

Fishing & Boating Marketing Segmentation Study

Final Report
October 2019



BACKGROUND & RESEARCH DESIGN

background

The Recreational Boating & Fishing Foundation (RBFF) is an independent, not-for-profit organization with a mission to increase participation in recreational fishing and boating as part of an effort to ensure public awareness and appreciation of the nation's aquatic resources and the need to protect, conserve and restore these resources.

Participation in recreational fishing and boating is changing, and in some cases declining. Projections of demographic trends indicating that in the next 25 years, significant population growth will only be occurring among groups who have not traditionally been as involved with fishing & boating.

RBFF's challenge is to maintain and increase participation among those groups where fishing and boating have always played an important role in their cultural heritage, while diversifying to include a wider representation—building new traditions for all in the 21st century.



objectives

A targeted segmentation was executed to gain a comprehensive framework of recreational boaters and fishers/anglers in the United States.

What are the socio-demographic profiles of participants and what life-stage factors are there that impact participation?

1

3

What opportunities exist and the potential within these to increase participation? And conversely, what are the barriers that exist, if any, by segment?

What are the motivations to recreational fishing and boating among current participants and how do they differ?

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What are the motivators, messages, media consumption and other targeting patterns by segment?

The research was designed to ultimately identify fact-based, actionable strategies and recommendations to maximize the return on RBFF's marketing investments.

people based segmentation approach



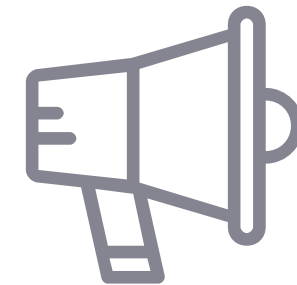
quantitative research

Develop a quantitative survey that probes into drivers, needs, category behaviors, and attitudes to analytically derive the optimal segmentation solutions.



analytics & segmentation

Using advanced analytic techniques to arrive at several consumer-based segmentation options, then workshopping with the RBFF Team to select the most actionable and relevant solution.



strategy development & prioritization

Assess and prioritize opportunity areas for focus. After opportunities are prioritized, develop winning strategies and actions to drive growth with the RBFF team.

sample & methodology

who

N=3016
Adults ages 18-54
50% Female/50% Male
Very, Somewhat or Slightly Interested in
Fishing or Boating

N=513 Acculturated Hispanics

N=700 Millennial Families
Adults ages 18-34 with at least one child
under 18

N=701 boaters
Boat 2-4 times a year or more

N=988 anglers
Fish 2-4 times a year or more



what

Online 25 minute survey.



when

Fielding took place during April 8-18, 2019.

creating the segments

People: Consumer Based Motivations

A cluster analysis was used to develop consumer segments based on attitudes, category behaviors and demographics. The segments were defined based on the following:

Attitudes: A2. Motivators for Outdoor Activities; A3. Motivators for Fishing & Boating

Category Behaviors: S1. Activity Participation, S1a Frequency and S3 Interest

Demographics: Age, Gender, Presence of Kids, Income, Race, Millennial families*

*Millennial families defined by respondents ages 18-34 that have at least one child



Executive Summary



executive summary

before we can understand the diversity of anglers & boaters, we need to understand what the market looks like today and how they fit in.

who

There is a large opportunity to grow new fishing & boating participants among those with interest but who don't yet participate (100MM Potential boaters, 88MM Potential Anglers)

Anglers & boaters reflect the overall population demographically, which is why it is so important to define motivational segments to provide targeting and implications for how to message.

Hispanics, while a key group of interest to RBFF, are less likely to be current anglers or boaters, relative to their size in the US. (13% Anglers/13% boaters vs. 17% Total Rep).

where/how

Boating – skews to lakes and distances closer to home (<2 hrs.). Boating is more seasonal in participation. When not using, boats are most commonly stored on the owner's property.

Fishing – skews to lakes, ponds, rivers, streams, with distances close to home. Fishing is typically done more from land. Fishing is a mix of year-round and seasonal participation.

Both fishing & boating have strong future participation intent.

Most buy and choose fishing products themselves vs. relying on someone else. This is most often done at mass (Walmart, primarily) and outdoor specialty stores.

what/why

Anglers & boaters are active in general, participating in a lot of outdoor activities and keeping physically fit.

They are active on social media (Facebook and Instagram are most common; Instagram is growing in frequency).

Fishing with a rod/line is most common fishing type, primarily for leisure, with half catch/releasing and half keeping to eat.

Boating – among boaters, about 4 in 10 own their own boat, with motor boats being most common, followed by sport fishing boats. Boat activities are primarily to 'ride around' and secondarily to fish.

Anglers & boaters generally feel prepared to boat/fish at a moment's notice. The key barrier to boating and fishing is preference for another outdoor activity (either the participant or others they are with). These other types of activities include things like hiking, camping or going to the beach.

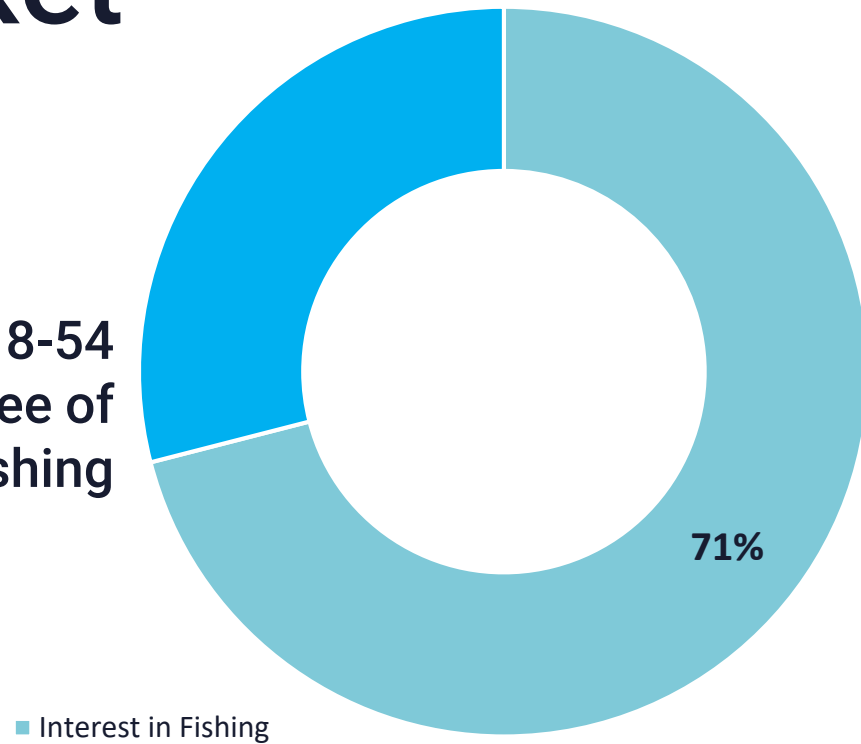
Motivations for fishing & boating are varied with the strongest being:

- Enjoying the outdoors
- Relaxation/De-stress
- Taking a break from routine/recharge
- Bonding (family and friends)

sizing the market

While a majority of US adults express at least some level of interest in fishing & boating, far fewer are actually participating, leaving a lot of opportunity to grow new participants.

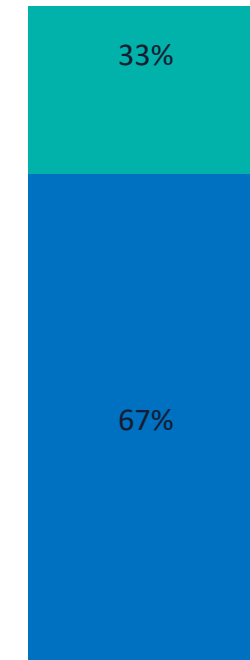
71% of US adults age 18-54 have some degree of interest* in fishing



Of those with interest...



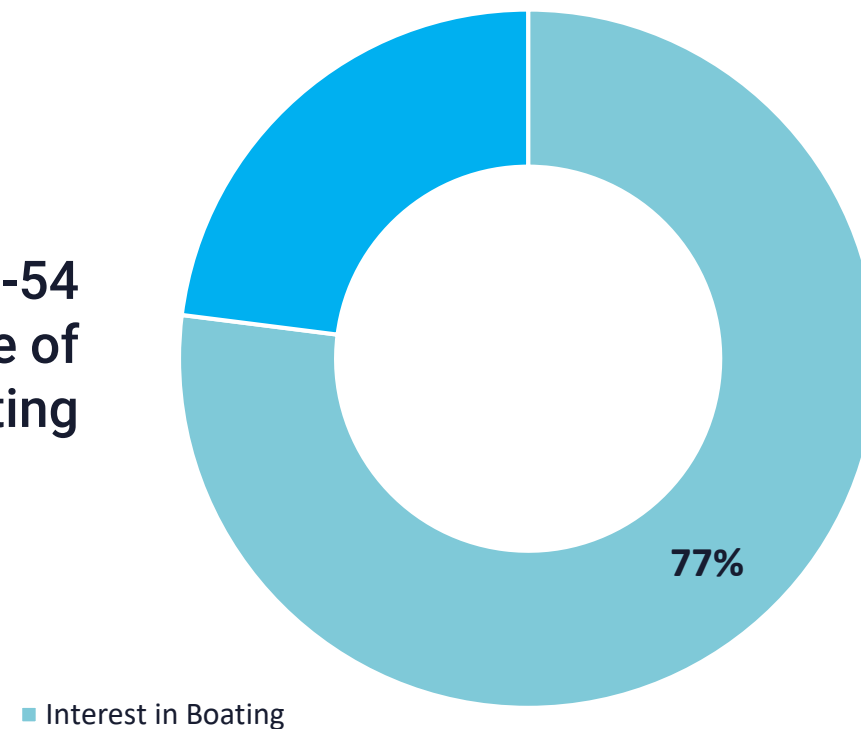
This translates to 113MM US adults^



Fishing

This translates to 37MM US adults age 18-54 who are anglers and 76MM who are not current anglers

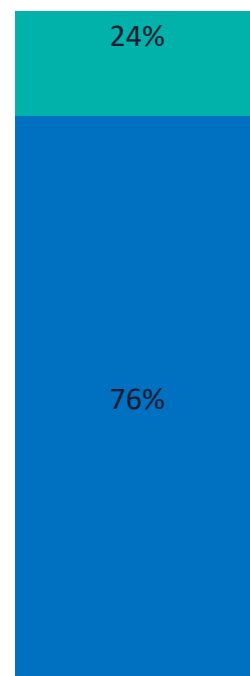
77% of US adults age 18-54 have some degree of interest* in boating



Of those with interest...



This translates to 122MM US adults^



Boating

This translates to 29MM US adults age 18-54 who are boaters and 93MM who are not current boaters



The Growth Opportunity

*Very/somewhat/slightly interested

** Defined as participating 2 or more times per year

^ Based on population estimate of adults age 18-54 to be 159MM.

executive summary

When we segment those interested in fishing & boating, six (6) distinct customer segments are identified.

What consumer segments exist within the market?

AVID ADVENTURISTS



12%

Outdoor Enthusiasts – participate in activities to fuel their need for excitement and adventure. Very much enjoy both fishing and boating (and often combine the two) and like to try new types.

ACTIVE SOCIAL FAMILIES



19%

Enjoy the outdoors and being active with friends and family. Get a variety of benefits from outdoor activities from fun/excitement to family bonding to relaxation. An important benefit of any outdoor activity is to post it as part of building their personal 'brand'.

FAMILY-FOCUSED RELAXERS



16%

Enjoy the outdoors and family time but do so by participating in more relaxed, laid-back activities (e.g. picnicking, parks, beach). Benefits received are about spending time with family (they don't need to catch a fish to have fun).

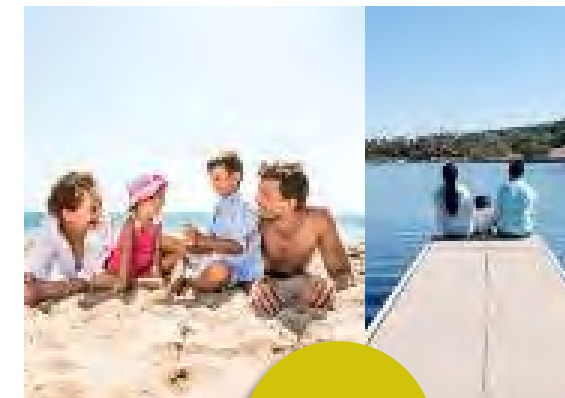
LEISURE-TIME ENJOYERS



22%

Aren't particularly fond of the outdoors, and when they do go outside, they like to take it easy – going to a beach or lake or visiting a park. Less likely to be interested in fishing or boating. A variety of strong barriers keep them from fishing.

LUKEWARM OCCASIONALISTS



16%

Have average or below average interest in many outdoor activities. While average interest in fishing and boating, they aren't self-motivated – tend to fish or boat more so when invited by a friend or family member.

UNCOMMITTEDS



15%

Least interested in outdoor activities and least interested in fishing and boating. Least likely to get enjoyment out of fishing and boating.

people segments

Size of Growth Prize (Current Anglers & Boaters and Potential to Grow New Anglers & boaters)

LOW PRIORITY SEGMENT
LOW INTEREST

UNCOMMITTEDS

1.9 MM Anglers, 1.1 MM Boaters
15.1 MM Potential New Anglers (+6.7MM kids)
17.2 MM Potential New Boaters (+7.6MM kids)

LOW PRIORITY SEGMENT
LOW INTEREST

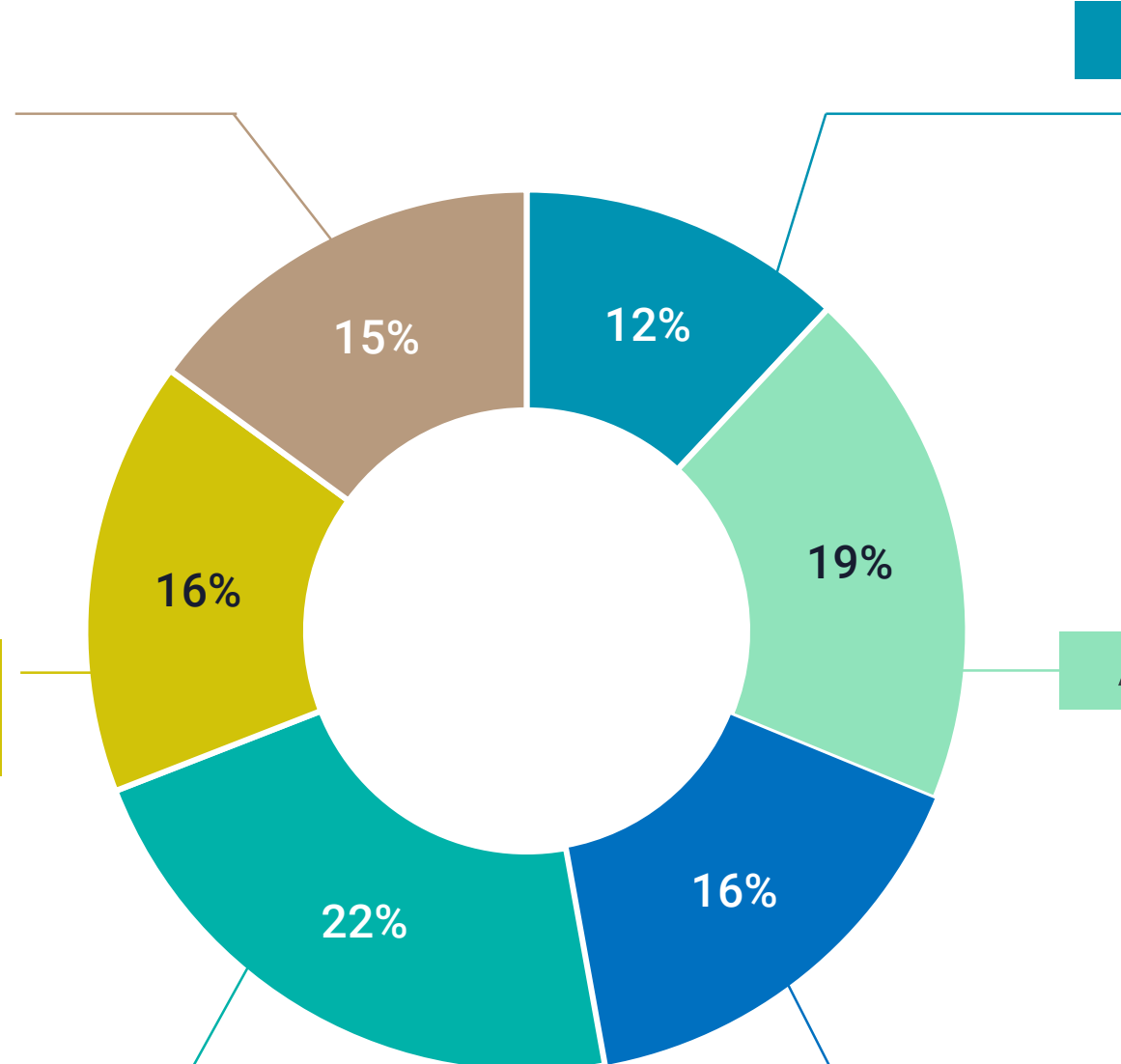
LUKEWARM OCCASIONALISTS

5.8 MM Anglers, 4.1 MM Boaters
12.3 MM Potential New Anglers (+8.4MM kids)
15.4 MM Potential New Boaters (+10.5MM kids)

LOW PRIORITY SEGMENT
LOW INTEREST

LEISURE-TIME ENJOYERS

5.2 MM Anglers, 4.0 MM Boaters
19.6 MM Potential New Anglers (+11.5MM kids)
22.8 MM Potential New Boaters (+13.4MM kids)



AVID ADVENTURISTS SECONDARY PRIORITY SEGMENT
HIGH INTEREST

8.8 MM Anglers, 7.7 MM Boaters
4.7 MM Potential New Anglers (+3.0MM kids)
6.8 MM Potential New Boaters (+4.4MM kids)

ACTIVE SOCIAL FAMILIES HIGH PRIORITY SEGMENT
HIGH INTEREST

8.8 MM Anglers, 6.9 MM Boaters
12.7 MM Potential New Anglers (+9.6MM kids)
16.2 MM Potential New Boaters (+12.3MM kids)

FAMILY-FOCUSED RELAXERS SECONDARY PRIORITY SEGMENT
HIGH INTEREST

7.2 MM Anglers, 5.5 MM Boaters
10.8 MM Potential New Anglers (+8.4MM kids)
14.1MM Potential New Boaters (+10.9MM kids)

Ipsos analysis. Based on estimated 113MM /122MM US adults age 18-54 who are slightly/somewhat/very interested in fishing/boating. Analysis then factors into account the size of the segment and the % of segment who are current anglers/boaters vs. Not anglers/boaters. Kid estimates based on assuming kids in HH of potential anglers/boaters are also potential anglers/boaters.

people segments

AVID ADVENTURISTS



12%

ACTIVE SOCIAL FAMILIES



19%

FAMILY-FOCUSED RELAXERS



16%

LEISURE-TIME ENJOYERS



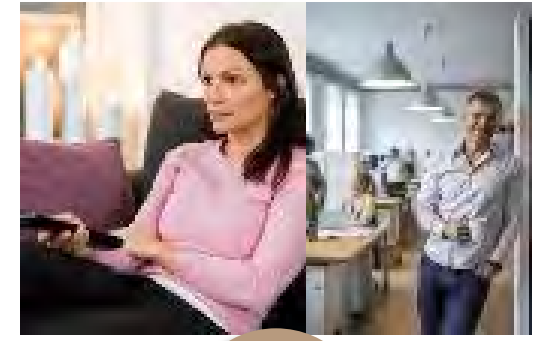
22%

LUKEWARM OCCASIONALISTS



16%

UNCOMMITTEDS



15%

More likely to be:

Age Skew

No Skew

Young (18-34)

Older (45-54)

Older (45-54)

Young (18-34)

Older (45-54)

Mean HH Income

\$73,200

\$79,300

\$75,000

\$77,400

\$75,100

\$65,500

Kids in HH

49%

59%

53%

44%

53%

33%

Gender

No Skew

Male

Female

Female

Male

No Skew

Married

52%

60%

57%

53%

52%

44%

Higher Education (Bachelors Degree+)

39%

52%

42%

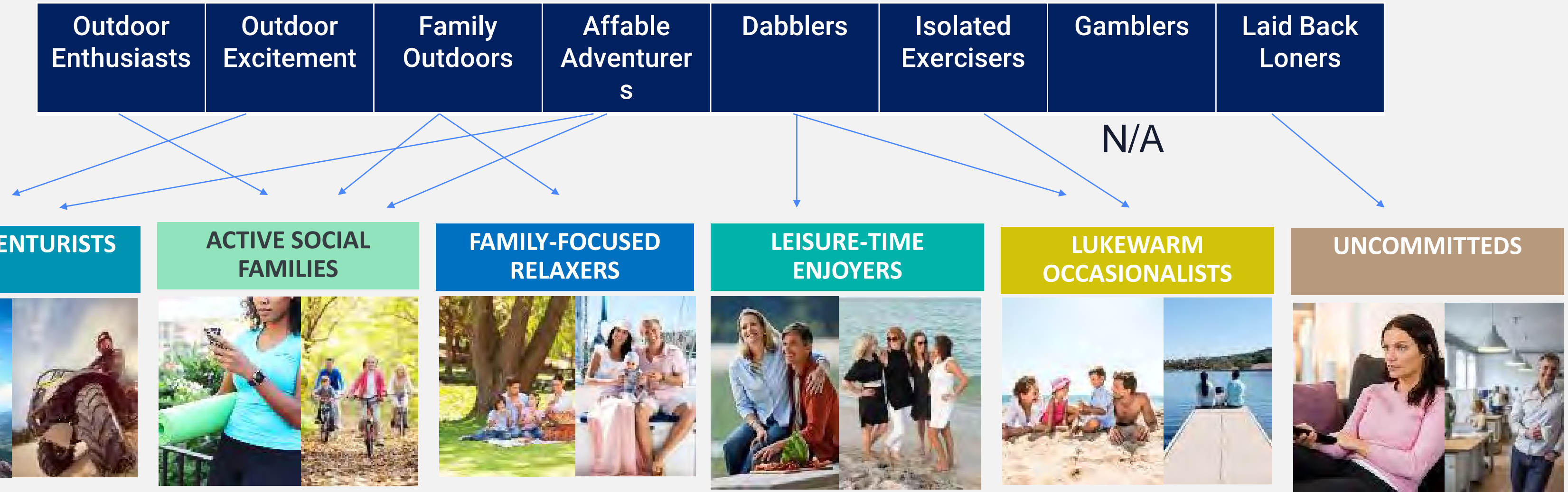
48%

52%

40%

previous research

While segmenting inputs were different between the previous segmentation and the current one, there are some similarities that can be used to hypothesize where previous segments might 'live' in the new segmentation:



people segments

Among the 6 segments, **active social families** offer an attractive marketing target while **avid adventurers** and **family-focused relaxers** are strong secondary targets.

What segments should we target?



Interest and Enjoyment of Fishing/Boating
Have Desirable Fishing/Boating Behaviors and Represent Attractive Potential
Have Desirable Attitudes Relative to Fishing/Boating
Size of the Growth Prize
Challenges/Opportunities

	AVID ADVENTURISTS	ACTIVE SOCIAL FAMILIES	FAMILY-FOCUSED RELAXERS	LEISURE-TIME ENJOYERS	LUKEWARM OCCASIONALISTS	UNCOMMITTEDS
	✓	✓	✓	✗	✗	✗
	✓	✓	✓	✗	⚡	✗
	✓	✓	✓	✗	✗	✗
5.5 MM Potential New anglers	14.8 MM Potential New anglers	12.7 MM Potential New anglers	22.9 MM Potential New anglers	14.4 MM Potential New anglers	17.6 MM Potential New anglers	
7.4 MM Potential New boaters	17.6 MM Potential New boaters	15.2 MM Potential New boaters	24.7 MM Potential New boaters	16.7 MM Potential New Boater	18.6 MM Potential New boaters	
Strong enjoyment of fishing/boating to fuel adventure needs but competing with a variety of sports for share of time. Opportunity to grow alternative fishing types (ice, fly)	Strong interest in and enjoyment of fishing and boating – lots of benefits received from participating allows for marketing potential and large group of potential participants with like motivations	Some interest in fishing boating for leisure/relaxation makes this group strong secondary target	Lack strong desire to fish/boat – prefer other outdoor activities	Occasional participants, but lack self-motivation to fish/boat - rely on invitation of others	Lack motivation and interest in fishing or boating	

recommendations

specific steps to attract these segments



<h3>Motivations to Leverage</h3>	<p>Enjoying the outdoors while being active Making memories with friends and family Building their personal 'brand' via photo ops Teaching/letting kids experience a new activity</p>	<p>The desire to seek adventure and thrills Interest in trying something new or boating/fishing somewhere new Appeal to the Outdoor Enthusiast in them</p>	<p>Having a fun and relaxing way to enjoy the outdoors Great way to relieve stress, get away from the routine and enjoy the scenery Teaching children good values</p>
<h3>Growth Opportunity</h3>	<p>This segment provides a large opportunity to grow new fishing/boating participants. Leverage key motivations (above) and appeal to interest in trying new things/doing it for the "Insta". With this group, opportunity to extend the fishing activity/memories/photo ops to meal time (strong 'keep to eat' with this segment).</p>	<p>Opportunity to target this group by highlighting new types of fishing/boating for them to try (e.g. the thrill of ice fishing, e.g. take an adventure sport fishing in a powerboat)</p>	<p>Opportunity to try to grow new participants by focusing on fishing and boating as a relaxation activity and chance to get away from one's usual routine. Consider partnering with other favorite activities (e.g. picnicking and fishing for a day out) . This segment may require more help and education to get them started.</p>
<h3>How to Reach Them</h3>	<ul style="list-style-type: none"> • Social media – Instagram, Snapchat, Twitter, Facebook • Online videos (YouTube) • Skews to men and ethnic minorities (Hispanic, Asian, Black) 	<ul style="list-style-type: none"> • Facebook/Instagram • Online videos (YouTube) • Online newspapers and current events • Printed newspapers • Printed magazines • Broadcast radio 	<ul style="list-style-type: none"> • Pinterest, Facebook • Online newspapers, Online videos (YouTube) • Online news websites for current events and entertainment news • Skews to women

recommendations barriers

Across each target segment, it is important to help participants find easy access to fishing licenses.

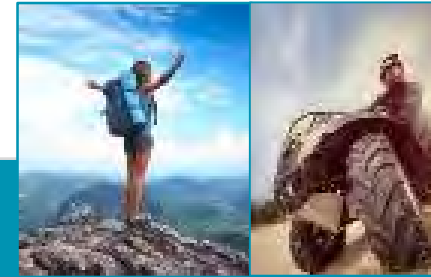
Primary Target



ACTIVE SOCIAL FAMILIES

Help Active Social Families realize that fishing is accessible and fun even without a boat
 Communicate that fishing can be a quick activity to minimize hesitations related to “not enough time”
 Utilize benefit messaging to build preference for fishing/boating as preferred outdoor activities

Secondary Target



AVID ADVENTURISTS

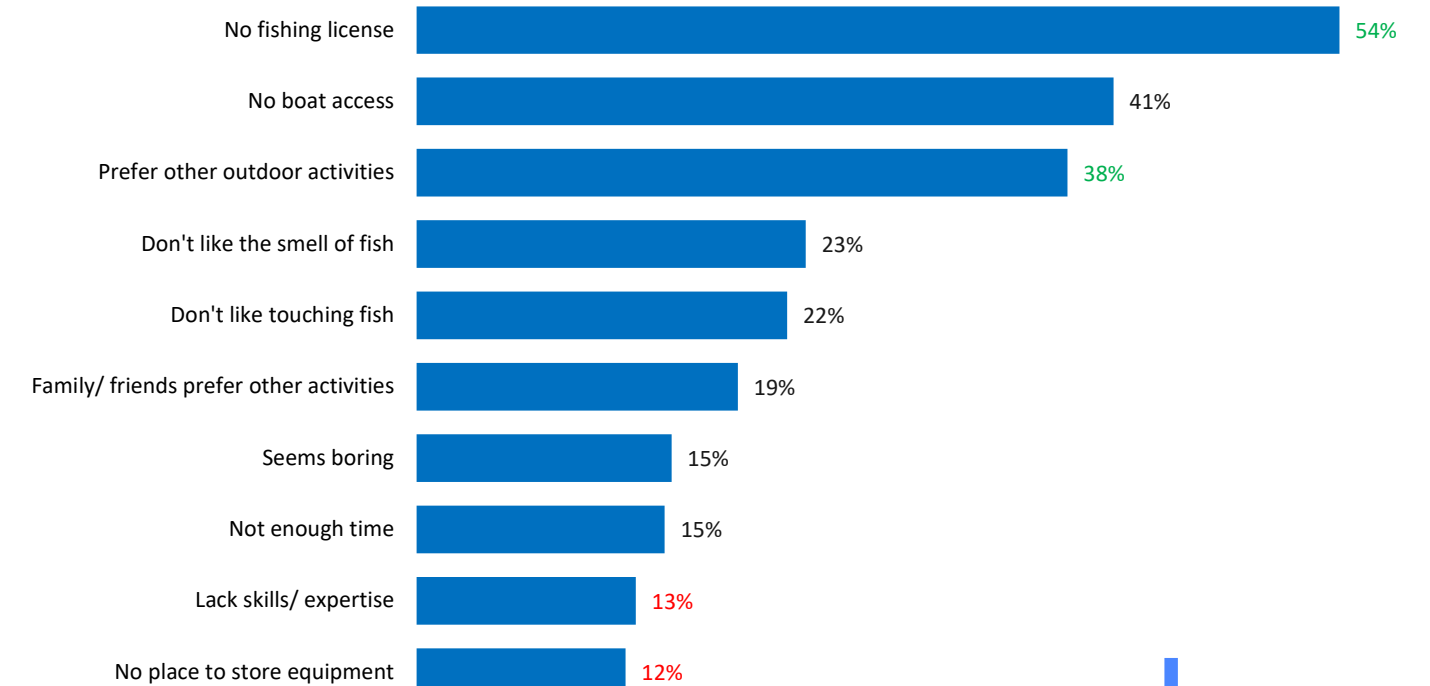
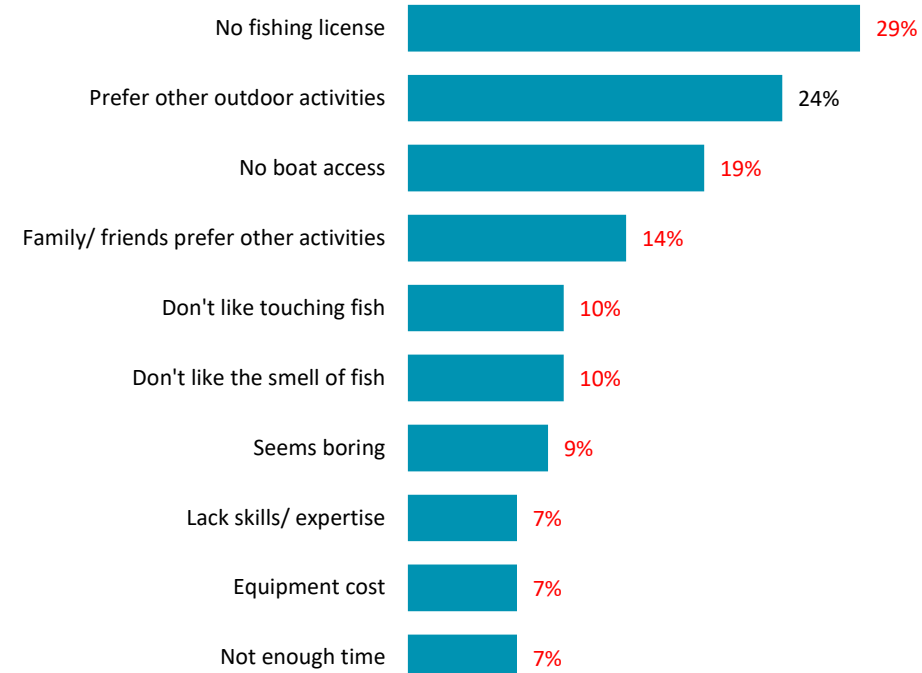
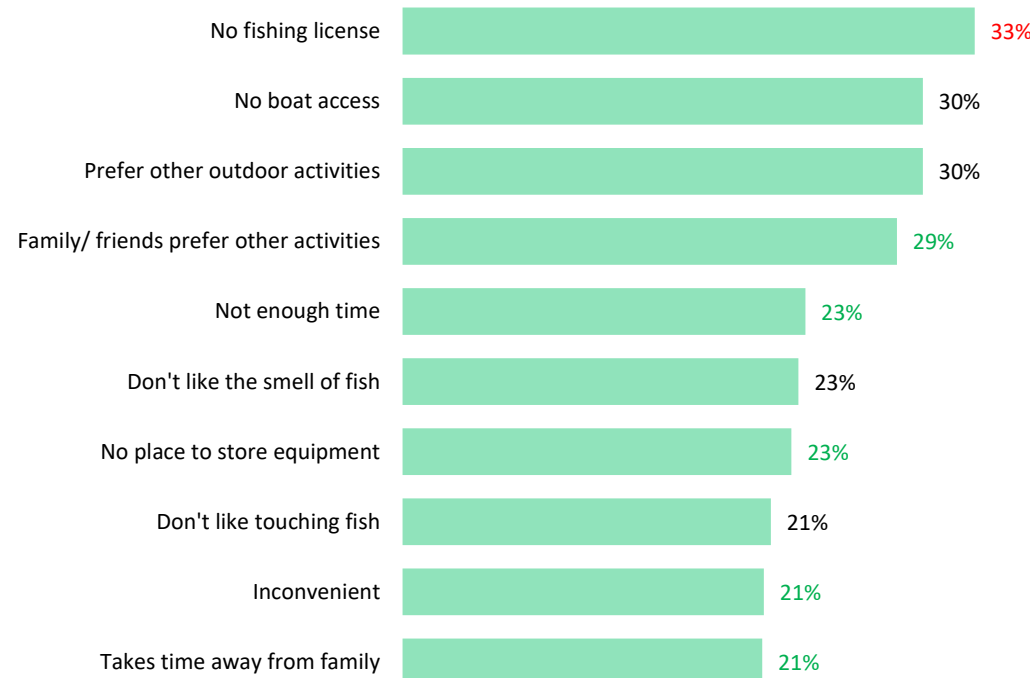
Highlight fishing adventures that don't require a boat and remain challenging/thrilling (e.g. fly, ice)
 Build preference for fishing/boating vs. other outdoor activities by focusing on the thrill/rush that fishing/boating can provide – addressing the key motivations of this segment

Secondary Target



FAMILY-FOCUSED RELAXERS

Give Family-Focused Relaxers ideas for fishing that doesn't require a boat
 Communicate the relaxation benefits of fishing for families and chance to get away/make memories to build preference vs. other activities
 Provide education and diminish hesitations around smell and fear of touching fish



TOP FISHING BARRIERS
(Completely Agree)

General Category

What is going on in the outdoor activity category and what are the motivators for outdoor activities?



who makes up the market

Anglers & boaters generally reflect the overall population, though they are more likely to be comprised of households with kids. Multicultural audiences are less likely to be anglers & boaters relative to rep sample.

		TOTAL REP	BOATERS	ANGLERS	ANGLERS WITHOUT A LICENSE
AGE	18 - 24 (Net)	18%	15%	14%	13%
	25 - 34 (Net)	30%	35%	35%	32%
	35 - 44 (Net)	26%	28%	29%	32%
	45 - 54 (Net)	26%	23%	23%	23%
GENDER	Male	50%	52%	59%	47%
	Female	50%	48%	41%	53%
MARITAL STATUS	Married	50%	55%	56%	54%
	Single, Never Married	32%	26%	24%	26%
	Divorced/ Separated	8%	8%	8%	9%
INCOME	Income (Mean)	\$71,900	\$84,000	\$76,000	\$72,600
EMPLOYMENT STATUS	Full Time	55%	62%	61%	53%
	Other	45%	38%	39%	47%
EDUCATION	High school graduate	19%	13%	18%	16%
	College or some college	64%	68%	64%	70%
	After Bachelor's Degree	15%	18%	16%	11%
KIDS IN HOUSEHOLD	Kids in Household	47%	54%	57%	53%
RACE	White	66%	75%	71%	85%
	Black	10%	5%	9%	10%
	Asian	5%	3%	3%	3%
	Hispanic	17%	13%	13%	10%
REGION	Northeast	19%	17%	17%	18%
	Midwest	21%	25%	23%	30%
	South	39%	42%	42%	36%
	West	22%	16%	18%	17%

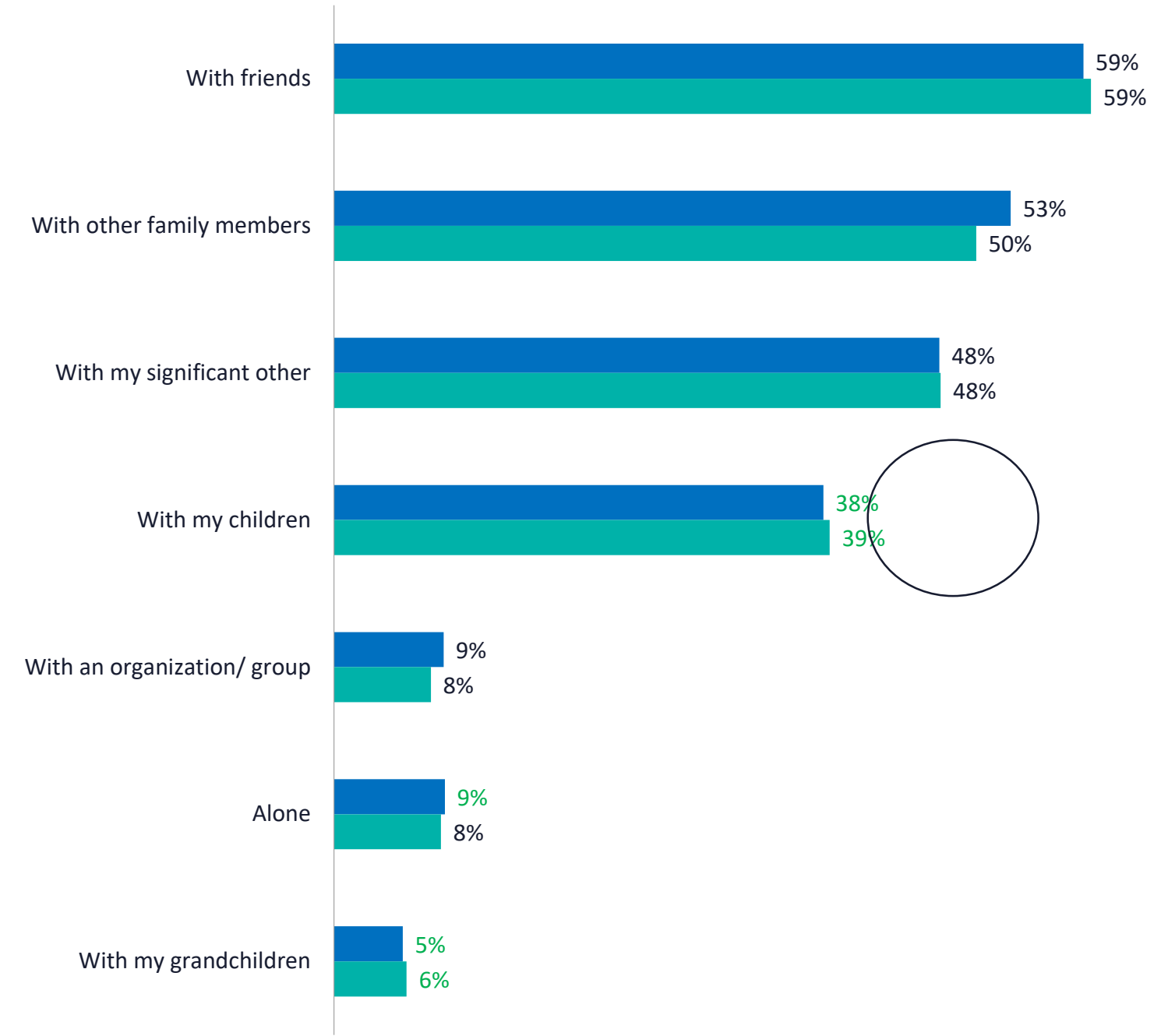


Base: Total Respondents (n=3016), Total boaters (n=701), Total anglers (n=988)
 Multiple demographics questions
 Indexing to Total ≥ 120, ≤ 80

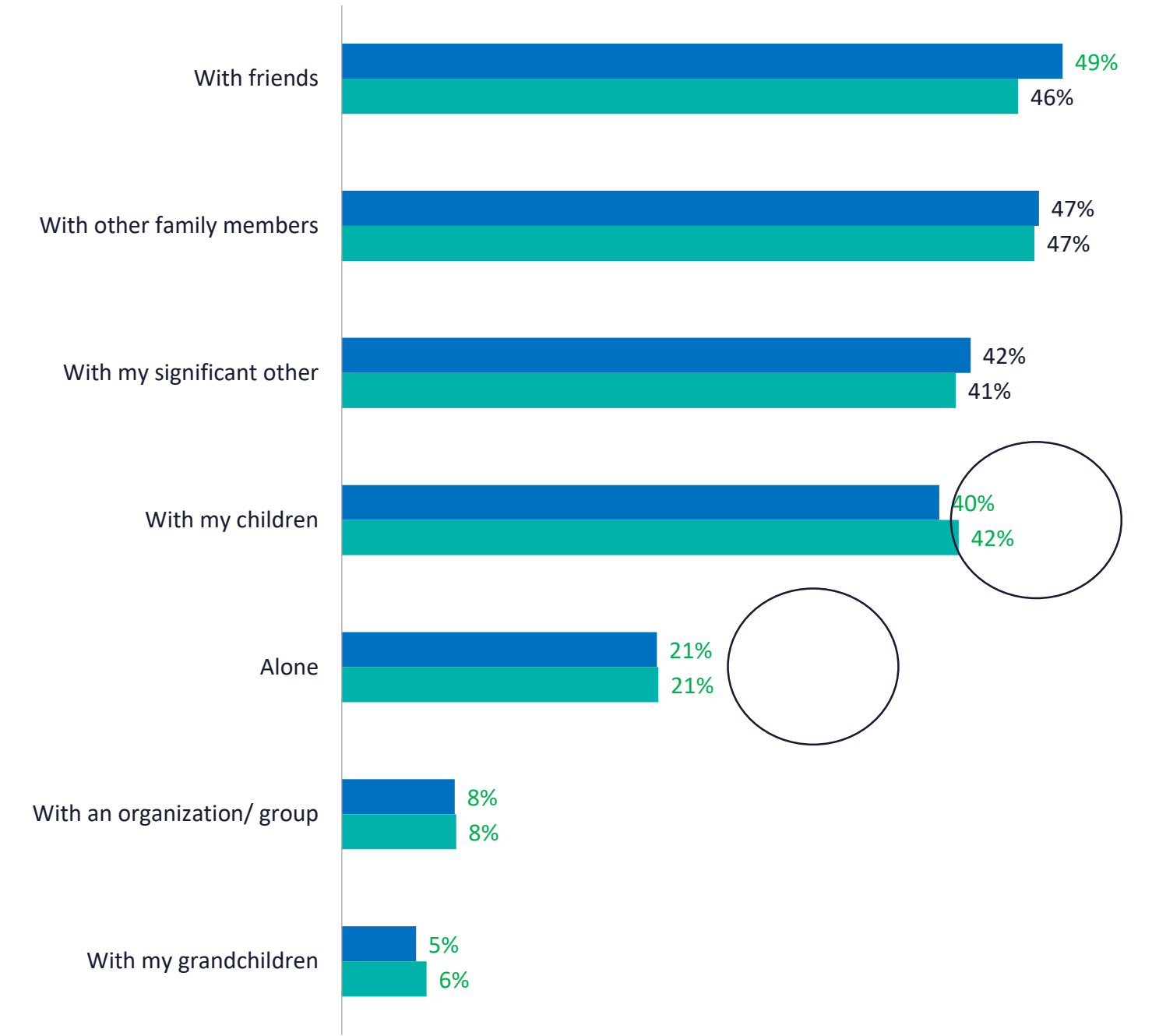
who participates

Boating and fishing are generally social events, with kids being part of the activity more commonly than seen with other outdoor activities. While mainly social in nature, there is a small population for whom fishing is a solo activity.

BOATING



FISHING



■ boaters
■ anglers

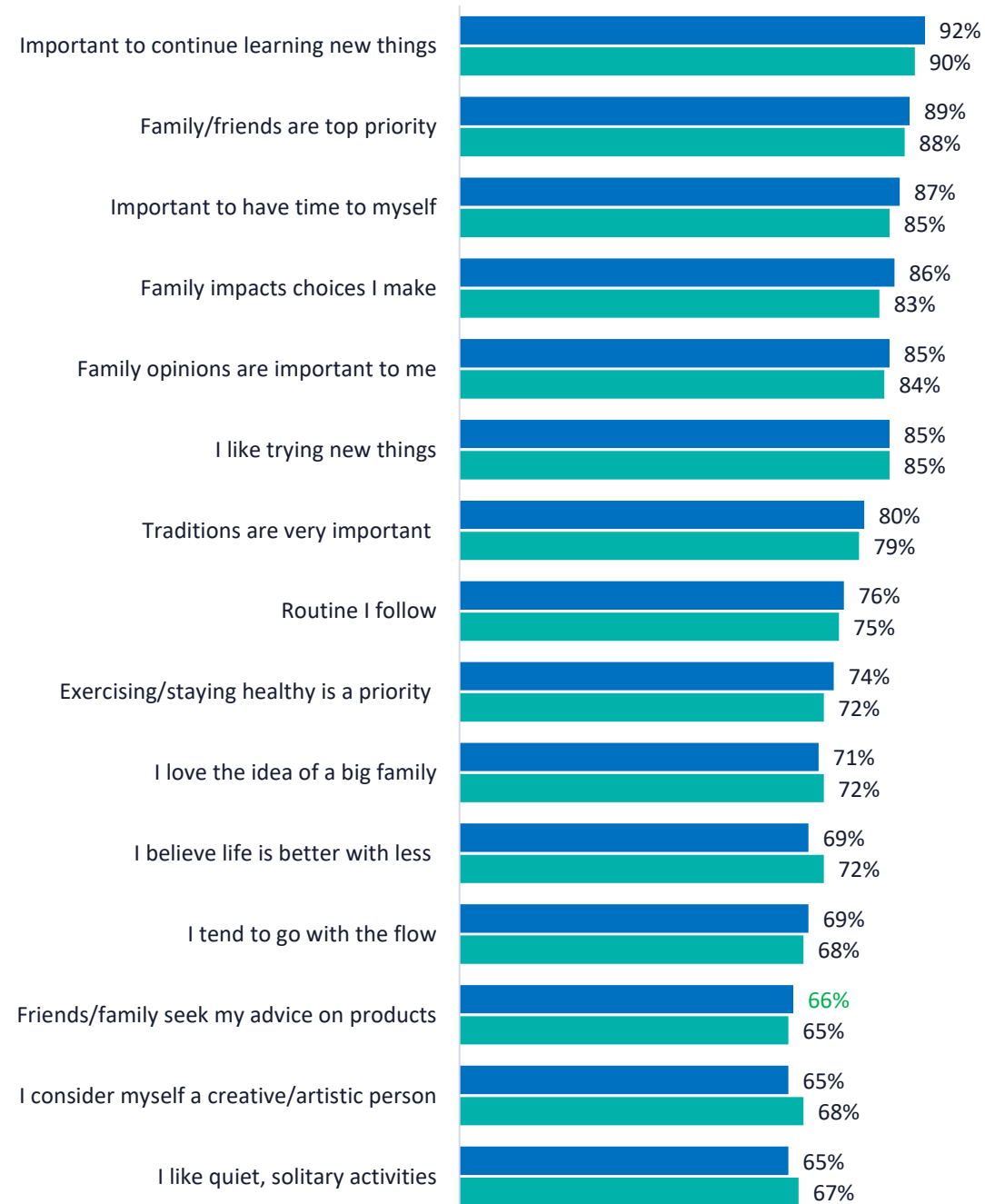


Base: Total boaters (n=701), Total anglers (n=988)
 A1. When you participate in each of the following activities, who typically participates with you? Select all that apply.
 Indexing to Total ≥ 120, ≤ 80

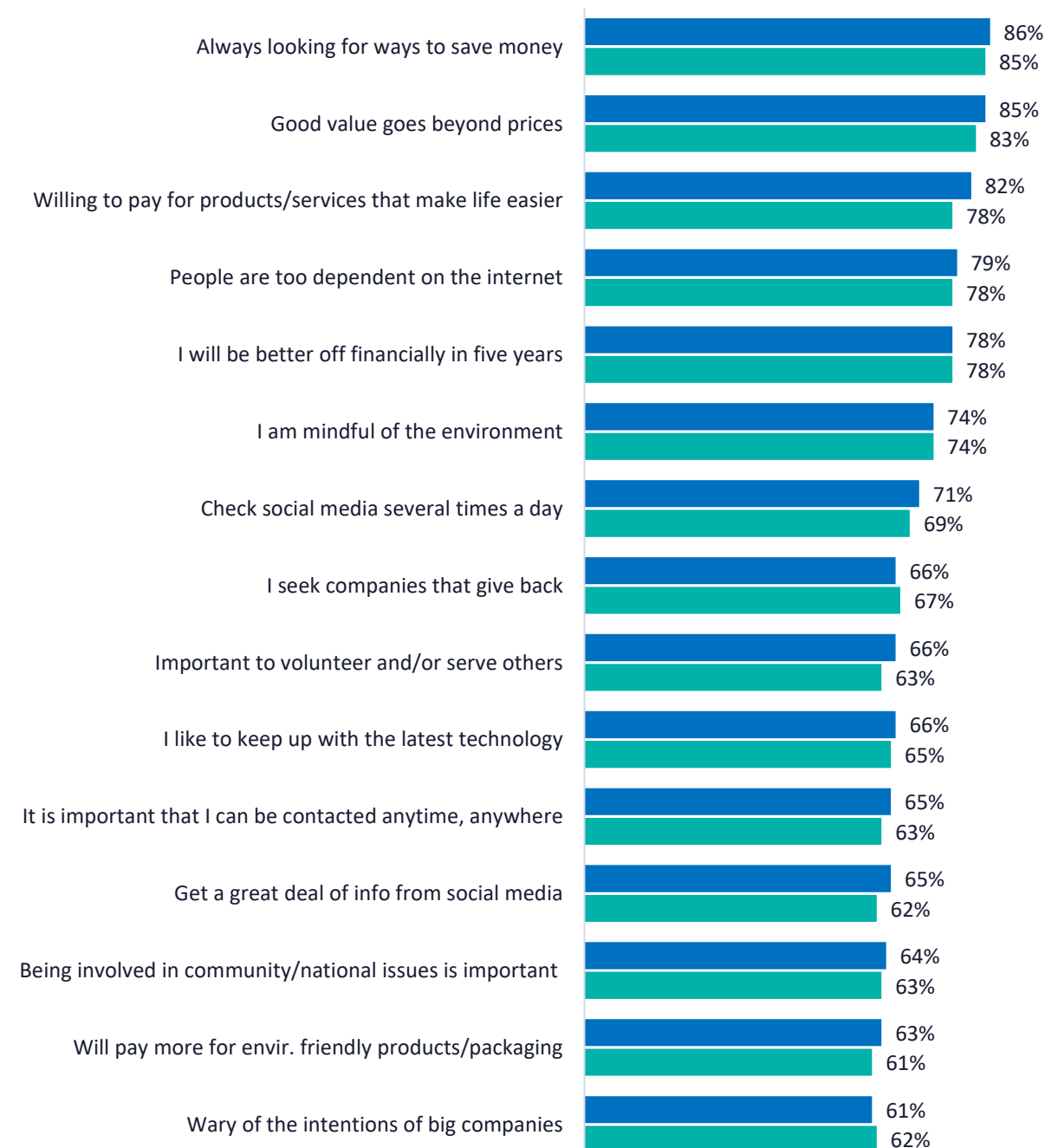
WHAT ARE THE ATTITUDES OF BOATERS AND FISHERS?

Personal values of boaters and anglers mirror the general population – nearly all consider friends and family to be a top priority, consider it important to learn new things, and look for ways to save money.

FAMILY/ PERSONAL ATTITUDES* (Completely/ Somewhat Agree)



VIEWS/ OVERALL LIFESTYLE* (Completely/ Somewhat Agree)



*Only top 15 are shown

Base: Total boaters (n=701), Total anglers (n=988)

E1. Below are some statements people might have about their health and lifestyle. For each statement below, please indicate how much you agree or disagree.

E2. Below are some statements people might have about their views and overall lifestyle. For each statement below, please indicate how much you agree or disagree.

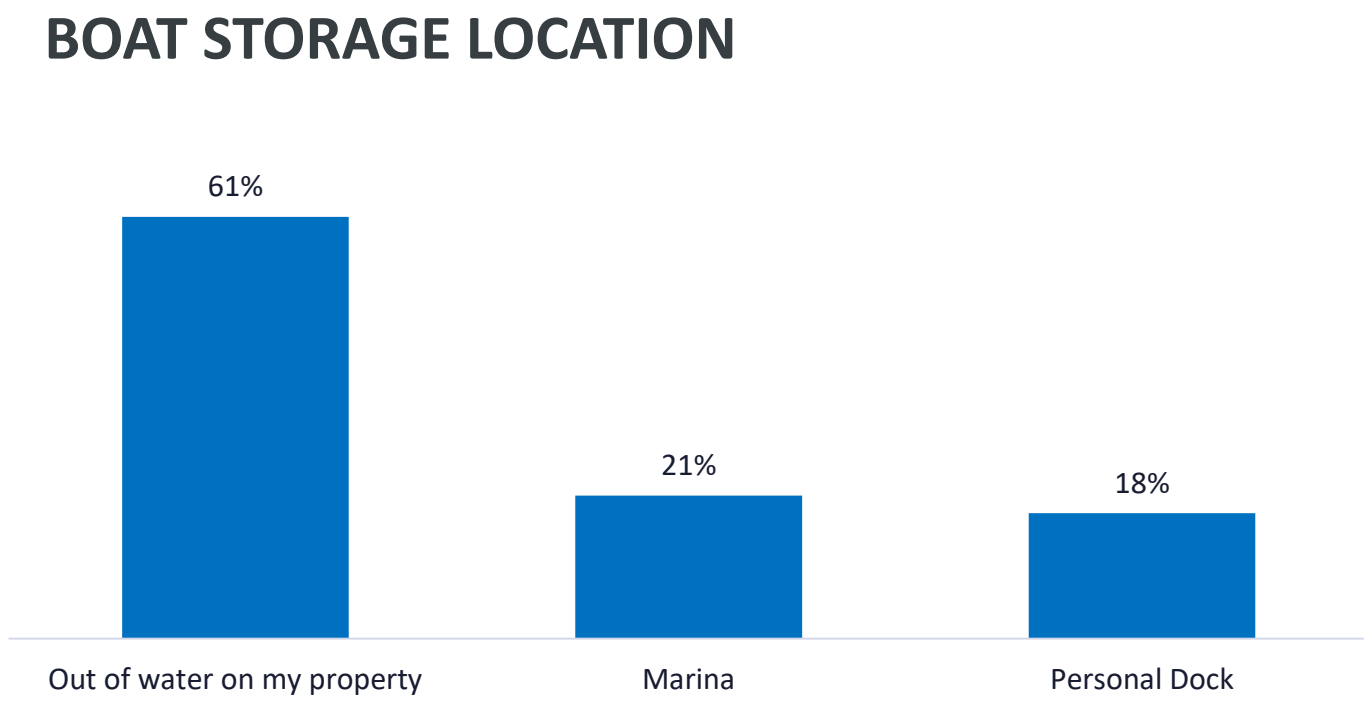
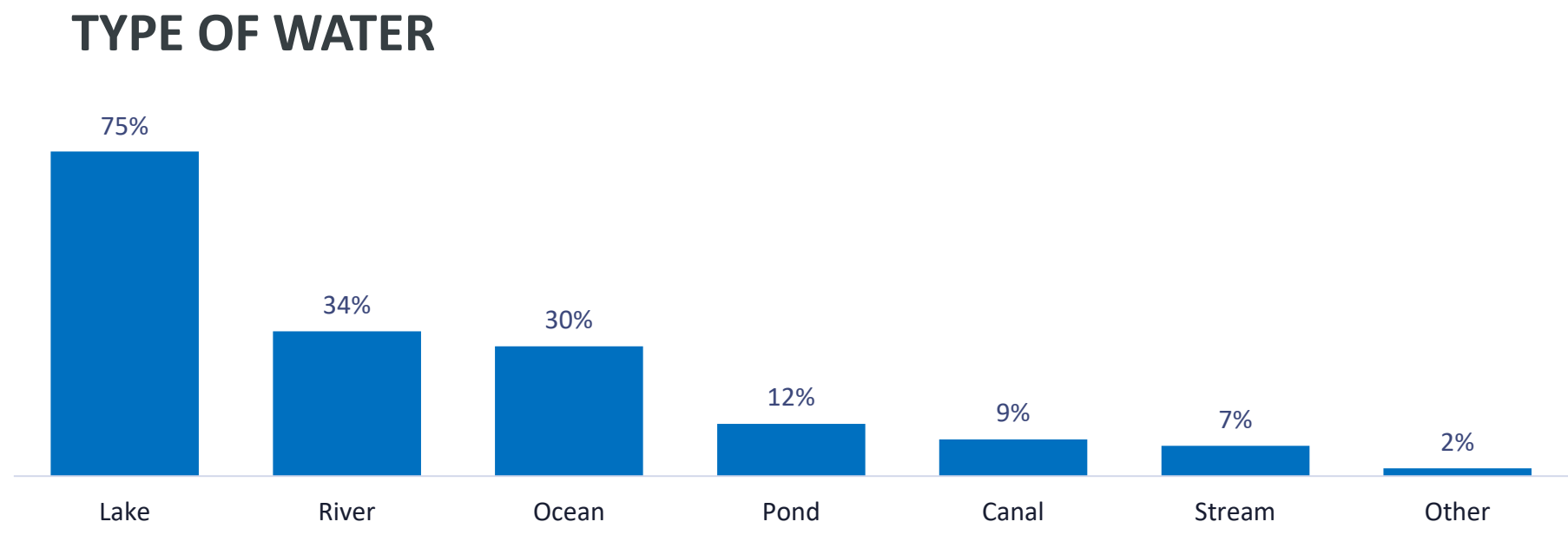
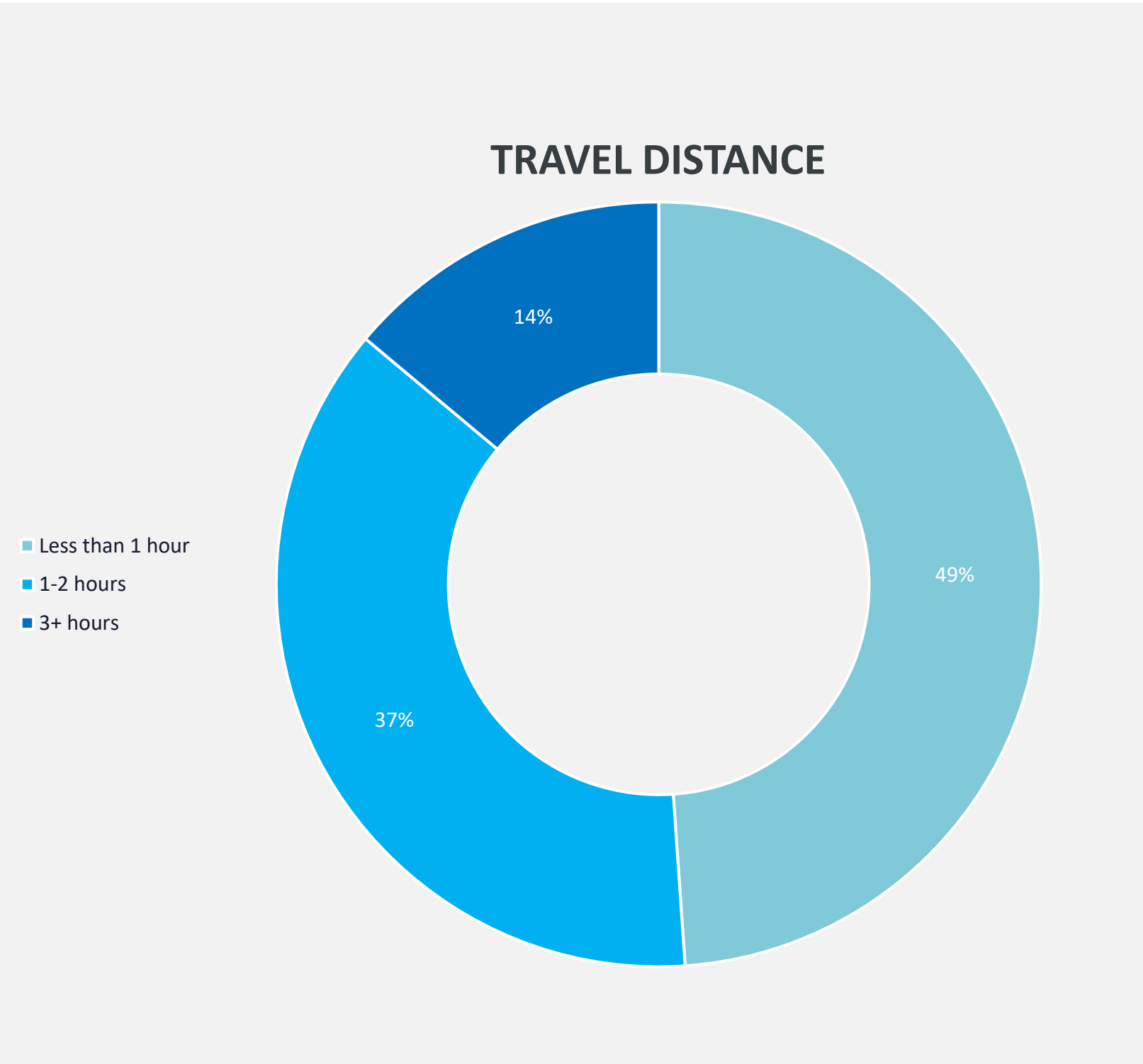
Indexing to Total $\geq 120, \leq 80$



boaters
anglers

where are respondents boating

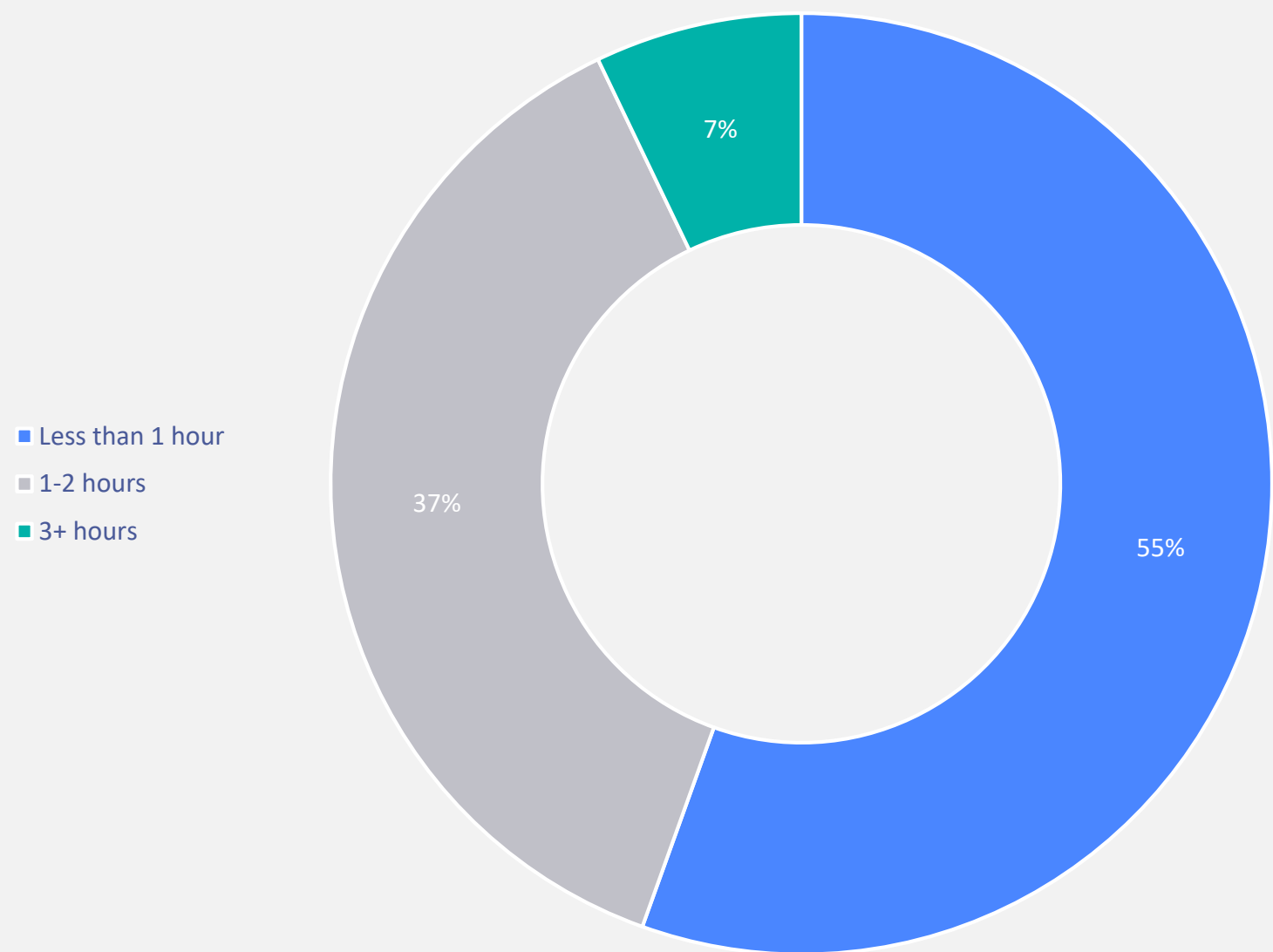
Boating on lakes is most common and travel distances to get to the boating site is largely less than 2 hours. Most boaters store their vessel on their property.



