



**RBFF STATE
MARKETING
WORKSHOP**

Retention Research Review

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Agenda

01 – The Retention Opportunity

02 – Retention Key Takeaways

Churn

Motivations & Constraints

03 – Research Gaps & Needs

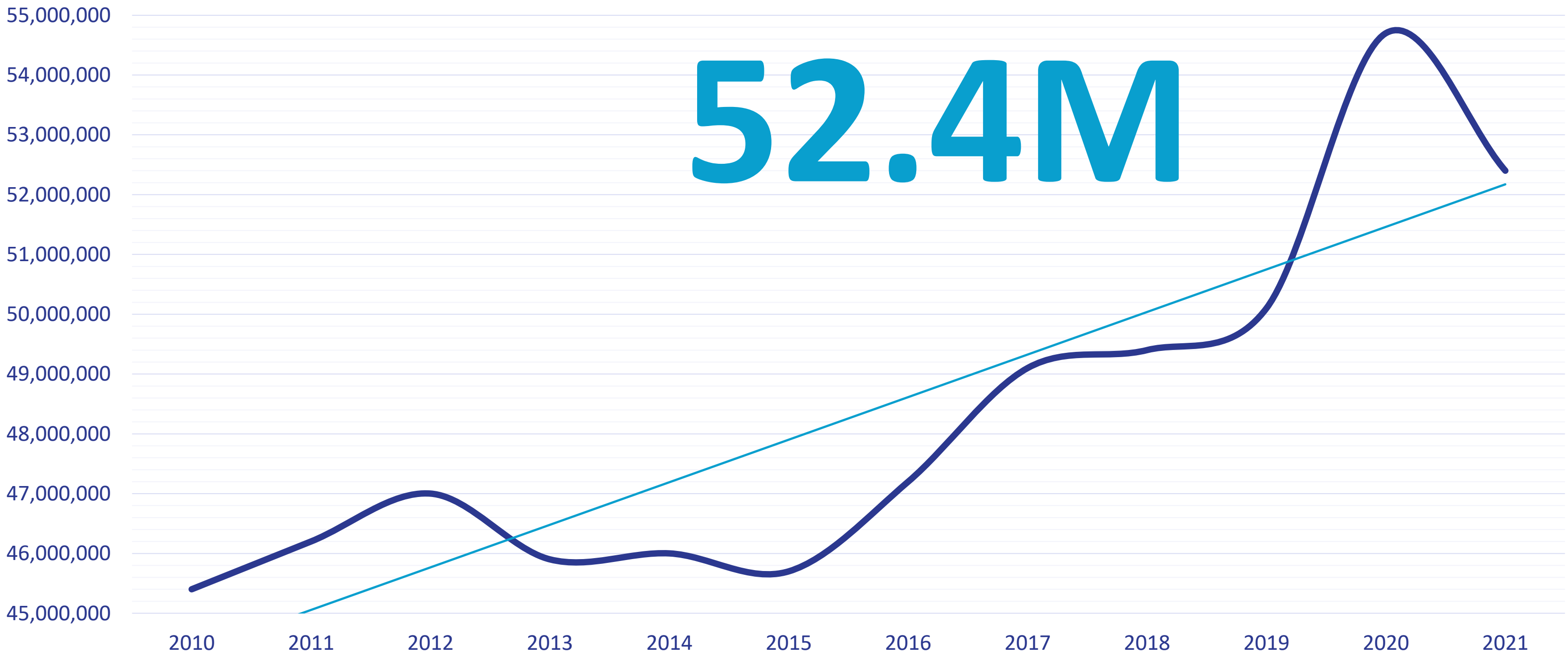
04 – What's Next?



