



CASTING A WIDE NET

IDENTIFYING NEW ANGLERS & BOATERS AND DETERMINING TACTICS FOR RETENTION

REPORT, NOVEMBER 2020



TAKEMEFISHING™.org



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BACKGROUND

Due to a spike in fishing and boating license requests in the 2020 season, RBFF was interested in conducting research to understand Newcomers to the sport.



THE CORE OBJECTIVES OF THIS RESEARCH WERE TO:

- ❖ Learn where Newcomers fall in the segmentation, or if there are unique attitudes and motivations that discern them and other segments better.
- ❖ Identify the motivations and situations that encouraged trail in the activities.
- ❖ Probe among these newcomers with respect to enjoyment in the sport, experiences, trip details, behaviors related to purchasing gear and monetarily investing and general perceptions of their experience.
- ❖ Predict and plan for the potential barriers Newcomers may experience as personal situations evolve in relation to the pandemic.
- ❖ Explore and recommend ways to encourage retention to the activities.

RESEARCH RECAP

We surveyed 1000 US consumers and 500+ New or Reactivated Anglers and Boaters and collected information such as:

- Engagement with fishing and boating
- Motivations and barriers
- Typical trips
- Licensing, operation and equipment procurement
- Additional information
- Targeting

This information helped identify and understand who the New Anglers and New Boaters are, how they fit into the segmentation and how to retain their engagement in a post-Covid world.

PHASE 1: QUANTITATIVE SURVEY



Following the Quantitative Research, we invited New Anglers, New Boaters and consumers in the Active Social Family segment to participate in sequential discussion boards designed to unearth deeper, more personal insights around who they are and what their relationship is with boating and fishing.

Topics of Discussion Include:

- **Newcomers Fishing and Boating Journeys**
 - How they entered the sport, obstacles, what they like and dislike about boating and fishing and how it fits into their routine
- **Future Goals:** what are their aspirations, what they need help with, what can make the experience better
- **The Role of Gear:** where its purchased, how much was spent & what an overall investment in a fishing trip looks like

PHASE 2: DEEP-DIVES



STUDY SPECIFICS



QUANT SURVEY

- 15-20 minute, device agnostic, online survey, fielded from September 23rd – 30th
- N=1005 US Residents, balanced to census, age 18-54
- N=641 New Anglers, New Boaters, Reactivated Anglers or Reactivated Boaters
 - New Anglers / New Boaters = Fished/Boated for the first time ever, since childhood, or in over 5 years
 - Reactivated Anglers / Reactivated Boaters = Fished/Boated in past 6 months
- N=302 Acculturated Hispanics, balanced to census



| | |
|---------------------|-------|
| New Fishers | n=343 |
| Reactivated Fishers | n=111 |
| Previous Fishers | n=140 |
| Lapsed Fishers | n=381 |



| | |
|---------------------|-------|
| New Boaters | n=245 |
| Reactivated Boaters | n=71 |
| Previous Boaters | n=104 |
| Lapsed Boaters | n=377 |



COMMUNITY DEEP DIVES

Short-term community with three qualitative sequential discussion boards for Newcomers (NC) and Active Social Families (ASF).

Fielded:

- Three sequential discussion boards: 10/9/20 – 10/19/20
 - Journey, Goals, Gear

Target Audience:

- Male/female, 18 – 54 yo
 - Newcomers (new or reactivated fisher, new or reactivated boater), N = 73 – 87 per discussion board
 - Active Social Families, N = 62 – 67 per discussion board



Quotes marked with navy quotation marks = Newcomers



Quotes marked with cyan quotation marks = Active Social Families



The American Sportfishing Association recently published research segmenting and personifying current Anglers. Due to methodological differences, comparisons should be made with caution, if at all, between the bodies of work.

IPSOS'S RESEARCH

- Segmentation research conducted in early 2019 among current fishers and boaters or anyone interested in either activity.
- Identified 6 segments of growth potential for the fishing and boating industry.
- New Angler and New Boater Identification (this report) conducted in Fall 2020, post pandemic

ASA'S RESEARCH

- Persona Research conducted in 2019, pre-pandemic.
- Identified 7 segments of people who fished in the past 3 years or planned to fish in the next year.



Due to sample definition differences and unknown sampling methods, these are rough comparisons across segmentations. It should be noted that an 'apples-to-apples' comparison is not possible.

IPSOS RESEARCH

Sample: Current & Potential Anglers and Boaters

ASA RESEARCH

Sample: Current Anglers

IDENTIFIED SEGMENTS:

| | |
|-------------------------|---------------------------------------|
| Avid Adventurists | Adventurous Angler, Occasional Angler |
| Active Social Families | Friendly Fisher, Social Dabber |
| Family Focused Relaxers | Consumptive Angler |
| Leisure Time Enjoyers | Zen Angler |
| Lukewarm Occasionalists | |
| Uncommitteds | |

EXECUTIVE SUMMARY & NEXT STEPS

THE IMPACT OF CORONAVIRUS ON SUMMER 2020



"As of June, nearly two out of every three summer camps have opted to remain closed this year, according to CampMinder, which surveyed 885 programs on their plans for the season... Approximately 19.5 million children will not have camp experiences this summer." - [Foxnews.com](https://www.foxnews.com)

"With many businesses and industries still being impacted by the coronavirus and the resulting shutdowns, it seems more people are turning to the outdoors to stay busy... Various states across the country saw a significant increase in the number of fishing licenses sold. The New Mexico Department of Game and Fish, for example, has already sold 6,000 more licenses this year than last." - [CNBC.com](https://www.cnbc.com)



"...Summer does open-up more opportunities for outdoor activities, which all agree are far safer than indoor ones. "We have very little evidence of outdoor transmission. It's not zero – there are definitely cases reported – but it's much, much lower than inside... Most campsites provide a good buffer between you and other camping groups." - [Washingtonpost.com](https://www.washingtonpost.com)

The spread of Covid-19 had a shocking and detrimental impact on the lives of Americans in 2020.

With restrictions on school and workplace attendance, being out in public versus essential needs and the implementation of social distancing, behaviors were forced to adapt.

Typical Summer activities were also halted with the closures of amusement parks, summer camps, public swimming pools and limited visitors to public places, consumers were forced to consider alternative activities for themselves and their families.

HOW ALL ANGLERS AND BOATERS SEGMENT

Most New Anglers, New Boaters and Reactivated Anglers segment into the Active Social Family target group (RBF's target growth segment), based on their motivations for being outdoors and for boating/ fishing. These activities appeal to ASFs because they provide a space to bond and connect with others, to enjoy company, relax in the outdoors and make memories. **This strong classification suggests marketing activity in the 2019-2020 year was successful in reaching Newcomers (New Anglers and New Boaters) and indicate that the motivations for participation are the same.**

Many Reactivated Boaters fall into Leisure Time Enjoyers – consumers driven by the desire to relax but who wouldn't consider themselves “outdoorsy.”

After comparing the Newcomers in the ASF segment with Established Anglers and Boaters in the ASF segment, the only notable difference is related to the level of experience of Established Anglers and Boaters, suggesting that Established Anglers and Boaters are too, motivated by social aspects, relaxation and bonding.

| | TOTAL NEW & REACTIVATED ANGLERS & BOATERS | NEW ANGLERS | REACTIVATED ANGLERS | ESTABLISHED ANGLERS | NEW BOATERS | REACTIVATED BOATERS | ESTABLISHED BOATERS |
|--------------------------------|---|-------------|---------------------|---------------------|-------------|---------------------|---------------------|
| <i>Base: Total Respondents</i> | 641 | 343 | 111 | 140 | 245 | 71* | 104 |
| Avid Adventurists | 10% | 9% | 13% | 31% | 8% | 14% | 27% |
| Active Social Families | 39% | 51% | 23% | 26% | 49% | 17% | 26% |
| Family Focused Relaxers | 13% | 11% | 20% | 22% | 8% | 17% | 20% |
| Leisure Time Enjoyers | 15% | 8% | 22% | 6% | 11% | 39% | 15% |
| Lukewarm Occasionalists | 17% | 17% | 18% | 11% | 19% | 3% | 11% |
| Uncommitteds | 6% | 5% | 5% | 3% | 5% | 10% | 1% |

A portion of Established Anglers and some Established Boaters are also **Avid Adventurists**, participating for the thrill, and with a wide consideration set of activities.

TEN-THOUSAND-FOOT VIEW

NEW ANGLERS AND NEW BOATERS

[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."

CHARACTERISTICS

- "Seasonal" participants
- Fishing/ boating is not the primary goal of the trip but is a component of a day-weekend set of activities

MOTIVATIONS

- Seek social aspects and bonding
- Consider it ways to build memories and connect with loved ones
- Relaxation & "dis-connection"

DEMOGRAPHICS

- Young Families
- High Income
- Total US + NE + Urban Areas

REACTIVATED / ESTABLISHED ANGLERS AND BOATERS

When I was a kid, we always went fishing with my father and my two brothers... in a place with a very warm climate and a beautiful landscape in which we'd catch the best fish, and I say that they are the best because they were really very big and somewhat difficult to fish and since then it has become a sport in which I go every weekend to fish and clear the mind."

CHARACTERISTICS

- Passionately participate; it is part of life
- More Established Boaters and Anglers are thrill seekers and competitive
- Fishing is the main event/ focus of a trip
- Boating is all about relaxation

MOTIVATIONS

- Boating and fishing are nostalgic, part of routine
- Relaxation
- Challenge/ competition

DEMOGRAPHICS

- Average Income
- Skew Older and Under 25
- Total US + Rural and Suburban Areas

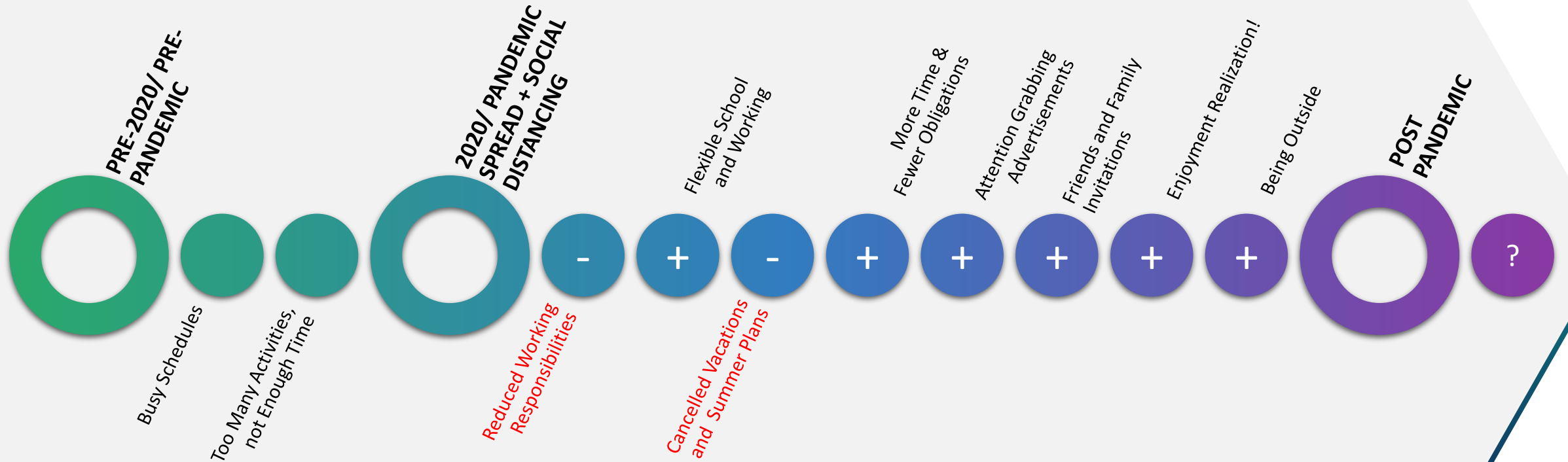
The core differences between New and Established Anglers/ Boaters are the motivations which **first introduced them** to the sport. **Social connections, relaxation and making memories** versus **nostalgia and a challenge**.

Many of the perceived benefits that keep them coming back are shared: bonding, nice way to spend a day, being outside.

THE 2020 ANGLER / BOATER JOURNEY

The journey of the Newcomer is largely due to the social, environmental and personal implications of the global Covid-19 Pandemic. Originally having busy, packed schedules, Non-Anglers and Non-Boaters didn't have the time to fit these activities in, spending the little flexible time on other priorities.

- However, the spread of the coronavirus led to flexible schedules, reduced working hours and the elimination of typical activities, offering up free time with few things to do.
- Looking ahead, it will be critical to maintain appeal and remain top of mind to ensure fishing and boating stays in the consideration set of 'things to do.'



HOW BOATING AND FISHING FIT INTO THE LIVES OF NEW PARTICIPANTS IN 2020

In the Summer of 2020, fishing and boating became a new activity that families could do together in newly, unoccupied time. For most, it also allowed them to follow through in doing something they had always wanted to but never got around to because of other priorities. Social aspects, 'disconnecting' and making memories are core motivators to encourage future participation.



ENCOURAGED BY MEDIA AND OTHERS

"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."

Invitations, coupled with **advertisements** seen on TV, online, on social media, in magazines and on blogs, further encouraged Americans to give boating and/or fishing a try.



FILLED FREE TIME

"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."

In the wake of the Covid-19 pandemic, about 1 in 5 New Anglers or Boaters experienced job loss, reduced hours and other changes that impacted the amount of **free time**. Likewise, summer vacations, camps and sports were cancelled, resulting in free time with nothing to do.



A GOOD WAY TO SOCIAL DISTANCE

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

The security of being outside and still able to enjoy the company of others distantly, encouraged participation. Heavy cross-over of boating/ fishing with camping and hiking showcases how fishing and boating was a component of consumers' attempt to 'socially, get-away.'



WHILE MAINTAINING SOCIAL CONNECTIONS & MAKING MEMORIES

"I feel a connection to it because now it is tied to family memories and adventures with my husband and children. I so enjoy the time spent doing it now because of my children."

Regardless of previous experience or interest in fishing and boating, consumers realize the perks of fishing – being able to safely spend times with loved ones and enjoy each other's company.



NATURE'S CALLING

"It's always a relaxing time to spend a day, an afternoon, or even just an hour of free time."

Many of the benefits of boating and fishing that new participants mention are driven by being **outdoors**.

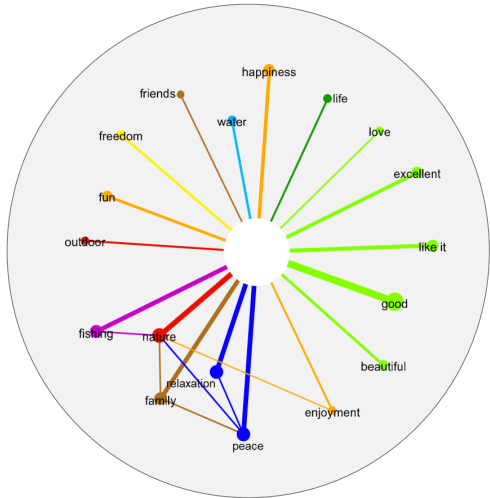
Consumers found peace, relaxation and calmness in nature. Fresh air is **intrinsically motivating**.



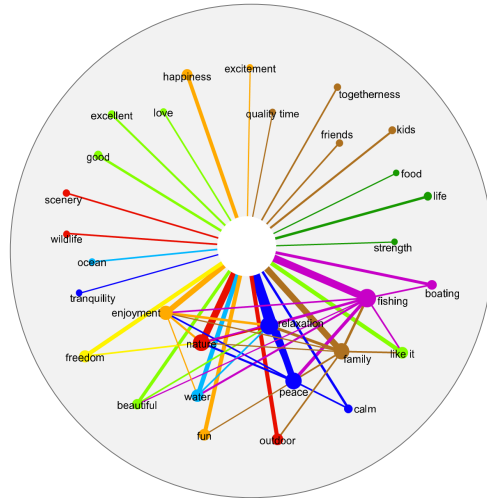
MOTIVATIONS FOR BOATING & FISHING

As consumers incorporate fishing and boating into part of their routine, their mental networks of motivations and benefits of the sports become denser and more inter-connected.

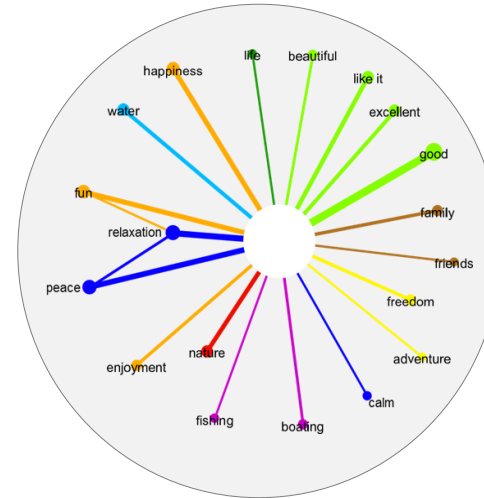
New Angler Mental Network



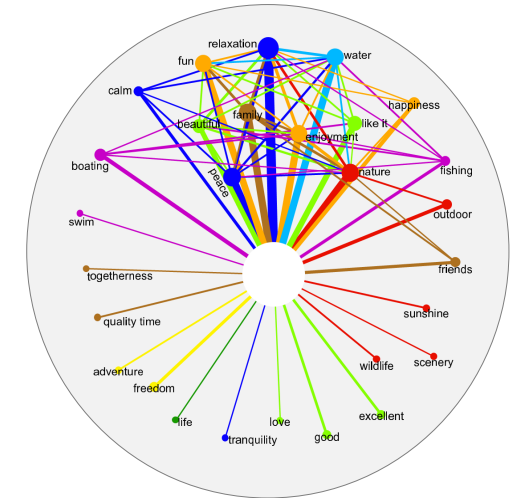
Established Angler Mental Network



New Boater Mental Network



Established Boater Mental Network



For all consumers, the positive emotions of **peace**, **relaxation**, **enjoyment** and **fun** are perceived benefits, and all are motivated by the opportunity to **spend time with family**. As consumers integrate the sports into their lifestyle, they begin to also be motivated by the opportunity to spend **quality time**, **make memories** and include their **kids**. Aspects of **adventure**, **freedom**, and **challenges** resonate more among Established Boaters and Anglers.



The perfect fishing trip

It starts very early in the morning with the company of my wife and children, I go to the nearest river and we just have fun!.. The most important part is obviously fishing for something and with that the day ends when you eat what you catch.” – New Angler

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

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

The day starts out at dawn and ends at dusk and I have maximized all daylight hours. I am alone and I go out to a remote lake to boat and fish alone. I do not bring anything but a fishing pole, bait, and water and sub sandwiches and a smile.” – Established Angler

The perfect fishing outing is a day of catching a lot of fish.” – Established Angler

FISHING TRIP DETAILS

For most fishing trips, the purpose is rarely to only fish, especially among New Anglers. Fishing is instead, a component to a full day away or a longer weekend trip often including:



SWIMMING



CAMPING



BOATING



WATER SPORTS



HIKING

All Anglers describe their perfect fishing trip as a day of relaxation and spending time with friends and family.

It is more common for Established Anglers to consider a fishing trip a solo activity or include “catching fish” as an indicator of a successful trip.



Anglers didn’t travel far – 60 minutes at most. New Anglers went fishing more frequently, about once per week; Reactivated and Established Anglers went 2-3 times per month



Most New Anglers were accompanied by their children, significant other and/or friends.

The others who joined them were usually more experienced anglers, or at least had fished prior.

Established Anglers were most likely to have gone fishing alone (about a third).



New Anglers experimented with the types of fishing, with a mix of fresh and saltwater fishing, fly fishing, and even bow fishing.

Majority of Reactivated and Established Anglers went freshwater fishing, though saltwater fishing was more common among Established Anglers.



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The perfect boating trip

The day starts with coffee on the boat with a friend or two. We bring snacks, sandwiches and music. We talk and enjoy company as we watch the lines... we enjoy a good dinner and a few drinks around a blazing campfire.” – New Boater

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... we are able to stay out on the lake until dusk to enjoy our day fully and completely.” – New Boater

It would involve being with my friends, going to our favorite spot and anchoring. We would have a mix on the speaker of relaxing songs...Then just float around the boat listening to music and drinking.” – Reactivated Boater

Day starts before sunrise, ends after sunset. I'm with my family and/or friends. We're in a local creek. We brought some [food]. We have a Bluetooth speaker, a picnic mat and a lot of fishing gear.” – Established Boater

I start packing my reel and rod. I grab some bait and pack some water and 6 pack of Pacifico into a cooler with ice. I head over to the dock.. I have no goal in mind. Just being able to be out in open water is nice. I sit there and have a few drinks. I enjoy the moment. It makes me feel free.” – Established Boater

BOATING TRIP DETAILS

When consumers go boating, its typically at least a full-day activity, or a component of a longer trip. The time is spent surrounded by family and friends, simply enjoying the company and nice weather. These adjacent activities are more common among New Boaters than Established or Reactivated Boaters.



CRUISING



SWIMMING



SUNBATHING



CAMPING



HIKING



Majority of Boaters didn't travel far – at most an hour distance to boat. New Boaters went most frequently, about once a week and Reactivated and Established Boaters about 2-3 times a month.

Lakes are the most common body of water, followed by rivers.



About 2 in 5 New Boaters made a boat purchase this past season, leveraging Google, boat shows, friends/family and websites for information.

Bay Boats, Pontoon Boats, Fish-and-Ski Boats and Freshwater Fishing Boats are the most common types of boats owned by New and Established Boaters

In addition to these boats, **Canoes** were also used this past summer for boating activities.

Few Reactivated Boaters own a boat, opting to join others who own boats or to rent one.

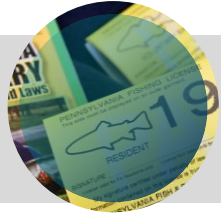


For Established and Reactivated Boaters, 3 in 4 are passengers. However, over half of New Boaters are operators.

Dealership classes and being taught by others are the most common ways New Boaters learned to operate, but for Established Boaters, most were self-taught.

EQUIPMENT AND GEAR

Gear purchasing is most crucial for Newcomers as Established and even some Reactivated Participants have the necessary equipment and accessories. When Reactivated or Established Boaters and Anglers (in the Active Social Family Segment) buy something, it is usually as a replacement or an upgrade. These consumers are also more likely to desire advanced gear, but that isn't the primary driver to purchasing.



MOST NEW ANGLERS PURCHASED A LICENSE

However, a proportion (more likely to be Reactivated Anglers) did not purchase one because they didn't feel it necessary, didn't understand why it was required or were fishing on private property.

Catch and release from a little perch on shore. I do get a license when we've done serious fishing, like tidal or deep sea."

I didn't feel like it was necessary for just the day."

I don't agree with the idea that people who fish recreationally need to buy a license.

We didn't need one. We were fishing off family land."

Location-location-location Dick's is less than 5 miles away."

I got rid and reel, fishing line, hooks and bait. I got mostly from Amazon. It wasn't hard to find just had to read a lot of reviews."



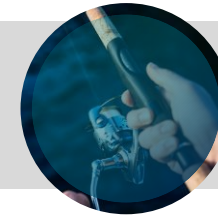
WILL CONTINUE TO BE A CORE CONSIDERATION FOR NEWCOMERS

Amazon is an extremely attractive option for Newcomers as it provides comprehensive customer reviews, easy-to-navigate interface, broad selection, quick & free delivery and fair pricing.



Dick's is attractive to Newcomers for its close proximity, curbside pickup, good customer service and sales. It may also be less intimidating than BPS which is more common among Established or Reactivated ASF's.

Less common retailers, but still mentioned include eBay (for Newcomers), Walmart and Cabela's.



NEW ANGLERS AND BOATERS PURCHASED CRITICAL GEAR BUT DIDN'T INVEST WILDLY

The most common gear purchased for New Anglers are the essentials: rods/reels, fishing line, bait/tackle and proper clothing.

Less common, more specific items include: fish finder, accessories, scaler or specialized gear.

The majority of Newcomers spent less than \$100 on gear this first year (excluding rental costs), compared to upwards of \$500 spent by Established or Reactivated ASF Consumers.

Renting/ borrowing boats, life jackets, and core fishing gear was attractive to Newcomers as their interest and frequency was relatively unknown.

I did not purchase any specific gear this year. If I were to do so, I would probably go to Dick's Sporting Goods."



NEW ANGLERS AND BOATERS OFFER AN OPPORTUNITY TO BUILD LOYALTY TO RETAILERS AND/OR BRANDS

There are few preferences for brands, resulting in **strong utilization** of resources such as sales associates, experts and online reviews.

Retail brick & mortar stores are the primary channel followed by online purchasing.

New Anglers/ Boaters are most likely to also buy from second-hand stores or via re-sale websites.

We purchased a kids fishing pole from a second-hand store to save money because we weren't sure if we should invest in it if my kids weren't interested."

IMPACTING RETENTION

To predict whether Newcomers will continue with their participation next year, we must understand the interest in boating and fishing from a **behavioral science lens** to predict whether or not these behaviors will persist.

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 can understand habit formation by examining these three key elements of behavior which encourage repetition and lead to habits.

1. **CUES:** Will the factors that serve as cues to go boating and fishing remain?
2. **BARRIERS:** How can we address behavioral barriers as the world evolves post-Covid?
3. **REWARDS:** Will rewards remain salient?

THE COMPONENTS THAT WILL HELP FORM FISHING AND BOATING HABITS

Fishing and boating did not really replace other hobbies as we will still do them during future summers but this year all the theme parks, museums, arcades, were closed so fishing and boating filled that void for my family."

I think once life returns to "normal" there will be more things that will be demanding our time. I think our kids sports and activities will have more robust schedules, our calendar will be fuller, there will also be many more family get-togethers and events.. However, I think we will have a higher priority on trying to get out to the lake. This year has really reminded us of how much we enjoy it and how memorable time on the water can be."

I imagine I might do a little less fishing and boating than this summer, simply because there will be more activities demanding my time, but I think overall it will still be more than pre-Covid, when I rarely did it at all."

CUES

Will the factors that serve as cues to go boating and fishing remain?

Situational Cues Experienced

- Flexible work and school hours opened more time
- Cancelled plans, summer activities, and closed attractions left consumers with little to do
- Social distancing was a concern

Social Cues Experienced

- Advertisements and messaging contributed to the interest of New Anglers and Boaters in the sports
- Children requested to go fishing and/or boating
- New Anglers and New Boaters were invited by others to join them

BARRIERS

How can we address behavioral barriers as the world evolves post-Covid?

Initial Barriers to Trial

- Didn't have time
- Had other priorities
- Didn't have anyone to go with
- Didn't have any interest

Experienced Barriers to Repetition

- User error
- Bad experiences/ trips
- Lack of Information and knowledge
- Problems with gear
- General discomfort

Expected New Barriers Post-Covid

- Social distancing may not be as impactful next summer as it was in 2020
- There may be fewer closures, cancellations or an increase in planned activities
- 'Normal' working hours may resume; flexible work and learning schedules may change

REWARDS

Will rewards remain salient?

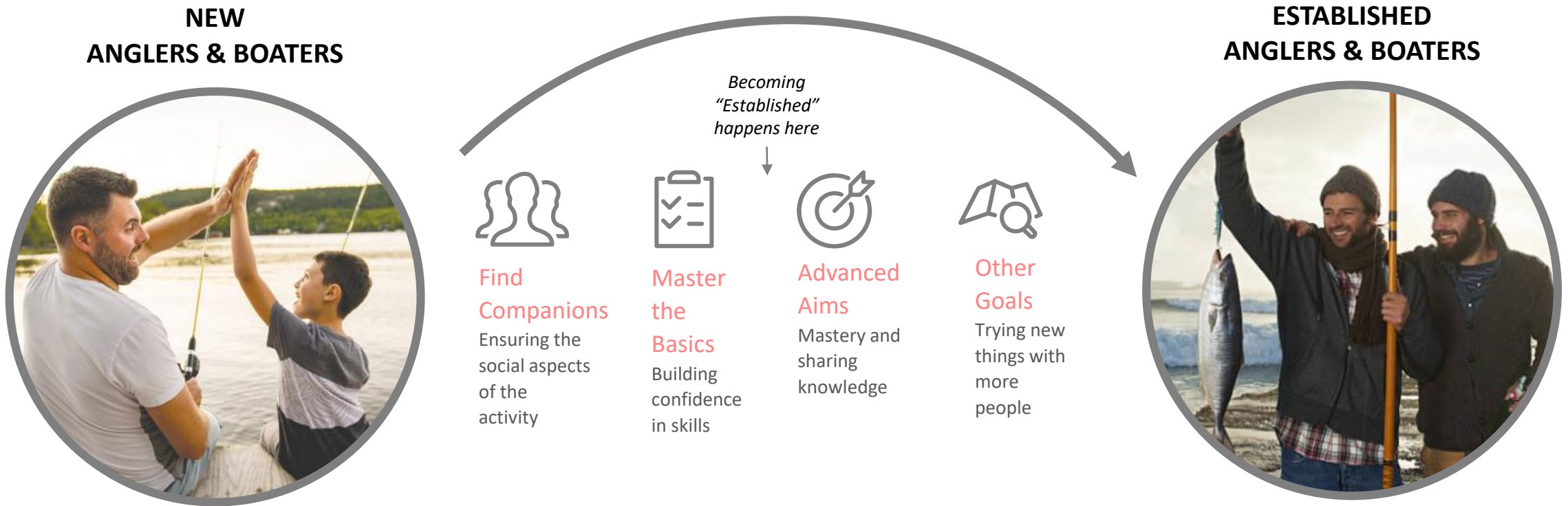
Experienced Motivations and Rewards to Persist

- The ability to be socially-distant and yet still have social connections and make memories
- The excitement of actually catching a fish or being out on the open water
 - Honing their new skills and getting better
 - Using the gear they invested in
- The tranquility of being in nature and disconnecting from technology

ENCOURAGING REPETITION

Newcomers are more likely to be motivated through the involvement of others and the social aspects.

Established ASFs are more likely to be motivated by learning how to improve their skills and knowledge. Helping both Newcomers and Established ASFs maintain motivation is critical to ensure strong participation in the future years.



Social aspects will encourage repeat, allowing Newcomers to master the basics and giving them the confidence and flexibility to participate more in various situations (alone, with those less experienced etc.). As basic skills are built, Newcomers will feel more accomplished, satisfied and more likely to continue.

BEHAVIORAL BARRIERS TO CONSIDER

INITIAL BARRIERS TO TRIAL



Restricted Time

- Lack of time (#1 among Reactivated Lapsed Anglers)
- Other activities taking time/ priority

Time. Sometimes it is hard to find the time in my crazy schedule."

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



Personal Circumstance

- Having children
- Not being 'outdoorsy'
- Not living conveniently near water

My children got into their own rec activities (soccer, softball, baseball, robotics), and we catered to their interests."



Perceived Lack of Interest

- Personal preference
- Fear
- Simply not considered/ top of mind

I think I was turned off by having to spend a lot of time waiting. But now that I have experienced it, it's a whole different story. I now enjoy the patience required."



Companions

- Finding others to go with

As I've gotten older, it's more about finding people that are willing to spend a day or so fishing."

When I was younger my uncle used to take me out fishing all the time. He passed away and there was no one to take me fishing. It wasn't until I was older that I realized some of my friends enjoyed it."

ACTUAL BARRIERS EXPERIENCED



User Experience

- Not catching any fish
- Getting hooks caught in hands/ tangled
- Getting Lost
- Boating troubles
- Getting sea-sick

It was my first attempt fishing, my second attempt boating on my own. I remember having little to no control of steering the boat and was unable catching anything when I started fishing. Because I had little knowledge of the proper fishing practices, the only thing I caught was a small bass that managed to slip away from my reach."



Information/ Knowledge

- Understanding laws, policies, licensing/ registration
- Learning to maneuver a boat / fishing rod



Gear/ Equipment

- Having the right equipment/ Knowledge of what is needed
- Expensive costs

*"When I new to fishing and boating things were difficult for me. It took time for me to get used to both; it require **a lot of studying** in my part. On how to use a fishing rod and the steps with boating but there is help if you need."*

The most challenging day on the boat was when it began raining and was windy. I'm not very experienced so it was tough for me to navigate into the slip."



Discomfort

- Weather conditions
- Insects/ bug bites
- Touching fish/ bait



BY ADDRESSING THE BARRIERS EXPERIENCED BY NEW ANGLERS AND BOATERS, YOU CAN INFLUENCE BEHAVIORS IN THE POST-COVID ENVIRONMENT



REMIND NEWCOMERS OF THE GREAT EXPERIENCES THEY HAD IN 2020

Ensure those activities remain top of mind, highlighting how much they enjoyed participation & of the great memories they made.

