RBFF RETAIL CUSTOMER EXPERIENCE ASSESSMENT – FLY FISHING

EXECUTIVE SUMMARY AND ANALYSIS

JULY, 2015

Prepared for:

The Recreational Boating & Fishing Foundation

Alexandria, Virginia

AND

The American Fly Fishing Trade Association

Bozeman, Montana

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REPORT CONTENTS

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I. OVERVIEW AND PURPOSE

The mystery shopping program designed and implemented by Market Viewpoint, LLC (MVP) will provide the Recreational Boating & Fishing Foundation (RBFF) and the American Fly Fishing Trade Association (AFFTA) with an assessment of the current fly fishing retail shopping experience by three different demographic groups in a variety of store types and in four specific regional markets - Northeast, Southeast, Rockies, and the Northwest. The study will include a summary of the findings to determine areas for enhancement in an effort to increase fly fishing license and gear sales.

II. PROJECT METHODOLOGY

The information presented in this section outlines the methods and procedures used by Market Viewpoint, LLC (MVP) to conduct this study.

Preliminary Activities

Prior to the start of this project, the management of The American Fly Fishing Trade Association, The Recreational Boating & Fishing Foundation and Market Viewpoint, LLC teleconferenced to discuss the purpose of this mystery shopping study and the methods that would be used on behalf of AFFTA and RBFF to complete the assignments. The project structure and duration were also discussed at these meetings with areas of responsibility outlined.

The first phase of the project began on March 13, 2015. During this phase, the evaluation instruments that would be used by the mystery shoppers were designed and refined, target cities were selected, mystery shoppers were vetted and trained, retail store categories were identified and stores within those categories were chosen to be shopped and loaded into the Market Viewpoint software. Stores in each market to possibly include in these studies were suggested by AFFTA. MVP made phone calls to the stores to confirm they were open for business, their hours, if they carried fly fishing equipment and which sold fishing licenses. All parties agreed on the final list as a starting point with the caveat that other stores may need to be identified to help in reaching the goal of the project.

The second phase of the project began on April 9, 2015 and concluded on June 26, 2015. During this phase, mystery shopping assignments were assembled and distributed to appropriate mystery shoppers. Data was physically collected in the targeted stores in the targeted regions. The raw data reports were returned to Market Viewpoint, LLC's headquarters for processing and analysis.

The third phase of this research project began on June 29, 2015 with the analysis of the data and the creation of our final report of observations and recommendations.

Implementation Activities

STEP 1 – Identifying the AFFTA/RBFF/MVP Account Team.
The first step in the program design process was to identify a senior level account manager, schedulers, editors, and IT personnel for this project. It was at this stage of the implementation that the Market Viewpoint single point of contact was named, along with an appropriately experienced backup. This backup was named to assist in the servicing of the account in case of emergencies. It was at this stage that AFFTA and RBFF also named their primary points of contact.

STEP 2 – Design of Survey Instruments
Market Viewpoint met with members of the AFFTA/RBFF implementation team to design the survey instrument that was used by the mystery shoppers to collect the data related to their experience. Forms were programmed to make them web-based for the shoppers to access and use. This resulted in AFFTA/RBFF receiving professional, quality reports. The report designs were established and approved by AFFTA/RBFF before the mystery shoppers were assigned to shop. For consistency in analysis, the form was not changed throughout the course of this study.

Market Viewpoint scheduled time for testing the survey instruments, putting them through as many real-life situations as possible prior to going live, to ensure that each survey instrument performed flawlessly for our shoppers and delivered accurate data to our client.

STEP 3 – Shopper Selection and Training
One of the most important parts of the mystery shopping process is shopper selection and training. For all markets, Market Viewpoint required that shoppers have no employment history with any of the retail establishments visited for this study, no employment ever for anyone in the household at these locations, and that they must be 18 years of age or older. They were also required to tell us of their familiarity with the sport of fly fishing.

Shoppers were selected, screened, and tested by our experienced schedulers, assuring that they met both demographic and quality requirements for this study. Detailed instructions about how to conduct the shop were prepared to correspond with the questions in the reporting form. These instructions were communicated to the selected shoppers through telephone and video training sessions and web-based learning modules.

STEP 4 – Conducting Store Evaluations
Mystery shoppers conducted their evaluations and prepared their reports. These were sent to our central office for quality control, processing, and distribution. This quality control process assured that AFFTA/RBFF received accurate and timely information. Stores were visited weekly throughout Phase Two of this project (April 9, 2015 through June 26, 2015), with shoppers visiting on random days of the week and at random times. The reports highlight both existing strengths in each store's customer service and fly fishing gear, as well as areas where there is opportunity for improvement. The Market Viewpoint account management team tracked shopper assignments carefully and closely monitored the rate of return for completed reports.

Mystery shoppers were paid for their time and report preparation by Market Viewpoint according to current market rates for these types of mystery shopping assignments. Shoppers were not required to make a purchase for this study.

STEP 5 – Reporting System
The software system used by the account management team of Market Viewpoint allowed us to select shoppers based on AFFTA/RBFF specified criteria and our shopper scorecard system. It allowed us to confirm with shoppers that they had accepted the assignment, reminded them of due dates, tracked shops through the editing and review process, and tracked the successful delivery of store specific reports to the RBFF organization, the control organization for this study.

Market Viewpoint's Web Reporting System also provided AFFTA/RBFF users the ability to access reports 24/7 from any internet-enabled device. Our system is password protected and the management of AFFTA and RBFF were asked to designate the individuals who needed and wanted access to the raw data and reports. The system retains reporting results in a SQL database allowing customized reporting capabilities based on the needs of AFFTA/RBFF including trending (for comparison in future studies), graphing, date ranges, exception, correlation, overview, interactive (drilldown) and item analysis.

STEP 6 – Ongoing Communication
Throughout this process, the Market Viewpoint account management team made itself available to answer questions, issue progress reports, attend meetings and be readily available when the AFFTA/RBFF staff needed our input or assistance on issues. The AFFTA/RBFF staff did the same, making their staff accessible and available to assist when and where necessary with this project.

Targeted Areas of Study

Selected Regions:
The four regions that appear below were chosen for this study by the management of AFFTA and RBFF based on the fly fishing activity conducted in these areas of the United States:

Northwest (Idaho, Oregon, Washington)
Rockies (Colorado, Utah, Montana)
Northeast (Maine, Massachusetts, Connecticut, New York, New Hampshire, New Jersey)
Southeast (Florida, Georgia, North Carolina, South Carolina)

Types of Retail Stores Visited:

Big Box:
Bass Pro
Cabela's

Independent
Fly Fishing Specialty (includes Orvis where available)

Store Counts
Northeast - 9 stores
Northwest - 9 stores
Rockies - 14 stores
Southeast - 13 stores

Stores were shopped on multiple occasions to account for thorough and authentic data collection. We have removed actual store names for privacy.

Shopper Demographics:
Hispanic Community Shopper
Single Female – (18 – 35 age cohort, millennial)
Traditional Family

Experience Level:
Non-Experienced but wants to fly fish
Experienced – some general fishing experience and a desire to try fly fishing

Scenarios Used By Shoppers (Fishing Study):

1. I have never fished but am interested in fly fishing. Can you help me?
2. I have some experience fishing but want to try fly fishing. Can you help me with that?

Note: Scenarios for this study were chosen by the individual shopper for the sake of authenticity. It was important that each shopper be comfortable with the situation they were going to carry out so that they could confidently answer any questions that might be asked of them by the sales representative.