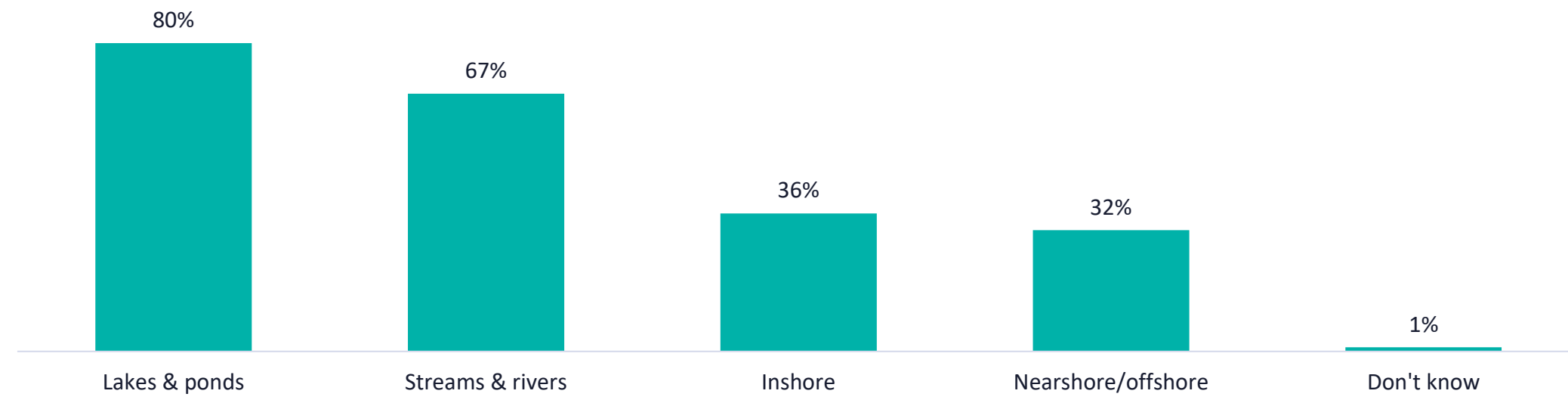
where are respondents fishing

Fishing is also most typically done in lakes or ponds and off land, a pier or a dock. Fishing locations are also largely within 2 hours of travel time.

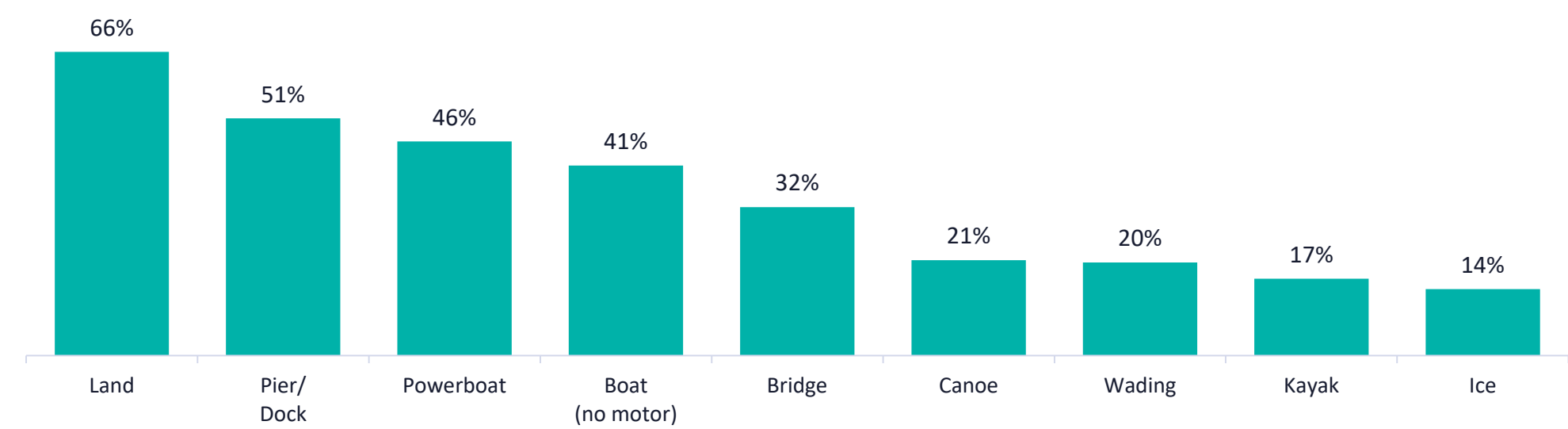
TRAVEL DISTANCE



TYPE OF WATER



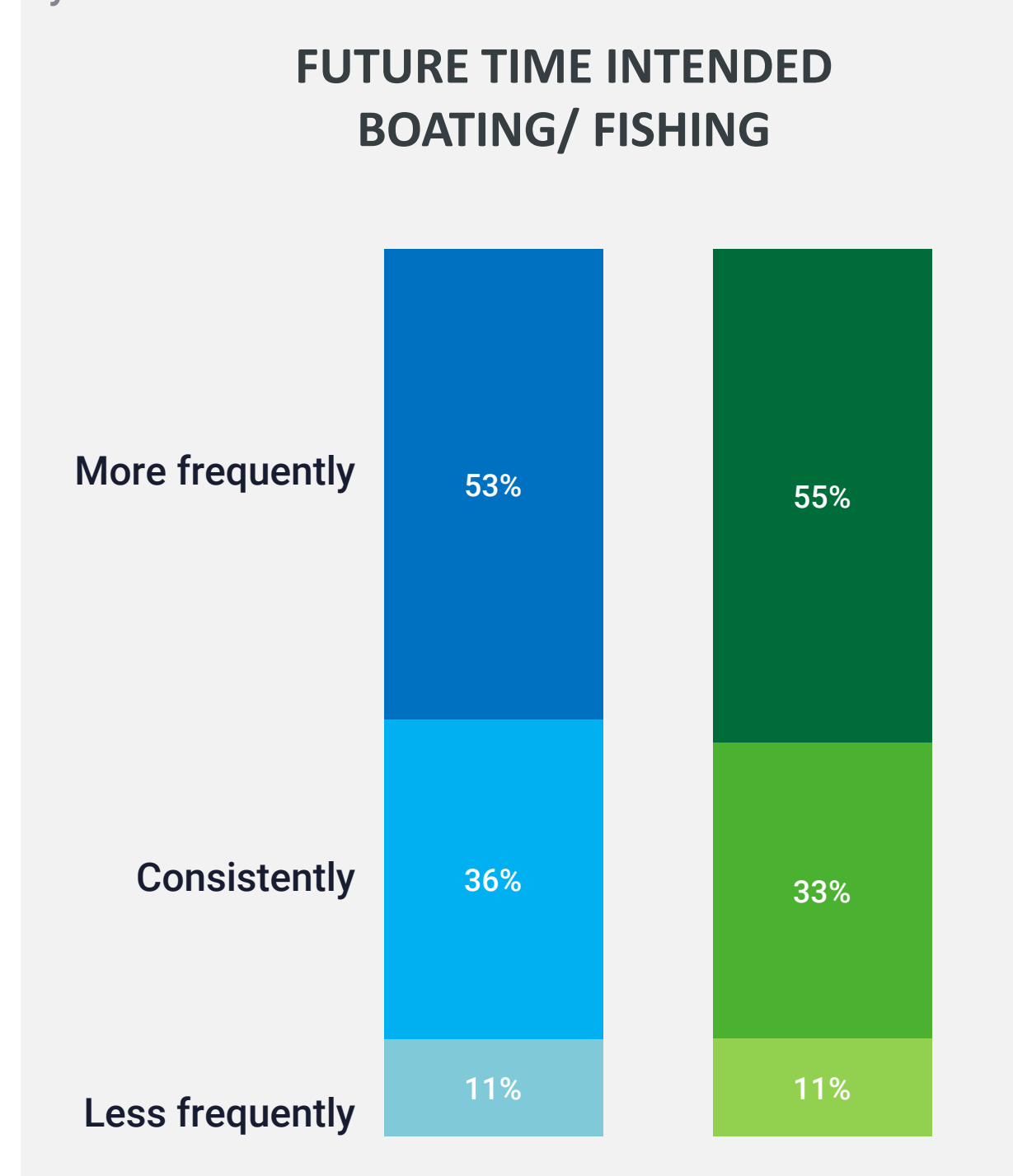
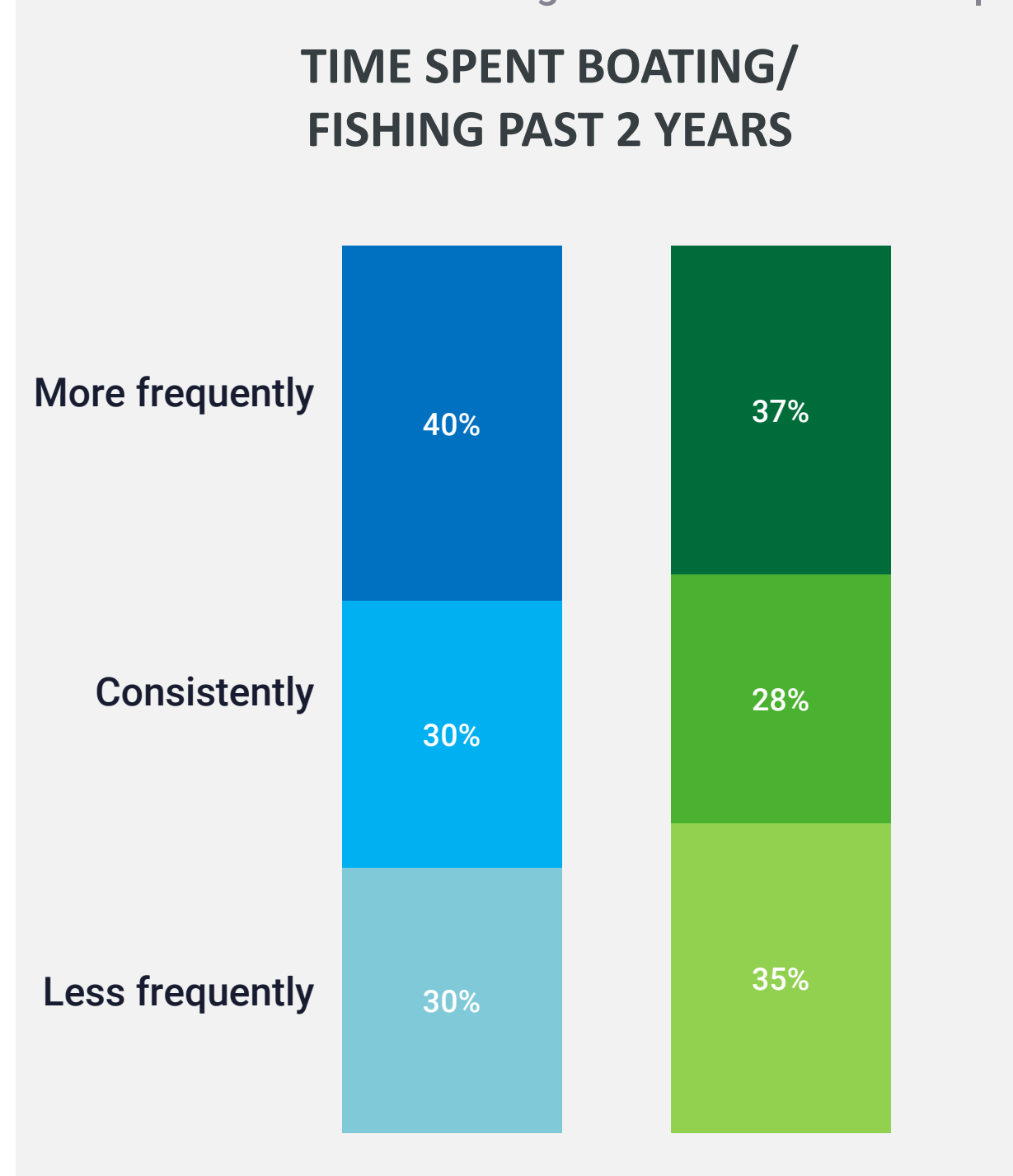
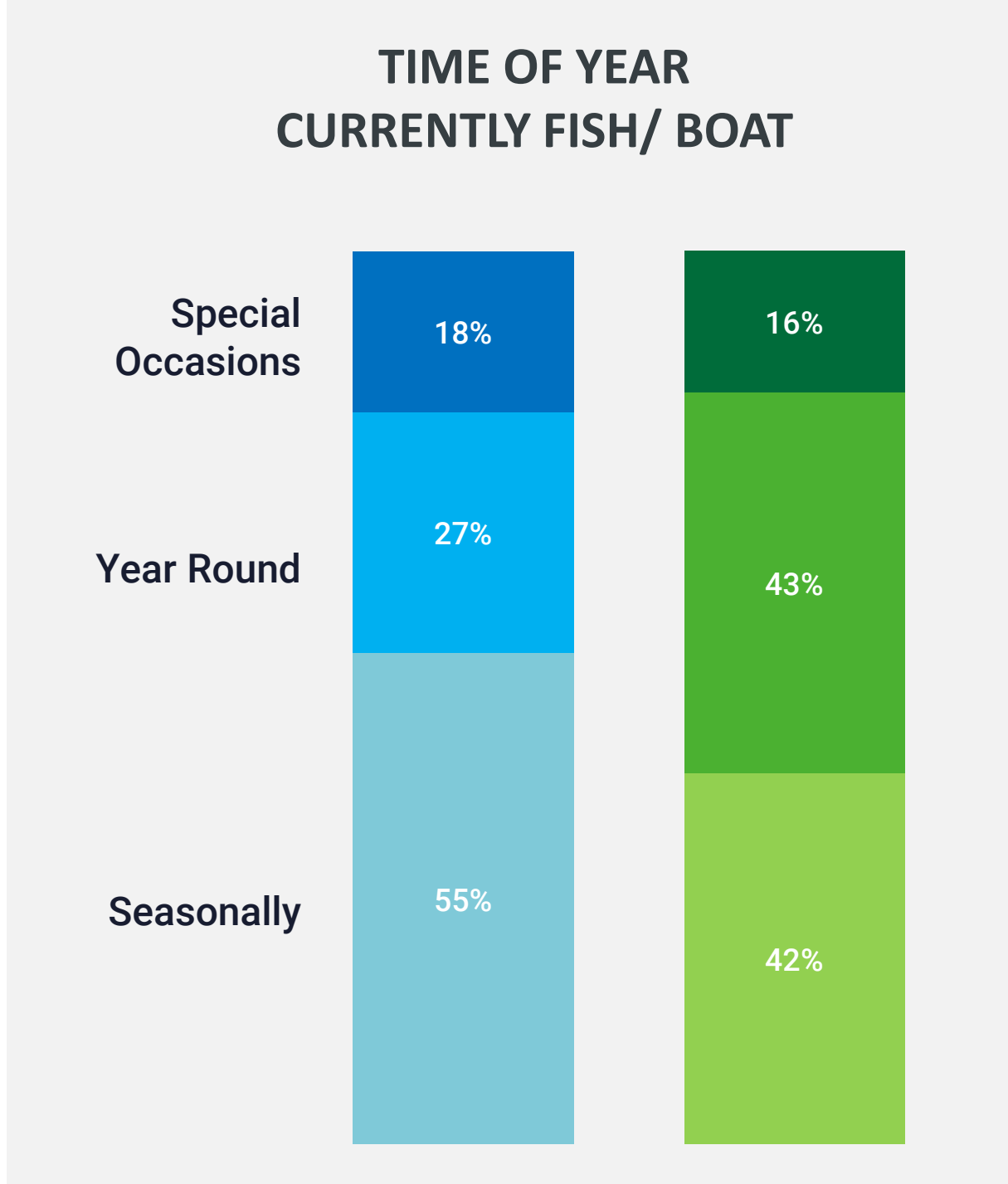
LOCATION



Base: Total anglers (n= 988)
 Q3. In what type of water do you typically fish? Select all that apply. | Q4. And, from which location(s) do you typically fish? Select all that apply. | Q4a. When you fish, how far do you typically have to go? Select one.

how much time respondents are fishing & boating

Boating is most likely a seasonal activity, while fishing is a mixture of seasonal and year-round participation. Trends for both fishing & boating are favorable, with most intending to fish/boat more frequently in the future.



■ boaters ■ anglers

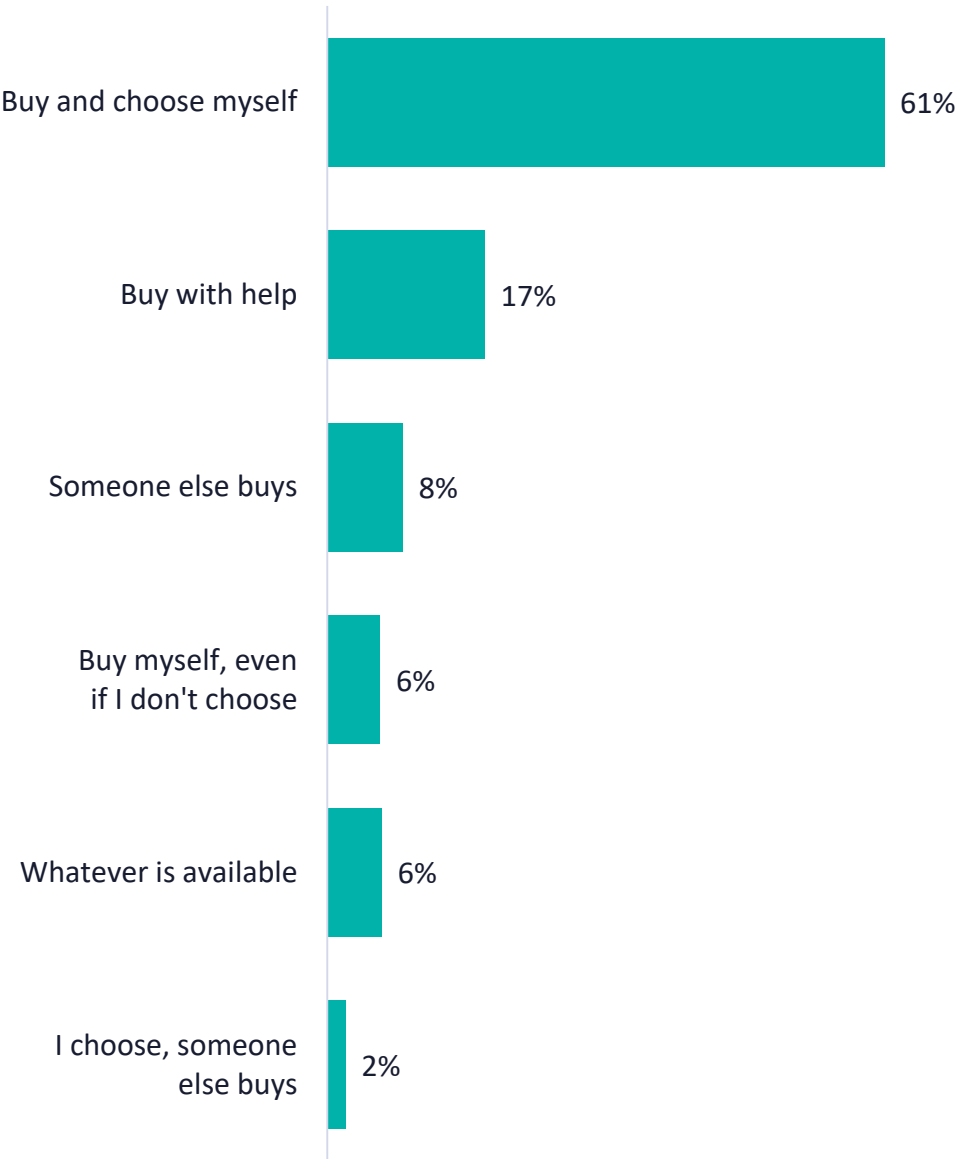


Base: Total boaters (n=701), Total anglers (n=988)
 Q1a. Do you fish seasonally or year-round? | Q5a. Thinking about the past 2 years, which of the following is most accurate? Select one. | Q5b. And, thinking about the future, which is true? Select one. | Q23a. Do you boat seasonally or year-round? | Q26. Thinking about the past 2 years, which of the following is most accurate? Select one. | Q27. And, thinking about the future, which is true? Select one.

how are fishers buying equipment

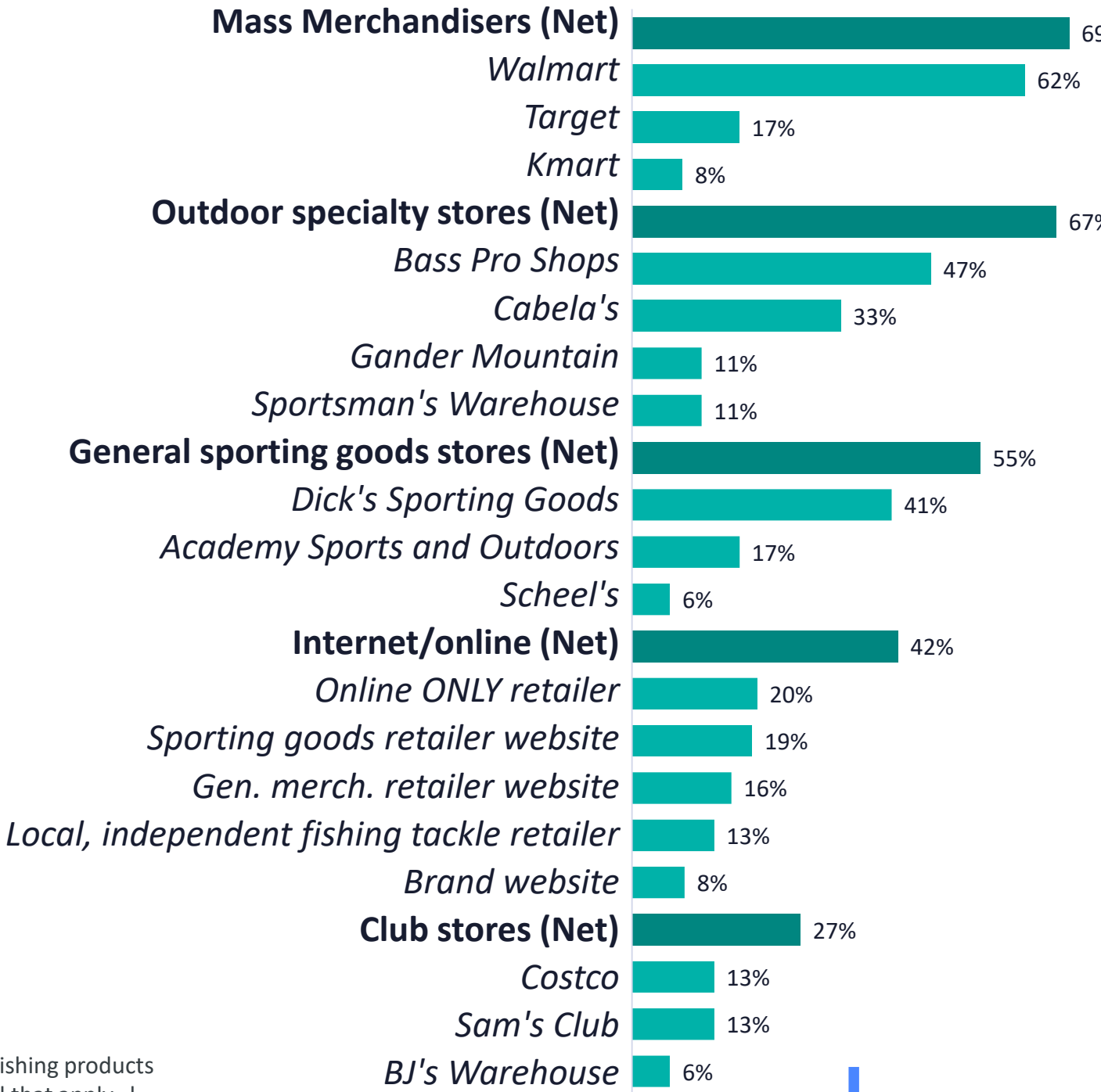
While there is a wide range of spending on fishing equipment, overall anglers spend upwards of \$400 on equipment and bait in a year's time. They are typically choosing and buying for themselves, with Walmart the top retailer.

FISHING PRODUCTS PURCHASE INVOLVEMENT



\$424 average spent on fishing equipment within the past 12 months

PURCHASE LOCATION OF FISHING NEEDS



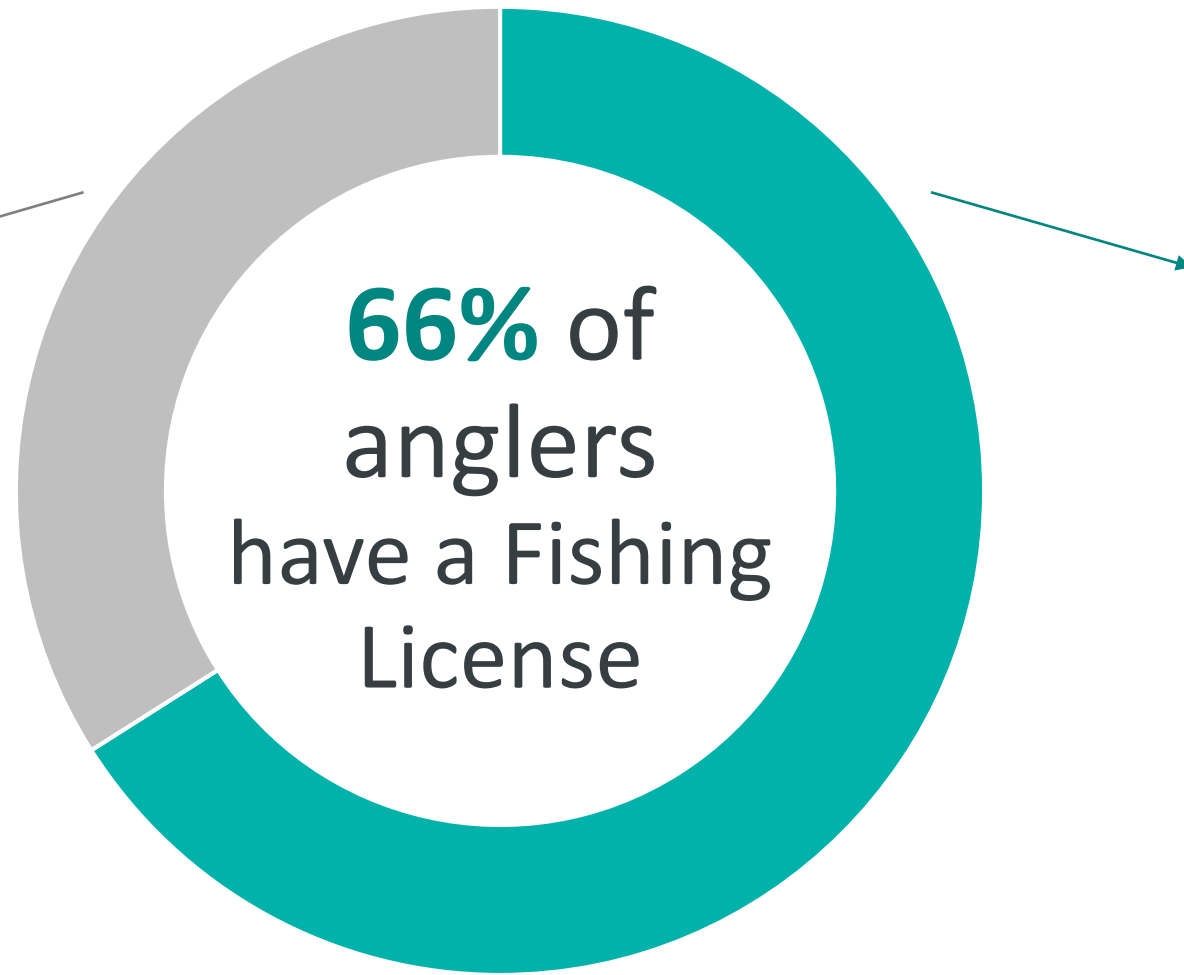
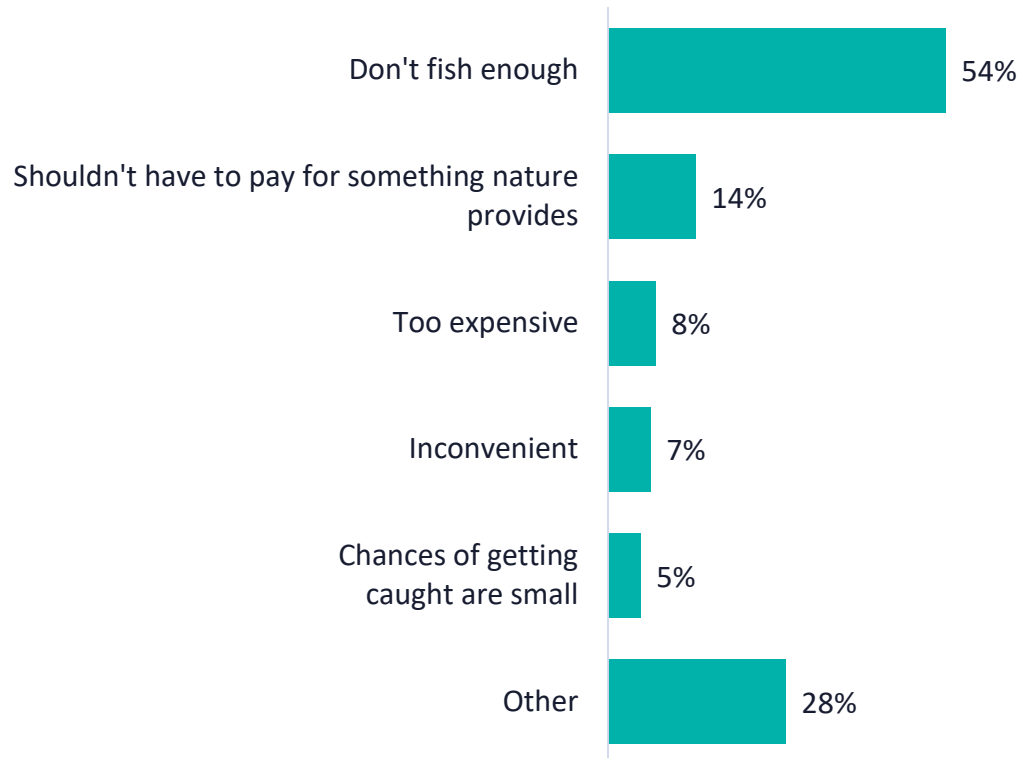
Base: Total anglers (n= 988)
 Q7. Which one of the following statements best describes your involvement in choosing and purchasing fishing products (such as rods, reels, lines, bait, etc.) Select one.. I Q8. What store do you go to for fishing needs? Select all that apply.. I Q6. Approximately how much would you estimate that you have spent on fishing equipment (rods, reels, combos, line, terminal tackle, and bait) in the past 12 months?



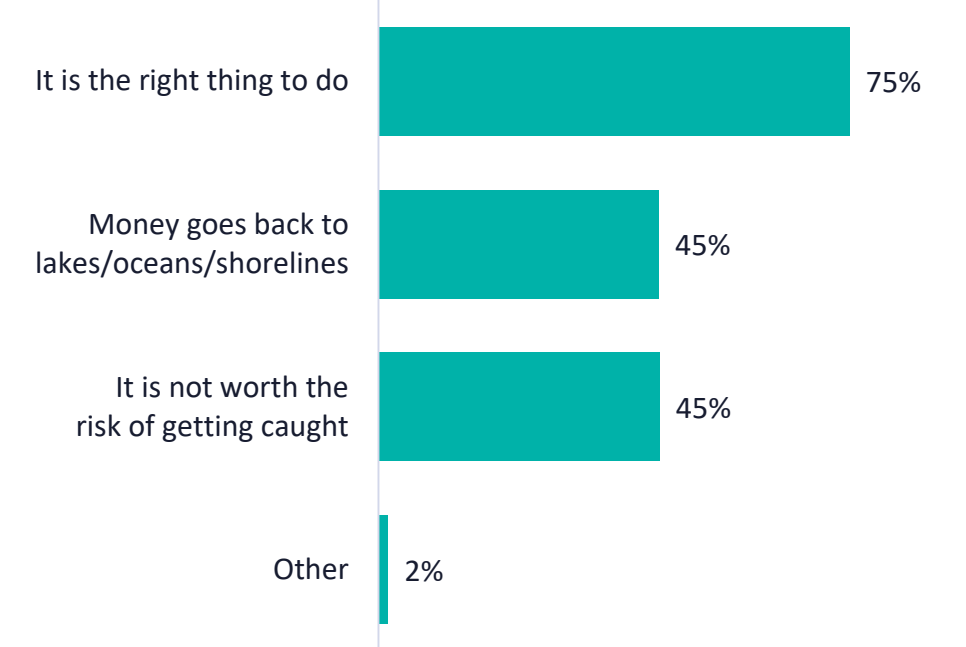
how respondents are getting fishing licenses

Two-thirds of anglers have a fishing license, with Walmart being the top distributor. For those that don't have a license, most cite the infrequency of their fishing as why they haven't gotten one.

REASON FOR NOT BUYING FISHING LICENSE

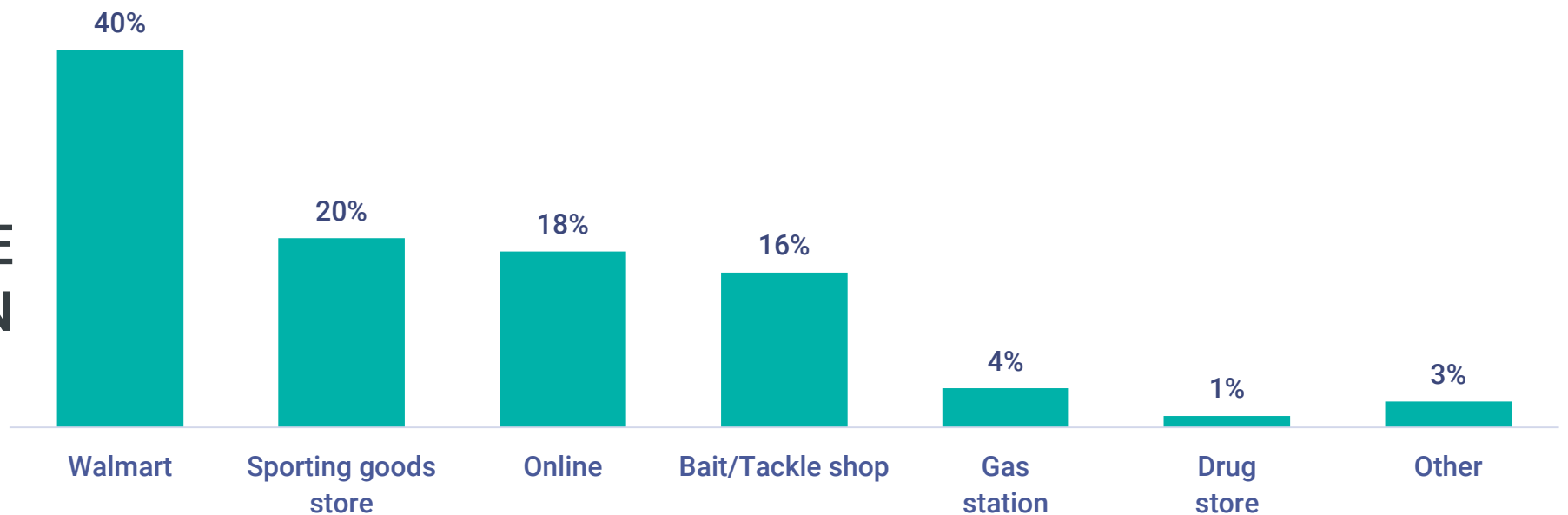


REASON FOR BUYING FISHING LICENSE



Many of the 'other' responses mention that a license will be purchased but that it's not yet 'fishing season' and they have yet to renew their license for the year. This suggests that the % who have a fishing license is likely higher than reported 66%

FISHING LICENSE PURCHASE LOCATION



Base: Total anglers (n= 988)
 Q11. Do you currently have a fishing license? | Q12. Where did you most recently purchase your fishing license? | Q13. Why did you buy a fishing license? Please select all that apply. | Q14. Why do you not have a fishing license? Select all that apply.



fishing license statements

'OTHER' REASON FOR NOT BUYING FISHING LICENSE



9 Mentions of 'expired'
 21 Mentions of 'new'
 19 Mentions of 'season'
 43 Mentions of 'yet'

"The fishing season has just started and haven't found time to get a new license yet."

"It expired and haven't renewed yet, will renew when plan on fishing again"

"Season hasn't started yet"

"Have not purchased a new one yet for this year."

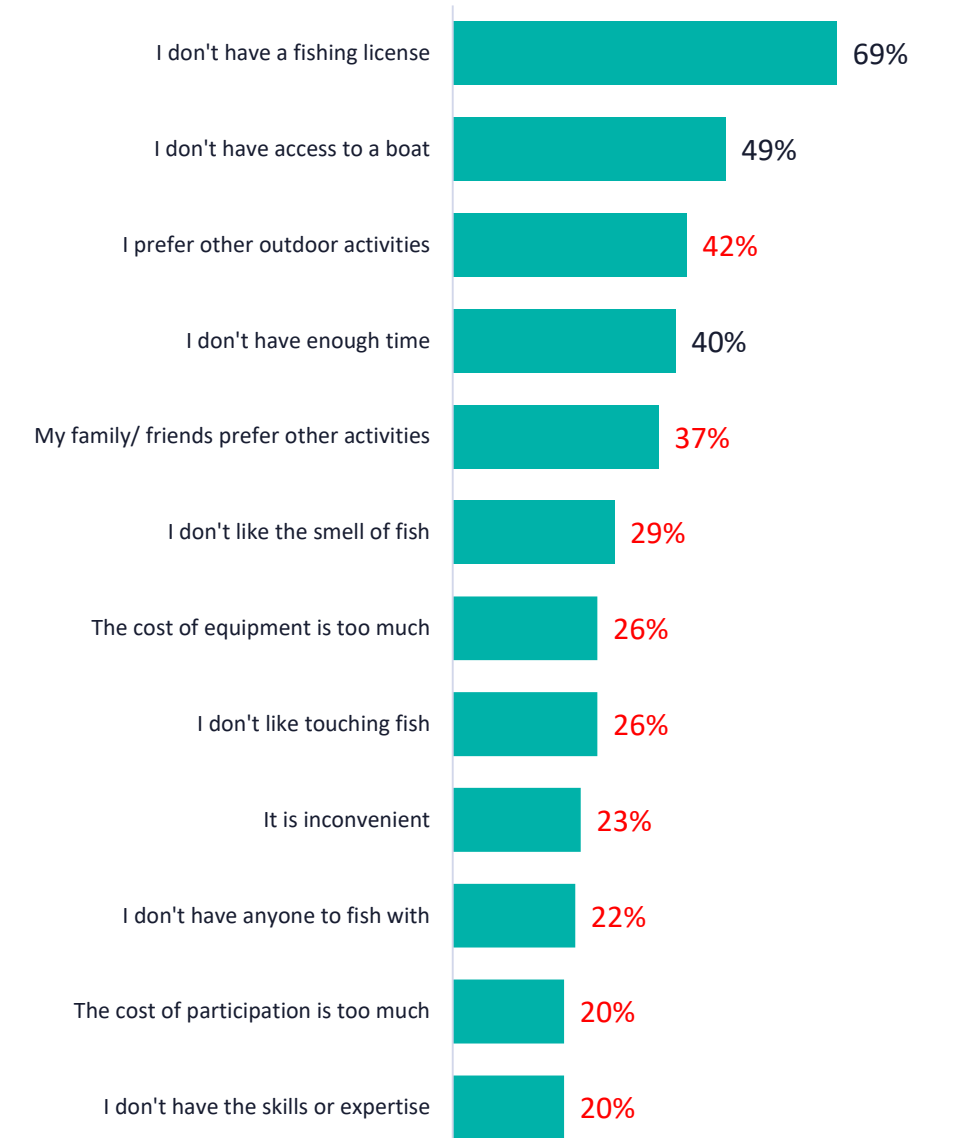
"Mine expired and haven't gotten another one yet"

"Old one just expired. Got to get the new one"

"Plan on getting one the next time I plan going out with my friends"

Many anglers who do not have a license note it is because theirs expired or they have not gotten a new one due to the season not starting yet. Likewise, 2 in 3 consider this a barrier.

FISHING STATEMENT AGREEMENT



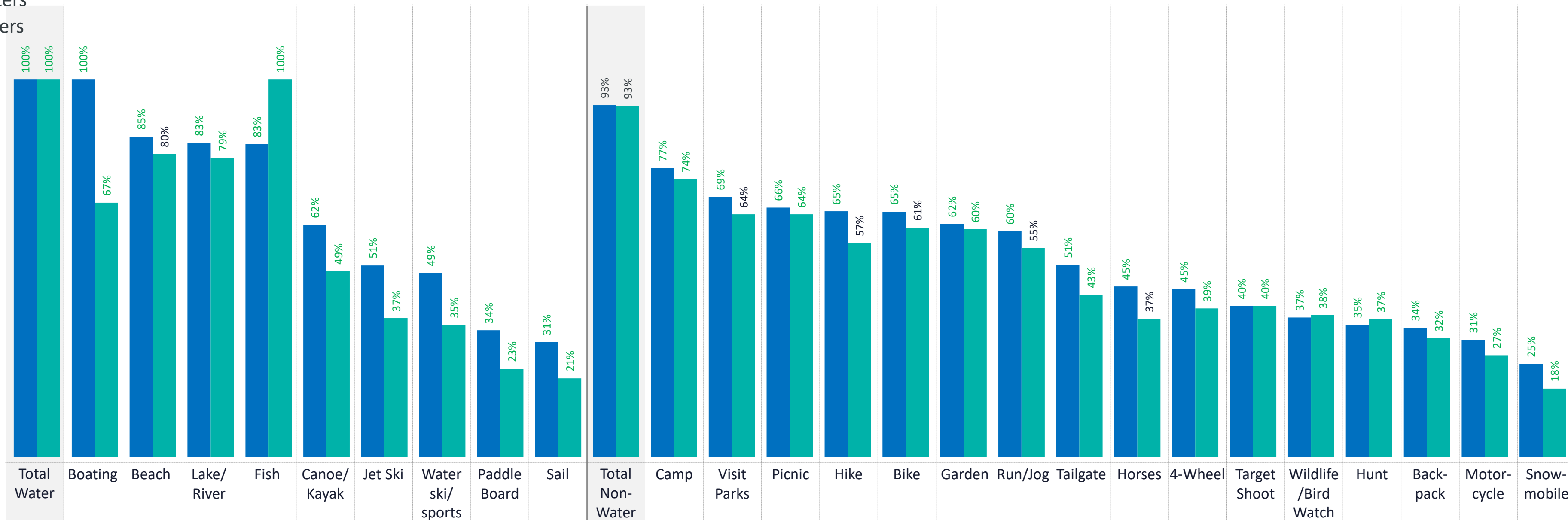
Base: anglers without a license (n=333)
 Green indicates over index versus total
 Red indicates under index versus total

popular outdoor activities

Anglers & boaters show higher than average participation in a variety of outdoor water and non-water activities.

ACTIVITIES

boaters
anglers



AVG FREQUENCY OF PARTICIPATION

Activity	Boater	Fisher
Total Water		
Boating	7.1	5.4
Beach	7.4	6.5
Lake/River	8.9	7.8
Fish	8.0	8.3
Canoe/Kayak	4.5	4.2
Jet Ski	4.5	4.0
Water ski/sports	5.2	5.0
Paddle Board	4.6	4.6
Sail	4.3	4.2
Total Non-Water		
Camp	5.7	5.2
Visit Parks	5.4	5.1
Picnic	6.7	6.4
Hike	7.4	7.1
Bike	9.0	9.2
Garden	10.8	11.0
Run/Jog	12.7	12.5
Tailgate	5.6	5.2
Horses	3.7	3.4
4-Wheel	5.8	5.6
Target Shoot	6.8	6.4
Wildlife/Bird Watch	7.8	7.5
Hunt	6.6	5.6
Back-pack	5.4	5.1
Motor-cycle	6.6	6.1
Snow-mobile	4.3	4.6



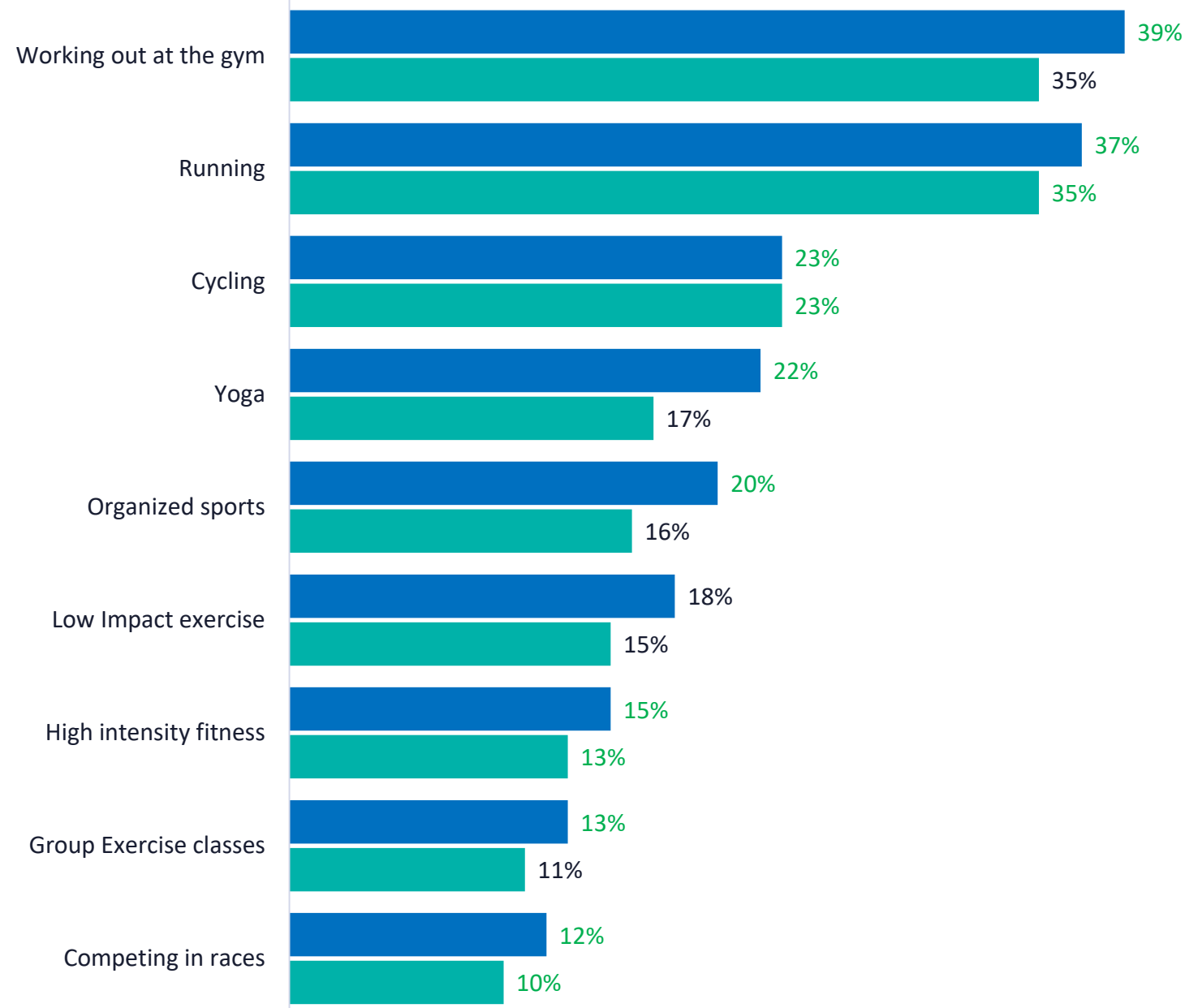
Base: Total boaters (n=701), Total anglers (n=988)
 S1. Which of the following activities, if any, have you ever participated in? Select all that apply. | S1a. Approximately how many times per year do you engage in each of the following activities? Select one for each.
 Indexing to Total ≥ 120, ≤ 80

other hobbies they enjoy

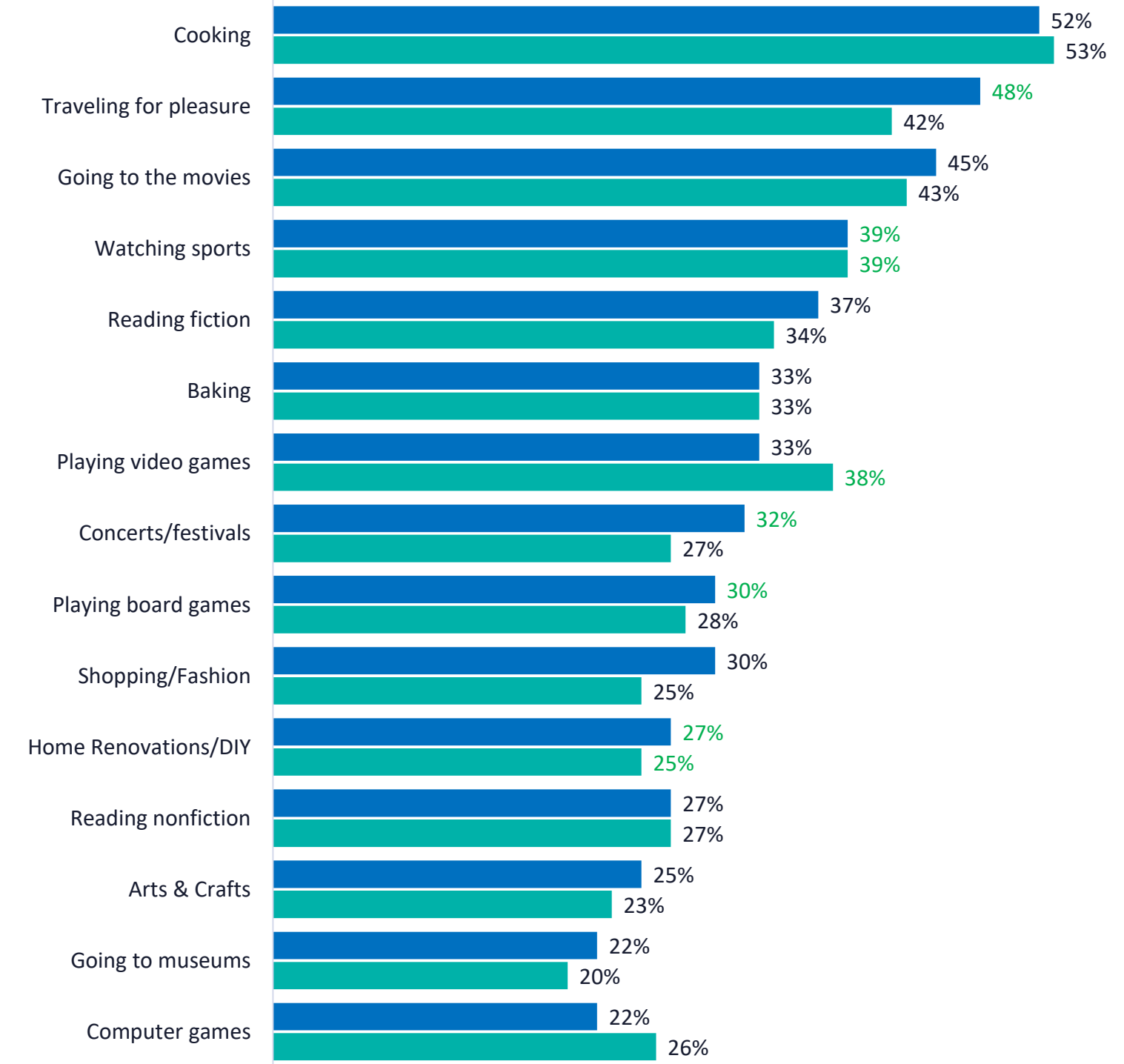
Anglers & boaters are also more likely to be participating in physical fitness activities, from working out to running, cycling and yoga.

boaters
anglers

PHYSICAL ACTIVITY HOBBIES



INDOOR ACTIVITY HOBBIES*

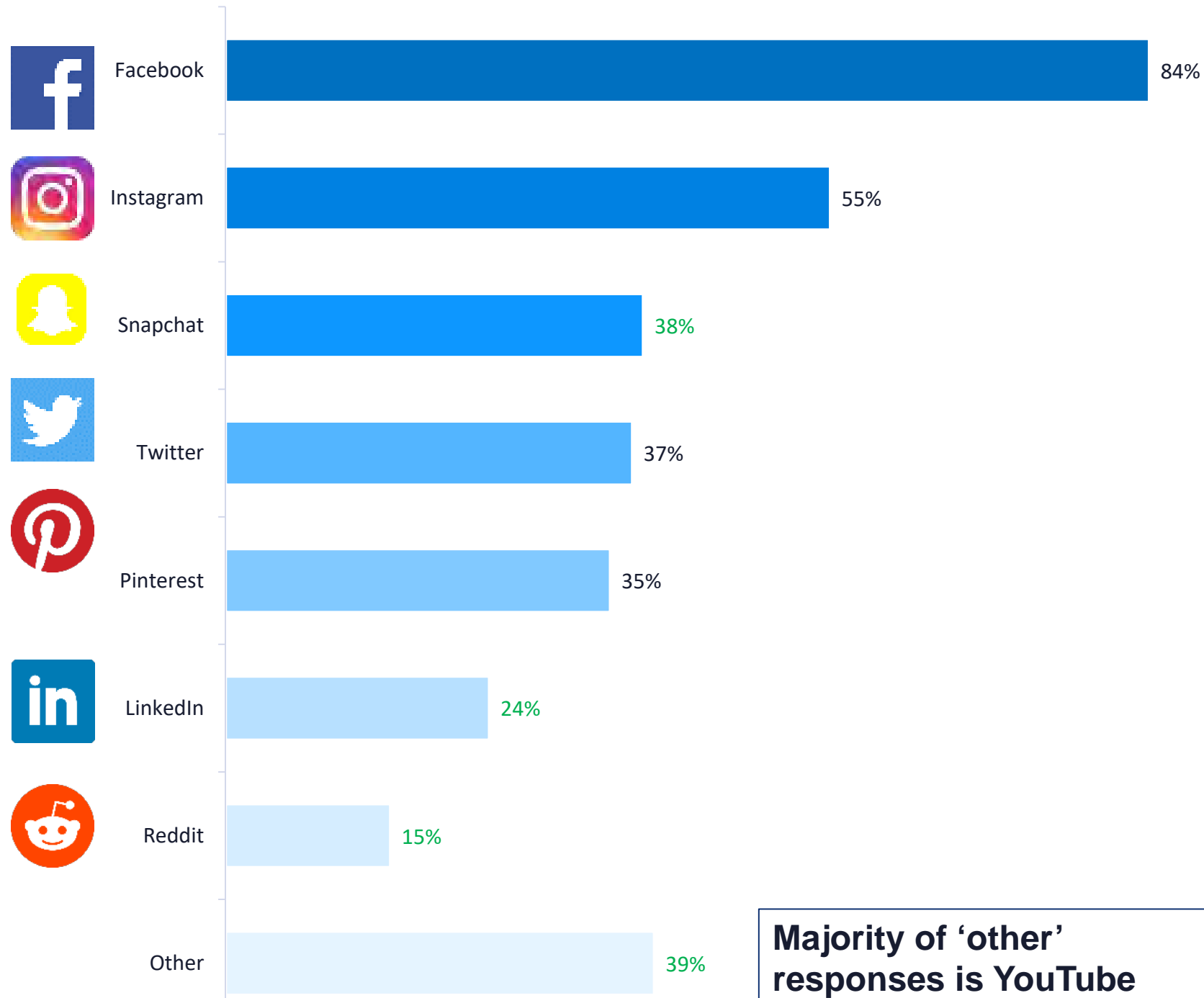


*Top 15
 Base: Total boaters (n=701), Total anglers (n=988)
 E3. Which of the following activities do you consider your hobbies? Select all that apply.
 Indexing to Total ≥ 120, ≤ 80

social media behavior

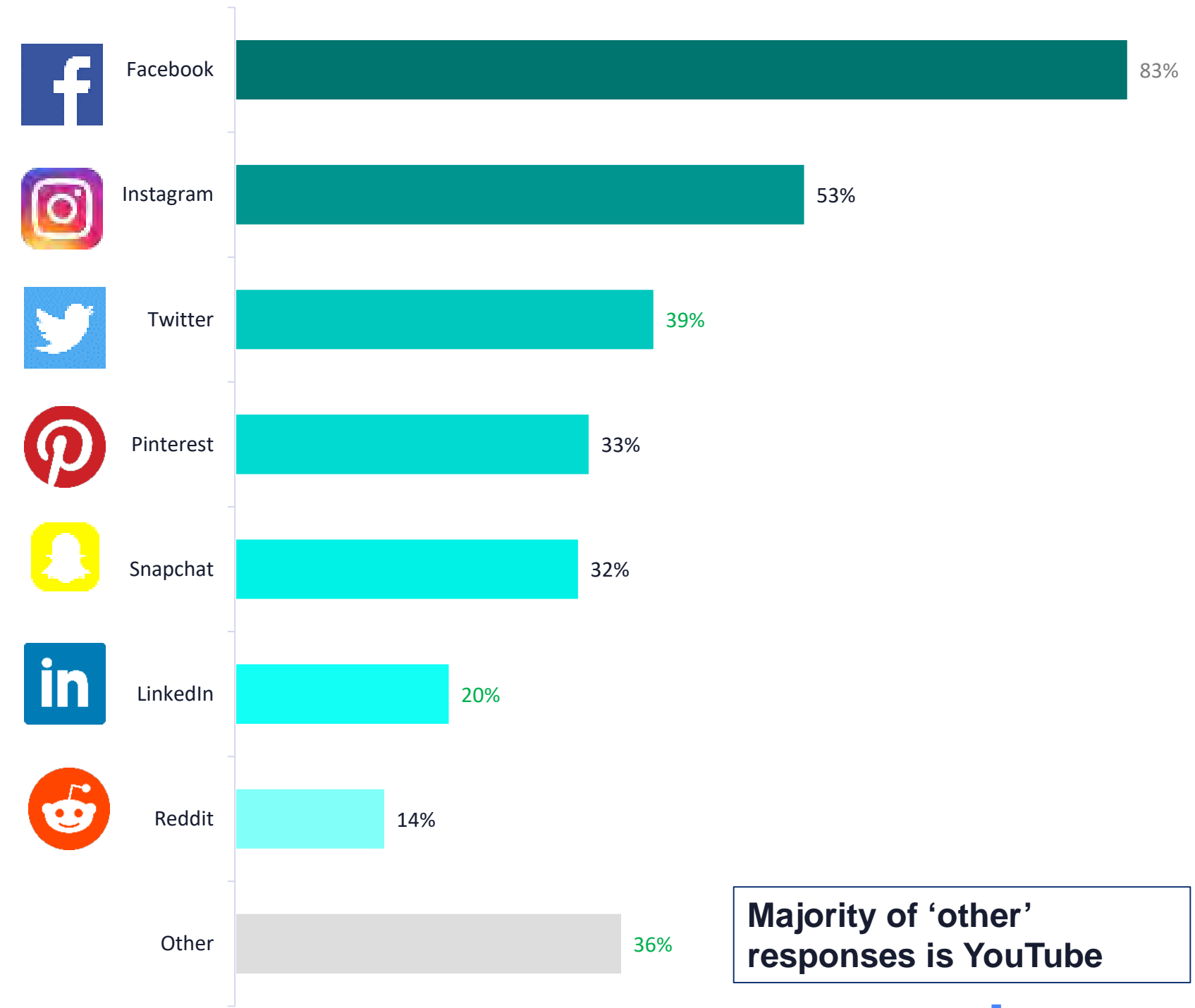
Like others, anglers & boaters are regularly engaged with social media – most commonly Facebook and Instagram.