Showcase how easy it is to incorporate the activities into any outdoor trip.

HIGHLIGHT CONVENIENT, LOCAL AREAS

Next year, free time may be competing with more activities and obligations. Ensure that local agencies or stakeholders highlight 'quick trips' so consumers don't feel they need an entire day of time.

ENSURE RESOURCES ARE AVAILABLE, TOP OF MIND AND EASY TO FIND. PROVIDE:

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



RETAILERS SHOULD LEVERAGE WHAT THEY KNOW ABOUT THEIR CUSTOMERS

Reach out to those who made a purchase with:

- Friendly reminders "don't let your purchase go to waste!"
- 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.)

REACH NEWCOMERS AND ACTIVE SOCIAL FAMILIES ON THE SAME CHANNELS

The increased participation among specifically Active Social Families suggests that marketing activity in 2019-2020 was successful. Continue to message on those channels and consider including media on streaming sites such as Netflix, Hulu and Disney+.



HELP IMPROVE THE USER EXPERIENCE

Have experienced Anglers and Boaters share tips and tricks to help Newcomers reach their goals.

Consider organized/ networking events to help people meet others involved and share experiences.

Highlight technology (e.g., FishBrain) to make fishing trips more productive.

AMP UP THE SOCIAL ASPECTS OF BOATING AND FISHING

Consider event calendars, Facebook groups for local fishing & boating communities

- Create online and IRL support groups, that provide a social network to those still new to these sports.
- Incentivize new participants to form and reinforce their own social bonds with others while engaging in these sports.
- Promote group discounts or packages.



DETAILED LEARNINGS

ACTIVE ANGLER & BOATER PROFILES

SIZE OF PRIZE

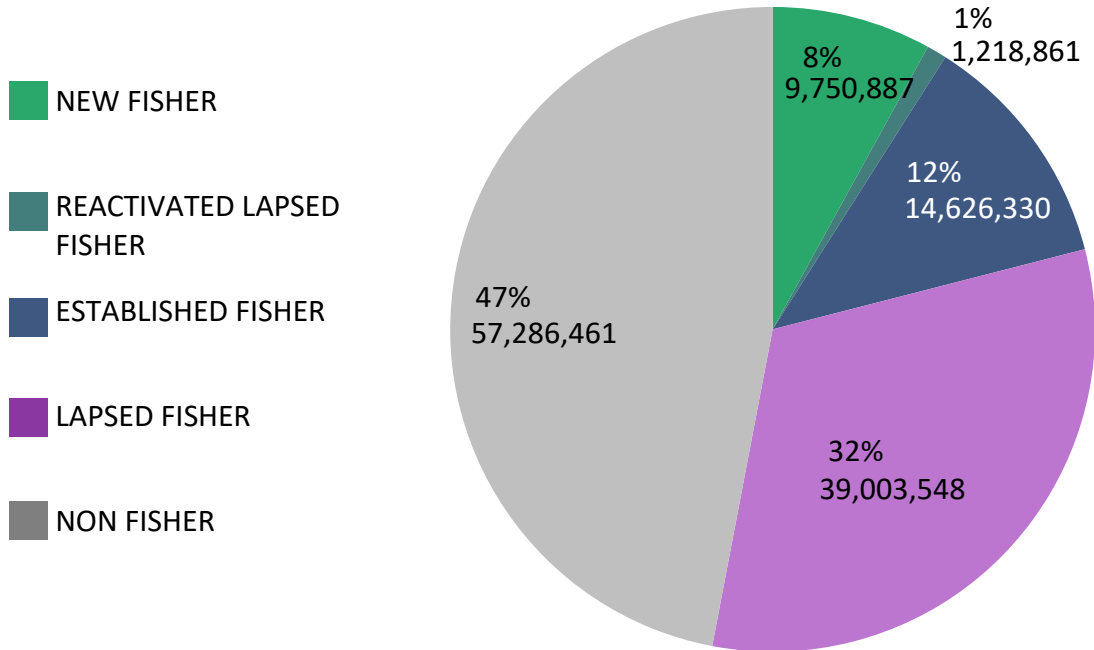
It is estimated that ~17M consumers either began boating and/or fishing this past season or came back to the sports after having lapsed.

TOTAL NEW OR REACTIVATED ANGLERS/BOATERS: 17,100,436



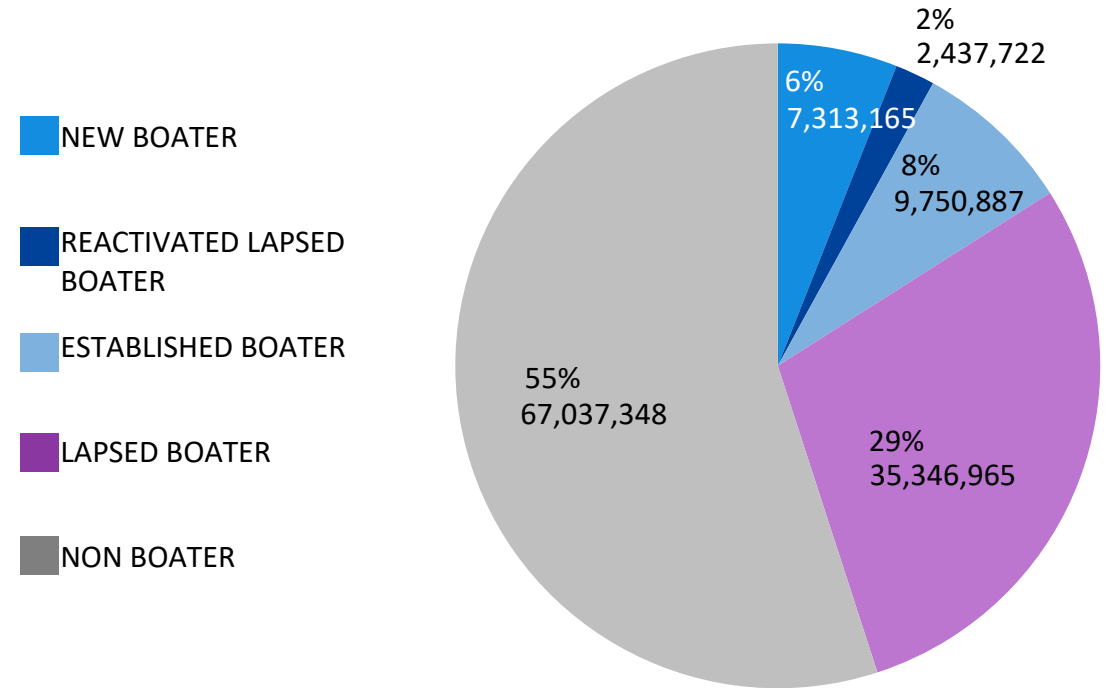
ANGLER DISTRIBUTION
Among the US Population

TOTAL NEW OR REACTIVATED ANGLERS: 10,969,748 (9%)



BOATER DISTRIBUTION
Among the US Population

TOTAL NEW OR REACTIVATED BOATERS: 9,750,887 (8%)



*Ipsos analysis. Based on estimated 122 million people aged 18-54

Base: US Rep (N=1005)
New/ Reactivated Fishers and New/Reactivated Boaters are not mutually exclusive



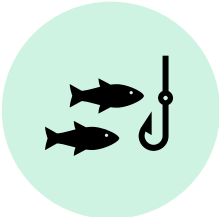

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CROSS PARTICIPATION

A significant proportion of Acculturated Hispanics began fishing again this past season after having lapsed.





Among New Boaters, over a third were also New Anglers; likewise, a fair portion of Reactivated Boaters also became New Anglers, suggesting a high co-participation of the sports.

| | | Total US Population | Acculturated Hispanics | New Anglers | Reactivated Anglers | Established Anglers | Lapsed Anglers | New Boaters | Reactivated Boaters | Established Boaters | Lapsed Boaters |
|--|---------------------------------|---------------------|------------------------|-------------|---------------------|---------------------|----------------|-------------|---------------------|---------------------|----------------|
|  | Base: Total Respondents | 1005 | 302 | 343 | 111 | 140 | 381 | 245 | 71* | 104 | 377 |
| | NEW FISHER | 8% | 5% | 100% | | | | 41% | 17% | 15% | 15% |
| | REACTIVATED LASED FISHER | 1% | 3% | | 100% | | | 3% | 11% | 13% | 13% |
| | ESTABLISHED FISHER | 12% | 7% | | | 100% | | 10% | 13% | 38% | 9% |
| | LASED FISHER | 32% | 24% | | | | 100% | 22% | 38% | 21% | 50% |
| | NON-FISHER | 47% | 61% | | | | | 24% | 21% | 13% | 13% |
|  | NEW BOATER | 6% | 5% | 29% | 7% | 18% | 14% | 100% | | | |
| | REACTIVATED LASED BOATER | 2% | 1% | 4% | 7% | 6% | 7% | | 100% | | |
| | ESTABLISHED BOATER | 8% | 5% | 5% | 12% | 28% | 6% | | | 100% | |
| | LASED BOATER | 29% | 21% | 16% | 43% | 25% | 49% | | | | 100% |
| | NON-BOATER | 55% | 68% | 46% | 31% | 23% | 24% | | | | |

Green = over index vs US Rep (120+); Red = under index vs US Rep (-80)

KEY TARGETING INFORMATION

In comparison to the total US population, New Anglers and New Boaters are more likely to be Hispanic, and/or households with kids and to live in urban areas, or in the Northeast. This suggests that marketing efforts directed at these consumers have been successful! Additionally, Reactivated Anglers and Boaters are more likely to be female, suggesting females are more likely to lapse the sports.

| |  NEW ANGLERS |  REACTIVATED ANGLERS |  NEW BOATERS |  REACTIVATED BOATERS | |
|------------------------------|---|---|---|---|-----|
| DEMOGRAPHICS | | | | | |
| WHO THEY ARE | 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 | | | | | |
| WHERE THEY LIVE | % 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% |

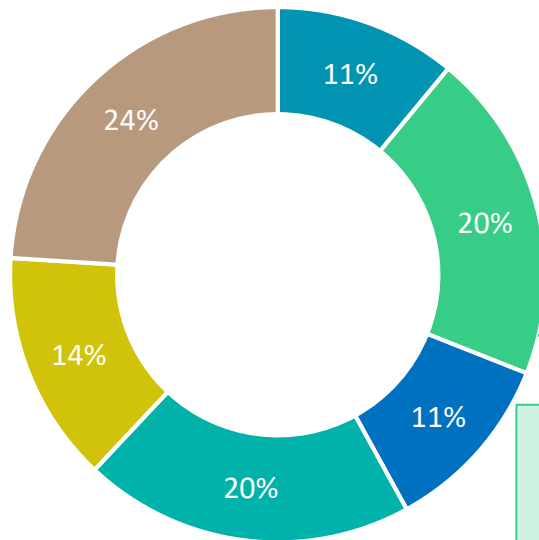
Green = over index vs US Rep (120+); Red = under index vs US Rep (-80)

SEGMENT DISTRIBUTION

New Angers/Boaters distribute heavily into the **Active Social Family** segment, significantly more compared to the Total US. If continuing to target Active Social Families, RBFF can expect to reach ~10.4 million Newcomers (New or Reactivated Anglers or Boaters).

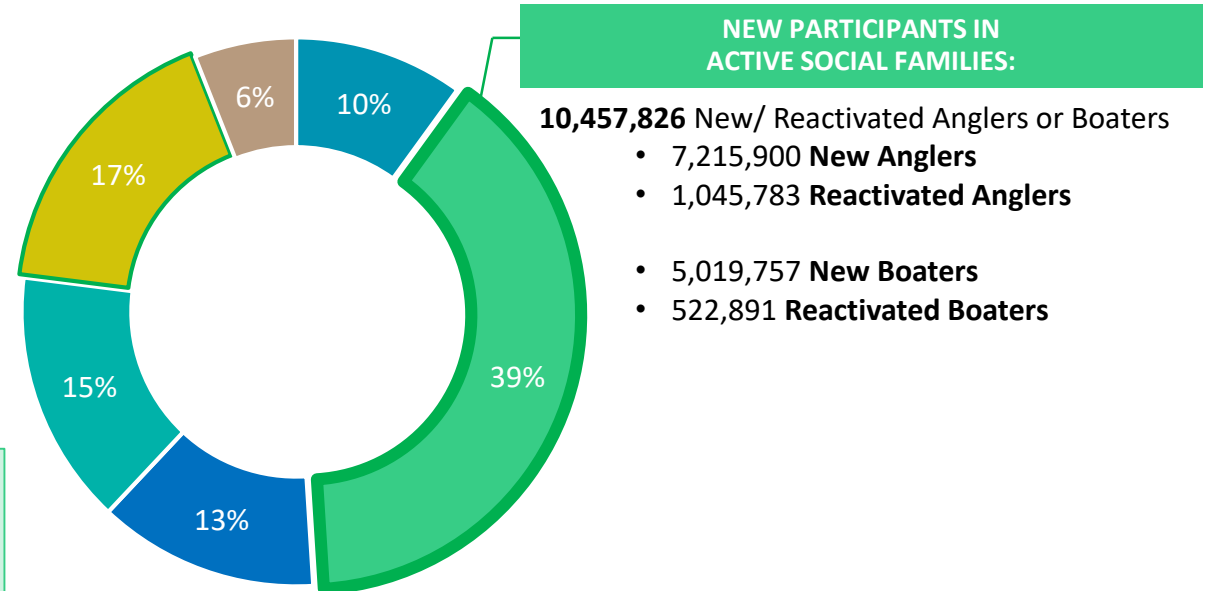
2020 US POPULATION DISTRIBUTION*

- Avid Adventurists
- Active Social Families
- Family Focused Relaxers
- Leisure Time Enjoyers
- Lukewarm Occasionalists
- Uncommitteds



*Among Rep Active Social Families, 21% are New Anglers, which is significantly more than any other segment

2020 NEW/REACTIVATED ANGLERS/BOATERS DISTRIBUTION



NEW PARTICIPANTS IN ACTIVE SOCIAL FAMILIES:

- 10,457,826** New/ Reactivated Anglers or Boaters
- 7,215,900 **New Anglers**
 - 1,045,783 **Reactivated Anglers**
 - 5,019,757 **New Boaters**
 - 522,891 **Reactivated Boaters**

Green Outline indicates the segment is significantly larger compared to distribution among Total US

* Distribution among US Population is comparable to 2019 once removing Uncommitteds from the analysis, as this survey included all Americans and not only those interested in boating or fishing because that was not found to be critical for the segmentation algorithm.

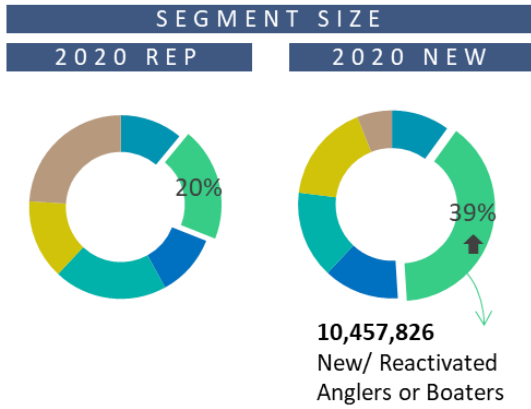
SOP: Ipsos analysis. Based on estimated 26.8 million people aged 18-54 who are new or reactivated anglers or boaters



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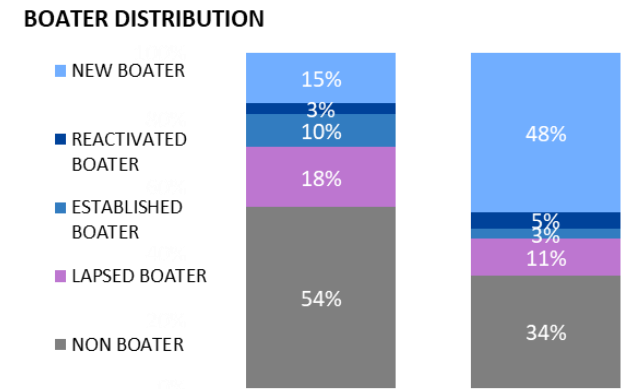
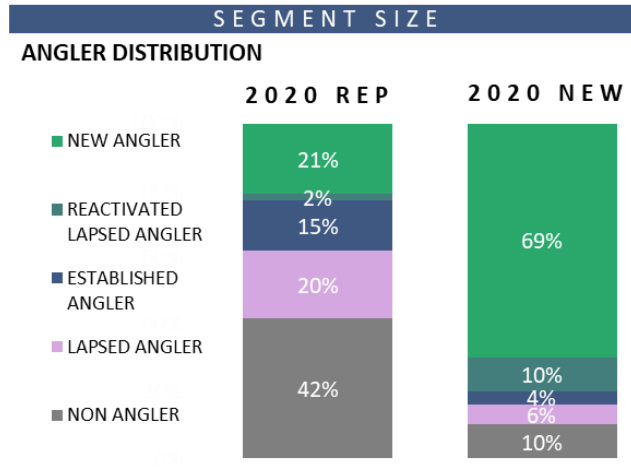


The New Anglers and Boaters in the Active Social Family segment are **almost identical** in attitudes and habits, compared to our representative group of ASFs. “New ASFs” are obviously comprised of more New Anglers and Boaters and are less likely to consider themselves ‘avid outdoorsmen’ but the aspects that appeal to them about boating and fishing make them comparable to all ASF consumers.



KEY ATTITUDE AGREEMENT Per Segmentation Algorithm

| | |
|---|---|
| I like many outdoor activities, but would not consider myself an avid outdoorsman | ↑ <i>slightly higher among New ASFs</i> |
| I enjoy participating in outdoor activities with my family | |
| I enjoy the social and adventure aspects of outdoor activities | |
| It's relaxing | |
| It's a good way to create memories | |
| It is a nice way to spend a day | |
| It's rewarding | |
| It's a good way to spend time with friends | |



KEY MEASURES

| FUTURE LIKELIHOOD | | | | ENJOY EXTREMELY | | | |
|-------------------|-----|---------|-----|-----------------|-------|---------|-----|
| FISHING | | BOATING | | FISHING | | BOATING | |
| REP | NEW | REP | NEW | REP | NEW | REP | NEW |
| 59% | 67% | 58% | 61% | 58% | 68% ↑ | 55% | 54% |

ATTITUDES

| | 2020 REP | 2020 NEW |
|---|----------|----------|
| Fishing/boating is relaxing and peaceful | 71% | 75% |
| I enjoy being near water when fishing/ boating | 73% | 71% |
| Fishing/boating helps me get away from my usual routine | 66% | 67% |
| Fishing/boating is a good way to create memories with friends and family | 74% | 67% |
| Fishing/boating is a nice way to spend a day | 66% | 67% |
| Fishing/boating takes me away from electronics | 71% | 65% |
| Fishing/boating is a great way to enjoy the outdoors | 72% | 65% |
| Fishing/boating is a good way to reduce stress | 62% | 65% |
| Fishing/boating is a great way to keep busy when other activities/ sports are not available | 66% | 63% |
| Fishing/boating allows me to catch and prepare food for my family | 60% | 63% |
| Fishing/boating helps me recharge | 64% | 62% |

Very much in-line with the behaviors of New Anglers and Boaters, “New ASFs” are more likely to do other activities while fishing or boating. Fishing and boating trips are similar, partaking in a mix of fishing types and traveling to near locations.

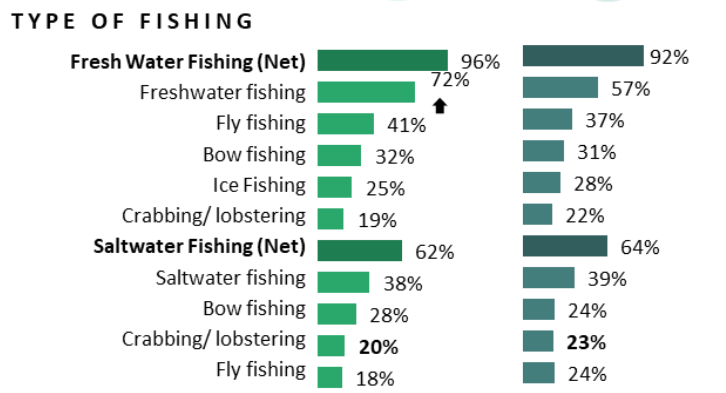
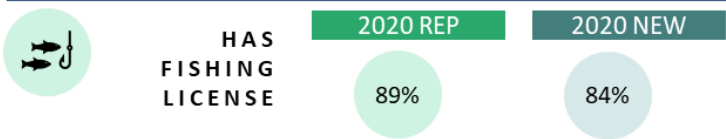
ADJACENT ACTIVITIES W/ FISHING

| | REP | NEW |
|----------------------------|-------|-------|
| Camping | 56% | 58% |
| Swimming | 47% | 62% ↑ |
| Motor Boating | 34% | 39% |
| Playing water sports | 33% | 46% ↑ |
| Kayaking/ Canoeing/ Rowing | 28% | 31% |
| Hiking/ biking | 22% | 37% ↑ |
| Sailing | 20% | 27% |
| Nothing, only Fishing | 15% ↑ | 9% |

ADJACENT ACTIVITIES W/ BOATING

| | REP | NEW |
|--|------|-------|
| Fishing | 65% | 71% |
| Swimming | 53% | 53% |
| Cruising on a boat/ riding around | 40% | 44% |
| Camping | 35% | 48% ↑ |
| Sunbathing | 32% | 33% |
| Hiking/ biking | 21% | 37% ↑ |
| Towed water sports | 21% | 31% |
| Transporting from one land mass to another | 16% | 24% |
| Nothing, only Boating | 7% ↑ | 1% |

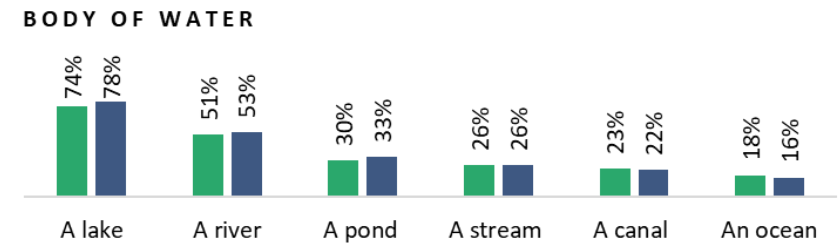
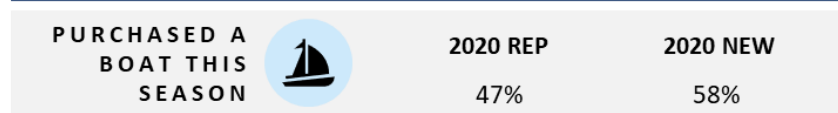
FISHING OCCASION MEASURES



| FISHING CADENCE | 2020 REP | 2020 NEW |
|------------------|----------|----------|
| Seasonally | 23% | 18% |
| Year-round | 58% | 45% |
| Special occasion | 19% | 36% |

| DISTANCE TRAVELED | 2020 REP | 2020 NEW |
|-------------------|----------|----------|
| Less than 1 hour | 55% | 62% |
| 1-1.5 hours | 25% | 22% |
| 1.5-3 hours | 11% | 11% |
| 3+ hours | 9% | 5% |

BOATING OCCASION MEASURES



| BOATING CADENCE - P6M | 2020 REP | 2020 NEW |
|-----------------------|----------|----------|
| 1x a week or more | 57% | 66% |
| Less Often | 43% | 34% |

| REASON FOR BOATING | 2020 REP | 2020 NEW |
|--|----------|----------|
| Friends/ family invited us to go boating | 53% | 42% |
| I had extra time because no other activities | 33% | 35% |
| I saw an ad about it on television | 33% | 31% |
| I had extra time because working less | 31% | 31% |
| I saw an ad about it online/ on social media | 22% | 29% |



ACTIVE ANGLERS, ~25.5 Million



New Anglers

represent approximately 9.7 million people in the US. They are made up of many young families, skew Hispanic and from urban areas across the country. For them, fishing represents peace, relaxation and family time and is a great opportunity to make memories and show-off on social media.

These consumers were introduced to fishing through family and friends, because of cancelled summer events and because of advertisements. New Anglers are more likely to do several adjacent activities when fishing, such as swimming and camping.



Reactivated Anglers

represent approximately 1.2 million people in the US. They are slightly older than New Anglers, with kids between the ages of 5 and 17, and are more likely to live in suburban areas.

These consumers had lapsed fishing due to not having time or not living near water and many have recently picked the sport back up because they had more free time and were not participating in other activities as usual. Typically, these consumers are 'only fishing' and not participating in adjacent activities.



Established Anglers

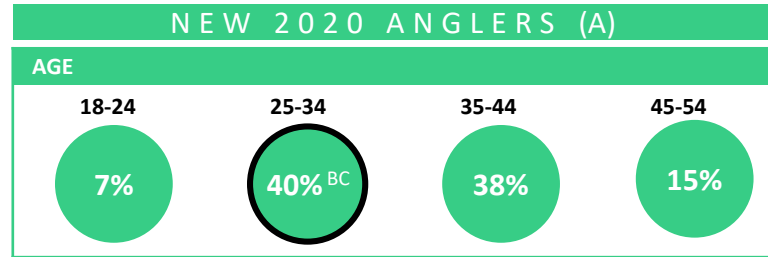
represent approximately 14.6 million people in the US. They span all ages, including a group of younger fishers (18-24), and live in suburban and rural areas.

Established Anglers are passionate about the sport and in addition to considering it peaceful, relaxing and a good way to make memories, also find it to be a good stress reliever. Many Established Anglers 'just fish' when they are fishing, and not necessarily camping, swimming etc.

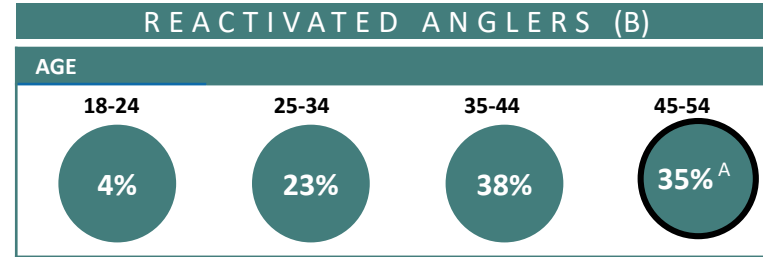
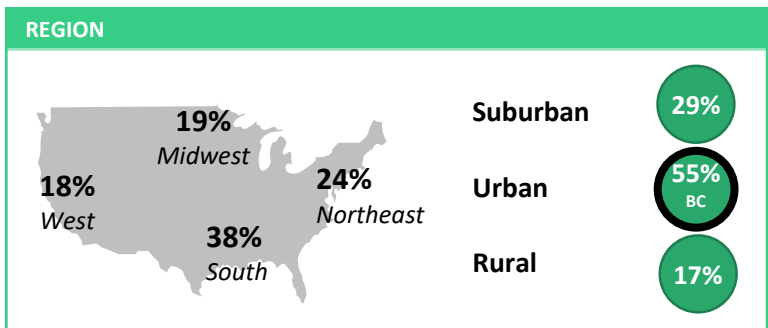




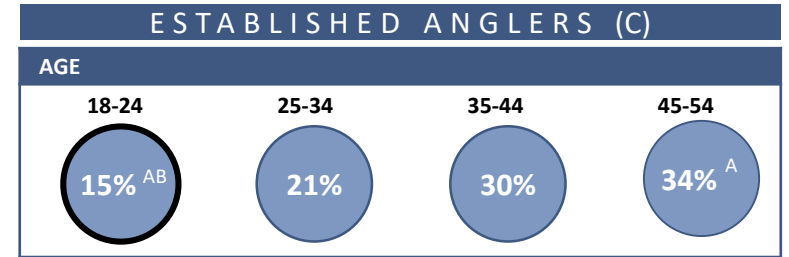
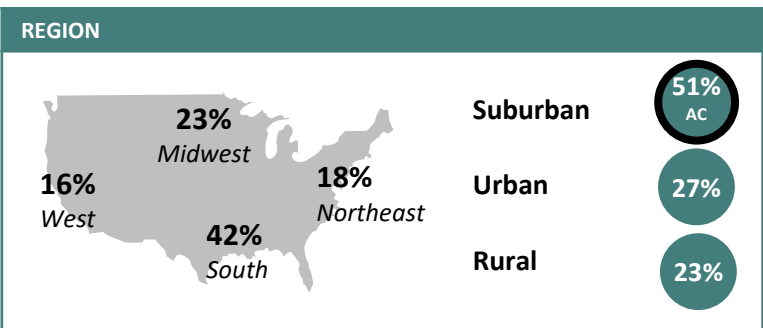
New Anglers are more likely to be young adults, married with kids and earning a slightly higher income than Established and Reactivated Anglers. They are dispersed across the country and span races. Interestingly, Reactivated Anglers are more likely to be women than men, suggesting that women are more likely to lapse in the sport (perhaps having other responsibilities come up).



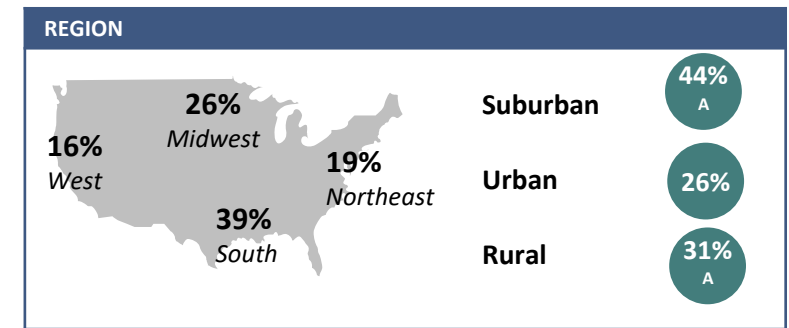
| | |
|-----------------|---------------------------|
| GENDER – Male | 59% ^{BC} |
| GENDER – Female | 41% |
| INCOME (mean) | \$95k ^{BC} |
| MARITAL STATUS | 73% Married ^{BC} |
| HH SIZE (mean) | 3.4 ^{BC} |
| CHILDREN IN HH | 73% ^{BC} |
| WHITE | 72% |
| HISPANIC | 15% ^B |



| | |
|-----------------|------------------|
| GENDER – Male | 43% |
| GENDER – Female | 57% ^A |
| INCOME (mean) | \$74k |
| MARITAL STATUS | 56% Married |
| HH SIZE (mean) | 3.0 |
| CHILDREN IN HH | 51% |
| WHITE | 84% ^A |
| HISPANIC | 5% |



| | |
|-----------------|------------------|
| GENDER – Male | 49% |
| GENDER – Female | 51% ^A |
| INCOME (mean) | \$74k |
| MARITAL STATUS | 52% Married |
| HH SIZE (mean) | 3.1 |
| CHILDREN IN HH | 51% |
| WHITE | 80% |
| HISPANIC | 9% |






Base: New 2020 Anglers (n=343); Reactivated Anglers (n=111); Established Anglers (n=140)
 RESP_AGE, RESP_GENDER, USHHI3, USMAR2, HHCMP10, KIDS02, QMktSize_US, US01ETH
 Capital letter indicates statistically greater than noted group at 95%



Reduced working hours among New and Reactivated Anglers likely contributed to having more time to partake in fishing this past season. Likewise, children spending more time at home/ not participating in regular summer activities likely also contributed to increased participation and the elimination of a key barrier, time.

“Now with the pandemic I am [fishing] more time with my family since before I was very busy with my work.”

| | | NEW 2020 ANGLERS (A) | REACTIVATED ANGLERS (B) | ESTABLISHED ANGLERS (C) |
|---|---|-------------------------|-------------------------|-------------------------|
| | Jobs (Net) | 69%^{BC} | 47% | 41% |
|  | My job hours were reduced | 31% ^C | 23% ^C | 11% |
| | I was required to work remotely | 25% ^B | 11% | 19% |
| | I have lost my job (either temporarily or permanently) | 21% ^{BC} | 8% | 9% |
| | Someone else who has been living in my household has lost their job | 21% ^{BC} | 11% | 8% |
| | My pay was reduced | 21% ^{BC} | 13% ^C | 3% |
| | Living Situation (Net) | 47% | 51% | 50% |
|  | Some / most public places were closed | 29% | 41% ^A | 42% ^A |
| | All stores, except grocery stores and pharmacies, were closed | 21% | 27% | 31% ^A |
| | I/ members of my family had to self-isolate | 15% | 13% | 16% |
| | I/ members of my family were under mandatory stay at home orders | 15% | 19% | 23% ^A |
| | I have relocated to another city or town due to job loss | 9% ^{BC} | 1% | 1% |
| | Children's Situation (Net) | 33% | 39% | 32% |
|  | My children had to spend more time at home | 24% | 34% ^A | 29% |
| | My children were unable to participate in regular summer activities | 19% | 27% | 22% |
| | My children completed the school year via remote learning | 17% | 28% ^A | 29% ^A |

Capital letter indicates statistically greater than noted group at 95%
 Base: New 2020 Anglers (n=343); Reactivated Anglers (n=111); Established Anglers (n=140)
 COVID_1. Have any of the following happened to you as a function of COVID-19? Select all that apply.