Specific questions to be answered by this study:
Report should include if an ideal customer service experience was created by:

1. Educating the consumer
2. Product suggestions
3. Product demonstrations
4. Suggestions of where to fish
5. Suggestion that a license be purchased
6. Overall shopper experience

Suggested Frequency for the Fly Fishing Study

Market Viewpoint suggested a goal of 360 completed mystery shops for this study. The geographic regions, store types, and demographic group counts appear below:

	Hispanic x3	Single Female/Mother x3	Traditional Family x3
Northeast			
Big Box x2	6	6	6
Independent/Specialty x8	24	24	24
Southeast			
Big Box x2	6	6	6
Independent/Specialty x8	24	24	24
Rockies			
Big Box x2	6	6	6
Independent/Specialty x8	24	24	24
Northwest			
Big Box x2	6	6	6
Independent/Specialty x8	24	24	24
Total shops per Target Audience	120	120	120

Actual Frequency for the Fly Fishing Study

The actual number of mystery shops conducted in the four geographic regions for each of the demographic groups studied appears below. The actual number of evaluations for the fly fishing study resulted in a total of 240 mystery shops. The breakdown of mystery shops by region, store type, and demographic group is as follows:

	Hispanic x3	Single Female/Mother x3	Traditional Family x3
Northeast			
Big Box x2	2	6	4
Independent/Specialty x8	10	15	15
Southeast			
Big Box x2	4	6	7
Independent/Specialty x8	3	20	17
Rockies			
Big Box x2	3	5	3
Independent/Specialty x8	8	24	28
Northwest			
Big Box x2	2	6	6
Independent/Specialty x8	8	19	19
Total shops per Target Audience	40	101	99

Survey Instrument Category Definitions

Fly Fishing Study

First Impressions – Yes/No response from the shopper of whether or not they would purchase fishing equipment in this store based upon their immediate reaction to the fishing gear area or aisle of the store. Review includes cleanliness, organization of product, range of selection and appearance.

Greeting – Comprised of three questions: Were employees identifiable with attire or name tags; whether or not the shopper was approached by the salesperson or had to seek one out; and then, once engaged in conversation with the salesperson, the welcome and demeanor of the individual, including if they asked about their level of fishing experience.

Needs Assessment – The first question was to find out if the salesperson asked if the shopper was an experience angler or was new to fishing.

If the shopper told them they were new to fly fishing, the salesperson was evaluated on whether they asked if the shopper had experience with conventional fishing, what it is about fly fishing that is attractive to you, and where the angler was looking to fish.

If the shopper told them they had some conventional fishing experience, the salesperson was evaluated on whether they asked where the angler was looking to fish, what they needed assistance with, and if there was any local information the salesman could provide to the angler.

Sales Process Evaluation – We evaluated the salesperson on the following traits. The shopper was to check all that applied to the visit:

- Listening to the customer's needs
- Treating the customer with respect
- Understanding customer's needs
- Showing the customer items matching those needs
- Showing products from various manufacturers
- Cross promoting the purchase of gear and equipment with a license purchase
- If they were knowledgeable about the products
- Providing education about use of products
- Allowing the customer to handle and examine products
- Recommendation of some place to go fishing
- Offering products in a wide variety of price points

Close – The salesperson was evaluated on the following. The shopper was to check all that applied to the visit:

- Inviting the shopper to make a purchase
- Inviting the shopper to purchase a fishing license (if applicable)
- Offering fishing regulations
- Educating/revealing that license dollars go toward conserving natural resources
- Requesting contact information for future mailings or for sharing with a state agency
- Offering information about fishing-related events or clinics.

Product Presentation – These questions were to provide information on how the products are displayed and presented.

The first question asked if the sections in the store were clearly marked so that the shopper could find the fishing equipment. This applied to the Big Box store classification only.

The second question was to discover how the fishing equipment was presented. Did the product packaging distinguish between type pf fishing conditions? Was there bi-lingual packaging? Were the flies easily accessible? Was the fly area well lit? The shopper was to check any that applied.

The third question asked if the shopper felt comfortable shopping in that section of the store.

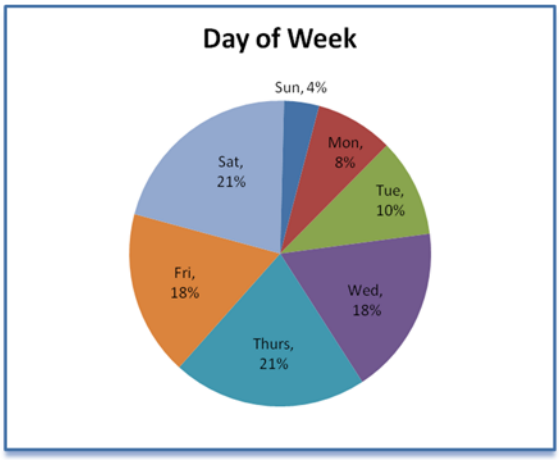
Overall Impressions – The responses provided in this question represent the opinion of the shopper based on this visit to this particular location.

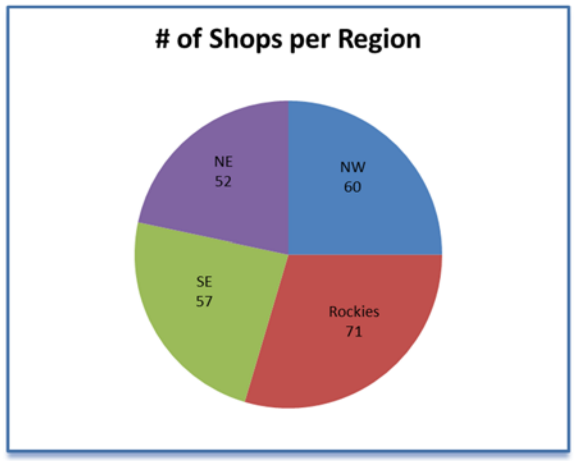
- Did the shopper feel welcomed, valued, and informed as a customer in that store?
- Would the shopper be inclined to make a fishing related purchase from that store?
- If the shopper would recommend the store to others (friends and family).

III. SURVEY RESULTS AND DATA SUMMARY

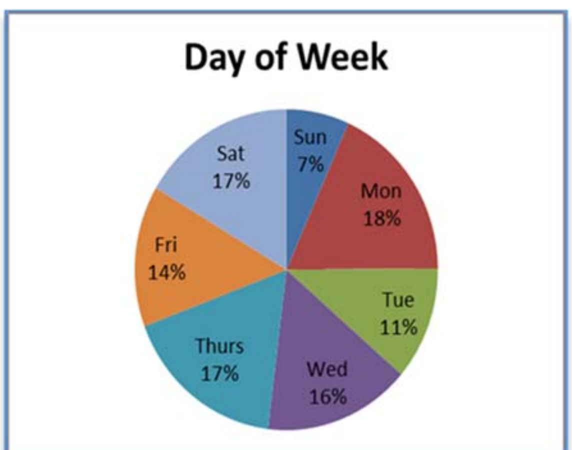
The information, charts, graphs, and commentary that appear below are related to the 2015 study conducted for the fly fishing industry. Comparison is made to the study conducted in 2014 for RBFF for the general fishing industry.