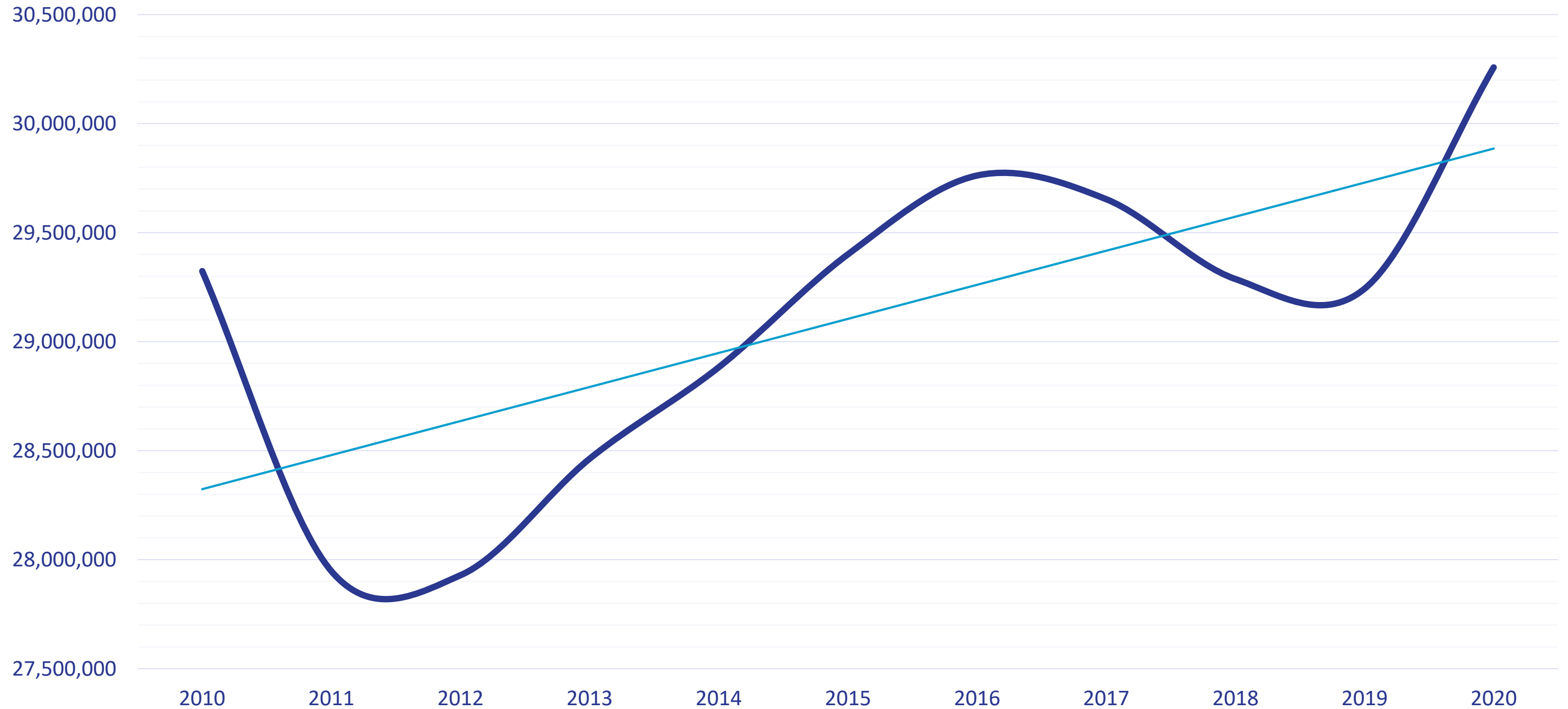
The Retention Opportunity



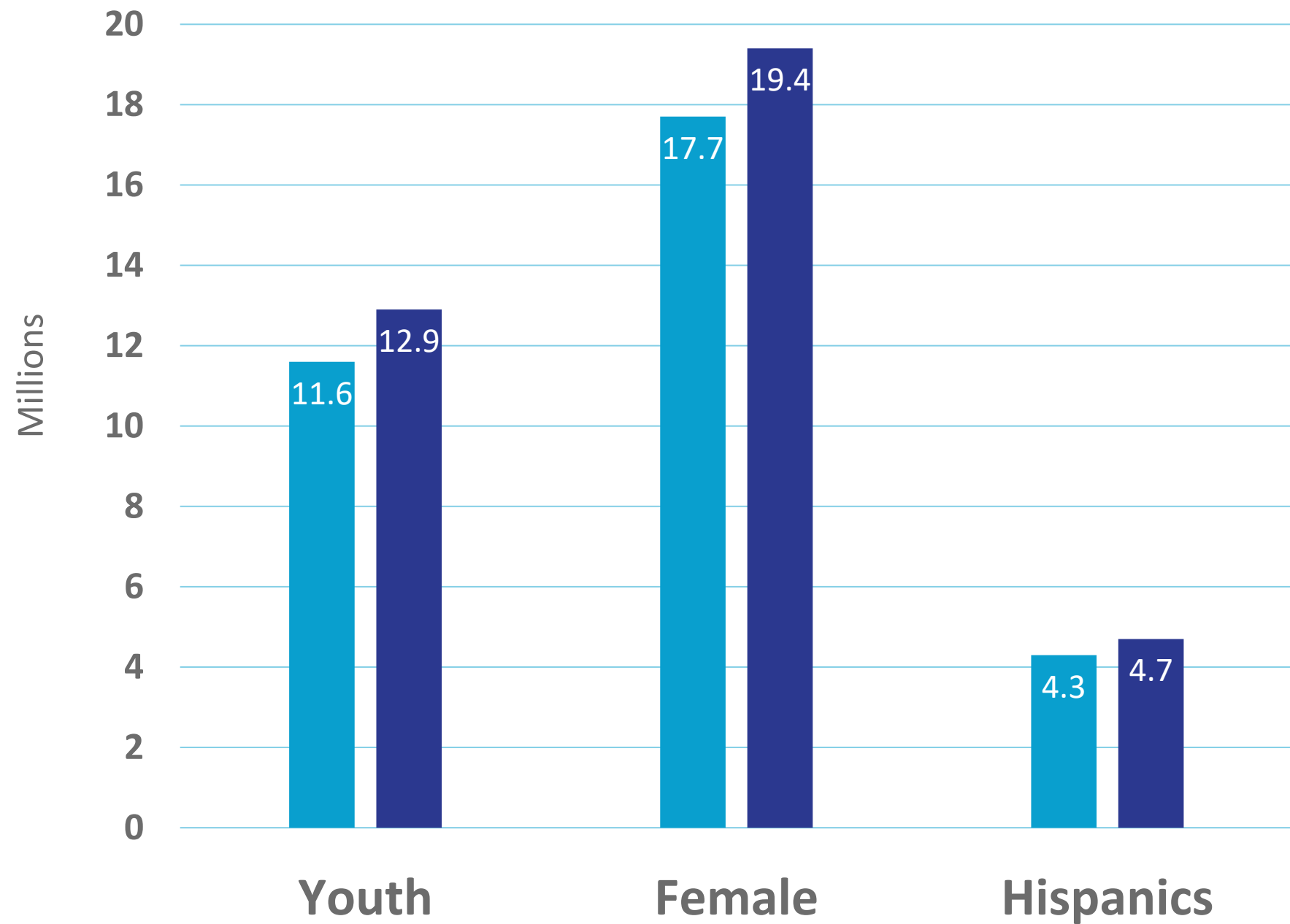
Fishing Participation: 2010 to 2021



Fishing License Sales: 2010 to 2020

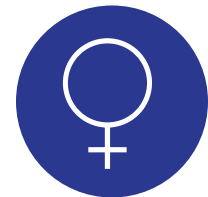


Participation Strong Among Key Segments 2018 vs. 2021



Youth

12.9 million youth (ages 6-17) went fishing in 2021, up 11% over 2018.