ACTIVE BOATERS, ~19.5 Million



New Boaters

represent approximately 7.3 million people in the US. Two in five New Boaters is also a New Angler, resulting in many similarities. New Boaters too skew Hispanic and are young families from urban areas. In the past, boating was not a key priority due to a lack of interest or having other activities take priority. Now, boating represents a relaxing way to spend the day, an approachable activity for the family and allows some to 'show off' on social media.

Just fewer than half of New Boaters purchased a boat this past season.



Reactivated Boaters

represent approximately 2.4 million people in the US. They are slightly older than New Boaters and have both young and older children. They have lapsed with boating in the past due to not having the time, the right equipment or from having other activities take priority. However, majority of Reactivated Boaters re-joined the sport because they were invited and had extra time this past season.

Majority of Reactivated Boaters went boating with someone else who owns a boat.



Established Boaters

represent approximately 9.7 million people in the US. They span all ages, and a third are also established fishers.

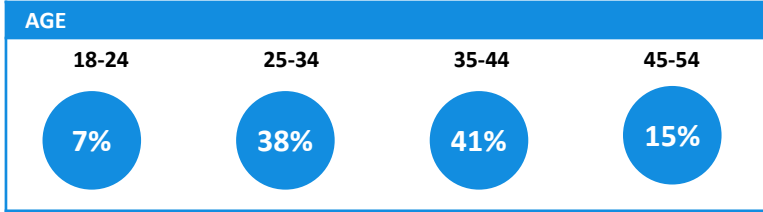
Boating provides these consumers with a number of benefits, and they especially consider boating a great stress reliever and way to enjoy the outdoors. Two in five either own a boat or purchased one this season, but many also enjoy boating on friends' boats.





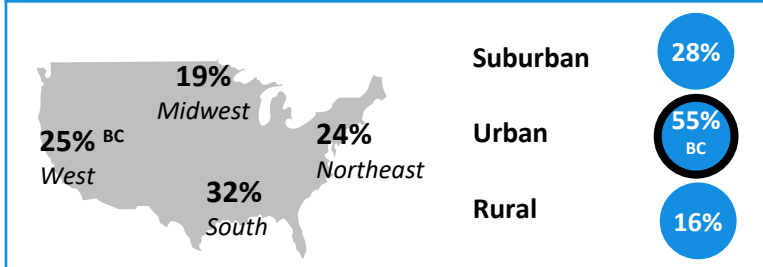
New Boaters are comprised of mostly young families and are more likely to be Hispanic than Reactivated or Established Boaters. All boaters earn a high income (\$92k+) and live across the US, though a spike of New Boaters is noticeable in the West.

NEW 2020 BOATERS (A)

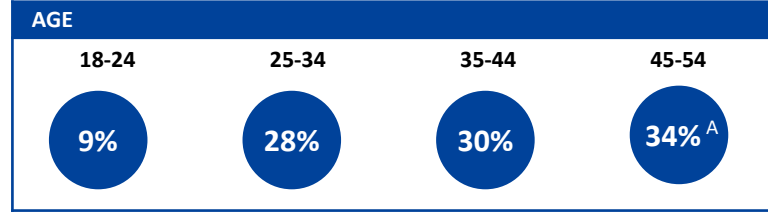


| | |
|------------------------|--------------------------------|
| GENDER – Male | 63%^{BC} |
| GENDER – Female | 37% |
| INCOME (mean) | \$97k |
| MARITAL STATUS | 73%^C Married |
| HH SIZE (mean) | 3.4^C |
| CHILDREN IN HH | 70%^{BC} |
| WHITE | 76% |
| HISPANIC | 16%^{BC} |

REGION

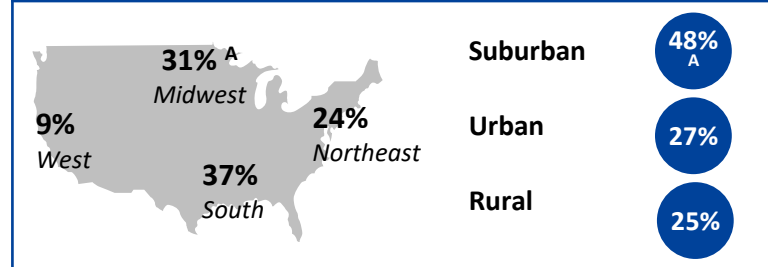


REACTIVATED BOATERS (B)

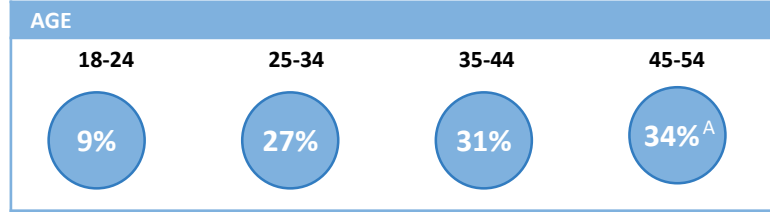


| | |
|------------------------|------------------------|
| GENDER – Male | 30% |
| GENDER – Female | 70%^A |
| INCOME (mean) | \$98k |
| MARITAL STATUS | 62% Married |
| HH SIZE (mean) | 3.0 |
| CHILDREN IN HH | 52% |
| WHITE | 90% ^A |
| HISPANIC | 6% |

REGION

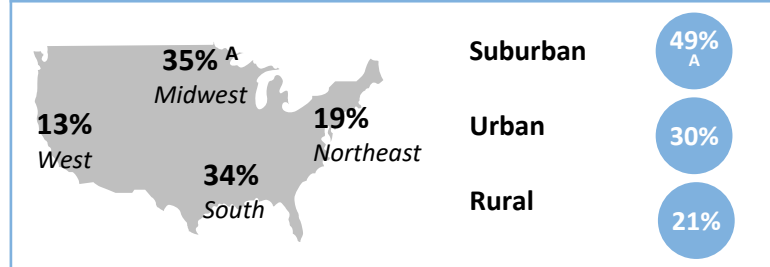


ESTABLISHED BOATERS (C)



| | |
|------------------------|------------------------|
| GENDER – Male | 39% |
| GENDER – Female | 61%^A |
| INCOME (mean) | \$92k |
| MARITAL STATUS | 58% Married |
| HH SIZE (mean) | 3.0 |
| CHILDREN IN HH | 51% |
| WHITE | 84% |
| HISPANIC | 7% |

REGION






Base: New 2020 Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104)
 RESP_AGE, RESP_GENDER, USHHI3, USMAR2, HHCMP10, KIDS02, QMktSize_US, US01ETH
 Capital letter indicates statistically greater than noted group at 95%



Reduced working hours among New and Reactivated Boaters also likely contributed to having more time to partake in boating, while many Reactivated Boaters experienced changes to their living situation which may have contributed.

“I went out a lot more this year because I lost my job due to COVID.”

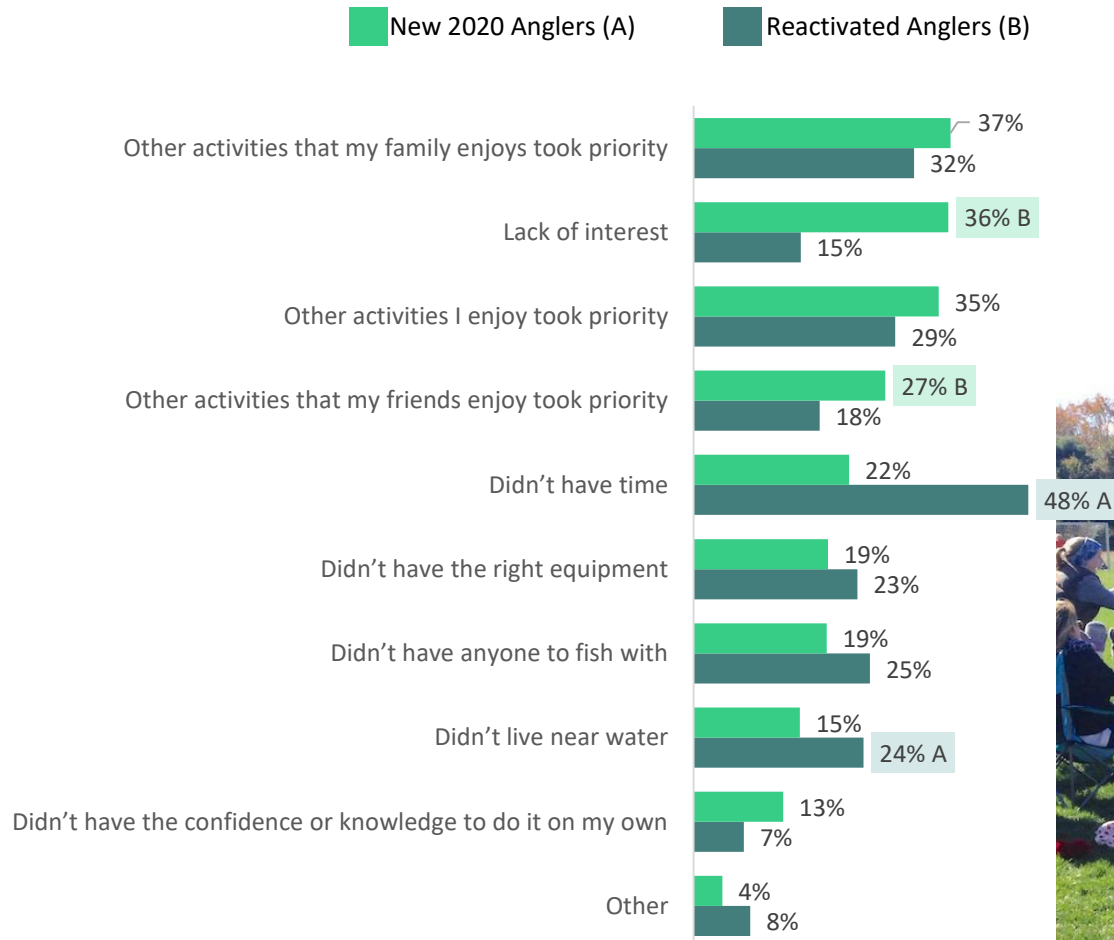
| | NEW 2020 BOATERS (A) | REACTIVATED BOATERS (B) | ESTABLISHED BOATERS (C) |
|--|----------------------|-------------------------|-------------------------|
| Jobs (Net) | 67% ^C | 62% | 52% |
|  My job hours were reduced | 29% ^C | 23% | 16% |
| I was required to work remotely | 27% | 31% | 29% |
| I have lost my job (either temporarily or permanently) | 20% ^C | 14% | 11% |
| Someone else who has been living in my household has lost their job | 19% ^{BC} | 8% | 4% |
| My pay was reduced | 22% ^C | 11% | 9% |
| Living Situation (Net) | 52% | 72% ^{AC} | 44% |
|  Some / most public places were closed | 30% | 54% ^A | 38% |
| All stores, except grocery stores and pharmacies, were closed | 22% | 38% ^A | 28% |
| I/ members of my family had to self-isolate | 17% | 17% | 13% |
| I/ members of my family were under mandatory stay at home orders | 13% | 25% ^A | 16% |
| I have relocated to another city or town due to job loss | 13% ^C | 7% ^C | - |
| Children's Situation (Net) | 31% | 31% | 34% |
|  My children had to spend more time at home | 25% | 24% | 30% |
| My children were unable to participate in regular summer activities | 17% | 25% | 23% |
| My children completed the school year via remote learning | 18% | 25% | 27% |

Capital letter indicates statistically greater than noted group at 95%
 Base: New 2020 Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104)
 COVID_1. Have any of the following happened to you as a function of COVID-19? Select all that apply.

INITIAL BARRIERS TO BOATING AND FISHING

REASONS FOR NOT HAVING FISHED PREVIOUSLY

Other activities, and lack of time were key barriers preventing New Anglers and Reactivated Anglers from participating in fishing previously. New Anglers especially, mention a perceived lack of interest and preference for other activities.



Additional Barriers

- Fear, uncomfortable with bait, fish
- Family not outdoorsy when young

"I was busy with social engagements, happy hours, parties before having kids. Just had other stuff filling my time."

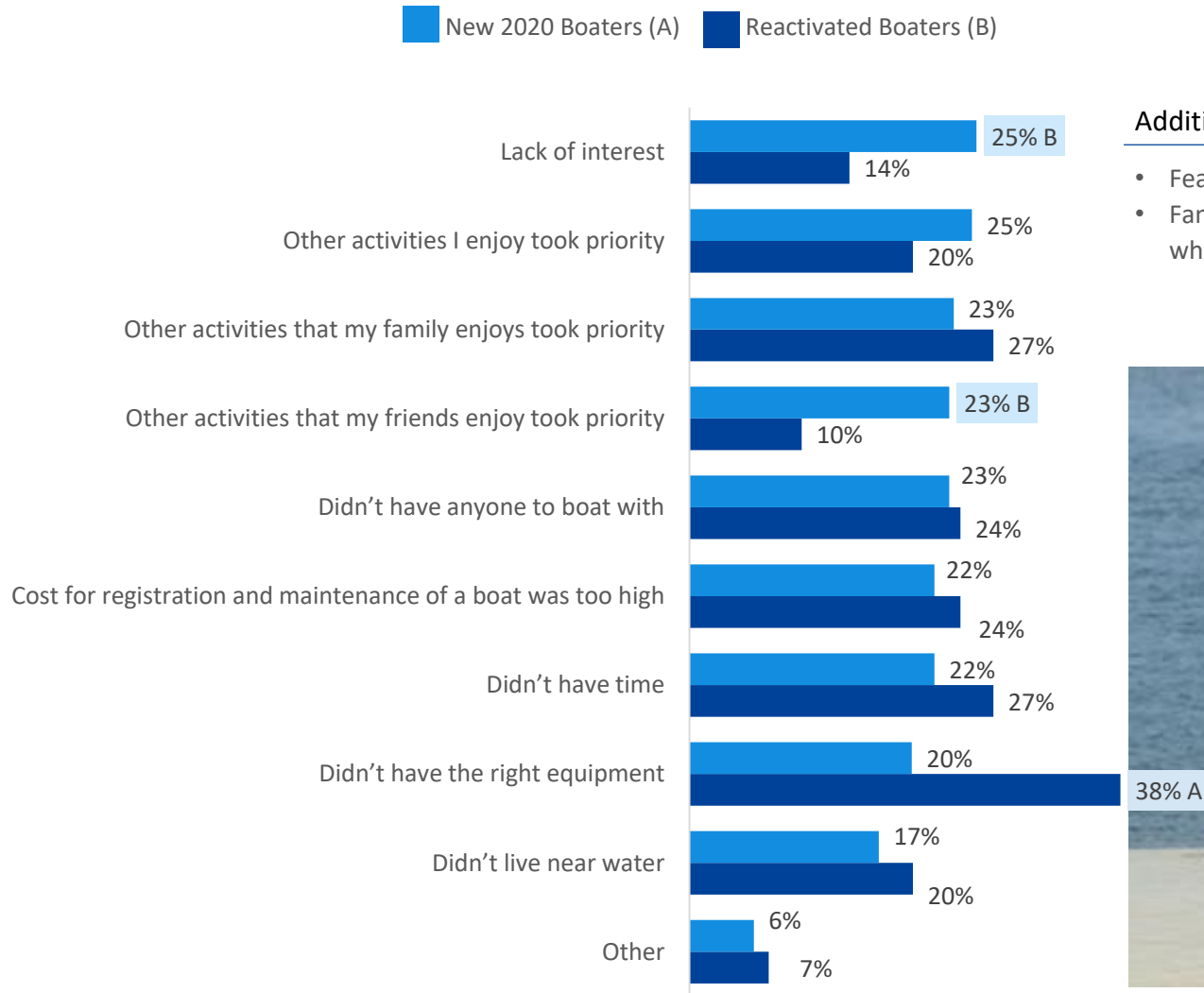
"It is a really nice sport but you must have the correct equipment."



Base: New 2020 Anglers (n=343); Reactivated Anglers (n=111)
 C1. You mentioned you have not fished in several years. When did you last fish? C2. Why have you not fished [INSERT IF MARKED AT H2 AS LAPSED FISHER in several years; INSERT IF MARKED AS NEW FISHER before this past summer]?

REASONS FOR NOT HAVING BOATED PREVIOUSLY

New and Reactivated Boaters express similar barriers as Anglers for why they haven't boated previously: lack of interest and other activities taking priority. Interestingly, time was less of a barrier overall, and Reactivated Boaters seem to have lapsed due to not having the right equipment.



Additional Barriers

- Fear, phobia of water
- Family not outdoorsy when young

"Time, money, experience, and access to a boat. If our friends sold their boat or didn't have access to it anymore that would prevent us from participating more."

"I had absolutely zero interest in boating or fishing before."

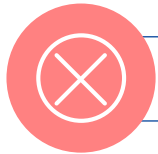


Base: New 2020 Boaters (n=245); Reactivated Boaters (n=71)
 D1. Why have you not gone boating [INSERT IF MARKED AS REACTIVATED LAPSED BOATER in several years; INSERT IF MARKED AS NEW BOATER before this past summer]?



A lack of foundational knowledge was the largest barrier for Newcomers (NCs) before their first outing this year, followed by a lack of proper gear. They are much more likely to be along for the ride and rely on the understanding of others.

The most common obstacle faced this year by ASFs was the pandemic. Some stayed home to assure their safety, while others were unable to visit their usual fishing/boating spots as they shut down. The lockdown was an initial hinderance for many, but they were able to fish and boat more freely as areas began to reopen.



Barriers to First Fishing and Boating Experience This Year

NEWCOMERS

- Unfamiliar with the basics
 - Did not understand how to control boat
 - Proper gear and techniques for fishing
 - How to clean fish
 - Unsure where to fish/boat
 - Proper attire
 - Did not have a license, where to get, unsure if even needed
- Getting seasick
- Gear issues
 - Outdated gear
 - Borrowed or had to purchase (some concern about cost)
 - Go boating with others that own (limits flexibility)

ACTIVE SOCIAL FAMILIES

- Many did not experience any obstacles in 2020
- COVID-19
 - Participating less with those outside of family
 - Desire to social distance (stayed home more)
 - Some fishing and boating locations closed
 - Some bait shops closed
- Gear issues (minority)
 - Forgot gear
 - Boat needed repair



Regulations

Although some NCs feel they understand fishing and boating regulations well, it is more common that they have no understanding, or did not and had to spend time researching them. A minority are operating without licenses and are more likely to lean on the understanding of others who are more knowledgeable.

Nearly all ASFs feel they thoroughly understand regulations.

COMMON SOURCES OF REGULATORY INFORMATION

- Experts
 - Sales associates
 - Marina staff
 - Expert fishers/boaters
 - Friends, family, spouse
- Online research
 - NOAA Fisheries
 - Take Me Fishing (RBFF)
 - National Park Service
- Local fish and wildlife department
 - YouTube
 - Blogs
- Print material (books, pamphlets)
- Fishing/boating course, licensure process



MOTIVATIONS FOR FISHING AND BOATING

WHAT HAS ENCOURAGED FISHING?

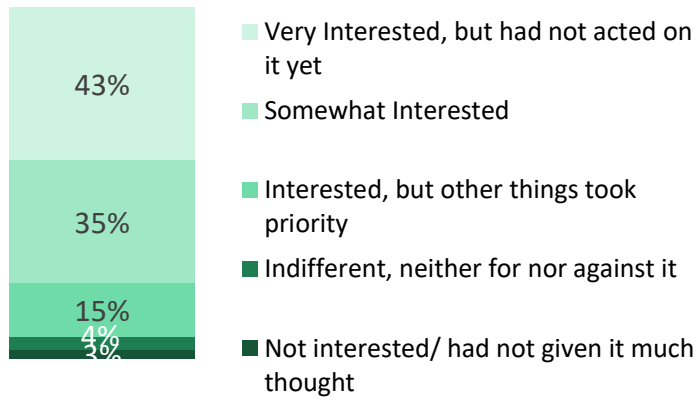
Among New Anglers, about 2 in 3 mention they were interested in fishing but simply hadn't acted on it yet. The primary driver to start fishing among New Anglers were being invited or seeing advertisements on TV, social media, magazines and blogs.



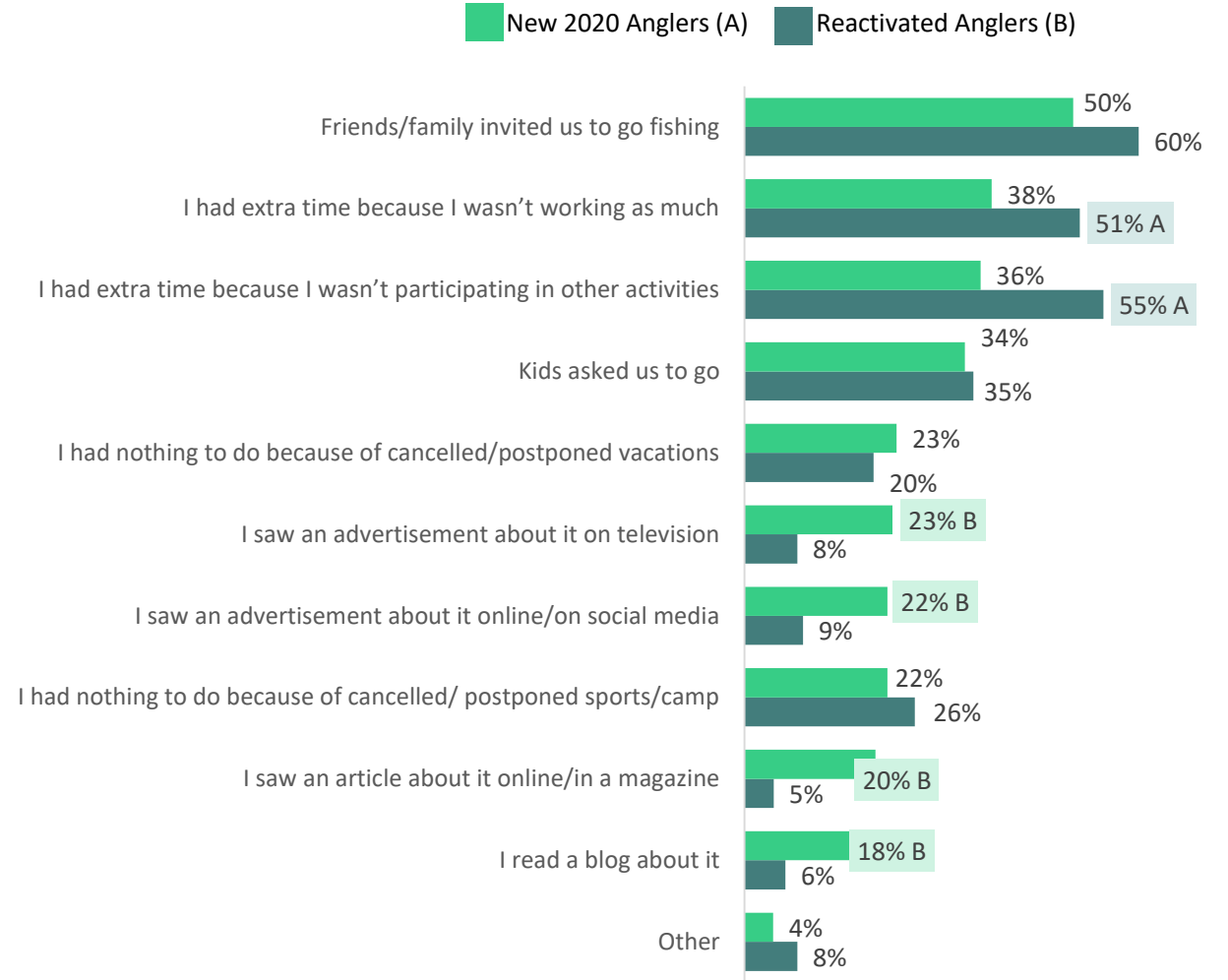
LAST TIME FISHED Among Reactivated Anglers



PREVIOUS INTEREST Among New Anglers



FACTORS THAT IMPACTED DECISION TO GO FISHING



Base: New 2020 Anglers (n=343); Reactivated Anglers (n=111)
 C1. You mentioned you have not fished in several years. When did you last fish? (Ranked to New Anglers) C3. Which of the following factors contributed to your decision to go fishing? (Rank 1) (Ranked to New Anglers) C10. Before this past summer and the impact of COVID-19, how interested in fishing were you/ your family members?
 Capital letter indicates statistically greater than noted group at 95%

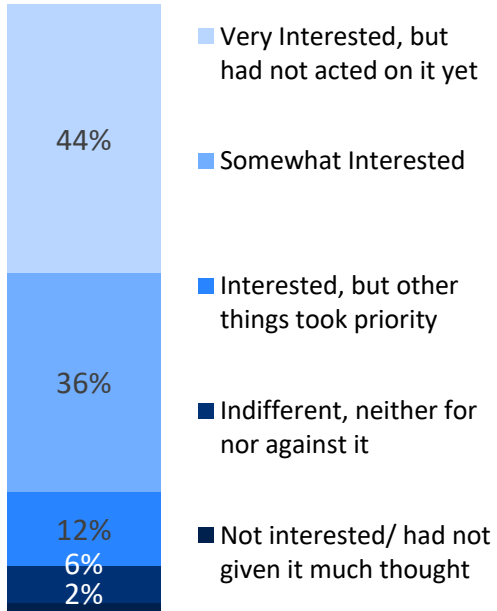


WHAT HAS ENCOURAGED BOATING?

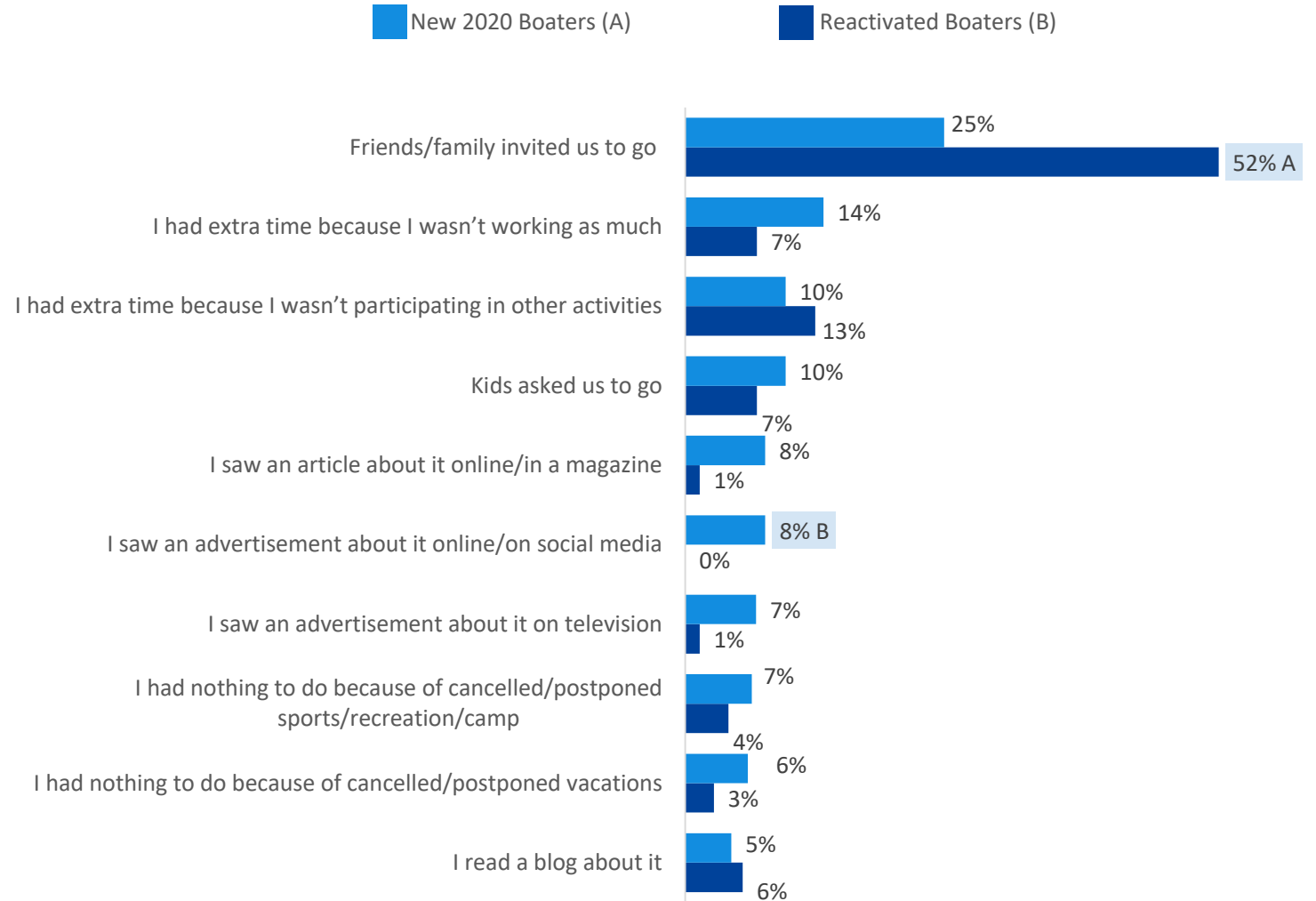


Among those who are new to boating, about 3 in 4 indicate they had been interested, but other things took priority. Being invited by friends and family, extra time and seeing advertisements were the top drivers to encourage new consumers to boating. Invitations were the primary driver for Reactivated Boaters.