BOATERS



Majority of 'other' responses is YouTube

FISHERS



Majority of 'other' responses is YouTube



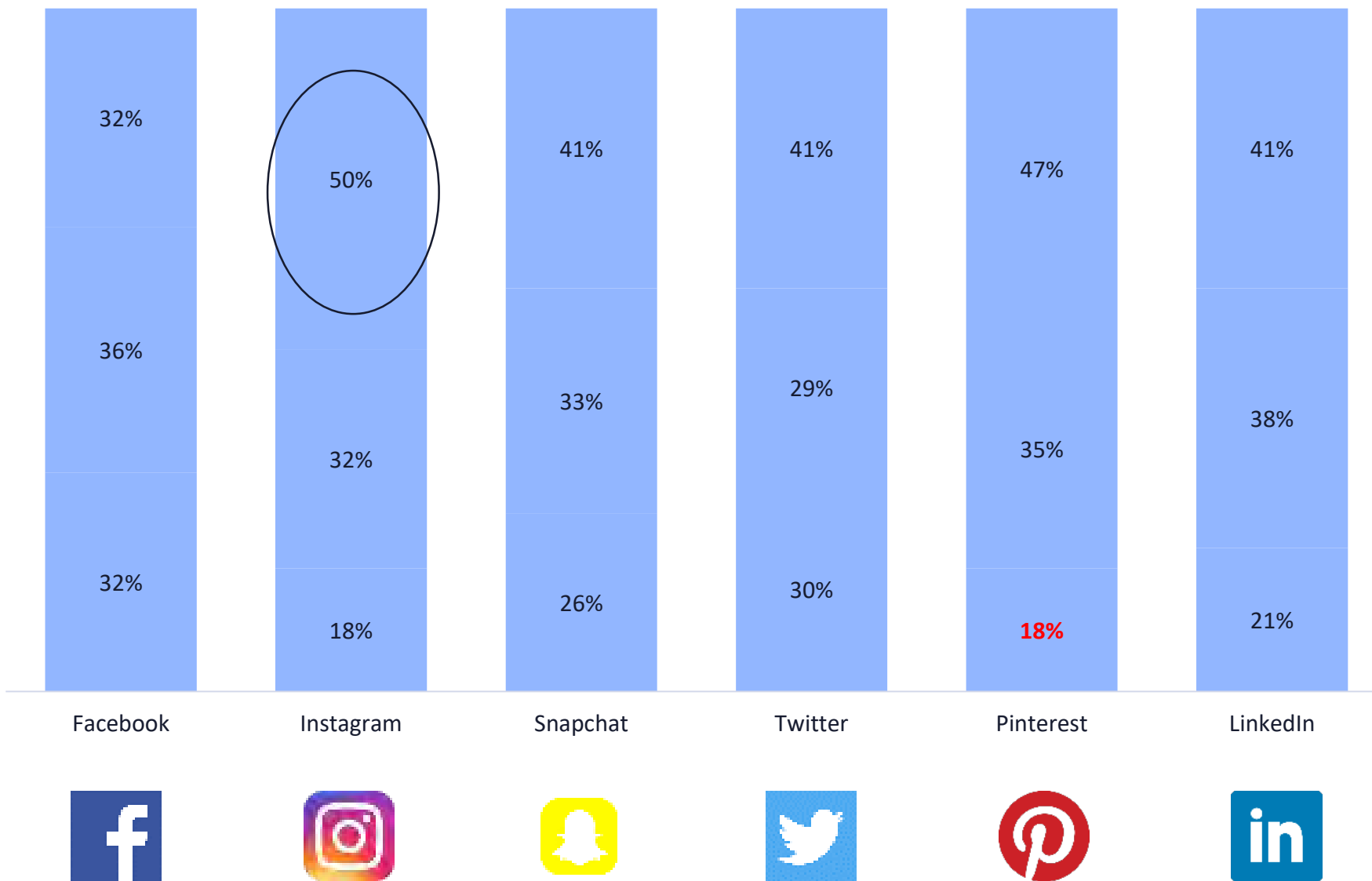
Base: Total boaters (n=701), Total anglers (n=988)
E4. Which of the following types of social media do you visit at least once per week?
Indexing to Total ≥ 120, ≤ 80

social media behavior

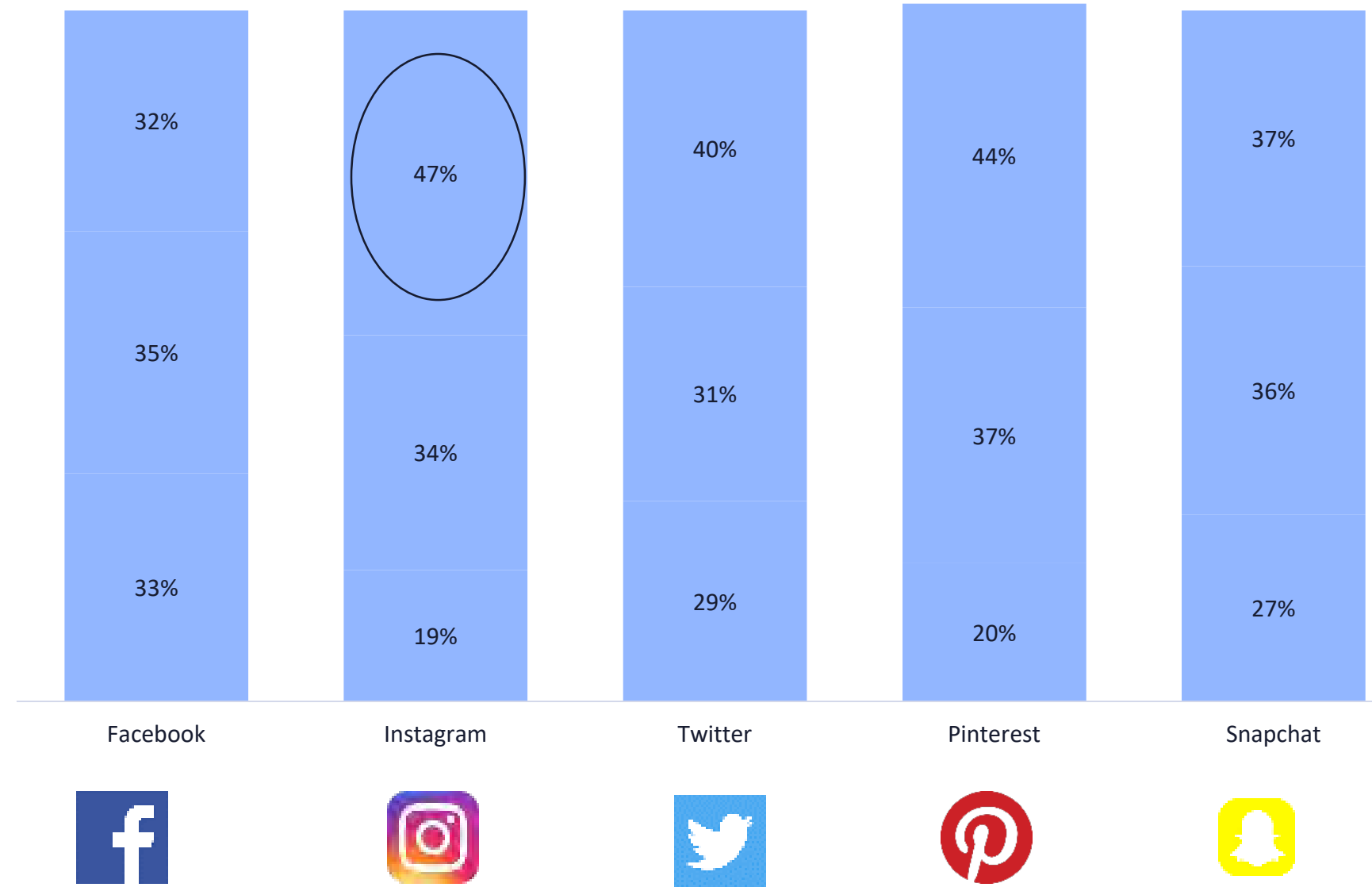
While Facebook engagement has generally been steady with increased participation offset by decreased participation, use of Instagram is growing – with nearly half of boaters and nearly half of anglers saying they are using it more often than year ago.

- Increased
- Remained same
- Decreased

BOATERS



ANGLERS

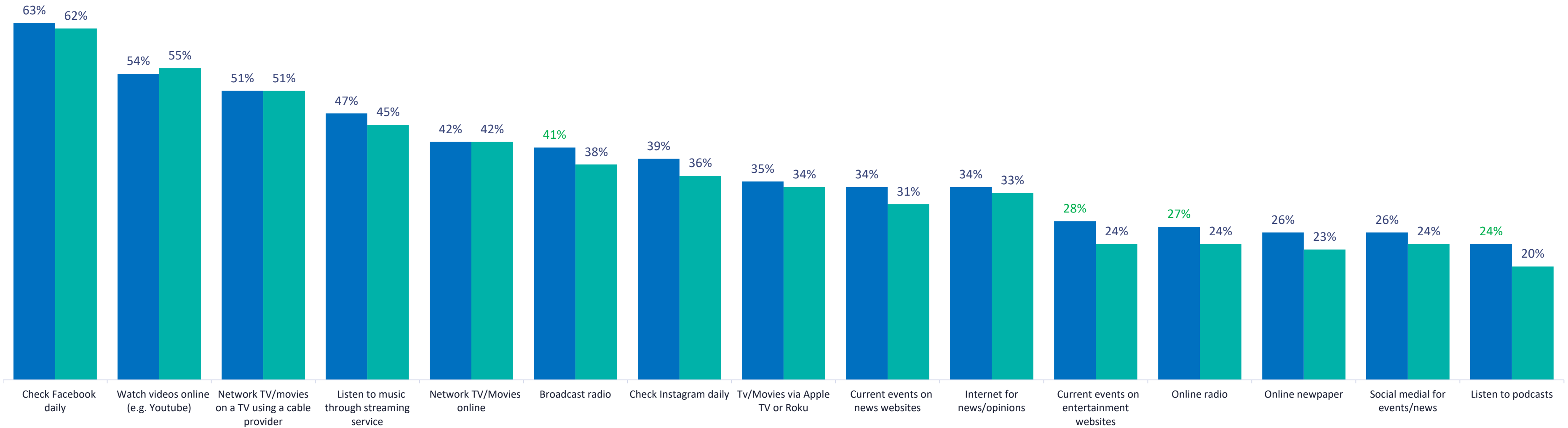


Shown based on E4 top 6 social media usage
 Base: Total boaters (n=701), Total anglers (n=988)
 E6. Would you say your engagement in each of the following has increased, decreased or remained the same over the past year? Select one for each.
 Indexing to Total ≥ 120, ≤ 80

media & communications behavior & habits

boaters
anglers

Yet, Facebook remains the top method to gather information about news or friends/family. Watching online/YouTube videos is also a top activity for anglers & boaters.

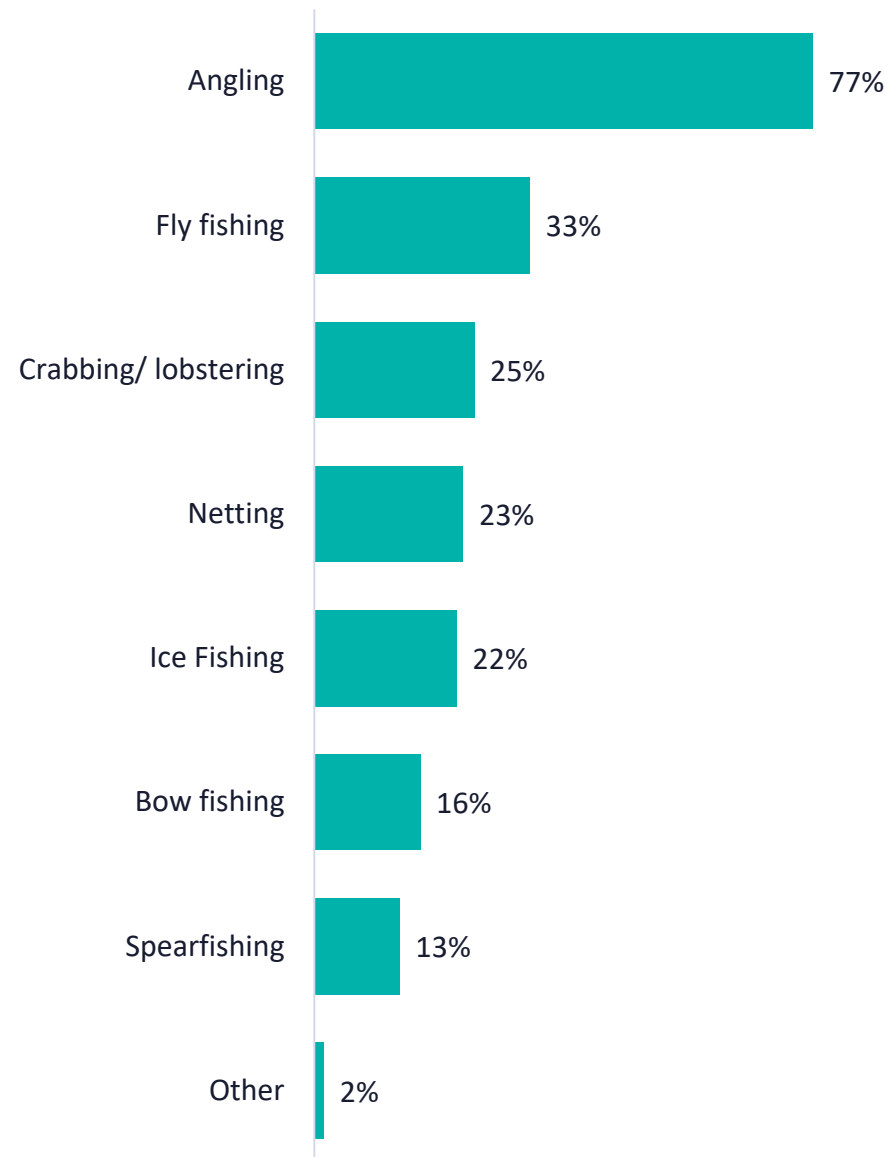


Top 15 stubs shown
 Base: Total boaters (n=701), Total anglers (n=988)
 E5. Which of the following describes how you watch TV, listen to music, keep up with your friends, or gather news information? Select all that apply?
 Indexing to Total $\geq 120, \leq 80$

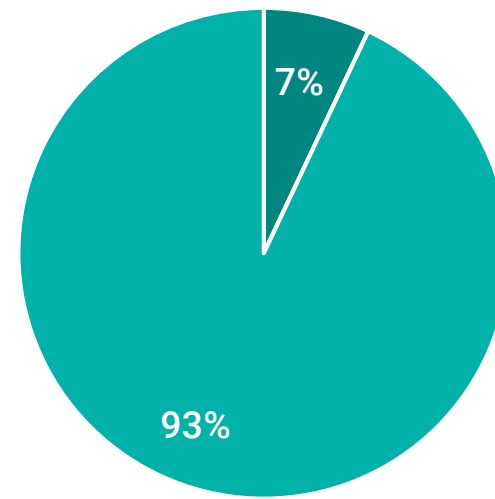
types of fishing by respondents

anglers are most likely to be participating in angling for leisure, though half participate to catch and release while the other half intend to keep to eat their catch. A variety of trips types are common, with day-getaways the most likely type.

TYPE OF FISHING

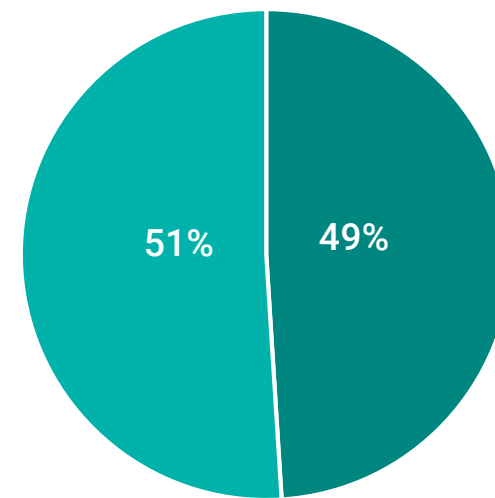


■ Sport ■ Leisure

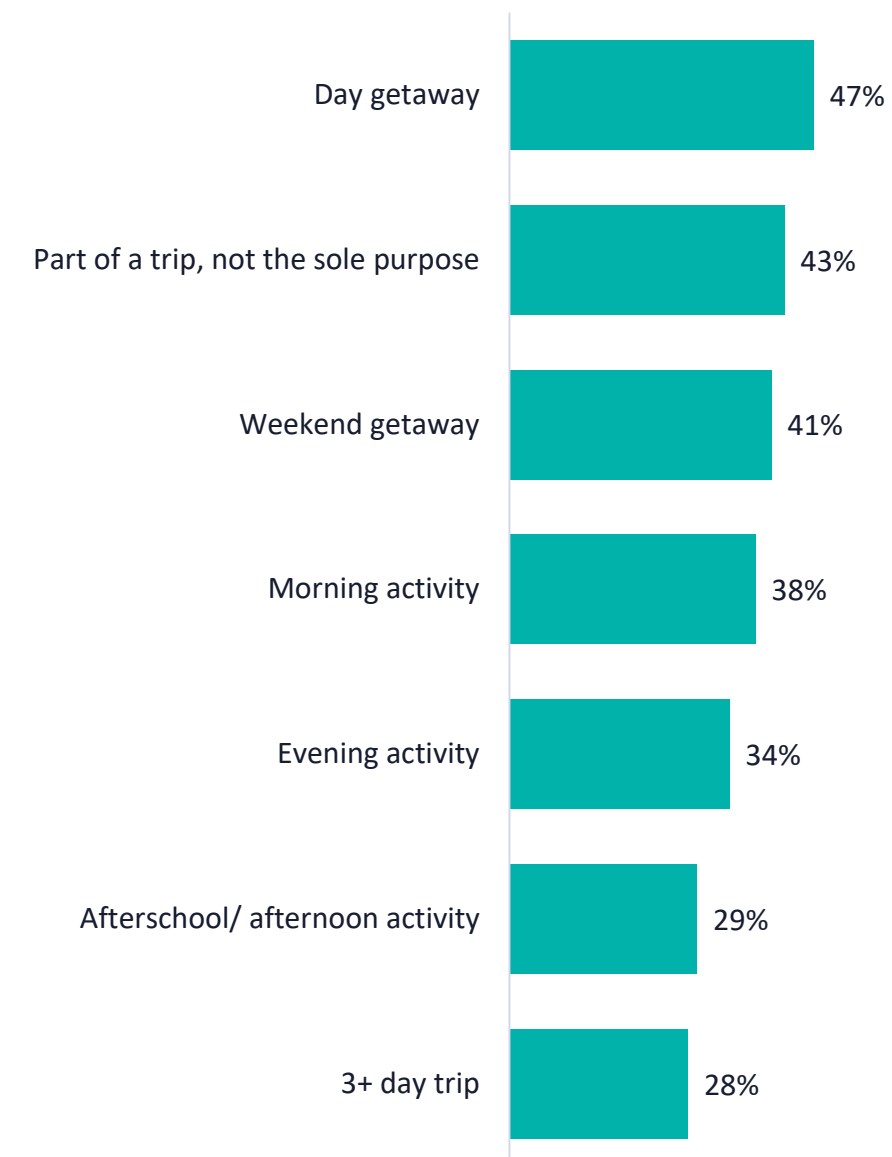


16% Consider themselves avid fishers

■ Catch & Release ■ Keep to eat



LENGTH OF FISHING TRIP

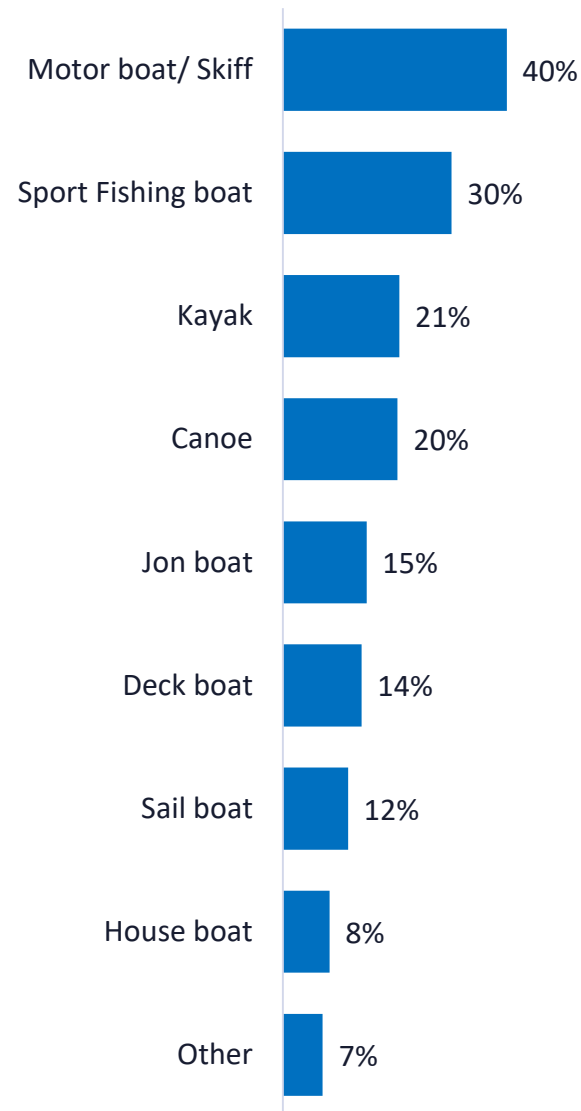


types of boating by respondents

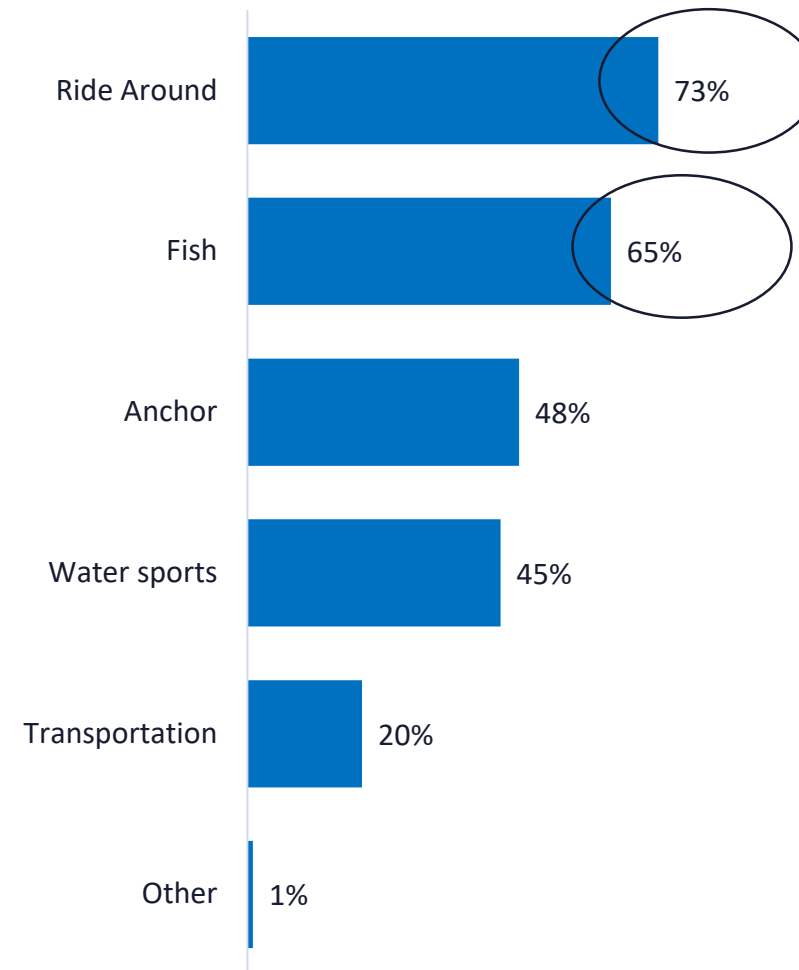
Just over one-third of boaters own their own boat, most typically a motor or sport fishing boat. For roughly two-thirds of boaters, fishing is a concurrent activity while boating.

38% Currently own boat

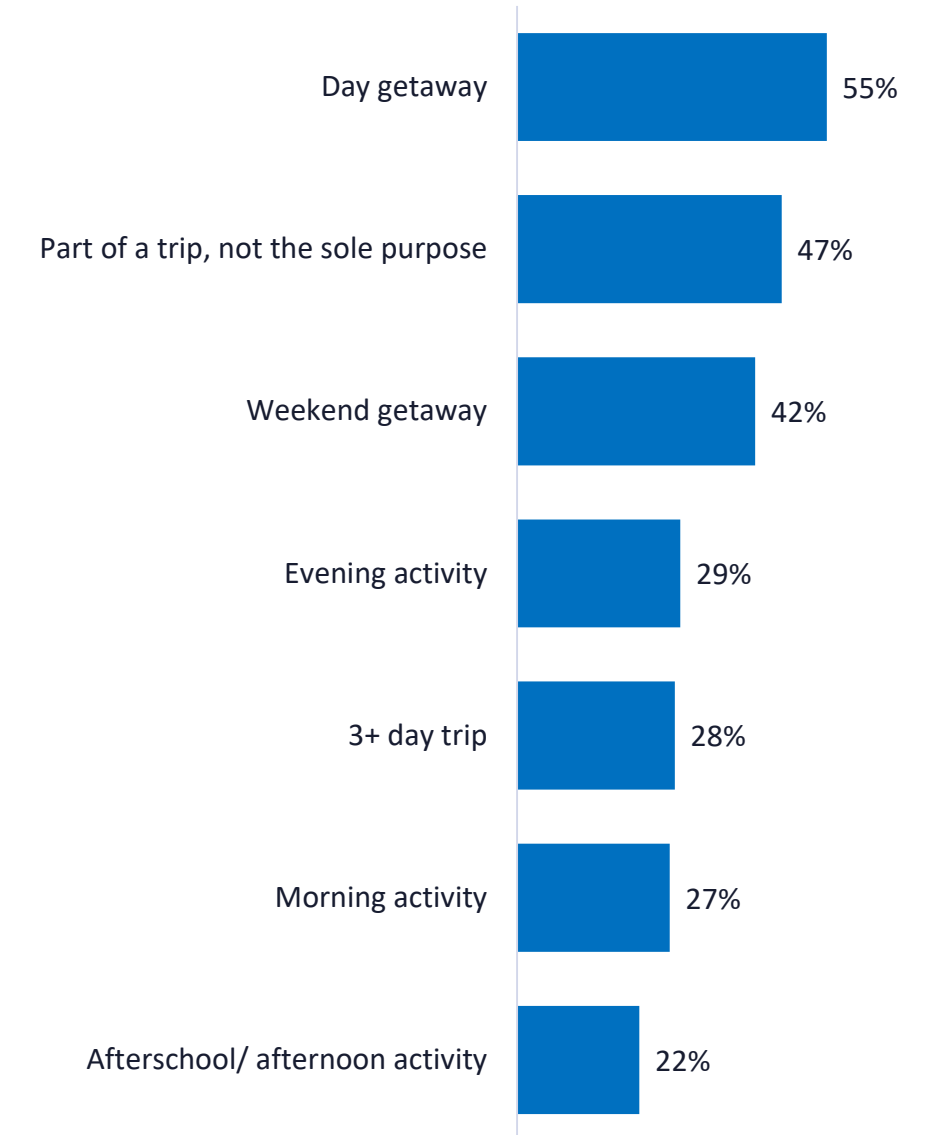
TYPE OF BOAT OWNED



ACTIVITY ON BOAT



REASON FOR BOATING



Base: Total boaters (n= 701); Owns boat (n=266)

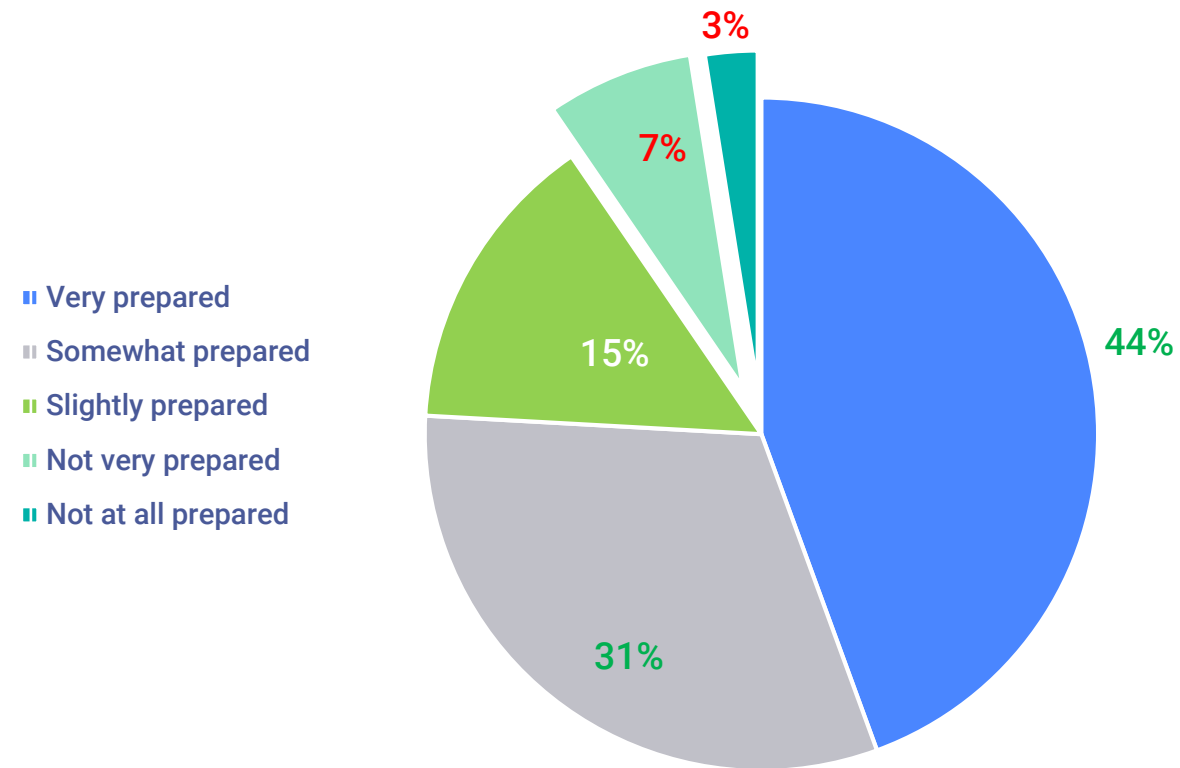
Q25. And, what do you do when you are on a boat? Select all that apply. | A6. For which of the following would you deem an appropriate reason to participate in each of the following activities? Select all that apply. | Q20. Do you currently own a boat? | Q21. What type of boat do you own? Select all that apply.

barriers to fishing

Most anglers & boaters feel prepared to fish or boat when the occasion arises. Competition with other outdoor activities and preferences to do other things are the top barriers to fishing and boating.

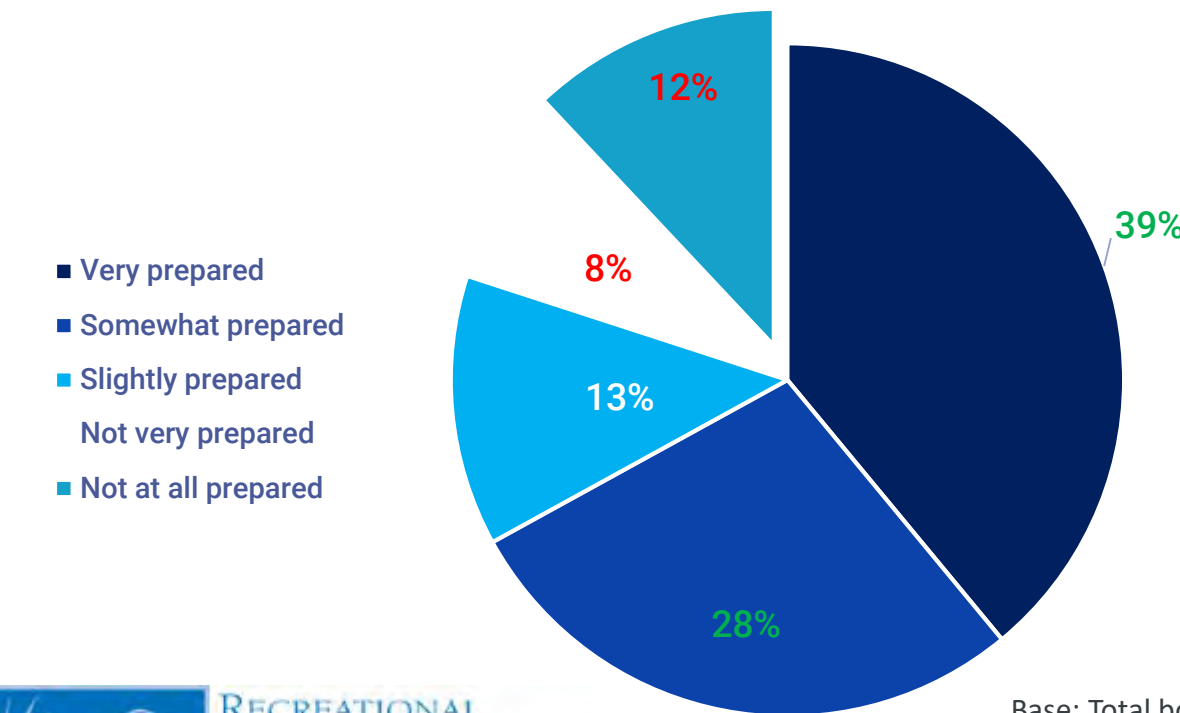
ANGLERS

LEVEL OF PREPAREDNESS TO FISH



10% Not very/ Not at all prepared

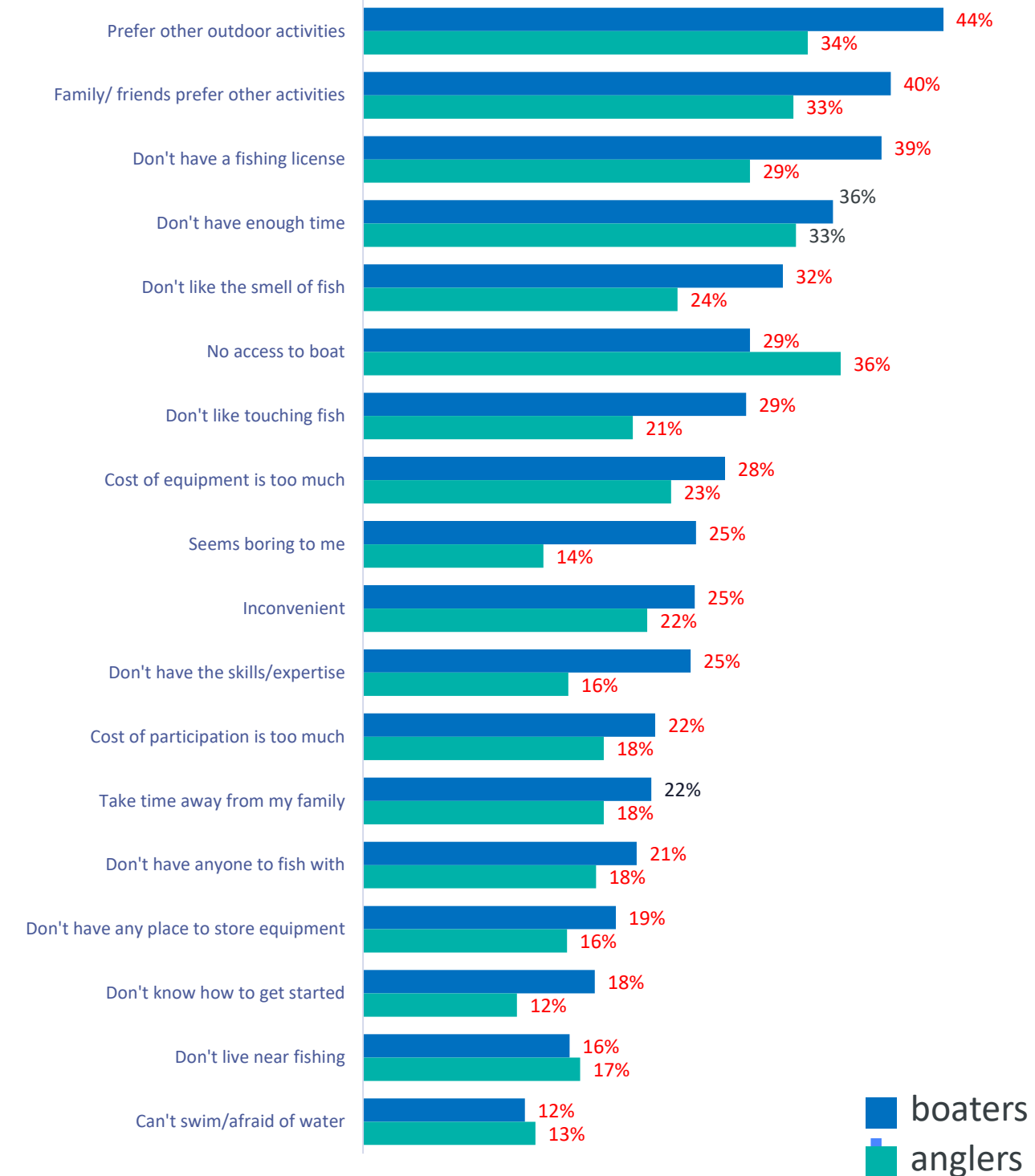
BOATERS



20% Not very/ Not at all prepared

BARRIERS TO FISHING PARTICIPATION

(Completely/ Somewhat Agree)



boaters anglers



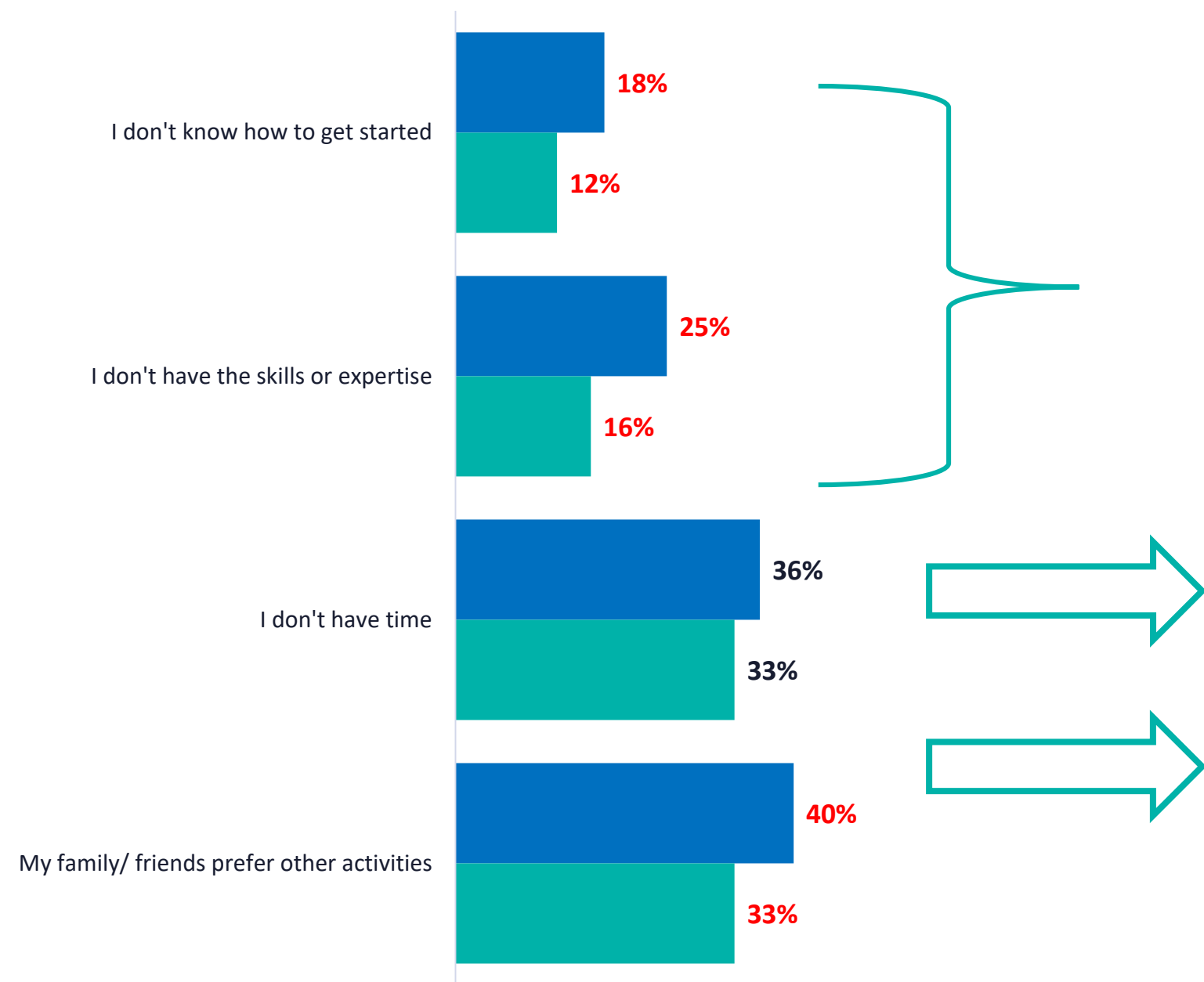
Base: Total boaters (n=701), Total anglers (n=988)
 Q30a. If you wanted to go fishing tomorrow, how prepared would you be? | Q30. Please tell us how much you agree with each of the following barriers as it pertains to your participating in fishing. Select one for each.
 Indexing to Total $\geq 120, \leq 80$

WHAT ARE THE BARRIERS TO FISHING?

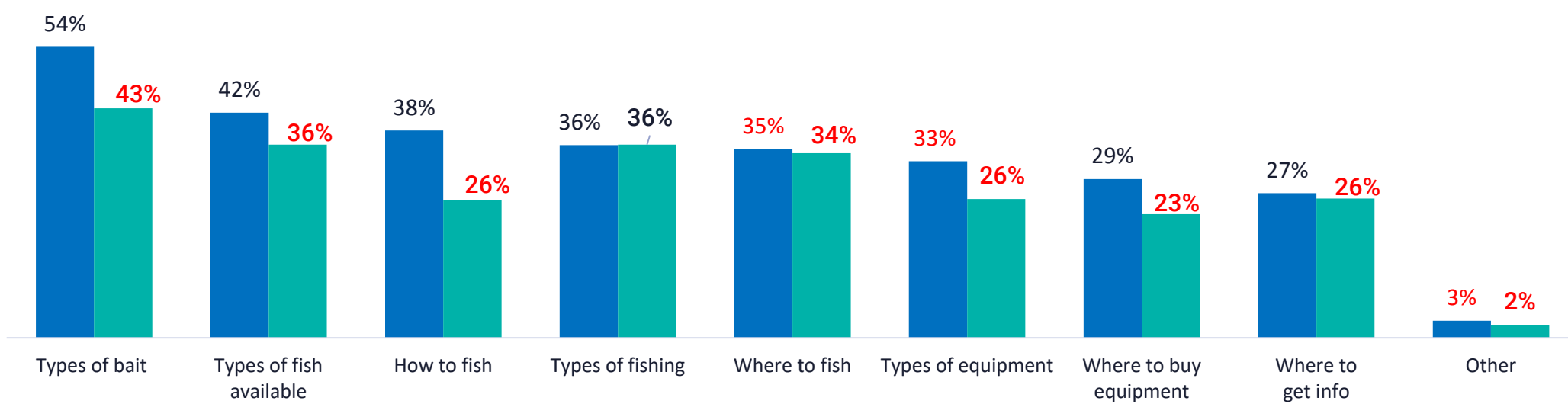
For those who don't know how to get started and a lack fishing skills, a variety of education topics can help from type of bait to use, type of fish available and types of fishing that can be done by location.

■ boaters
■ anglers

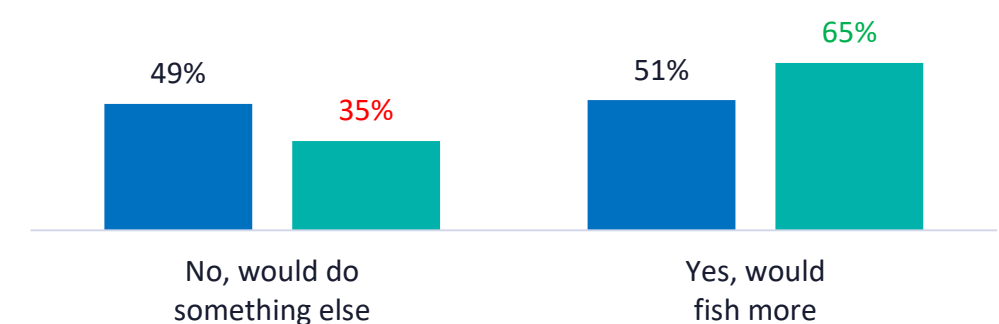
FISHING BARRIERS (Completely/ Somewhat Agree)



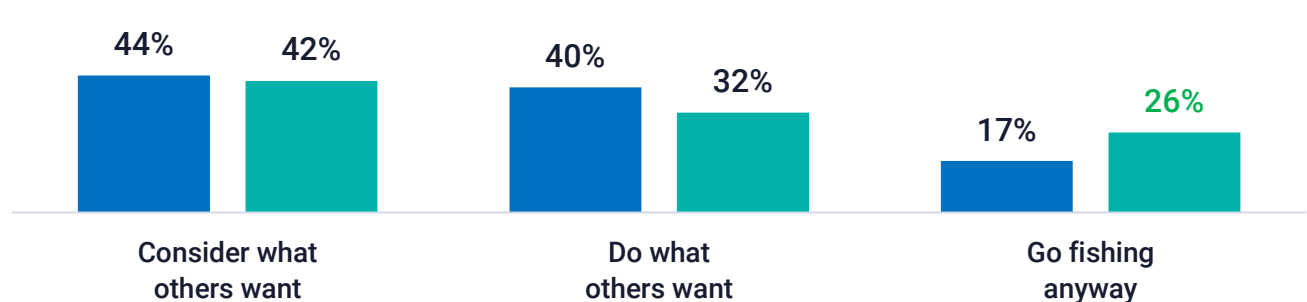
NEEDS TO LEARN ABOUT FISHING



FISH IF YOU HAD MORE TIME?



FISH OR DO WHAT OTHERS WANT?



Base: Total boaters (n=701), Total anglers (n=988)
 Q30. Please tell us how much you agree with each of the following barriers as it pertains to your participating in fishing. Select one for each. | Q31. What do you need to learn more about with regard to fishing and/or boating? | Q32. You mentioned that you don't have time to fish. If you had more time, is fishing something you would prioritize? Select one. | Q33. When you want to go fishing but your friends or family prefer to do something else, which of the following is true? Select one.
 Select all that apply. Indexing to Total ≥ 120, ≤ 80



Motivators for Fishing & Boating

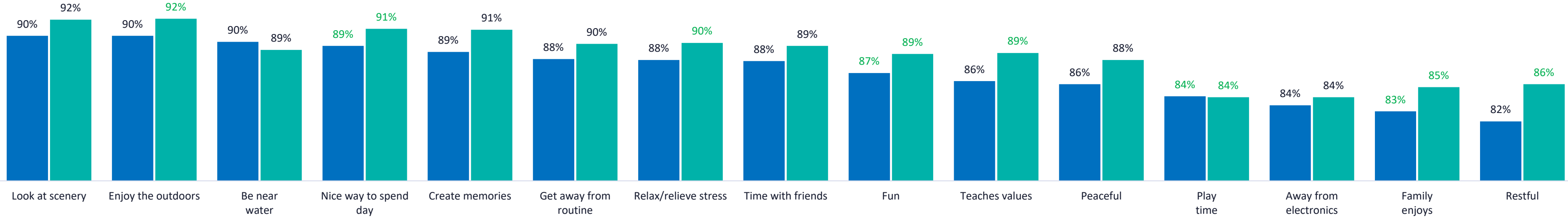
What are the current or potential motivations for boating/fishing?

why respondents are fishing & boating

Outdoor activities provide a variety of benefits to anglers and boaters, including a chance to enjoy the outdoors, be near water and look at the scenery around them. It's also considered a fun, social time and an opportunity to relax and relieve stress.

■ boaters
■ anglers

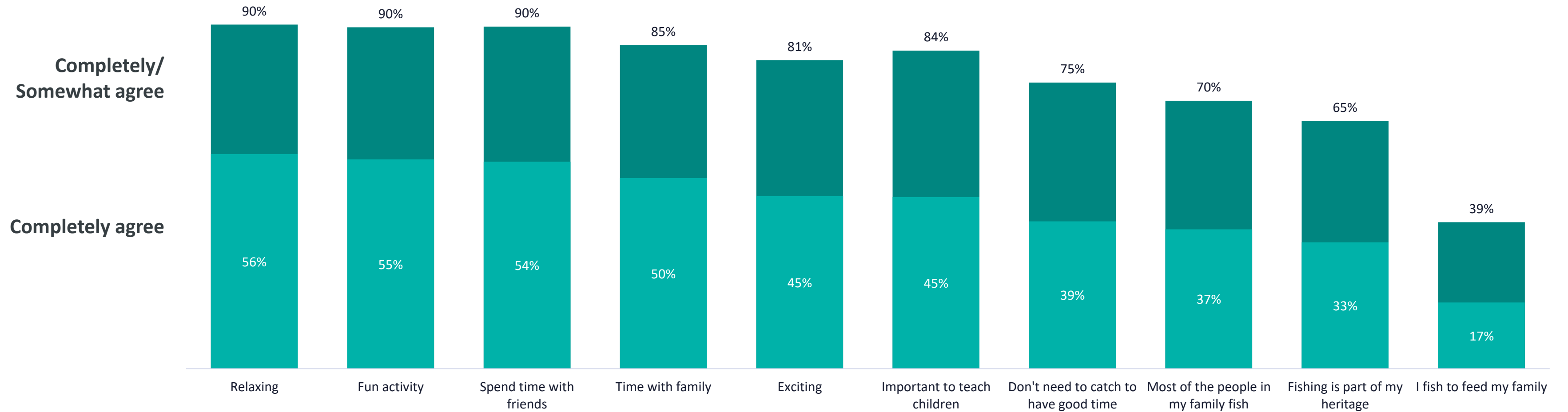
MOTIVATIONS FOR FISHING/BOATING *(Agree Completely/ Somewhat)*



Base: Total boaters (n=701), Total anglers (n=988)
 A3. Now, thinking specifically about what would be appealing to you about fishing/boating, please rate your agreement with each of the following statements.
 Indexing to Total $\geq 120, \leq 80$

Anglers consider the sport of fishing to be a fun way to spend time with family and friends. Interestingly, it's an activity that can provide benefits of both relaxation as well as excitement.

FISHING ATTRIBUTE AGREEMENT



explanation factor analysis

Fishing & boating are driven by motivations that allow participants to take a break from their everyday routine and enjoy the outdoors. Often, this coincides with a vacation or invitation from a friend or family member.

EXAMPLE: Motivation Factors (showing 3 of 10 factors)

A method of data reduction that analyzes the interrelationships (correlations) between attributes in order to identify the underlying dimensions, Factors.

The purpose of the analysis is to simplify the data by condensing the list of attributes into more manageable subsets.

ATTRIBUTES:

FACTORS:

- Takes me away from electronics
- To get away from my usual routine
- It makes me feel free of responsibility
- Gives me a feeling of control

BREAK FROM MY ROUTINE

- I like being near water
- I enjoy looking at the scenery
- It is a great way to enjoy the outdoors
- It is a nice way to spend a day

ENJOY OUTDOORS

- I typically do this only when someone invites me to
- I only do this when on a vacation and looking for an activity

**INVITATION/
VACATION ONLY**

factor details

outdoor activity motivations

RELAX & RECHARGE:

- It's restful
- It's peaceful
- It's relaxing
- Is a great way to relax/relieve stress
- I like the pace
- Helps me recharge
- To get some alone time

BOND WITH FAMILY/FRIENDS:

- It's something my family enjoys
- It's a good way to create memories
- It's a good way to spend time with friends
- Allows for some 'play time'
- It's fun

REWARDING/EDUCATIONAL:

- It teaches good values (Patience, respect for nature, etc.)
- It's rewarding

ENJOY OUTDOORS:

- I like being near water
- I enjoy looking at the scenery
- It's a great way to enjoy the outdoors
- It is a nice way to spend a day

VALUE FOR THE MONEY:

The value for the money

Other motivations to fish and boat include social bonding, adventure/excitement and the chance to relax and recharge.

PROVIDES A RUSH:

- I like the challenge
- I enjoy being competitive
- I like the adventure
- It's exciting
- It makes me feel invigorated
- To get exercise

IMPACTS MY IMAGE:

- It will allow me to grow my personal brand or image of being outdoorsy
- It will be great for my social media/ online presence

PART OF MY ROUTINE:

It's something I've always done

BREAK FROM MY ROUTINE:

- Takes me away from electronics
- To get away from my usual routine
- It makes me feel free of responsibility
- Gives me a feeling of control

INVITATION/VACATION ONLY:

- I typically do this only when someone invites me to
- I only do this when on a vacation and looking for an activity

The Segments

Who are anglers & boaters and
what is their activity & behavior?



people segments

introducing 6 distinct segments

UNCOMMITTEDS



These respondents are least interested in boating and fishing, and outdoors in general.

LUKEWARM OCCASIONALISTS

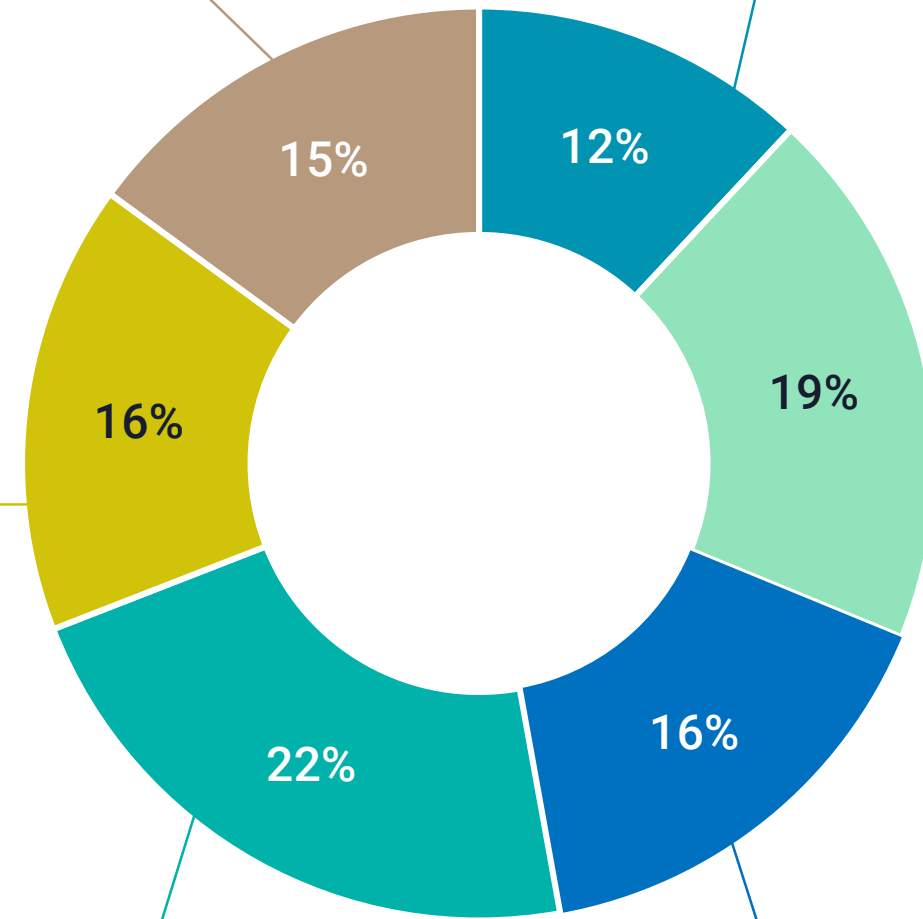


This segment has average or lower participation in outdoor activities with only average participation in fishing/boating – skewing to vacation times.

LEISURE-TIME ENJOYERS



This group enjoys leisurely outdoor activities where they can enjoy the scenery and relax. Fishing and boating are not as appealing to them as other activities.



AVID ADVENTURISTS



This group consists of adrenaline junkies and thrill seekers. Outdoor activities are part of their routine and they have a strong interest in boating and fishing as well as many other outdoor sports.

ACTIVE SOCIAL FAMILIES



This group is “up for anything” and like to be active, but they participate for social reasons, to spend time with family and to build their ‘brand’. They also have a strong interest in boating and fishing.

FAMILY-FOCUSED RELAXERS



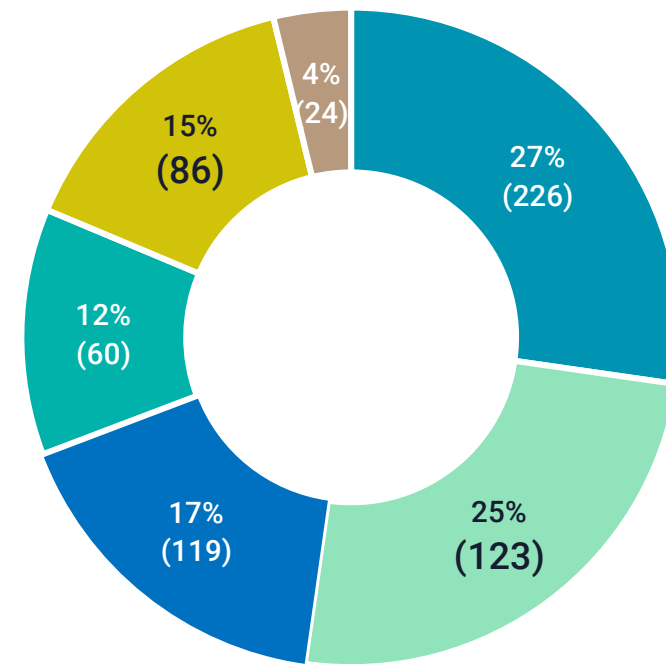
They enjoy less intense outdoor activities. They enjoy being outside, but more for the social aspects and spending time with family. Fishing and boating are a part of their outdoor activity repertoire.

people segments

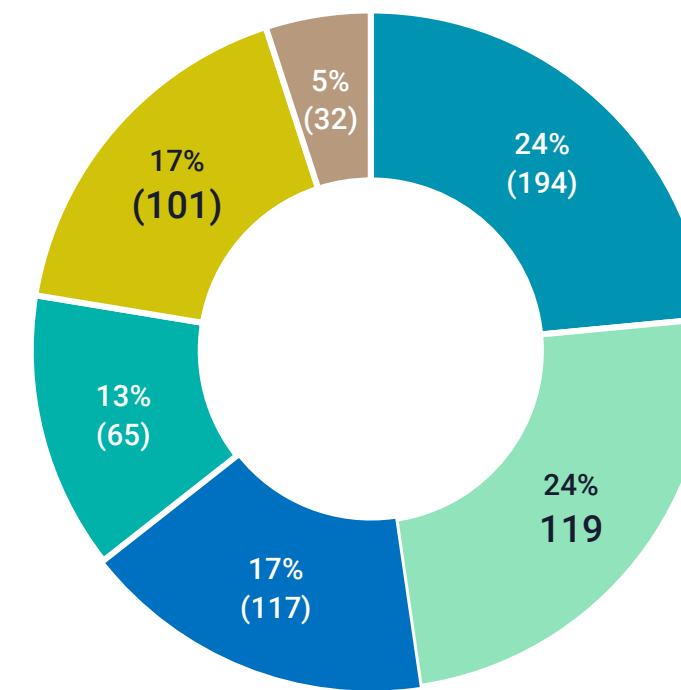
Anglers & boaters are primarily categorized in two segments – Avid Adventurists and Active Social Families.