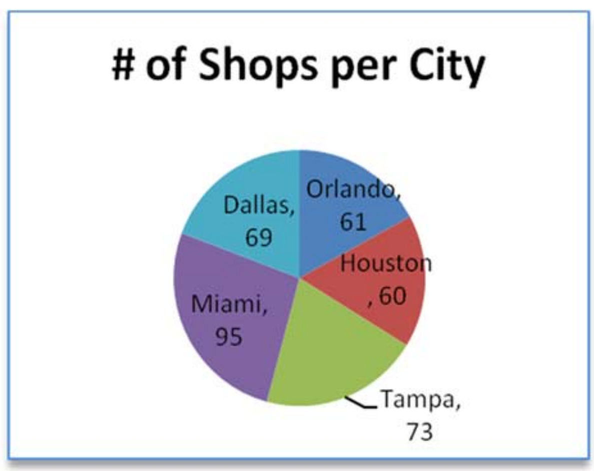
Fly Fishing Study



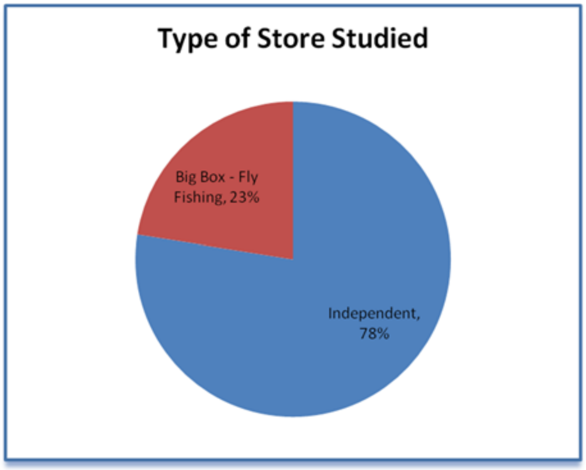


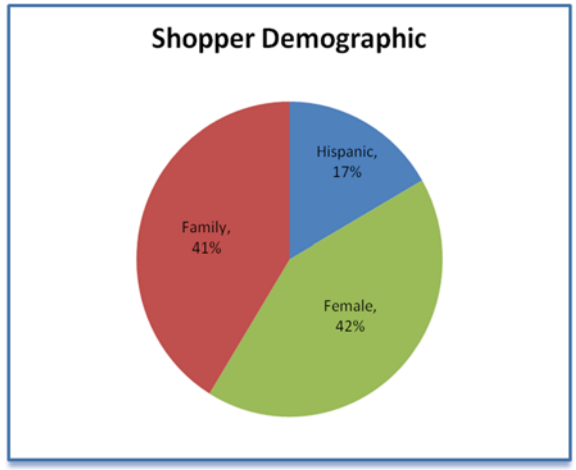
Fishing Study



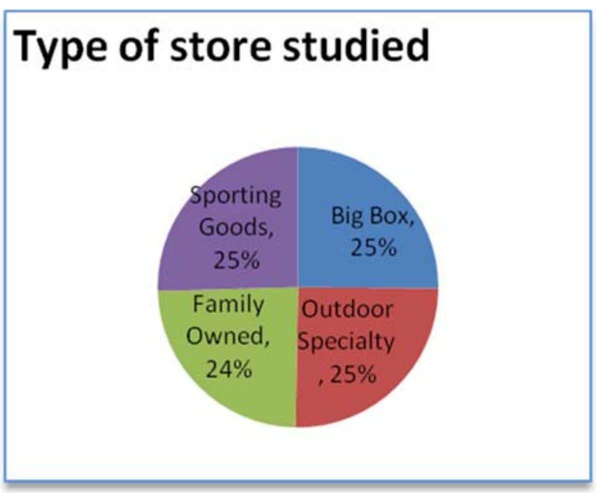


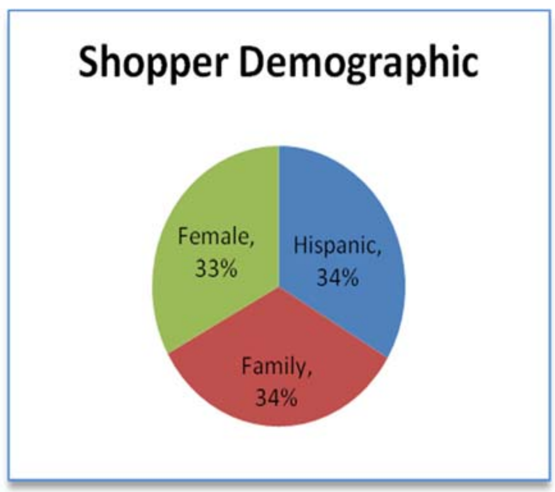
Fly Fishing Study

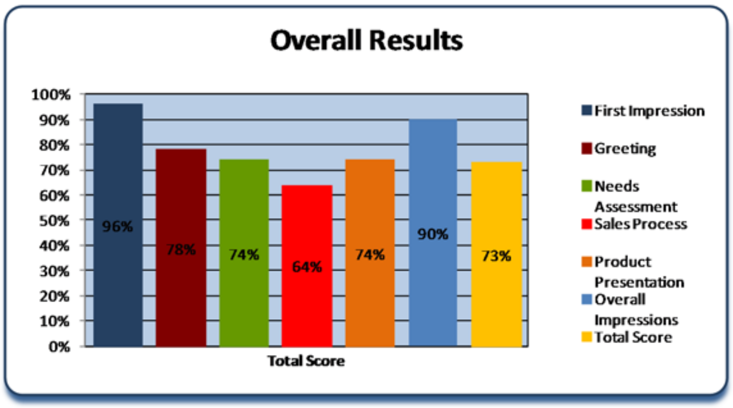




Fishing Study

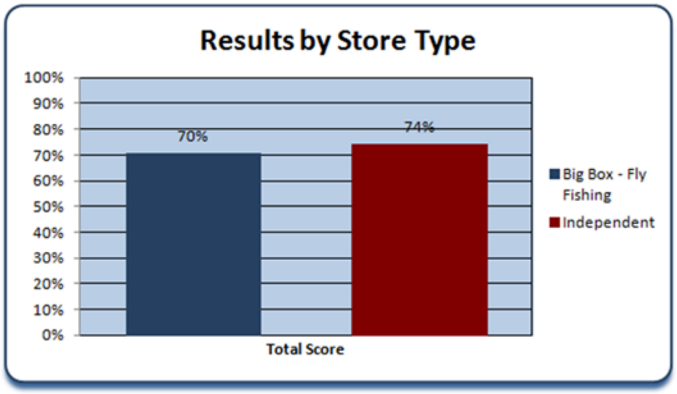






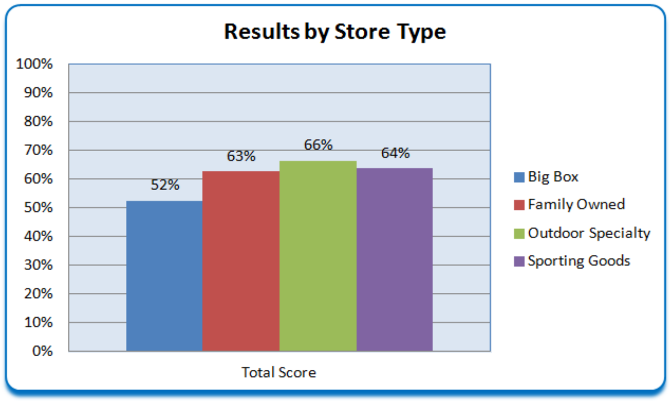
	OVERALL RESULTS
First Impression	96%
Greeting	78%
Needs Assessment	74%
Sales Process	64%
Product Presentation	74%
Overall Impressions	90%
Total Score	73%

Fly Fishing Study



	54	186
	Big Box - Fly Fishing	Independent
First Impression	98%	96%
Greeting	66%	82%
Needs Assessment	73%	74%
Sales Process	63%	64%
Product Presentation	77%	73%
Overall Impressions	82%	92%
Total Score	70%	74%