PREVIOUS INTEREST *Among New Boaters*



BOATING DECISION FACTORS



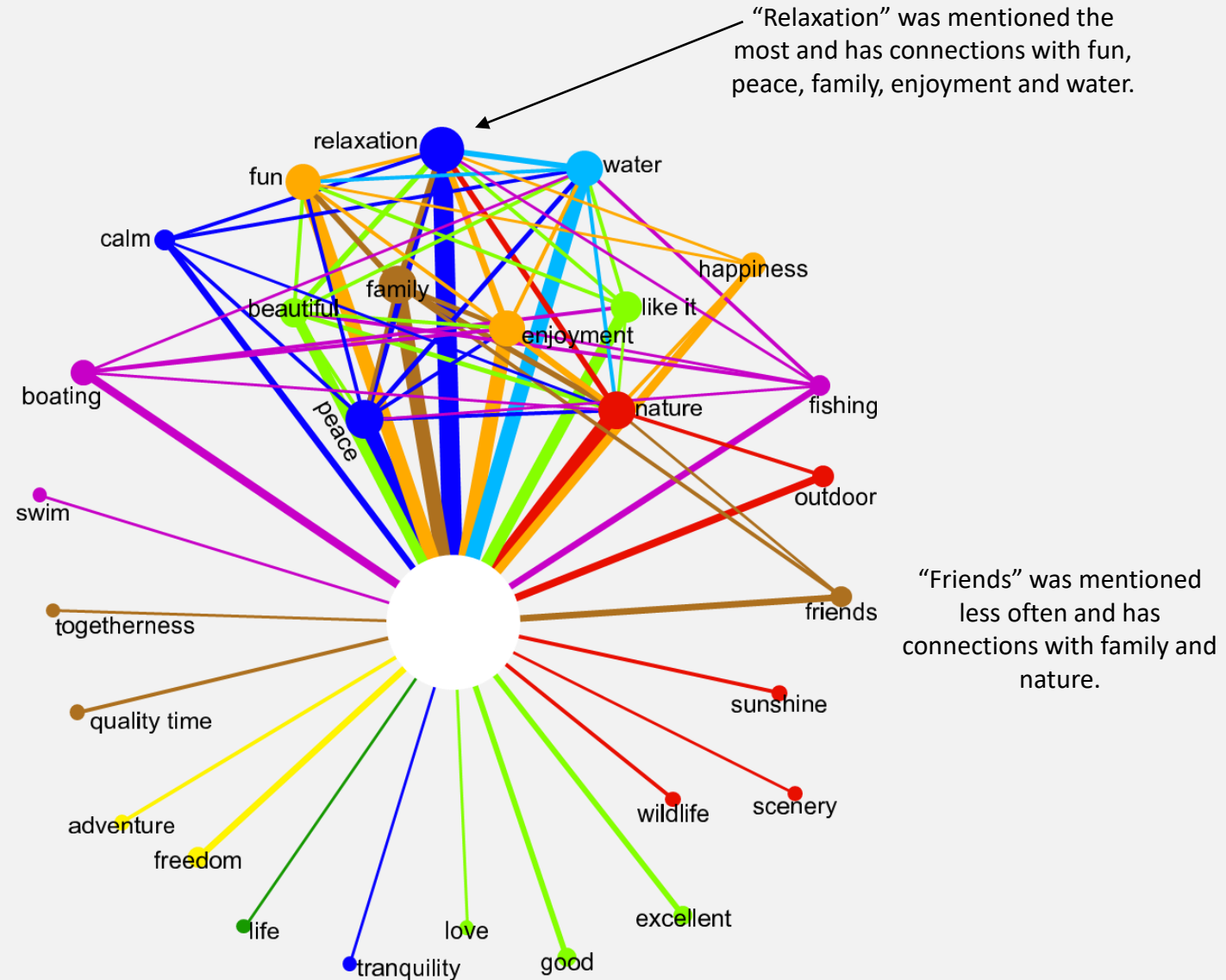
Base: New 2020 Boaters (n=245); Reactivated Boaters (n=71)
 D2. Before this past summer and the impact of COVID-19, how interested in boating were you/your family members? D16. Which of the following factors contributed to your decision to go boating? (Capital letter indicates statistically greater than noted group at 95%)



INTERPRETING THE MENTAL NETWORKS

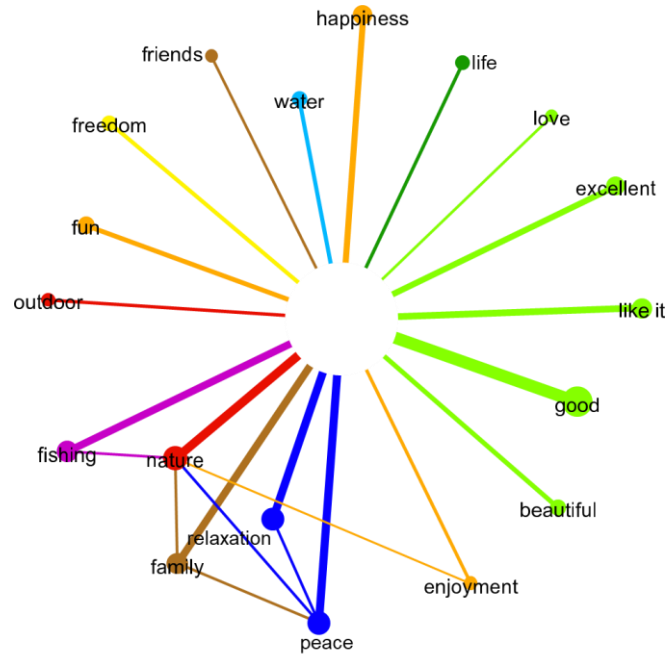
HOW TO READ THE NETWORK:

- The size of the bubble & the thickness of the line indicates number of mentions / co-occurrences
- The lines connecting bubbles indicates that those items were co-mentioned
- The distance from the center has no meaning
- Color coding represents the themes in mentions.





NEW 2020 ANGLERS



NEW 2020 BOATERS



Spark of Interest – multiple factors often sparked the interest of Newcomers to Fishing and Boating

NEWCOMERS

- Moved to a new location
 - Family member moved nearby to a body of water
 - Nearer body of water, or new friends interested in fishing/boating
- Someone else convinced them to participate
 - Other family member, significant other, friend, their child
- Started during COVID-19
 - Lockdown limited entertainment options
 - Used internet to find entertainment options available during lockdown
 - YouTube sparked interest
 - Had interest, but COVID-19 allowed for additional time to participate
 - Bought boat with canceled vacation funds

*Spending time in **nature**, with my **family**. Enjoying the **peacefulness** of it.”*

***Peace** and **tranquility**, being out in **nature** and enjoying it. Quality me time to **relax** and enjoy and be content and **happy**.”*

***Nature**, **fishing** on boats, and enjoying the **outdoors**.”*

*Ability to **enjoy nature** with the ones you love and **relax**.”*

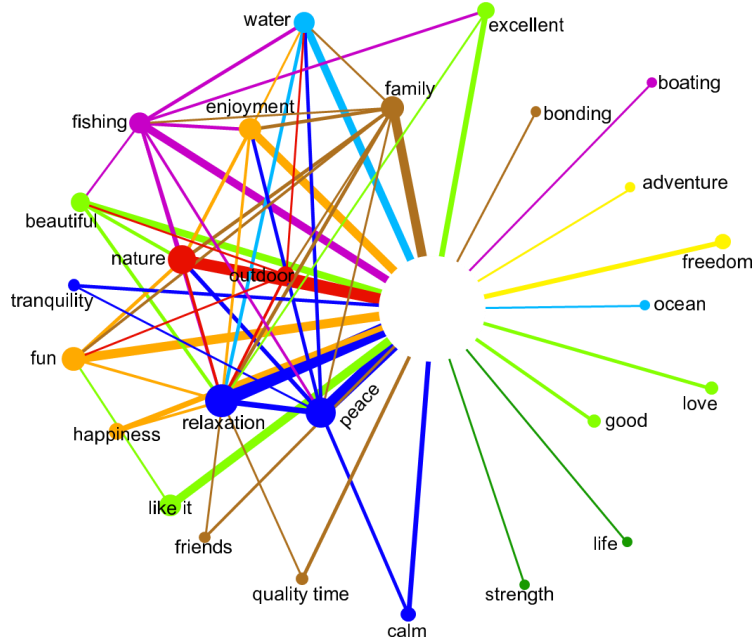
*They represent the feeling of **fun** and **friendship** I feel when **boating** as we only go boating with others. I like the feeling of being on the **water** and feeling **relaxed**.”*

***Beauty**, quality time with **friends**, **peacefulness**.”*

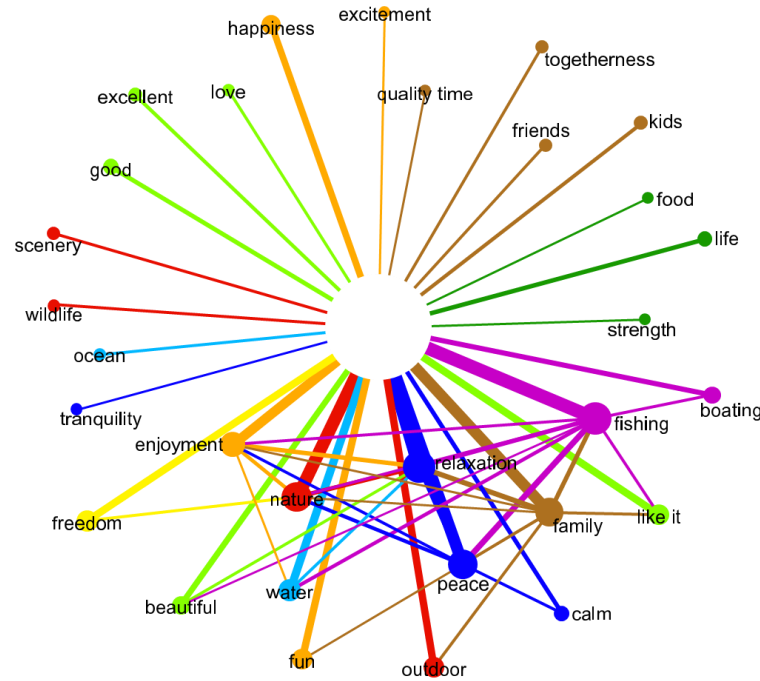




REACTIVATED ANGLERS



ESTABLISHED ANGLERS



REACTIVATED AND ESTABLISHED ANGLERS' MOTIVATIONS

- Interest Cultivated as a Child (most common)
 - Participated with family member as a child (often father, grandfather, brothers etc.)
 - Grew up near a body of water, part of life/local culture
- Interest Cultivated as an Adult
 - Tried for the first time on a vacation
 - Pulled in by friend/relative interested in fishing/boating, or significant other (who is often male)
 - Desire to try a new outdoor activity/hobby
- Media
 - Advertisements (fishing commercial)
 - Movies, documentaries, TV shows

“These pictures make me **happy**, because they remind me of the things I love about **nature** and being **outside**.”

“Excitement for the whole **family**. Spending **quality time** and making memories especially by taking pictures for the kids to later enjoy and remember that event in our lives.”

“I like to go **fishing** and **boating** because I like to spend time outside in **nature** and I love to be on and near the **water**. I also enjoy doing this with **friends**.”

“Taking the **kids** **fishing** and having some **family fun**.”

“They represent that when I fish, I feel **relaxed** and at **peace**. I am **free** and proud to provide food for my **family**.”





Although fishing/boating can be exciting, consumers continued to mention the natural setting away from daily concerns as points of differentiation between boating and fishing and other hobbies and pastimes they enjoy. One might think respondents are describing yoga as they consider unique elements of fishing and boating.

Calming natural setting promotes...

- 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."

A challenge

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

Conjures feeling of nostalgia

- Simpler times from the past

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."



A change of pace/scenery, something new (NC)

- Activity new to NCs, appear to spend less time in nature

Requires more planning (NC)

- Some NCs mention these activities require more time and advance thought to organize

Provides food (ASF)

- Utilitarian benefit, meal
- Emotional benefit, feeling of being capable

Fulfills primal instincts (minority)

- Being in nature, hunting (only mentioned by one respondent, but likely common subconscious satisfaction for others)

One unique event it brings to the table is it fulfills some kind of primal desire my kids have to be outside and fish/hunt."



Newcomers



Active Social Families/
Established Participants



“My favorite memory was the first time my son caught a fish and his pure joy and excitement from it. He wanted to kiss the fish and keep it forever. I find great joy in seeing my kids experience joy and excitement. My husband and I strive to find activities that are not only fun but help instill essential principles in our children. So part of the joy I feel is not only due to seeing the excitement they feel when they have successfully caught a fish on their own but seeing them grow in their understanding of hard work and patience when working toward a goal.”

“I think the most beautiful thing is that you feel a life, far away from the daily activities, business, stress, and day-to-day worries. Since the human being is not meant to be alone, I personally think it is a good way to share beautiful moments with your loved ones and your friends. This is a huge personal satisfaction, and I don’t want to miss it ever again. Especially now with all those pandemics you don’t know when your day will be your last day.”

“Without a doubt, that moment was the most beautiful of my life, it was a day where I went out for the last time with dad, that day he told me that we were going to go fishing (I think dad was saying goodbye to this world). We arrived at the place and spent a whole day enjoying the beautiful nature and talking stories that dad told me about when I was a child, this image represents a lot to me.”

“My favorite fishing moment is the first catch we had that we could actually take home and eat. It was a small jack smelt but it was pretty delicious. I must say it was one of the most gratifying moments of both of our lives. I mean just pure joy from the kid which just transferred to the proud pappy. Thank goodness for iPhone cameras to capture the moment. I will remember it forever.”





Similar themes develop when both Newcomers and Active Social Families recount their favorite fishing or boating experiences. They focus on social connection with loved ones, the excitement of meeting challenges, and the calming effect of nature.

Common Themes in Favorite Fishing and Boating Stories

Social Connection

love, camaraderie, acceptance, and nostalgia

- Taught by a family member as a child
- Together with family, or a new meaningful person
- Teaching a child, passing down traditions, seeing them grow as people
- Spending time with those who have since passed
- Funny stories (falling in water, etc.)

The Challenge

excitement and competency

- Catching, or almost catching their biggest fish
- Catching many fish
- First time catching a fish as a child
- Catching fish that could be eaten
- Overcoming adversity
- Learning patience
- Building mastery with gear and learning about sport

Connection to Nature

calm, freedom, and being unplugged

- Beautiful scenery
- Dusk and dawn
- Sound of lapping waves
- Peace and calm of water
- Light wind
- Wonder related to nature and wildlife
- Escaping distractions and fast pace of daily life

Social Connection—A Basic Human Need

Although some may not be able to fully articulate why they deeply value social connection, researchers have shed light on its immense importance as a fundamental building block of the human experience—as important the air we breathe.

Anthropologist, Robin Dunbar, “has found that the strongest predictor of a species’ brain size—specifically, the size of its neocortex, the outermost layer—is the size of its social group. We have big brains in order to socialize.” In fact, “just as human beings have a basic need for food and shelter, we also have a basic need to belong to a group and form relationships.”

[The Atlantic—Social Connection Makes a Better Brain](#)





Relaxation, bonding, enjoying the water, scenery and having fun are universal drivers to fishing. Interestingly, New Anglers are more likely to cite catching food, growing a personal brand and driving social media presence as additional drivers, likely due to their younger age skew.

| Agree Completely | NEW 2020 ANGLERS (A) | REACTIVATED ANGLERS (B) | ESTABLISHED ANGLERS (C) |
|--|-------------------------|----------------------------|----------------------------|
| Relaxing and peaceful | 62% | 64% | 74% A |
| A good way to create memories with friends and family | 60% | 64% | 75% A |
| I enjoy being near water | 63% | 70% | 72% |
| A nice way to spend a day | 58% | 62% | 79% AB |
| I enjoy looking at the scenery | 54% | 67% A | 77% A |
| Is fun | 55% | 60% | 76% AB |
| Helps me get away from my usual routine | 59% | 63% | 71% A |
| A good way to reduce stress | 57% | 60% | 74% AB |
| Takes me away from electronics | 54% | 59% | 69% A |
| A safe activity to enjoy during these times | 53% | 58% | 62% |
| A great way to keep busy when other activities/ sports are not available | 51% | 56% | 61% A |
| A great way to enjoy the outdoors | 57% | 65% | 77% AB |
| An approachable activity for the whole family | 48% | 50% | 61% A |
| Helps me recharge | 52% | 51% | 58% |
| A great way to social distance | 50% | 45% | 55% |
| Something my family enjoys | 50% | 50% | 61% A |
| Makes me feel invigorated and adventurous | 48% | 40% | 58% B |
| Allows me to catch and prepare food for my family | 47% B | 28% | 54% B |
| Allows me to grow my personal brand or image of being outdoorsy | 44% BC | 23% | 32% |
| Is great for my social media/online presence | 39% BC | 20% | 26% |

Base: Participated in Fishing or Boating: New 2020 Anglers (n=343); Reactivated Anglers (n=111); Established Anglers (n=140)
 B10. Thinking about why you go fishing, how much do you agree with the following statements? (TB/T2B) (Ranked to New Anglers T2B)
 Capital letter indicates statistically greater than noted group at 95%

BOATING MOTIVATIONS (AIDED)



Relaxation, being near water and having a nice day, making memories are universally, the motivations for all boaters. New Boaters are also motivated by the ability to catch dinner and impact their personal social media presence. For Established Boaters, all motivations are greater, likely contributing to why they continue to boat.

| | NEW 2020 BOATERS (A) | REACTIVATED BOATERS (B) | ESTABLISHED BOATERS (C) |
|---|-------------------------|----------------------------|----------------------------|
| Agree Completely | | | |
| Relaxing/peaceful | 56% | 49% | 67% AB |
| A nice way to spend a day | 56% | 65% | 75% A |
| A good way to create memories with friends and family | 59% | 56% | 73% AB |
| I enjoy being near water | 59% | 70% | 71% A |
| Helps me get away from my usual routine | 55% | 54% | 71% AB |
| I enjoy looking at the scenery | 52% | 75% A | 72% A |
| Is fun | 52% | 52% | 73% AB |
| A good way to reduce stress | 51% | 48% | 69% AB |
| A great way to enjoy the outdoors | 56% | 66% | 74% A |
| An approachable activity for the whole family | 49% B | 31% | 49% B |
| A great way to keep busy when other activities/sports are not available | 47% | 34% | 60% AB |
| A safe activity to enjoy during these times | 47% | 42% | 61% AB |
| Something my family enjoys | 49% | 51% | 64% AB |
| Helps me recharge | 50% B | 35% | 57% B |
| Makes me feel invigorated and adventurous | 47% B | 24% | 54% B |
| Takes me away from electronics | 49% | 45% | 64% AB |
| A great way to social distance | 46% | 37% | 51% |
| Allows me to catch and prepare food for my family | 45% B | 24% | 38% |
| Allows me to grow my personal brand or image of being outdoorsy | 40% B | 20% | 30% |
| Great for my social media/online presence | 40% BC | 17% | 26% |

Base: Participated in Fishing or Boating: New 2020 Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104)
 B10. Thinking about why you go boating, how much do you agree with the following statements? (TB/T2B) (Ranked to New Boaters T2B)
 Capital letter indicates statistically greater than noted group at 95%

GEAR AND PRE-TRIP BEHAVIORS



Majority of New Anglers purchased a license online, while some also purchased at Walmart or a bait/tackle shop. A greater number of Reactivated Anglers did not purchase a license. Reasons for not purchasing vary, but include not needing one on certain days, lifted laws or feeling as if 'catch & release' made them exempt to needing one.

2020 LICENSE PURCHASING

■ New 2020 Anglers (A) ■ Reactivated Anglers (B) ■ Established Anglers (C)

Yes, Purchased (Net)



Yes, I purchased one online



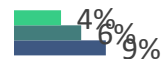
Yes, I purchased one at a Walmart



Yes, I purchased one at a bait/tackle shop



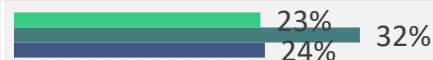
Yes, I purchased one at a sporting goods store



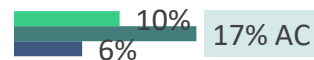
Yes, I purchased one at a gas station



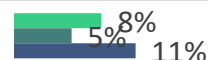
No, Didn't Purchase (Net)



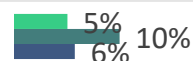
No, I didn't purchase one



I had an active license



Someone else I was with had one



Other



REASONS FOR NOT PURCHASING



I didn't know I needed one.

It was a free fishing day; a license wasn't needed.

I don't agree with the idea that people who fish recreationally need to buy a license.

Didn't need one for where we fished.



Law lifted due to COVID.

I don't feel like I need to pay for a license when I'm not keeping the fish because I'm not doing anything that takes away from the environment.

Just don't do it enough to think I needed one.



It cost money.

Catch and release little perch from shore. I do get a license when we've traveled to the coast or done serious fishing, like tidal or deep sea.

I was fishing on my own farm pond.



Base: New 2020 Anglers (n=343); Reactivated Anglers (n=111); Established Anglers (n=140)
 C5. Before you went fishing, did you purchase a license? (Ranked to New Anglers) C5a. Why didn't you purchase a fishing license?
 Capital letter indicates statistically greater than noted group at 95%





Newcomers often want to purchase their first of a specific piece of gear, or an upgraded version, as they currently have an old or beginner level model. A minority of them are at such a novice level they feel unsure what equipment would be useful or have no desire to acquire any (just use others’).

Most ASFs already own their gear, so are more likely to replace something they have for a better version. They are more likely than Newcomers to desire advanced gear (fish finders, etc.).



Fishing Gear

- Fishing rod/reel
- Fish finder
- Tackle
- Misc. accessories
- Scaler
- Specialized gear (special rod/reel, ice auger, tip-up, kite fishing gear, outriggers, etc.)



Boating Gear

- Boat, kayak, etc.
- Mirror extenders for maneuvering boat trailer
- Water sport or inflatable gear
- New motor
- Underwater camera



Clothing

- Jacket
- Boots

Common brands mentioned

Rapala, Shimano, Zebco, and Ugly Stik

I need a decent fishing pole. Some lures. Honestly, I don't know besides that."

Brand Preferences and Research

Many NCs are not at the stage of having strong brand preferences. Both would utilize a host of resources to learn about and research gear purchases, but ASFs would explore a wider range of online resources.

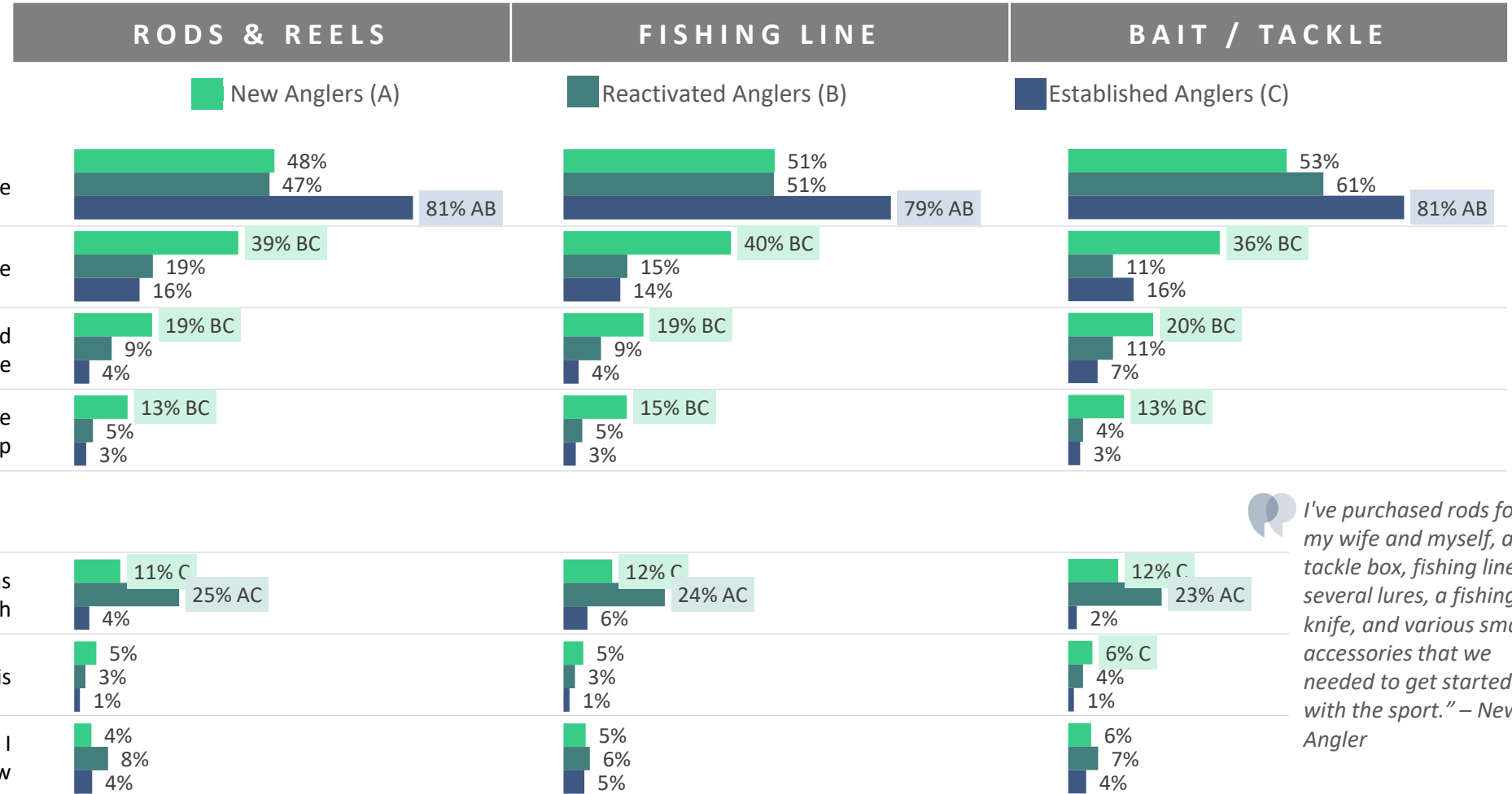
- Browsing and sales associates at sporting goods retailer
- Experts
- Print material
- TV shows
- Online
 - Amazon comparison, user reviews
 - Various websites, forums, blogs, manufacturer’s websites
- Print catalogs

Honestly, no specific brands in mind. I guess I prefer to look around and when I find the right one, I will get it."





Rods and reels/ line and tackle were similarly purchased from retail stores followed by online. Established Anglers are the group most likely to own equipment, having purchased it from a retail store. For New Anglers, some also purchased from second-hand stores or resale websites, or opted to borrow from others, ensuring they weren't wasting money.



I've purchased rods for my wife and myself, a tackle box, fishing line, several lures, a fishing knife, and various small accessories that we needed to get started with the sport." – New Angler

Base: New 2020 Anglers (n=343); Reactivated Anglers (n=111); Established Anglers (n=140)
 C9. Thinking about the rods, reels, lines, bait, etc. that you need when fishing, please tell us where you got the equipment needed.
 Capital letter indicates statistically greater than noted group at 95%



Newcomers spent dramatically less on gear this year than ASFs with over a third indicating they did not spend any money. This coincides with Newcomers renting or borrowing gear much more often than ASFs. Many prefer to rent/borrow boats and fishing gear while their interest and participation levels are low.

Why Borrowing/Renting Attractive

- New, first time trying, interest minimal, unsure if will enjoy
- Visiting others away from home, needed gear
- Normally use friend's boat, but COVID
- Do not participate enough
- Financial hardship (due to COVID-19, etc.)
- Borrowed to see if liked gear
- Boat issues
 - Bad investment
 - Expensive, plus marina costs
 - Maintenance
 - Would not use often enough to justify ownership
 - Storage space needed

Gear Rented/Borrowed

- Boating Gear
 - Boat, kayak, canoe
 - Life jackets
 - Innertube
- Fishing Gear
 - Rod/reel
 - Tackle (lures, line, etc.)
 - Tackle box

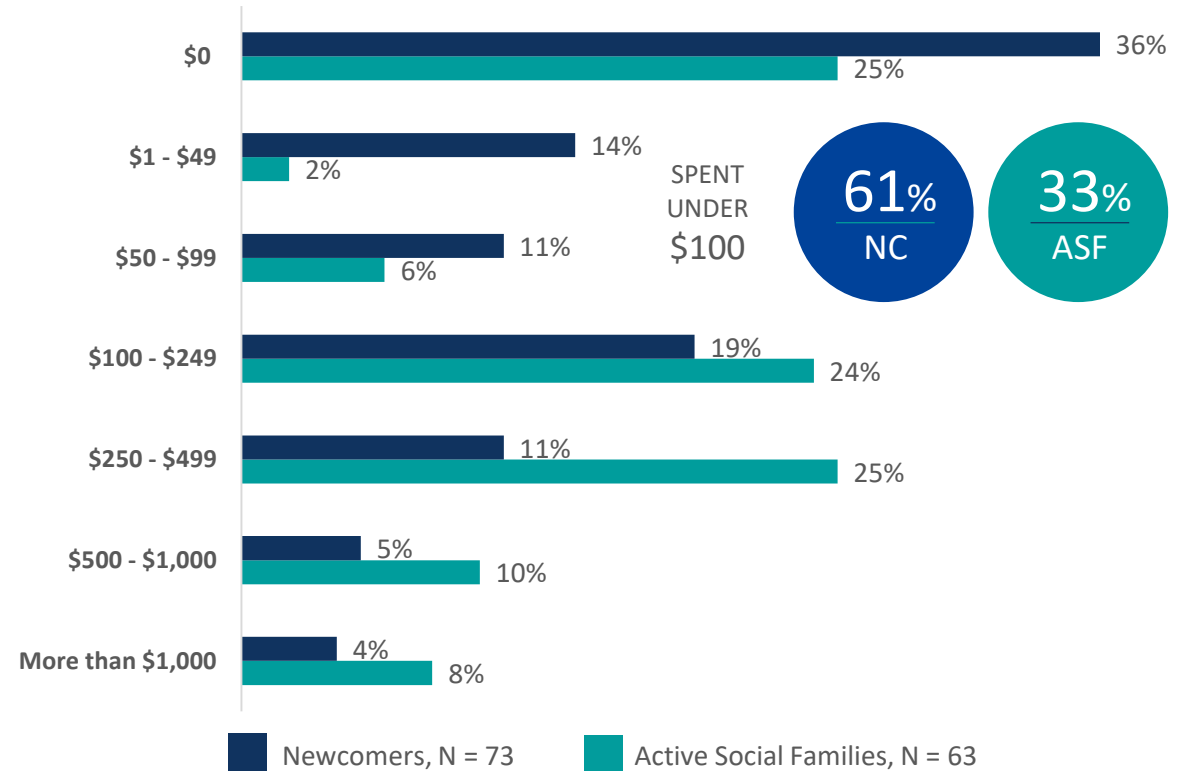
Factors That Could Motivate Purchase

- Attractive pricing, sales
- Significant other was interested in participating
- Can justify the expense
 - Enjoy the activity enough
 - Participate often enough

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."

Amount Spent on Fishing/Boating Gear This Year

Does not include cost of rentals





Amazon was a top retailer for fishing and boating purchases made this year. They offer a broad range of products, customer reviews, and quick, free delivery through prime.

Newcomers are more likely to have shopped for used gear (eBay, Craigslist, second-hand shop). This could indicate a desire to save money while assessing their interest, or that of their children.

Retailers Commonly Shopped for Gear

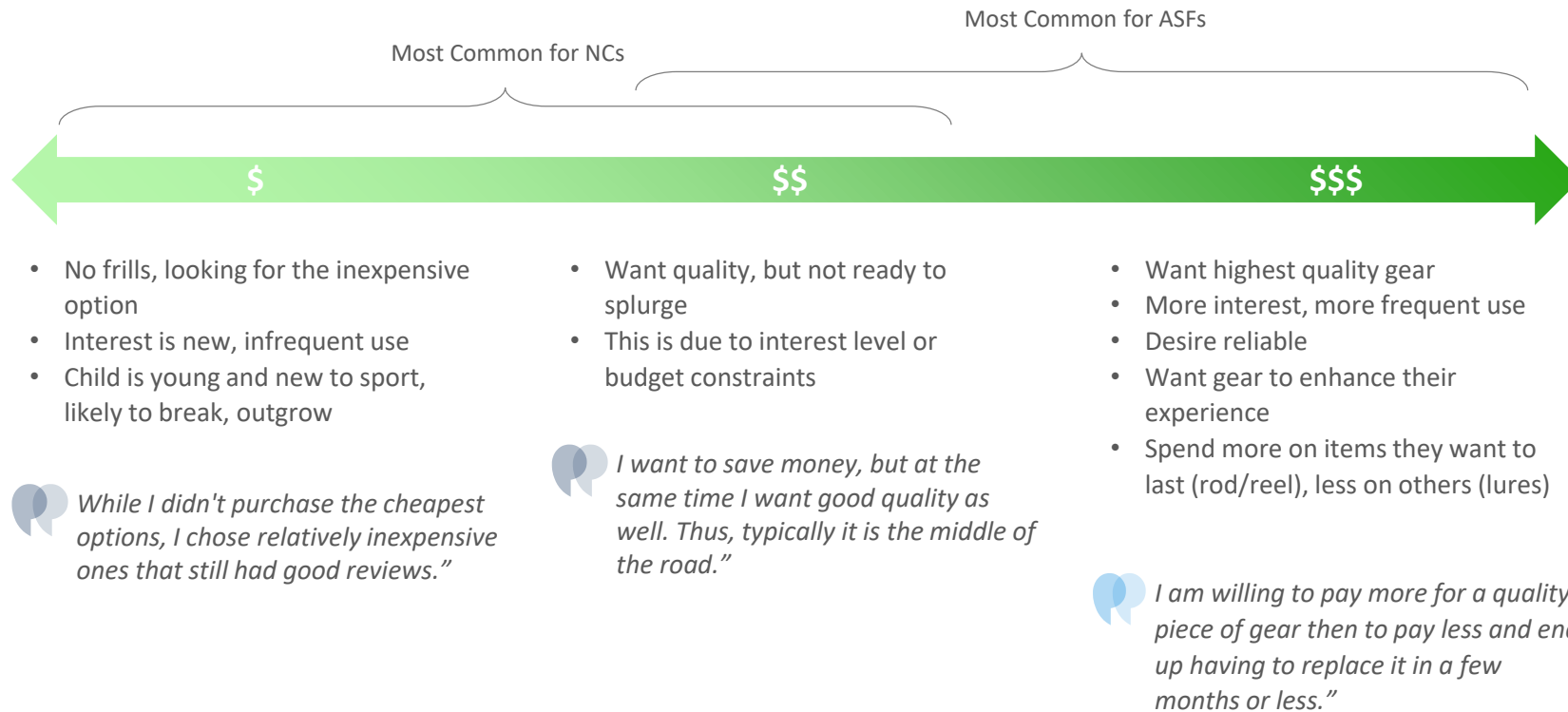




Some Newcomers desire high quality products and are willing to pay for them, but the largest portion usually purchase items that are low-end to mid-tier. They want bang for their buck as their interest level and frequency of use is still low.

ASFs focus more on quality and tend purchase gear that is mid- to upper-tier. Some spend as much as their current budget will allow, which can vary at times.

Determining the “Right Amount” to Spend



Budget for or spend as needed?

Some large purchases (boat, etc.) would require meticulous saving over time, but most will spend money on fishing and boating gear and outings as the need arises. ASFs are more likely to have a recreation budget, or a specific fishing/boating budget as they participate more frequently.