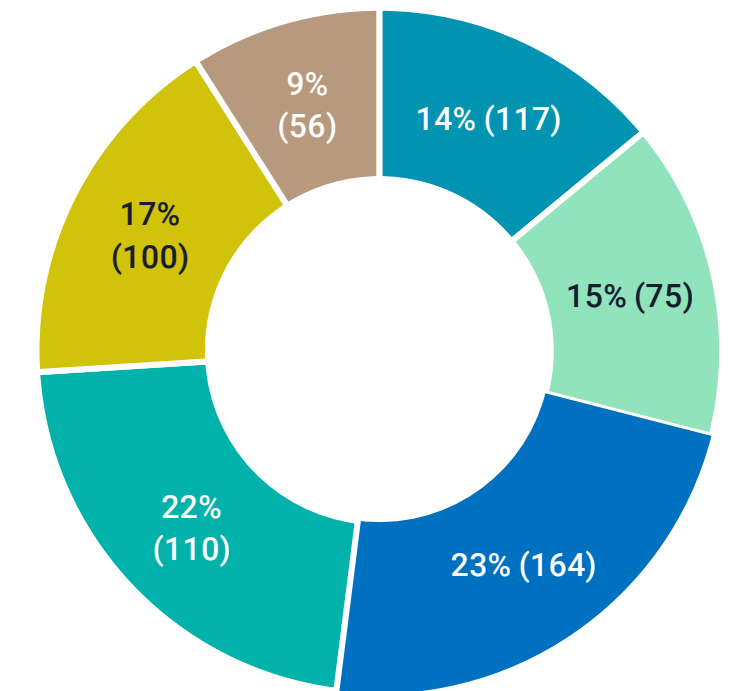
How boaters and anglers Are Categorized



BOATERS



ANGLERS



**ANGLERS
without a
License**

people segments

AVID ADVENTURISTS



12%

ACTIVE SOCIAL FAMILIES



19%

FAMILY-FOCUSED RELAXERS



16%

LEISURE-TIME ENJOYERS



22%

LUKEWARM OCCASIONALISTS



16%

UNCOMMITTEDS



15%

More likely to be:

Age Skew	No Skew	Young (18-34)	Older (45-54)	Older (45-54)	Young (18-34)	Older (45-54)
Mean HH Income	\$73,200	\$79,300	\$75,000	\$77,400	\$75,100	\$65,500
Kids in HH	49%	59%	53%	44%	53%	33%
Gender	No Skew	Male	Female	Female	Male	No Skew
Married	52%	60%	57%	53%	52%	44%
Higher Education (Bachelors Degree+)	39%	52%	42%	48%	52%	40%

AVID ADVENTURISTS



KEY THEMES:

- 1 Outdoor Enthusiasts – participate in activities to fuel their need for excitement and adventure
- 2 Very much enjoy fishing & boating and like to try new types
- 3 Strong interest in lots of different outdoor activities will present challenge for fishing & boating to continue to capture share of outdoor occasions.

OUTDOOR ACTIVITIES EVER PARTICIPATED

TOP PERCENTS

- Beach*
- Lake/ river*
- Fishing*
- Camping*
- Boating*
- Visit parks*

OUTDOOR ACTIVITY MOTIVATORS

- It's fun*
- It's a great way to enjoy the outdoors*/spend the day*
- I like the adventure*/the challenge*
- Exciting*/makes me feel invigorated*/recharged*
- Is a great way to relax/ relieve stress*
- It's a good way to create memories*

FISHING/BOATING MOTIVATIONS

TOP PERCENTS

- I enjoy looking at the scenery when fishing & boating.*
- I like being near water.*
- I like the adventure.*
- Fishing & boating is a great way to enjoy the outdoors.*
- Fishing & boating is fun*/a nice way to spend a day.*
- Fishing & boating is exciting*/helps recharge.*

WHO PARTICIPATE WITH (BOATING)

HIGHEST PERCENTAGE:

- Friends*
- Other family members*
- Significant other*
- My children

WHO PARTICIPATE WITH (FISHING)

- Other family members*
- Friends*
- Significant other
- My children
- Alone

FAMILY-FOCUSED RELAXERS



KEY THEMES:

- 1 Enjoy the outdoors/family time by participating in more relaxed, laid-back activities.
- 2 Benefits from fishing & boating are about spending time with family and not necessarily about the sport (they don't need to catch a fish to have fun).
- 3 Fishing & boating tend to be more seasonal in nature, likely reflecting the business of family life.

OUTDOOR ACTIVITIES EVER PARTICIPATED

TOP PERCENTS

- Beach*
- Lake/ river*
- Visit parks*
- Picnicking*
- Camping*
- Fishing*

OUTDOOR ACTIVITY MOTIVATORS

- It's a great way to enjoy the outdoors*
- It's fun*
- It is a nice way to spend a day*/peaceful*
- It's a good way to create memories*
- I enjoy looking at the scenery*
- It is a great way to relax/relieve stress*
- Teaches good values*

FISHING/BOATING MOTIVATIONS

TOP PERCENTS

- I like being near water.*
- I enjoy looking at the scenery when fishing/boating.*
- Fishing/boating is a great way to enjoy the outdoors.*
- Fishing/boating is a good way to create memories.*
- Fishing/boating will help me get away from my usual routine.*

WHO PARTICIPATE WITH (BOATING)

HIGHEST PERCENTAGE:

- Other family members*
- Friends*
- Significant other*
- My children

WHO PARTICIPATE WITH (FISHING)

- Other family members*
- Significant other*
- My children
- Friends

ACTIVE SOCIAL FAMILIES



KEY THEMES:

- 1 Enjoy the outdoors and being active w/ friends and family. Get a variety of benefits from outdoor activities.
- 2 Enjoy and show strong interest in fishing & boating. Part of their heritage.
- 3 Are 'all in' when it comes to social media and an important benefit of any outdoor activity is to post it as part of building their personal 'brand'.

OUTDOOR ACTIVITIES EVER PARTICIPATED

TOP PERCENTS

- Beach*
- Fishing*
- Camping*
- Lake/river*
- Running/ jogging*
- Boating

OUTDOOR ACTIVITY MOTIVATORS

- It's a great way to enjoy the outdoors*/spend the day*
- It's fun*/a good way to create memories*
- It's relaxing*
- It's a good way to spend time with friends*
- Great for my social media presence*/allows me to grow my personal brand of being 'outdoorsy.*'

FISHING & BOATING MOTIVATIONS

TOP PERCENTS

- I enjoy looking at the scenery when fishing & boating.*
- Fishing & boating is a nice way to spend a day.*
- Fishing & boating is a great way to enjoy the outdoors.*
- I like being near water.*
- Fishing & boating takes me away from electronics.*
- Great for my social media presence.*
- Makes me feel invigorated.*

WHO PARTICIPATE WITH (BOATING)

HIGHEST PERCENTAGE:

- Friends*
- Other family members
- Significant other
- My children

WHO PARTICIPATE WITH (FISHING)

- Friends
- Other family members
- Significant other
- My children

LEISURE-TIME ENJOYERS



OUTDOOR ACTIVITIES EVER PARTICIPATED

- TOP PERCENTS
- Beach*
 - Lake/River*
 - Visit parks*
 - Fishing*
 - Picnicking*
 - Camping*

OUTDOOR ACTIVITY MOTIVATORS

- I enjoy looking at the scenery*
- It's a good way to create memories*
- It's a nice way to spend a day*
- It's a great way to enjoy the outdoors*
- I like being near water*
- It's fun*

FISHING/BOATING MOTIVATIONS

- TOP PERCENTS
- I like being near water.*
 - I enjoy looking at the scenery when fishing & boating.
 - Fishing/boating is a great way to enjoy the outdoors.
 - Fishing & boating is a nice way to spend a day.
 - Fishing & boating is a good way to create memories.
 - Fishing & boating will help me get away from my usual routine.

WHO PARTICIPATE WITH (BOATING)

- HIGHEST PERCENTAGE:
- Other family members*
 - Significant other*
 - Friends
 - My children

WHO PARTICIPATE WITH (FISHING)

- Other family members
- Significant other
- My children
- Friends

KEY THEMES:

- 1 Aren't particularly fond of the outdoors. When they do go outside, they like to "take it easy".
- 2 Less interested in fishing & boating. There are a variety of strong barriers keeping them from fishing, which speaks to their overall lack of interest.
- 3 Lack of interest in physical activity as well.

*Strongest skews over 50%+ agree
Green indicates over index versus total
Red indicates under index versus total

LUKEWARM OCCASIONALISTS



OUTDOOR ACTIVITIES EVER PARTICIPATED

- TOP PERCENTS
- Beach*
 - Fishing*
 - Camping*
 - Lake/River*
 - Visit parks
 - Biking
 - Running/jogging

OUTDOOR ACTIVITY MOTIVATORS

- No strong outdoor motivations (above 30% agree).

KEY THEMES:

- 1 Have average or below average interest in many outdoor activities.
- 2 Average interest in fishing & boating, but they aren't self-motivated –they tend to fish or boat more so when invited by a friend or family member.
- 3 Don't exhibit strong barriers to fishing, don't receive positive benefits from it, consistent with their more occasional fishing & boating behavior.

FISHING/BOATING MOTIVATIONS

- TOP PERCENTS
- No strong fishing/boating motivations (above 30% agree).

WHO PARTICIPATE WITH (BOATING)

- HIGHEST PERCENTAGE:
- Friends*
 - Other family members
 - Significant other
 - My children

WHO PARTICIPATE WITH (FISHING)

- Other family members
- Friends
- Significant other
- My children

people segments

UNCOMMITTEDS 15%

UNCOMMITTEDS



KEY THEMES:

- 1 Are least interested in outdoor activities and least interested in fishing & boating.
- 2 Are least likely to get enjoyment out of fishing & boating. As a result, it would be very difficult to attract this group.

OUTDOOR ACTIVITIES EVER PARTICIPATED

MORE LIKELY

- Beach*
- Lake/River
- Fishing
- Visit parks
- Camping
- Picnicking

OUTDOOR ACTIVITY MOTIVATORS

- No strong outdoor motivations (above 30% agree).

FISHING/BOATING MOTIVATIONS

MORE LIKELY

- No strong fishing/boating motivations (above 30% agree)

WHO PARTICIPATE WITH (BOATING)

HIGHEST PERCENTAGE:

- Other family members
- Friends
- Significant other

WHO PARTICIPATE WITH (FISHING)

- Other family members
- Friends
- Significant other

Target Segments

Which Segments Offer the Best Opportunity?



brand strategy & opportunities





How we determined who to target

- 1 **Interest and Enjoyment of Fishing & Boating?**
 - How interested are they in the activities and do they enjoy fishing/boating?
- 2 **Desirable Fishing & Boating Behaviors and Represent Attractive Potential**
 - How many current anglers/boaters comprise each segment, what is the growth potential from new users or increased frequency?
- 3 **Desirable Fishing & Boating Attitudes**
 - What emotional benefits do they receive from fishing/boating and can these be leveraged?
- 4 **Size of the Growth Prize**
 - How many MMs of people in the segment could be converted to new fishing & boating participants?

brand strategy & opportunities

Who we should target and why

	Primary Target ACTIVE SOCIAL FAMILIES 	Secondary Targets AVID ADVENTURISTS 	FAMILY-FOCUSED RELAXERS 
Interest and Enjoyment of Fishing & Boating	 Strong enjoyment and interest in fishing & boating.	 Strong enjoyment and interest in fishing & boating.	 Average enjoyment in boating and fishing and above average interest in boating in future.
Have Desirable Fishing & Boating Behaviors and Represent Attractive Potential	 Above average incidence of anglers (41%) and boaters (30%). Above average frequency combined with larger segment size contribute to strong share of boating & fishing occasions – but room to grow new participants given incidence.	 Highest incidence of fishers (65%) and boaters (53%) and highest frequency create strong share of occasions – but relatively fewer new participants to develop given high incidence and smaller segment size. However, opportunity to grow less common fishing types – e.g. fly and ice.	 Above average incidence in fishing (40%) & boating (28%) and average frequency. Opportunity to grow both users and frequency.
Have Desirable Attitudes Relative to Fishing & Boating	 Get a variety of emotional benefits from fishing & boating – from fun, challenging and competitive to restful and a way to recharge – PLUS it looks great for their personal ‘brand’ and social media presence.	 Get strong emotional benefits from fishing & boating but their interest in trying new things and lots of other outdoor activities will make it harder for fishing/boating to compete for share of time.	 Get strong emotive benefits of relaxation and social time with family friends – opportunity to leverage fishing/boating as relaxation.
Size of the Growth Prize	10.3 MM Anglers, 7.5 MM Boaters 14.8 MM Potential <u>New</u> Anglers 17.6 MM Potential <u>New</u> Boaters	10.3 MM Anglers, 8.4 MM Boaters 5.5 MM Potential <u>New</u> Anglers 7.4 MM Potential <u>New</u> Boaters	8.5 MM Anglers, 5.9 MM Boaters 12.7 MM Potential <u>New</u> Anglers 15.2 MM Potential <u>New</u> Boaters

brand strategy & opportunities

Who we should not target and why



LEISURE-TIME ENJOYERS












LUKEWARM OCCASIONALISTS



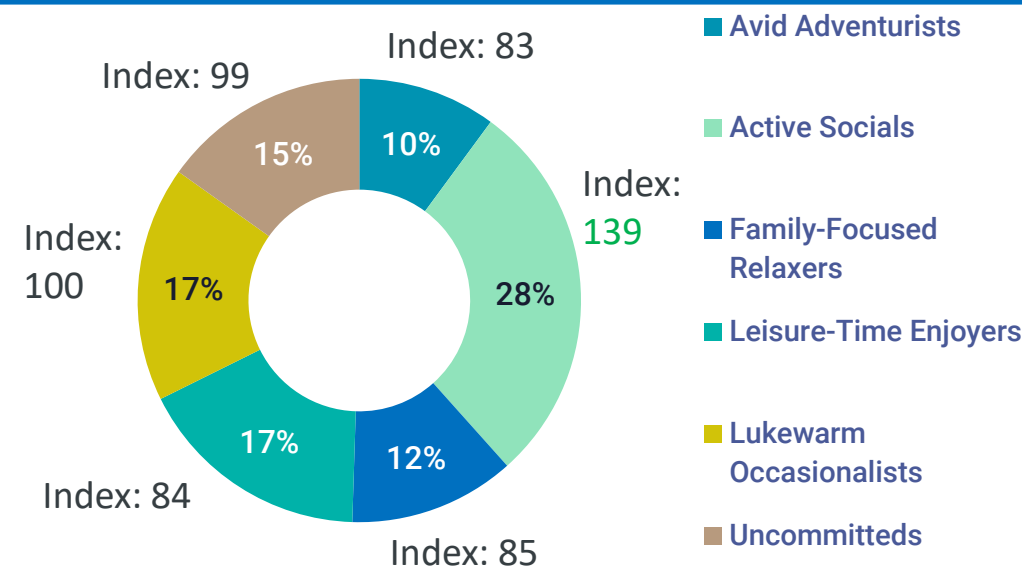
UNCOMMITTEDS



Interest and Enjoyment of Fishing & Boating	 Below average interest and enjoyment of fishing & boating	 Below average enjoyment of fishing/boating. Below average interest in future boating, average interest in future fishing	 Below average interest and enjoyment of fishing & boating
Have Desirable Fishing & Boating Behaviors and Represent Attractive Potential	 Below average incidence and frequency of fishing & boating.	 Average incidence and frequency of fishing/boating.	 Below average incidence and frequency of fishing & boating.
Have Desirable Attitudes Relative to Fishing & Boating	 No strong motivations to go fishing or boating. They do like being near the water but this segment prefers beach activities.	 No strong self-motivations to fish or boat. Typically more driven by an invitation to go with someone else or vacation.	 No strong motivations or benefits that compel them to go fishing & boating.
Size of the Growth Prize	6.1 MM Anglers, 4.4 MM Boaters 22.9 MM Potential <u>New</u> Anglers, 24.7 MM Potential <u>New</u> Boaters	6.8 MM anglers, 4.4 MM Boaters 14.4 MM Potential <u>New</u> anglers, 16.7 MM Potential <u>New</u> Boaters	2.2 MM anglers, 1.2 MM Boaters 17.6 MM Potential <u>New</u> Anglers 18.6 MM Potential <u>New</u> Boaters

Overall, Hispanics have below average incidence of anglers and boaters – however they have a strong skew to Active Social Families, the primary marketing target. Hispanics in this segment represent an attractive opportunity.

DISTRIBUTION ACROSS SEGMENTS



HEALTH & LIFESTYLE ATTITUDES *(Completely agree)*

Important to continue learning new things
 Family and friends are a top priority in my life
 Important to have time to myself
 Opinions of my family members are important to me
 Family has an impact on the choices I make
 I like trying new things
I love the idea of a big family

VIEWS & OVERALL LIFESTYLE ATTITUDES *(Completely agree)*

I'm always looking for ways to save money
 Think I'll be better off financially in five years
 People are too dependent on the internet
Willing to pay for products & services that make life easier
 A "good value" goes beyond prices
Get great deal of info from social media
 Check social media several times throughout the day

OUTDOOR ACTIVITY INTEREST *(Very interested)*

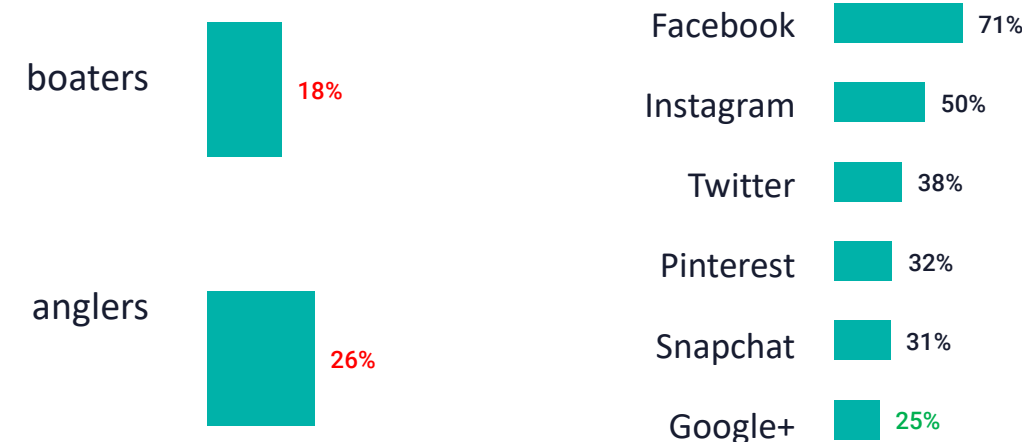
Going to the beach
 Visiting state/national parks
 Going to lake/ river
 Picnicking
 Boating
 Hiking
 Camping
 Gardening

OUTDOOR ACTIVITY ENJOYMENT *(Enjoy extremely)*

Paddle boarding
 Four wheeling
 Tailgating
 Going to the beach
 Motorcycling
 Water skiing/water sports
 Jet skiing
 Snowmobiling

BOATERS/FISHERS

SOCIAL MEDIA USED



AGE

18%	30%	26%	26%
18-24	25-34	35-44	45-54

GENDER: 50% Female / 50% Male

INCOME (mean): \$64.7K

% MARRIED: 50%

KIDS IN HH: 57%

% HIGHER EDUCATION: 40%

Green indicates over index versus total
 Red indicates under index versus total

OUTDOOR ACTIVITY MOTIVATIONS *(Agree completely)*

Peaceful
 Great way to relax/relieve stress
 Good way to create memories
 Fun
 Nice way to spend a day
 Great way to enjoy the outdoors
 Get away from my usual routine

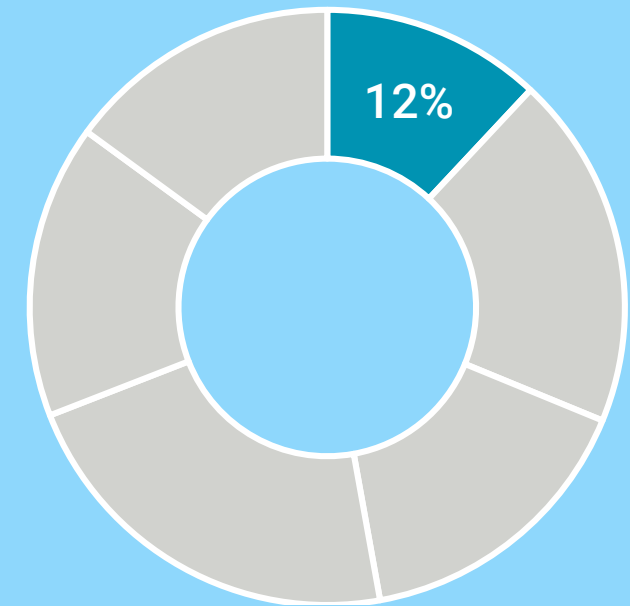
PHYSICAL ACTIVITIES/ HOBBIES

Cooking
 Going to movies
 Traveling for pleasure
 Working out at the gym
 Reading fiction
 Running
 Playing video games

TARGETING

Internet browsing	84%	Watch videos online Check Facebook daily Check Instagram daily
Listening	80%	Listen to music through streaming device Listen to broadcast radio Listen to online radio Listen to social media for news/current events
TV	79%	Watch TV/movies using cable provider Watch TV/movies online Watch TV/movies on apple TV or Roku
Reading	63%	Read about current events on news websites Read a newspaper online Read about current events on entertainment websites

TARGET SEGMENT: AVID ADVENTURISTS



KEY THEMES:

- 1** *They are outdoor enthusiasts and enjoy participating in a variety of outdoor activities and sports – typically to fuel their need for excitement and adventure.*
- 2** *They very much enjoy both fishing & boating (and often combine the two) and like to try new types (fly fishing, ice fishing, sport fishing).*
- 3** *Their strong interest in lots of different outdoor activities will present a challenge for fishing & boating to continue to capture their share of outdoor occasions.*



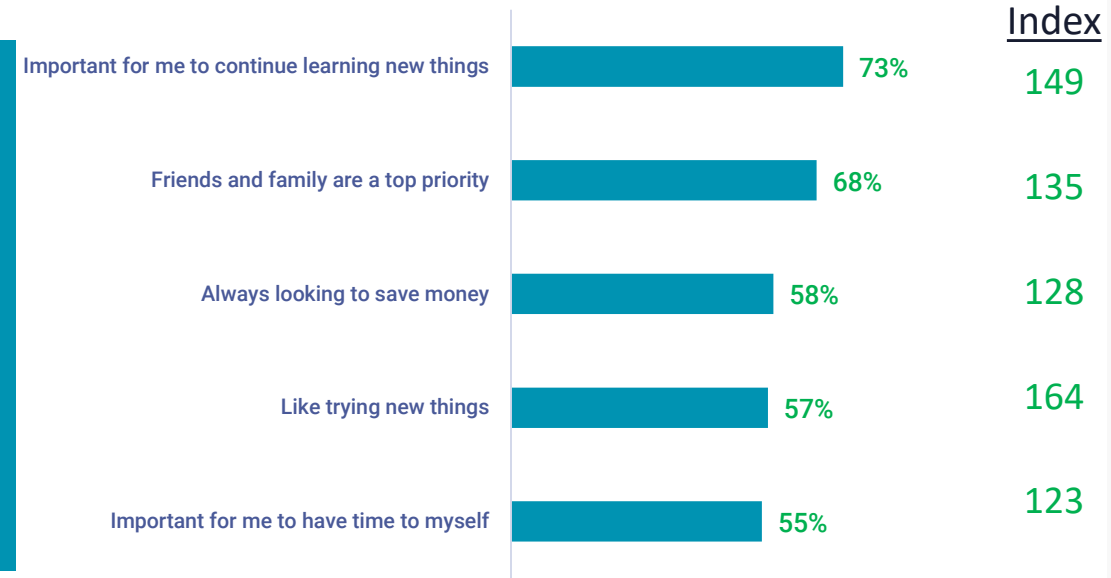
AVID ADVENTURISTS

Avid Adventurists love the outdoors and enjoy participating in a wide variety of outdoor activities, including boating and fishing, in which they frequently participate. Their broad interest in various activities stems from a strong desire to learn and try new things.

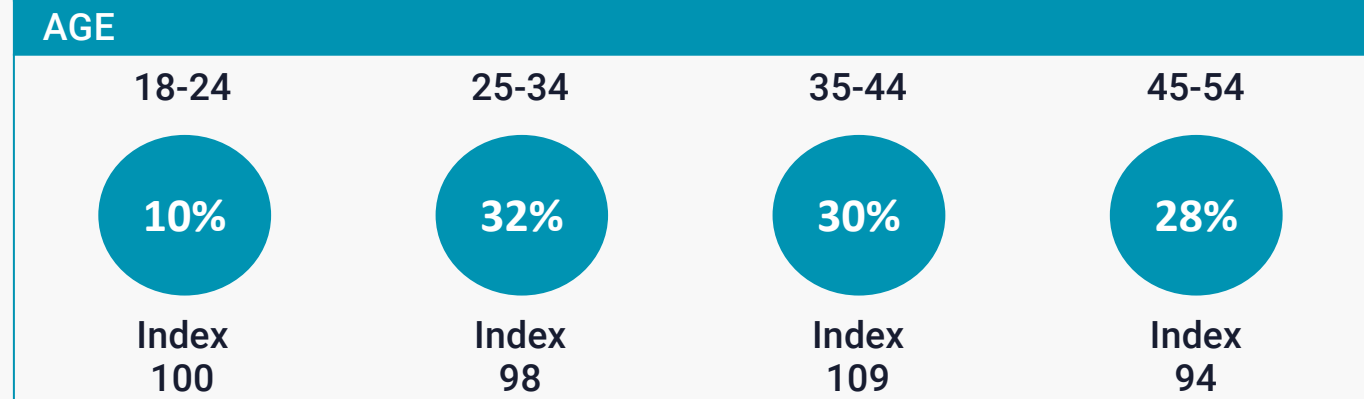


SEGMENT SIZE
(% OF PEOPLE)
12%

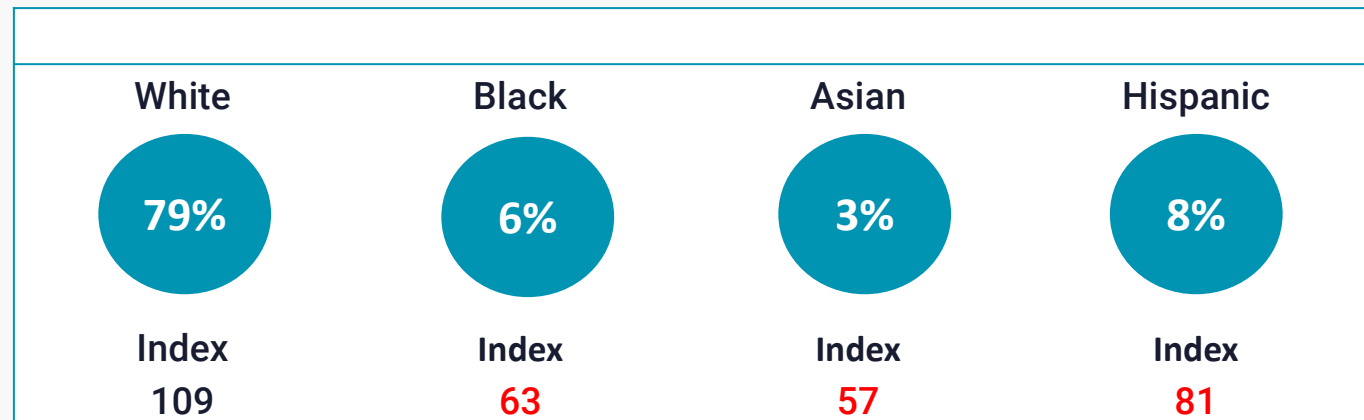
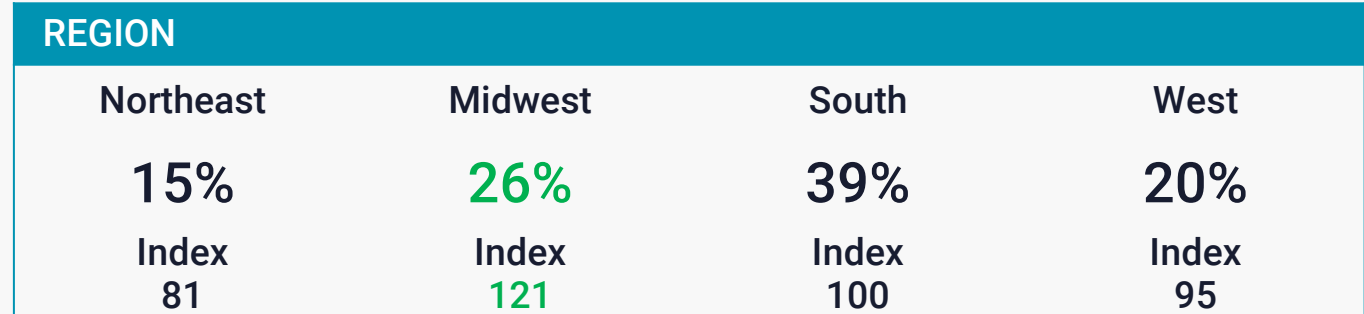
TOP ATTITUDES



DEMOGRAPHICS



	Index
GENDER	46% Male/54% Female 109/93
INCOME (mean)	\$73,200 98
MARITAL STATUS	52% Married 98
HH SIZE (mean)	3.0 99
CHILDREN IN HH	49% 100



OUTDOOR ACTIVITY

Only Top Responses Shown

OUTDOOR ACTIVITY ENJOYMENT

Enjoy extremely

Activity	Percentage	Index
Lake/ river	66%	157
Beach	65%	126
Camping	61%	193
Visit parks	59%	159
Four-wheeling	53%	145
Boating	53%	153
Hiking	51%	175
Wildlife/ bird watching	50%	140
Canoeing or kayaking	50%	178
Fishing	49%	185
Hunting	49%	147
Target shooting	46%	139

OUTDOOR ACTIVITY INTEREST

Very interested

Activity	Percentage	Index
Lake/ river	81%	162
Beach	78%	127
Visit parks	73%	150
Camping	71%	195
Fishing	61%	191
Boating	61%	177
Picnicking	59%	150
Hiking	57%	178
Canoeing or kayaking	53%	196
Gardening	52%	157
Tailgating	46%	150
Wildlife/ bird watching	46%	169

BOATERS

5.7

Avg. # times boat per year

53%

Index 221

Index 159

ANGLERS

8.7

Avg. # times fish per year

65%

Index 195

Index 186

ANGLERS & BOATERS

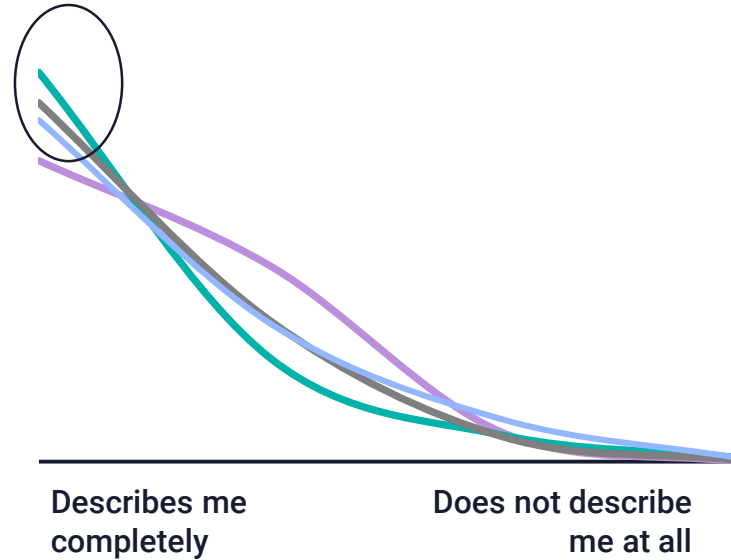
45%

Index 272

Green indicates over index versus total
Red indicates under index versus total

AVID ADVENTURISTS

Avid Adventurists consider themselves to be outdoor enthusiasts and enjoy both the adventure and the social benefits that outdoor activities give them. In addition to outdoor adventure activities, they are also strongly engaged in a variety of physical fitness activities.



Don't consider myself an "avid outdoorsman"
 Mean 2.2 Index 63

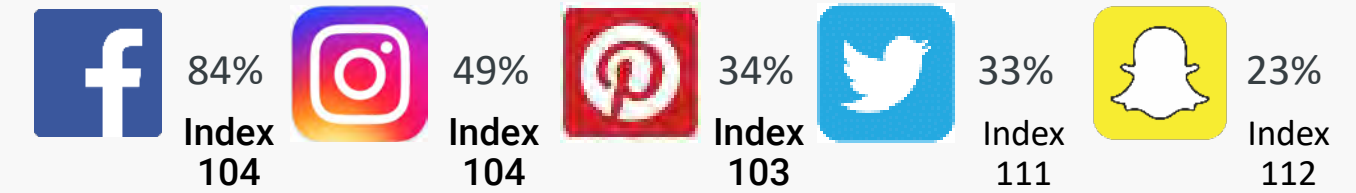
I would consider myself an outdoor enthusiast
 Mean 4.5 Index 140

I enjoy participating in outdoor activities with my family
 Mean 4.7 Index 116

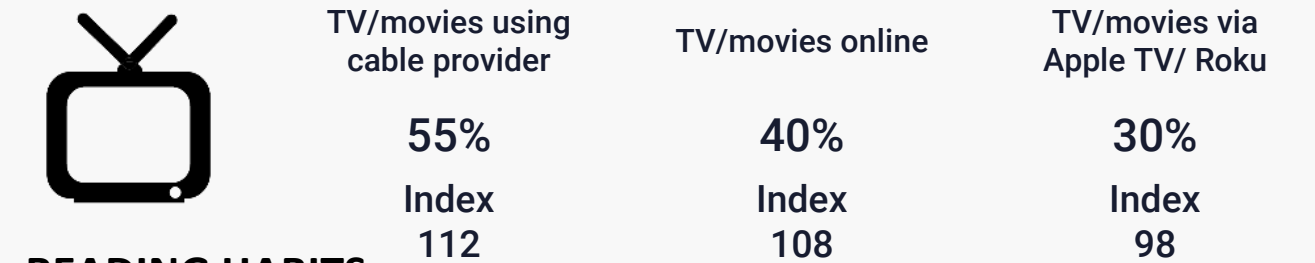
I participate in outdoor activities for adventure & excitement
 Mean 4.6 Index 124

I enjoy the social and adventure aspects of outdoor activities
 Mean 4.6 Index 120

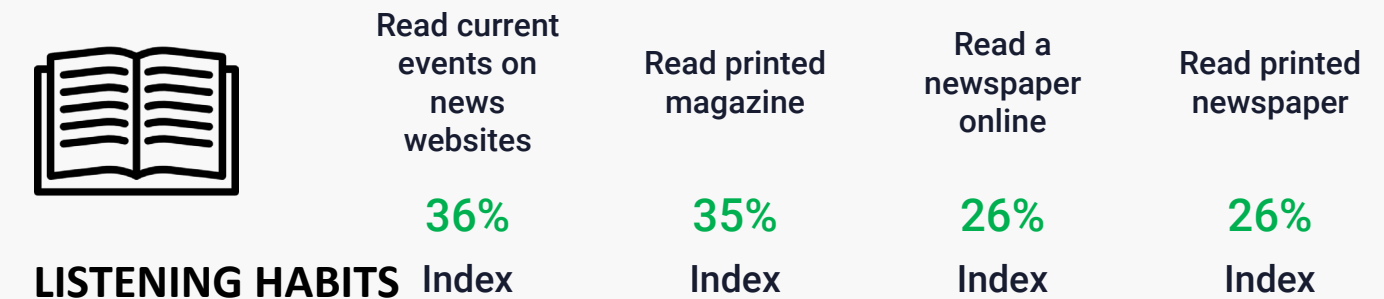
TOP 5 SOCIAL MEDIA SITES USED



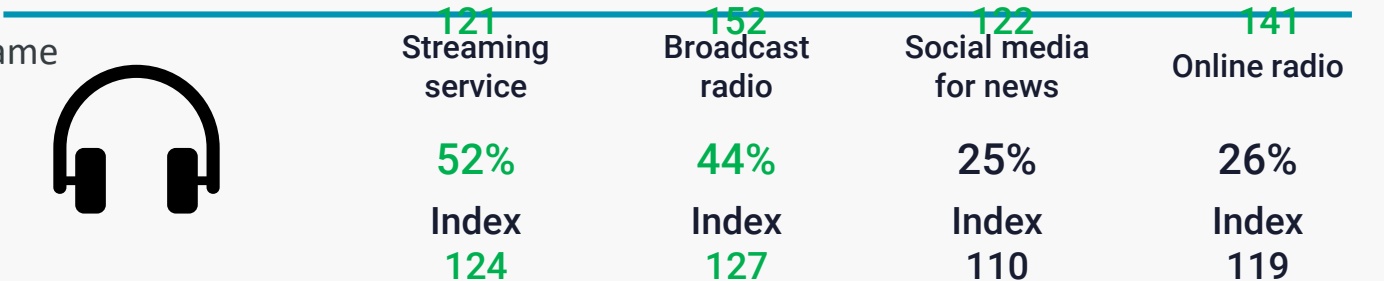
TELEVISION HABITS



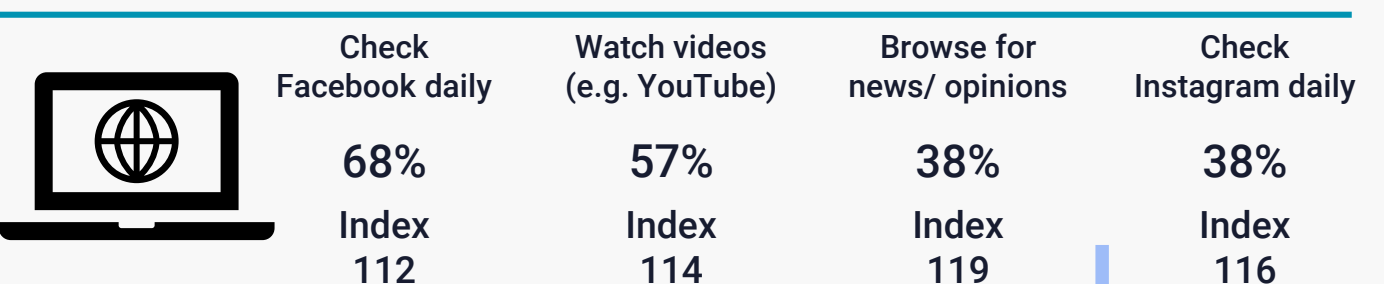
READING HABITS



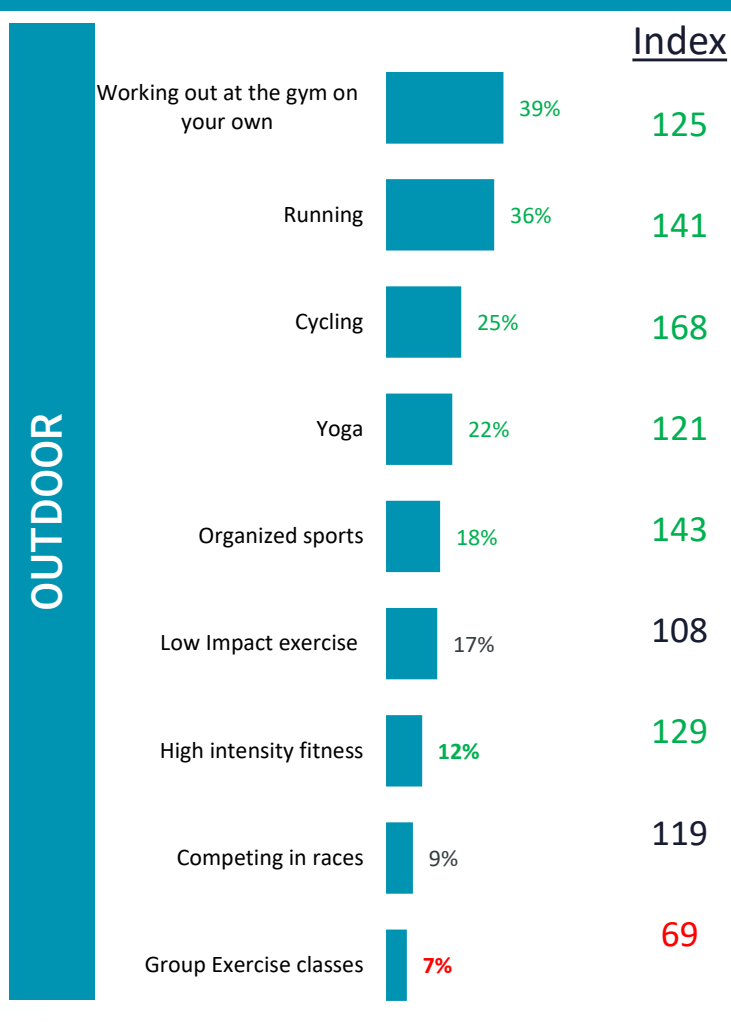
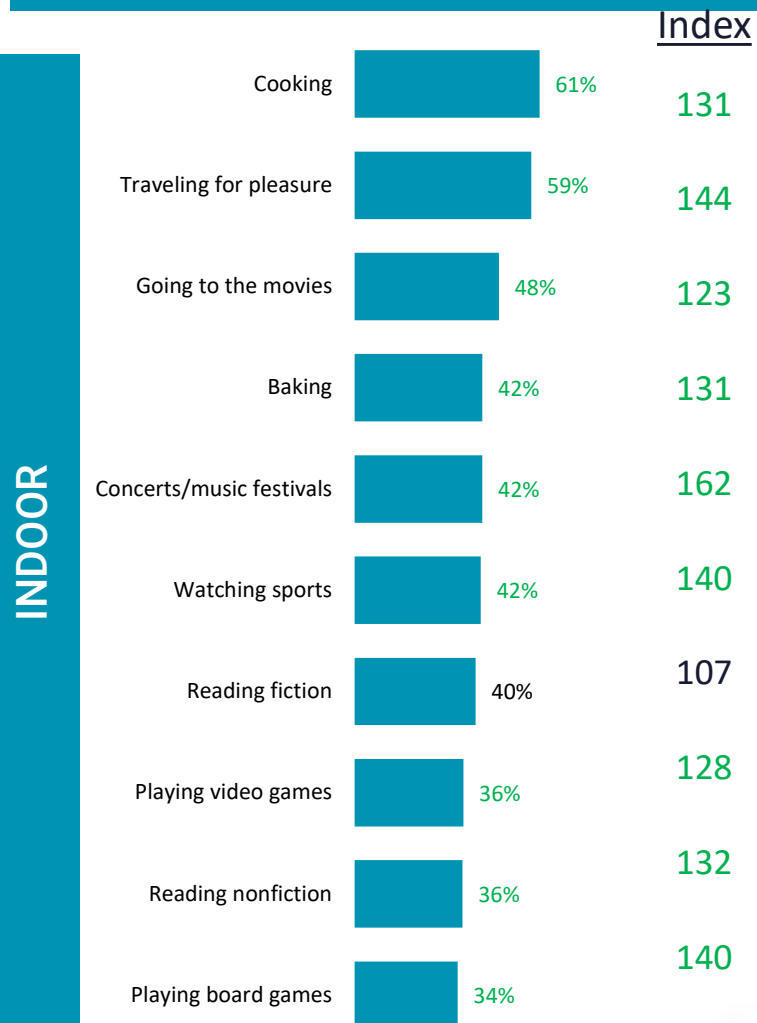
LISTENING HABITS



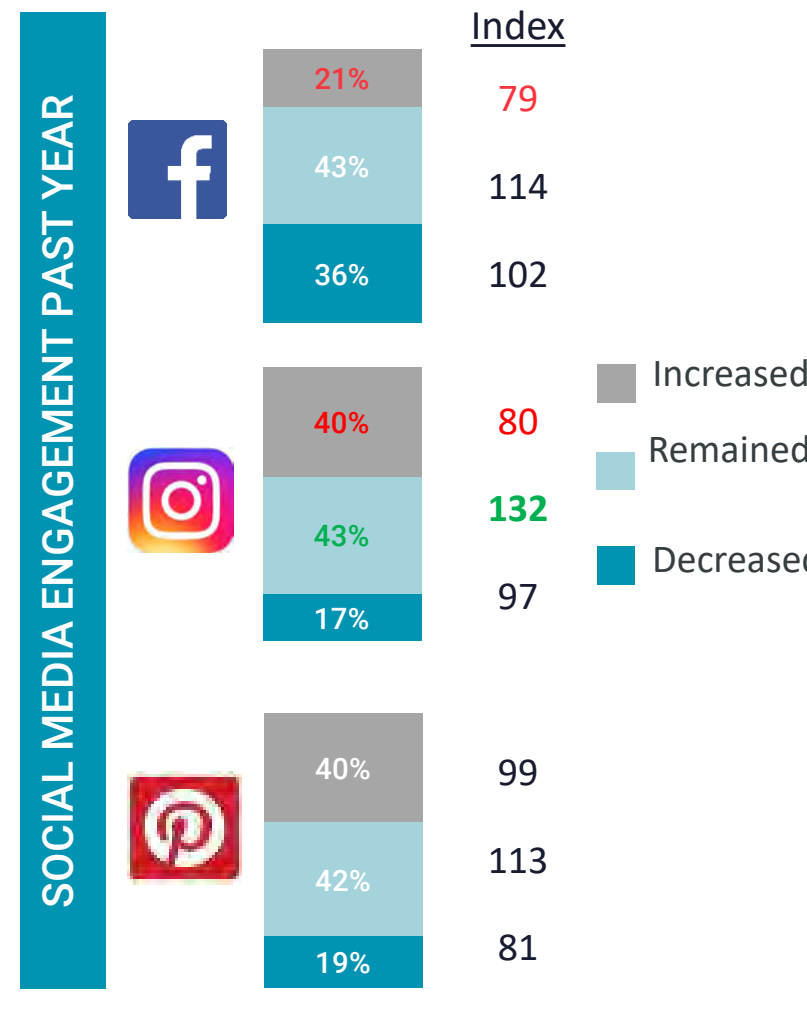
INTERNET BROWSING HABITS



HOBBIES



Only Top Responses Shown

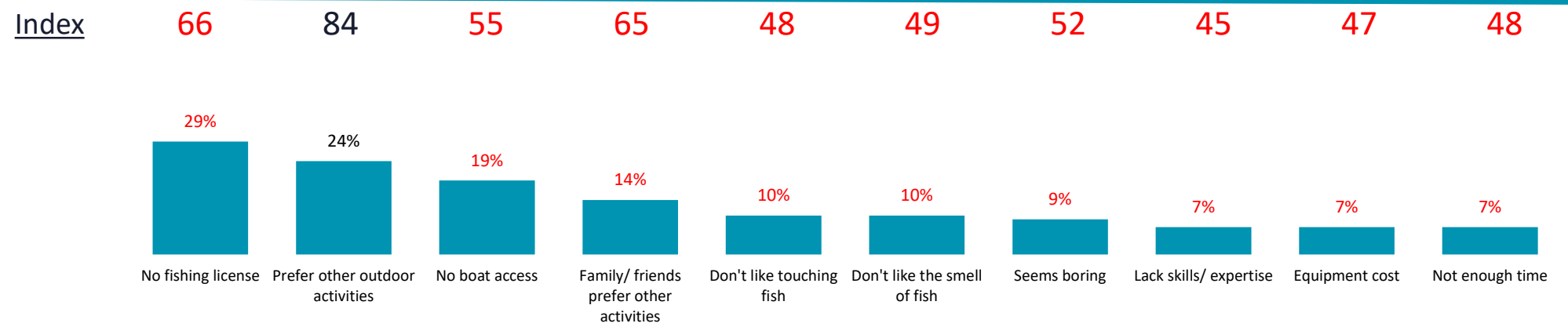


AVID ADVENTURISTS

Avid Adventurists would fish more if they had the time. They feel very prepared to fish and are less likely to have strong fishing education needs.

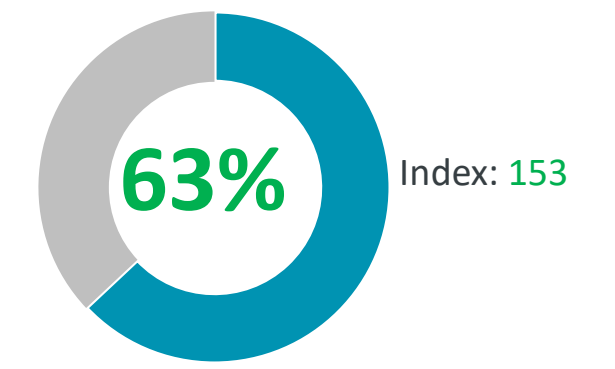


TOP FISHING BARRIERS (Completely Agree)

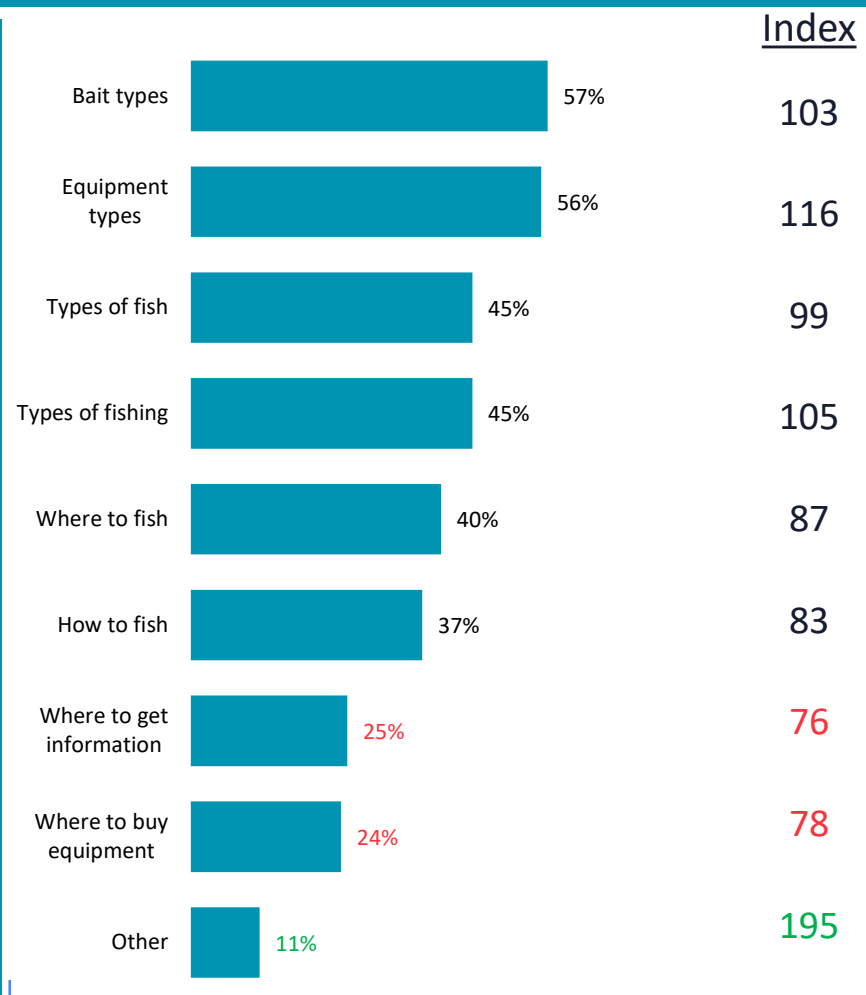


FREE TIME

Would fish more if they had more time



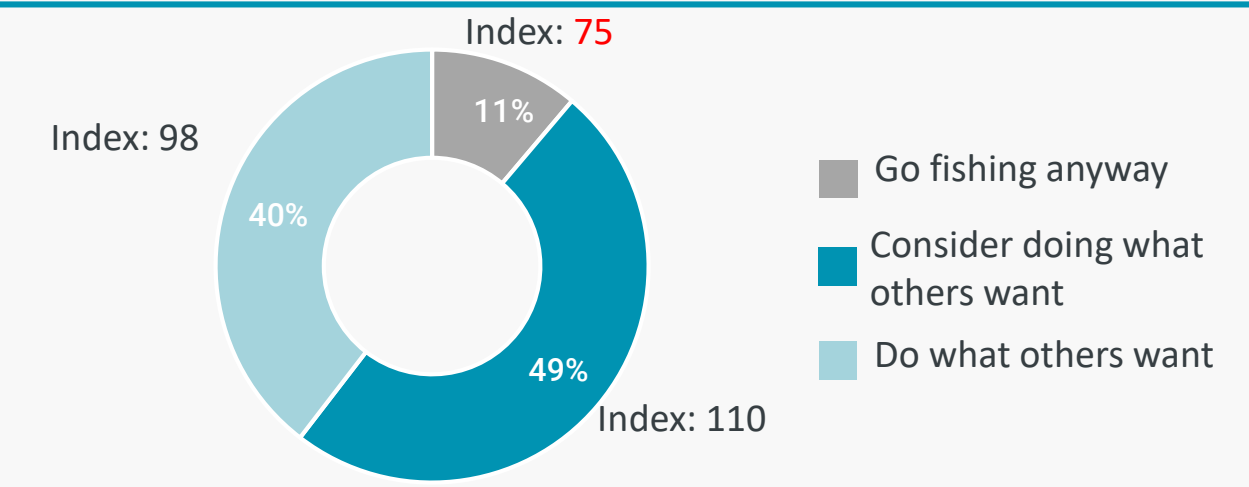
FISHING EDUCATION NEEDED



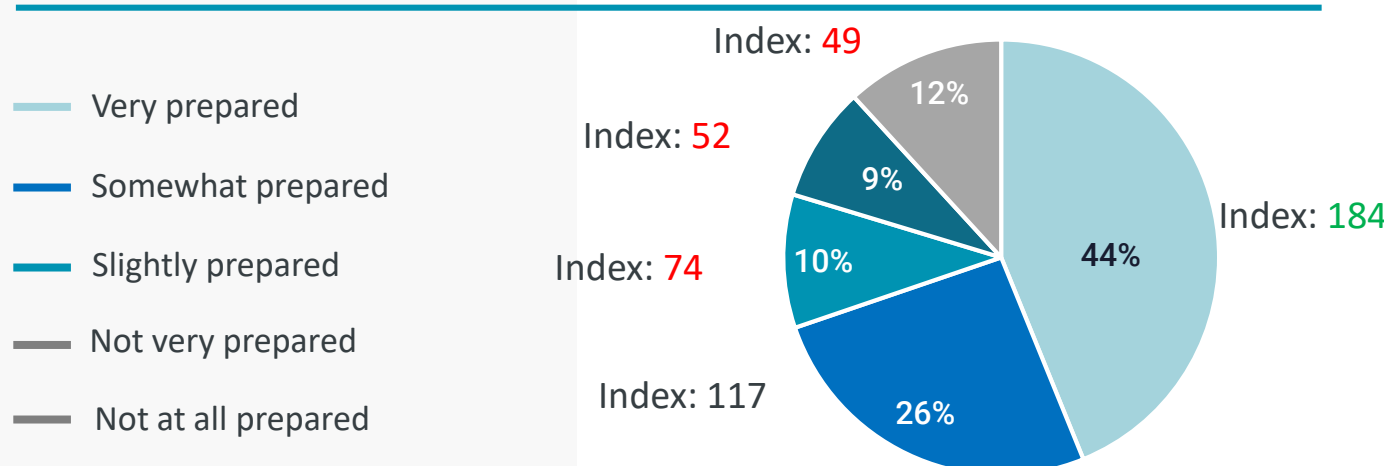
HOW SPEND TIME RATHER THAN FISH



PRIORITIZE FISHING



FISHING PREPAREDNESS



Green indicates over index versus total
Red indicates under index versus total

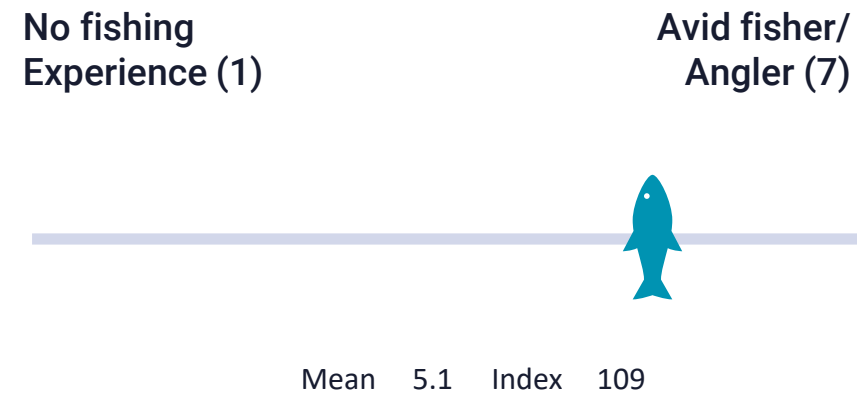
AVID ADVENTURISTS – Who Are anglers

Avid Adventurists are highly experienced fishers, have strong future intent to fish even more frequently and get strong emotional benefits from fishing, including relaxation and fun.