Fishing Study

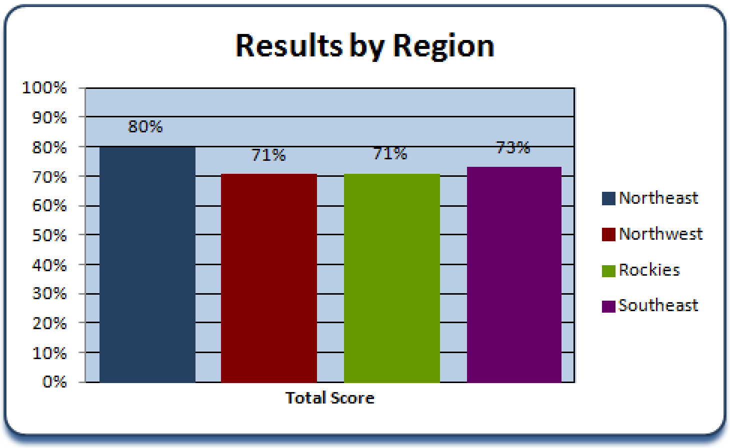


	Big Box	Family Owned	Outdoor Specialty	Sporting Goods	Combined
	90	88	89	91	358
First Impression	81%	80%	92%	91%	86%
Greeting	47%	68%	65%	66%	61%
Needs Assessment	52%	60%	62%	61%	59%
Sales Process Evaluation	54%	69%	67%	65%	64%
Product Presentation	49%	41%	60%	53%	51%
Overall Impressions	60%	80%	84%	78%	75%
Total Score	52%	63%	66%	64%	61%

Comments: In ranking the total scores of the fly fishing mystery shopping surveys by store type, it should be noted that Independents outranked Big Box stores by 4%. Overall, Independents provided a better greeting experience and left the shopper with a better overall impression. Big Box, however, scored higher on the Product Presentation.

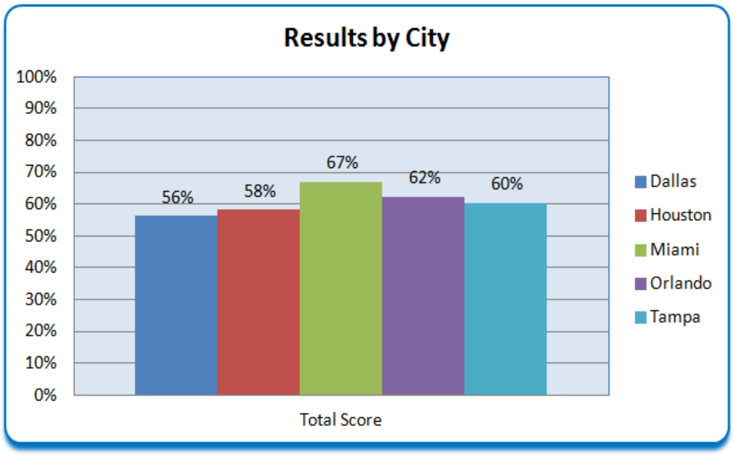
Comparative Comments: In the 2014 General Fishing study there was no particular store type that performed better than others. In this study, fly fishing was rated higher across all categories and store types.

Fly Fishing Study



	52	60	71	57
	Northeast	Northwest	Rockies	Southeast
First Impression	94%	97%	97%	96%
Greeting	85%	75%	78%	76%
Needs Assessment	80%	70%	70%	78%
Sales Process	74%	62%	59%	63%
Product Presentation	79%	72%	73%	71%
Overall Impressions	96%	86%	89%	88%
Total Score	80%	71%	71%	73%

Fishing Study



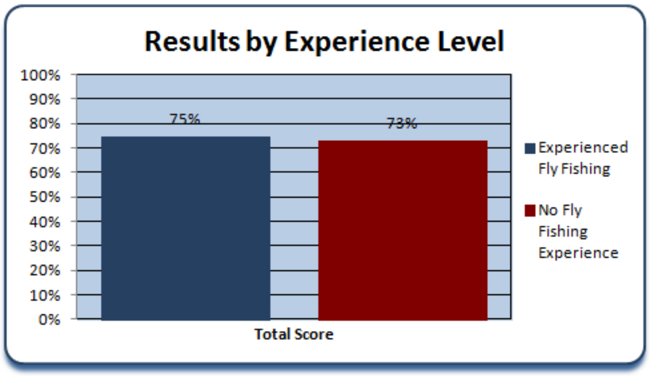
	Dallas	Houston	Miami	Orlando	Tampa	Combined
	69	60	95	61	73	358
First Impression	84%	87%	89%	79%	89%	86%
Greeting	59%	53%	68%	63%	60%	61%
Needs Assessment	48%	61%	67%	59%	55%	59%
Sales Process Evaluation	62%	60%	67%	66%	62%	64%
Product Presentation	43%	50%	54%	51%	53%	51%
Overall Impressions	71%	66%	84%	77%	76%	75%
Total Score	56%	58%	67%	62%	60%	61%

Comments: The Northeast region scored higher overall and consistently in every category with the exception of First Impression. Northwest, Rockies and Southeast were rated similarly in all areas of review. Needs assessment was rated higher in the eastern regions than the western areas.

Statistical Note: The Rockies Region was assigned a greater number of shops as requested by the organizers of this study.

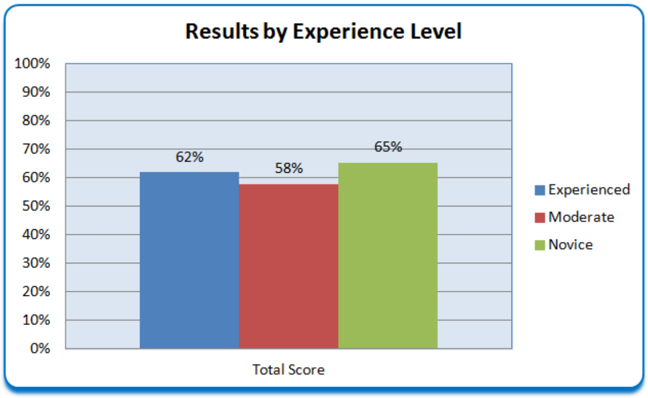
Comparative Comments: The general fishing study revealed no significant differences in experiences in any particular state. The one area of overlap in the two studies was the Southeast (Miami, Orlando and Tampa). All categories of the fly fishing shopping experiences were rated higher in that area than were the general fishing experiences.

Fly Fishing Study



	43	197
	Experienced Fly Fishing	No Fly Fishing Experience
First Impression	100%	95%
Greeting	79%	78%
Needs Assessment	75%	74%
Sales Process	65%	64%
Product Presentation	74%	74%
Overall Impressions	92%	89%
Total Score	75%	73%

Fishing Study

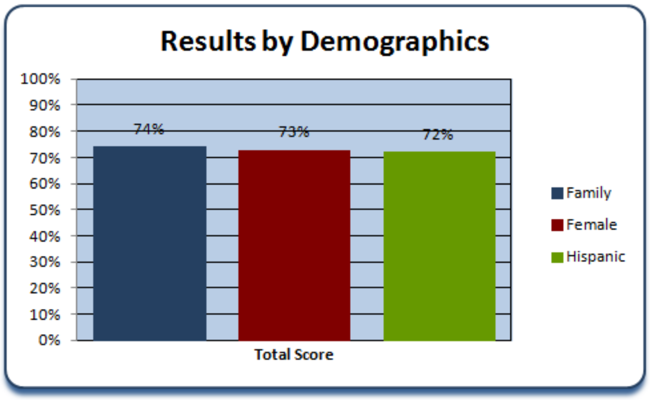


	48 Experienced	169 Moderate	141 Novice	358 Combined
First Impression	88%	82%	91%	86%
Greeting	66%	57%	64%	61%
Needs Assessment	60%	53%	65%	59%
Sales Process Evaluation	59%	59%	70%	64%
Product Presentation	54%	51%	49%	51%
Overall Impressions	74%	72%	80%	75%
Total Score	62%	58%	65%	61%

Comments: The experience level of the fly fishing mystery shopper was another area of focus for this study. As with the type of stores evaluated, and the cities shopped, there is very little differentiation in total scores. While overall impressions are strong and positive, opportunities exist in Needs Assessment, the Sales Process and in Product Presentation to improve the consumer experience regardless of their experience level.