I do purchase as the need arises. I do not budget for fishing items. I do not overspend or purchase large amounts of fishing and boating equipment."

I will always make a way for fishing and boating to be in my personal budget. It is part of my life and hobby, and I could not do without it."

Discussion Board 3, Q6. Think again of the money you’ve spent on fishing and boating gear this year (both purchases and/or rentals). How do you determine the right amount of money to spend on an item instead of a more expensive or less expensive alternative?

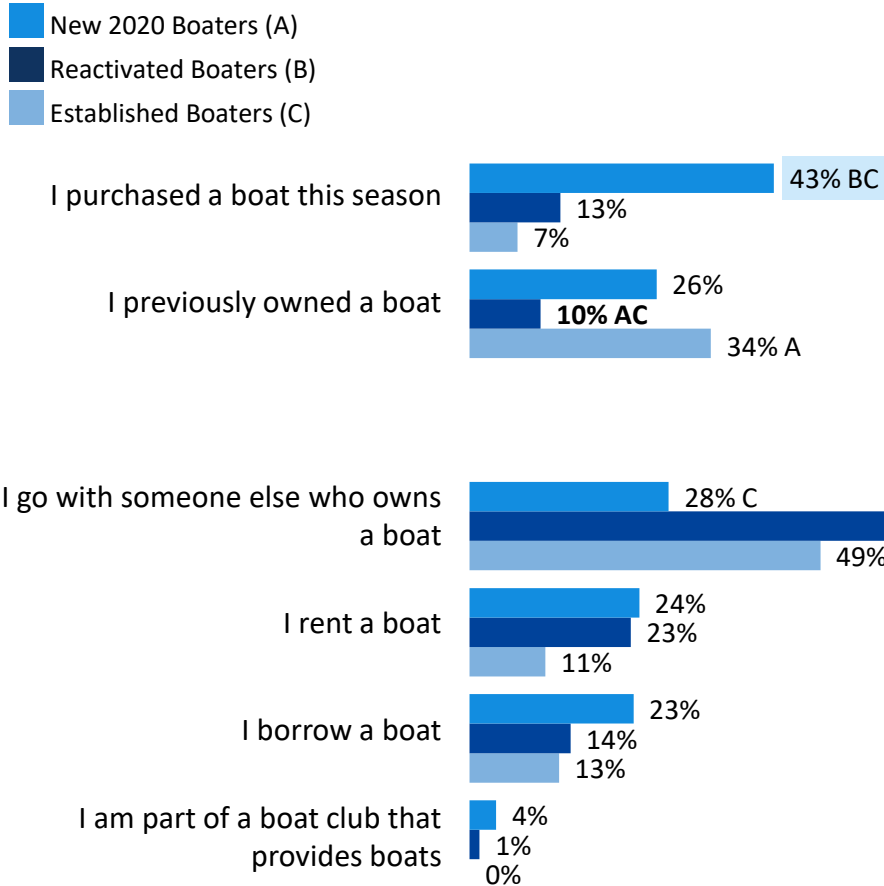
Discussion Board 3, Q7. Thinking to the future is boating and fishing something that you’re going to factor into your personal budget? This could mean saving up, or an allocation for spending each month. Or will you just make purchases as the need arises?





Just fewer than half of New Boaters purchased a boat this season. They found information through google, boat shows, friends/ family and websites for manufacturers and dealers. Many boaters go boating with friends who own boats and about a quarter indicate they have rented boats.

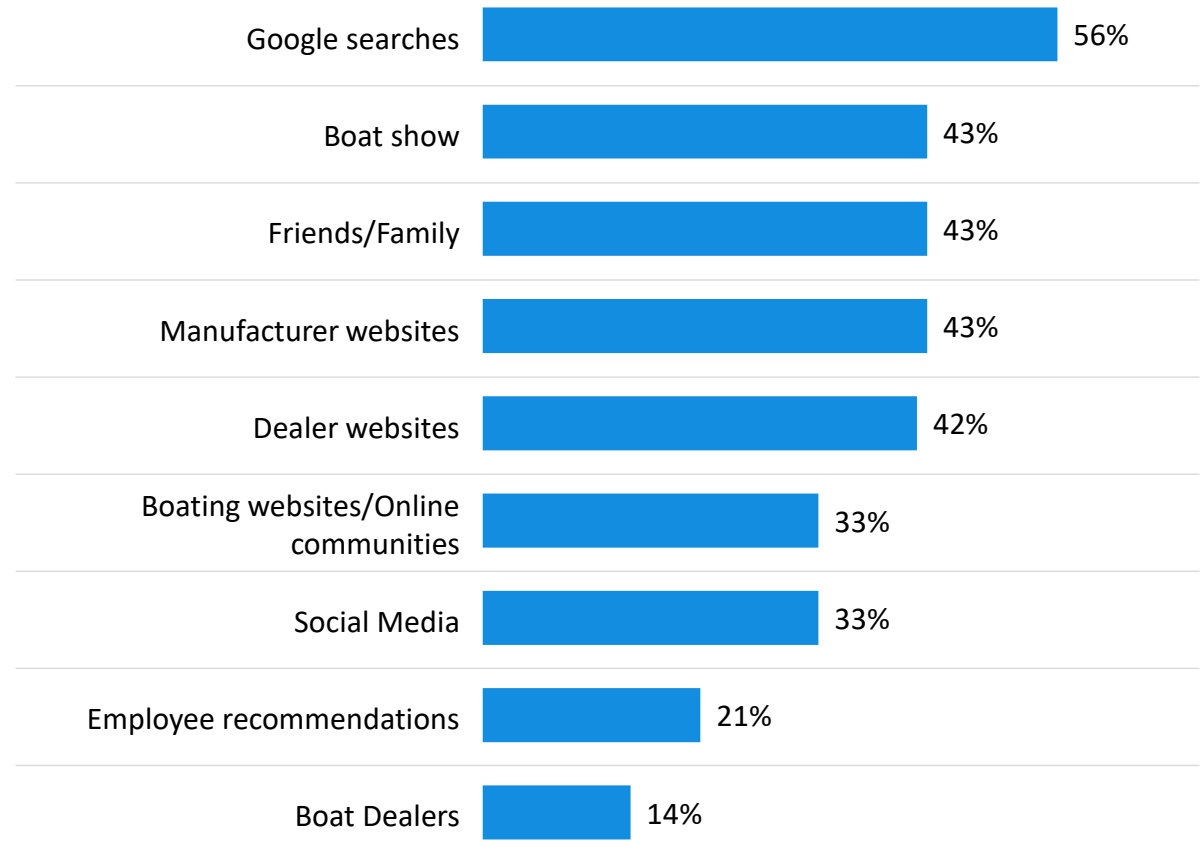
BOAT OWNERSHIP/ USAGE



We bought EVERYTHING this year. The boat, new life jackets, drink cozies, bolsters, ropes, new tube to tow, a new tow rope for the kneeboard.” – New Boater

INFORMATION SOURCES

Among New Boaters who Purchased a Boat this Season



Base: New 2020 Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104); Bought A Boat This Season: New 2020 Boaters (n=104); Reactivated Boaters (n=9*); Established Boaters (n=7*); D3. When going boating, where do you get the boat you use? D4B. What was your primary source for boat shopping and selection? (Ranked to New Boaters) Capital letter indicates statistically greater than noted group at 95%





Almost all New and Established Boat Owners registered their boat. About half of New Boaters are also operators, more so than Reactivated and Established Boaters, who are more likely to be passengers.






Most New Boaters learned to operate a boat through a combination of dealership classes and being taught by others. Established Boaters are less likely to have learned from a dealership.

BOAT REGISTRATION – Among Boat Owners

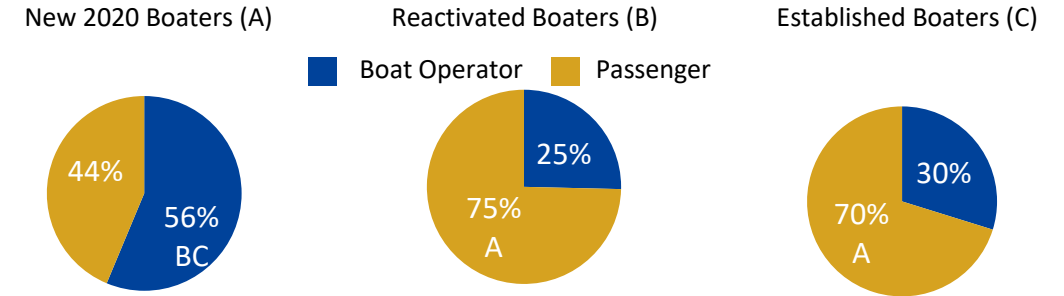
92% Of New Boaters Registered their Boat

93% Of Established Boaters Registered their Boat

TOP BOATS OWNED

-  Bay Boat/ Flats Boat
-  Fish-and-ski Boat
-  Pontoon Boat
-  Freshwater Fishing Boat
-  Canoe/ Kayak

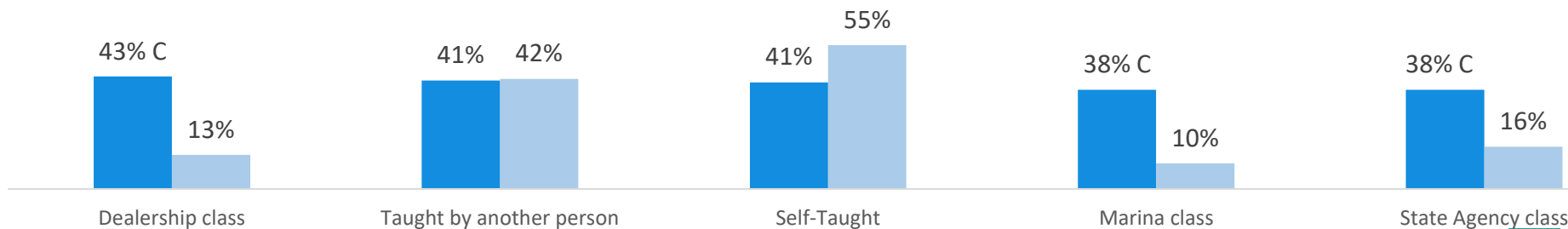
TYPICAL ROLE



| AGE | % OPERATORS | | |
|-------|---------------------|----------------------------|-----------------------------|
| | New Boaters (n=138) | Reactivated Boaters (n=18) | Established Boaters (n=31*) |
| 18-24 | 4% | N/A | 6% |
| 25-34 | 47% C | N/A | 23% |
| 35-44 | 41% | N/A | 42% |
| 45-54 | 9% | N/A | 29% A |

LEARNED TO DRIVE A BOAT – Among Boat Operators

■ New 2020 Boaters (A) n=138
 ■ Established Boaters (C) n=31



Some NCs prefer not to operate the boat as they want to just enjoy the ride or feel their skillset is too limited.

"I'm still a novice and steering in tight quarters is still difficult for me, especially when there is high wind or the water is a bit rough."

*Caution, low base size; Reactivated Boat Owners and Reactivated Boat Operators not shown due to low base <20
 Base: New 2020 Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104);
 D8. Did you register your boat? D9. And, are you typically a passenger or the operator? D13. Where did you learn to drive a boat? (Ranked to New Boaters)
 Capital letter indicates statistically greater than noted group at 95%



TRIP DETAILS



Day starts before sunrise, ends after sunset. Warm weather, no rain, breeze, cloudy or overcast."

START OF DAY

- Start early to very early in the morning, then lasts most of the day (minority prefer late morning, more NCs)
 - 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.), but sometimes specific places they could travel to

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

Once we find the perfect spot, we sit there and chill for some time with the music going via Bluetooth speaker. 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. Of course, there are adult drinks available along with snacks and sandwiches."



THE SQUAD

- Common to go with friends, but family is most common. Solo is least common.
- Family is common for NCs, but less of a focus than for ASFs.

Family and friends...I much prefer having others with me for life's experiences and this is the same."

SUPPLIES

- Items for Meals
 - Drinks (soda, energy drinks, alcohol)
 - Snacks (chips, cookies, sweets, jerks, etc.)
 - Sandwiches
 - Protein bars
 - Hotdogs
 - Bread
 - Caught fish
 - Necessary equipment to cook with
- 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)

We have the boat and fishing poles, sandwiches and chips. We also take a speaker and some books to read with the kiddos."

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."



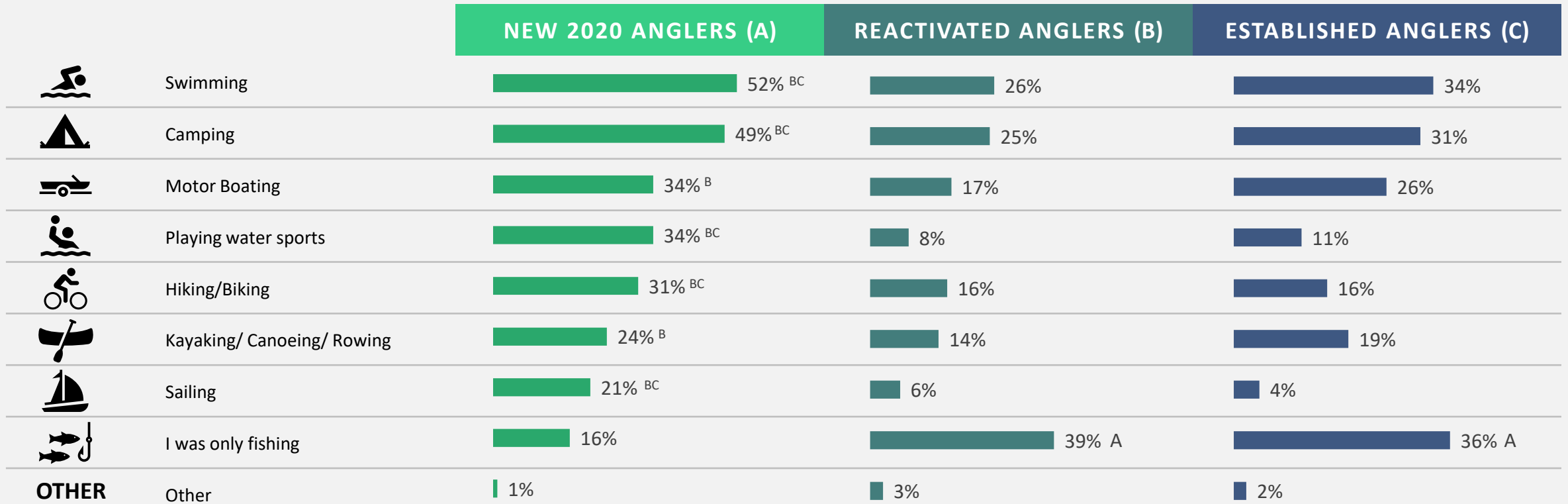
The perfect trip starts with my wife and kid actually getting up on time and ready to head out by at least 7am, which never happens. We would ideally meet up with my friends and their family and we would probably decide on a site with camping and fishing. Typically, we each bring a dish or two and drinks to share around for that day and top as we head down to the site. We don't really bring much music or tech as it's more about enjoying nature, but we all have kids, and their attention spans suck so normally there's a video game or tablet that gets brought along. We typically make our trips 2 days, 1 night as the kids can't last any longer than that normally. We get there early set up camp have some lunch, go fishing, then walk around a bit and end the evening with drinks. The next day it's early morning fishing, lunch, then packing up to leave. Fortunately, my friends are into fishing the same way I am, for the bonding and family time so I don't have to worry about any arguments about us not fishing enough or taking it too seriously."



ADJACENT ACTIVITIES TO FISHING



For most Newcomers, fishing represented just part of the outing and most New Anglers were much more likely to also be swimming, camping, boating, playing water sports and hiking. Significantly more Reactivated and Established Anglers were only fishing.

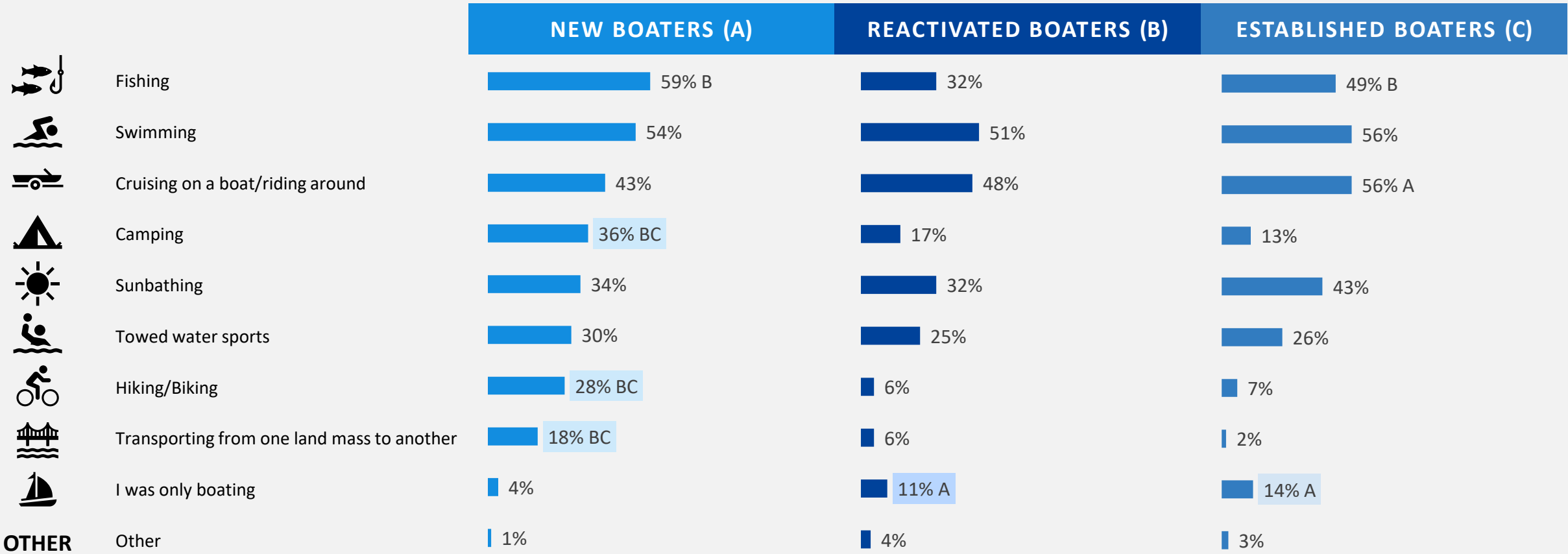


Base: New 2020 Anglers (n=343); Reactivated Anglers (n=111); Established Anglers (n=140)
 C4. While you were fishing, were you doing anything else? (Ranked to New Anglers)
 Capital letter indicates statistically greater than noted group at 95%



Likewise, over half of New Boaters were also doing something else, especially fishing and/or swimming when they went boating. Camping, hiking and for use as transportation were other common adjacent activities. It is more common that Established Boaters were just ‘riding around.’

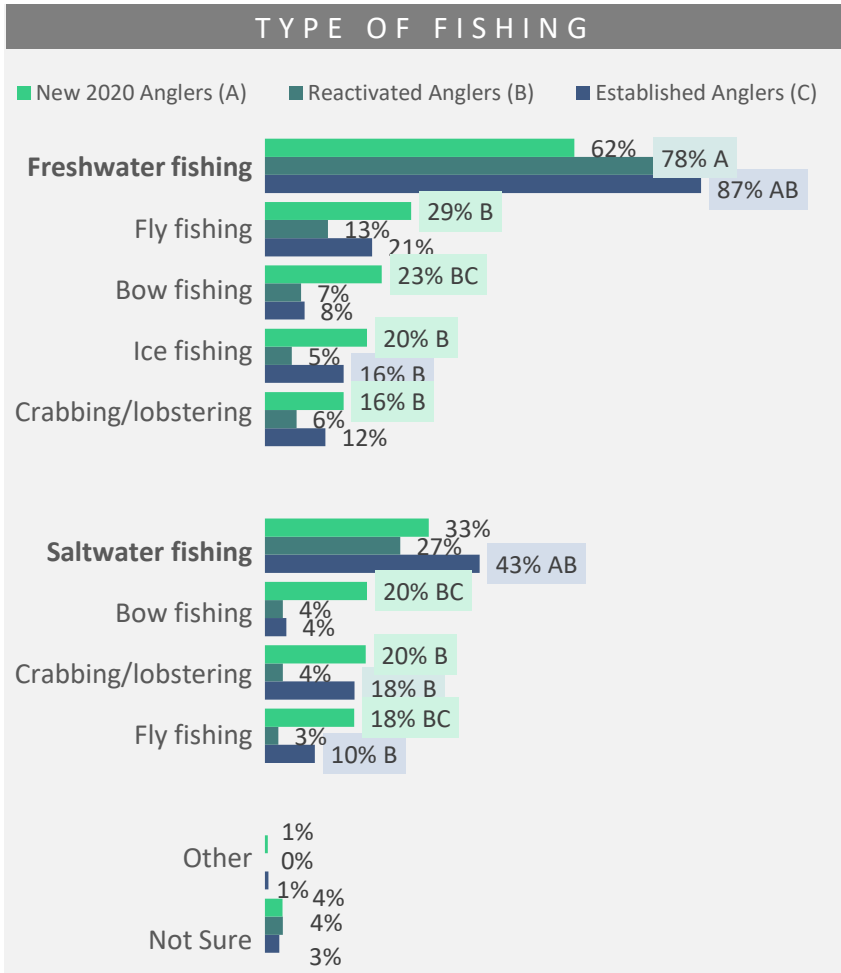
I actually loved the fact that once I learned how to use a boat, it could be a camping activity I could throw in for fun.”



Base: New 2020 Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104)
 D7. While you were boating, were you doing anything else?
 Capital letter indicates statistically greater than noted group at 95%



New Anglers partook in the most varied types of fishing while Reactivated Anglers mostly did freshwater fishing, and Established Anglers did both fresh and saltwater fishing. Majority of Anglers traveled less than an hour and went fishing at least twice per month; New Anglers went up to 4 times per month and usually with other people who had a mix of experience. It is most common for Established Anglers to fish alone.

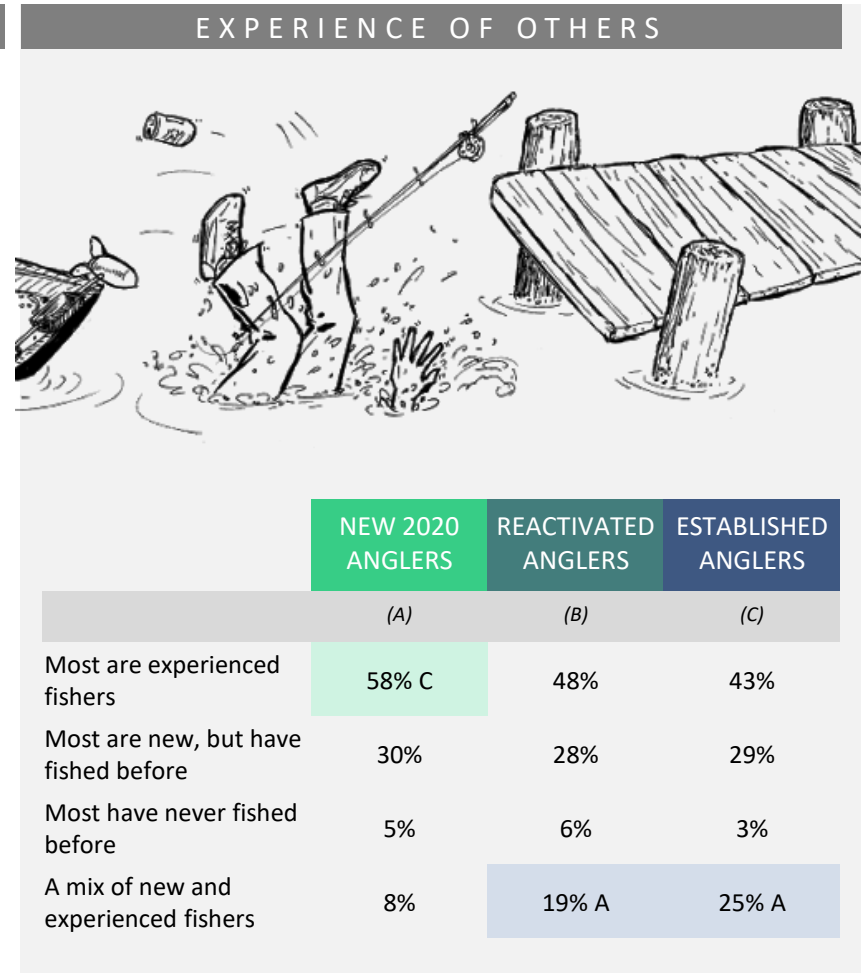


DISTANCE, FREQUENCY & COMPANY

| | NEW 2020 ANGLERS | REACTIVATED ANGLERS | ESTABLISHED ANGLERS |
|----------------------|------------------|---------------------|---------------------|
| | (A) | (B) | (C) |
| Less than 1 hour | 67% | 60% | 68% |
| 1-3 hours | 29% | 32% | 25% |
| 3+ hours | 4% | 8% | 7% |
| # Of Times Per Month | 4 ^{BC} | 2 | 3 ^B |

COMPANY

| | NEW 2020 ANGLERS | REACTIVATED ANGLERS | ESTABLISHED ANGLERS |
|-------------------|------------------|---------------------|---------------------|
| | (A) | (B) | (C) |
| I go alone | 26% | 17% | 33% B |
| Children | 60% BC | 44% | 48% |
| Significant other | 47% | 48% | 56% |
| Friends | 42% | 37% | 56% AB |
| Other family | 22% | 31% | 38% A |
| Grandchildren | 11% B | 5% | 6% |
| Organization | 4% | 1% | 1% |
| Other | 0% | 1% | 1% |

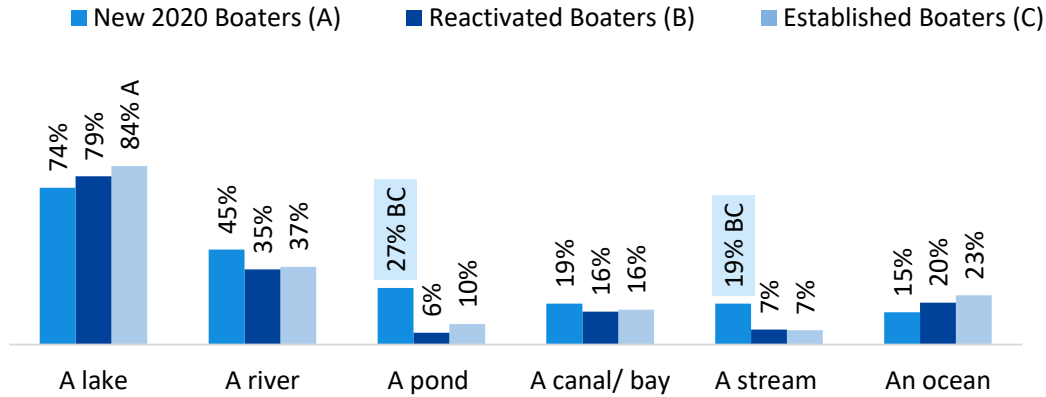


Base: Fished in P6M: New 2020 Anglers (n=343); Reactivated Anglers (n=111); Established Anglers (n=140)
 C12. How often did you fish in the past 6 months? (Ranked to New Anglers) C13. Do you fish seasonally or year-round? C14. What type(s) of fishing have you participated in? C16. And, how far did you travel to fish? C17. When you go fishing, who do you go with, if anyone? (Ranked to New Anglers) C18. And, thinking about who you have gone fishing with, what is their level of experience mostly? (Ranked to New Anglers)
 Capital letter indicates statistically greater than noted group at 95%

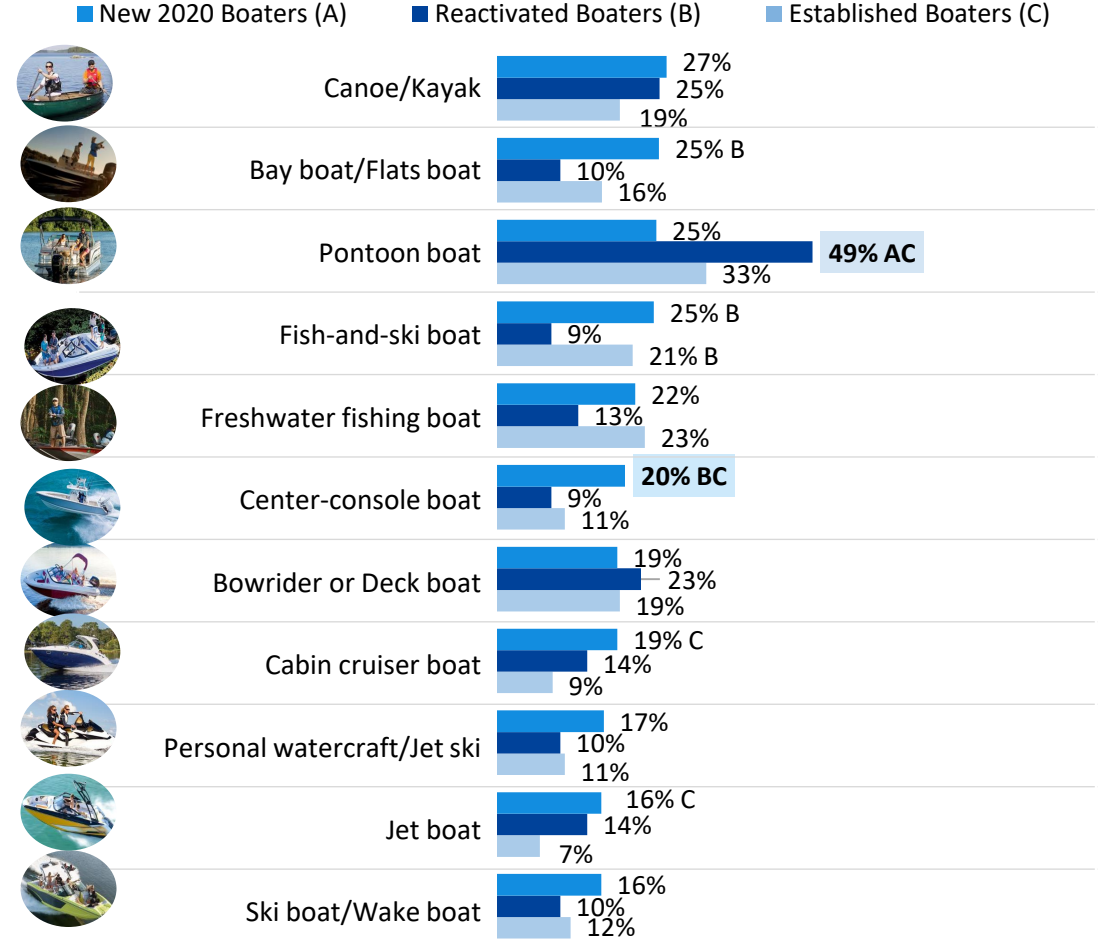


Lakes were the most common body of water for boating though New Boaters also visited rivers, ponds and streams. Most traveled less than an hour and New Boaters were more engaged, going at least 1x per month. A variety of boats are used for boating, though a pontoon was significantly more common among Reactivated Boaters, in line with the desire to relax and just boat around.

BODY OF WATER



TYPE OF BOAT USED



DISTANCE & FREQUENCY

| | NEW 2020 BOATERS | REACTIVATED BOATERS | ESTABLISHED BOATERS |
|-----------------------------|-----------------------|---------------------|----------------------|
| | (A) | (B) | (C) |
| DISTANCE | | | |
| Less than 1 hour | 62% | 51% | 52% |
| 1-3 hours | 33% | 38% | 34% |
| 3+ hours | 6% | 11% | 14% A |
| # Of Times Per Month | 4^{BC} | 2 | 3^B |

Base: New 2020 Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104)

D5. What types of boat(s) do you use when you go boating? (Ranked to New Boaters) D6. And in what type of water do you typically go boating in? (Ranked to New Boaters) D14. How often did you go boating in the past 6 months? D15. And, how far did you travel to go boating?







Capital letter indicates statistically greater than noted group at 95%






Although challenging moments can test the fortitude of any fisher or boater, most find the pay off to be worth it—a true moment of disconnection from daily life with those they love most.