FISHING

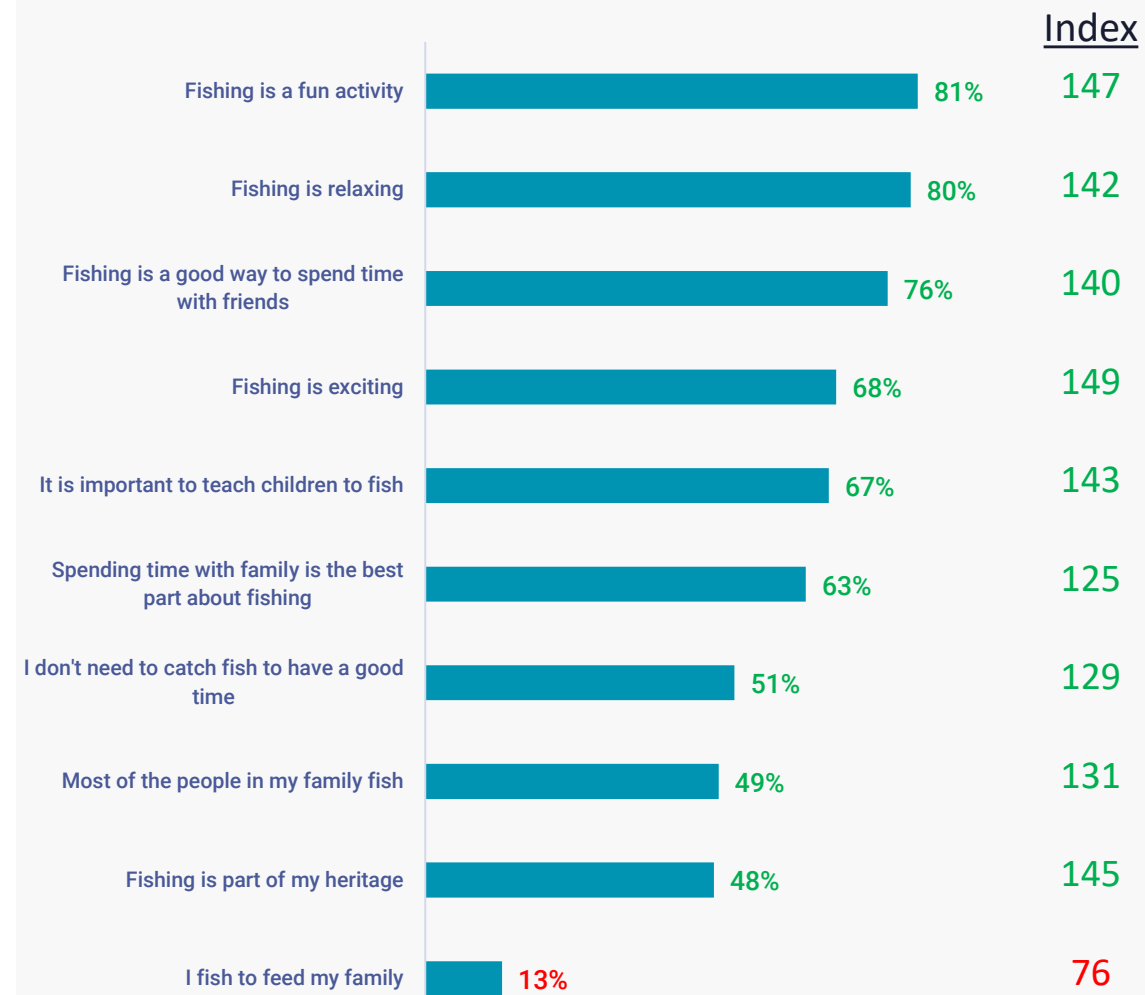
FISHING EXPERIENCE



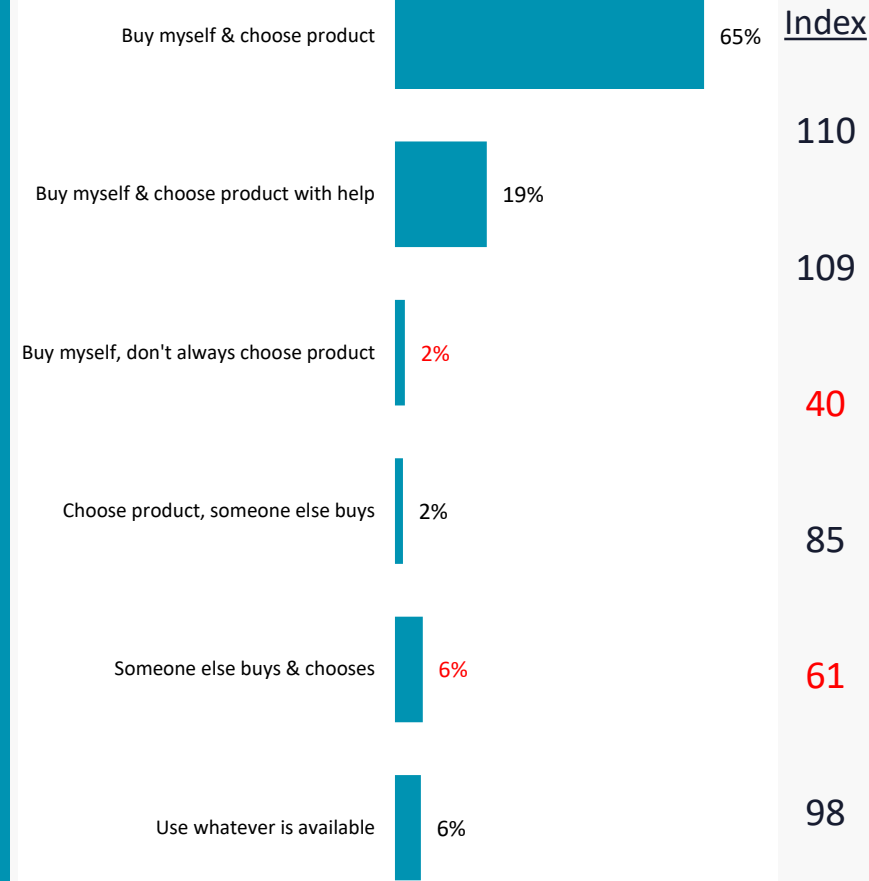
SPEND



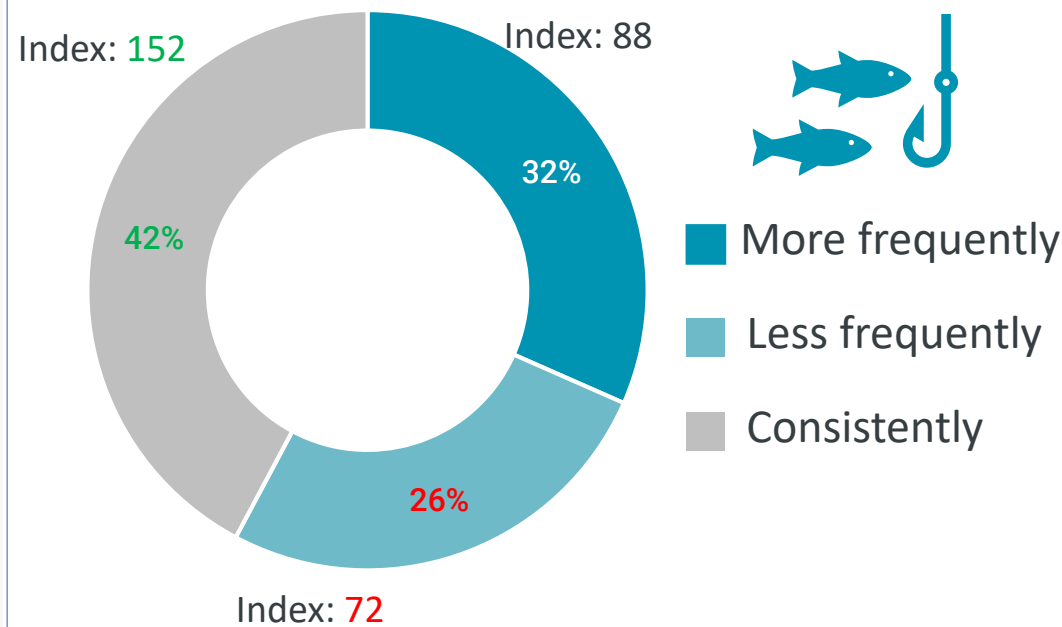
FISHING STATEMENT AGREEMENT *(Completely agree)*



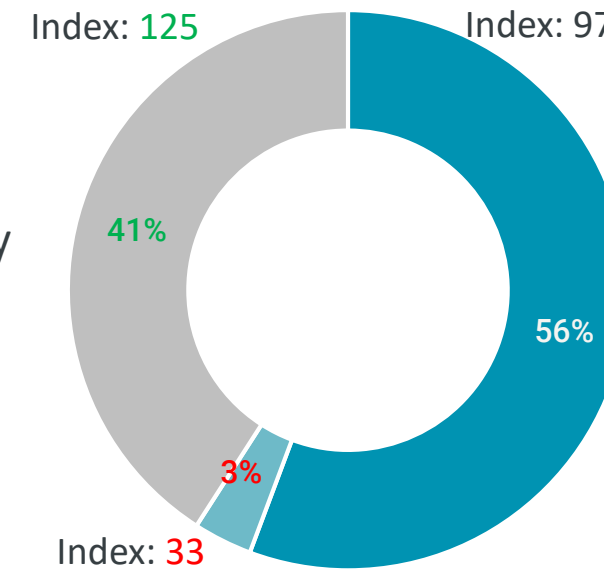
PRIMARY SHOPPER



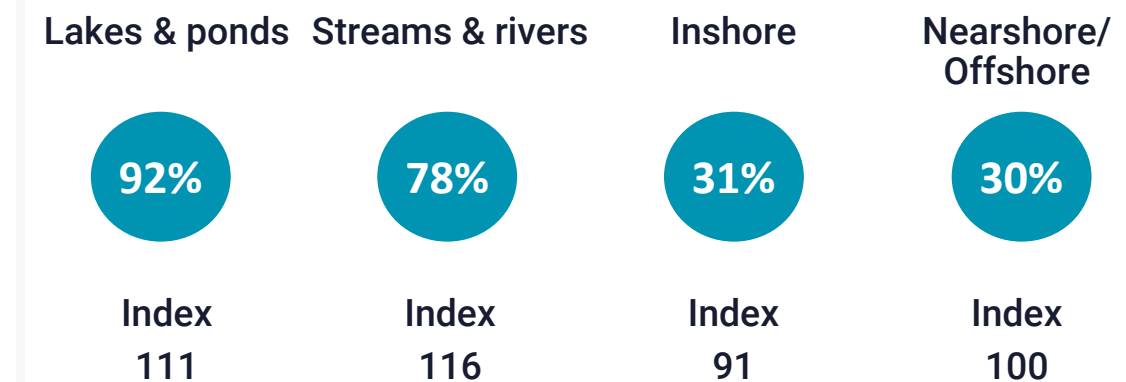
FISHING FREQUENCY P2Y



FUTURE FISHING FREQUENCY



TYPE OF WATER



Green indicates over index versus total
Red indicates under index versus total

AVID ADVENTURISTS – Who Are Anglers

Most Avid Adventurists anglers have their fishing license (because it's the right thing to do and they don't want to get caught) and they are more likely than others to fish year-round. Bass Pro Shops and Cabela's are key retailer skewers for this segment, with Walmart being the most commonly shopped retailer for equipment.

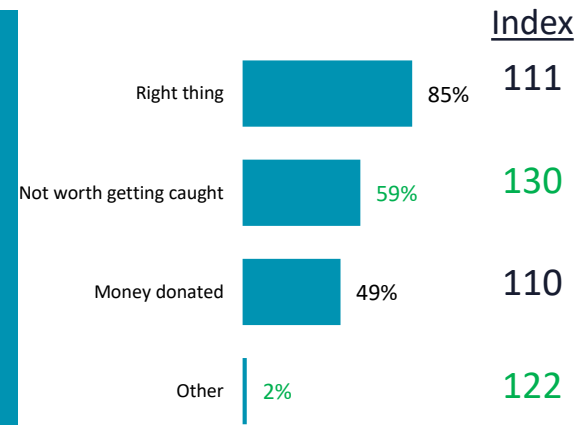


FISHING

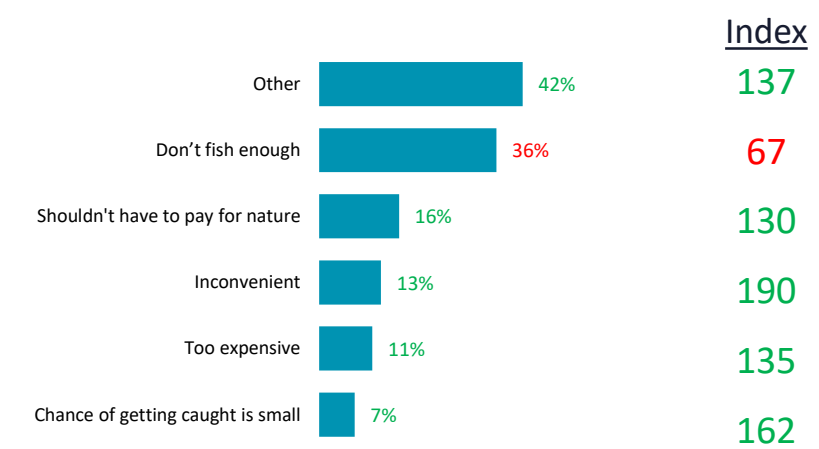
Have Fishing License

77%
Index 119

REASON WHY HAVE



REASON WHY DON'T HAVE



TYPE OF FISHING TRIP

Distance	Percentage	Index
Less than 1 hour	65%	114
1-2 hours	30%	85
3+ hours	5%	67

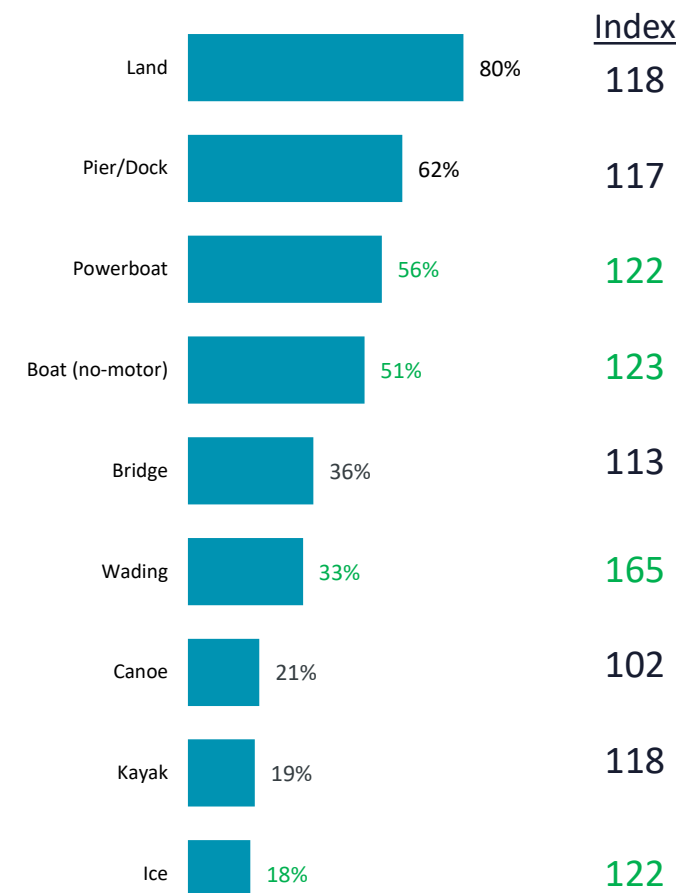
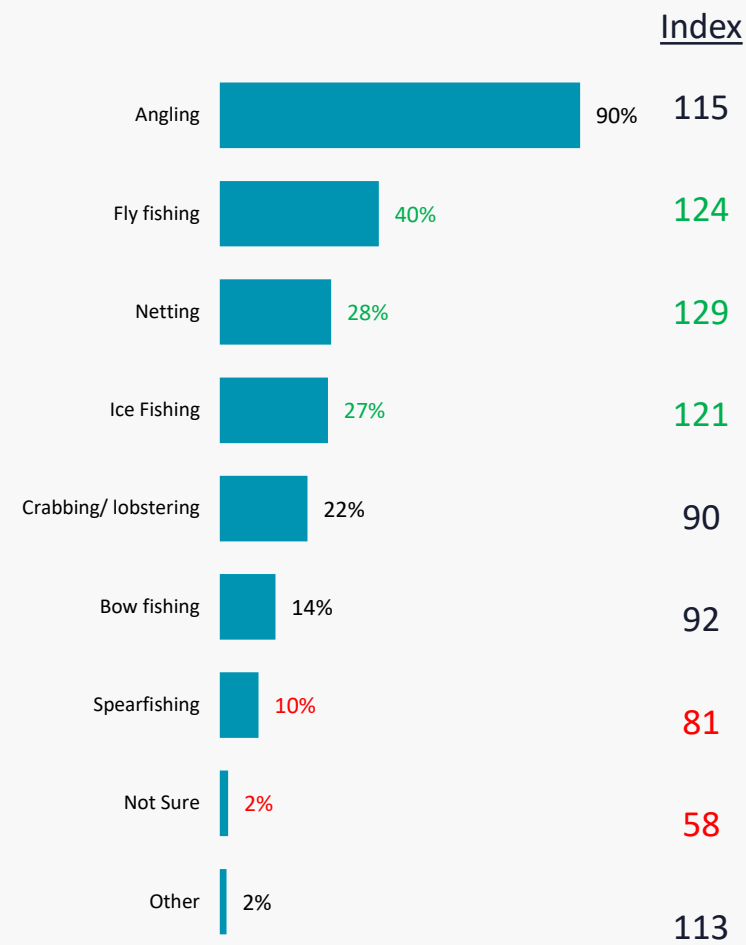
Length	Percentage	Index
Less than 1 day	35%	92
Day trip	49%	111
Weekend trip	14%	90
Longer than weekend	2%	74

TYPE OF FISHING

Category	Percentage	Index
For sport	0%	N/A
For leisure	100%	106

Category	Percentage	Index
Seasonally	36%	85
Year-round	55%	132
Special occasion	8%	54

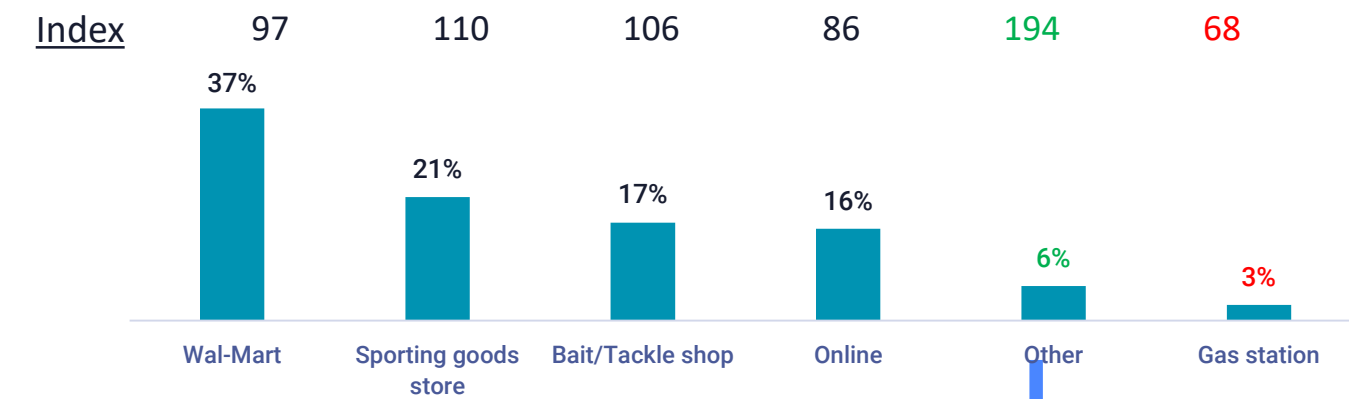
Category	Percentage	Index
Catch and release	49%	98
Keep to eat	51%	102



RETAILERS SHOPPED



LICENSE PURCHASE LOCATIONS



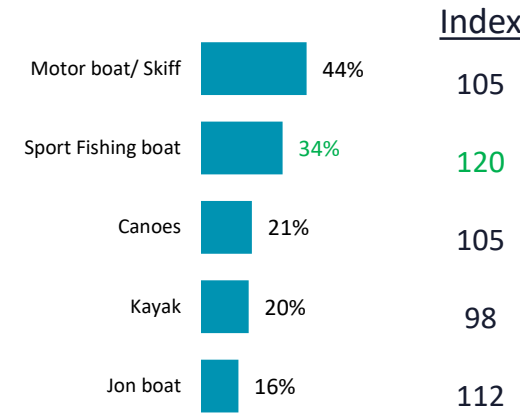
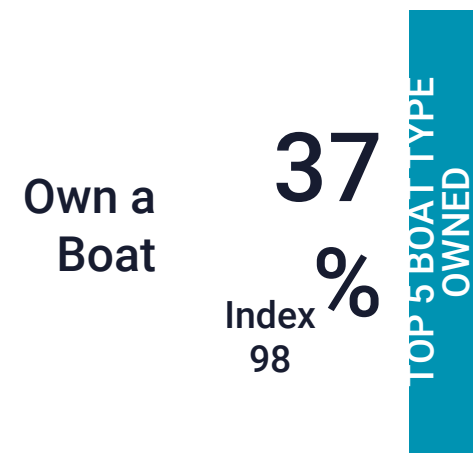
Green indicates over index versus total
Red indicates under index versus total

AVID ADVENTURISTS – Who Are boaters

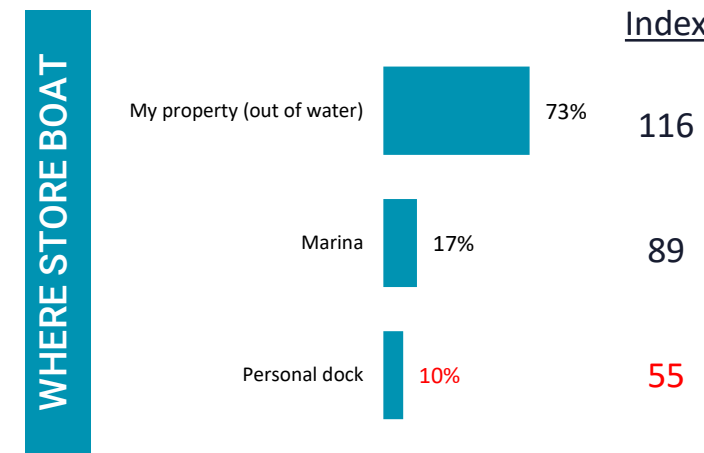
While only about 1/3 of Avid Adventurist boaters own a boat, they skew to boating more frequently than in the recent past and also skew to intending to boat more frequently in the future. For 8 in 10 of them, their boating activities also involve fishing.



BOATING

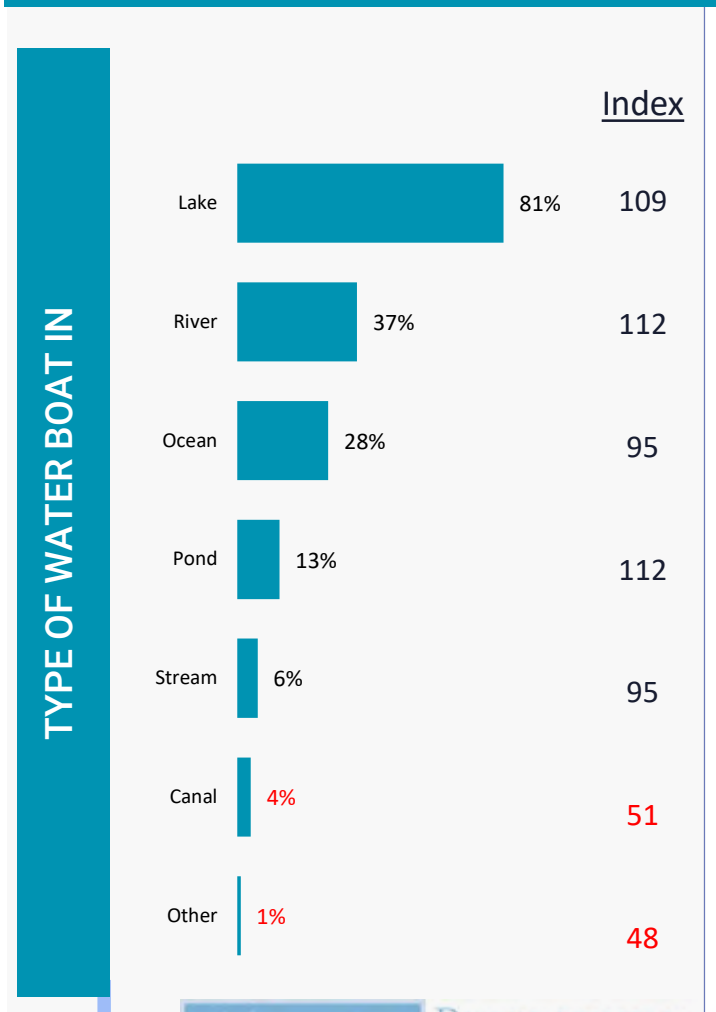


Only Top Responses Shown

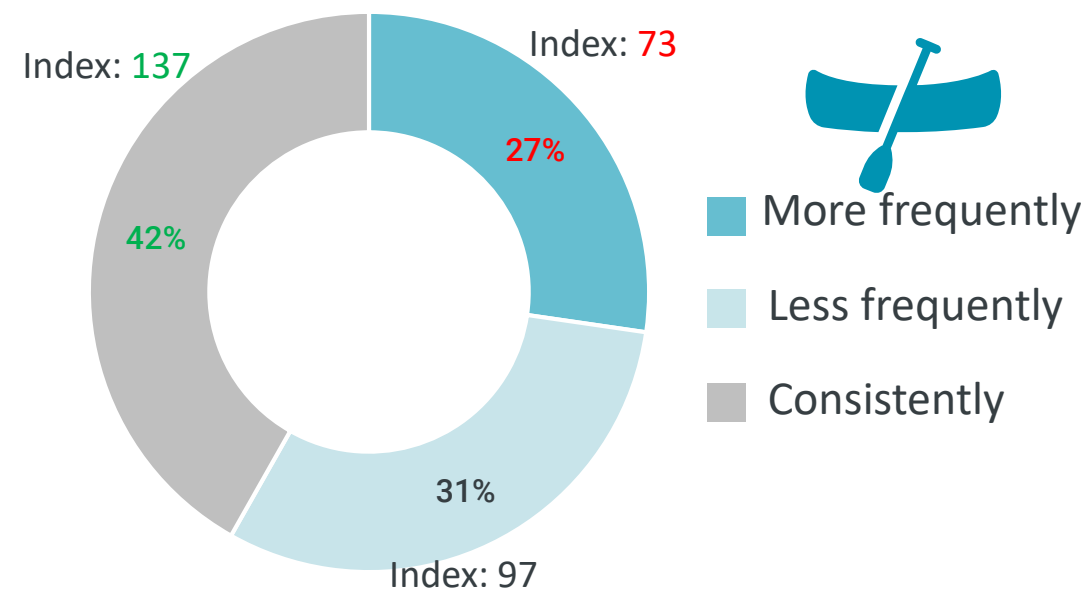


TYPE OF BOATING TRIP

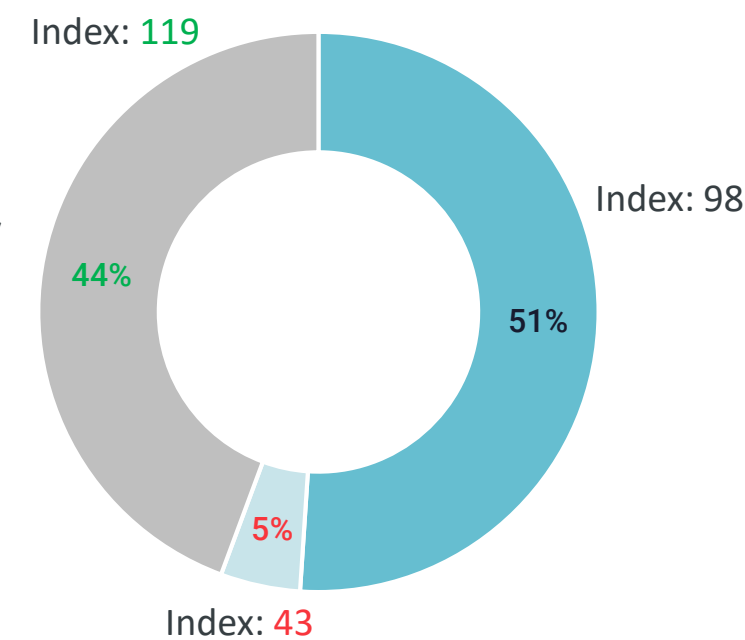
Distance		Index
Less than 1 hour	56%	111
1-2 hours	34%	93
3+ hours	10%	78
Length		
Day getaway	57%	132
Part of trip, but not the purpose	53%	127
Weekend getaway	52%	144
3+ day trip	29%	147
Morning activity	27%	152
Evening activity	26%	144
Afternoon activity	22%	161
Activity		
Fish	80%	124
Ride around	75%	100
Anchor and Swim/ Sunbathe	54%	106
Water sports	48%	103
Transportation	20%	103
Other	2%	175



BOATING FREQUENCY P2Y

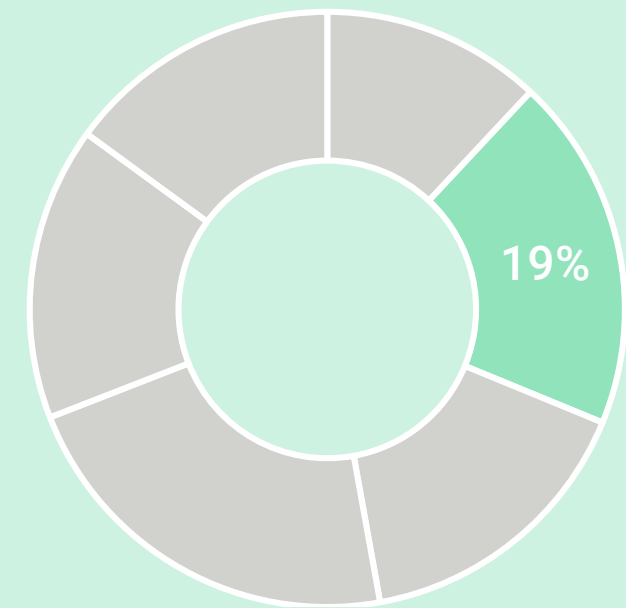


FUTURE BOATING FREQUENCY



Green indicates over index versus total
Red indicates under index versus total

TARGET SEGMENT: ACTIVE SOCIAL FAMILIES



KEY THEMES:

- 1** *Active Social Families enjoy the outdoors and being active with friends and family. They get a variety of benefits from outdoor activities from fun/excitement to family bonding to relaxation.*
- 2** *Active Social Families enjoy and show strong interest in fishing & boating. For them, it's part of their heritage and for those that have children, they want to teach them.*
- 3** *Active Social Families are 'all in' when it comes to social media and an important benefit of any outdoor activity is to post it as part of building their personal 'brand'.*



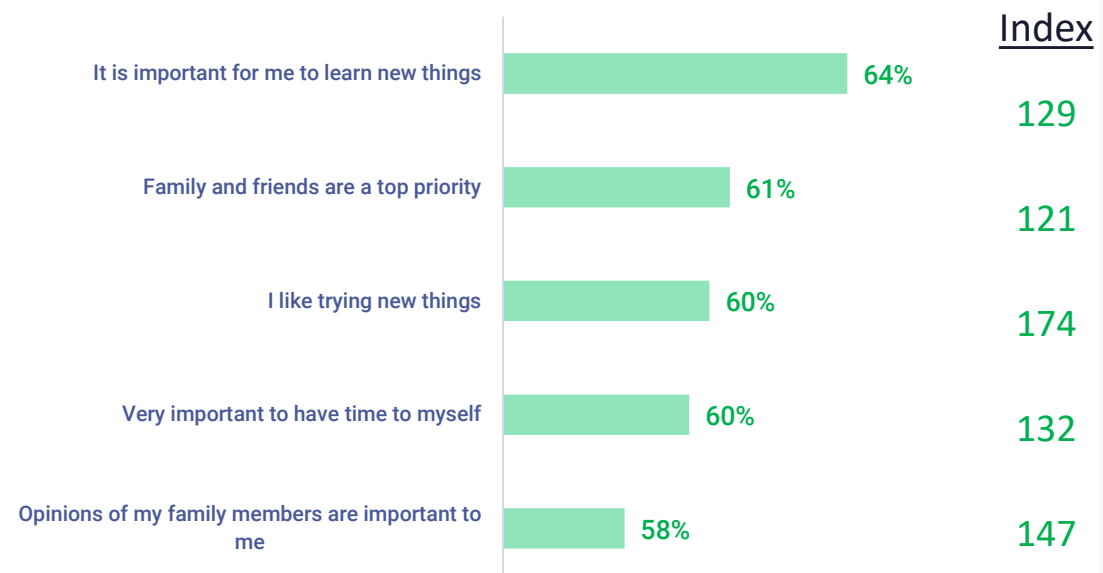
ACTIVE SOCIAL FAMILIES

Active Social Families are made up of younger families who are very interested and engaged in both boating and fishing as well as a variety of other outdoor activities. Family is a top priority to them as well as the opinions of these family members.

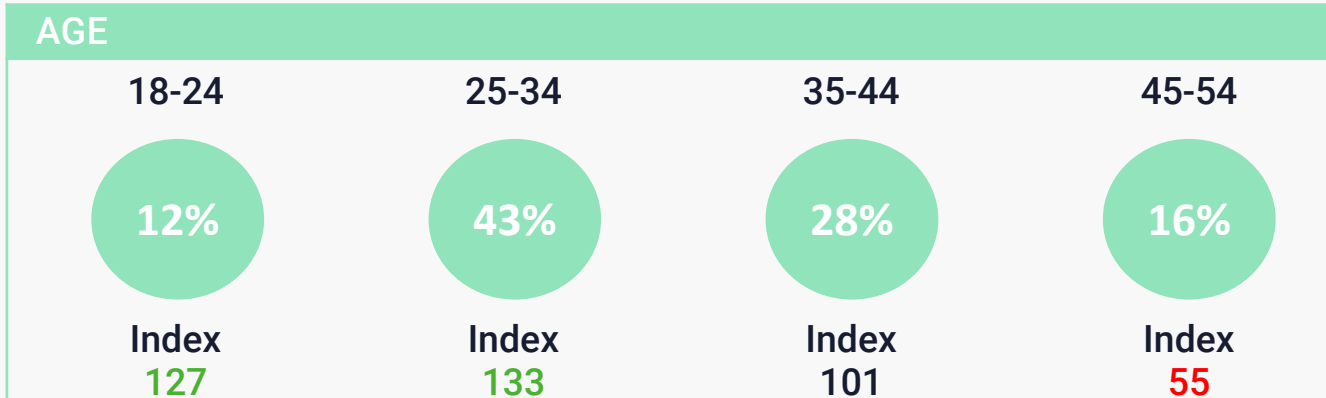


SEGMENT SIZE
(% OF PEOPLE)
19%

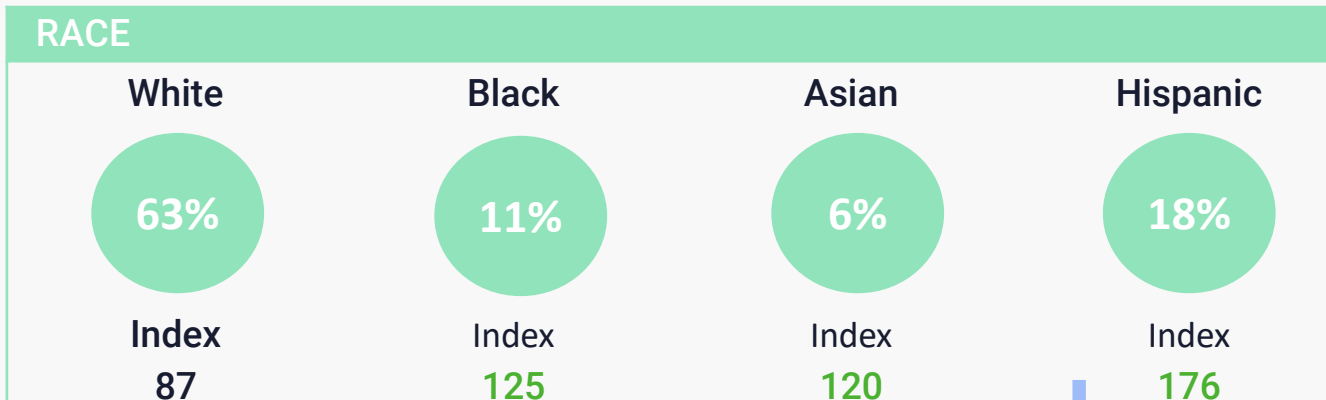
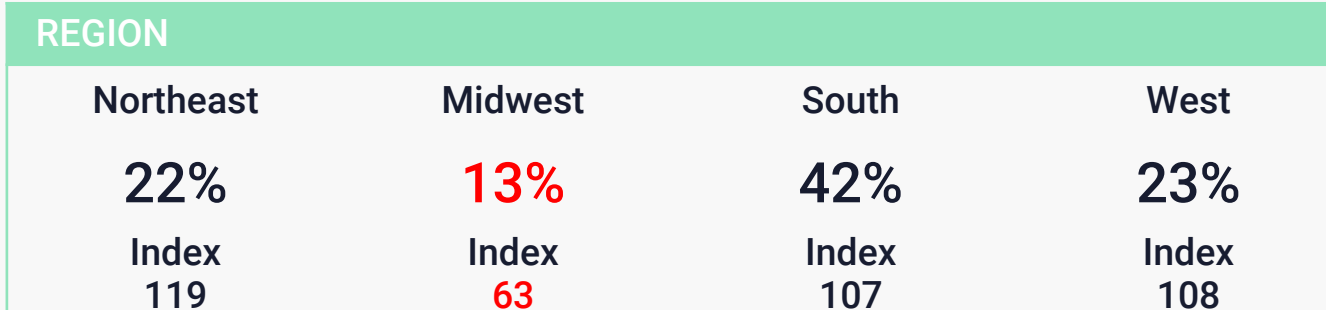
TOP ATTITUDES



DEMOGRAPHICS



	Index
GENDER	59% Male/41% Female 139/71
INCOME (mean)	\$79,300 106
MARITAL STATUS	60% Married 112
HH SIZE (mean)	3.1 102
CHILDREN IN HH	59% 123



OUTDOOR ACTIVITY

Only Top Responses Shown

OUTDOOR ACTIVITY ENJOYMENT

Enjoy extremely

Activity	Percentage	Index
Beach	71%	138
Lake/ river	60%	144
Boating	60%	172
Tailgating	59%	156
Camping	56%	176
Motorcycling	56%	162
Jet Skiing/Wave Runner	55%	155
Four-wheeling/off-roading	55%	149
Hunting	54%	162
Gardening	50%	168
Visit parks	50%	134
Fishing	49%	185

OUTDOOR ACTIVITY INTEREST

Very interested

Activity	Percentage	Index
Beach	76%	124
Lake/River	65%	129
Visit parks	62%	128
Camping	58%	160
Boating	55%	162
Picnicking	55%	139
Tailgating	54%	177
Fishing	52%	160
Hiking	51%	157
Running/Jogging	50%	214
Gardening	48%	147
Jet Skiing	48%	189

BOATERS

5.3

30%
Index 125

Avg. # times
boat per year
Index 148

ANGLERS

6.6

41%
Index 124

Avg. # times
fish per year
Index 141

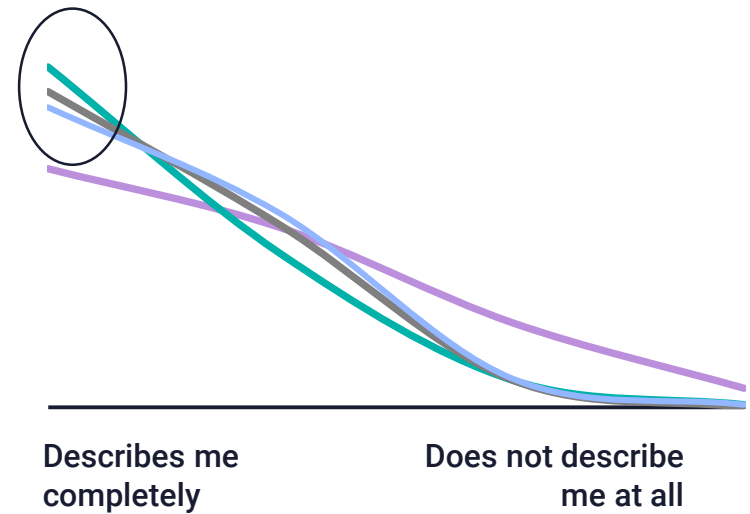
ANGLERS & BOATERS

21%
Index 125

Green indicates over index versus total
Red indicates under index versus total

ACTIVE SOCIAL FAMILIES

Active Social Families are also above average participants in a wide variety of fitness activities, including running, yoga and organized sports. They are active on social media and demonstrate increased engagement over prior year.



Don't consider myself an "avid outdoorsman" Mean 3.9 Index 112

I would consider myself an outdoor enthusiast Mean 4.2 Index 130

I enjoy participating in outdoor activities with my family Mean 4.6 Index 114

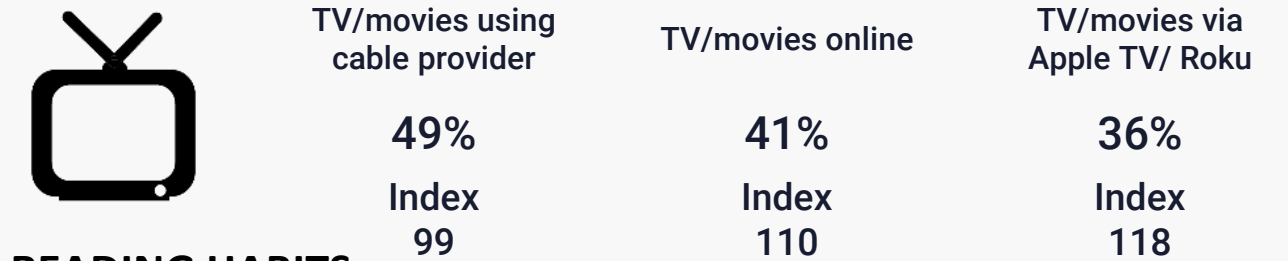
I participate in outdoor activities for adventure & excitement Mean 4.6 Index 122

I enjoy the social and adventure aspects of outdoor activities Mean 4.5 Index 118

TOP 5 SOCIAL MEDIA SITES USED



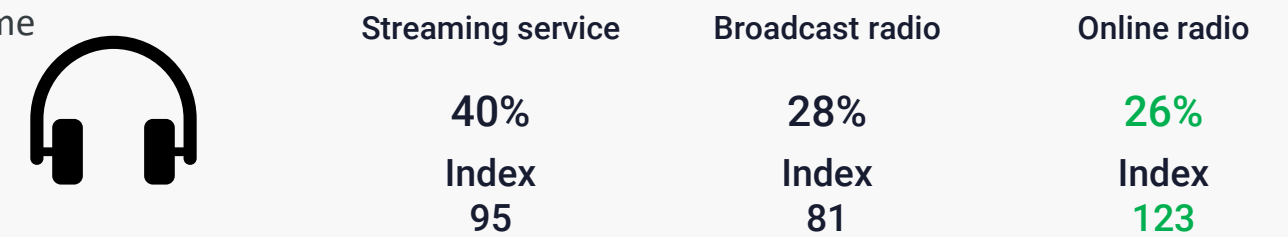
TELEVISION HABITS



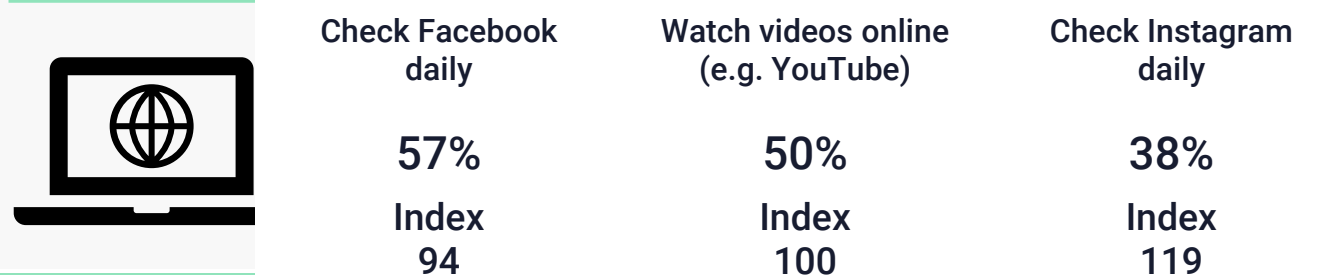
READING HABITS



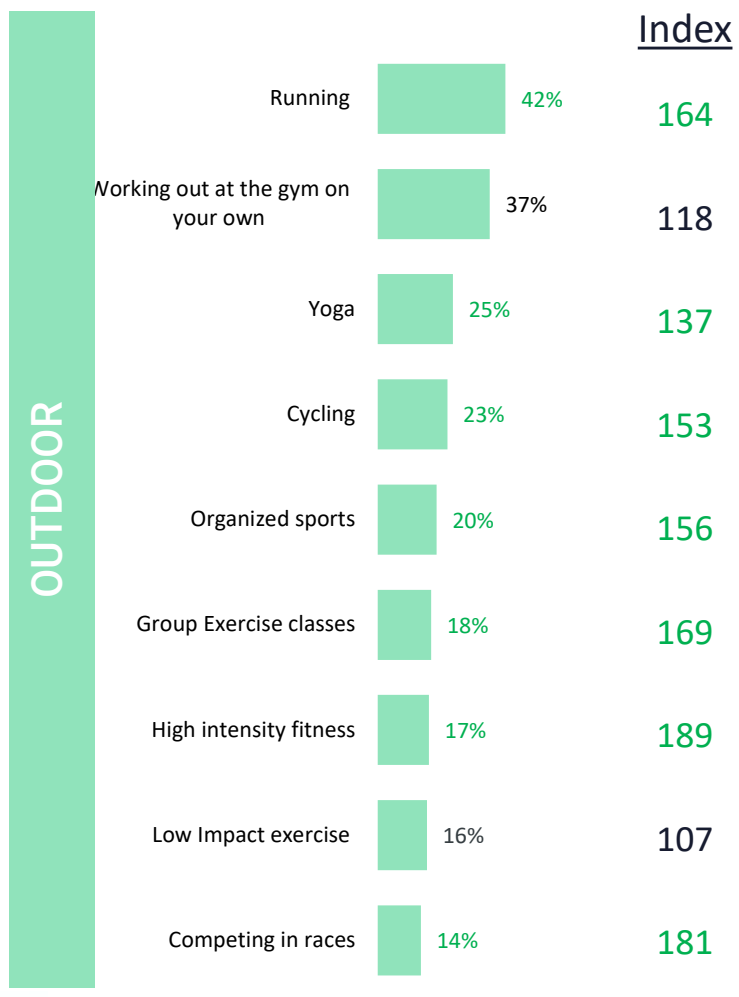
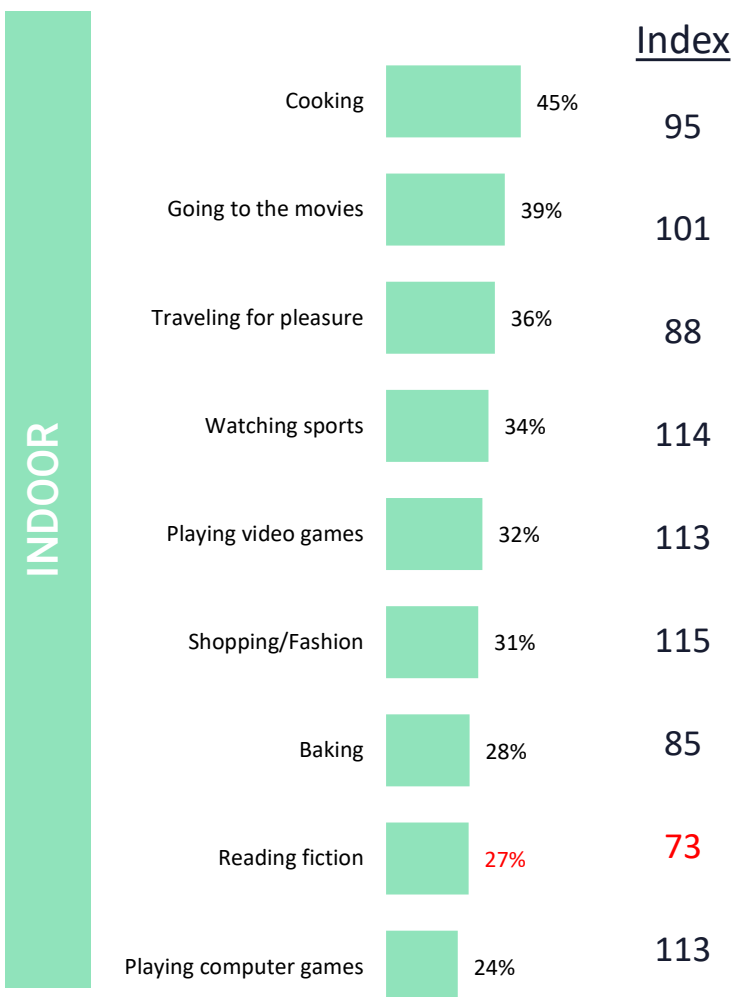
LISTENING HABITS



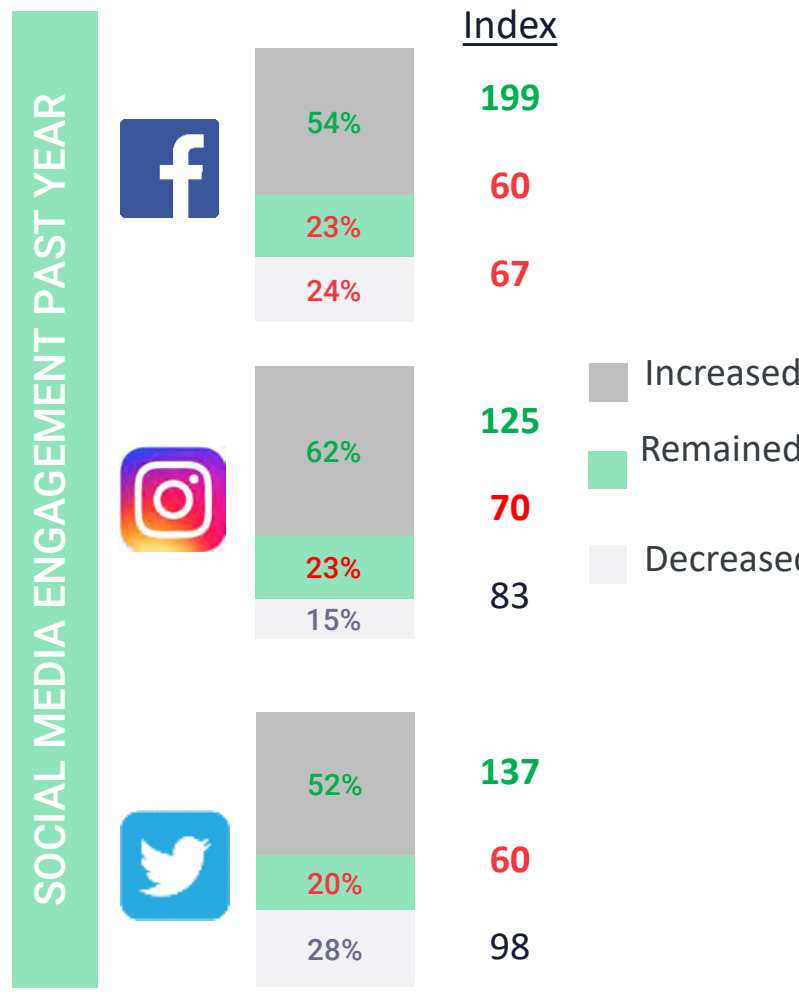
INTERNET BROWSING HABITS



HOBBIES



SOCIAL MEDIA ENGAGEMENT PAST YEAR



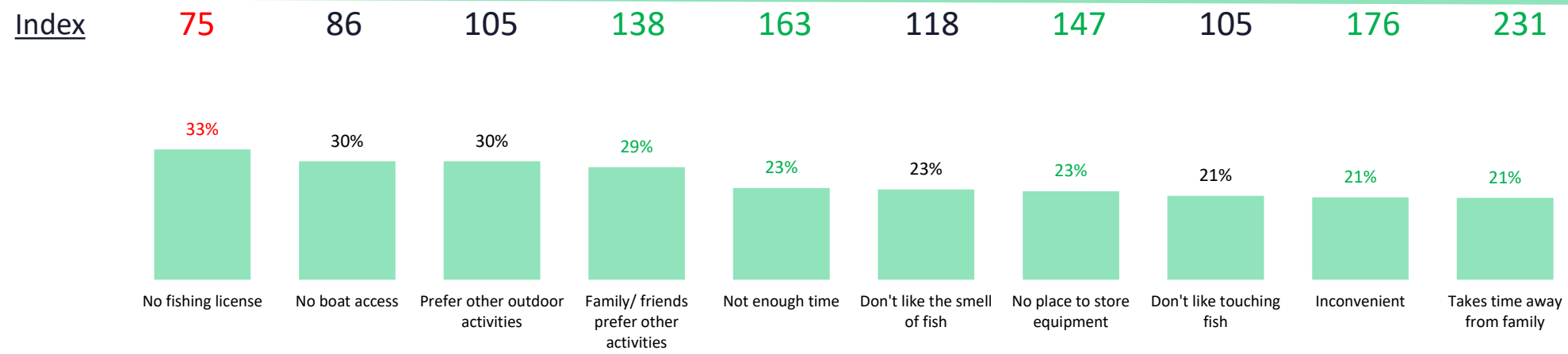
Green indicates over index versus total
Red indicates under index versus total

ACTIVE SOCIAL FAMILIES

Fishing is a priority for Active Social Families and they would go more frequently given more time. They are typically very prepared for fishing and their key barrier is when family members prefer other activities more than fishing.

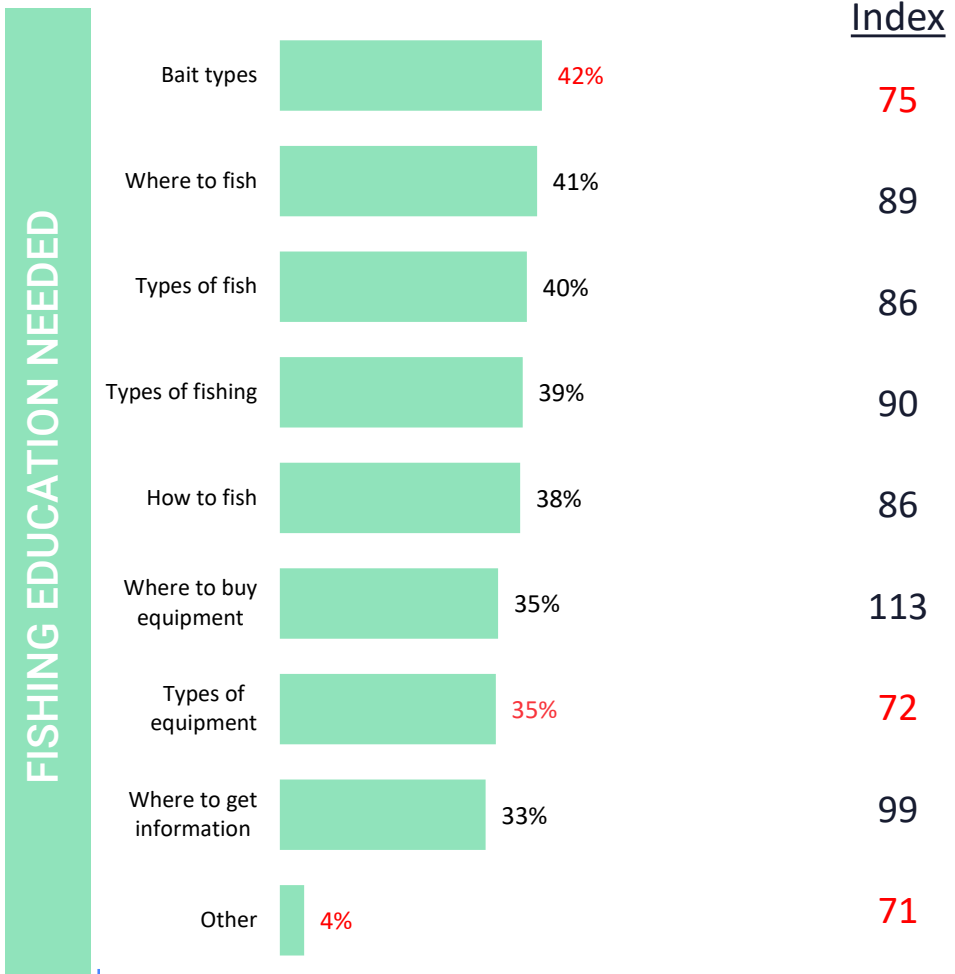
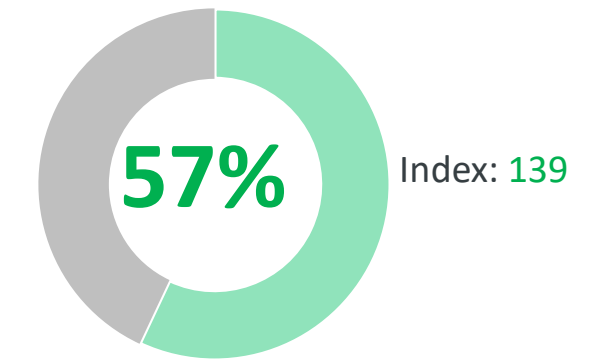


TOP FISHING BARRIERS (Completely Agree)

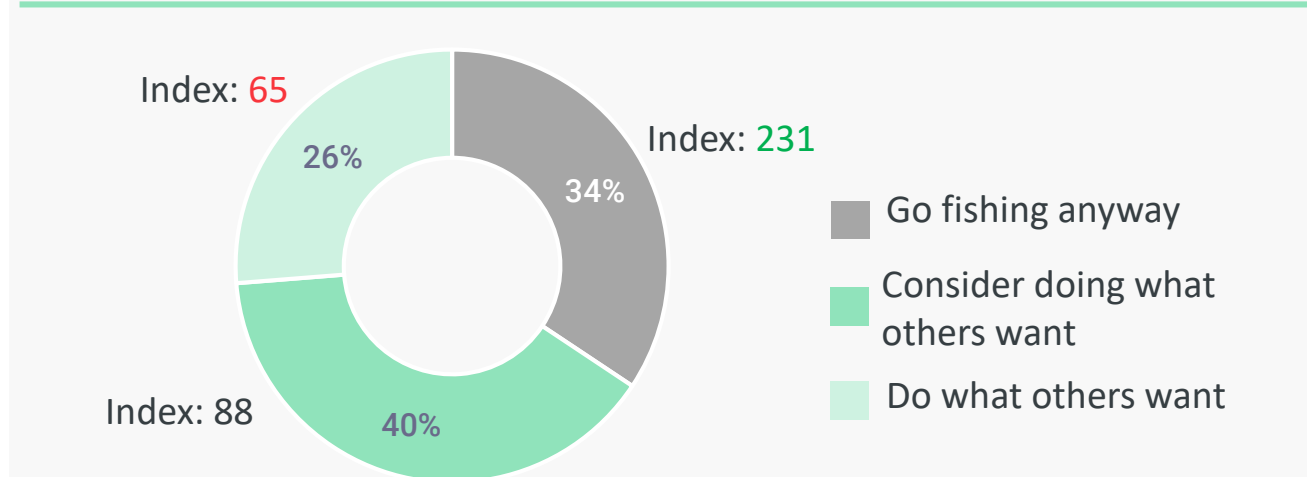


FREE TIME

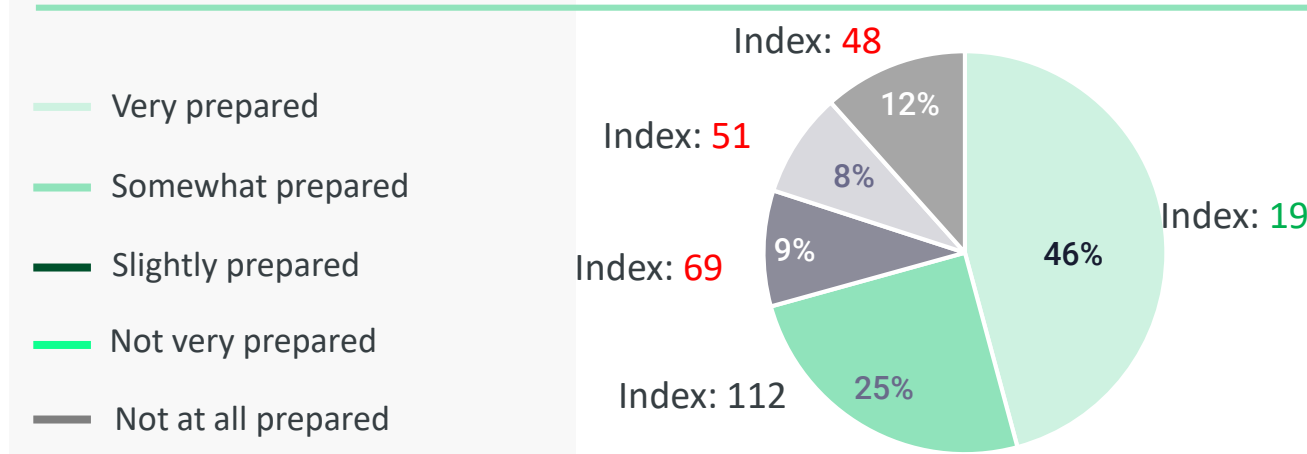
Would fish more if they had more time



PRIORITIZE FISHING



FISHING PREPAREDNESS



Green indicates over index versus total
Red indicates under index versus total

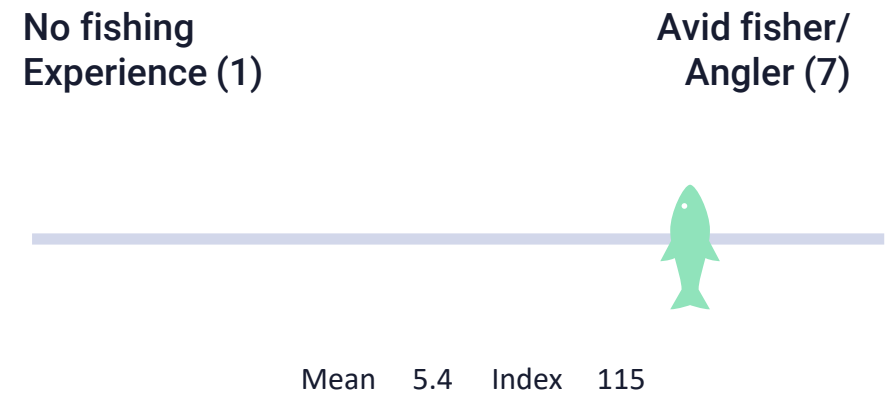
ACTIVE SOCIAL FAMILIES – Who Are Anglers

Active Social Families are more experienced fishers and spend an above average amount on fishing equipment that they typically choose themselves. They have strong future interest in fishing and receive emotional benefits from fishing, including excitement social bonding with friends and family, as well as fishing to provide food.