Female

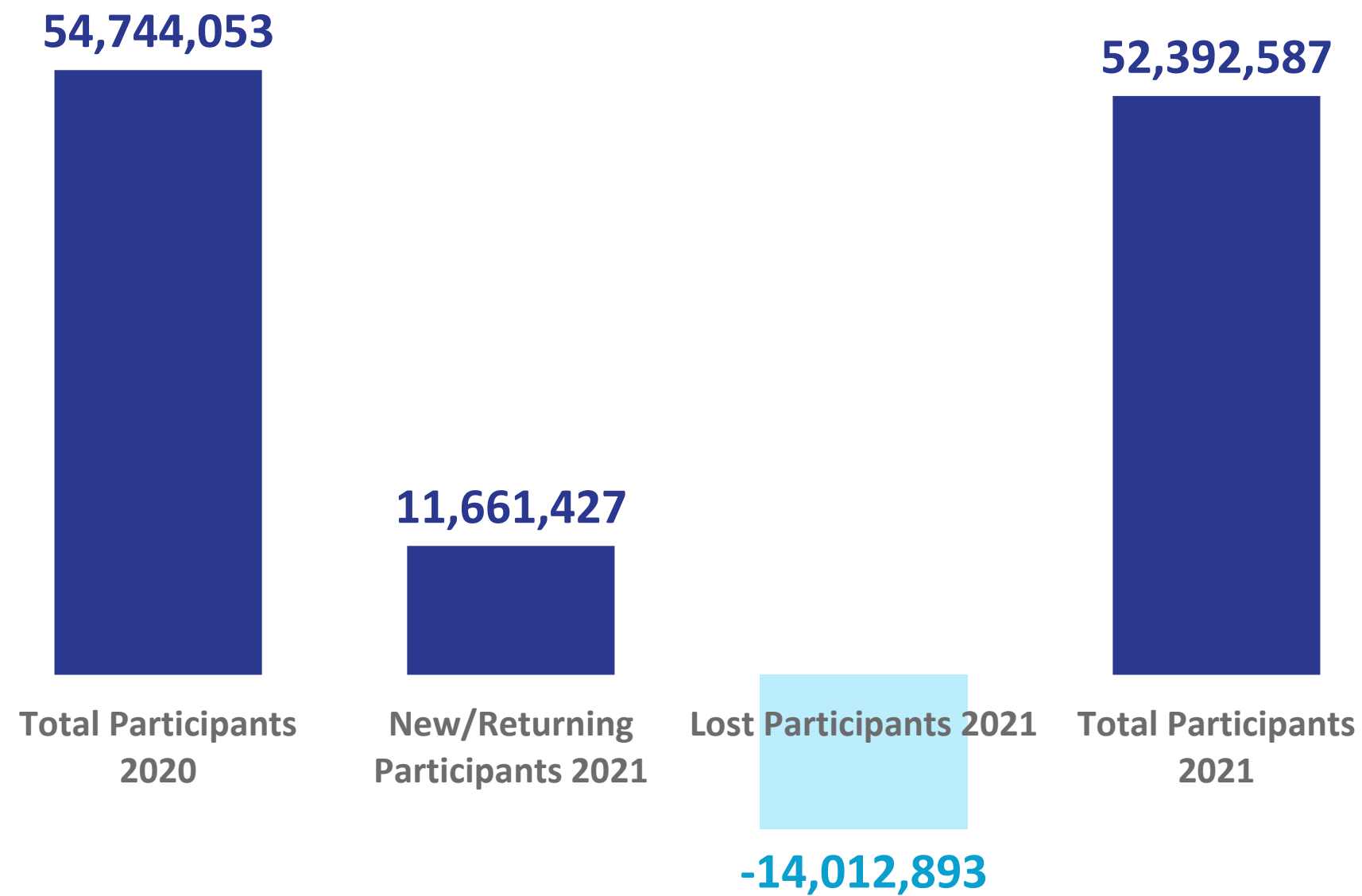
19.4 million women went fishing in 2021, up 10% over 2018.