Challenging Moments


| | | |
|--|---|--|
|  Uncomfortable <ul style="list-style-type: none"> • Cold weather • Rain prevented, delayed outing • Choppy water • Dealt with insects |  Unsuccessful <ul style="list-style-type: none"> • Did not catch anything, or someone else caught all the fish |  Gear Issues <ul style="list-style-type: none"> • Boat sank/broke while on the water • Gear broke • Forgot gear • Tangled lines |
|  User Error <ul style="list-style-type: none"> • Fell out of boat • Hook caught in hand • Boat flipped, bumped into rocks, banks • Got lost |  Children Concerns <ul style="list-style-type: none"> • Sick • Bored • Difficult to get children ready, make sure they have all necessary items |  <p><i>We went to leave the dock but the [rented] boat ended up not working properly. We ended up having to wait for them to deliver a new boat. Then, later on we were out on the lake and the new boat ended up dying out on us. We had to wait for them to come and meet us out on the lake to deliver a new battery."</i></p> |




Motivation to See Through Challenging Moments

- 

Every mistake makes you wiser and every tough day makes you stronger. Some days it may rain other times it might be too cold, but it is a very fun hobby and I love catching fish and I have learned to love the ocean and appreciate its beauty. I love bonding with family over fishing, it's what makes so much of this worthwhile."
- 

What motivates me is the challenge of fishing, having the patience, being able to relax, knowing the moment to act, and the reward of doing it well is what motivates me and knowing that I'm good at something."
- 

The shortness of life and the small time we have with family is what motivates us."
- 

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."





The biggest obstacle was just being sure we had everything we needed to have a successful outing. With two small kids if the first experience isn't a positive one then they are less likely to want to do it again.



Challenging moments for children often encompass situations that cause disappointment or swell feelings of fear.

The unfocused nature of some children makes it difficult to ready them for or keep them engaged throughout fishing and boating trips.

Challenging Moments for Children

Difficulty with Focus or Following Direction

"The most challenging experience I have had was boating. Trying to get my kids to get their life jackets on. They didn't want to wear them."

Difficulty Getting Children Ready for Outing

"No matter how many times I ask everyone to get their stuff together the night before. It never happens...It's a lot of effort for my wife and daughter to ever be ready for anything."

Disappointment from Lack of Catching Fish

"The toughest days are when you bring the kids out on the heels of a great day where the line was constantly active to a day where nothing is biting."

Equipment Issues

"One day we decided to hike a mile out to a spot my kiddos requested, and they brought along full tackle boxes, mind you they are young kids lugging big boxes. We got to our spot and just could not get either pole to cast out."

Fear During Boating Issues

"Our boat broke down, collided with a rock without realizing it and we had to return to the port, it was a very risky and exciting experience, I was just with my son and he got scared a lot."

Fear of Water

"When we took our daughters on the boat for the first time. They were so scared, and we had to comfort them and work with them to get over their fears."

Losing Equipment

"The most challenging day so far was when my son lost his first fishing rod... Suffice it to say my son was not happy and he pouted for the rest of the day."

Sick

"One of my children was sick, he began to feel sick to his stomach and had a fever so we couldn't stay and that affected everyone."



ASFs tend to invest a bit more in their overall experiences, often because they are bringing along the family or are comfortable splurging on a fun weekend trip or day out. Both are overwhelmingly satisfied with their experiences, agreeing fishing and boating feel like worthwhile ways to spend free time and money this year.

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 (not pre-bought with gear)



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

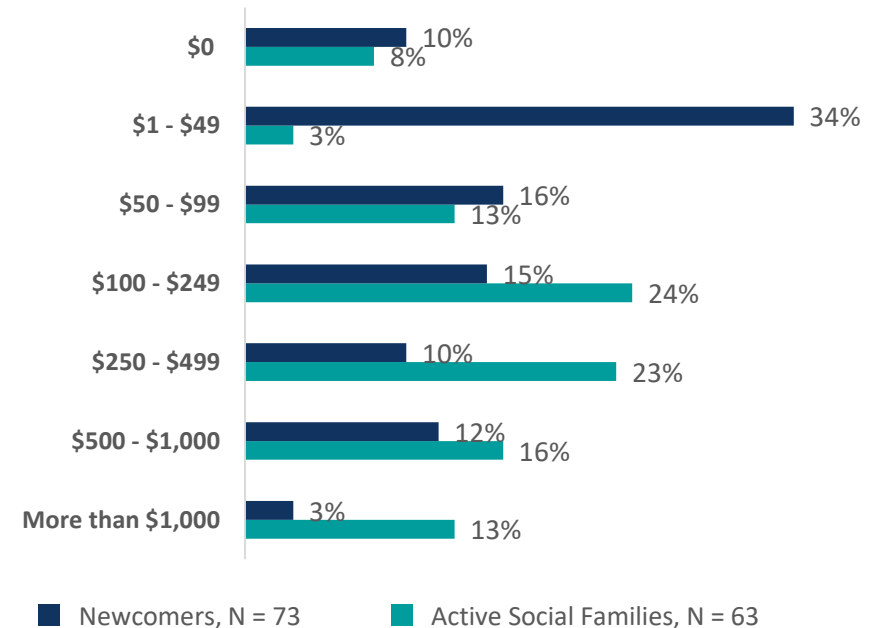


The average fishing and boating experience for me this year ended up being rather cheap. Since I borrowed the rod and reel, I ended up chipping in for gas for the boat, bait for everyone, and drinks for everyone as well. The lodging was free since we stayed at a family cabin. The morning started with breakfast and coffee, a quick fill up at a local station on the water for gas and snacks, then off we went. The bait lasted long enough that we didn't need to resupply." - Newcomer

"We will usually fuel up at the gas station by our house...On the way we stop at Walmart and grab a case of water and some bags of chips and other group snacks. We also take that time to get bread and lunch meat and cheese if we didn't have any to bring from home. Then we head on out for a day of fishing. Afterwards we usually go sit down and have a nice seafood meal or go through a drive through if it is getting a little late."-ASF

Amount Spent on Average Fishing/Boating Experience this Year

Does not include cost of gear purchased



Discussion Board 3, Q8 Please describe the average fishing and/or boating experience you had this year and how you spent money (exclude gear you may have purchased, but consider fuel, lodging, food, clothing, and any other expenses).
 Discussion Board 3, Q9. Again, think about the average fishing and/or boating experience you had this year. Excluding the cost of any gear you may have purchased; how much do you think you spent on the AVERAGE fishing and/or boating experience?
 Discussion Board 3, Q10 Do you feel that your total investment in both the gear and the experience was worth it? If you could go back in time would you do it again? What, if anything, would you change for your next fishing and/or boating outing?





Many prized possessions related to fishing and boating are cherished not for their monetary value, but for their sentimental value—who they came from, where it has been, how long it has been a trusty instrument. NCs are less likely than ASFs to own prized possessions as they have not participated long enough, or seriously enough for them to accumulate.

Other possessions are valued for their functional benefits or the pride owners feel in acquiring them.



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



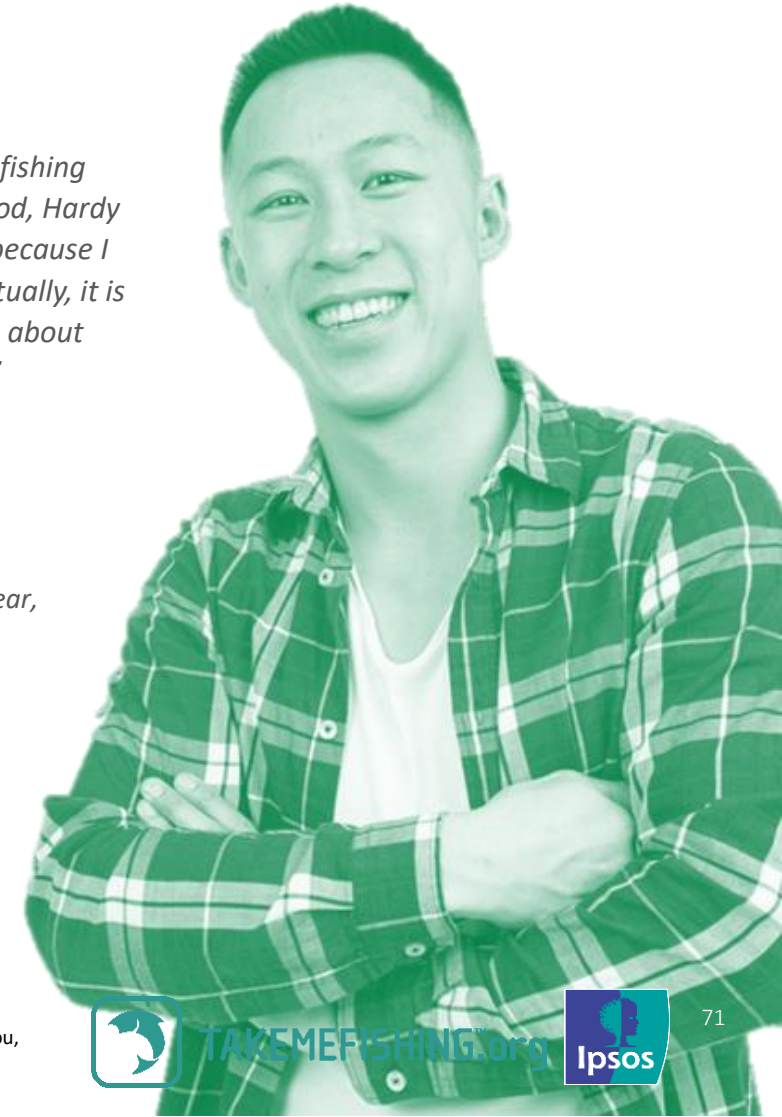
Why Prized

- Emotional Benefits
 - 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
- Functional benefits
 - Works well, reliable, etc.

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."

I'm too new in the game to have [prized possessions]."



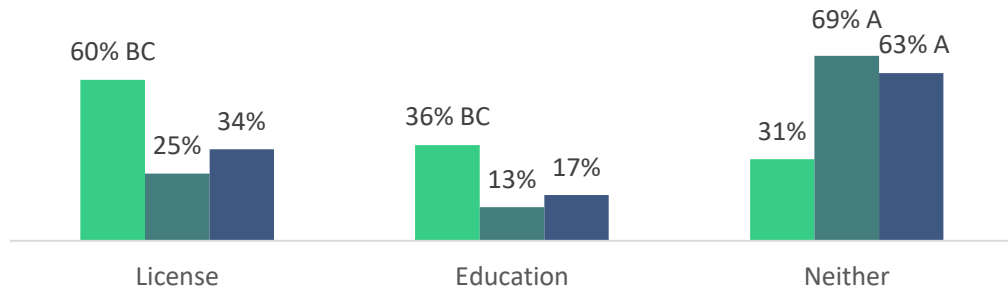
INFORMATION RECEIVED



Majority of New Anglers were contacted by a state fishing and wildlife agency about licenses and a third, about education. Far fewer Reactivated and Established Anglers were contacted at all. Agencies mostly reached out via email, followed by social.

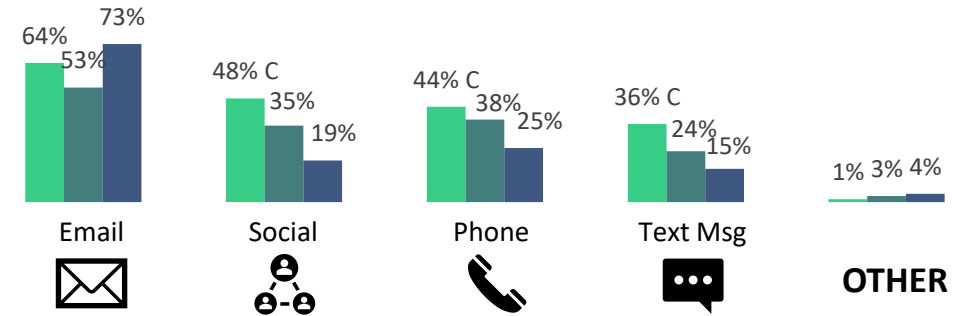
STATE FISH & WILDLIFE AGENCY REACHED OUT

■ New Anglers (A) ■ Reactivated Anglers (B) ■ Established Anglers (C)



HOW STATE FISH & WILDLIFE AGENCY REACHED OUT

■ New Anglers (A) (N=238) ■ Reactivated Anglers (B) (N=34*) ■ Established Anglers (C) (N=52*)



WHAT INFORMATION WAS SHARED BY STATE FISH & WILDLIFE AGENCY



How to get a **license** and **requirements**.
 Updated **policies**.
 The benefits of **buying a license**.
 Information about **laws** and details associated with the fishing process.
 Specific information about the **boats**.



What **type of fish** to expect and **weather** conditions.
 Social distancing.
 My **personal data**, inquiries about the fishing area, the number of people, and the duration of the trip.
 The rules and how to get my **license**.



Information on how to take care of the **environment** and keep beaches and rivers clean for wildlife
Safety procedures, the rules and laws of fishing in my area.



Prices, the rules, and details of what I was buying.



* Caution, low base size <60

Base: New 2020 Anglers (n=343); Reactivated Anglers (n=111); Established Anglers (n=140)

State Wildlife Agency Has Reached Out: New 2020 Anglers (n=238); Reactivated Anglers (n=34*); Established Anglers (n=52*);

C6. Has the State Fish & Wildlife Agency reached out to you regarding purchasing a fishing license and/or providing information/education about fishing in your state? (Ranked to New Anglers) C7. How did the State Fish & Wildlife Agency reach out to you? (Ranked to New Anglers) C8. What information was shared with you?

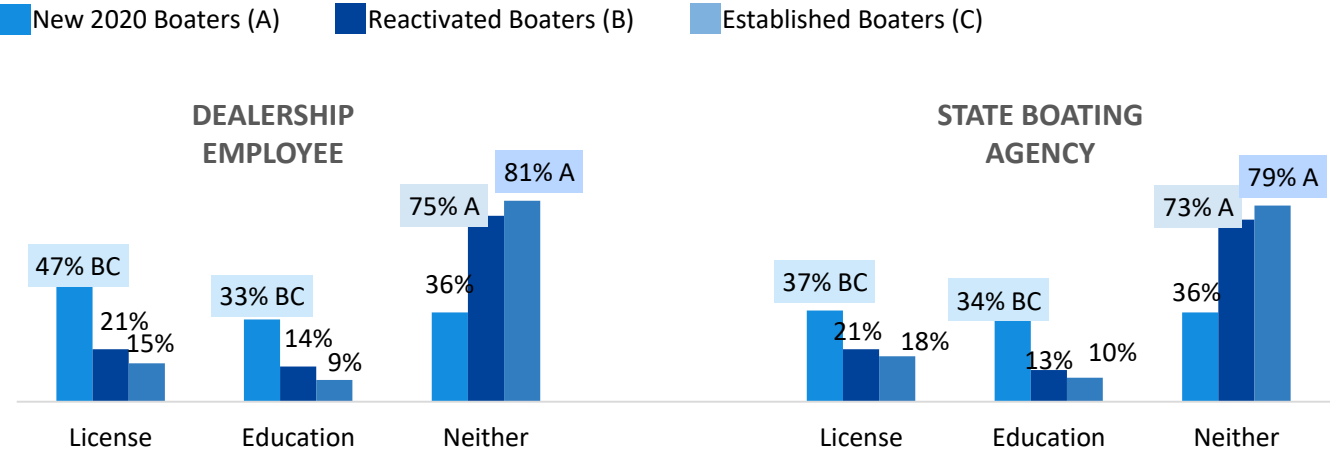
Capital letter indicates statistically greater than noted group at 95%



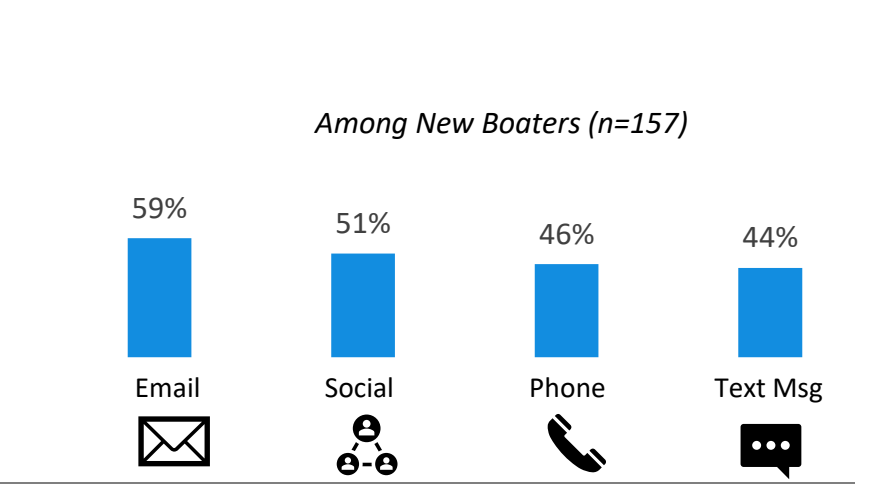


The majority of New Boaters were also contacted. Dealerships reached out about licensing while state agencies reached out about both licensing and education. Typically, the information shared covered important documents and policies, basics of boating and safety procedures. Email and social media were the top modes of contact.

WHO REACHED OUT



HOW STATE BOATING AGENCY REACHED OUT



INFORMATION SHARED WITH NEW BOATERS

| | | | |
|---|--|--|--|
| <p>Discounts on boat fees.</p> <p>Fishing equipment.</p> <p>About boat licenses.</p> | <p>An important statement about the importance of having all documents online.</p> <p>How to find a lost title and claim ownership of our new boat.</p> <p>I have shared pertinent and necessary information for this type of sports practice.</p> | <p>The basics of boating, surveys and promotions.</p> <p>I have not had any information at the moment.</p> <p>We have exchanged opinions about boats.</p> | <p>Details and description about procedures I have to follow.</p> <p>The contact information and safety guidelines.</p> <p>Important information about fishing.</p> |
|---|--|--|--|

*Caution, low base size; Reactivated Boaters and Established Boaters, not shown; base <20
 Base: New 2020 Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104);
 D10. Has anyone, such as an employee from a dealership or State Boating Agency, reached out regarding ...? D11. How did the State Boating Agency reach out to you? D12. What information was shared with you?
 Capital letter indicates statistically greater than noted group at 95%

RETAINING NEWCOMERS



The majority of Newcomers and nearly all ASFs feel they will continue to participate in fishing and boating at their current level in the future. For many ASFs it is a meaningful part of their lives and a passion.



Reasons for Continued or Increased Participation in the Future

NEWCOMERS AND ACTIVE SOCIAL FAMILIES

- Life stage changes
 - As age increases (retirement, easy on the body, more financial resources)
 - Children growing to age where they enjoy it, want to pass on to them
 - Children becoming more independent (allowing parents more free time)
- Less risk related to COVID-19 (once pandemic ends)
 - Travel more to fish/boat
- Others around them interested
- Easy way to relax be in nature



Fishing is something that I really enjoy to do with my family, and I do believe once I retire and my kids are grown, that's probably all I would do with my husband."

NEWCOMERS

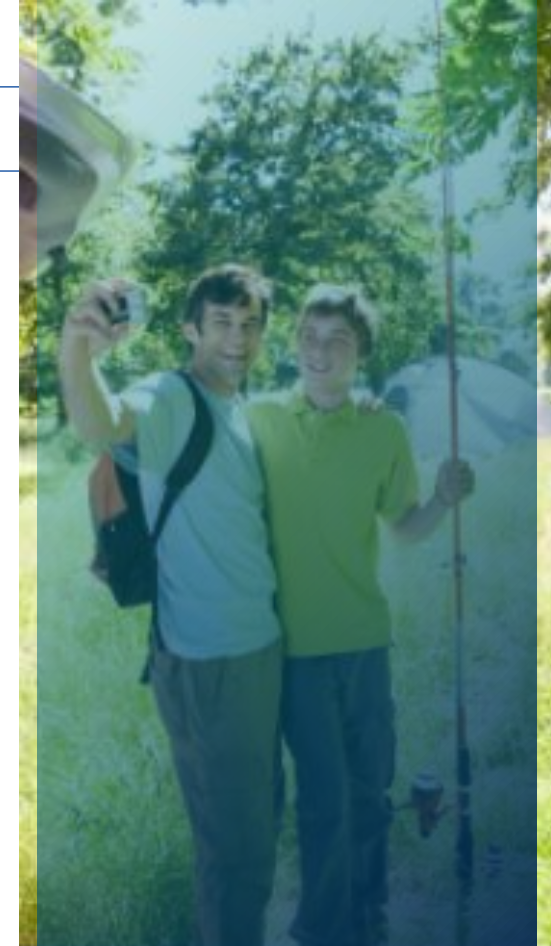
- Friend owns boat
 - Will participate more once pandemic ends
- Will own necessary and/or better gear
- Likely to move to area more conducive to sport
- In phase of interest growing, so want to participate increasingly more
- Others around them are interested

ACTIVE SOCIAL FAMILIES

- Have participated entire life
- Important part of their life



It's like a passion to me right now and I don't see it going away."





A minority of Newcomers believe they will fish and boat less in the future, as the end of the pandemic will mean new demands of their time and their children’s time, in addition to the ability to engage in a broader range of entertainment activities (concerts, travel, etc.). Still, most see these as new activities they have come to appreciate and will continue participate in going forward (although less).

Among those not certain they will participate as much in the future, the continued interest of those around them (family, friends) is the most potent motivation to continue at their current rate of involvement.

Some portion of NCs feel they will participate less in the future than during the pandemic, but their participation will still be greater than before it.

NEWCOMERS

Reasons for Potential Diminished Future Participation

- Work demands once COVID-19 over (commute, increased hours)
- Will resume other entertainment and social activities
- Only modest amount of interest
- Expense related to boating
- Reliant on other who own gear, boat
- Children’s school/sports will resume

I think once life returns to "normal" there will be more things that will be demanding our time, attention, and resources. I think our kids sports and activities will have more robust schedules and our calendar will be fuller. I think there will also be many more family get-togethers and events that we will need to be a part of. However, with that said, I think we will have a higher priority on trying to get family & friends out to the lake. This year has really reminded us of how much we enjoy it and how memorable time on the water can be."

NEWCOMERS

Motivation to Continue Rate of Participation

- Better success at catching fish
- Interest of others around them
 - Family, children continuing to express interest
 - Others in social circle continue to have interest
- Discounted rental rates
- Own gear, boat (not reliant on others)

It all depends on friends want to do. I am certainly game to continue fishing but only if my friends still want to do it."

I imagine I might do a little less fishing and boating than this summer, simply because there will be more activities demanding my time, but I think overall it will still be more than pre-Covid, when I rarely did it at all."



Discussion Board 1, Q7. Once life returns to “normal”, do you foresee any change in the time you are able to devote to fishing or boating? Why or why not? If it came down to a choice in how to spend your free time once all options are available again, would you choose fishing or boating over something else that occupied your time in the past? What would motivate you to keep fishing and/or boating at your current level?

Discussion Board 2, Q7. In the future, what is your overall likelihood to keep up with fishing and boating as much as you are now?





The majority of New and Reactivated Anglers indicate they enjoy fishing and expect to continue fishing in the future, driven by feeling relaxed and peaceful and considering it to be a great activity for everyone.

| | NEW 2020 ANGLERS (A) | REACTIVATED ANGLERS (B) | ESTABLISHED ANGLERS (C) | LAPSED ANGLERS (D) |
|---|----------------------|-------------------------|-------------------------|--------------------|
| % Enjoy Fishing Extremely/ Very Much | 85% BD | 74% D | 91% BD | 40% |
| % Extremely/ Very Likely to Continue Fishing | 90% D | 86% D | 96% ABD | 47% |

Reasons for High Likelihood to Continue

- "It's **relaxing** and fun."
- "It's something my whole family **enjoys doing**."
- "Because it is a **unique** and fabulous experience that I **really enjoy** doing it."
- "**Great way to spend time** with family and friends and to unwind and relax."
- "We had fun and it **didn't cost a lot** of money because we already had everything to go except my license."
- "**We've discovered the entire family enjoys this past time and it's not expensive once you get set up**."

- "My family and I **enjoyed** it so much."
- "They **caught fish and can't wait to go again**."
- "Fishing is a **huge part of my life**."
- "Fishing is something that I like to **experience with others**."
- "I like to fish, it's **peaceful** so I can see myself fishing in the future."
- "Live very close to a fishing spot and **all members of my family enjoy it**."
- "**Love** the water and fish."
- "My husband is an avid fisherman. He competes in fishing tournaments."

- "I **enjoy fishing** very much and it is a **good way to relax** with my family and friends."
- "It is something we **enjoy** and have been **doing for years**."
- "Fishing let's you **enjoy nature** while you **relax** and observe life around you. Not to mention you are catching supper!"
- "I always was **fond of going fishing** ever since I was young."
- "**It is a habit and easy to social distance. It is also relaxing**."
- "I live within walking distance of a pond so I can **fish when I want**."
- "It's my **passion**."

- "Because I haven't been out due to the Coronavirus and a **fishing trip is relaxing**. I could use some relaxation."
- "It's something I like to do. I have the equipment and places to go nearby."
- "It's fishing season!"
- "I always **feel at peace** by the water."
- "I anticipate having lots of **free time** later in life, and the ability to enjoy that time in the manner I choose."
- "My son **loves to fish** so its a great way for us to bond."
- "It is a very profitable recreational practice."

Base: Participated in Fishing/Boating: New Anglers (n=343); Reactivated Anglers (n=111); Established Anglers (n=140); Lapsed Anglers (n=381)
 E1. How much do you enjoy the following activities? E2. And, how likely would you be to do each of the following in the future? E3. Why do you say you would be [INSERT RESPONSE FROM E2 IN LOWERCASE LETTERS] to go **fishing** in the future?
 Capital letter indicates statistically greater than noted group at 95%



Most boaters expect to continue boating in the future. It is a nice way to relax and spend the day and for those who own or purchased a boat, it is a good use of their spend. Boating is also mentioned as a good way to social distance, something that can be marketed to consumers throughout the future.

| | NEW 2020 BOATERS (A) | REACTIVATED BOATERS (B) | ESTABLISHED BOATERS (C) | LAPSED BOATERS (D) |
|--|----------------------|-------------------------|-------------------------|--------------------|
| % Enjoy Boating Extremely/ Very Much | 87% D | 89% D | 94% AD | 71% |
| % Extremely/ Very Likely to Continue Boating | 87% D | 93% D | 97% AD | 70% |

Reasons for High Likelihood to Continue

- | | | | |
|---|--|--|--|
| <ul style="list-style-type: none"> • “I enjoy the activity and have plans to go this weekend.” • “I like to go boating with my family.” • “My friend owns a boat.” • “I like to do it whenever I have the time and the financial means.” • “An enjoyable experience that could be done alone or with others.” • “We have a boat now and we live on a lake.” • “Yes, it’s becoming a family tradition, so we are going to try to do this every year.” • “It’s my favorite hobby.” | <ul style="list-style-type: none"> • “Boating is fun. We had a great time boating on our vacation. I love the scenery and swimming and snorkeling.” • “We all enjoyed it- kids and adults and as long as a friend or family member invites us, we will definitely go again.” • “Boating is fun and relaxing.” • “I can’t get enough of the water, so I know I’ll definitely be going as soon as the opportunity comes up.” • “Our family and my husband’s family enjoy boating together. My husband and I have discussed the possibility of getting a boat in the future.” | <ul style="list-style-type: none"> • “I prefer to go out boating with my family since more of us go and we usually have a few boats go out. We tube and sometimes jet ski too.” • “With social distancing its the only thing we can afford now.” • “We all love the boat and getting out in the water and fishing.” • “I love boating and we try and go at least once a year.” • “It takes a boat to do fishery sampling.” • “Boating is something I do when I go fishing, but it is a fun experience itself.” • “It’s a good friend activity, fun to listen to music, drink and swim.” | <ul style="list-style-type: none"> • “Boating is awesome and feels cheaper somehow than fishing. Like to rent a boat.” • “I really enjoy it and would seek out opportunities to do it on vacation or would gladly accept an invitation with friends.” • “I would love to go boating as much as I can. Being on the water is very relaxing.” • “Love the fun and adventure.” • “Yes! I love boating, and its a great way to spend some time outdoors! It can also be done safely, even during a time of corona.” • “It’s fun and exciting and allows me to be on the water.” |
|---|--|--|--|

Base: Participated in Fishing/Boating: New Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104); Lapsed Boaters (n=377)
 E1. How much do you enjoy the following activities? E2. And, how likely would you be to do each of the following in the future? E4. Why do you say you would be [INSERT RESPONSE FROM E2 IN LOWERCASE LETTERS] to go **boating** in the future?
 Capital letter indicates statistically greater than noted group at 95%



Most ASFs rate their skill level with fishing and boating higher than Newcomers. More than half of Newcomers see themselves as a beginner and realize they still have much to learn before reaching competency.

Beginner

Learning and often a newer interest; realize much is still 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! I have improved quite a bit in kayaking however!"

Intermediate

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

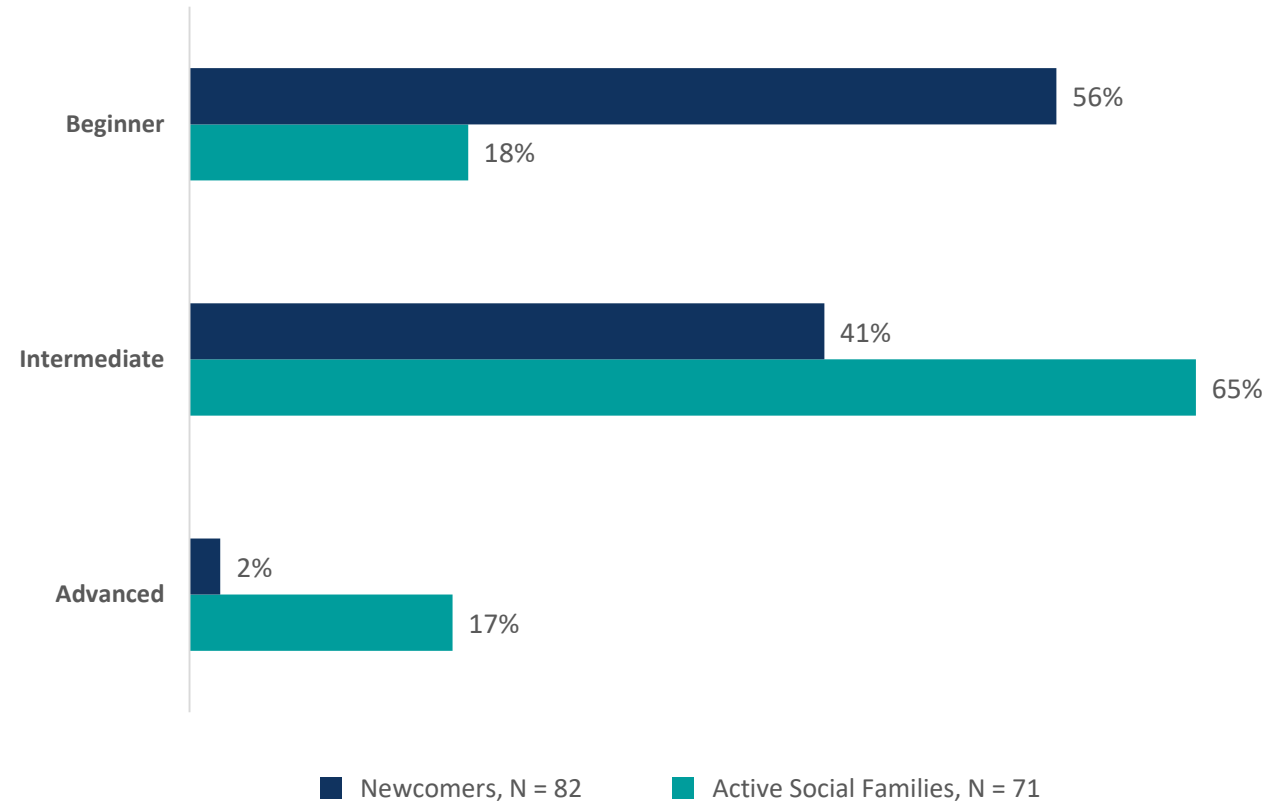
I would definitely consider myself to be intermediate because I know what to do to catch fish and do pretty well all by myself, just for leisure.

Advanced

Have participated for a long period of time; know the right gear for a variety of situations; keeping up to date and constant improvement important to some

I have been boating and fishing since I was a little kid. As an adult I have fished and boated all over the world."

Current Fishing/Boating Skill Level





Newcomers want to master the basics as this provides them the flexibility to participate in these sports even when they are not with others who are more knowledgeable. In addition to a logical advancement in their skills, it also provides the emotional benefits of feeling accomplished and satisfied.

Although ASFs range in their skill levels, they are more likely to desire advanced skills or goals, or already feel comfortable at their current level of skill.