FISHING

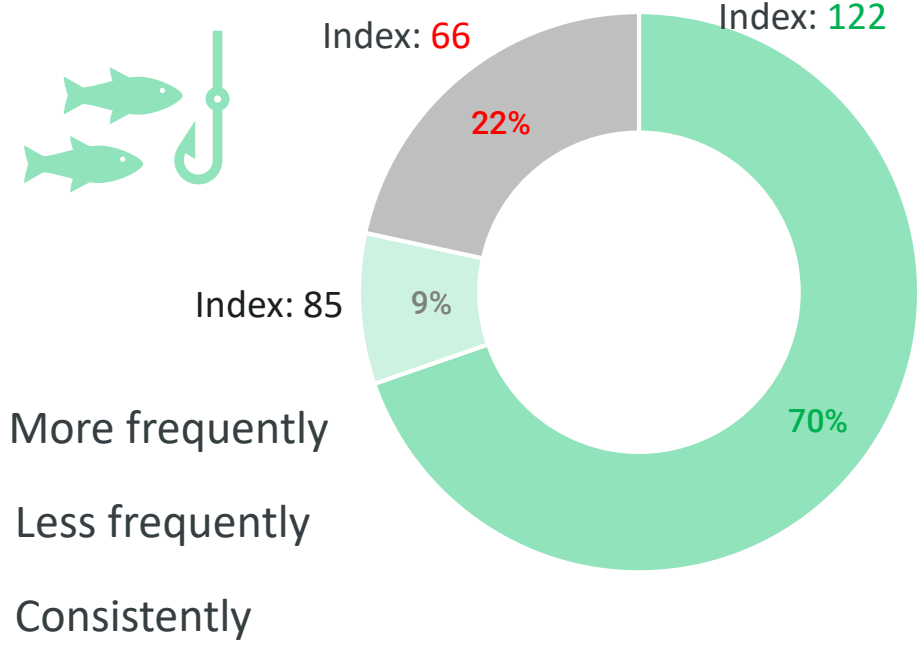
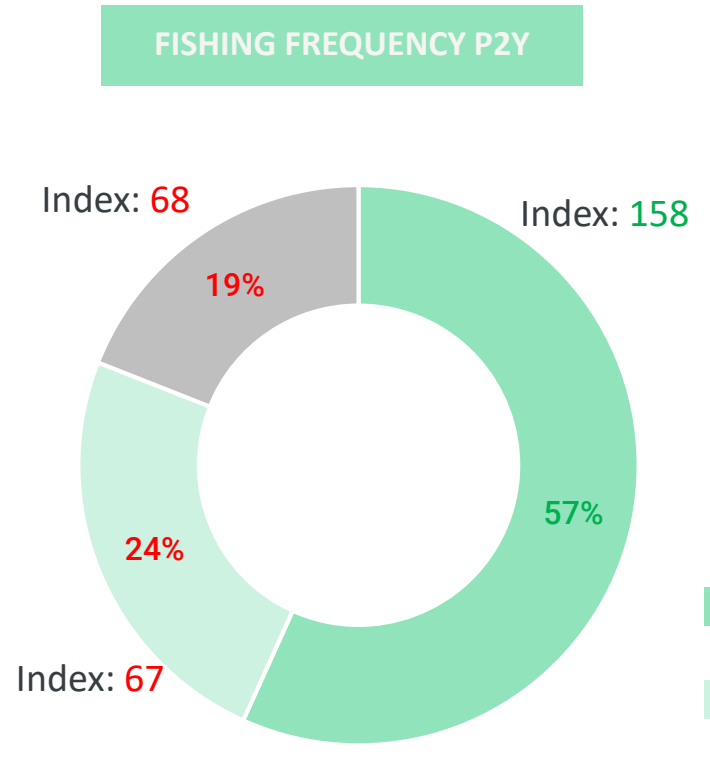
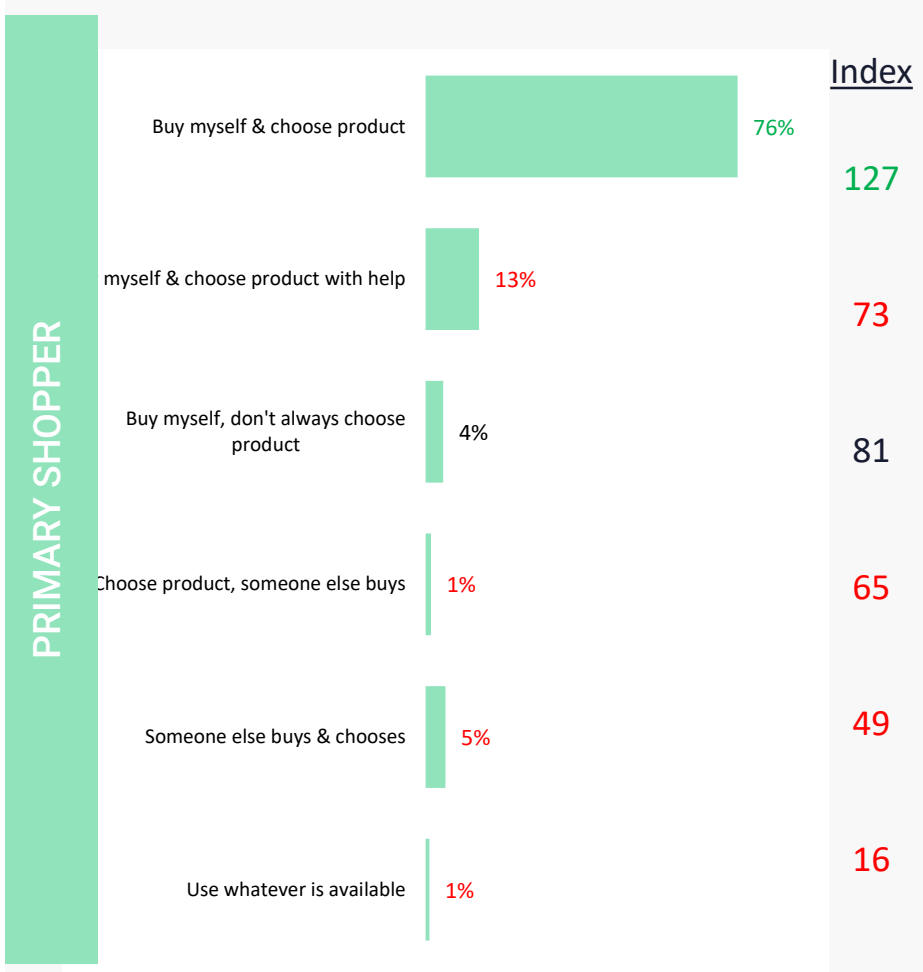
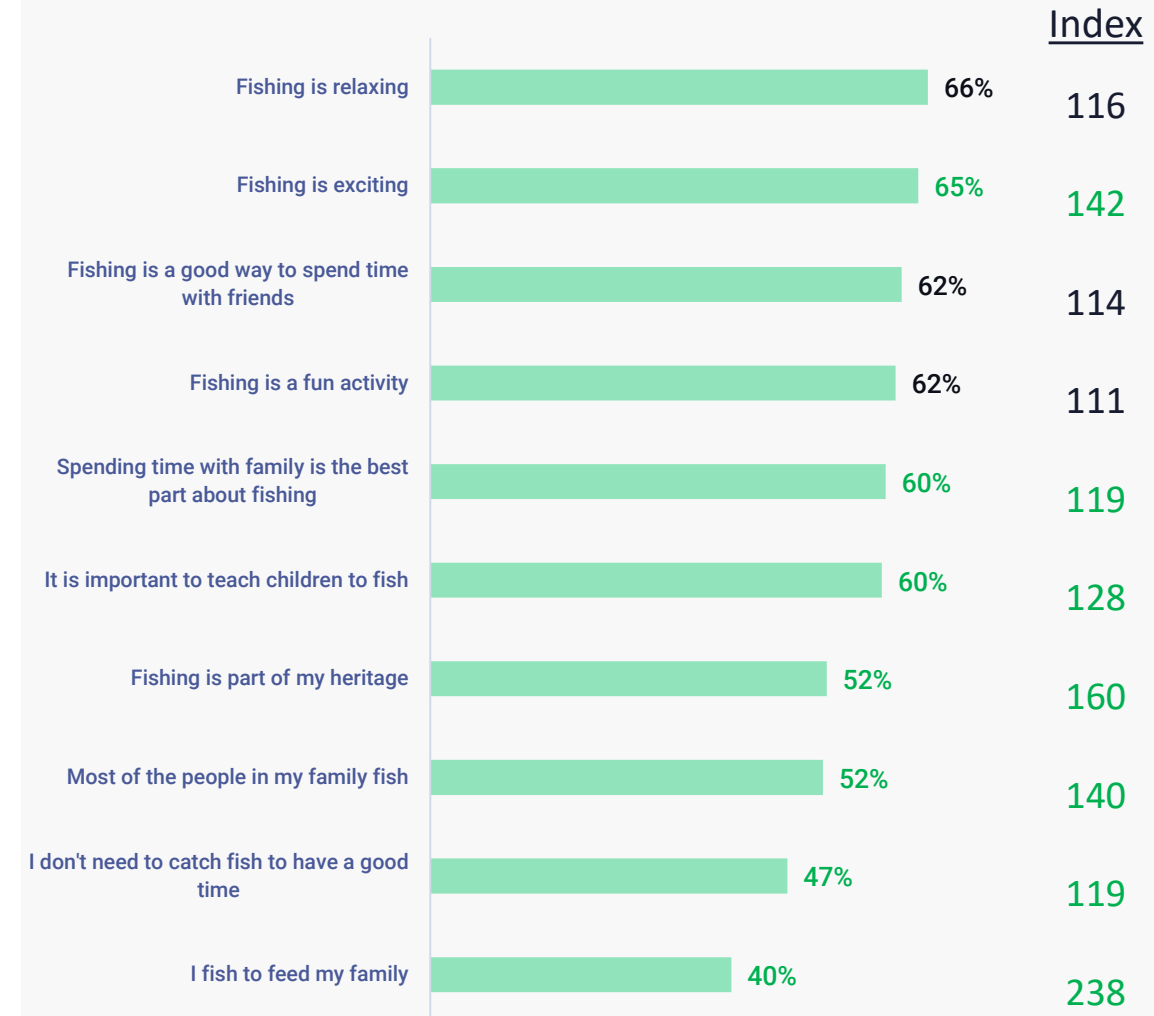
FISHING EXPERIENCE



SPEND



FISHING STATEMENT AGREEMENT *(Completely agree)*



TYPE OF WATER



Green indicates over index versus total
Red indicates under index versus total

ACTIVE SOCIAL FAMILIES – Who Are anglers

Most of the Active Social Families who are anglers have their fishing license and they enjoy a wide variety of fishing types, from fly to crabbing to even ice fishing. They skew to fishing from boats and their fishing trips are usually a day or even longer.



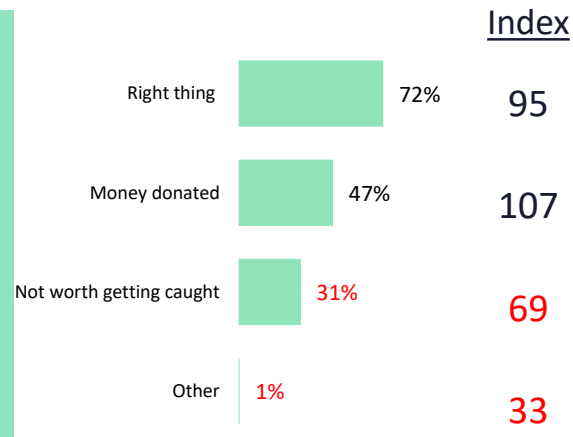
FISHING



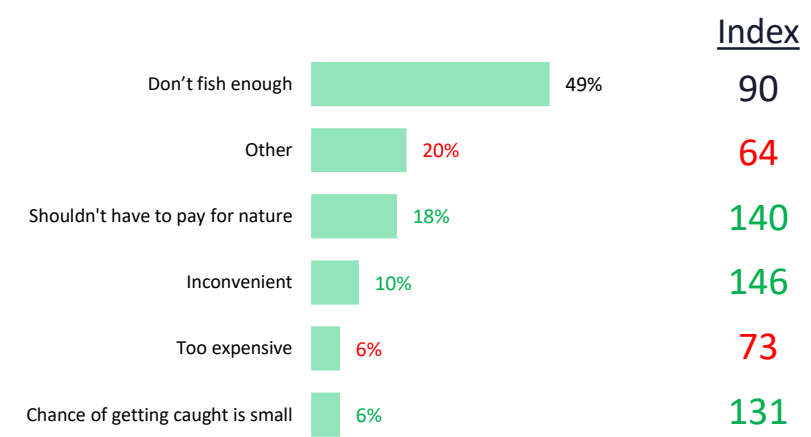
Have Fishing License

78%
Index
121

REASON WHY HAVE



REASON WHY DON'T HAVE



TYPE OF FISHING TRIP

Distance	Percentage	Index
Less than 1 hour	37%	65
1-2 hours	49%	142
3+ hours	13%	176

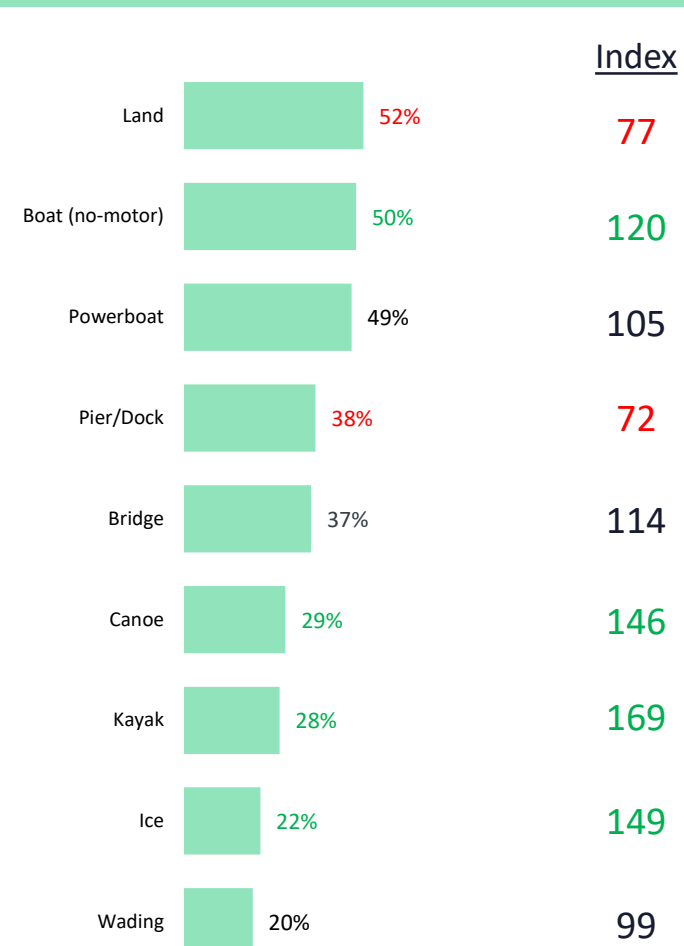
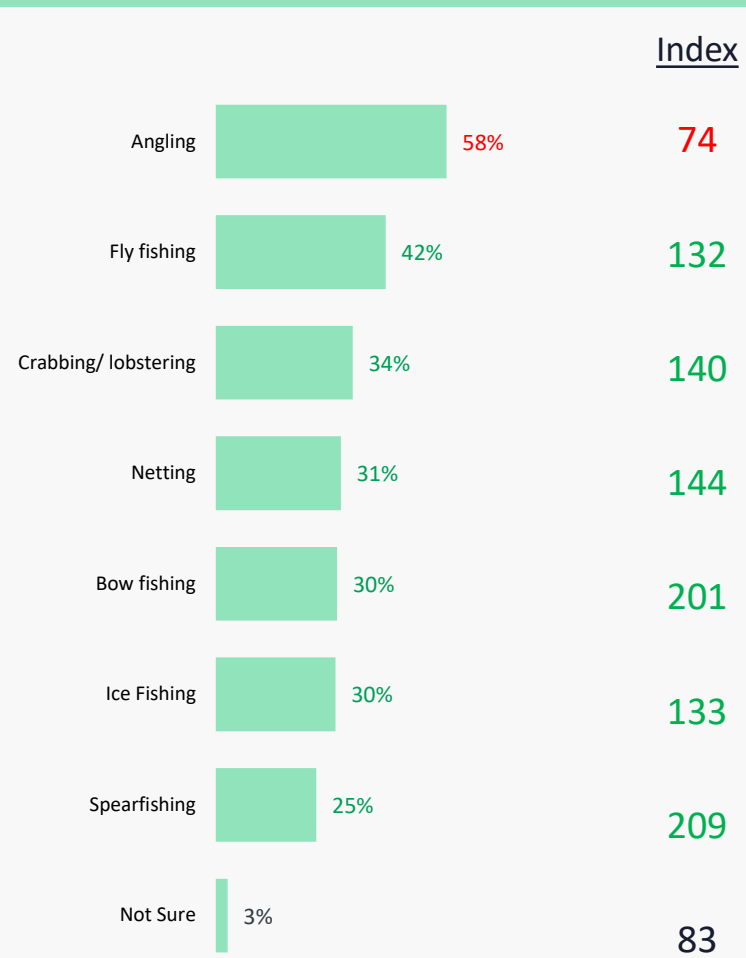
Length	Percentage	Index
Less than 1 day	24%	63
Day trip	44%	101
Weekend trip	26%	171
Longer than weekend	5%	226

TYPE OF FISHING

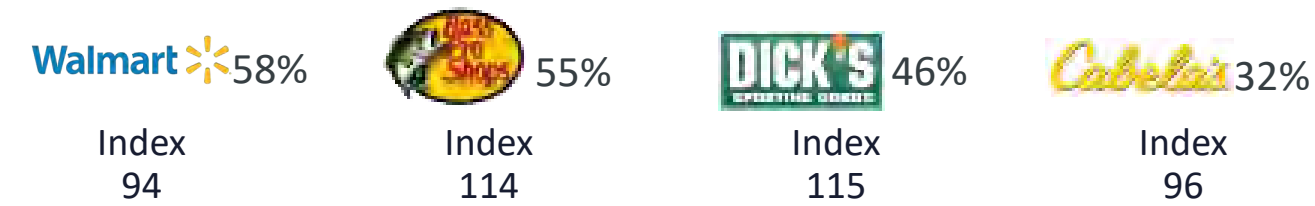
Type	Percentage	Index
For sport	13%	232
For leisure	87%	92

Type	Percentage	Index
Seasonally	37%	86
Year-round	48%	115
Special occasion	15%	98

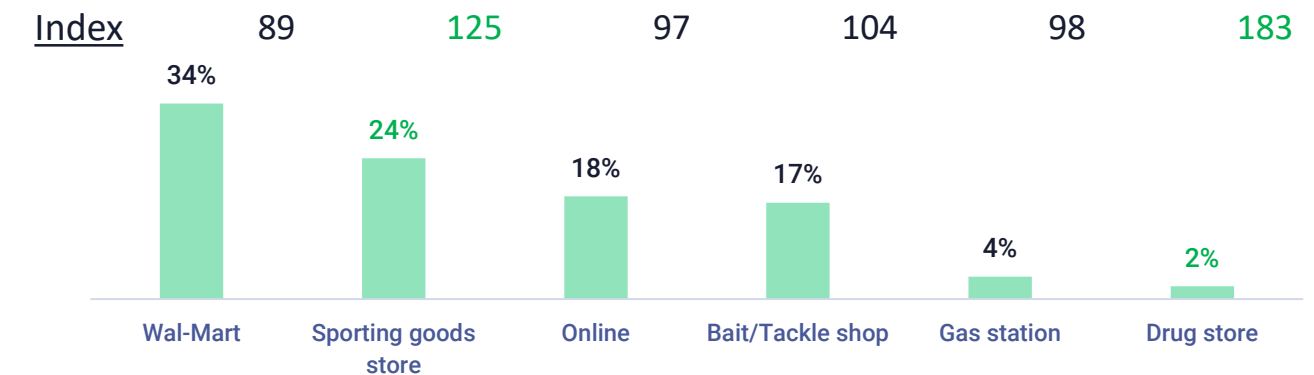
Type	Percentage	Index
Catch and release	38%	75
Keep to eat	62%	126



RETAILERS SHOPPED



LICENSE PURCHASE LOCATIONS



Green indicates over index versus total
Red indicates under index versus total

ACTIVE SOCIAL FAMILIES – Who Are boaters

Just over half of Active Social Families own a boat and enjoy boating on a variety of water types, most typically lakes. Their future interest in boating is strong and they are more likely to have increased their frequency of boating in the past 2 years. They are more likely to be year-around boaters.



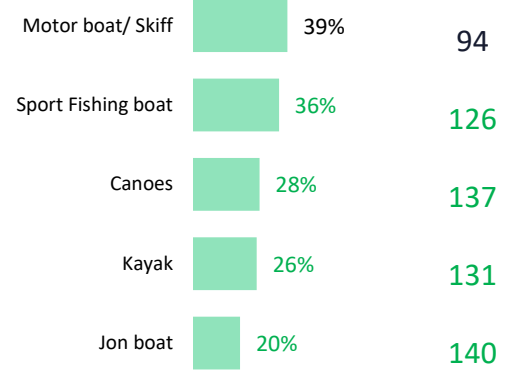
BOATING

Own a Boat

52%

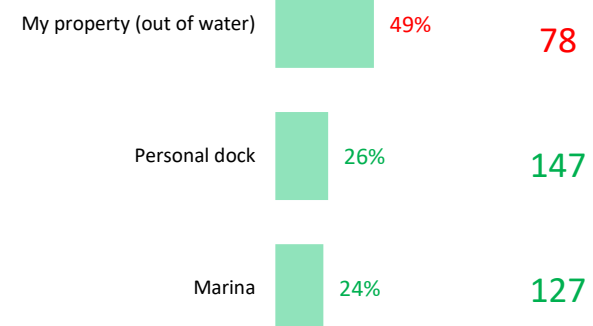
Index
138

TOP 5 BOAT TYPE OWNED



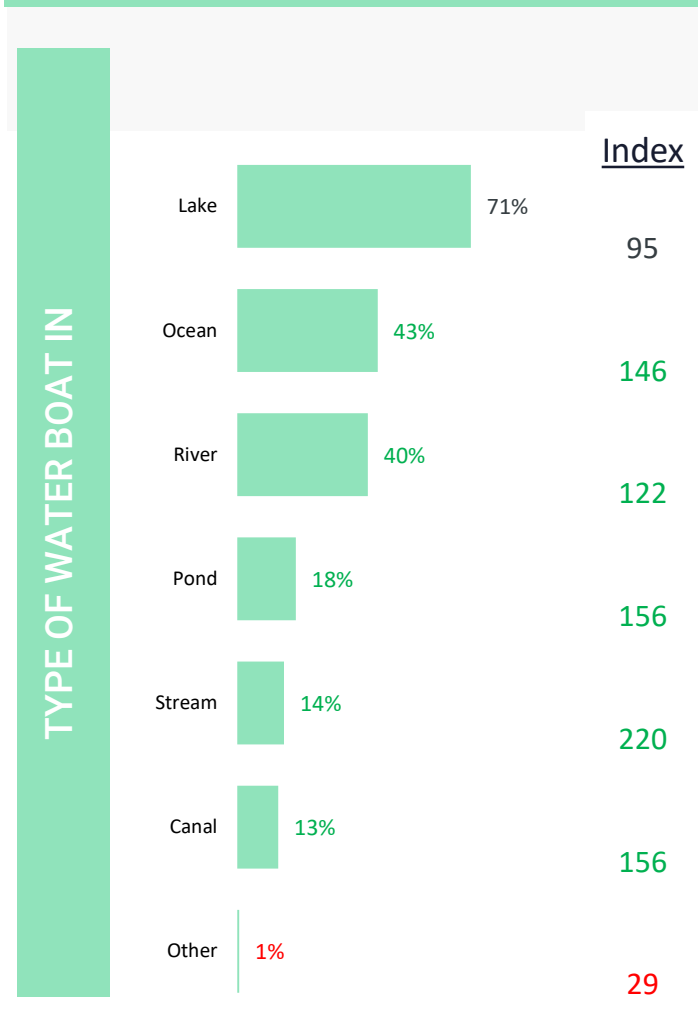
Only Top Responses Shown

WHERE STORE BOAT

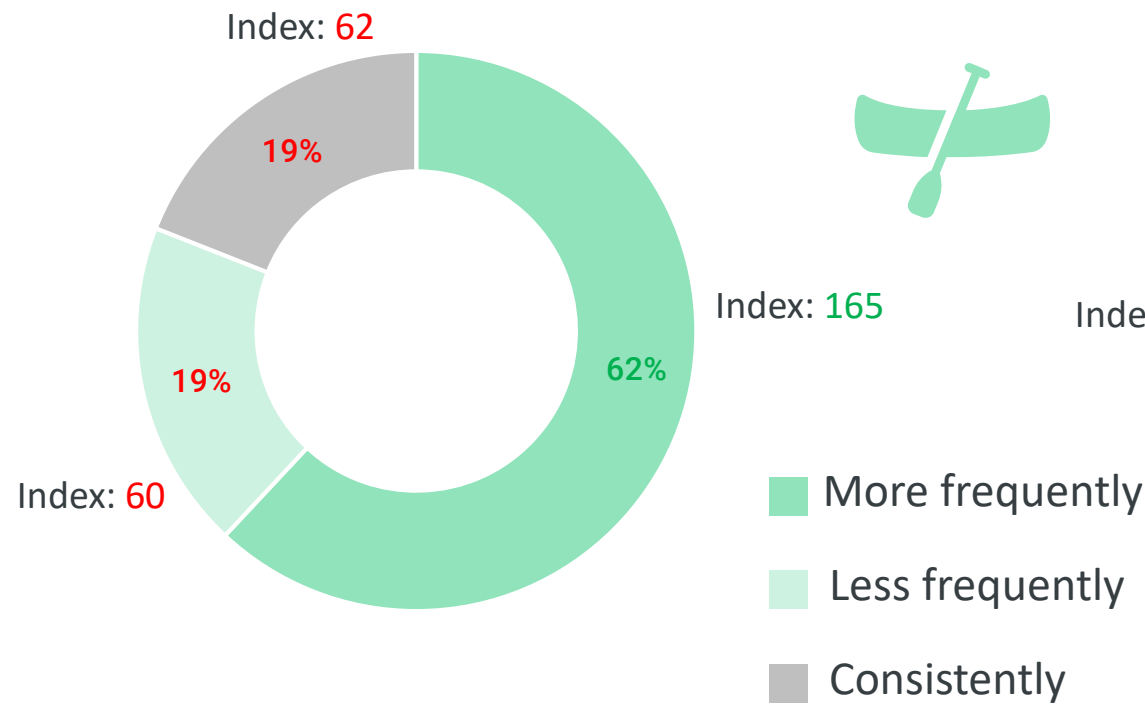


TYPE OF BOATING TRIP

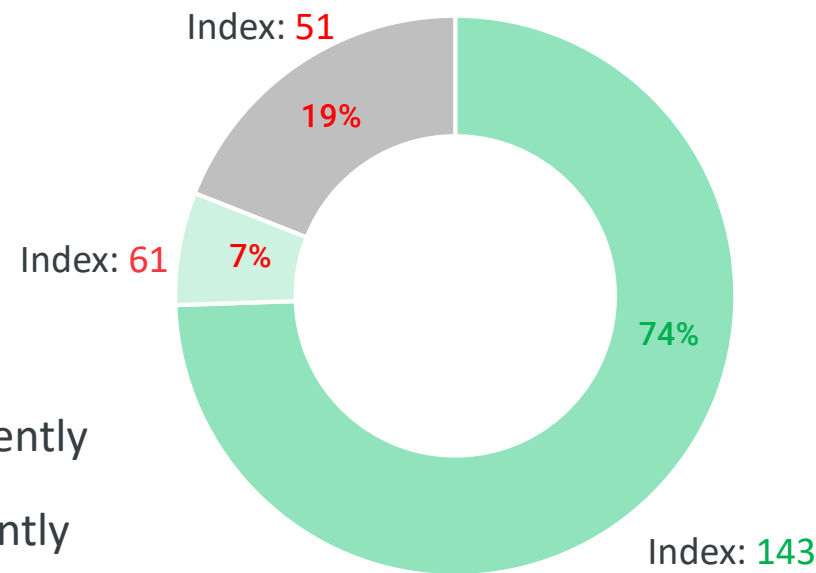
	Percentage	Index
Distance		
Less than 1 hour	48%	94
1-2 hours	36%	98
3+ hours	17%	127
Length		
Day getaway	36%	82
Weekend getaway	34%	93
Part of trip, but not the purpose	30%	72
Morning activity	24%	136
3+ day trip	23%	114
Evening activity	22%	122
Afternoon activity	16%	118
Activity		
Ride around	68%	91
Fish	62%	96
Water sports	54%	115
Anchor and Swim/ Sunbathe	46%	89
Transportation	21%	110



BOATING FREQUENCY P2Y



FUTURE BOATING FREQUENCY

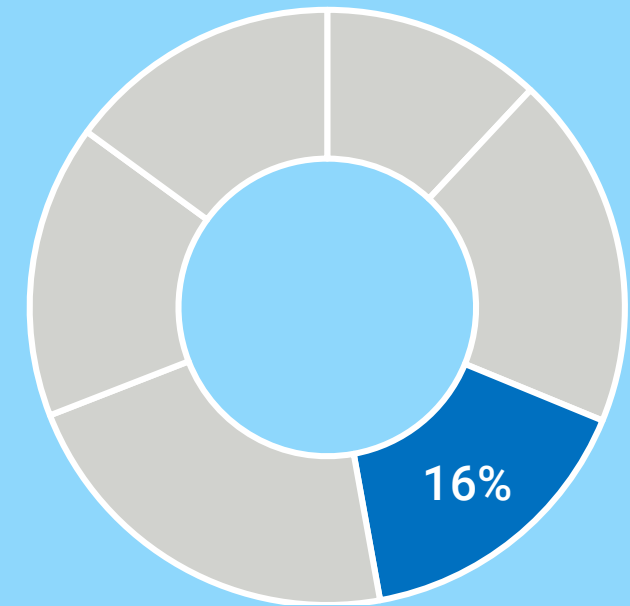


TIME OF YEAR



Green indicates over index versus total
Red indicates under index versus total

TARGET SEGMENT: FAMILY-FOCUSED RELAXERS



KEY ATTITUDE THEMES:

- 1** *Family-Focused relaxers enjoy the outdoors and family time but do so by participating in more relaxed, laid-back activities (e.g. picnicking, parks, beach).*
- 2** *While they are above average anglers & boaters, the benefits they receive from them are about spending time with family and not necessarily about the sport (they don't need to catch a fish to have fun).*
- 3** *Their fishing & boating activity tends to be more seasonal in nature, likely reflecting the business of their family life.*



FAMILY-FOCUSED RELAXERS

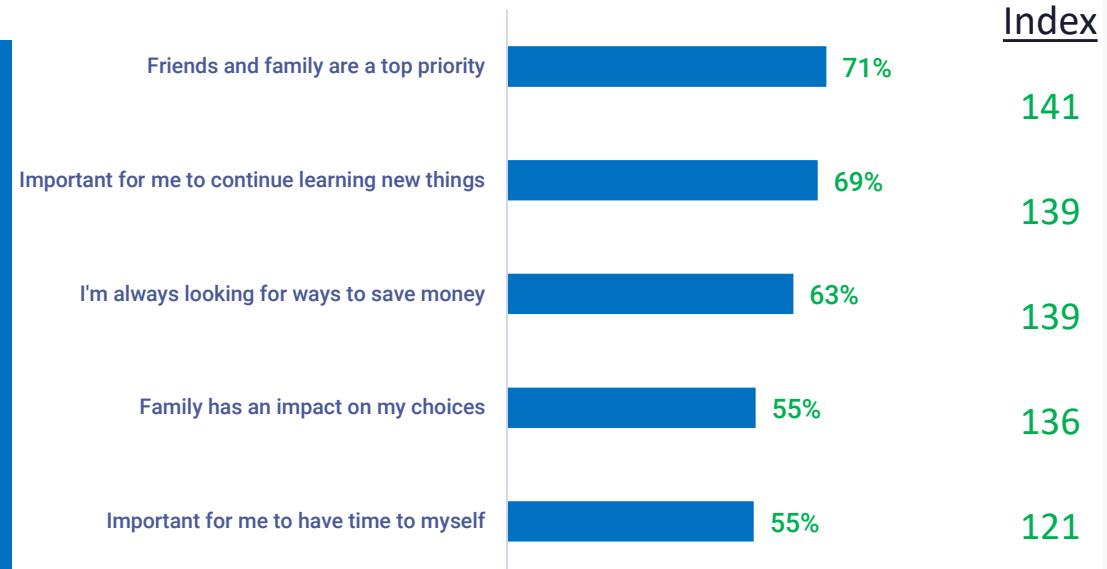
As their name suggests, Family-Focused Relaxers are highly engaged with their families and enjoy a variety of outdoor activities, including fishing and boating. Some of their most enjoyed activities are those of a more relaxed nature – including going to a beach or lake, picnicking and visiting parks. Women make up the strong majority of this segment.



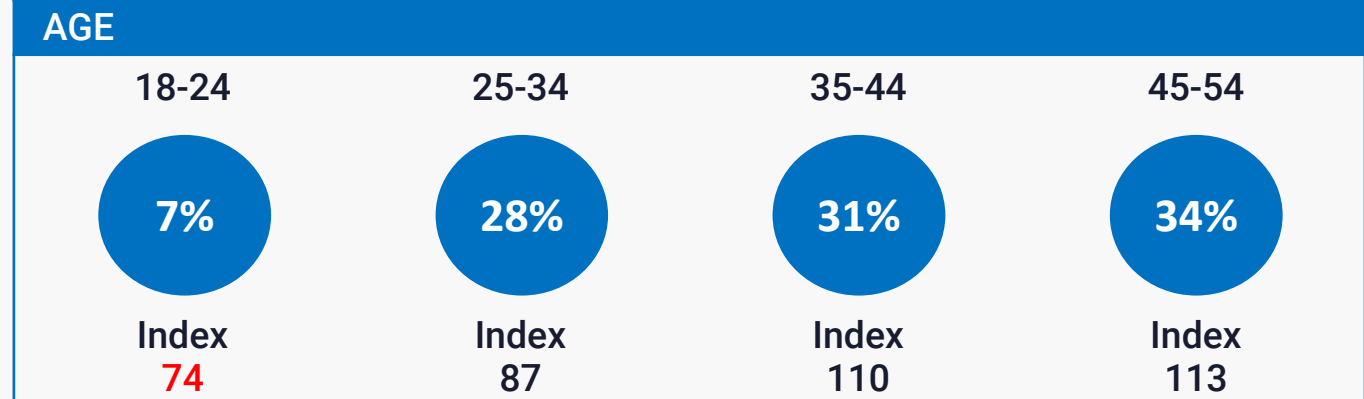
SEGMENT SIZE
(% OF PEOPLE)

16%

TOP ATTITUDES



DEMOGRAPHICS



	Index
GENDER	24% Male/76% Female 57/132
INCOME (mean)	\$75,000 100
MARITAL STATUS	57% Married 107
HH SIZE (mean)	3.3 110
CHILDREN IN HH	53% 109

REGION	Northeast	Midwest	South	West
Percentage	18%	21%	40%	21%
Index	98	98	104	96

RACE	White	Black	Asian	Hispanic
Percentage	79%	7%	1%	7%
Index	109	84	16	67

OUTDOOR ACTIVITY

Only Top Responses Shown

OUTDOOR ACTIVITY ENJOYMENT

Enjoy extremely

Activity	Percentage	Index
Beach	62%	121
Lake/ river	54%	128
Visit parks	49%	131
Tailgating	41%	108
Picnicking	39%	124
Wildlife/ bird watching	37%	102
Gardening	36%	122
Boating	35%	101
Four-wheeling	35%	95
Hiking	34%	117
Jet-Skiing	34%	95
Camping	30%	94

OUTDOOR ACTIVITY INTEREST

Very interested

Activity	Percentage	Index
Beach	81%	131
Lake/ river	76%	152
Visit parks	72%	148
Picnicking	60%	151
Hiking	47%	147
Camping	47%	130
Gardening	45%	136
Boating	42%	122
Wildlife/ bird watching	38%	142
Canoeing or kayaking	35%	130
Fishing	35%	108
Tailgating	33%	108

BOATERS

3.3

Avg. # times boat per year

28%

Index 118

Index 92

ANGLERS

4.3

Avg. # times fish per year

40%

Index 120

Index 92

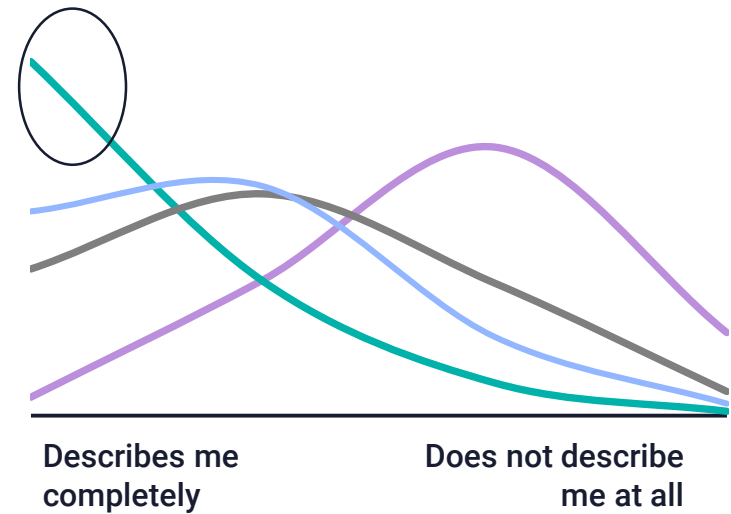
ANGLERS & BOATERS

19%

Index 117

FAMILY-FOCUSED RELAXERS

Family-Focused Relaxers enjoy a wide variety of hobbies in the home as well, including cooking reading and arts/crafts. Their fitness activities skew to gym workouts, yoga and low impact exercise. They are heavier Pinterest users and avid readers from fiction to current events to entertainment – on and offline.



Don't consider myself an "avid outdoorsman" Mean 4.1 Index 116

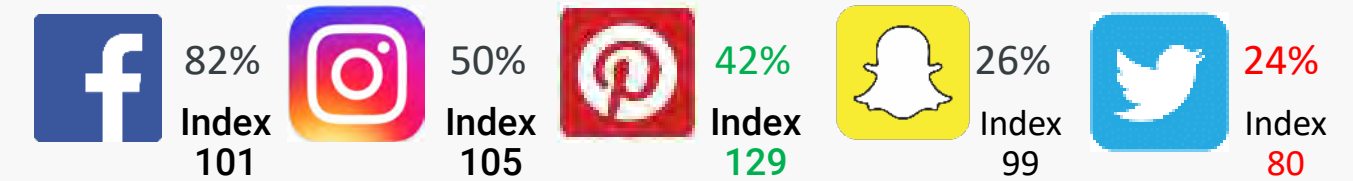
I would consider myself an outdoor enthusiast Mean 3.1 Index 96

I enjoy participating in outdoor activities with my family Mean 4.6 Index 114

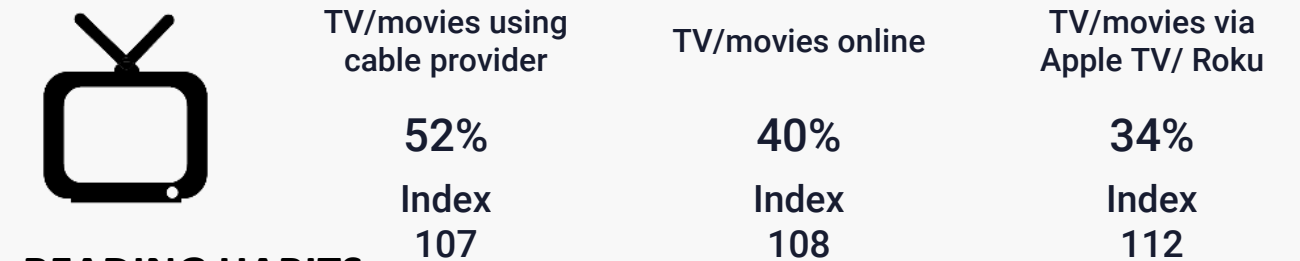
I participate in outdoor activities for adventure & excitement Mean 3.9 Index 106

I enjoy the social and adventure aspects of outdoor activities Mean 4.2 Index 110

TOP 5 SOCIAL MEDIA SITES USED



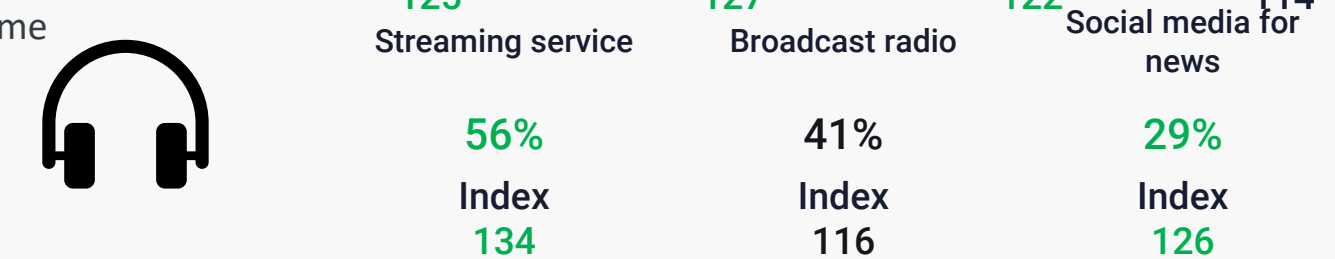
TELEVISION HABITS



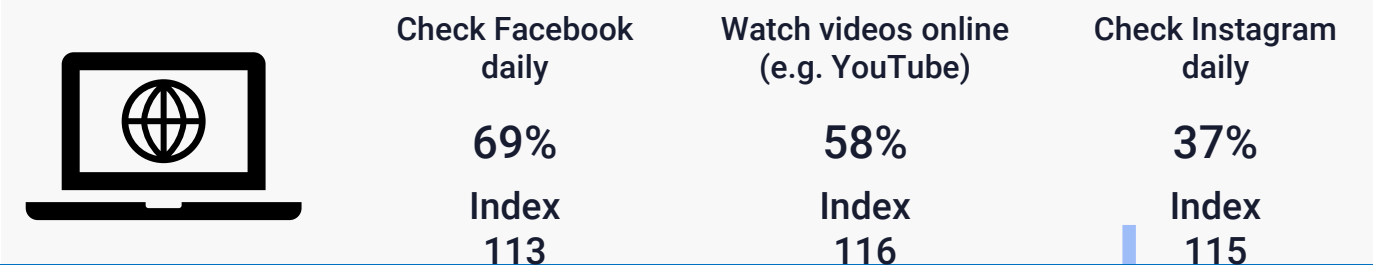
READING HABITS



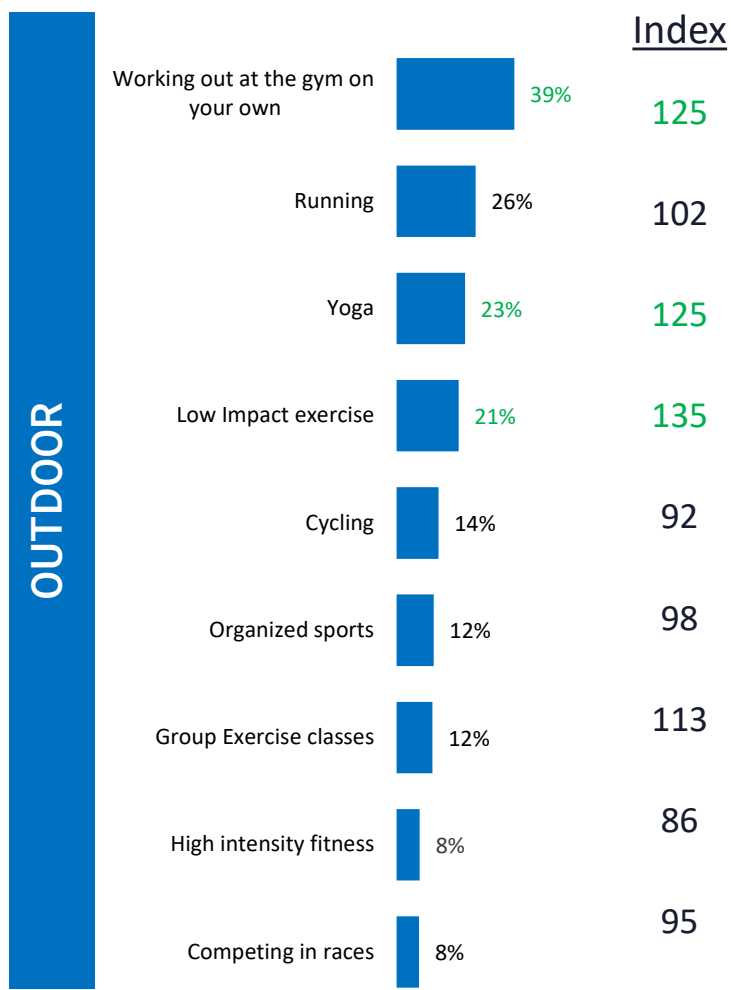
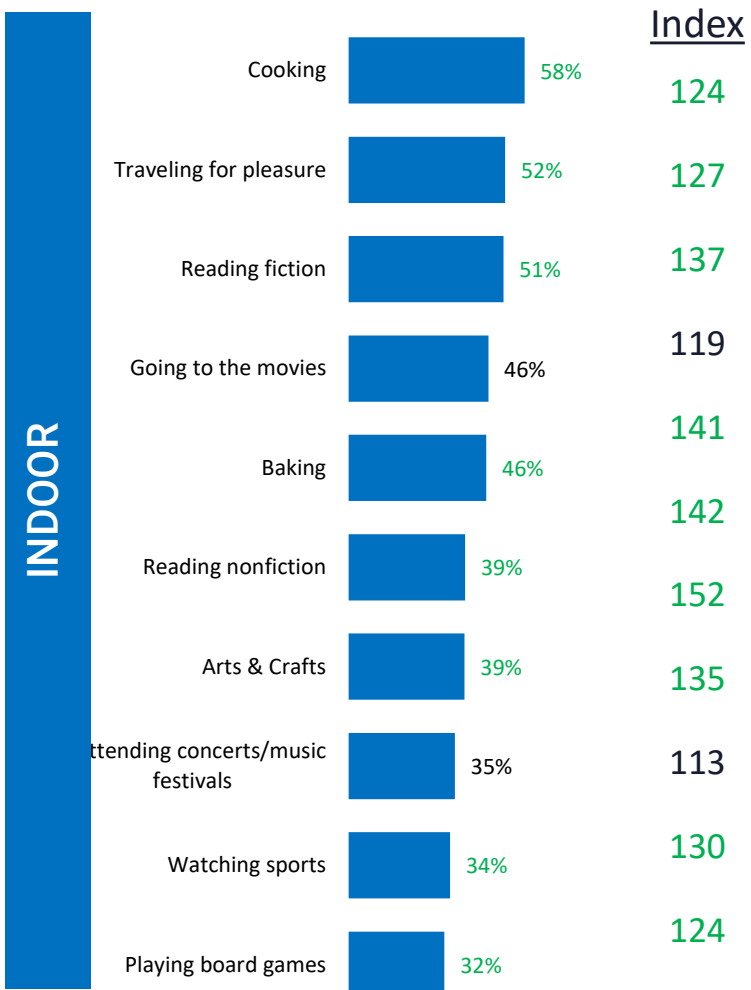
LISTENING HABITS



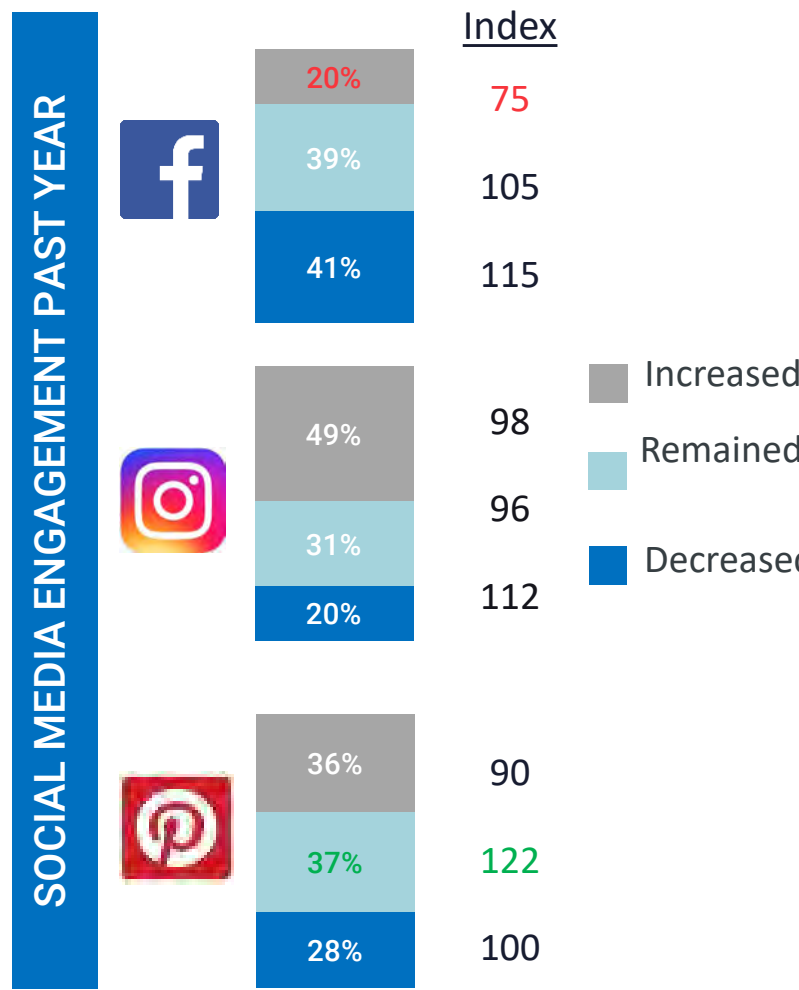
INTERNET BROWSING HABITS



HOBBIES



Only Top Responses Shown

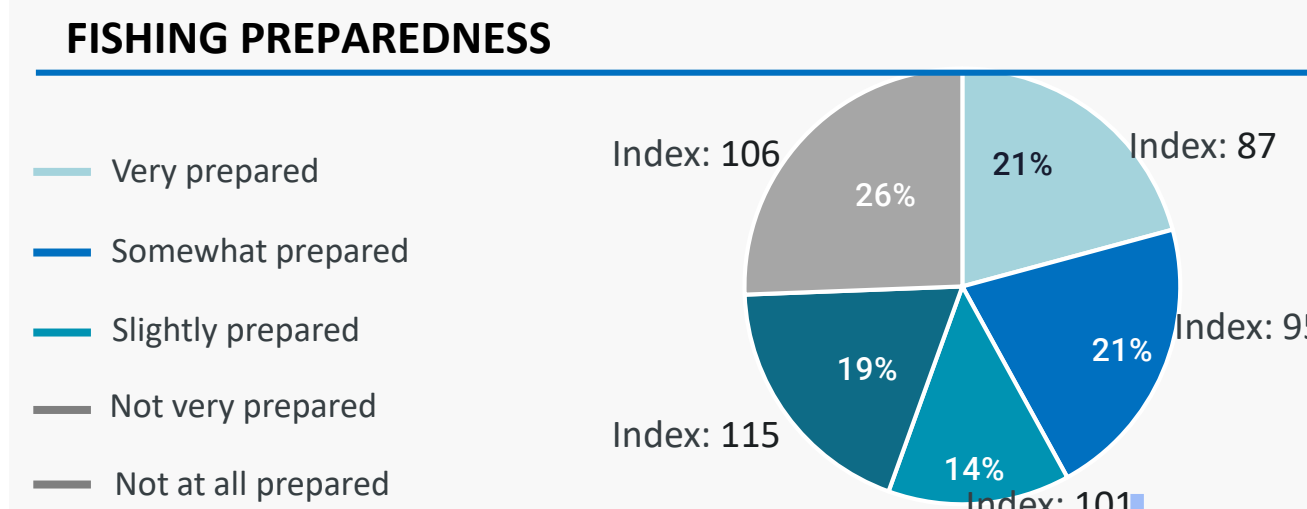
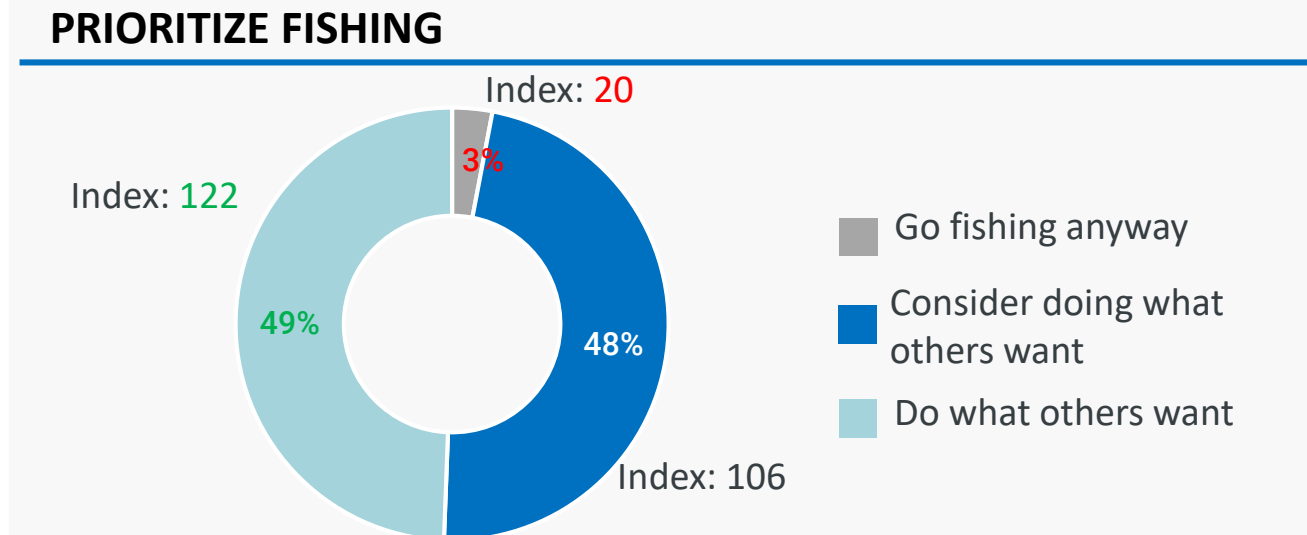
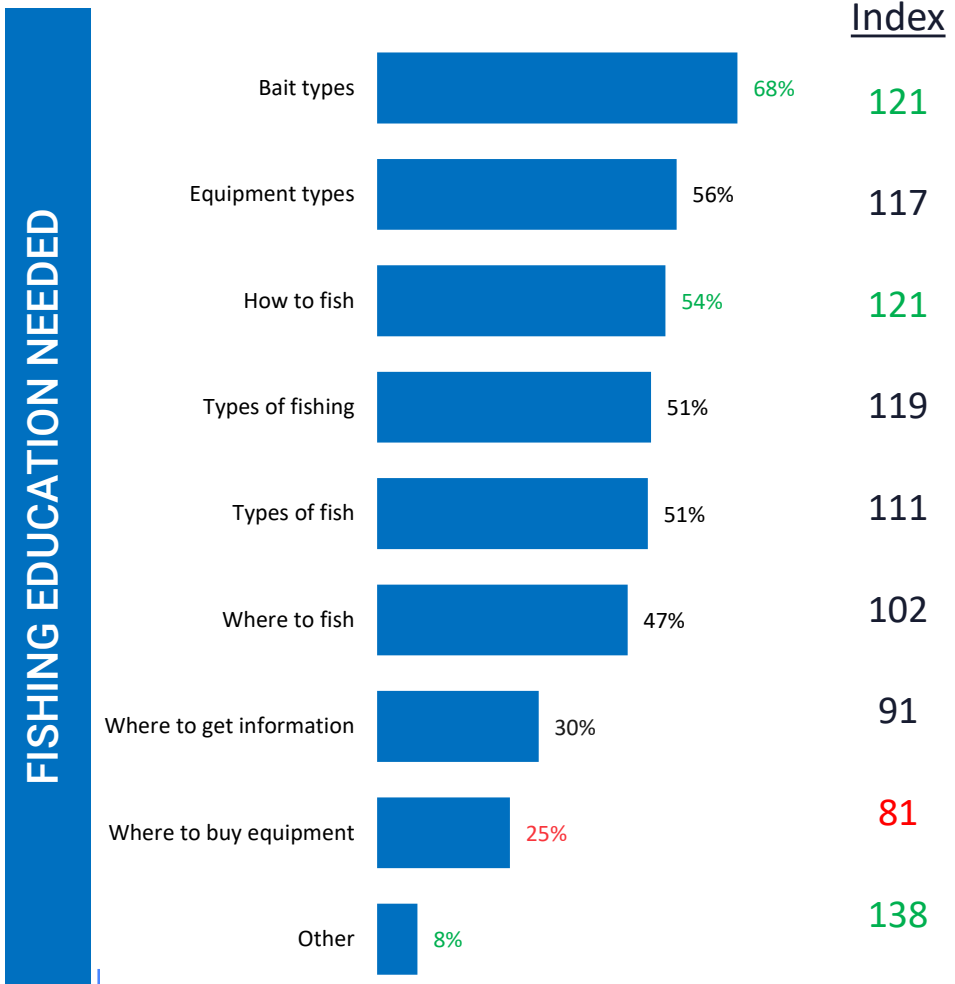
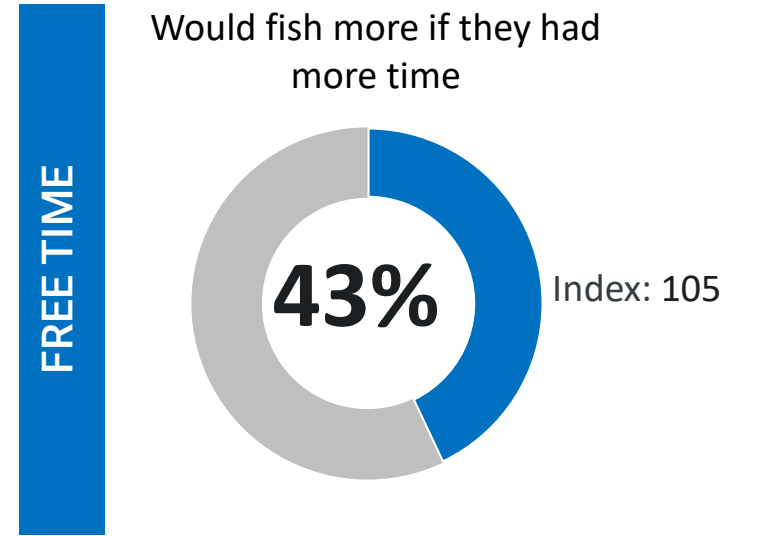
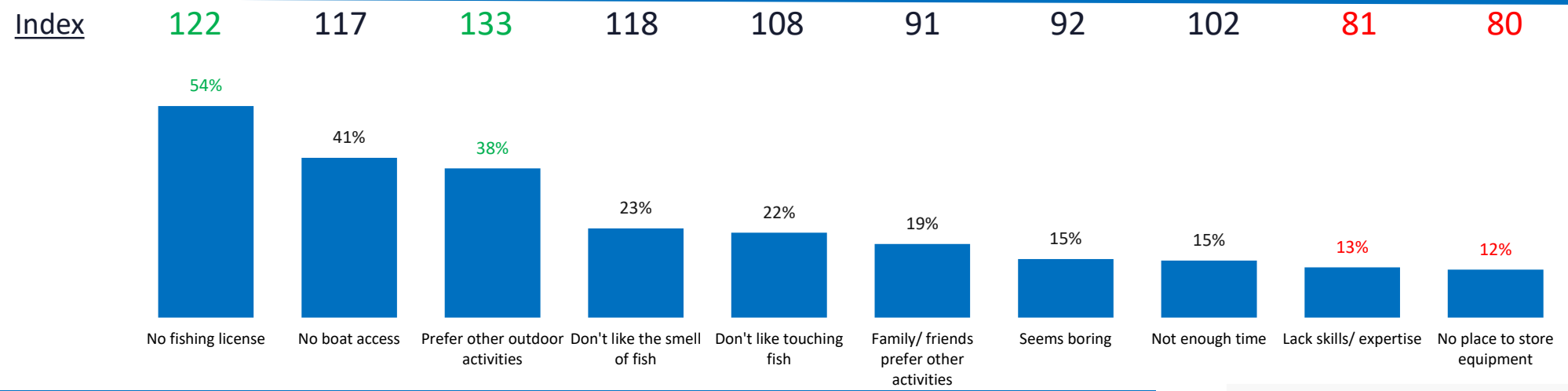


FAMILY-FOCUSED RELAXERS

Top fishing barriers for the Family-Focused Relaxers are not having a fishing license, not having access to a boat and given their interest in other types of outdoor activities, preference to spend time in those vs. fishing. Additionally, Family-Focused Relaxers tend to defer to others' wishes when they want to go fishing but their family/friends do not.