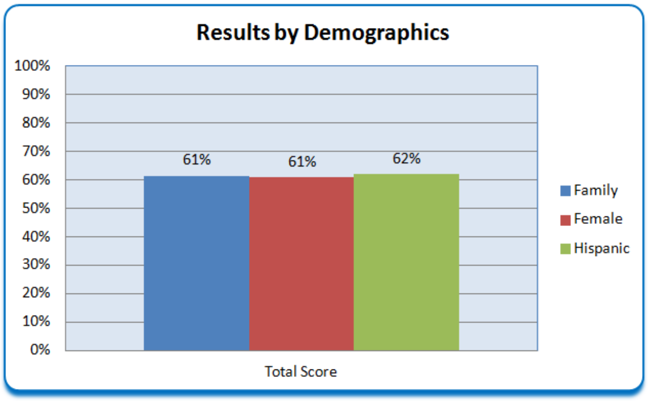
Comparative Comments: The general fishing study produced similar results when the experience level of the shopper was the focus. All levels of anglers had similar shopping experiences.

Fly Fishing Study



	99	101	40
	Family	Female	Hispanic
First Impression	99%	94%	95%
Greeting	79%	78%	76%
Needs Assessment	76%	73%	69%
Sales Process	65%	63%	64%
Product Presentation	73%	74%	76%
Overall Impressions	90%	90%	88%
Total Score	74%	73%	72%

Fishing Study



	Family (120)	Female (118)	Hispanic (120)	Combined (358)
First Impression	88%	85%	86%	86%
Greeting	61%	61%	62%	61%
Needs Assessment	56%	58%	62%	59%
Sales Process Evaluation	62%	64%	65%	64%
Product Presentation	56%	49%	47%	51%
Overall Impressions	75%	75%	77%	75%
Total Score	61%	61%	62%	61%

Comments: The three emerging markets included in this study are Hispanics, Females, and the Family. The data reveals nearly identical tracking for all three of these emerging markets in terms of their total shopping experience with significant opportunity for improvement for all three demographics.

Comparative Comments: The general fishing study's focus on the three demographics produced identical results to the fly fishing study.

The results contained in this section are a percentage recap of each of the major categories included on the mystery shopping data collection instrument that was used by all shoppers, in all cities, by all store types and experience levels.

When a category contains multiple questions, each question is broken out to report the percentage of Yes/No responses, in an effort to determine the component(s) of the category where there is the most opportunity for change and improvement.

First Impressions

Question Detail

Fly Fishing Study

	Yes	No
From your very FIRST impression of the fishing gear area or aisle, would you be interested in purchasing here? (Look at cleanliness, organization, range of equipment options, etc.)	96%	4%

Fishing Study

	Yes	No
From your very FIRST impression of the fishing gear area or aisle, would you be interested in purchasing here? (Look at cleanliness, organization, range of equipment options, etc.)	86%	14%

Comments: The first impression of stores for the fly fishing shoppers was extremely positive. The stores were cleaned and organized, with plenty of equipment available. One shopper commented on the ‘wall of flies’ that greeted her as she entered a store.

Comparative Comments: The general fishing study ranked slightly lower, although still very favorable in First Impressions. Note that the fly fishing stores shopped were all only outdoor sports oriented, where the general fishing study included stores which sold multiple types of goods.

Note that first and last impressions in the retail environment are critical and the most memorable parts of consumer shopping experiences. The first impression sets the stage for the sale and the last impression is the memory that will remain with the consumer long after the shopping experience is over since it is at this point in the transaction – the exchange of money for goods or services, that the consumer is most vulnerable.

Greeting

Question Detail

Fly Fishing Study

	Yes	No	n/a
When you first entered the area where fishing gear is sold, were employees clearly identifiable with store attire and/or name tags? (select n/a if you never interacted with a salesperson)	67%	32%	1%
Greeted by sales person within 3 minutes	72%	27%	1%
The sales person was friendly	94%	6%	-
Their opening was inviting, friendly	84%	16%	-
Made me feel at ease	83%	18%	-
Determined my level of experience	70%	30%	-

Fishing Study

	Yes	No	n/a
When you first entered the area where fishing gear is sold, were employees clearly identifiable with store attire and/or name tags? (select n/a if you never interacted with a salesperson)	65%	34%	2%
Greeted by sales person within 3 minutes	36%	63%	2%
The sales person was friendly	88%	12%	-
Their opening was inviting, friendly	67%	33%	-
Made me feel at ease	67%	33%	-
Determined my level of experience	47%	53%	-

Comments: Most fly fishing shoppers (72%) were greeted immediately upon entrance to the store or the area where fly fishing equipment was displayed by a friendly welcoming sales person. “Have you ever fly fished before” seemed to be the standard opening.

Comparative Comments: The general fishing study ranked notably lower in the timing of the initial greeting and determining the level of experience of the shopper. Staff at Independent fly fishing stores and in the fly fishing areas of the Big Box stores seemed to be involved in the sport themselves, so therefore more apt to ask questions. One shopper told us,” I felt that the salesperson was exceptionally engaged.”

Needs Assessment

Question Detail

Fly Fishing Study

	Yes	No	n/a
Did the employee ask if you (or your family members) were new to fishing or an experienced angler?	72%	26%	2%
If you told the sales person you were new to fly fishing, did the sales person ask if you have experience with conventional fishing?	50%	50%	-
If you told the sales person you were new to fishing, did the sales person ask what about fly fishing attracted you?	24%	76%	-
If you told the sales person you were new to fishing, did the sales person ask where you planned to fish?	55%	45%	-
If you told the sales person you were an experienced angler, did the sales person ask where you planned to fish?	54%	46%	-
If you told the sales person you were an experienced angler, did the sales person ask what you needed assistance with?	87%	13%	-
If you told the sales person you were an experienced angler, did the sales person ask if there was any local information they could provide	38%	62%	-

Fishing Study

	Yes	No	n/a
Did the employee ask if you (or your family members) were new to fishing or an experienced angler?	45%	54%	1%
If you told the sales person you were new to fishing, did the sales person ask if you had your license yet? *	20%	80%	-
If you told the sales person you were new to fishing, did the sales person ask where you planned to fish?	56%	44%	-
If you told the sales person you were new to fishing, did the sales person ask your familiarity with the equipment? *	26%	74%	-
If you told the sales person you were an experienced angler, did the sales person ask if you had your license yet? *	8%	92%	-
If you told the sales person you were an experienced angler, did the sales person ask where you planned to fish? *	39%	61%	-
If you told the sales person you were an experienced angler, did the sales person ask if you we looking for new equipment? *	42%	58%	-

*Calculation adjusted to account for scenario bias. This occurs when a shopper was directed to specifically inquire about license, fishing location, or new equipment. For these questions, the responses were excluded from both the positive response count and from the denominator count used to calculate the percentages.

Comments: The questions in this portion of the study were intended to determine frequency of asking if the angler had any experience and where they intended to fish. They are not a reflection of the sales associates overall ability to match need with product.

The results of the fly fishing shopping experiences show that sales people are asking shoppers about levels of experience on a fairly regular basis (72%). Whether experienced or not in fly fishing, questions about where the shopper planned to fish were asked approximately 50% of the time. Shoppers were rarely asked what attracted them to fly fishing or if local information could be provided. The commentary from the shoppers tells us that fly fisherman sales people would almost immediately begin to discuss how important it was to take classes to know if you liked the sport when talking with people who had never participated in the sport. For conversation with the experienced fly fisherman, there would be immediate engagement discussing equipment and spots to fish.