Master the Basics

Build confidence in skills

- Boating
 - Steer, maneuver, or sailboat
 - Understand operation and maintenance (and operation of larger boats)
 - Obtain license
 - Safety guidelines (learn more and practice them)
 - Maneuver trailer, launch boat
- Fishing
 - Clean, cook fish
 - Catch more fish
 - Learn to catch specific fish (gear/bait needed)
 - Obtain license
 - Better at casting
 - Set up line, bait
 - Pick fishing locations



Advanced Aims

Mastery and sharing knowledge

- Keep relevant on skills, new gear, and news
- Account for all variables while fishing (salt vs. fresh water, weather, reading the water, etc.)
- Continue to learn from experts, pick up specialized techniques (walk the dog, etc.)
- Create own video series
- Create youth fishing league
- Compete internationally

ASFs skew more toward Advanced Aims

NCs skew more toward Mastering the Basics

Overlap in level of goals exists among both groups



Other Goals

Trying new things with more people

- Participate more often
- Get family more involved (often children)
 - Keep tradition going (mostly ASFs)
- Try new things
 - Deep sea, fly, ice fish
 - Catch larger fish
 - Explore new areas

To be more knowledgeable on what different kinds of bait are best for different kinds of fish."

I'd like to diversity my fishing skills to cater to all water bodies - taking into consideration all the factors like currents, types of fish, weather, baits etc."



Both groups see various knowledge resources as key support in reaching their fishing and boating goals, but Newcomers point to the motivation of participating with others who are interested in these sports as a critical element.

Motivation (others to participate with)

- Making new friends who are involved
- Continued invitations to participate (for respondents who are less interested or skilled)
- Others accepting invitations to participate (for respondents who are more interested)

NCs skew more toward motivation through participating with others

ASFs skew more toward knowledge resources

Overlap in resource preference exists among both groups

Knowledge Resources

- Experts
 - Friends, family
 - Boating club
 - Other local knowledgeable people
- Organized events
 - Lessons
 - Local fishing/boating events (networking)
- TV shows
- Print material (books, magazines)
- More hands-on experience
- Online information
 - YouTube
 - Blogs
 - Maps of fishing/boating locations
 - Online communities, forums
 - Social media (Facebook groups, Reddit, etc.)
 - Apps
 - Courses
 - Fishing/boating websites

My sister and her fiancé asking me to Lake Whitney again is the main support I would need to keep trying to fish. Their encouragement will be key since I don't have other friends that are into it, and I really don't feel comfortable trying it on my own."

Maybe some professional lessons would help me out. Definitely watching YouTube videos has been a great resource."









I live around allot of experienced fisherman and women. So, I learn allot just by listening while they talk about fishing."





To ensure fishing continues, helping New Anglers reach their goals will be critical. Focusing on highlighting ways to master the basics and encourage trial and experimentation with different areas, types of fish/bait and techniques.

Ensuring information on where to go and where to find **affordable** equipment will help retain them (and other anglers), as expense was a key barrier.








| | NEW 2020 ANGLERS (A) | REACTIVATED ANGLERS (B) | ESTABLISHED ANGLERS (C) | LAPSED ANGLERS (D) |
|-------------------------------------|---|--|--|--|
| ADDITIONAL INFO NEEDED | | | | |
| Different ways to fish | 47% BCD | 20% | 20% | 18% |
| What types of bait I need | 37% D | 35% | 36% | 29% |
| Where to go to fish | 36% | 40% | 40% | 39% |
| What types of equipment I need | 32% C | 25% | 23% | 30% |
| Types of fish available near me | 24% | 27% | 19% | 19% |
| Where to buy/rent fishing equipment | 22% BC | 12% | 7% | 24% BC |
| Fishing regulations | 19% | 30% A | 43% AB | 46% AB |
| Where to go for information | 15% | 8% | 18% B | 23% AB |
| THEY WANT TO BE REACHED VIA: |   Email 37% Social 35% |   Email 42% Social 31% |   Email 42% Social 27% |   Email 44% Social 27% |

Base: Participated in Fishing/Boating: New Anglers (n=343); Reactivated Anglers (n=111); Established Anglers (n=140); Lapsed Anglers (n=381)
 E6. What information must you know before you go fishing again this year? ? (Ranked to New Anglers) E7. What is the ideal way to receive information about fishing?
 Capital letter indicates statistically greater than noted group at 95%



Likewise, to retain New Boaters, help them avoid common mistakes and errors. Make sure classes on boat operation are easy to find and affordable. Provide classes or how-to sessions on various topics like equipment, renting, different types of boats, local areas for boating and regulations.

To encourage Lapsed Boaters back to the sport, providing them with information on where to rent equipment, where to go boating near them and resources for general information and regulations. The best way to reach these consumers is via email.

| | NEW 2020 BOATERS (A) | REACTIVATED BOATERS (B) | ESTABLISHED BOATERS (C) | LAPSED BOATERS (D) |
|-------------------------------------|---|---|--|--|
| ADDITIONAL INFO NEEDED | | | | |
| How to drive a boat | 34% | 23% | 26% | 28% |
| What types of equipment I need | 33% BCD | 17% | 22% | 23% |
| Where to buy/rent boating equipment | 28% C | 30% | 17% | 39% AC |
| The different types of boats | 29% BCD | 17% | 15% | 18% |
| Where to go boating | 29% | 39% | 34% | 38% A |
| Where to go for information | 11% | 11% | 14% | 24% ABC |
| Boating regulations | 16% | 23% | 33% A | 34% AB |
| THEY WANT TO BE REACHED VIA: |   Email 39% Social 29% |  Email 55% |   Email 45% Social 30% |   Email 46% Social 27% |

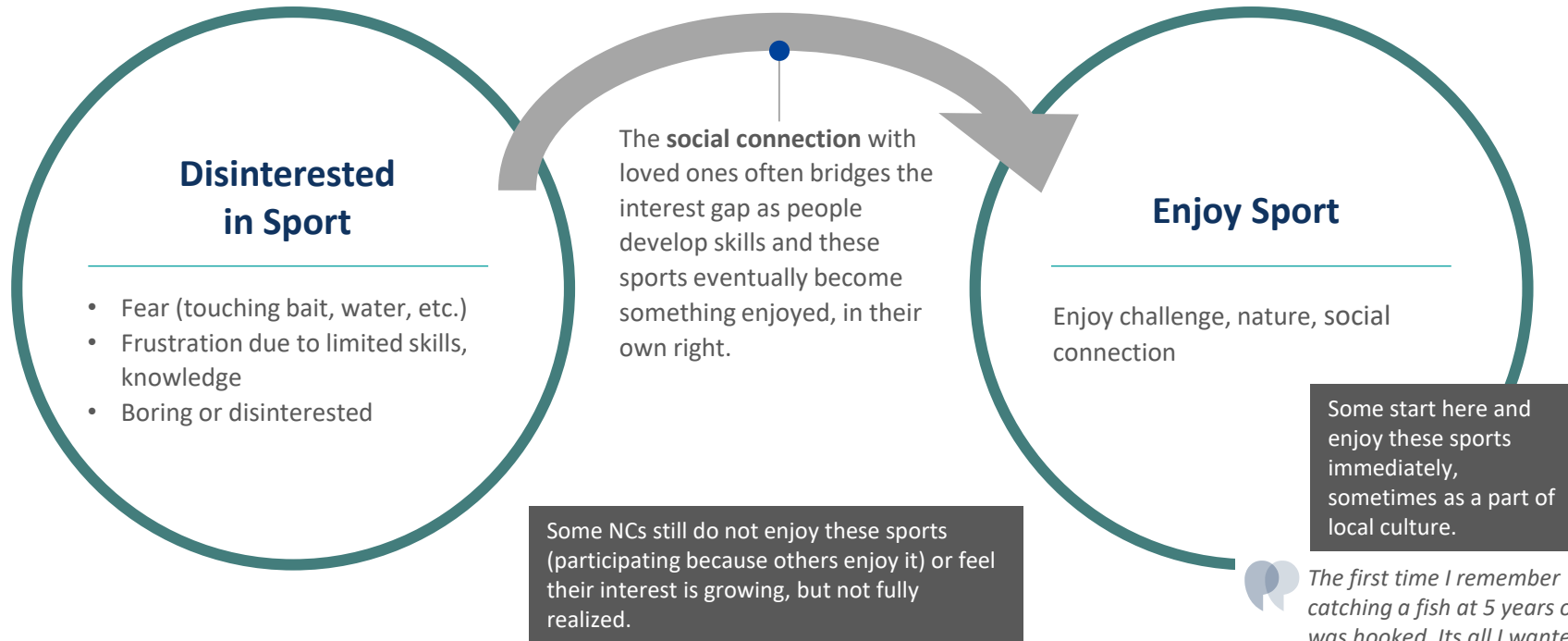
Base: Participated in Fishing/Boating: New Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104); Lapsed Boaters (n=377)
 E6. What information must you know before you go boating again this year? (Ranked to New Boaters) E7. What is the ideal way to receive information about boating?
 Capital letter indicates statistically greater than noted group at 95%



Some fall in love with these sports from the very start, but others develop affection over time. Initially, many experience boredom, fear, or frustration due to a lack of experience. It is critical to eliminate other barriers that might further prohibit Newcomers from getting back out on the water.

Encouraging repetition, perseverance, accumulation of skills and a sense of mastery, appreciation of nature, along with the social element, help many crossover into a deep connection with these sports.

Progression of Interest



I'm not going to lie I have never really been an outdoors person and fishing was a very boring activity to me. However, last summer I became more involved because it became and enjoyable activity, mainly when my daughter, son and in-laws all part took in it. The fact that we can go out there and stay out there for a long period of time fishing is amazing to me. Not only are we enjoying nature, but we are also through fishing strengthening our family by creating memories of our fishing."

The first time I remember catching a fish at 5 years old I was hooked. Its all I wanted to do all year long."

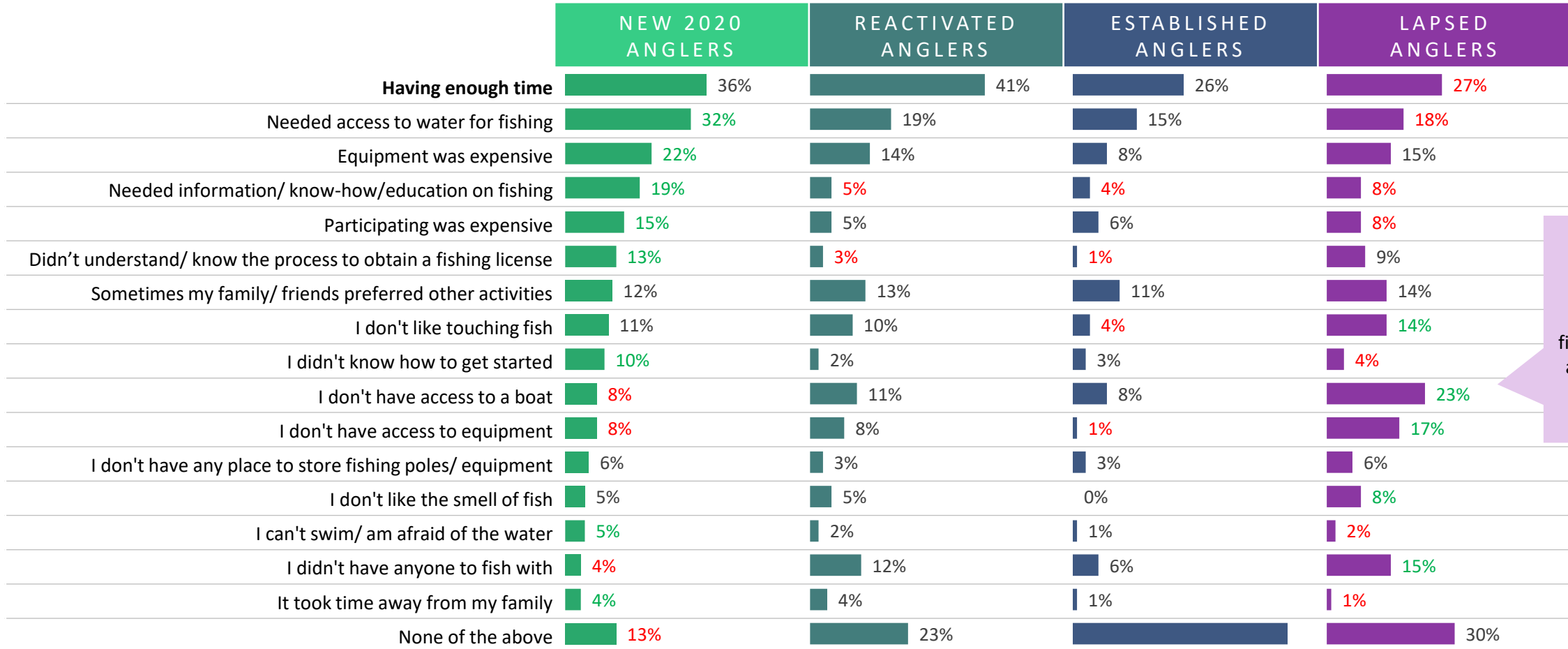
BARRIERS OVERCOME TO FISH



Time was the primary barrier all anglers needed to overcome in order to fish, something that consumers had an abundance of this past summer, likely due to the pandemic. New Anglers specifically, needed to find access to water.

Helping anglers find local spots to fish that don't require a lot of time getting to, can help drive participation.

Educating anglers in the process to obtain proper documentation and recommending ways to affordably buy or rent equipment will also help encourage participation in the future and newcomers to the sport.



Following time, current Lapsed Anglers are not fishing due to limited access to boats and equipment.

Color shading based on adjusted residual analysis. Green = significantly higher/ discriminating for that segment; red = significantly lower/ discriminating for that segment
 Base: Participated in Fishing/Boating: New Anglers (n=343); Reactivated Anglers (n=111); Established Anglers (n=140); Lapsed Anglers (n=381)
 E5. What barriers did you have to overcome to go fishing this year?-(Ranked to New Anglers)

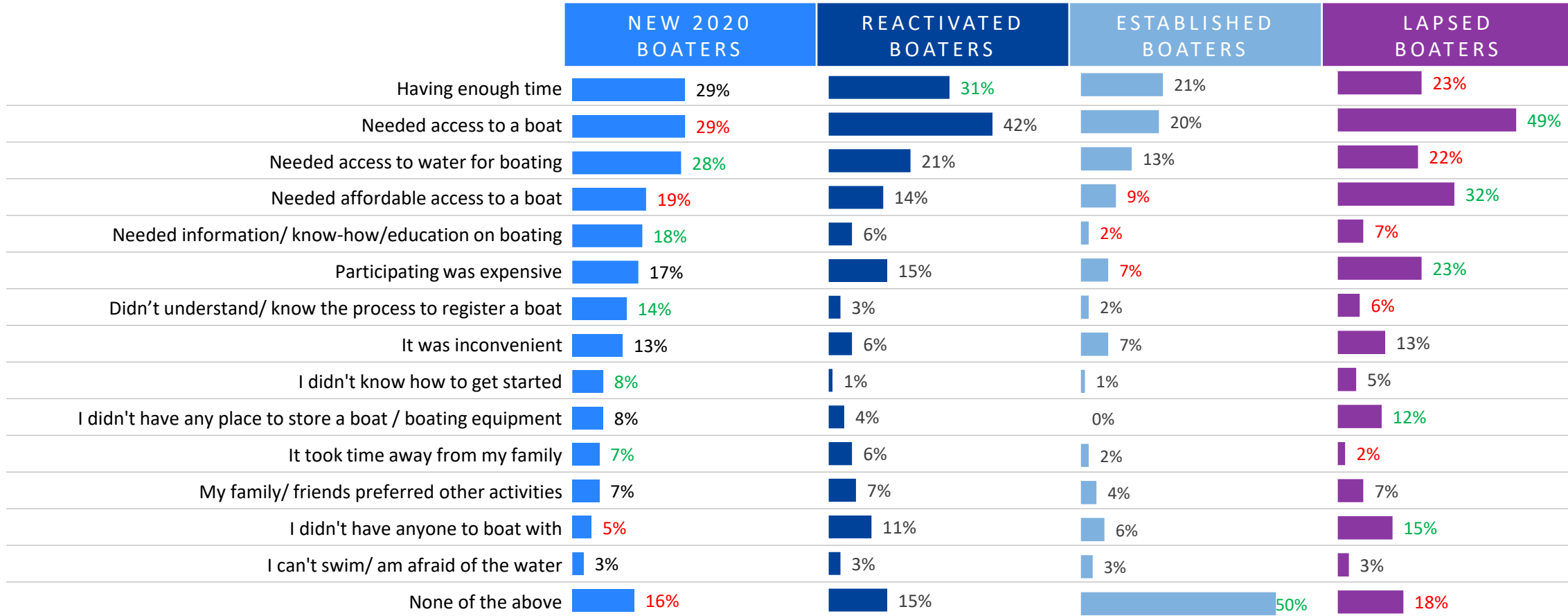
BARRIERS OVERCOME TO BOAT



Time and boat access were the top barriers to overcome in order to go boating.

New Boaters especially, needed to know where to easily find water access and needed education on boating and boat registration.

Lapsed Boaters were prevented by more tangible aspects such as boat access, affordability and equipment. Therefore, demonstrating affordable ways to boat, especially among non-boat owners, will help retail consumers.



Color shading based on adjusted residual analysis. Green = significantly higher/ discriminating for that segment; red = significantly lower/ discriminating for that segment
 Base: Participated in Fishing/Boating: New Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104); Lapsed Boaters (n=377)
 E5. What barriers did you have to overcome to go boating this year? (Ranked to New Boaters)



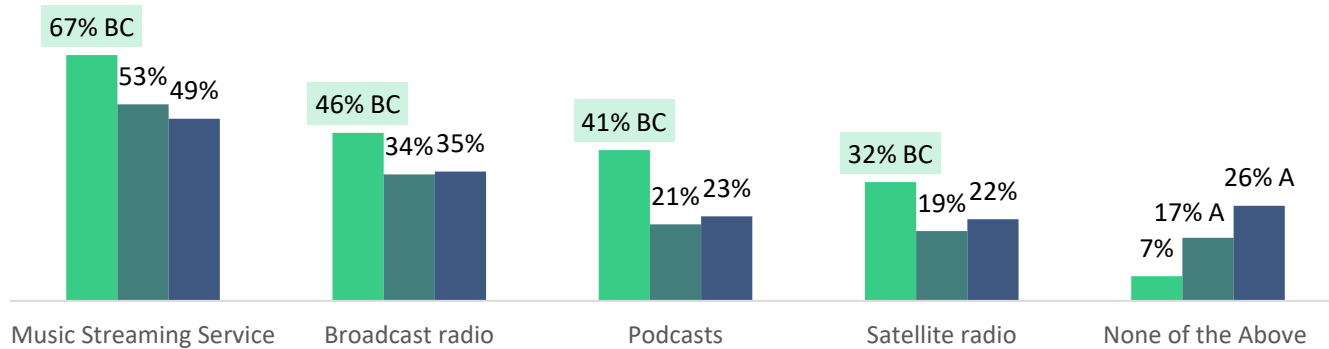
REACHING ACTIVE ANGLERS AND BOATERS



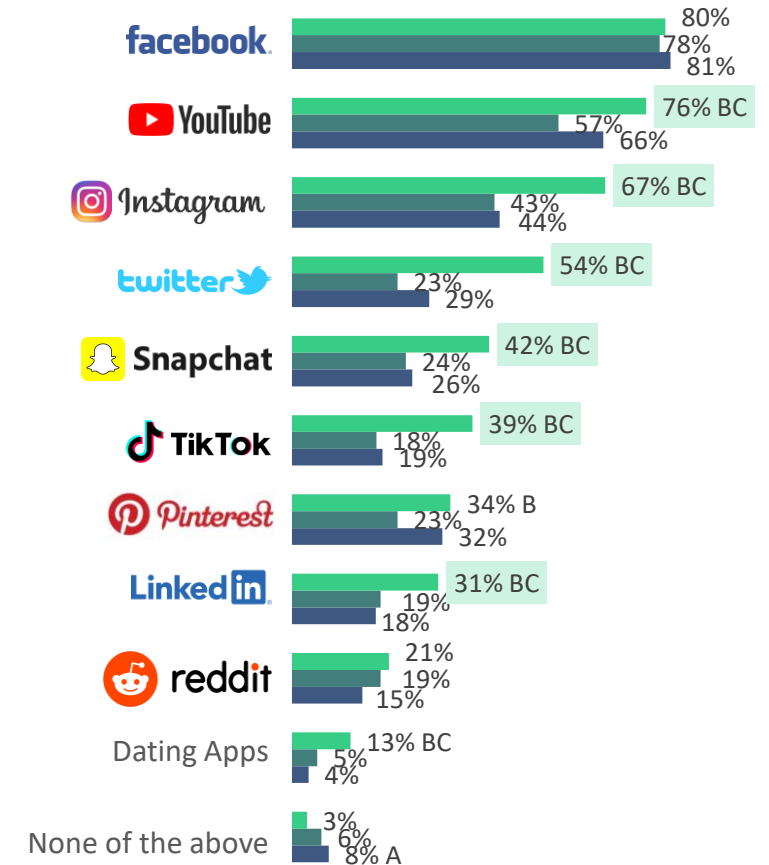
New Anglers are more reachable than Reactivated and Established Anglers through music streaming services, broadcast radio, podcasts and satellite radio. They are also more engaged with YouTube, Instagram, Twitter, Snapchat and other social media platforms. Anglers' favorite brands include Nike, Ford and other car manufacturers, Starbucks and Amazon.

MEDIA LISTENED TO

■ New Anglers (A) ■ Reactivated Anglers (B) ■ Established Anglers (C)



SOCIAL MEDIA



FAVORITE BRANDS



Base: New 2020 Anglers (n=343); Reactivated Anglers (n=111); Established Anglers (n=140)

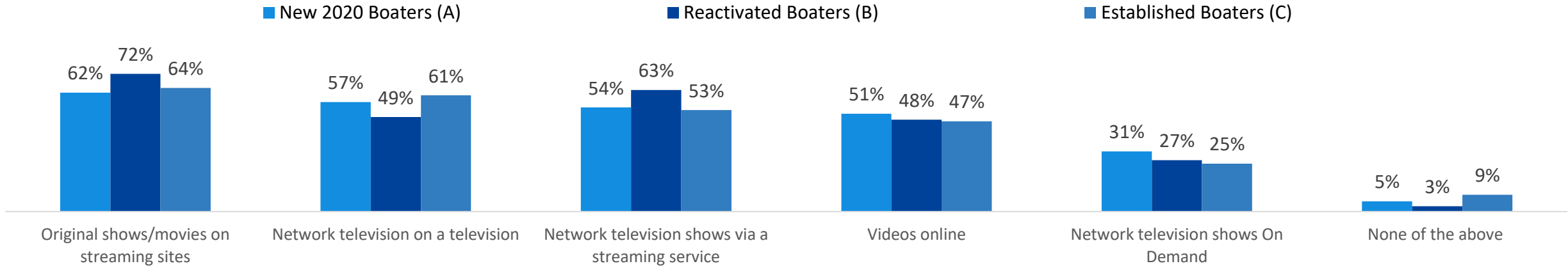
F3. Which of the following do you listen to as sources of entertainment and/or news regularly? (Ranked to New Anglers) F4. Which of the following social media platforms do you use regularly? (Ranked to New Anglers) F5. We would like to know about the brands you love. Who are your favorite designers? What household and food brands do you like? What restaurant chains do you love? What cars/manufacturers are your favorite? Mention as many as you can think of that are your absolute favorites.

Capital letter indicates statistically greater than noted group at 95%





Habits for TV watching are consistent across all boaters and consist of both streaming original content on platforms such as Netflix, Hulu and Amazon as well as watching network television on channels like ABC, Fox, CBS, and Disney.



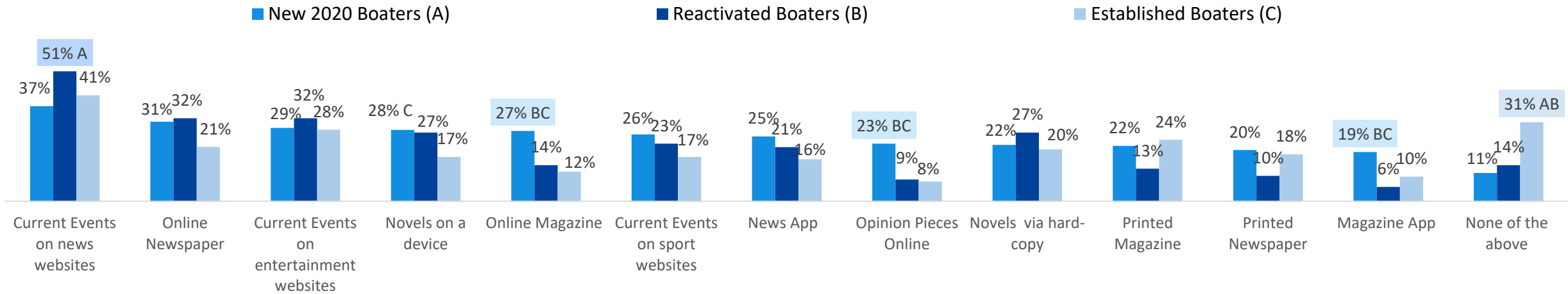
NETWORKS AND STREAMING SERVICES WATCHED REGULARLY



Base: New 2020 Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104)
 F1. Which of the following do you watch as sources of entertainment and/or news regularly? F1b. Which networks or streaming services do you watch regularly?
 Capital letter indicates statistically greater than noted group at 95%



All boaters tend to read about current events and news online. New Boaters are most likely to also read online magazines, online opinion pieces and magazines via an app. New York Times, WSJ, and CNN are top news sources while Facebook, BuzzFeed and People Magazine are other top online mentions.



SOURCES READ FOR NEWS & ENTERTAINMENT

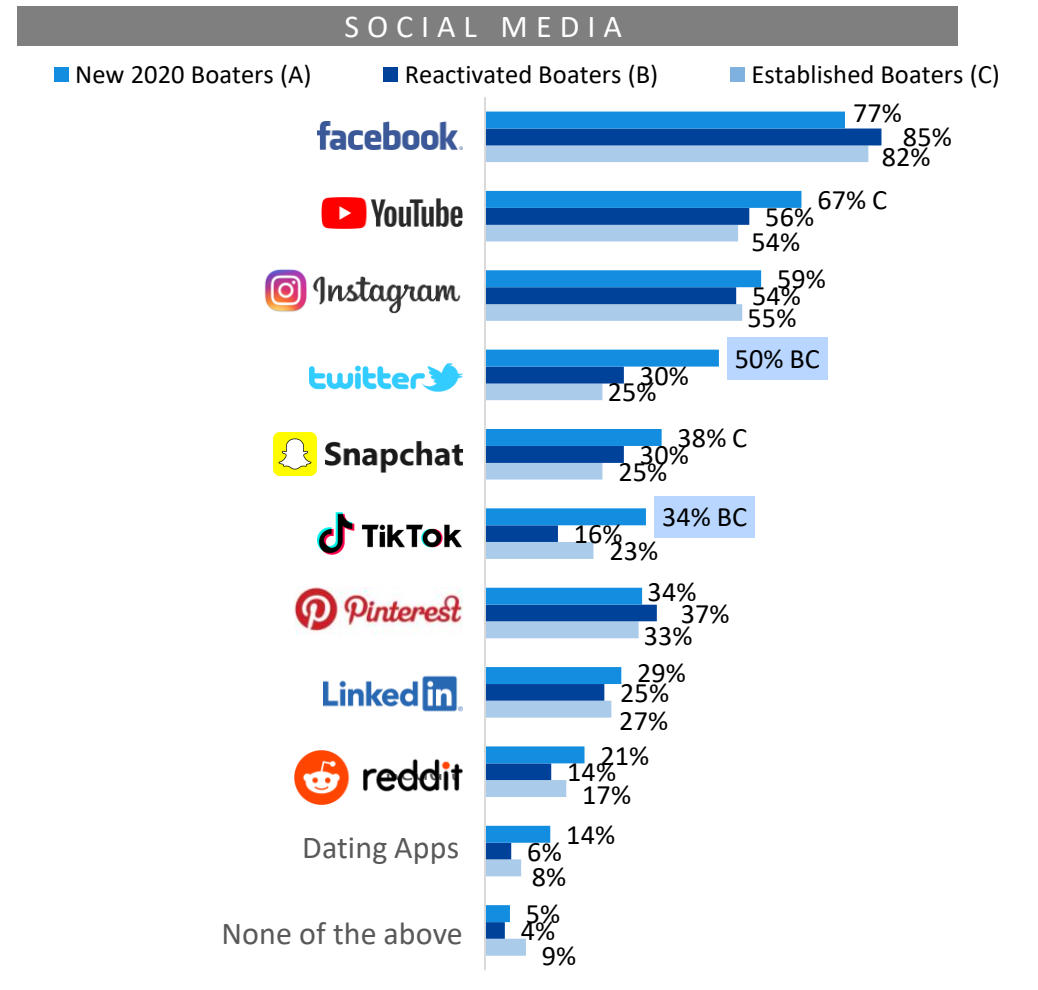
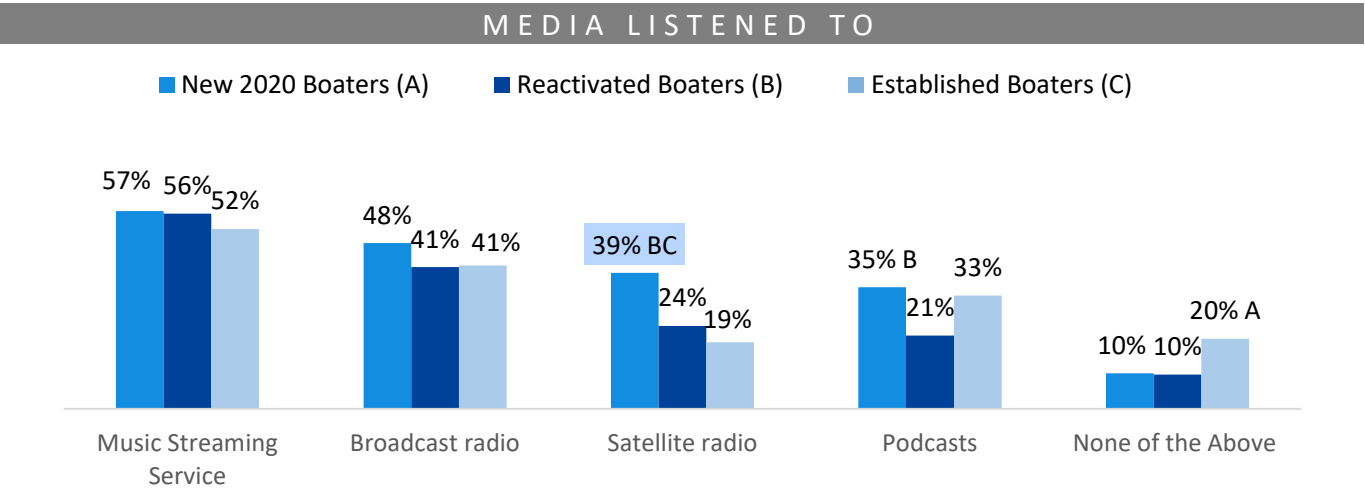


Base: New 2020 Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104)
 F2. Which of the following do you regularly read as sources of entertainment and/or news regularly? F2b. Which of these do you read? Please think about the newspapers, magazines, apps, and websites that you regularly read as a news and entertainment source.
 Capital letter indicates statistically greater than noted group at 95%





Boaters can be reached through music streaming services, and New Boaters are more likely to also listen to satellite radio. Facebook, YouTube and Instagram are top social media channels, while Twitter and TikTok are more popular among New Boaters than Reactivated and Established Boaters. Nike is a leading favorite brand.



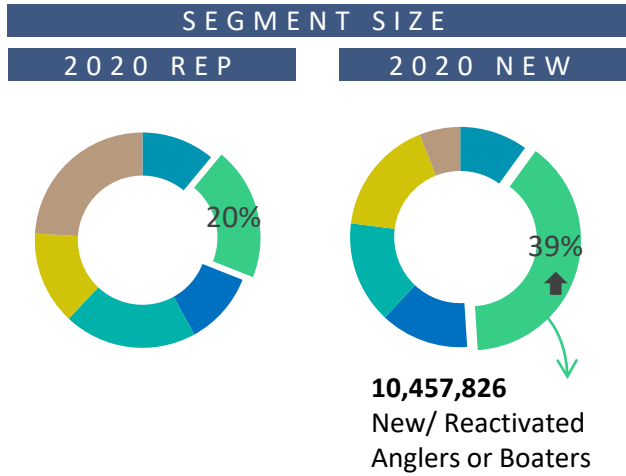
Base: New 2020 Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104)

F3. Which of the following do you listen to as sources of entertainment and/or news regularly? (Ranked to New Boaters) F4. Which of the following social media platforms do you use regularly? (Ranked to New Boaters) F5. We would like to know about the brands you love. Who are your favorite designers? What household and food brands do you like? What restaurant chains do you love? What cars/manufacturers are your favorite? Mention as many as you can think of that are your absolute favorites.