TOP FISHING BARRIERS (Completely Agree)

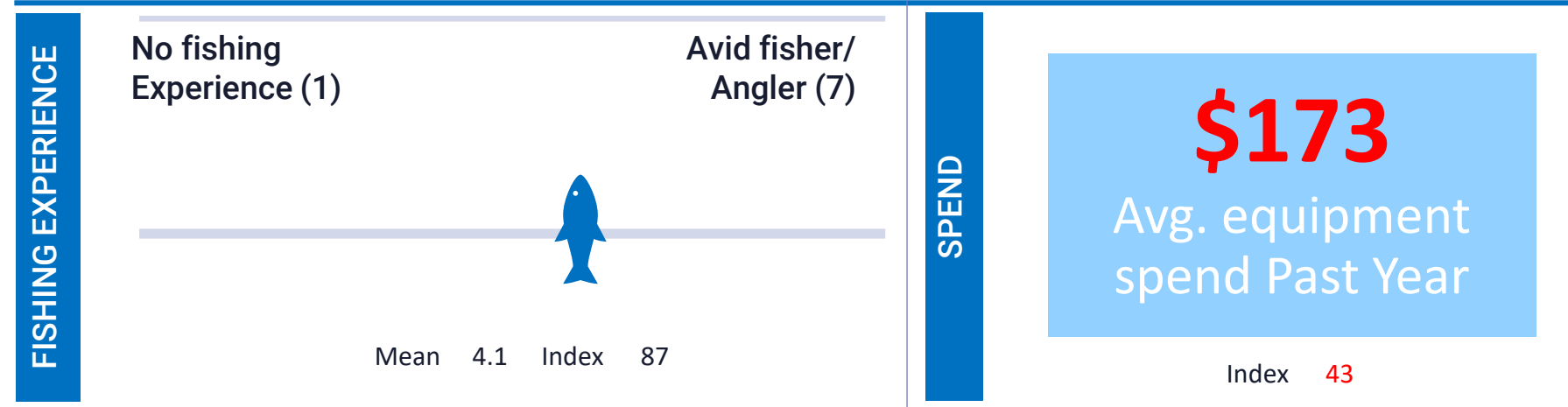


FAMILY-FOCUSED RELAXERS – Who Are Anglers

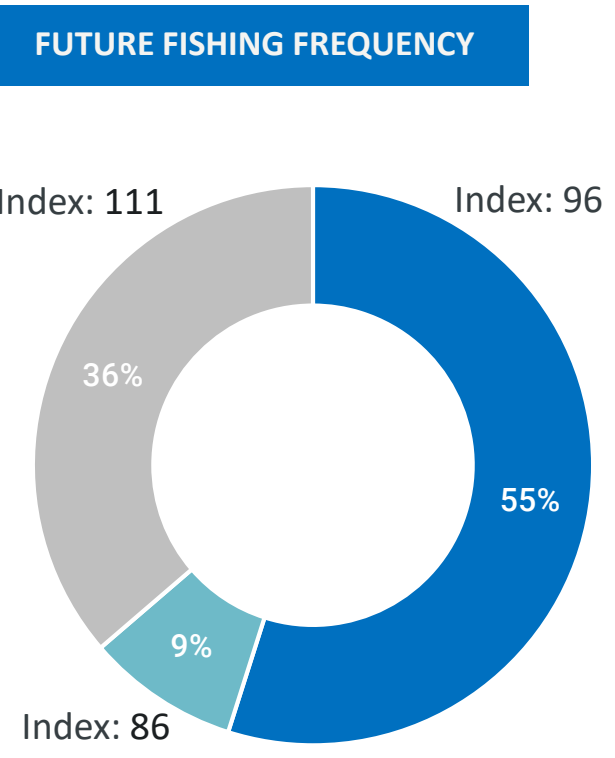
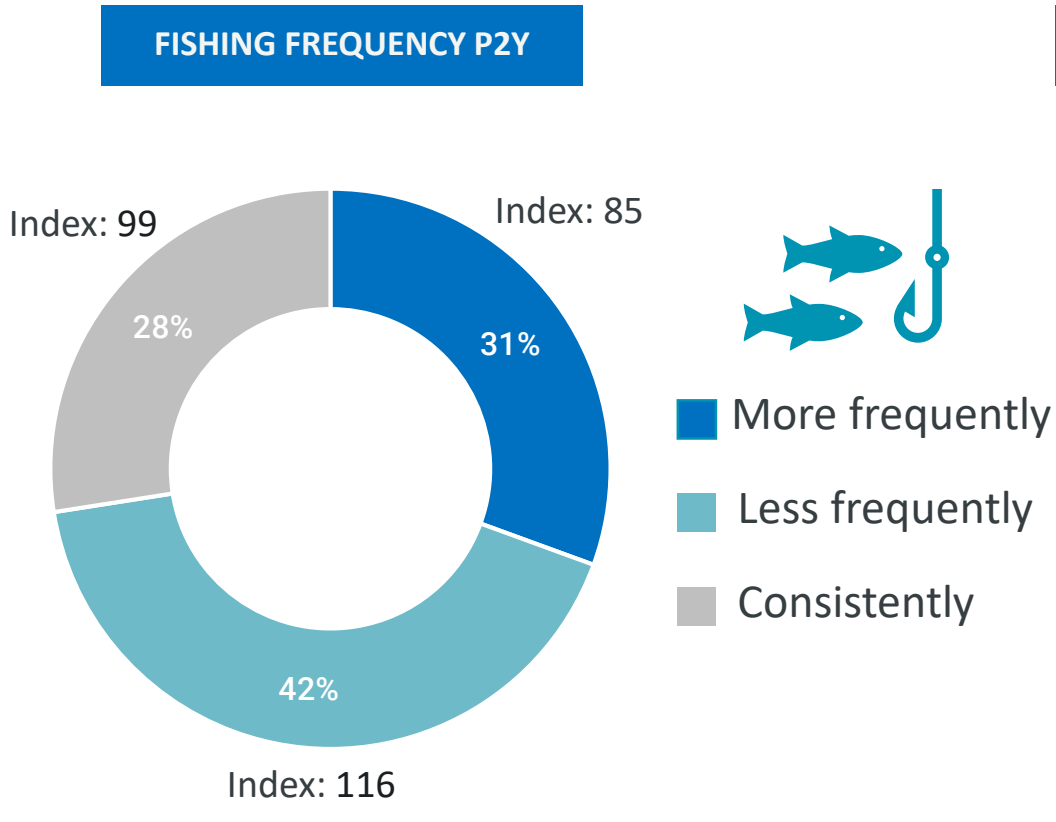
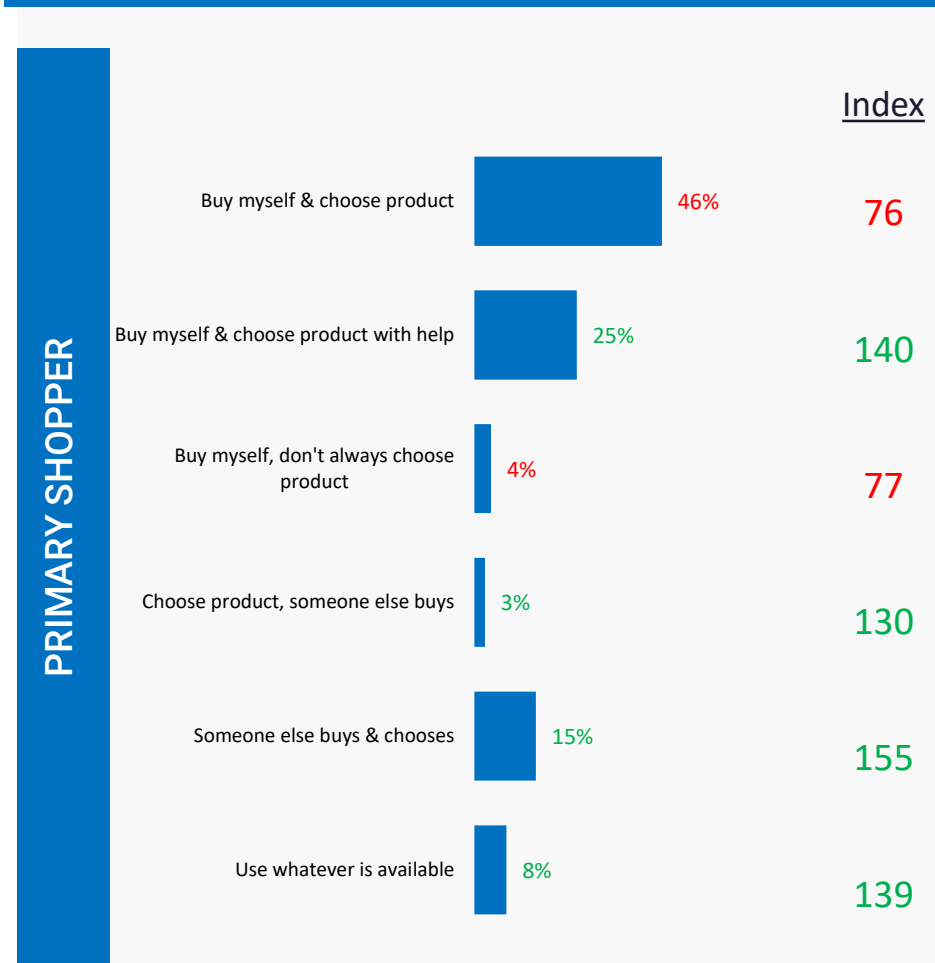
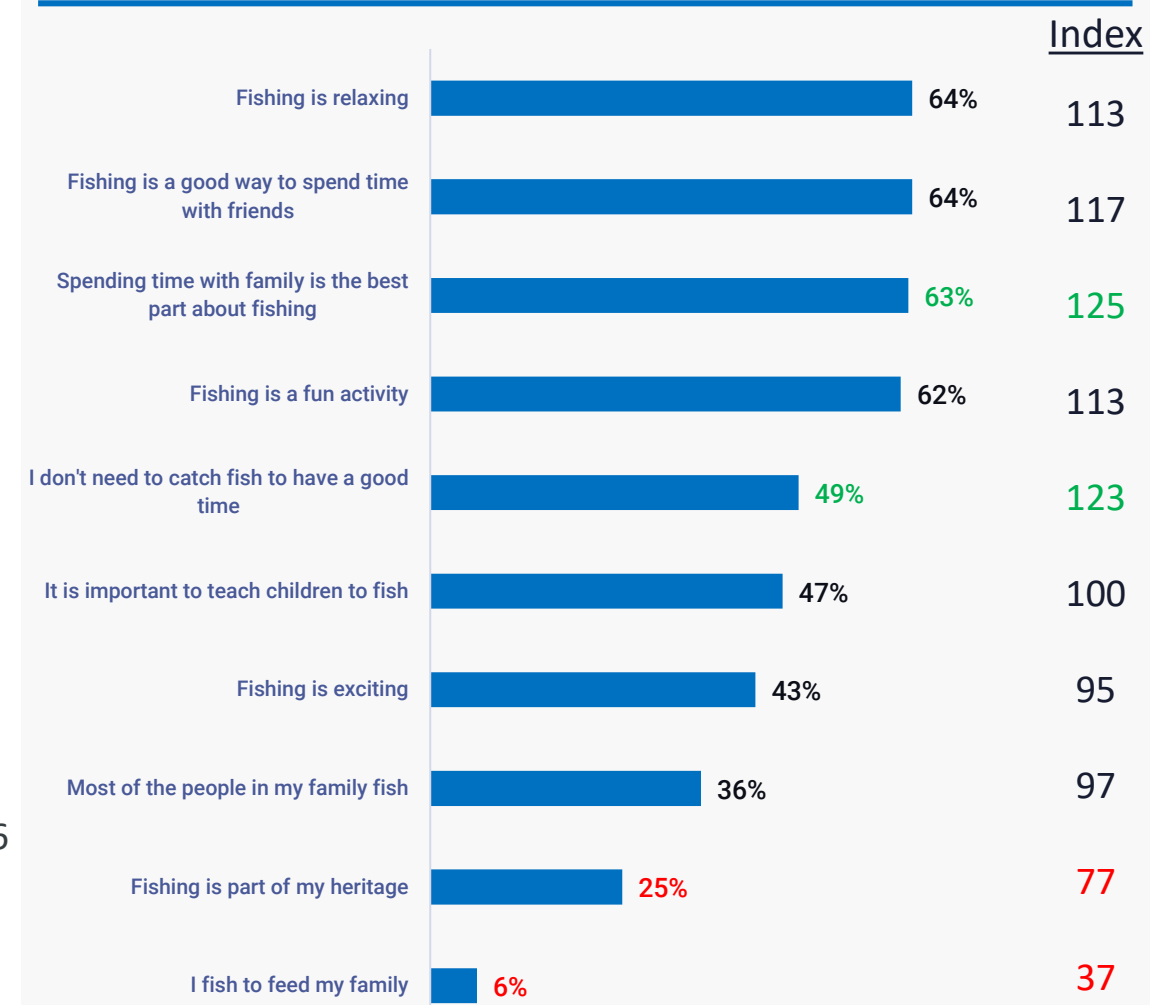
Family-Focused Relaxers are below average spenders on fishing equipment in the past year. While they have some experience with fishing, they are more likely than others to require some help in choosing products. For them, fishing is rewarding because of the quality time they get to spend with family – whether or not they catch any fish.



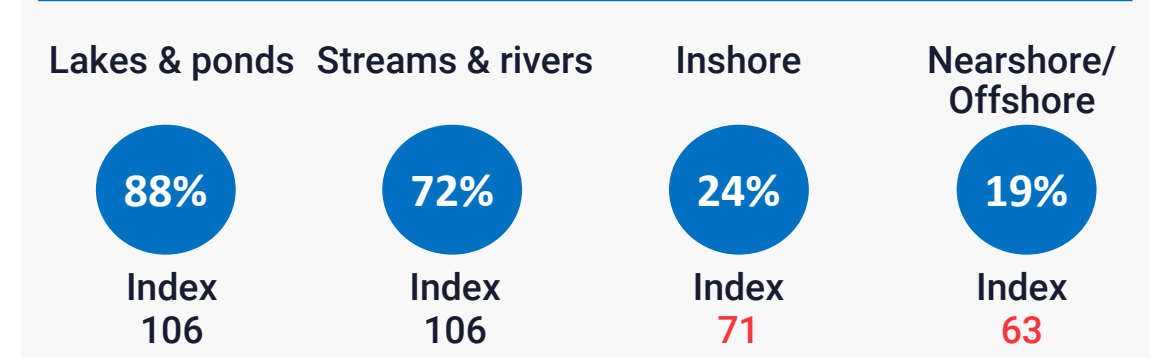
FISHING



FISHING STATEMENT AGREEMENT *(Completely agree)*



TYPE OF WATER



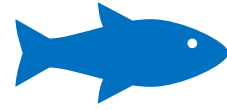
Green indicates over index versus total
Red indicates under index versus total

FAMILY-FOCUSED RELAXERS – Who Are anglers

Just over half of Family-Focused Relaxers who are anglers have a fishing license and their fishing trips typically skew to less than a day at a short distance (less than 1 hr). They are predominantly anglers and typically underindex on all other types of fishing.



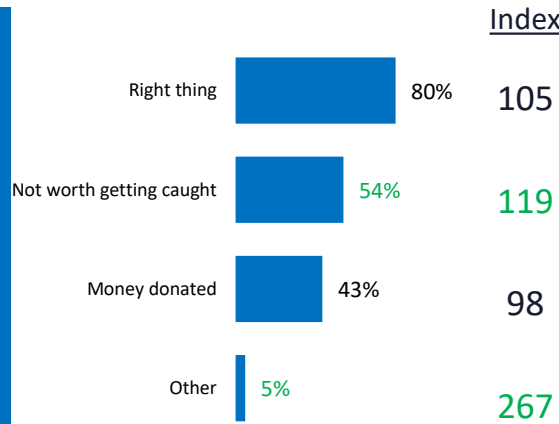
FISHING



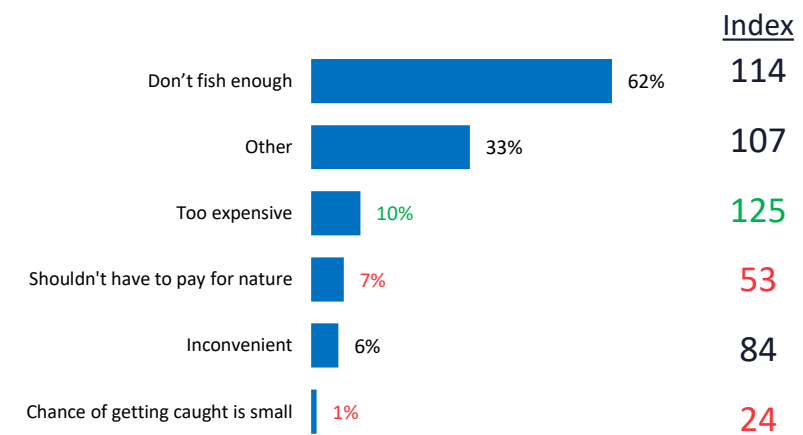
Have Fishing License

54%
Index 83

REASON WHY HAVE



REASON WHY DON'T HAVE



TYPE OF FISHING TRIP

Distance	Percentage	Index
Less than 1 hour	73%	127
1-2 hours	20%	58
3+ hours	7%	88

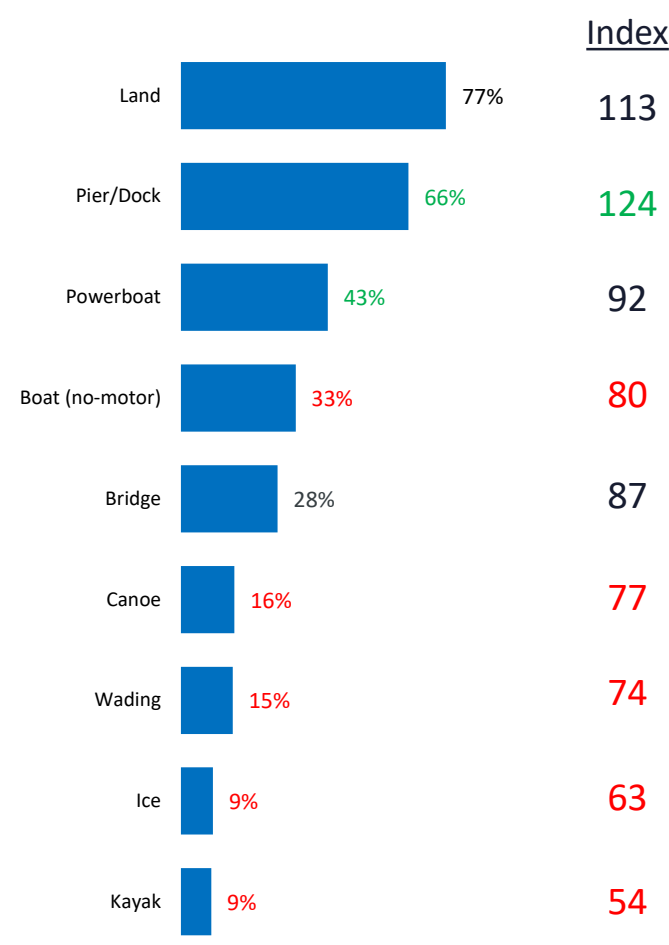
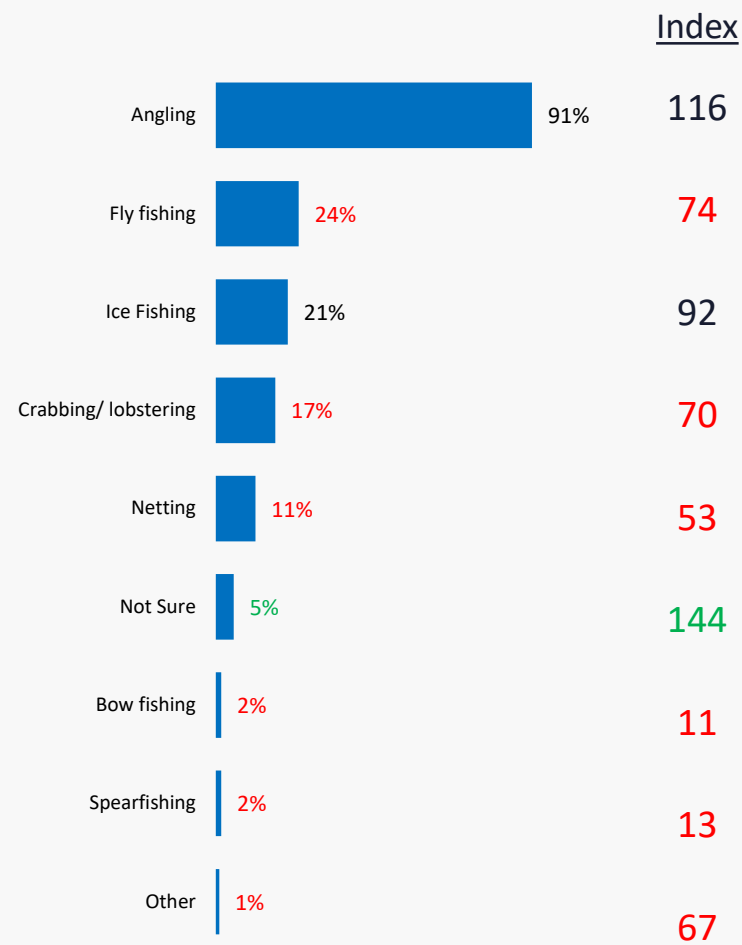
Length	Percentage	Index
Less than 1 day	52%	136
Day trip	42%	95
Weekend trip	5%	34
Longer than weekend	1%	43

TYPE OF FISHING

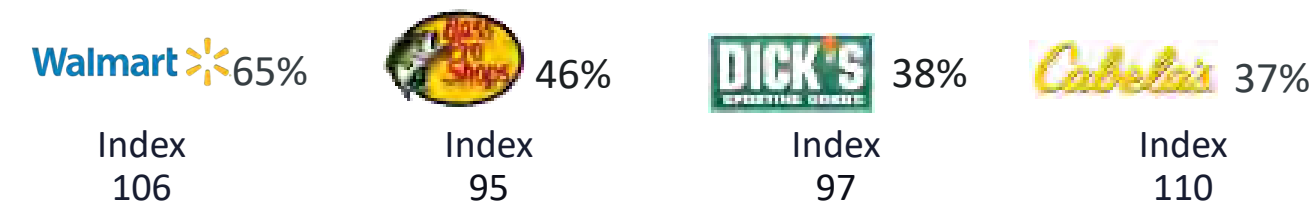
Type	Percentage	Index
For sport	0%	N/A
For leisure	100%	106

Type	Percentage	Index
Seasonally	48%	113
Year-round	34%	80
Special occasion	18%	117

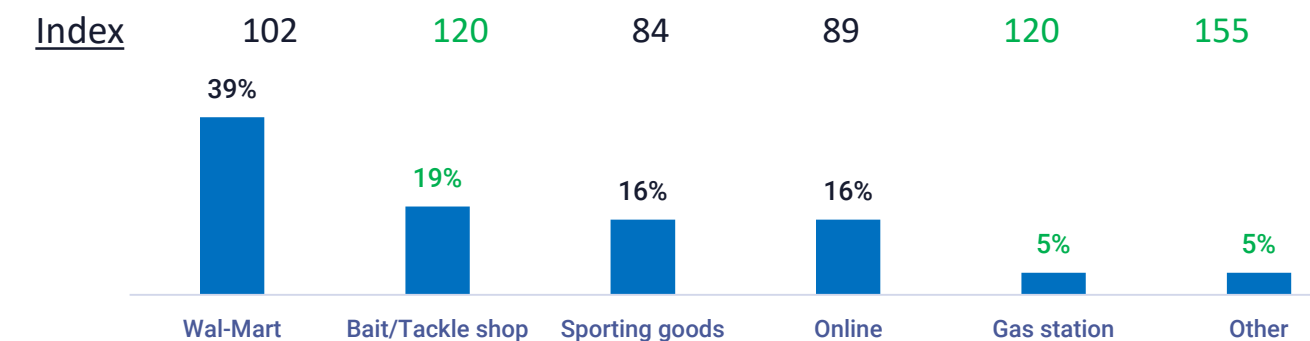
Type	Percentage	Index
Catch and release	60%	118
Keep to eat	40%	82



RETAILERS SHOPPED



LICENSE PURCHASE LOCATIONS



Green indicates over index versus total
Red indicates under index versus total

FAMILY-FOCUSED RELAXERS – Who Are boaters

One-third of Family-Focused Relaxers who are boaters actually own their own boat, most typically a motor boat. Lake boating is most common for this segment and is mainly done on a seasonal vs. year-round basis. Anchoring and swimming/sunbathing is a common activity while boating and consistent with their more relaxed lifestyles.



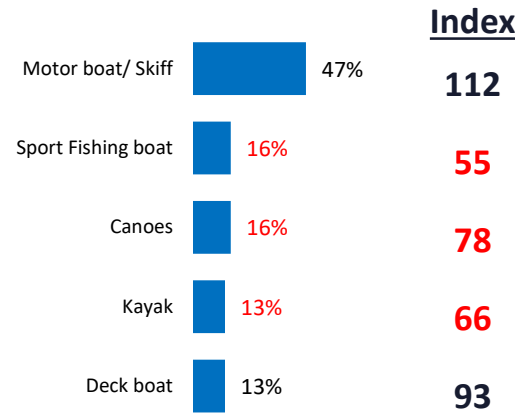
BOATING

Own a Boat

33%

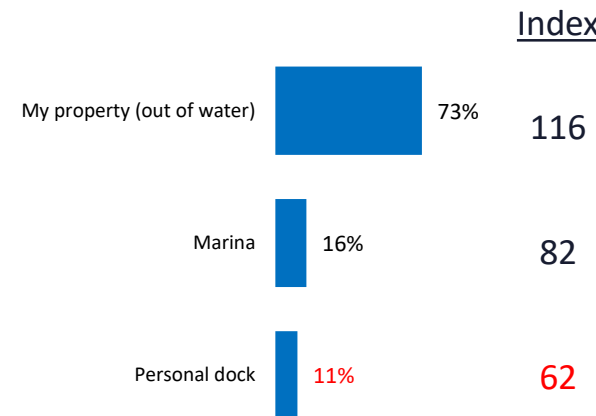
Index 87

TOP 5 BOAT TYPE OWNED



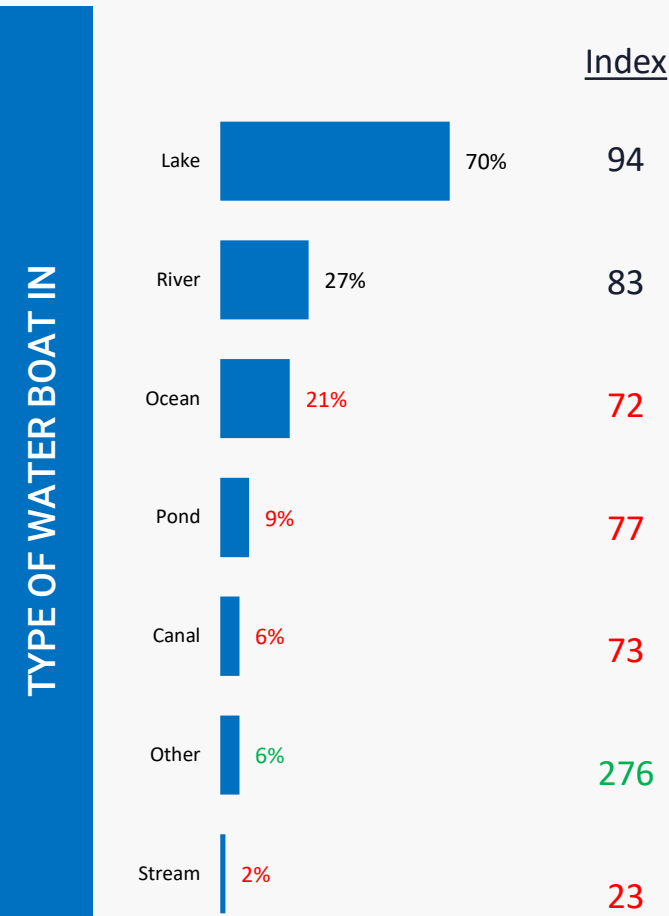
Only Top Responses Shown

WHERE STORE BOAT

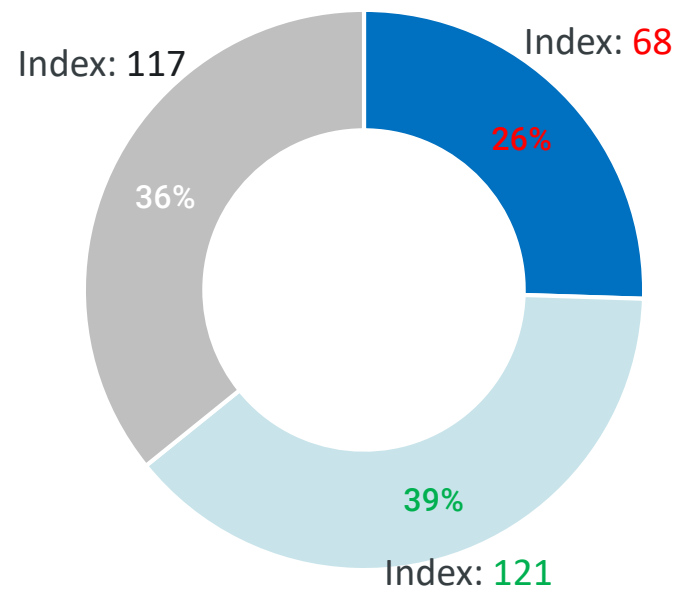


TYPE OF BOATING TRIP

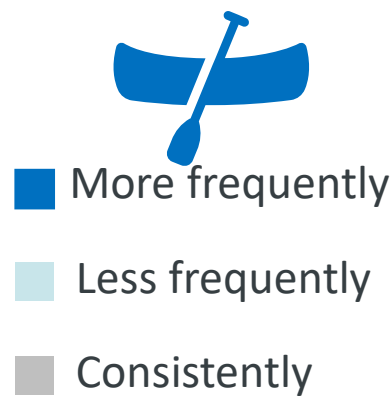
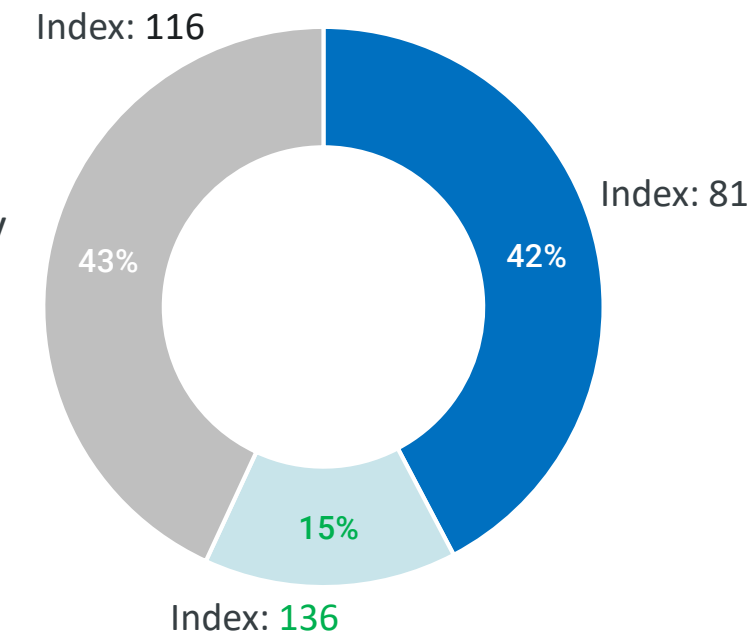
Distance	Percentage	Index
Less than 1 hour	55%	109
1-2 hours	31%	84
3+ hours	15%	111
Length		
Day getaway	58%	133
Part of trip, but not the purpose	51%	123
Weekend getaway	44%	121
3+ day trip	24%	118
Activity		
Ride around	86%	116
Fish	67%	105
Anchor and Swim/ Sunbathe	64%	124
Water sports	47%	100
Transportation	18%	90
Other	3%	242



BOATING FREQUENCY P2Y



FUTURE BOATING FREQUENCY



TIME OF YEAR

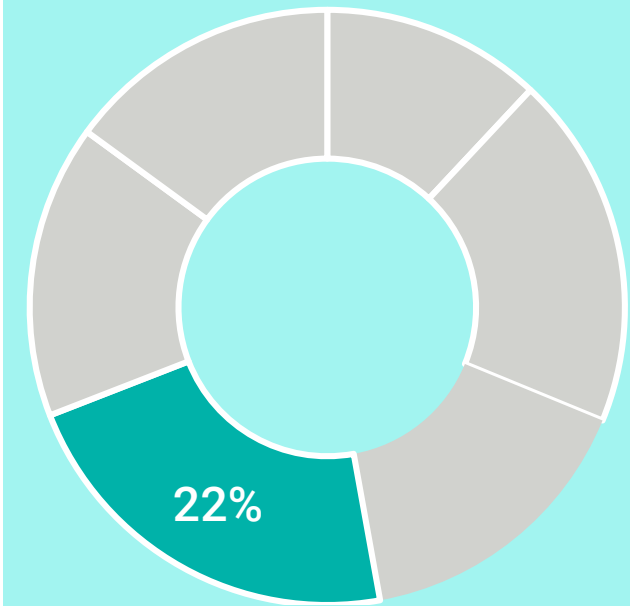


Green indicates over index versus total
Red indicates under index versus total

Non-Target Segment Details



TARGET SEGMENT: LEISURE-TIME ENJOYERS



KEY ATTITUDE THEMES:

- 1** *Leisure-Time Enjoyers aren't particularly fond of the outdoors, and when they do go outside, they like to take it easy – going to a beach or lake or visiting a park.*
- 2** *This segment is less interested in fishing and boating and less likely to be active anglers and boaters. There are a variety of strong barriers keeping them from fishing, which speaks to their overall lack of interest.*
- 3** *Their lack of interest in fishing & boating may also stem from a lack of interest in physical activity – as they are less likely to engage in any physical fitness.*



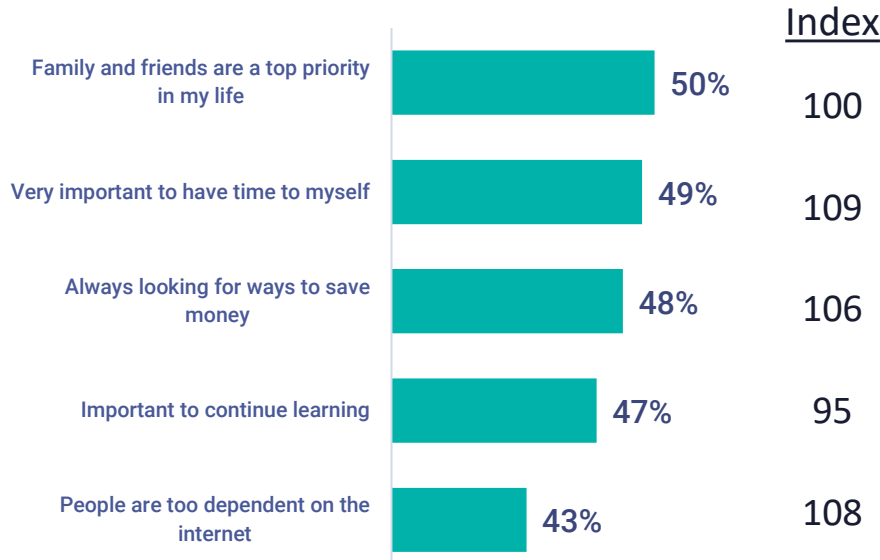
LEISURE-TIME ENJOYERS

Leisure-Time Enjoyers have average interest in the outdoors, but interest and participation in boating and fishing is below average. Those activities that they gravitate to are more leisurely, including going to the beach or lake, visiting parks and bird or wildlife watching. Leisure-Time Enjoyers are mostly women.

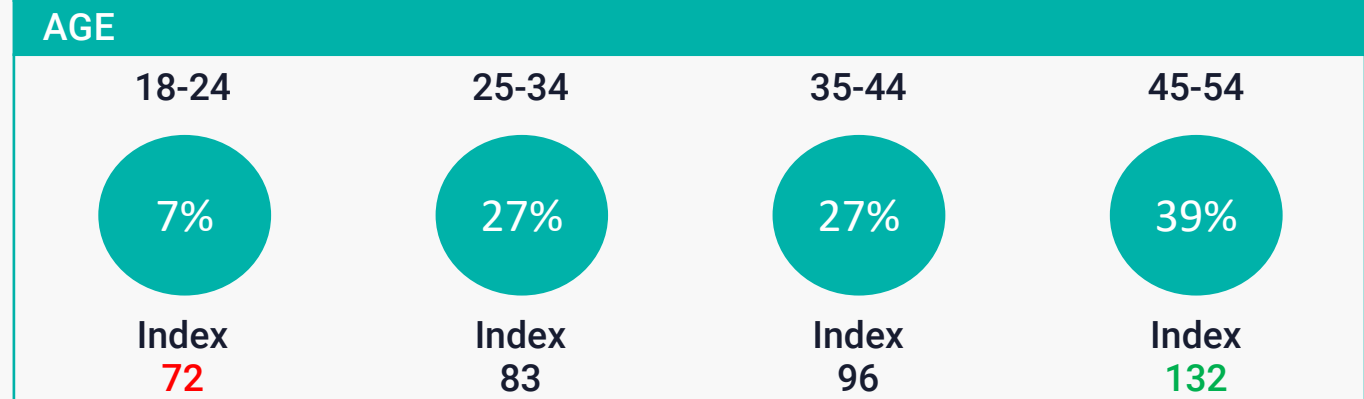


SEGMENT SIZE
(% OF PEOPLE)
22%

TOP ATTITUDES
(Completely Agree)

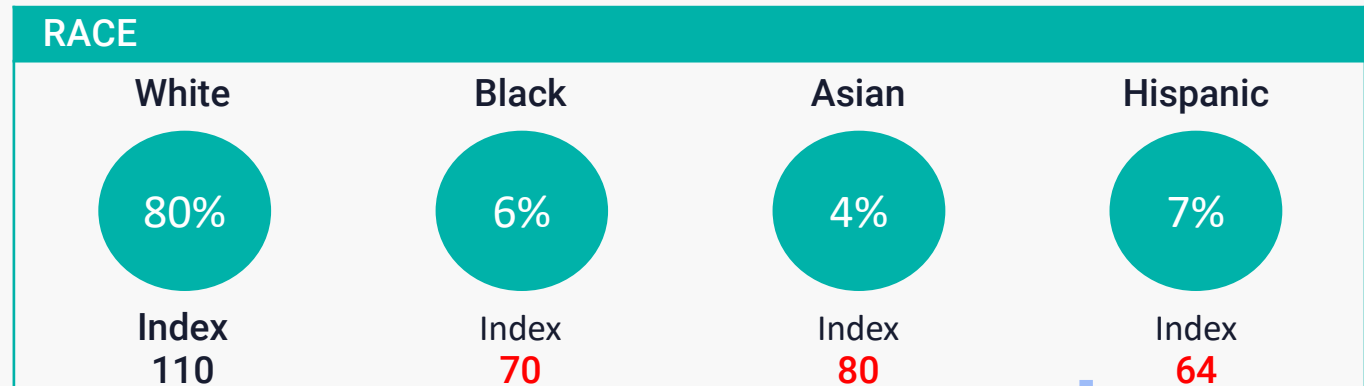


DEMOGRAPHICS



	Index
GENDER	28% Male/ 73% Female 65/ 126
INCOME (mean)	\$77,400 104
MARITAL STATUS	53% Married 100
HH SIZE (mean)	3.1 101
CHILDREN IN HH	44% 90

REGION	Northeast	Midwest	South	West
Percentage	19%	25%	33%	22%
Index	103	118	86	104



OUTDOOR ACTIVITY

Only Top Responses Shown

OUTDOOR ACTIVITY ENJOYMENT

Enjoy extremely

Activity	Percentage	Index
Beach	45%	87
Wildlife/bird watching	32%	89
Lake/river	29%	69
Tailgating	27%	72
Visit parks	26%	69
Jet skiing	25%	71
Target shooting	25%	76
Motorcycling	23%	68
Picnicking	22%	71
Four-wheeling	22%	58
Boating	19%	54
Gardening	17%	57

OUTDOOR ACTIVITY INTEREST

Activity	Percentage	Index
Beach	66%	107
Visit parks	48%	99
Lake/ river	48%	95
Picnicking	33%	84
Gardening	25%	77
Boating	24%	70
Camping	24%	66
Tailgating	23%	75
Hiking	22%	67
Fishing	19%	58
Wildlife/ bird watching	18%	67
Horseback Riding	18%	73

BOATERS

15% Avg. # times boat per year
Index **64** Index **49**

ANGLERS

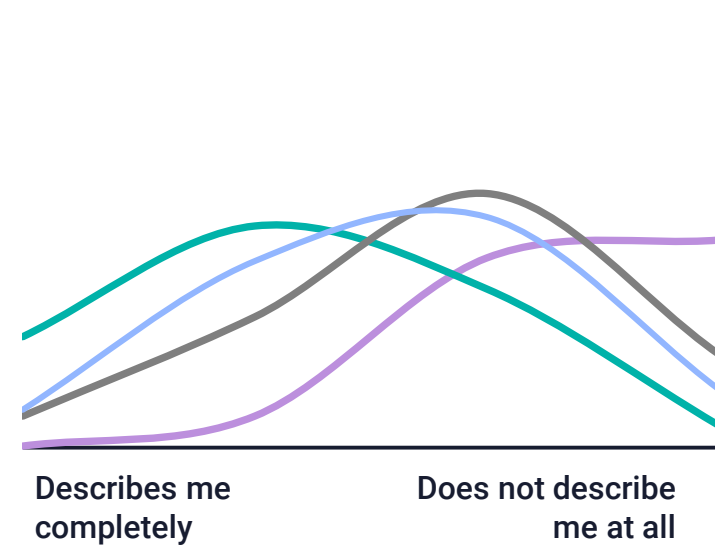
21% Avg. # times fish per year
Index **63** Index **46**

ANGLERS & BOATERS

8% Index **47**

LEISURE-TIME ENJOYERS

Leisure-Time Enjoyers tend to not consider themselves outdoor enthusiasts and their participation in outdoor fitness activities is minimal. Indoors, they skew to reading fiction. They also skew to keeping current and reading news online.



Wouldn't consider myself an "avid outdoorsman"

Mean 3.81 Index 108

I would consider myself an outdoor enthusiast
Mean 2.31 Index 71

I enjoy participating in outdoor activities with my family
Mean 3.76 Index 94

I participate in outdoor activities for adventure & excitement
Mean 3.13 Index 84

I enjoy the social and adventure aspects of outdoor activities
Mean 3.34 Index 88

TOP 5 SOCIAL MEDIA SITES USED



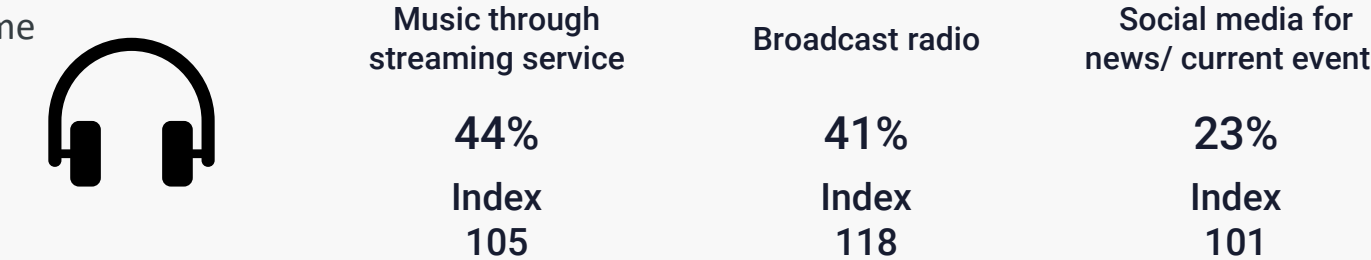
TELEVISION HABITS



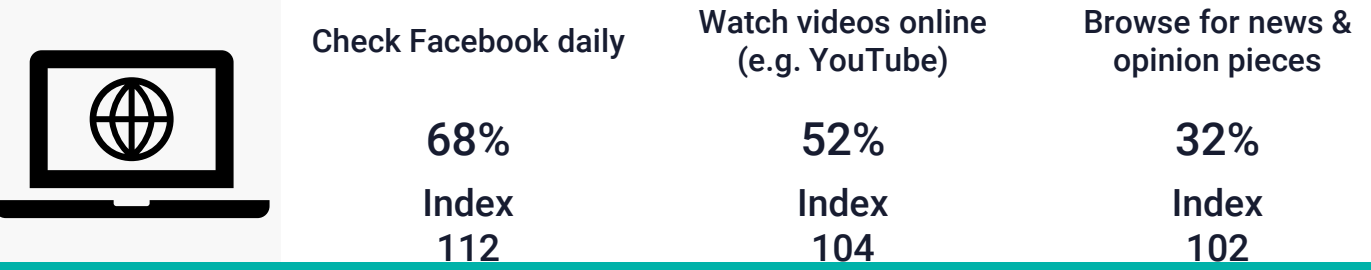
READING HABITS



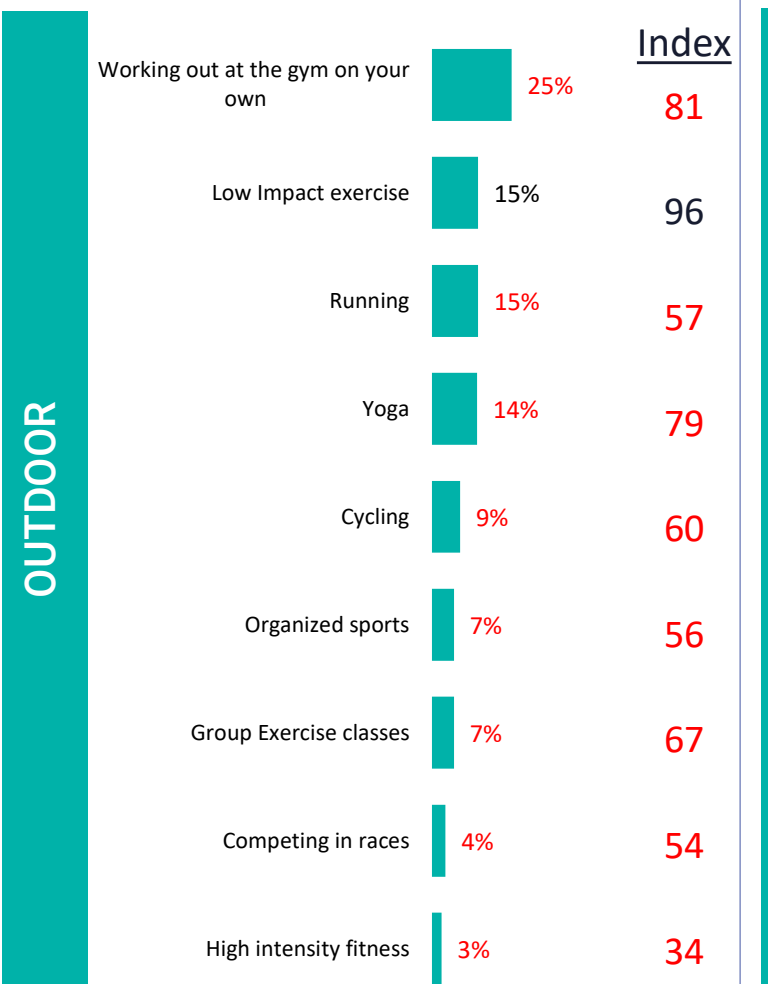
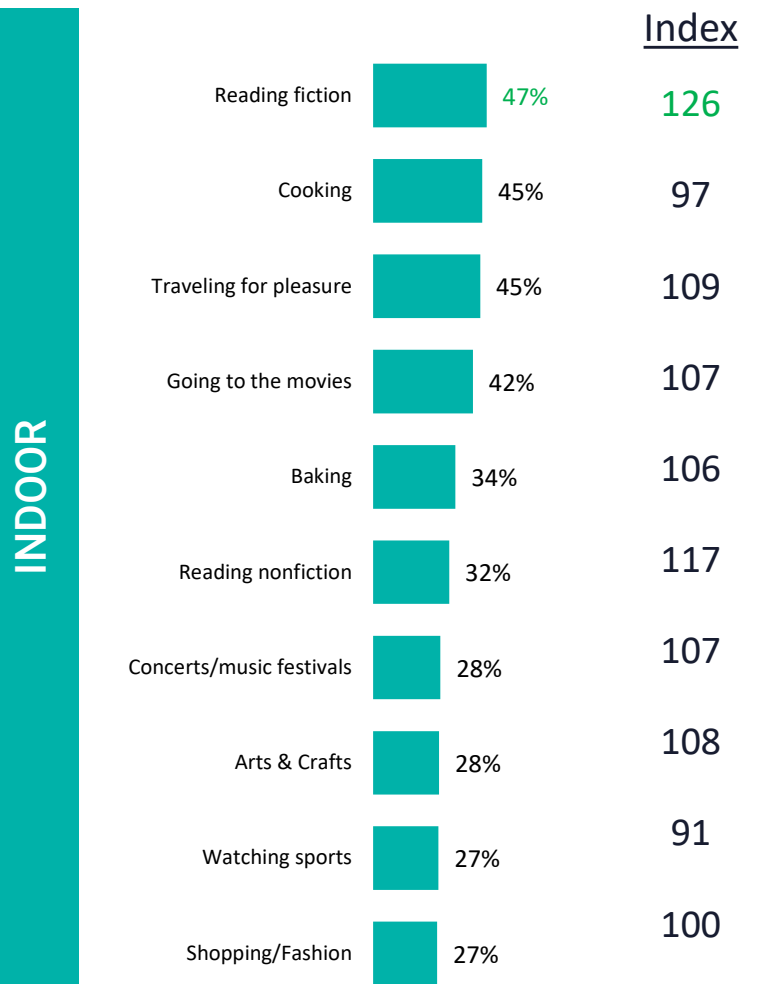
LISTENING HABITS



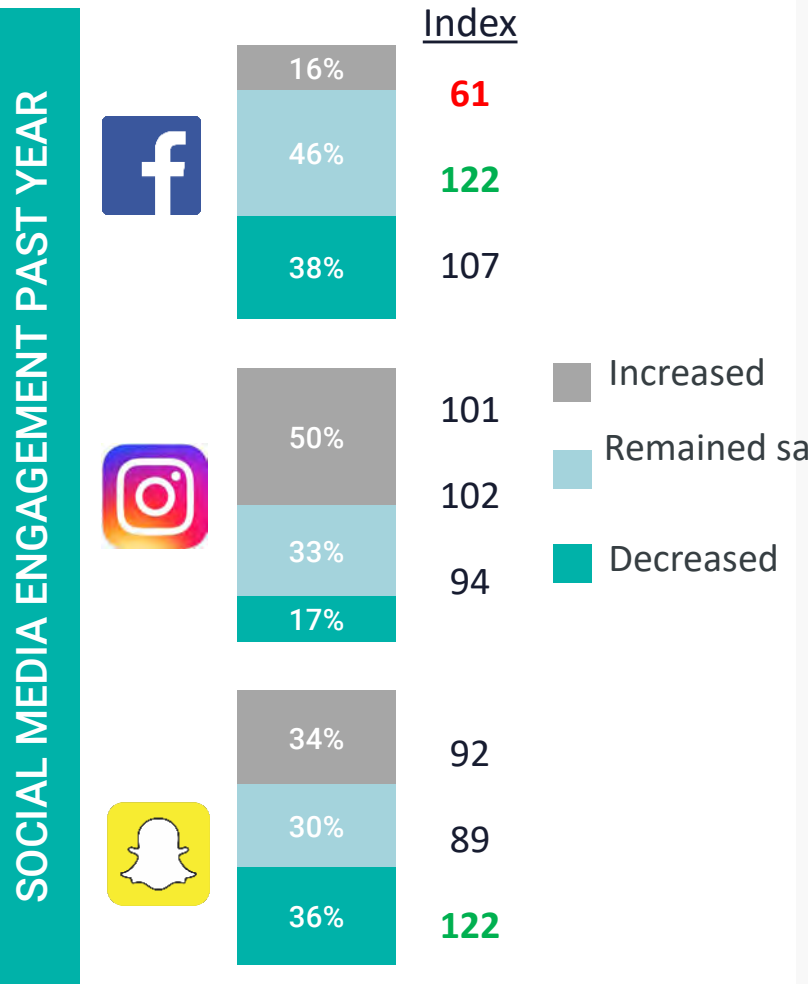
INTERNET BROWSING HABITS



HOBBIES



Only Top Responses Shown



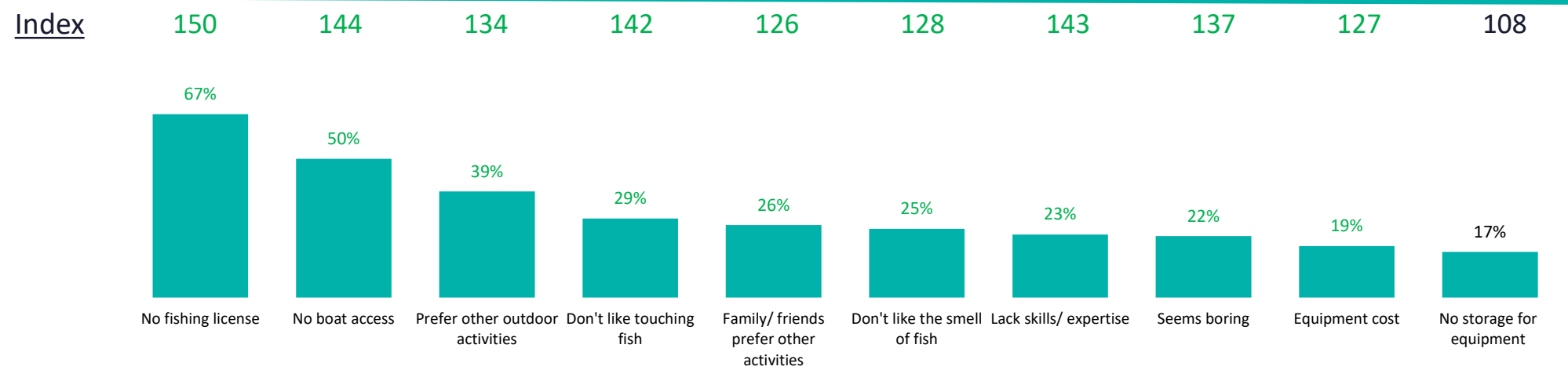
Green indicates over index versus total
Red indicates under index versus total

LEISURE-TIME ENJOYERS

Leisure-Time Enjoyers don't have strong interest in fishing, as evidenced by the fact that only about 1/4 say that they'd fish more if they had the time. They also tend to feel less prepared than average to fish, with barriers related to not having a fishing license nor access to a boat.

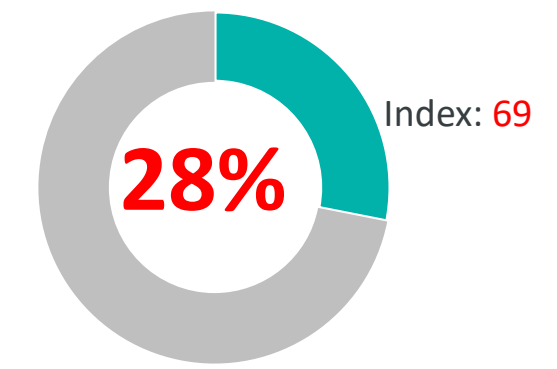


TOP FISHING BARRIERS (Completely Agree)

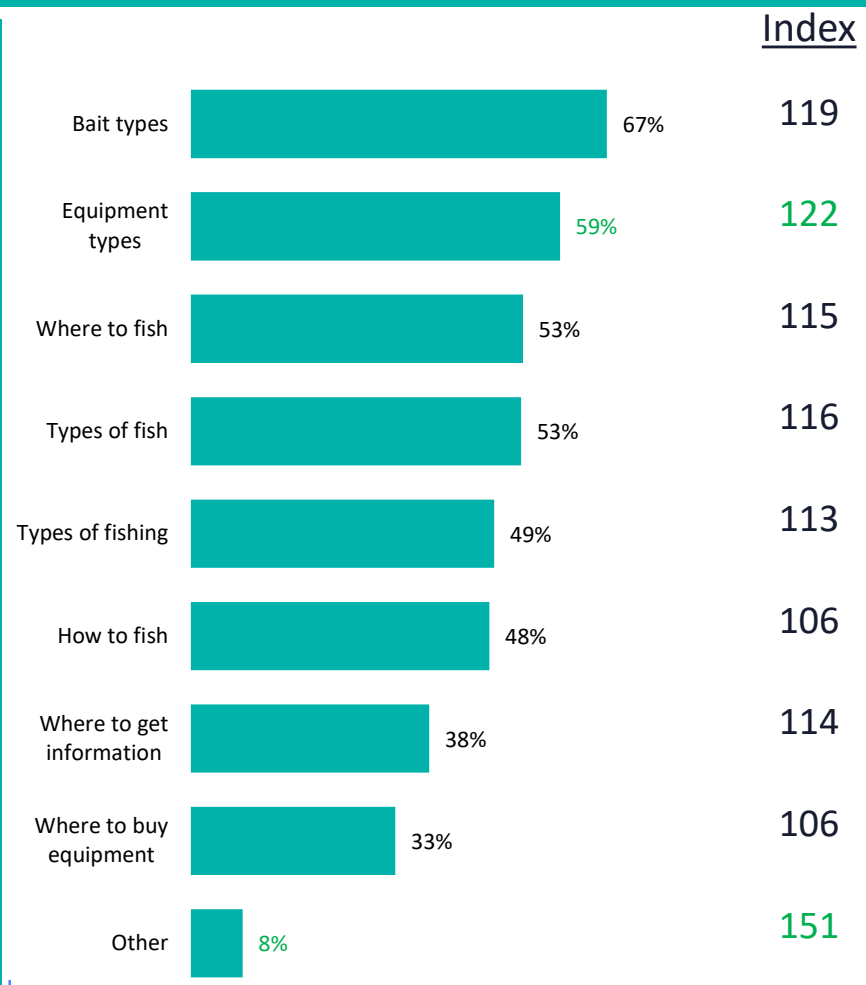


FREE TIME

Would fish more if they had more time



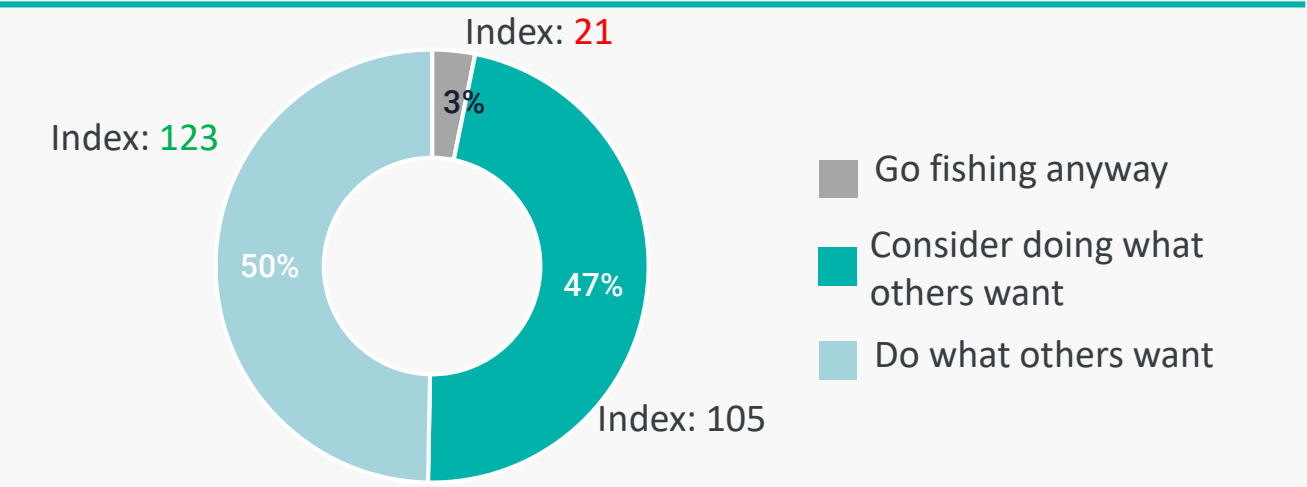
FISHING EDUCATION NEEDED



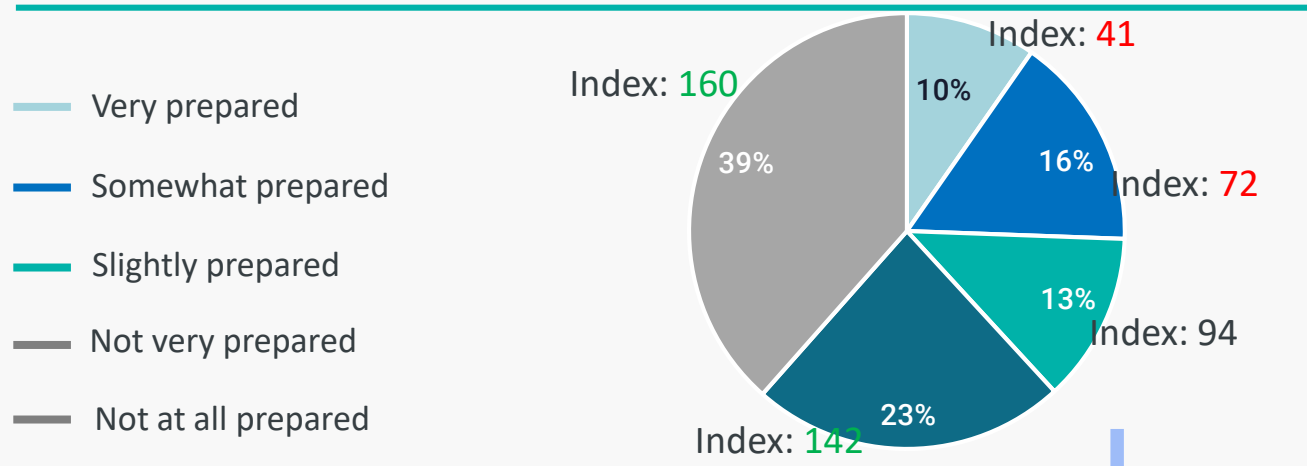
HOW SPEND TIME RATHER THAN FISH



PRIORITIZE FISHING



FISHING PREPAREDNESS



Green indicates over index versus total
Red indicates under index versus total

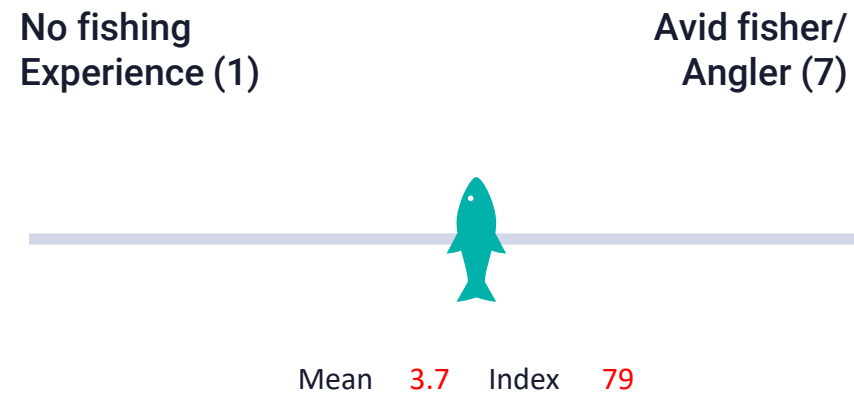
LEISURE-TIME ENJOYERS – Who Are anglers

Leisure-Time enjoyers spend lower than average \$ on fishing equipment and are less likely to go out and choose their equipment. They are fishing less frequently than in the past 2 years and are less likely to receive emotional benefits (e.g. relaxation, fun) from fishing.