Comparative Comments: The stores shopped in the general fishing study ranked consistently lower in the needs assessment areas. The staff in those stores seemed to be less engaged with the customer than the fly fishing sales person when discussing experiences.

Sales Process Evaluation

Question Detail

Fly Fishing Study

	Yes	No	n/a
Did the sales person listen attentively to your needs?	87%	13%	-
Did the sales person treat you with respect?	93%	7%	-
Did the sales person understand what you needed or wanted to purchase?	82%	18%	-
Did the sales person show you items that matched needs?	78%	22%	-
Did the sales person show you products from various manufacturers?	54%	46%	-
Did the sales person cross promote the purchase of gear and equipment with a license purchase?	12%	88%	-
Did the sales person appear knowledgeable about the products?	85%	15%	-
Did the sales person provide education about the products?	66%	34%	-
Did the sales person allow you to handle and examine the products?	51%	49%	-
Did the sales person recommend any place for you to go fishing?	40%	60%	-
Did the sales person offer products in a wide variety of price points?	55%	45%	-

Fishing Study

	Yes	No	n/a
Did the sales person listen attentively to your needs?	87%	13%	-
Did the sales person treat you with respect?	89%	11%	-
Did the sales person understand what you needed or wanted to purchase?	82%	18%	-
Did the sales person show you items that matched needs?	80%	20%	-
Did the sales person cross promote the purchase of gear and equipment with a license purchase?	19%	81%	-
Did the sales person appear knowledgeable about the products?	76%	24%	-
Did the sales person provide education about the products?	54%	46%	-
Did the sales person allow you to handle and examine the products?	60%	40%	-
Did the sales person recommend any place for you to go fishing? *	45%	55%	-

*Calculation adjusted to account for scenario bias. This occurs when a shopper was directed to specifically inquire about license, fishing location, or new equipment. For these questions, the responses were excluded from both the positive response count and from the denominator count used to calculate the percentages.

Comments: Areas of strength in the Sales Process category include listening skills, treating the customer with respect, developing an understanding of what the customer needed and being knowledgeable about the products. Comments from the shoppers tell us that many sales people provided more of an education about the unique qualities of the sport, as opposed to informing them about the equipment, which the shoppers found valuable.

The area where there appears to be the most opportunity to improve is with regard to the cross promotion of fishing licenses when someone is discussing purchasing gear.

Another opportunity missed by some sales associates is the chance to educate the customer on places to fish.

Comparative Comments: The findings in the Sales Process category in the general fishing study were almost identical to those found in the fly fishing study, with the exception of knowledge of products. Fly fishing rated higher, but it was likely due to the fact that the sales people were more enthused about the sport. From both studies it is apparent that there seems to a lack of discussion of licenses across the industry.

Close

Question Detail

Fly Fishing Study

	Yes	No	n/a
Did the sales person invite you to purchase an item to meet the need you discussed with him/her?	43%	57%	-
Did the sales person invite you to purchase a fishing license? (if applicable)	7%	93%	-
Did the sales person offer fishing regulations?	5%	95%	-
Did the sales person reveal that license dollars go towards conserving our natural resources for future generations?	3%	97%	-
Did the sales person request contact information (email address, mailing address)?	10%	90%	
Did the sales person offer the opportunity to attend any upcoming fishing-related events/clinics that will take place or be sponsored by the retailer?	66%	34%	

Fishing Study

	Yes	No	n/a
Did the sales person invite you to purchase an item to meet the need you discussed with him/her?	59%	41%	-
Did the sales person invite you to purchase a fishing license?*	20%	80%	-
Did the sales person offer fishing regulations?	6%	94%	-
Did the sales person reveal that license dollars go towards conserving our natural resources?	1%	99%	-
Did the sales person request contact information (email address, mailing address)?	2%	98%	-
Did the sales person offer the opportunity to attend any upcoming fishing-related events/clinics that will take place or be sponsored by the retailer?	4%	96%	-

*Calculation adjusted to account for scenario bias. This occurs when a shopper was directed to specifically inquire about license, fishing location, or new equipment. For these questions, the responses were excluded from both the positive response count and from the denominator count used to calculate the percentages.

Comments: Probably the weakest area of the sales process is the close. When consumers present in a store or initiate a telephone call to express interest in a product or service, they expect to be invited to make the purchase at the conclusion of the experience. It's only natural. They have pre-qualified themselves as a prospect by initiating the transaction.

However, in the case of the fly fishing experience, what made it a bit different than a typical shopping experience was the recommendation by 66% of the sales people to the shopper to take a class before investing in equipment. While a few shoppers saw this as a negative approach to making a sale, most understood that the sales person's intent was to save the shopper money from investing in a sport that they might not like or in equipment that was not suited to them. Several shoppers signed up for classes as a result of these shops.

Comparative Comments: *The general fishing study found few sales people discussing classes or educational experiences with individuals, missing opportunities to expose new and experienced anglers to fun opportunities for learning about the sport.*

The following findings apply to both the studies of the fishing industry.

- *Retailers are missing the opportunity to develop a relationship with those who are self-selecting the sport of fishing by not asking for names, addresses, and email information to invite them back into the store for special promotions and events.*

- *Retailers are not communicating where the money goes when an angler purchases a fishing license. The environment is of importance to the millennial generation and may be the one factor that convinces them to purchase a license or get involved with the sport.*

- *Retailers are not communicating the regulations of the industry to consumers to ensure they have good experiences outside of the retail environment and continue to enjoy the sport.*

Product Presentation
Question Detail

Fly Fishing Study

	Yes	No	n/a
Were the sections in the big box stores (Cabela's or Bass Pro) clearly marked so that you could find the appropriate area for your needs?	97%	3%	-
Was gear/equipment presented by type of fishing conditions (fresh/salt, cold/tropical)?	60%	40%	-
Was gear/equipment presented with bi-lingual packaging?	7%	93%	-
Were the flies easily accessible?	93%	8%	-
Was the fly area well lit?	92%	8%	-
Did you feel comfortable shopping in this section of this store?	93%	8%	

Fishing Study

	Yes	No	n/a
Were the sections in this store clearly marked so that you could find the appropriate area for your needs?	87%	13%	-
Was gear/equipment presented to distinguish between the beginner and intermediate fishing audiences?	35%	65%	-
Was gear/equipment presented to identify children's gear and family oriented equipment?	52%	48%	-
Was gear/equipment presented with packaging displaying the skill set of the intended purchaser (shows beginner, experienced, etc.?)	27%	73%	-
Was gear/equipment presented by type of fishing/conditions (fresh water v salt water; fly fishing, etc.?)	63%	37%	-
Was gear/equipment presented with bi-lingual packaging?	9%	91%	-
Did you feel comfortable shopping in this section of this store?	81%	19%	-

Comments: Stores included in this study did well in terms of clear and visible signage directing customers to the area of the store where they might find fly fishing equipment and products. The products that are specific to this sport were easily accessible and in well-lit areas. Most importantly, for a sport that is specialized as is fly fishing, the majority of shoppers felt comfortable in these areas of the stores.

Only 7% of the shoppers saw bi-lingual packaging offering opportunity for change if the growing Hispanic market is of interest to the industry.