Capital letter indicates statistically greater than noted group at 95%

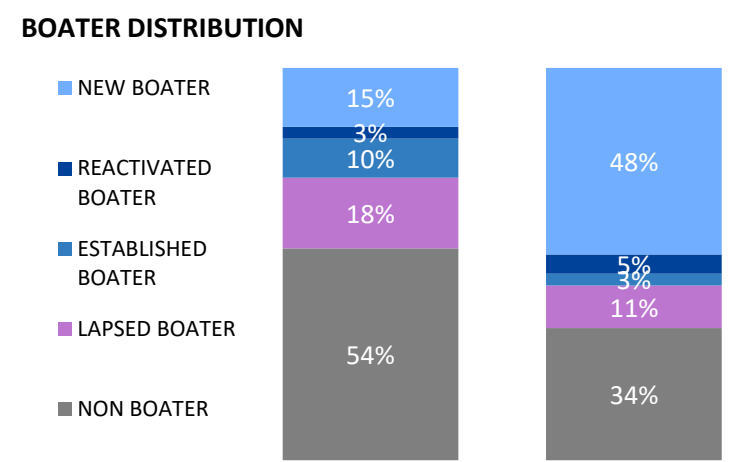
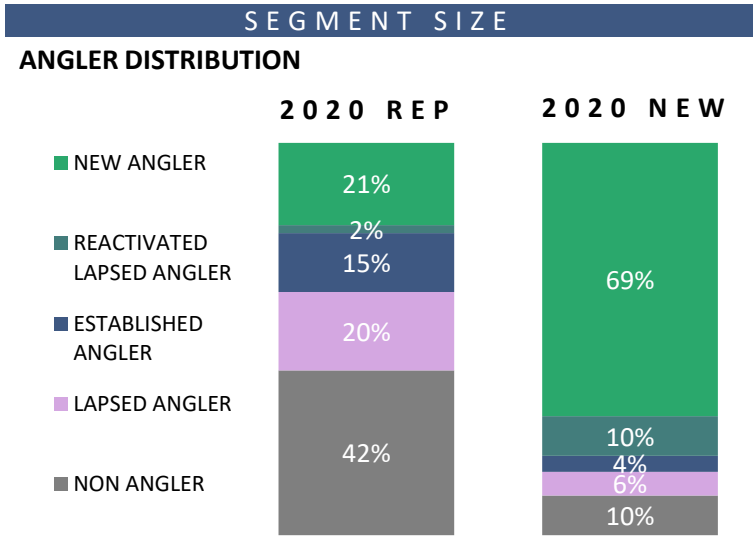


APPENDIX



KEY ATTITUDE AGREEMENT Per Segmentation Algorithm

| | |
|---|---|
| I like many outdoor activities, but would not consider myself an avid outdoorsman | ↑ <i>slightly higher among New ASFs</i> |
| I enjoy participating in outdoor activities with my family | |
| I enjoy the social and adventure aspects of outdoor activities | |
| It's relaxing | |
| It's a good way to create memories | |
| It is a nice way to spend a day | |
| It's rewarding | |
| It's a good way to spend time with friends | |



KEY MEASURES

| FUTURE LIKELIHOOD | | | | ENJOY EXTREMELY | | | |
|-------------------|-----|-----|-----|-----------------|------|-----|-----|
| | | | | | | | |
| REP | NEW | REP | NEW | REP | NEW | REP | NEW |
| 59% | 67% | 58% | 61% | 58% | 68%↑ | 55% | 54% |

ATTITUDES

| | 2020 REP | 2020 NEW |
|---|----------|----------|
| Fishing/boating is relaxing and peaceful | 71% | 75% |
| I enjoy being near water when fishing/ boating | 73% | 71% |
| Fishing/boating helps me get away from my usual routine | 66% | 67% |
| Fishing/boating is a good way to create memories with friends and family | 74% | 67% |
| Fishing/boating is a nice way to spend a day | 66% | 67% |
| Fishing/boating takes me away from electronics | 71% | 65% |
| Fishing/boating is a great way to enjoy the outdoors | 72% | 65% |
| Fishing/boating is a good way to reduce stress | 62% | 65% |
| Fishing/boating is a great way to keep busy when other activities/ sports are not available | 66% | 63% |
| Fishing/boating allows me to catch and prepare food for my family | 60% | 63% |
| Fishing/boating helps me recharge | 64% | 62% |

New ASFs = New or Reactivated Anglers and Boaters who are part of the Active Social Family segment

Very much in-line with the behaviors of New Anglers and Boaters, “New ASFs” are more likely to do other activities while fishing or boating. Fishing and boating trips are similar, partaking in a mix of fishing types and traveling to near locations.

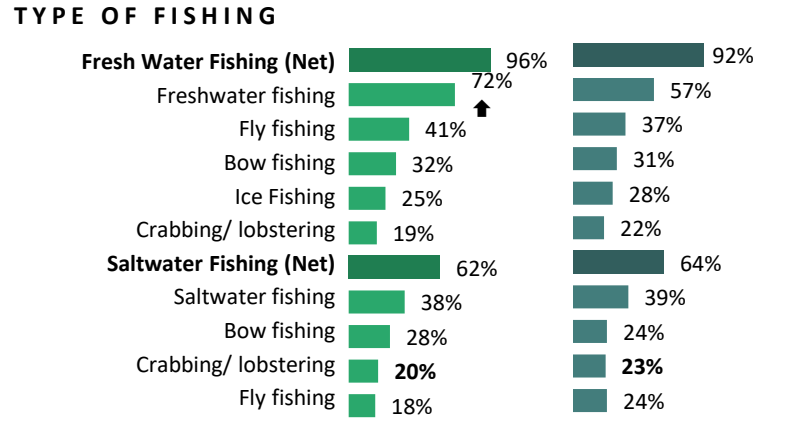
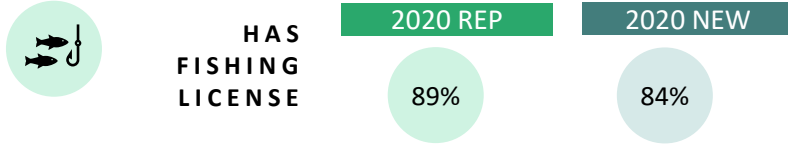
ADJACENT ACTIVITIES W/ FISHING

| | REP | NEW |
|----------------------------|-------|-------|
| Camping | 56% | 58% |
| Swimming | 47% | 62% ↑ |
| Motor Boating | 34% | 39% |
| Playing water sports | 33% | 46% ↑ |
| Kayaking/ Canoeing/ Rowing | 28% | 31% |
| Hiking/ biking | 22% | 37% ↑ |
| Sailing | 20% | 27% |
| Nothing, only Fishing | 15% ↑ | 9% |

ADJACENT ACTIVITIES W/ BOATING

| | REP | NEW |
|--|------|-------|
| Fishing | 65% | 71% |
| Swimming | 53% | 53% |
| Cruising on a boat/ riding around | 40% | 44% |
| Camping | 35% | 48% ↑ |
| Sunbathing | 32% | 33% |
| Hiking/ biking | 21% | 37% ↑ |
| Towed water sports | 21% | 31% |
| Transporting from one land mass to another | 16% | 24% |
| Nothing, only Boating | 7% ↑ | 1% |

FISHING OCCASION MEASURES



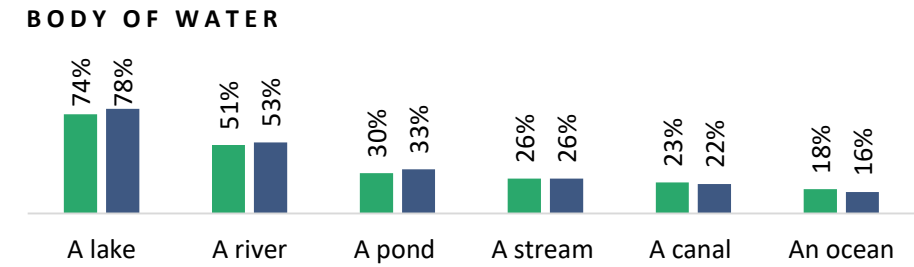
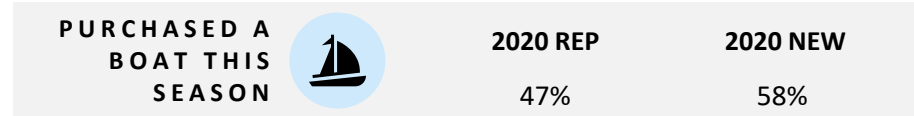
FISHING CADENCE

| | 2020 REP | 2020 NEW |
|------------------|----------|----------|
| Seasonally | 23% | 18% |
| Year-round | 58% | 45% |
| Special occasion | 19% | 36% |

DISTANCE TRAVELED

| | 2020 REP | 2020 NEW |
|------------------|----------|----------|
| Less than 1 hour | 55% | 62% |
| 1-1.5 hours | 25% | 22% |
| 1.5-3 hours | 11% | 11% |
| 3+ hours | 9% | 5% |

BOATING OCCASION MEASURES



BOATING CADENCE - P6M

| | 2020 REP | 2020 NEW |
|-------------------|----------|----------|
| 1x a week or more | 57% | 66% |
| Less Often | 43% | 34% |

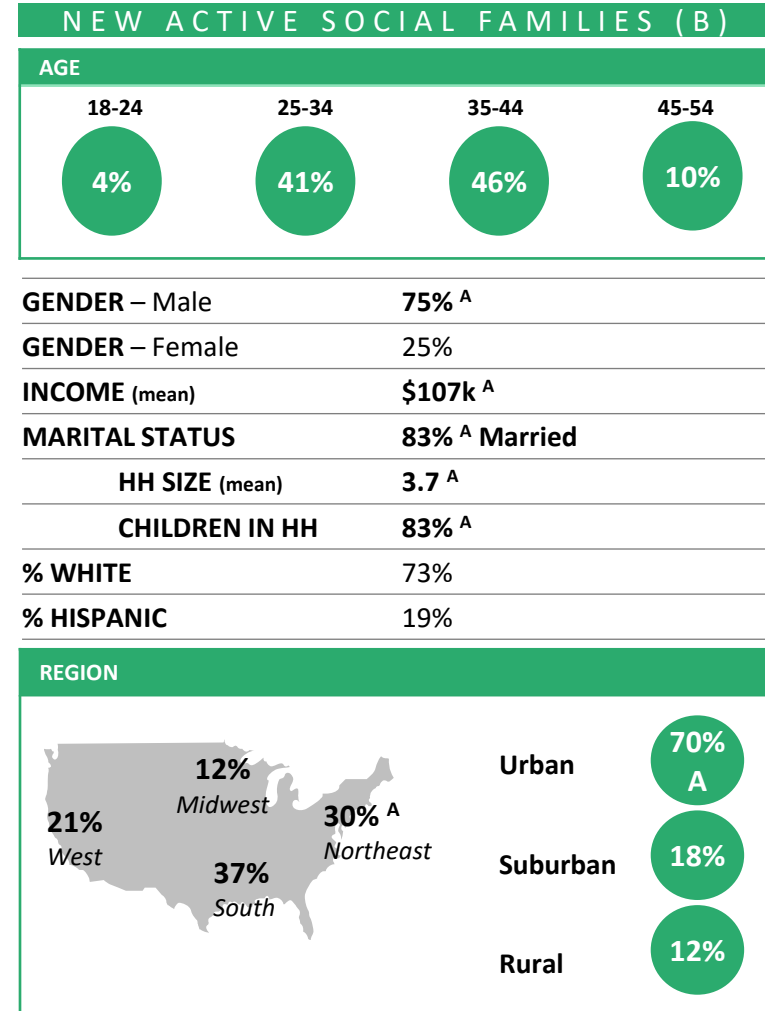
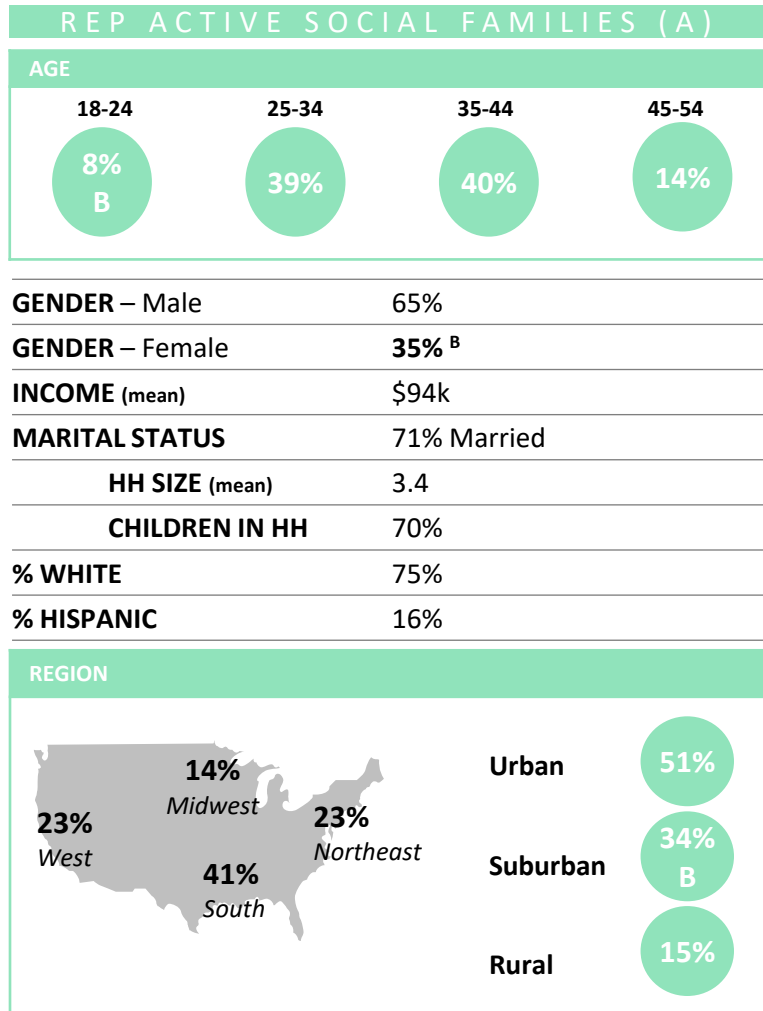
REASON FOR BOATING

| | 2020 REP | 2020 NEW |
|--|----------|----------|
| Friends/ family invited us to go boating | 53% | 42% |
| I had extra time because no other activities | 33% | 35% |
| I saw an ad about it on television | 33% | 31% |
| I had extra time because working less | 31% | 31% |
| I saw an ad about it online/ on social media | 22% | 29% |

New ASFs = New or Reactivated Anglers and Boaters who are part of the Active Social Family segment

NEW AND OVERALL ACTIVE SOCIAL FAMILY CONSUMERS

Demographically, the groups are similar, with “New ASFs” skewing as young families in more urban settings, in line with overall demographics of New Anglers and Boaters.

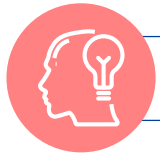


New ASFs = New or Reactivated Anglers and Boaters who are part of the Active Social Family segment
 Base: Rep Active Social Families (n=204); New Active Social Families (n=252)
 RESP_AGE, RESP_GENDER, USHHI3, USMAR2, HHCMP10, KIDS02, US01ETH, QMktSize_US, QRegionType
 Capital letter indicates statistically greater than noted group at 95%



Although some NCs have started fishing/boating for the first time recently, most have stories of starting as children, similar to ASFs, but were not overly interested or involved for some time. The influence of others to try these sports and a limited range of entertainment options during COVID-19 serve as common motivators.

Most ASFs tie to these sports stretch back to their childhood when a relative (often a father or grandfather) took them along during an outing.



Spark of Interest – multiple factors often sparked the interest of NCs

NEWCOMERS

- Moved to a new location
 - Family member moved nearby to a body of water
 - Nearer body of water, or new friends interested in fishing/boating
- Someone else convinced them to participate
 - Other family member, significant other, friend, their child
- Started during COVID-19
 - Lockdown limited entertainment options
 - Used internet to find entertainment options available during lockdown
 - YouTube sparked interest
 - Had interest, but COVID-19 allowed for additional time to participate
 - Bought boat with canceled vacation funds

ACTIVE SOCIAL FAMILIES

- Interest Cultivated as a Child (most common)
 - Participated with family member as a child (often father, grandfather, brothers etc.)
 - Grew up near a body of water, part of life/local culture
 - Boat rental during vacations as a child
- Interest Cultivated as an Adult
 - Tried for the first time on a vacation
 - Pulled in by friend/relative interested in fishing/boating, or significant other (who is often male)
 - Desire to try a new outdoor activity/hobby
- Media
 - Advertisements (fishing commercial)
 - Movies, documentaries, TV shows

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.

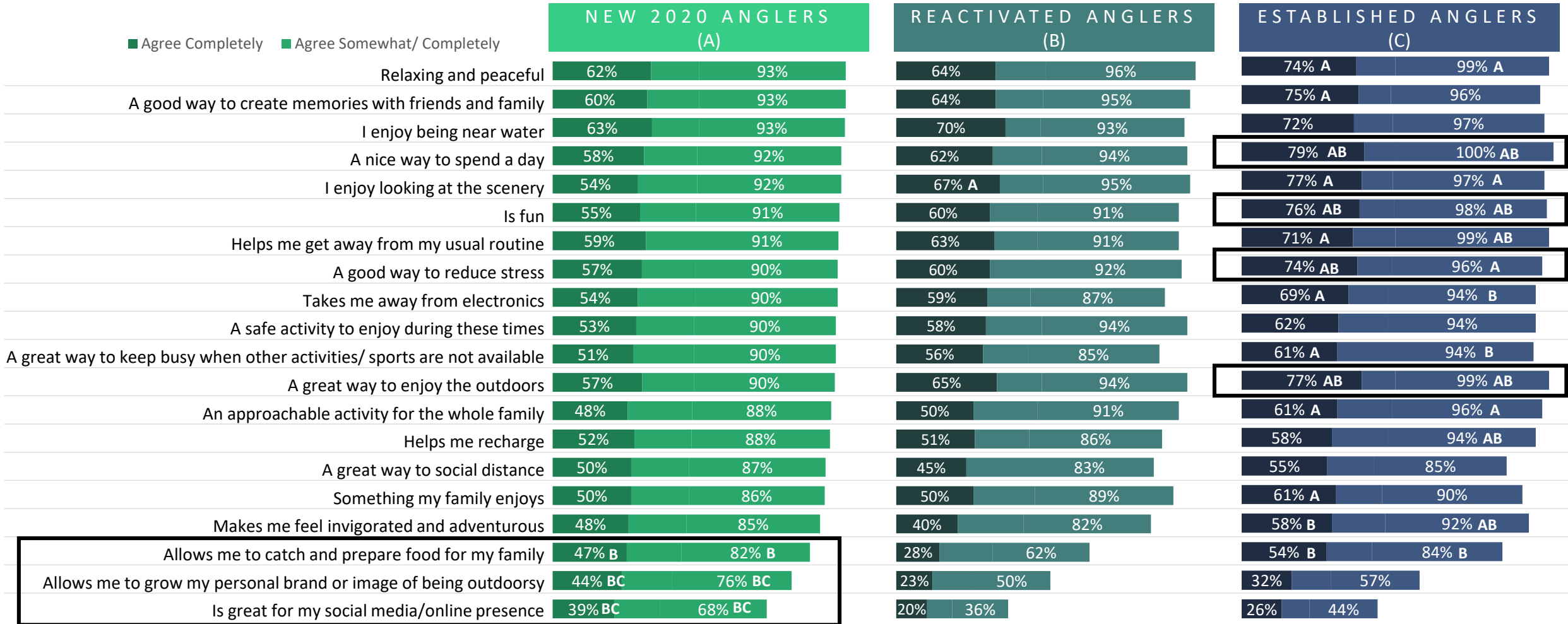
More recently, I began dating a man who enjoys fishing.

Fishing and boating has always been a family favorite, I remember when I was very little going fishing and boating with my dad and grandpa.





Relaxation, bonding, enjoying the water, scenery and having fun are universal drivers to fishing. Interestingly, New Anglers are more likely to cite catching food, growing a personal brand and driving social media presence as additional drivers, likely due to their younger age skew.

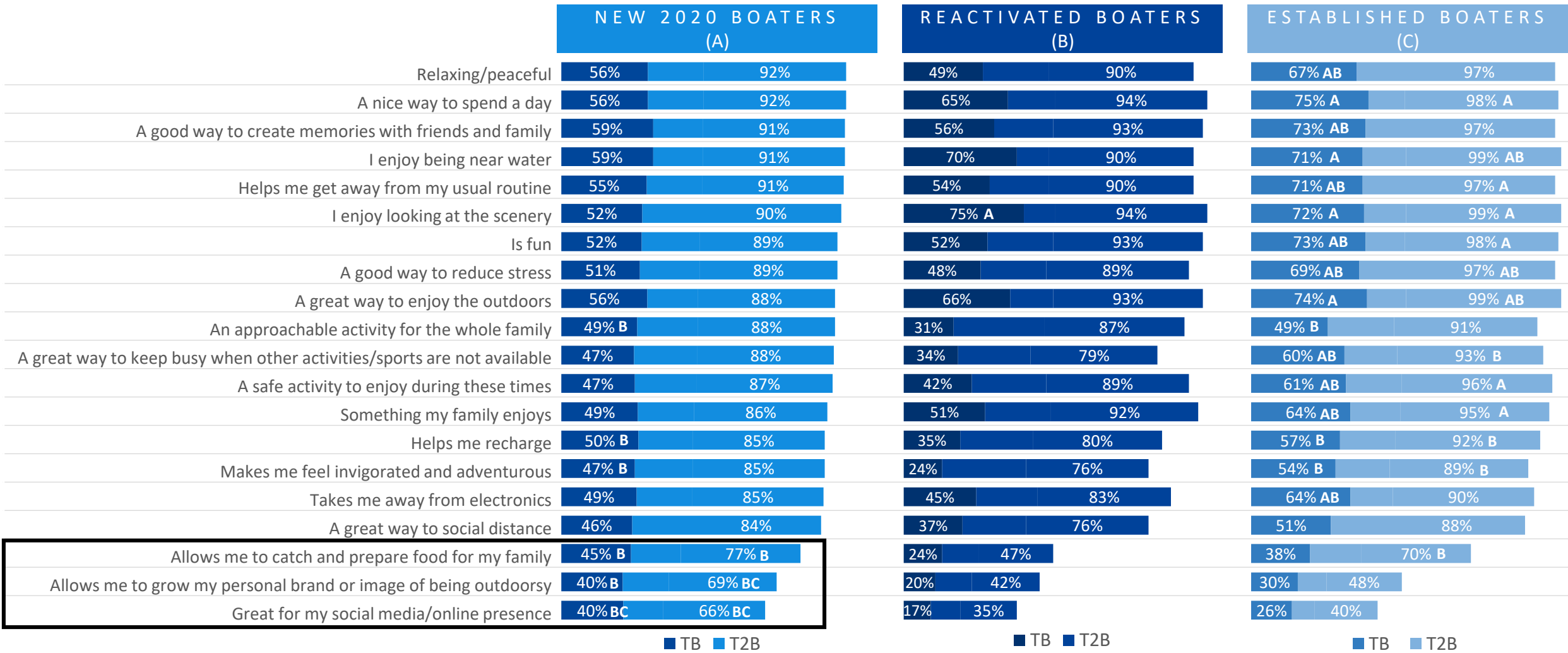


Base: Participated in Fishing or Boating: New 2020 Anglers (n=343); Reactivated Anglers (n=111); Established Anglers (n=140)
 B10. Thinking about why you go fishing, how much do you agree with the following statements? (TB/T2B) (Ranked to New Anglers T2B)
 Capital letter indicates statistically greater than noted group at 95%

BOATING MOTIVATIONS (AIDED)



Relaxation, being near water and having a nice day, making memories are universally, the motivations for all boaters. New Boaters are also motivated by the ability to catch dinner and impact their personal social media presence. For Established Boaters, all motivations are greater, likely contributing to why they continue to boat.

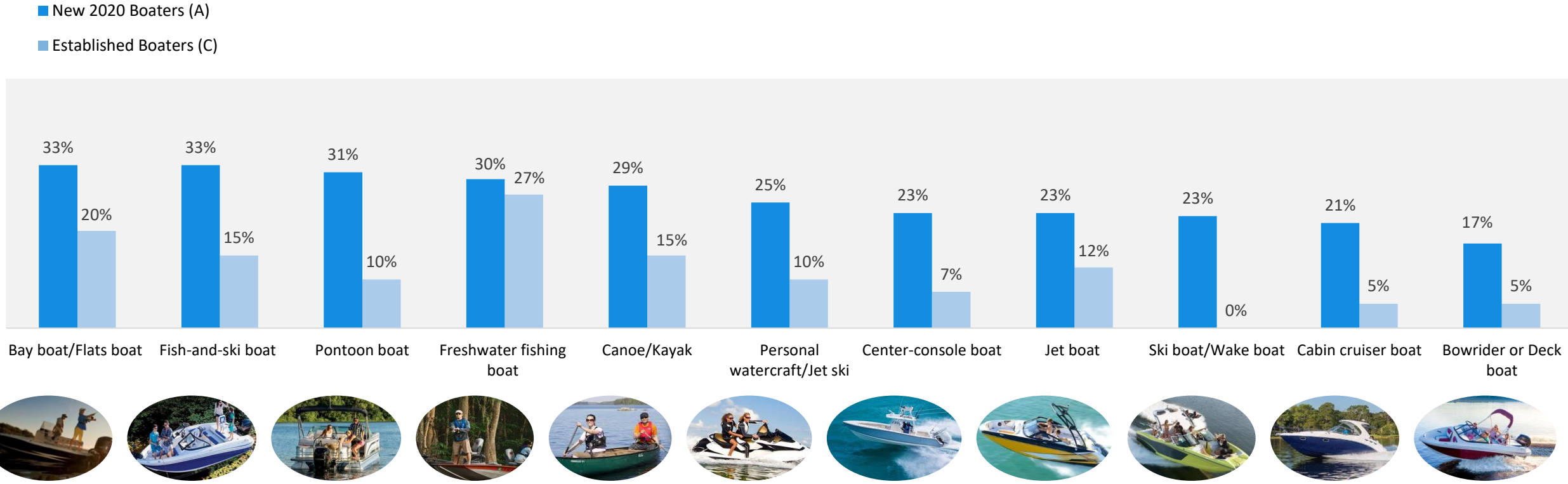


Base: Participated in Fishing or Boating: New 2020 Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104)
 B10. Thinking about why you go boating, how much do you agree with the following statements? (TB/T2B) (Ranked to New Boaters T2B)
 Capital letter indicates statistically greater than noted group at 95%

BOAT TYPES OWNED



The most common types of boats owned among New Boaters are Bay Boats, Fish-and-Ski Boats, Pontoon Boats and Freshwater Fishing Boats, the latter the most common among Established Boaters



*Caution, low base size
 Base: Owns A Boat: New 2020 Boaters (n=147); Reactivated Boaters (n=16*); Established Boaters (n=41*) D4. What type of boat(s) do you own?
 Capital letter indicates statistically greater than noted group at 95%



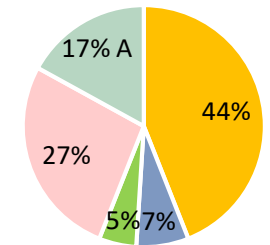
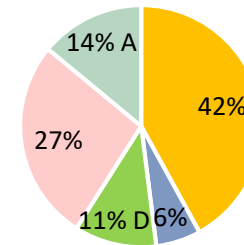
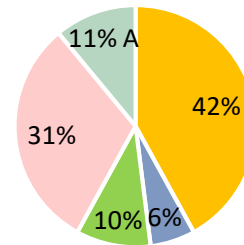
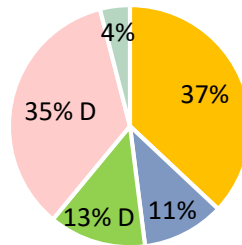
To ensure fishing continues, helping New Anglers reach their goals will be critical. Focusing on highlighting ways to master the basics and encourage trial and experimentation with different areas, types of fish/bait and techniques.

Ensuring information on where to go and where to find **affordable** equipment will help retain them (and other Anglers), as expense was a key barrier.

| | NEW 2020 ANGLERS (A) | REACTIVATED ANGLERS (B) | ESTABLISHED ANGLERS (C) | LAPSED ANGLERS (D) |
|-------------------------------------|----------------------|-------------------------|-------------------------|--------------------|
| ADDITIONAL INFO NEEDED | | | | |
| Different ways to fish | 47% BCD | 20% | 20% | 18% |
| What types of bait I need | 37% D | 35% | 36% | 29% |
| Where to go to fish | 36% | 40% | 40% | 39% |
| What types of equipment I need | 32% C | 25% | 23% | 30% |
| Types of fish available near me | 24% | 27% | 19% | 19% |
| Where to buy/rent fishing equipment | 22% BC | 12% | 7% | 24% BC |
| Fishing regulations | 19% | 30% A | 43% AB | 46% AB |
| Where to go for information | 15% | 8% | 18% B | 23% AB |

BEST WAY TO BE REACHED

- Email
- Phone Calls
- Text Messages
- Social Media
- Other



Base: Participated in Fishing/Boating: New Anglers (n=343); Reactivated Anglers (n=111); Established Anglers (n=140); Lapsed Anglers (n=381)
 E6. What information must you know before you go fishing again this year? ? (Ranked to New Anglers) E7. What is the ideal way to receive information about fishing?
 Capital letter indicates statistically greater than noted group at 95%





Likewise, to retain New Boaters, help them avoid common mistakes and errors. Make sure classes on boat operation are easy to find and affordable. Provide classes or how-to sessions on various topics like equipment, renting, different types of boats, local areas for boating and regulations.

To encourage Lapsed Boaters back to the sport, providing them with information on where to rent equipment, where to go boating near them and resources for general information and regulations. The best way to reach these consumers is via email.

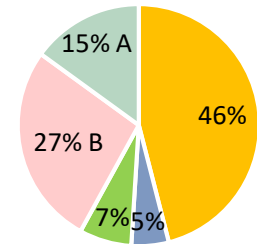
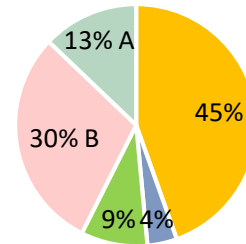
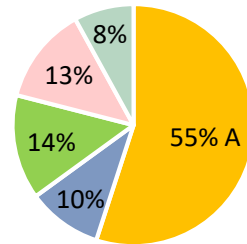
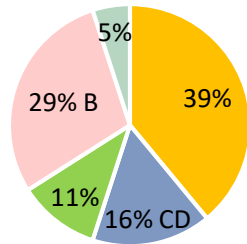
| | NEW 2020 BOATERS (A) | REACTIVATED BOATERS (B) | ESTABLISHED BOATERS (C) | LAPSED BOATERS (D) |
|--|----------------------|-------------------------|-------------------------|--------------------|
|--|----------------------|-------------------------|-------------------------|--------------------|

ADDITIONAL INFO NEEDED

| | NEW 2020 BOATERS (A) | REACTIVATED BOATERS (B) | ESTABLISHED BOATERS (C) | LAPSED BOATERS (D) |
|-------------------------------------|----------------------|-------------------------|-------------------------|--------------------|
| How to drive a boat | 34% | 23% | 26% | 28% |
| What types of equipment I need | 33% BCD | 17% | 22% | 23% |
| Where to buy/rent boating equipment | 28% C | 30% | 17% | 39% AC |
| The different types of boats | 29% BCD | 17% | 15% | 18% |
| Where to go boating | 29% | 39% | 34% | 38% A |
| Where to go for information | 11% | 11% | 14% | 24% ABC |
| Boating regulations | 16% | 23% | 33% A | 34% AB |

BEST WAY TO BE REACHED

- Email
- Phone Calls
- Text Messages
- Social Media
- Other



Base: Participated in Fishing/Boating: New Boaters (n=245); Reactivated Boaters (n=71); Established Boaters (n=104); Lapsed Boaters (n=377)
 E6. What information must you know before you go boating again this year? (Ranked to New Boaters) E7. What is the ideal way to receive information about boating?
 Capital letter indicates statistically greater than noted group at 95%

