input type="checkbox"/> It's an activity that brings friends and family together. <input type="checkbox"/> Anyone can do it. <p>TakeMeFishing.org has the right knowledge and relevant information for every kind of angler.</p>	<p>BRAND PERSONALITY</p> <p>Motivational Inspirational Inclusive Adventurous</p> <p>Archetype Explorer</p>	<p>TEAM</p> <p>Strategy: Pazos, Bush Account: Olson, Prestrud, Jerrick Project manager: Tofté Creative: Black, Ziebek, Ferrara, Abellera Media: Moore, Smith, Talajkowski Public relations: Negrin, Niebling, Kaufman</p>

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**