Comparative Comments: *The general fishing study found signage to be the strongest aspect of Product Presentation. Areas sited as opportunities included bi-lingual packaging (9%) and skill level indicators.*

Overall Impressions
Question Detail

Fly Fishing Study

	Yes	No	n/a
Did you feel welcomed, valued and informed as a customer in this store?	86%	14%	-
Would you be inclined to make a fishing related purchase from this store?	90%	10%	-
Would you recommend this store to friends and family for their fishing needs?	93%	7%	-

Fishing Study

	Yes	No	n/a
Did you feel welcomed, valued and informed as a customer in this store?	71%	29%	-
Would you be inclined to make a fishing related purchase from this store?	78%	22%	-
Would you recommend this store to friends and family for their fishing needs?	77%	23%	-

Comments: A strong majority of customers felt valued and would recommend the stores where they shopped to friends and family. The percentage of respondents answering "Yes" to the questions in this category may have done so because they felt valued, listened to, and understood, as evidenced in the Sales Process Evaluation category.

Comparative Comments: In last year's study, we stated, "It should be noted however that "Yes" response ranges from 70% – 79% fall into the mediocre experience classification. The American public has come to expect mediocrity as the norm in their shopping experiences but as an industry, the question must be asked if this is what the industry wants and expects out of its manufacturing, distribution, and support channels. The study of the fly fishing stores shows that a higher level of shopper experience satisfaction can be achieved.

This section of the analysis deals with the key questions AFFTA and RBFF wanted answered by this study. Some of the answers to the key inquiries are an analysis of a combination of questions from the mystery shopping survey instrument.

Key Inquiries

Educating the Customer

Fly Fishing Study

Did the sales person provide education about the products?	Yes	No	n/a
Overall	66%	34%	
Big Box Store	75%	25%	
Independent Store	62%	38%	
Hispanic	58%	42%	
Female	64%	36%	
Family	71%	29%	

Fishing Study

Did the sales person provide education about the products?	Yes	No	n/a
Overall	54%	46%	-
Big Box Store	36%	64%	-
Sporting Goods Store	54%	46%	
Outdoor Specialty	62%	38%	-
Family Owned	66%	34%	-
Hispanic	53%	47%	-
Female	55%	45%	
Family	54%	46%	

Comments: Education about the products is happening two thirds of the time in the fly fishing industry, and then, more often in the Big Box store than the Independents. That being said, shoppers may have marked this question ‘no’ when the sales person in the independent store shared more about classes and making sure the sport was right for the individual, as opposed to educating about actual product.

There is a bit of a discrepancy between who product knowledge is shared with; families are 71% of the time and Hispanics only 58%.

Comparative Comments: By store type and by growth segment, demographic, education during the general fishing study happened only about half of the time as compared to 66% overall in the fly fishing industry.

The fishing industry is dynamic in that there are always new products, regulations, environmental impacts, etc. that can be communicated to the consumer to help them become engaged in and enjoy the sport of fishing. Retailers are missing out on opportunities to teach and inform their customer, practices which could result in consumers purchasing more items or to buy at higher price points.

Product Suggestion

Fly Fishing Study

Did the sales person show you items that matched those needs?	Yes	No	n/a
Overall	78%	22%	
Big Box Store	85%	15%	
Independent Store	75%	25%	
Hispanic	68%	32%	
Female	78%	12%	
Family	82%	18%	

Fishing Study

Did the sales person show you items that matched those needs?	Yes	No	n/a
Overall	80%	20%	-
Big Box Store	64%	36%	-
Sporting Goods Store	84%	16%	
Outdoor Specialty	88%	12%	-
Family Owned	84%	16%	-
Hispanic	83%	18%	-
Female	80%	20%	
Family	78%	22%	

Fly Fishing Study

Did the sales person cross promote the purchase of gear and equipment with a license purchase?	Yes	No	n/a
Overall	12%	88%	
Big Box Store	22%	78%	
Independent Store	9%	91%	
Hispanic	12%	88%	
Female	9%	91%	
Family	15%	85%	

Fishing Study

Did the sales person cross promote the purchase of gear and equipment with a license purchase?	Yes	No	n/a
Overall	19%	81%	-
Big Box Store	24%	76%	-
Sporting Goods Store	18%	82%	
Outdoor Specialty	19%	81%	-
Family Owned	15%	85%	-
Hispanic	22%	78%	-
Female	18%	82%	
Family	18%	82%	

Comments: Fly fishing sales associates did not score high when asked if they showed items to match the clients' needs. But as stated before, many of the associates stressed the need to take a class before choosing equipment, so the person who was looking to be shown an item, rather than take a suggestion, may have marked this no. Several Hispanic respondents felt that the pushing of a 'clinic' or 'class' was a way to make extra money. There is a need for a better line of communication with this demographic.

Comparative Comments: In the general fishing study, sales associates did a fairly good job of matching products with the needs of the customer but missed the opportunity to cross promote licenses and gear. There was not the same discrepancy between demographics in the general study as was found in the fly fishing study.

Product Demonstration

Fly Fishing Study

Did the sales person allow you to handle and examine the products?	Yes	No	n/a
Overall	51%	49%	
Big Box Store	50%	50%	
Independent Store	52%	48%	
Hispanic	45%	55%	
Female	56%	44%	
Family	48%	52%	

Fishing Study

Did the sales person allow you to handle and examine the products?	Yes	No	n/a
Overall	60%	40%	-
Big Box Store	47%	53%	-
Sporting Goods Store	63%	37%	
Outdoor Specialty	63%	37%	-
Family Owned	68%	32%	-
Hispanic	66%	34%	-
Female	58%	42%	
Family	56%	44%	

Fly Fishing Study

Was gear/equipment presented by type of fishing/conditions (fresh water vs. salt water; fly fishing, etc.)?	Yes	No	n/a
Overall	60%	40%	
Big Box Store	52%	48%	
Independent Store	62%	38%	
Hispanic	63%	37%	
Female	56%	44%	
Family	62%	38%	

Fishing Study

Was gear/equipment presented by type of fishing/conditions (fresh water vs. salt water; fly fishing, etc.)?	Yes	No	n/a
Overall	63%	37%	-
Big Box Store	43%	57%	-
Sporting Goods Store	67%	33%	
Outdoor Specialty	87%	13%	-
Family Owned	54%	46%	-
Hispanic	56%	44%	-
Female	58%	42%	
Family	74%	26%	

Fly Fishing Study

Was gear/equipment presented with bi-lingual packaging?	Yes	No	n/a
Overall	7%	93%	
Big Box Store	7%	93%	
Sporting Goods Store	7%	93%	
Hispanic	7.5%	92.5%	
Female	4%	96%	
Family	9%	91%	

Fishing Study

Was gear/equipment presented with bi-lingual packaging?	Yes	No	n/a
Overall	9%	91%	-
Big Box Store	11%	89%	-
Sporting Goods Store	8%	92%	
Outdoor Specialty	8%	92%	-
Family Owned	8%	92%	-
Hispanic	13%	87%	-
Female	8%	92%	
Family	6%	94%	

Comment: There are three individual questions in the fly fishing survey instrument that are related to the key inquiry of Product Demonstration. One was about handling and examining the products; the other how products were displayed according to type of fishing, and the third about presentation of equipment with bi-lingual packaging.

Shoppers told us they were only allowed to examine or handle a product about 50% of the time, consistently between Big Box and Independent stores. Females were most often allowed to interact with product, then family, then Hispanics.

Presenting equipment by type of fishing (fresh vs. salt water, fly fishing, etc.) was shown as being done 60% of the time, more notably in the Independent Stores.

The lowest rating was regarding bi-lingual packaging (9%). Being able to help a customer better understand a product and its use by pointing out bi-lingual information on the package may facilitate the sale, especially with the emerging Hispanic market. It may also give manufacturers, hoping to attract this emerging market, who package using the bi-lingual standard, an advantage over competitors.

Comparative Comments: In the general fishing study, shoppers were allowed to interact with products on 60% vs 50%. This difference could be because of the variety of stores that were shopped in that study or because of the fly fishing sales associates desire to educate the consumer through classes before discussing equipment. Bi-lingual packaging was the lowest score in both studies.