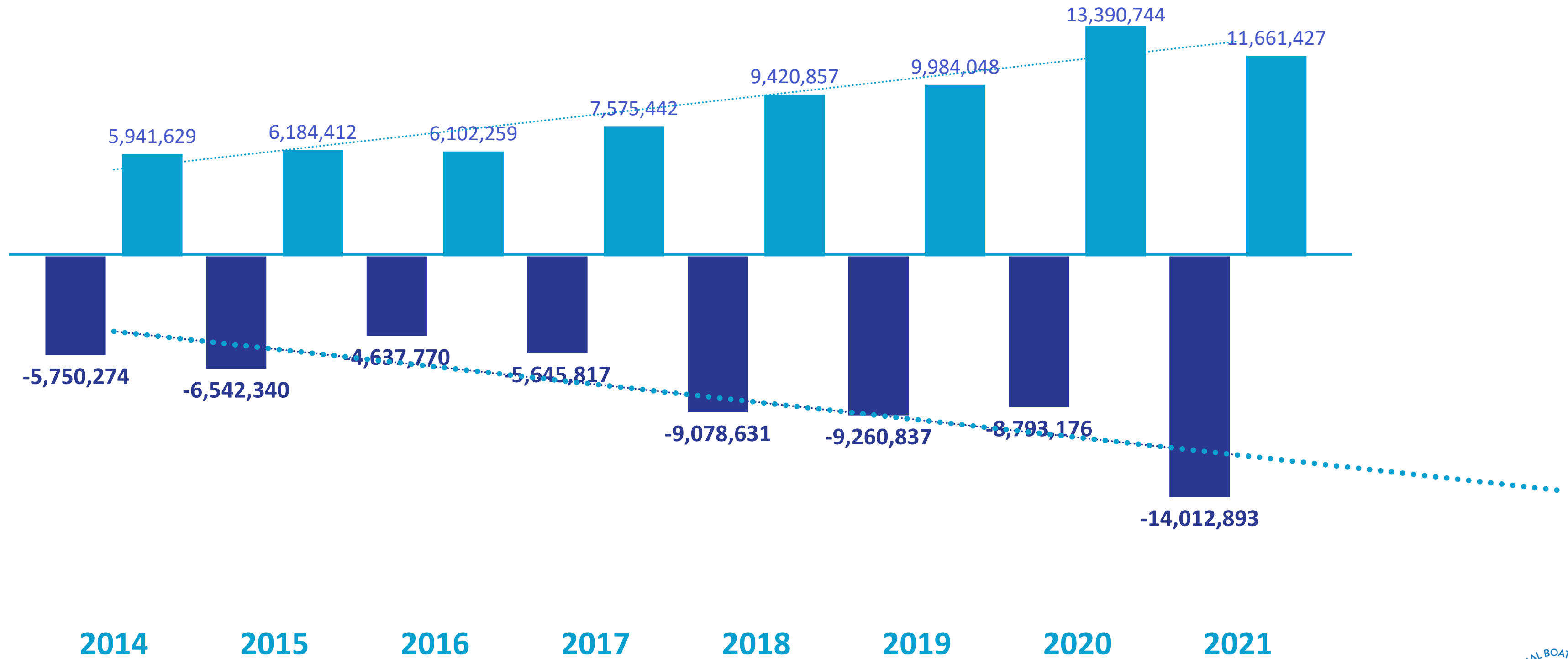
Hispanics

4.7 million Hispanics fished in 2021, up 10% over 2018.

Lost Participants Exceeds New/Returning



New & Returning Anglers vs. Lost Anglers





Retention Key Takeaways





Churn

Churn in Fishing



- ★ Between 8 and 14 million anglers are lost each year.
- ★ New anglers join the sport at a rate of 18% per year, while fishing loses participants at a rate of 19.4% per year.
- ★ 25-33% of a state's fishing license purchasers do not renew the following year.

Churn in Boating

- ✓ 40-50% of boat buyers do not continue to own a boat after 5 years.
- ✓ Most boat buyers make up their mind after 4 years whether to continue or quit.
- ✓ Critical time for retention: years 2 through 4
- ✓ Attrition particularly high among those purchasing pre-owned vs. new.



Key Observations

01 Likelihood to “churn” increases with age.

02 Retention is an increasing issue as a participant ages.



Motivations & Constraints



Motivations for Fishing & Boating



Participants generally seek multiple satisfactions & have multiple motivations for participating.

Example:

- Outdoor factors (scenery)
- Thrill factors (excitement)
- Relaxation factors (restful)
- Family factors (spending time with children)
- Escape factors (solitude)
- Experimental factors (vacation)

Constraints to Participation

- ✓ Many top constraints are social (Ex: time)
- ✓ Important non-social constraints include lack of access and crowding.
- ✓ Constraints to fishing change with age
- ✓ Important constraints to boating include lack of time, lack of access and boaters' feelings that they lack skills and knowledge.





Research Gaps & Needs





There's more research on fishing issues vs. boating

Much of the available research on boating participation and retention tends to be sporadic and inconsistent (or inaccessible).

License & Registration Databases Are Limited in Measuring Churn

There could be duplicate entries, bad data and varying levels of database maintenance and quality.





Many Urban Fishing Programs Are Still Relatively New

Studies regarding urban fishing generally showed positive results, but the full impact remains unknown.

Catch-Related Motivations Need to be Further Explored

There was little research on how many no-catch outings would drive the majority of anglers away.





The Retention Effect of Stocking Programs is Not Well Understood

What if fish stocking wasn't done?

Would people stop fishing?

The Psychology of Churn is Not Well Understood

Is it competition from other activities? Too few invitations to go fishing or boating? Solid but not overwhelming interest in continuing to fish or boat?





What's Next?





WHAT'S
NEXT?



Collect more data and information around the psychology of churn



Identify specific opportunities around retention



Build programs and training for stakeholders



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