New Angler Where to Fish Inquiry

Fly Fishing Study

If you told the sales person you were new to fishing, did the sales person ask where you planned to fish?	Yes	No	n/a
Overall	55%	45%	
Big Box Store	58%	42%	
Independent Store	54%	46%	
Hispanic	55%	45%	
Female	61%	39%	
Family	52%	48%	

Fishing Study

If you told the sales person you were new to fishing, did the sales person ask where you planned to fish?	Yes	No	n/a
Overall	56%	44%	-
Big Box Store	37%	63%	-
Sporting Goods Store	64%	36%	
Outdoor Specialty	60%	40%	-
Family Owned	62%	38%	-
Hispanic	62%	38%	-
Female	55%	45%	
Family	48%	52%	

Comments: New fly fishing anglers were only asked a little over 50% of the time where they planned to fish with little difference between Big Box and Independent stores. Interestingly, the female demographic was asked the question more often in this study.

Comparative Comments: Overall responses to this question were similar from study to study, notable exception being that the question was asked more often in the general fishing study. The likely explanation is that the sales person needed to understand if it would be lake or ocean fishing to begin to determine what type of equipment would be needed. In the general fishing study, Hispanics were asked this question most often.

Experienced Angler Where to Fish Inquiry

Fly Fishing Study

If you told the sales person you were an experienced angler, did the sales person ask where you planned to fish?	Yes	No	n/a
Overall	54%	46%	-
Big Box Store	56%	44%	-
Independent Store	55%	45%	
Hispanic	45%	55%	-
Female	59%	41%	
Family	60%	40%	

Fishing Study

If you told the sales person you were an experienced angler, did the sales person ask where you planned to fish? *	Yes	No	n/a
Overall	39%	61%	-
Big Box Store	20%	80%	-
Sporting Goods Store	39%	61%	
Outdoor Specialty	41%	59%	-
Family Owned	40%	60%	-
Hispanic	15%	85%	-
Female	14%	86%	
Family	49%	51%	

*Calculation adjusted to account for scenario bias. This occurs when a shopper was directed to specifically inquire about license, fishing location, or new equipment. For these questions, the responses were excluded from both the positive response count and from the denominator count used to calculate the percentages.

Comments: Experienced Anglers include those who fished a few times and were classified as “moderately” experienced, as well as those who considered themselves experienced anglers. Responses were fairly similar across the types of stores, with just over 50% of the experienced anglers being asked this question, and consistent with the New Angler responses. Differences came with more families and fewer Hispanics being asked the question when they told the sales person they were experienced.

Comparative Comments: This question was asked significantly more often in the fly fishing study of experienced anglers than it was in the general fishing study. From these results it appears that fly fishing sales people will ask more questions to get to know the needs of the shopper.

License Inquiry

Fly Fishing Study

Did the sales person invite you to purchase a fishing license?*	Yes	No	n/a
Overall	7%	93%	-
Big Box Store	13%	87%	-
Independent Store	5%	95%	
Hispanic	8%	92%	-
Female	5%	95%	
Family	9%	91%	

*The question dealing with the invitation to purchase a license was worded and categorized differently in the fly fishing study. This simplification was intentional to clarify for the shopper, the exact focus of the question.

Fishing Study

If you told the sales person you were new to fishing, did the sales person ask if you had your license yet?	Yes	No	n/a
Overall	20%	80%	-
Big Box Store	27%	73%	-
Sporting Goods Store	16%	88%	
Outdoor Specialty	16%	84%	-
Family Owned	13%	87%	-
Hispanic	22%	78%	-
Female	18%	82%	
Family	10%	90%	

If you told the sales person you were an experienced angler, did the sales person ask if you had your license yet?	Yes	No	n/a
Overall	8%	92%	-
Big Box Store	14%	86%	-
Sporting Goods Store	5%	95%	
Outdoor Specialty	5%	95%	-
Family Owned	2%	98%	-
Hispanic	0%	100%	-
Female	3%	97%	
Family	13%	87%	

Comments: Mystery shoppers overall were invited 7% of the time to purchase a license. This statistic makes sense based on the way many of the independent specialty stores structure their sales presentations. They ask about experience, discover that the customer is new to fly fishing, then they recommend classes which do not require you to have a license.

Comparative Comments: The question dealing with the invitation to purchase a license was worded and categorized differently in the general fishing study and is not an exact comparison to the fly fishing study where the question was simplified for the data collection and reporting process.

Overall Shopper Experience

Fly Fishing Study

Did you feel comfortable shopping in this section of this store?	Yes	No
Overall	93%	7%
Big Box Store	91%	9%
Independent Store	93%	7%
Hispanic	88%	12%
Female	93%	7%
Family	94%	6%

Fishing Study

Did you feel comfortable shopping in this section of this store?	Yes	No
Overall	81%	19%
Big Box Store	77%	23%
Sporting Goods Store	84%	16%
Outdoor Specialty	84%	16%
Family Owned	78%	22%
Hispanic	81%	19%
Female	79%	21%
Family	83%	17%

Fly Fishing Study

Did you feel welcomed, valued and informed as a customer in this store?	Yes	No
Overall	86%	14%
Big Box Store	87%	13%
Independent Store	85%	15%
Hispanic	88%	12%
Female	84%	16%
Family	87%	13%

Fishing Study

Did you feel welcomed, valued and informed as a customer in this store?	Yes	No
Overall	71%	29%
Big Box Store	53%	47%
Sporting Goods Store	75%	25%
Outdoor Specialty	79%	21%
Family Owned	78%	22%
Hispanic	73%	17%
Female	72%	18%
Family	69%	31%

Comments: An overwhelming 93% of the shoppers felt comfortable shopping in either the Big Box fly fishing areas or the Independent fly fishing stores. Even where product demos and product education may have fallen short, the shopper's interactions with the individuals who sell fly fishing equipment left them with a very positive feeling about the store and experience.

Comparative Comments: Overall performance in this key area of focus was good in the general fishing study, but opportunity for improvement exists, as exhibited by the scores in the fly fishing study. Part of the difference could be the self-serve nature of the types of Big Box stores that were included in the general fishing study.

IV. GENERAL OBSERVATIONS

STRENGTHS in the Fly Fishing Industry:

- Employees who are passionate about the sport – especially evident in the independent specialty stores,
- Availability of the staff – especially evident in the independent specialty stores,
- General sense, on the part of the consumer, that staff in both types of stores are involved in the sport,
- Creating community
- Listening skills,
- Creating respectful interactions,
- Product knowledge,
- Understanding the sport as it relates to the needs of the experienced and beginning fly fishing angler,
- Availability of classes and events intended to educate the consumer prior to the purchase of and investment in equipment,

OPPORTUNITIES in the Fly Fishing Industry:

- Better assessment of the experience level of the angler. Drilling down into the experience level of the consumer is important to make proper product, class, location suggestions. Spending more time finding out if the consumer ever fished before, where, what kind of experience they had, what they liked about it, what they didn’t like about it, what kinds of things they’ve heard about fly fishing are all good questions to include in a sales workshop,
- When possible, create an awareness of the wide range of manufacturers and price points. Some retailers took the approach of making this a more narrow discussion, perhaps to support the products they carry,
- Create more opportunities for consumers to handle the gear,
- Find more opportunities to sell licenses and educate consumers on where the dollars are spent – consider packaging a free class with the purchase of gear and a license,
- Create a system for collecting customer demographic information for future contact,
- Consider bi-lingual packaging if attracting the Hispanic market is of interest,
- Develop a strong line of communication with the Hispanic market regarding why the industry suggests taking classes first and buying gear later. This has the potential to be perceived, by some in this market, as a way to make more money in an already expensive sport.