FISHING

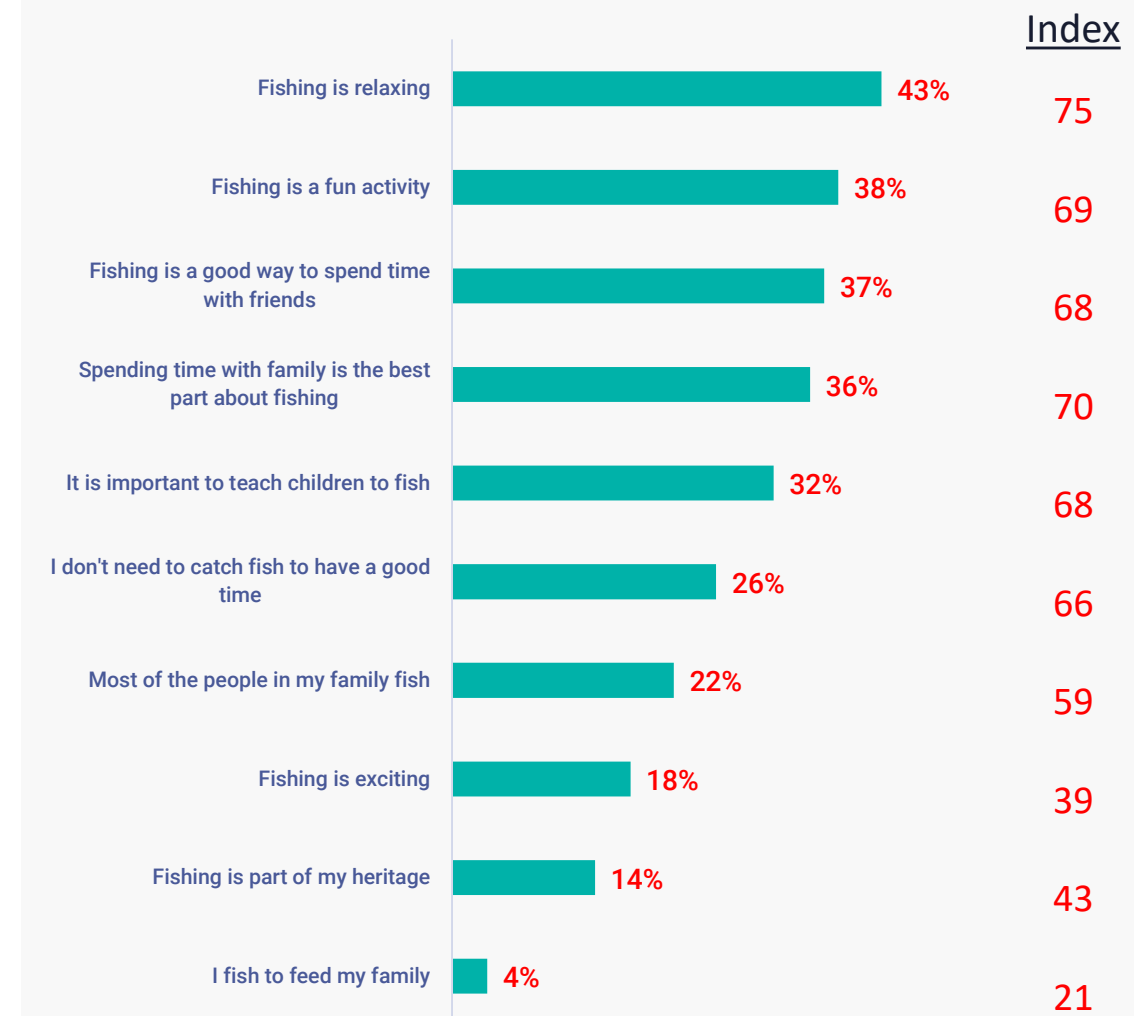
FISHING EXPERIENCE



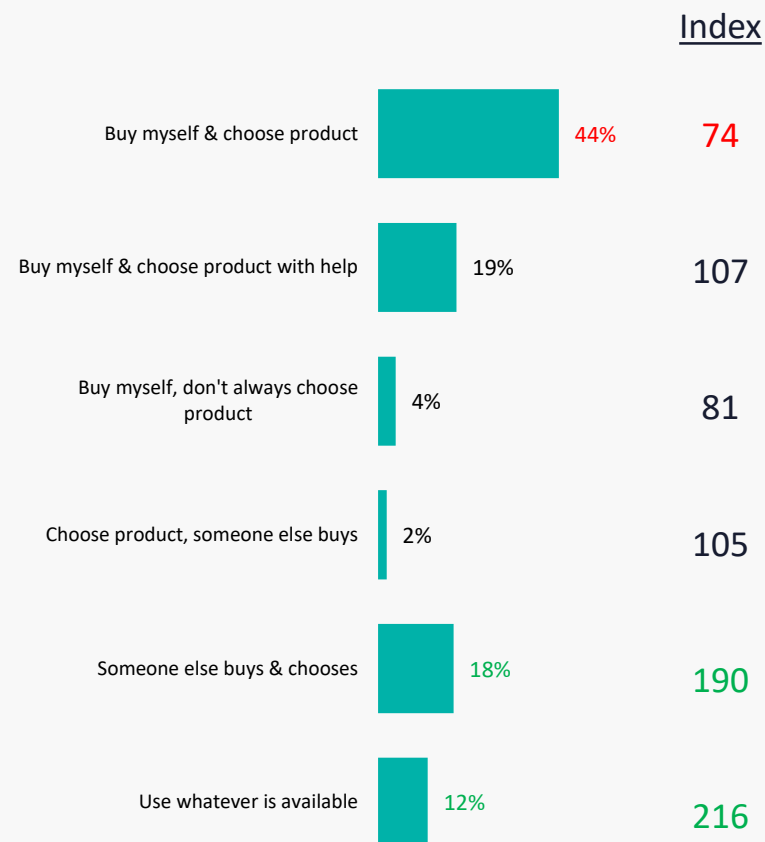
SPEND



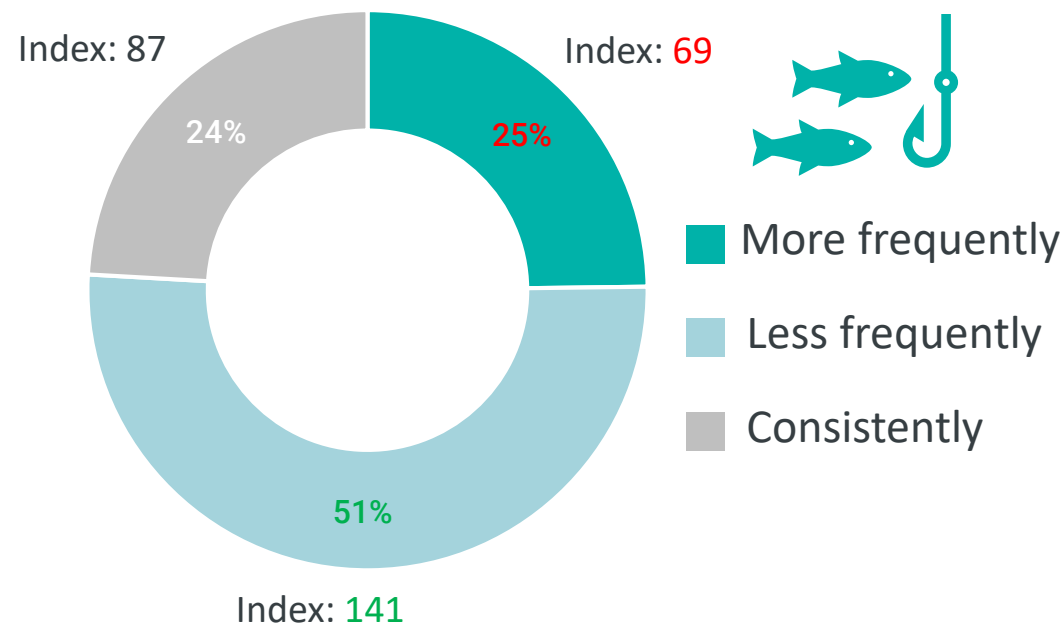
FISHING STATEMENT AGREEMENT *(Completely agree)*



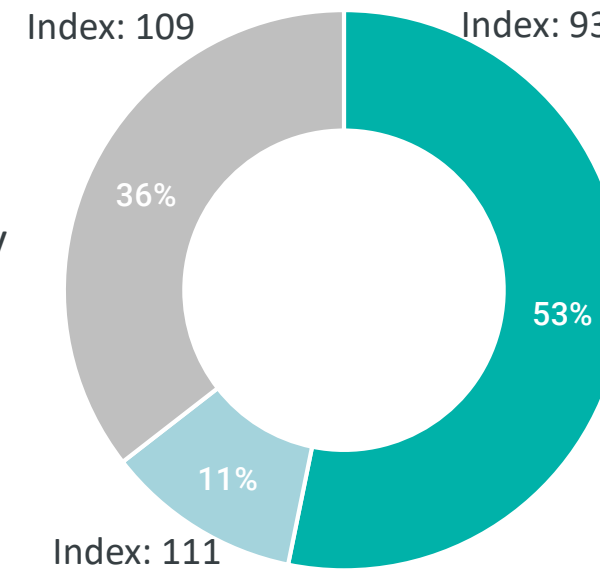
PRIMARY SHOPPER



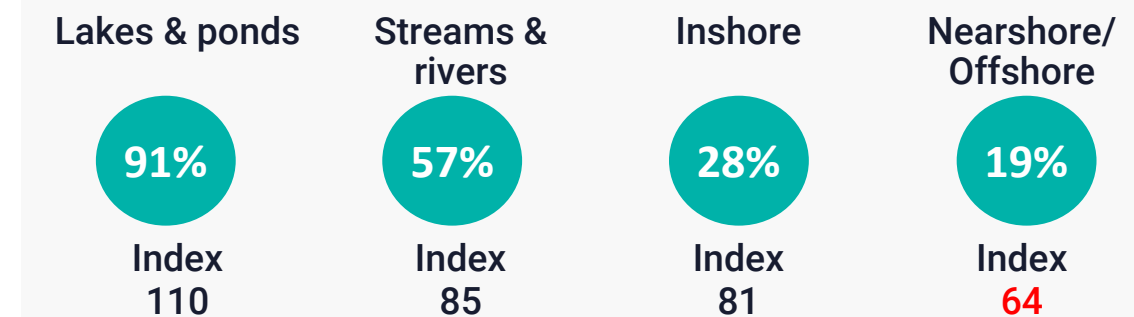
FISHING FREQUENCY P2Y



FUTURE FISHING FREQUENCY



TYPE OF WATER



Green indicates over index versus total
Red indicates under index versus total

LEISURE-TIME ENJOYERS – Who Are Anglers

When they do go fishing, Leisure-Time Enjoyers typically have shorter trips that are more seasonal in nature and are most often, fishing from land or a pier/dock. They are not commonly licensed fishermen.

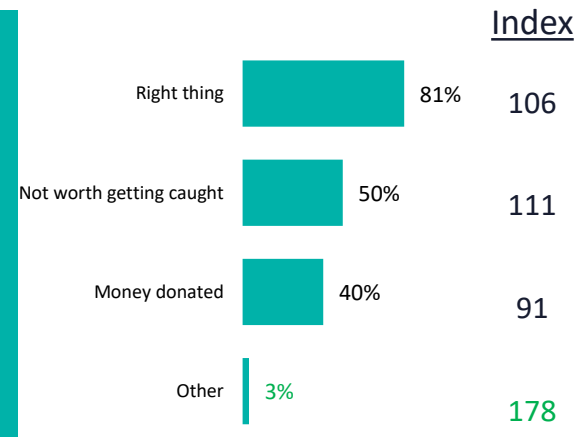


FISHING

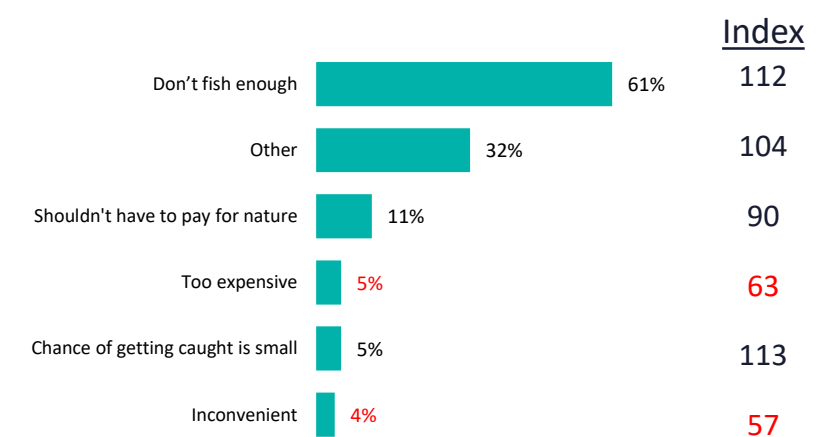
Have Fishing License

44%
Index **68**

REASON WHY HAVE



REASON WHY DON'T HAVE



TYPE OF FISHING TRIP

Distance	Percentage	Index
Less than 1 hour	67%	117
1-2 hours	29%	83
3+ hours	4%	46

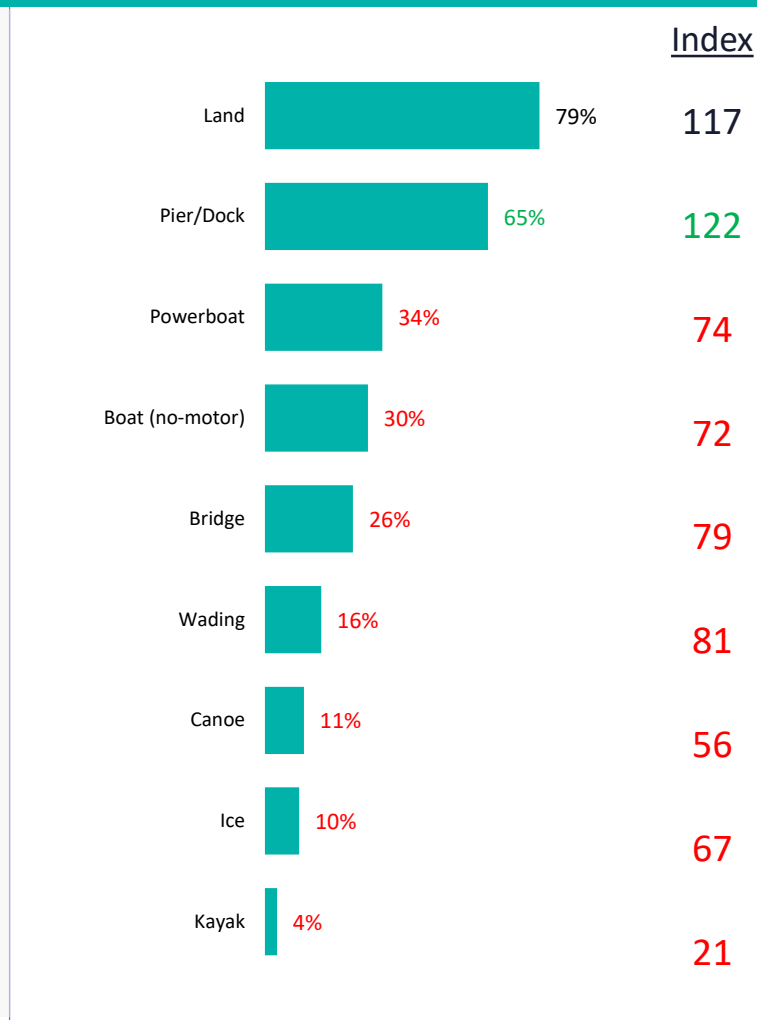
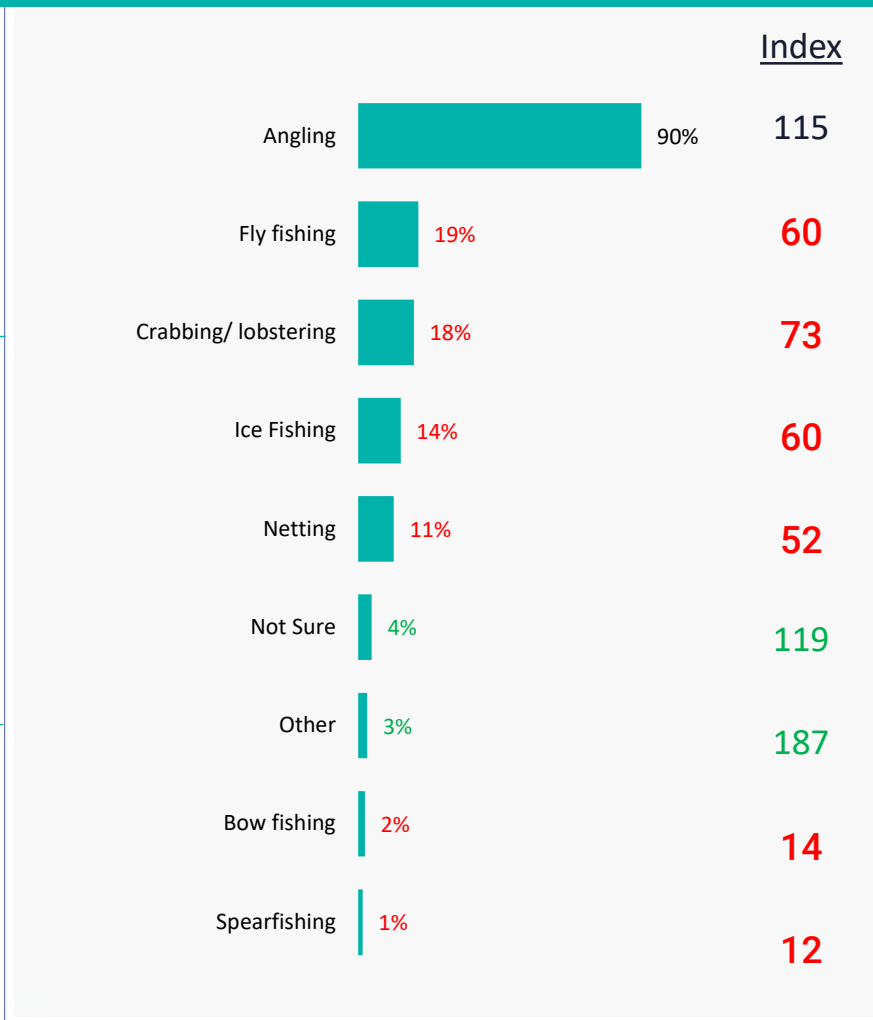
Length	Percentage	Index
Less than 1 day	55%	142
Day trip	37%	84
Weekend trip	8%	51
Longer than weekend	1%	30

TYPE OF FISHING

Type	Percentage	Index
For sport	0%	N/A
For leisure	100%	106

Frequency	Percentage	Index
Seasonally	55%	128
Year-round	27%	64
Special occasion	18%	119

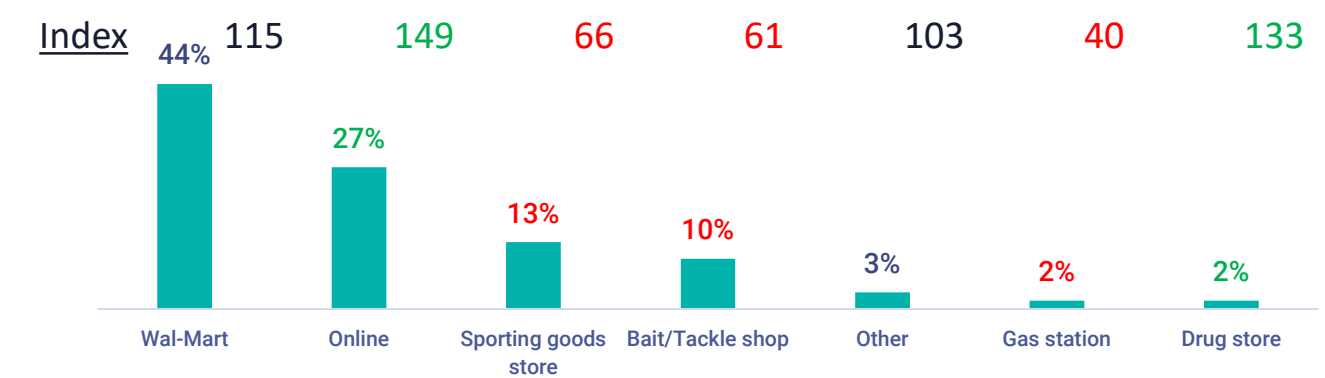
Method	Percentage	Index
Catch and release	64%	126
Keep to eat	36%	73



RETAILERS SHOPPED



LICENSE PURCHASE LOCATIONS



Green indicates over index versus total
Red indicates under index versus total

LEISURE-TIME ENJOYERS – Who Are boaters

Leisure-Time Enjoyers are below average boat owners and are boating less often than they were in the past two years. When they do go boating, it is typically a seasonal occurrence and more likely to be a short trip (< 1 hour).



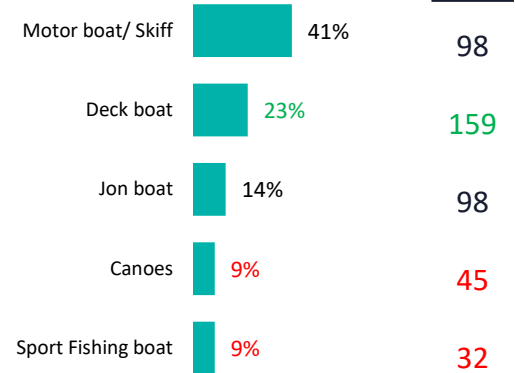
BOATING



Own a Boat

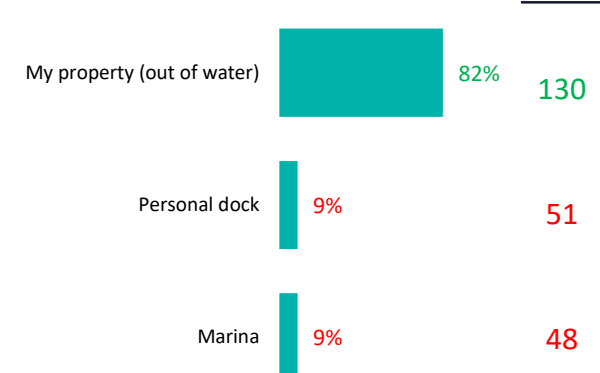
21%
Index
57

TOP 5 BOAT TYPE OWNED



Only Top Responses Shown

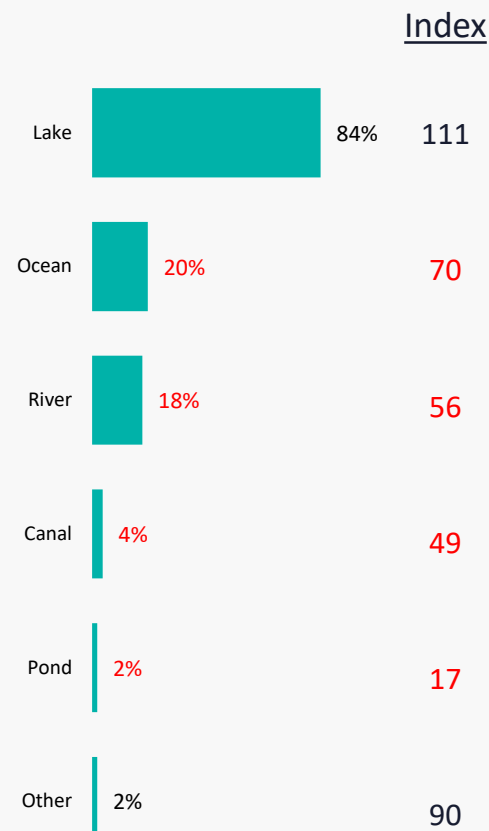
WHERE STORE BOAT



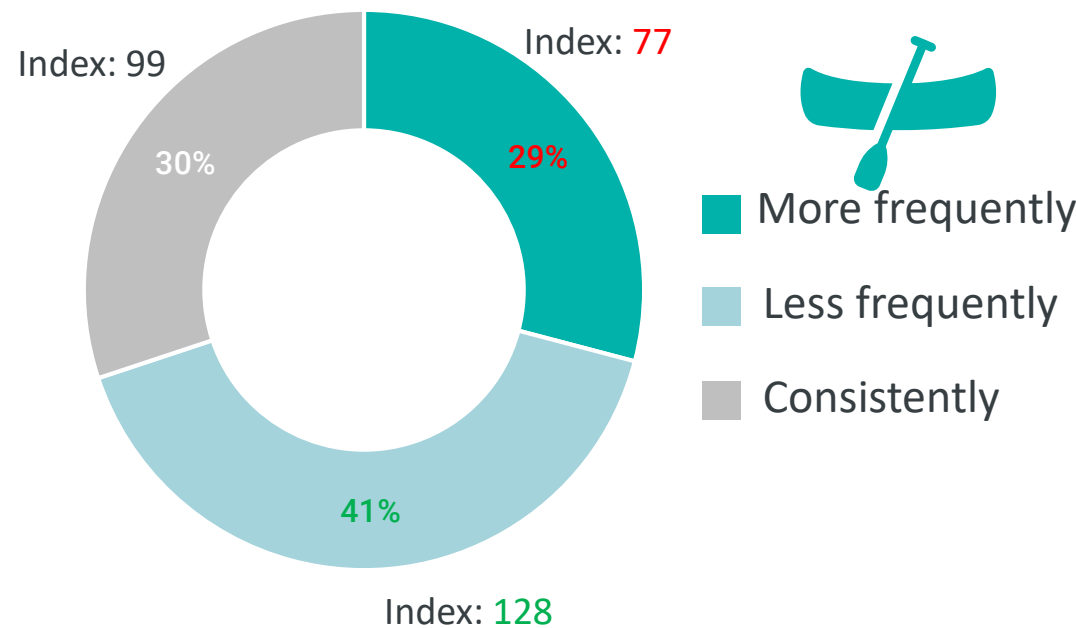
TYPE OF BOATING TRIP

Distance	Percentage	Index
Less than 1 hour	60%	119
1-2 hours	32%	88
3+ hours	8%	59
Length		
Part of trip, but not the purpose	51%	122
Day getaway	51%	118
Weekend getaway	35%	96
3+ day trip	18%	89
Activity		
Evening activity	13%	75
Morning activity	12%	70
Afternoon activity	9%	66
Activity		
Ride around	84%	112
Anchor and Swim/ Sunbathe	53%	104
Fish	49%	75
Water sports	40%	85
Transportation	17%	85
Other	1%	83

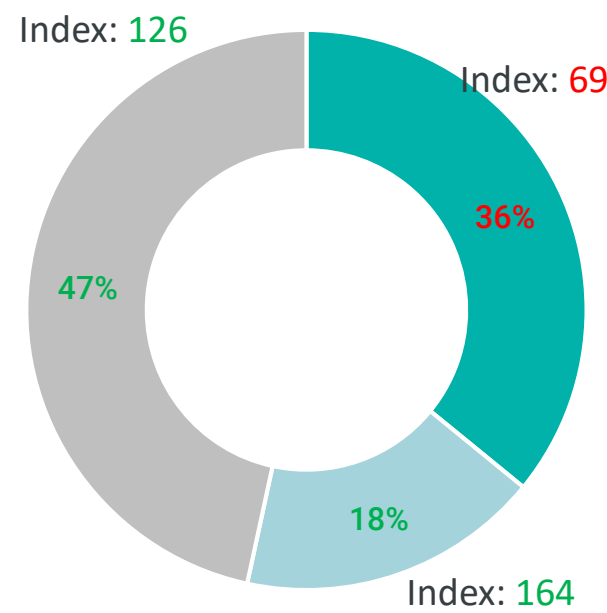
TYPE OF WATER BOAT



BOATING FREQUENCY P2Y



FUTURE BOATING FREQUENCY

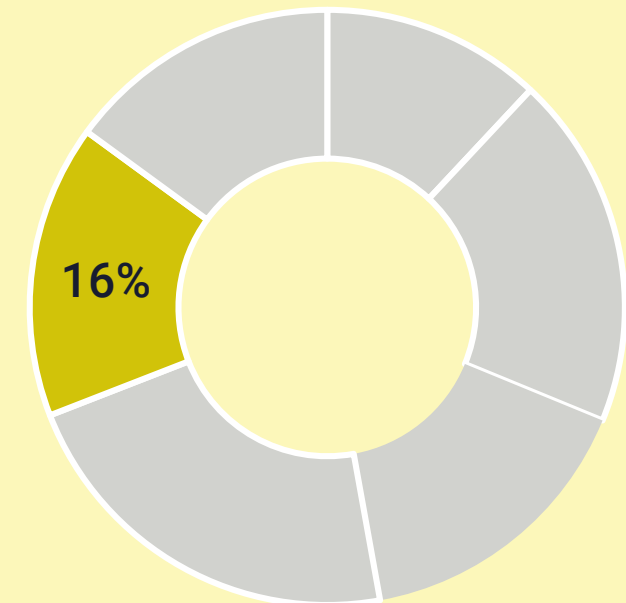


TIME OF YEAR



Green indicates over index versus total
Red indicates under index versus total

TARGET SEGMENT: LUKEWARM OCCASIONALISTS



KEY THEMES:

- 1 *Lukewarm Occasionalists have average or below average interest in many outdoor activities.*
- 2 *While they have average interest in fishing & boating, they aren't self-motivated – but rather, they tend to fish or boat more so when invited by a friend or family member.*
- 3 *While they don't exhibit strong barriers to fishing, they also aren't receiving positive benefits from it, which is consistent with their more occasional fishing/boating behavior.*



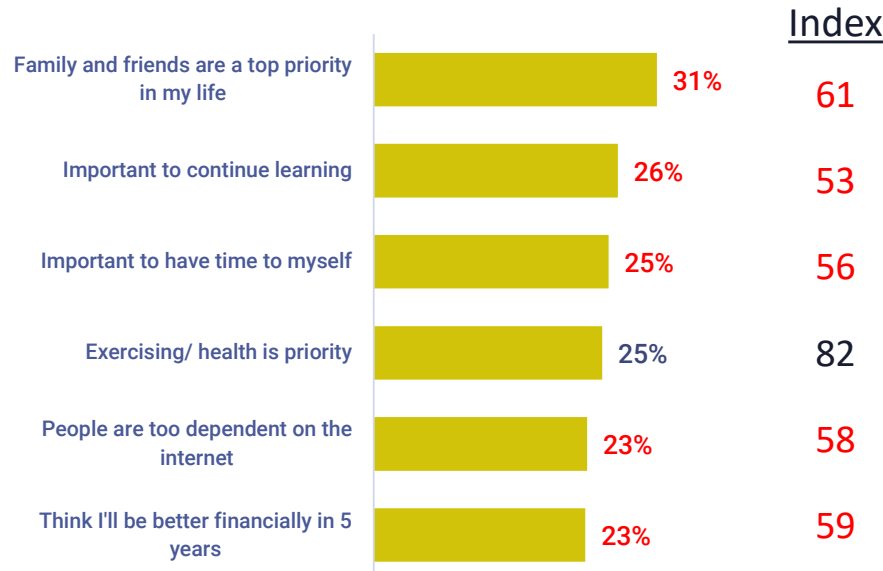
LUKEWARM OCCASIONALISTS

Lukewarm Occasionalists have average to below average interest in outdoor activities, including fishing & boating. This segment skews slightly to men and while the strong majority are Caucasian, the segment shows strong skews to Blacks and Asians.

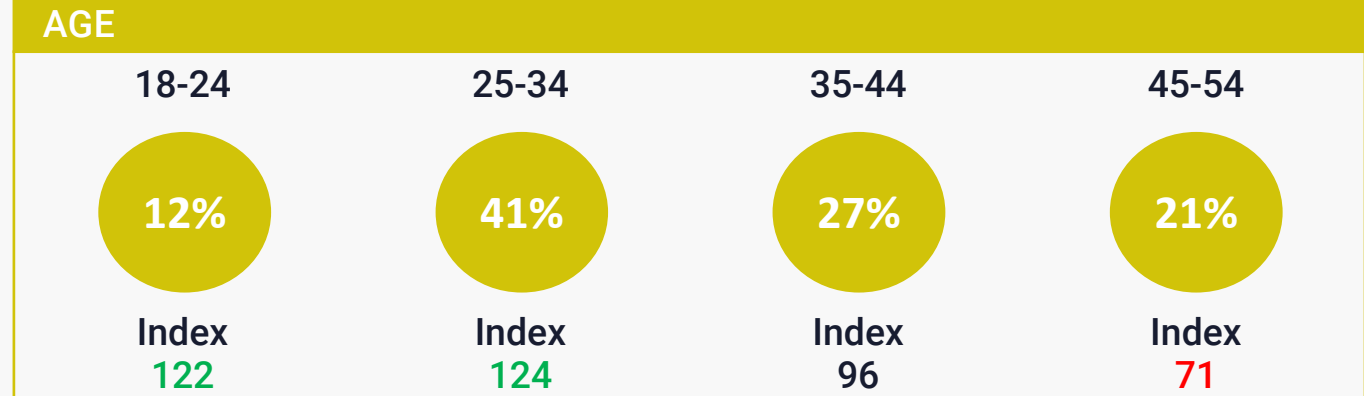


SEGMENT SIZE
(% OF PEOPLE)
16%

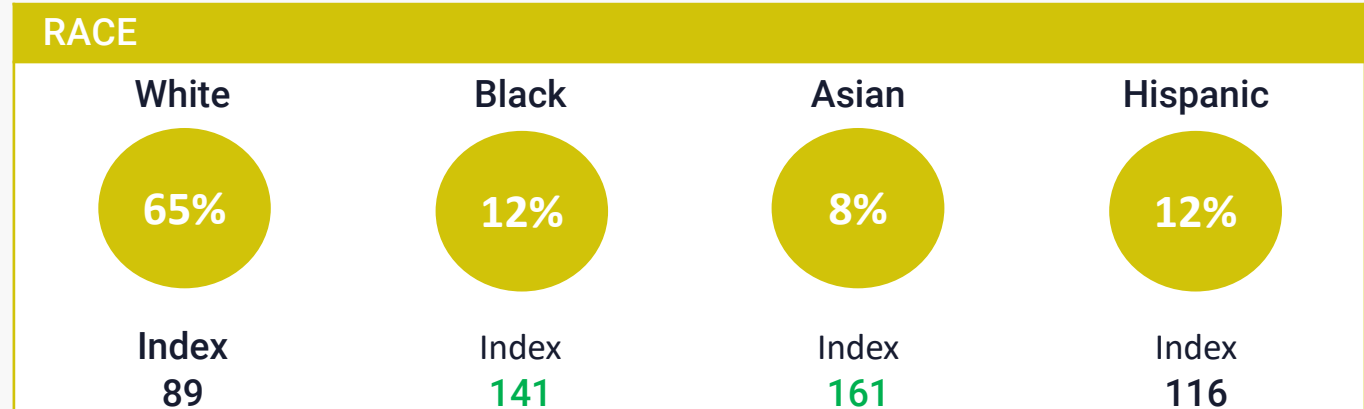
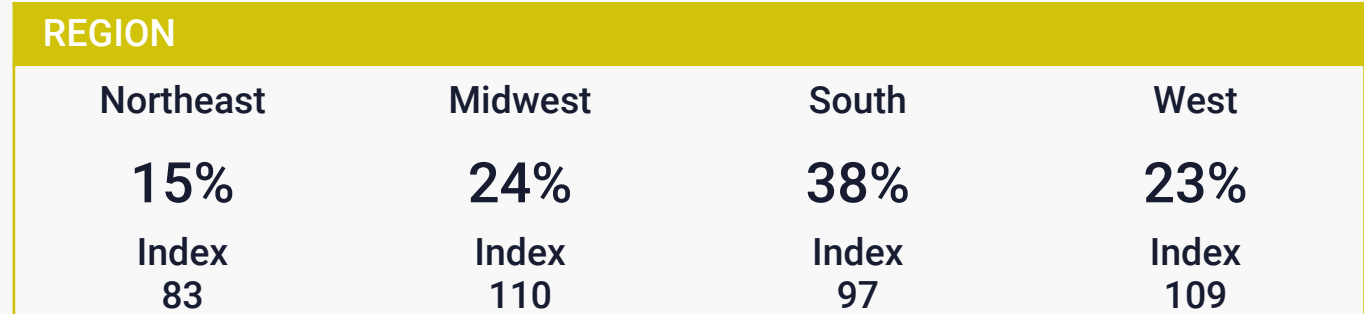
TOP ATTITUDES
(Completely Agree)



DEMOGRAPHICS



	Index
GENDER	56% Male/ 45% Female / 131/ 77
INCOME (mean)	\$75,100 / 101
MARITAL STATUS	52% Married / 98
HH SIZE (mean)	3.0 / 98
CHILDREN IN HH	53% / 110



Green indicates over index versus total
Red indicates under index versus total

OUTDOOR ACTIVITY

Only Top Responses Shown

OUTDOOR ACTIVITY ENJOYMENT

Enjoy extremely

Activity	Percentage	Index
Beach	37%	71
Jet skiing	33%	93
Snowmobiling	32%	111
Four-wheeling	32%	86
Hunting	31%	92
Tailgating	29%	77
Motorcycling	29%	84
Lake/ river	25%	60
Picnicking	24%	78
Target shooting	24%	74
Boating	24%	69
Water skiing/ sports	22%	82

OUTDOOR ACTIVITY INTEREST

Very interested

Activity	Percentage	Index
Beach	43%	70
Lake/ river	29%	57
Fishing	27%	83
Visit parks	27%	55
Picnicking	26%	65
Gardening	24%	72
Boating	23%	68
Tailgating	20%	67
Camping	20%	55
Biking	19%	74
Jet skiing	18%	69
Four-wheeling	18%	72

BOATERS 3.62

21% Avg. # times boat per year
Index 86 / Index 102

ANGLERS 4.61

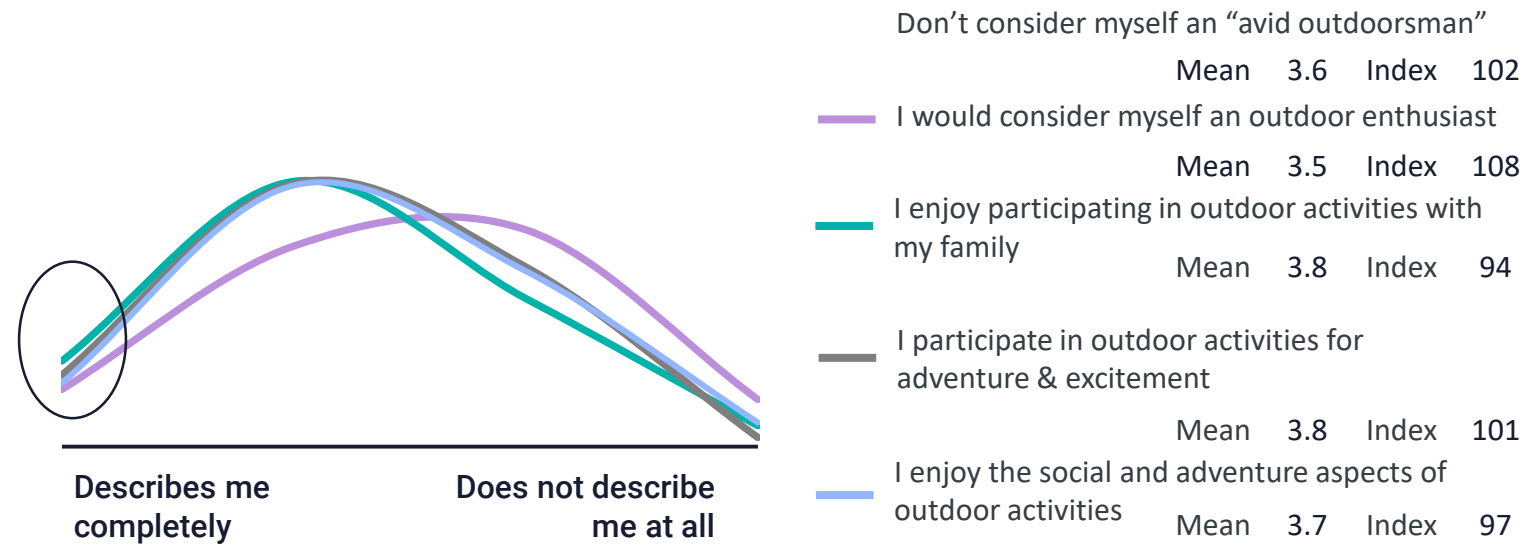
32% Avg. # times fish per year
Index 96 / Index 98

ANGLERS & BOATERS

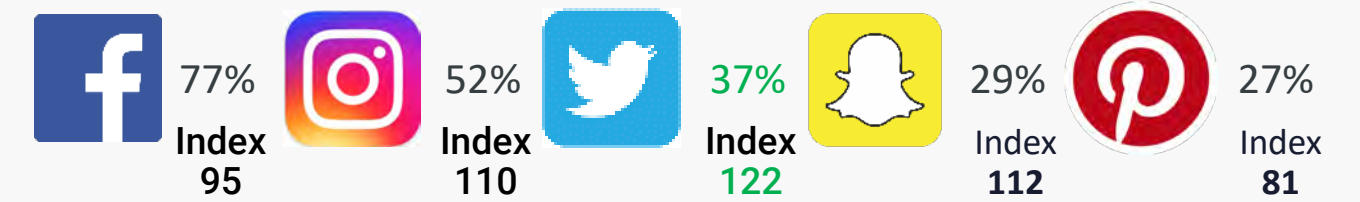
13% Index 76

LUKEWARM OCCASIONALISTS

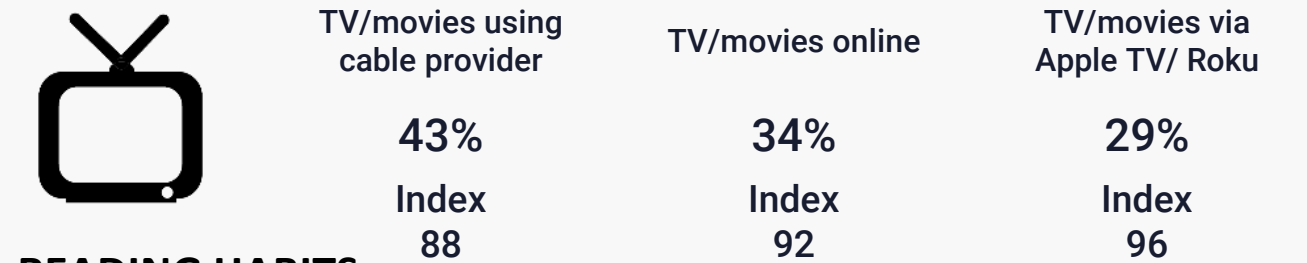
Lukewarm Occasionalists have fairly average interest in fitness activities, though show some skews to less common ones, including organized sports and group exercise classes. Their interest in and use of social media, television and other media are moderate.



TOP 5 SOCIAL MEDIA SITES USED



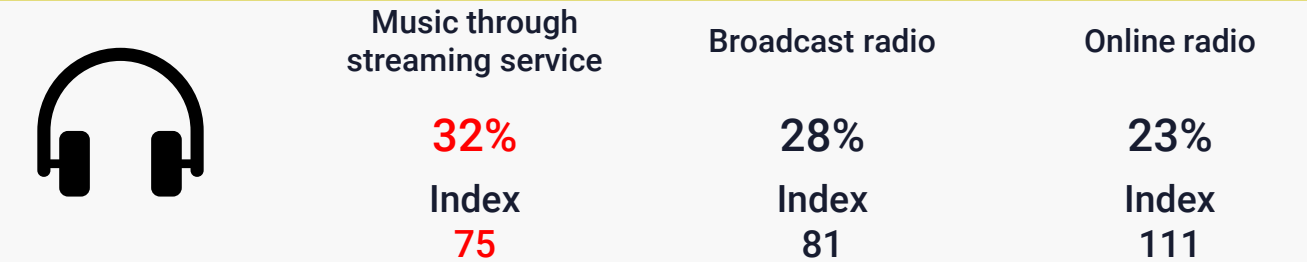
TELEVISION HABITS



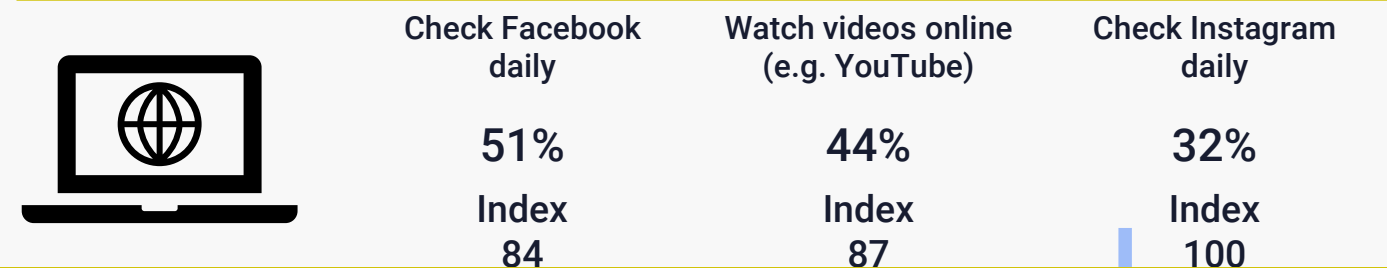
READING HABITS



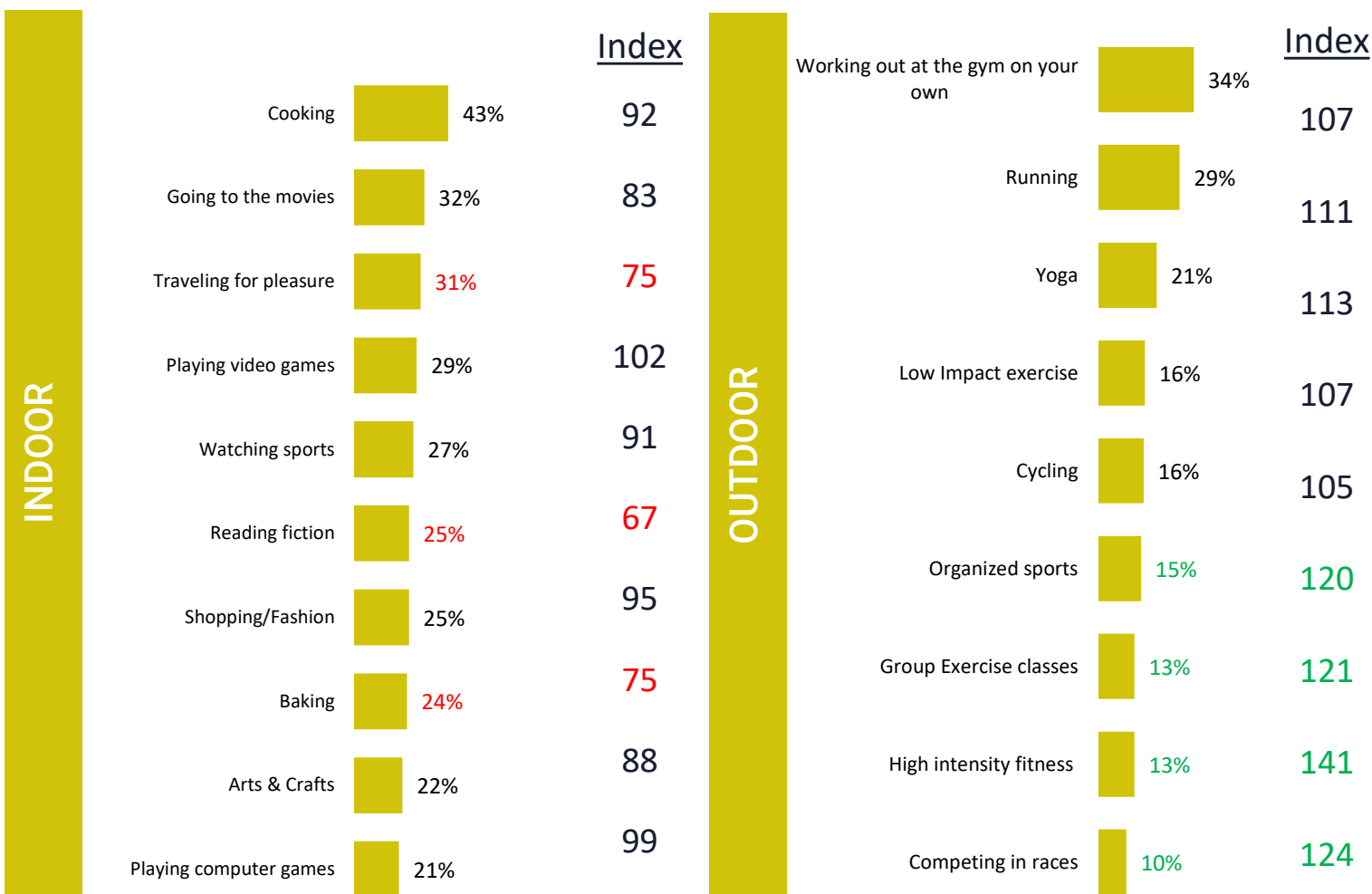
LISTENING HABITS



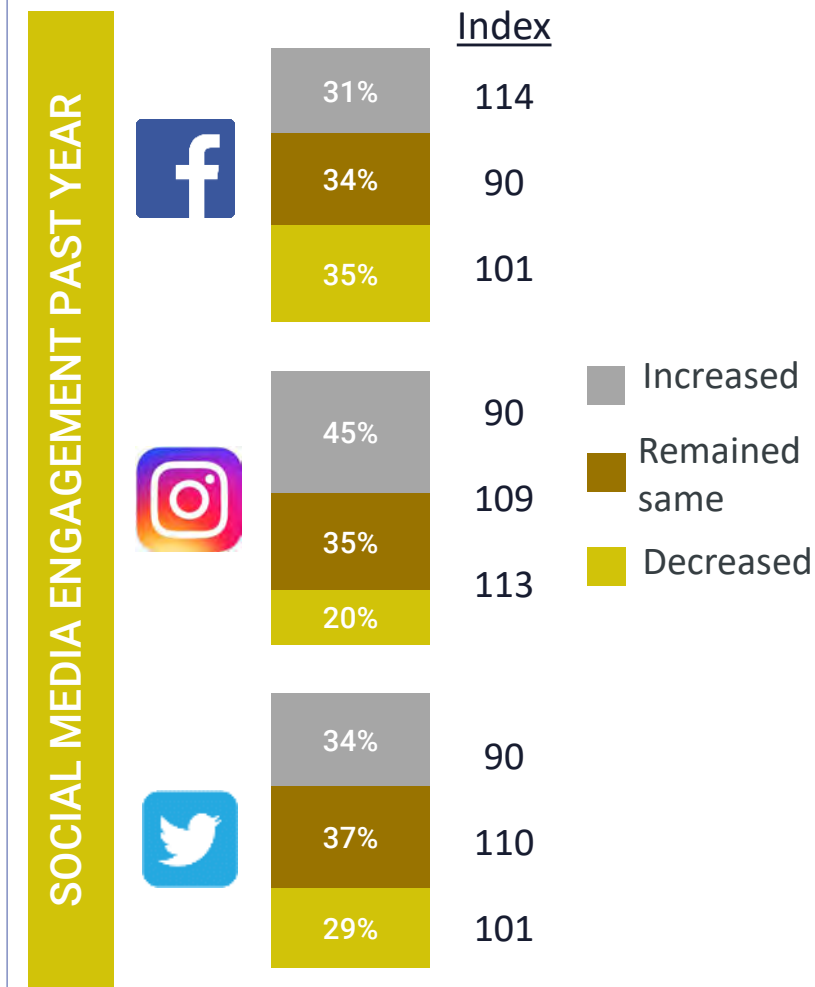
INTERNET BROWSING HABITS



HOBBIES



Only Top Responses Shown



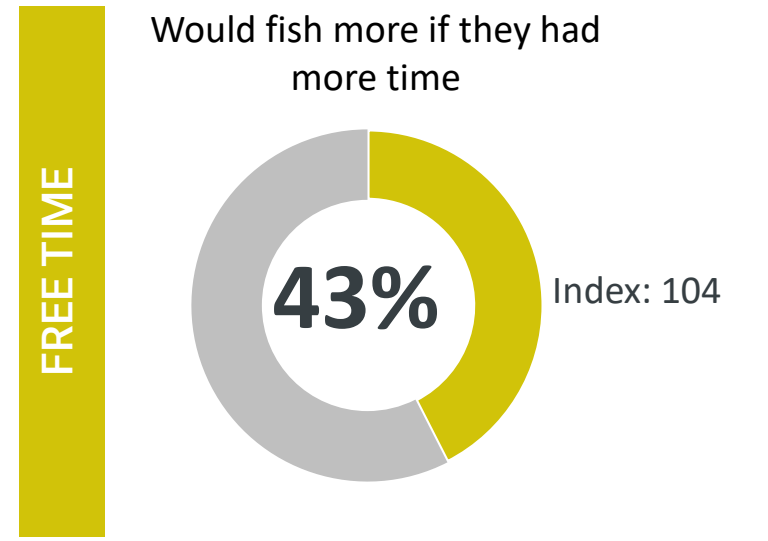
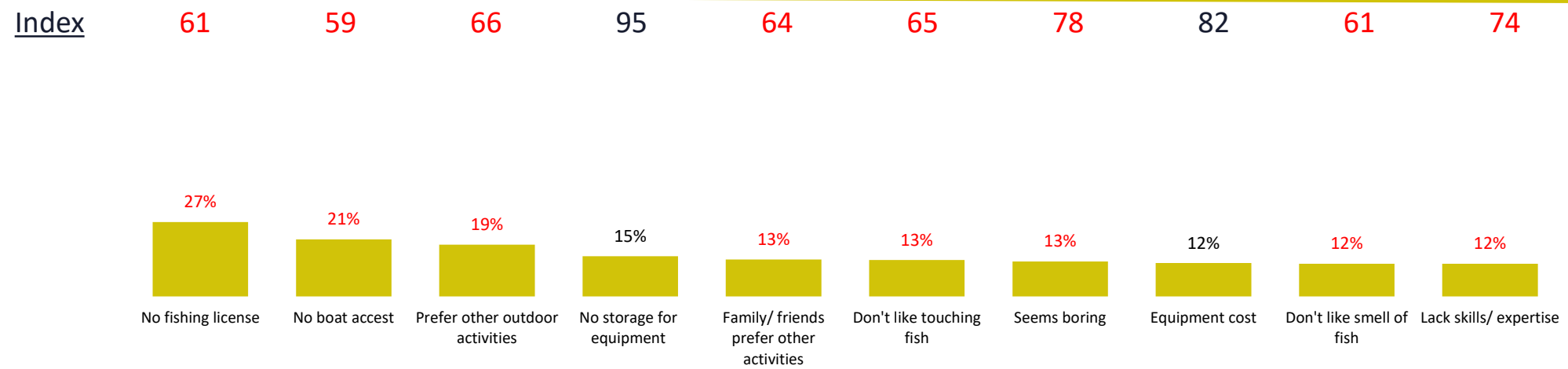
Green indicates over index versus total
Red indicates under index versus total

LUKEWARM OCCASIONALISTS

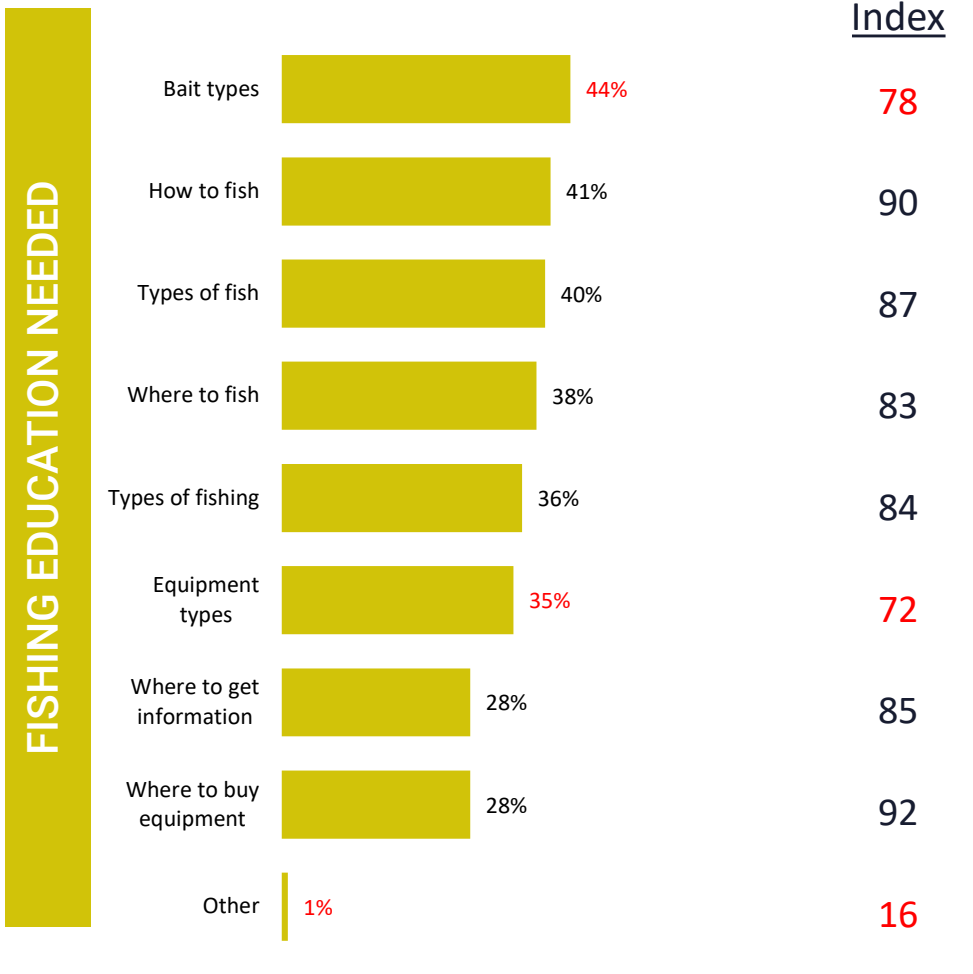
Lukewarm Occasionalists feel moderately prepared to fish but only about 4 in 10 agree that they'd fish more often if they had the time – demonstrating their somewhat tepid interest in the sport. Their lower than average barriers to fishing don't seem to be preventing them from fishing.



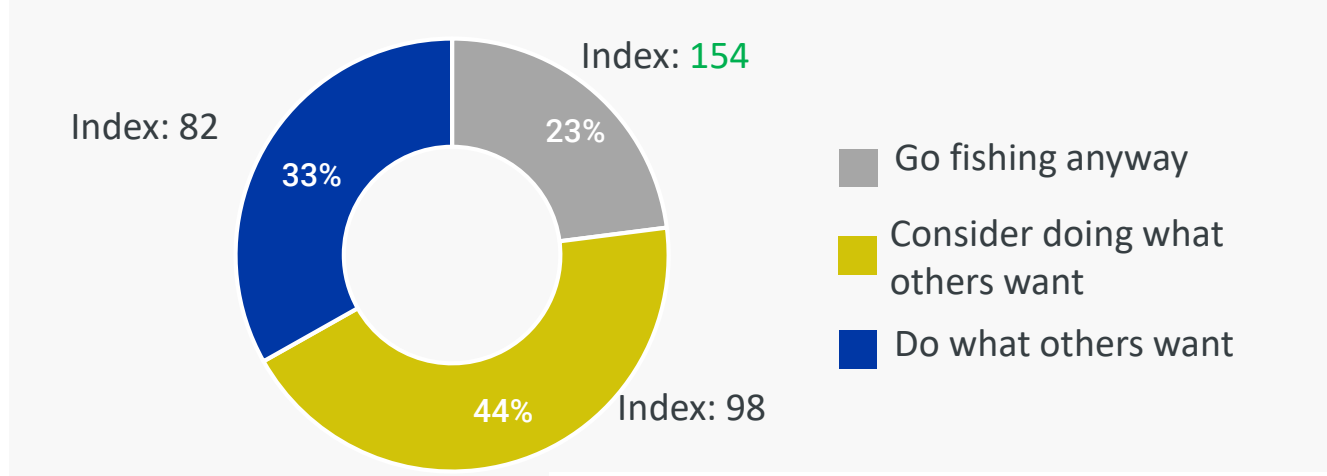
TOP FISHING BARRIERS (Completely Agree)



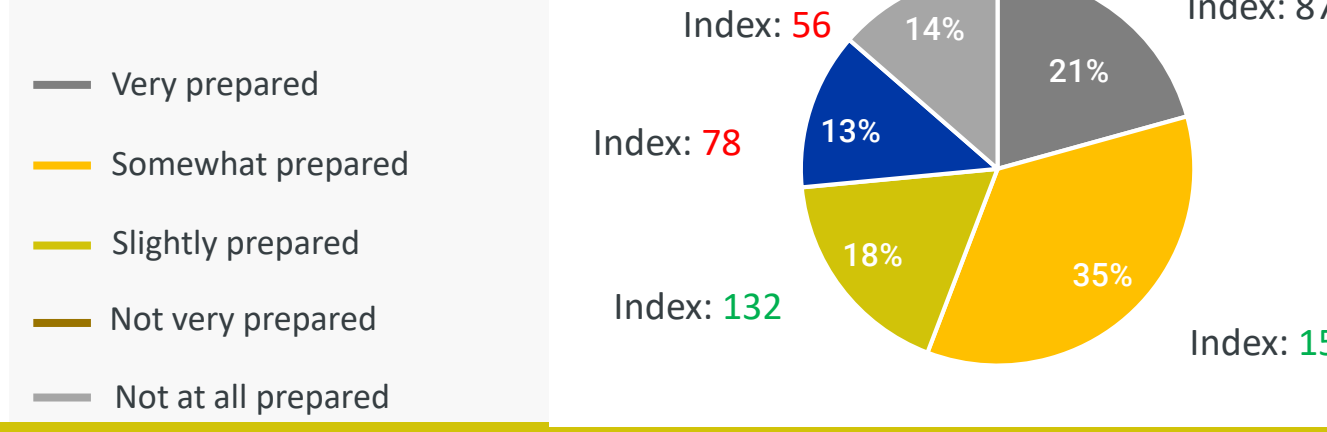
FISHING EDUCATION NEEDED



PRIORITIZE FISHING



FISHING PREPAREDNESS



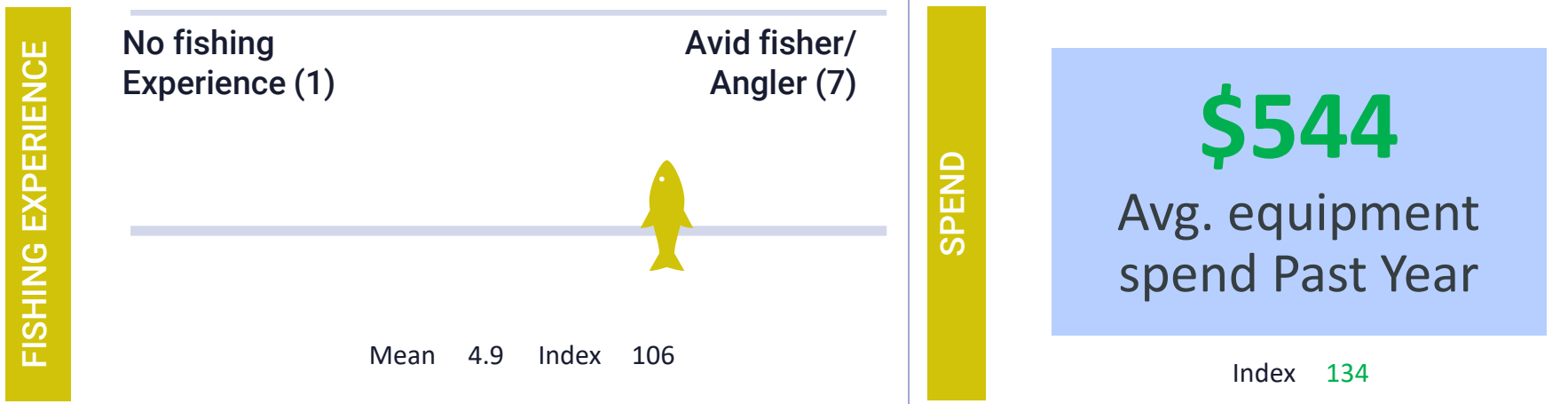
Green indicates over index versus total
Red indicates under index versus total

LUKEWARM OCCASIONALISTS – Who Are Anglers

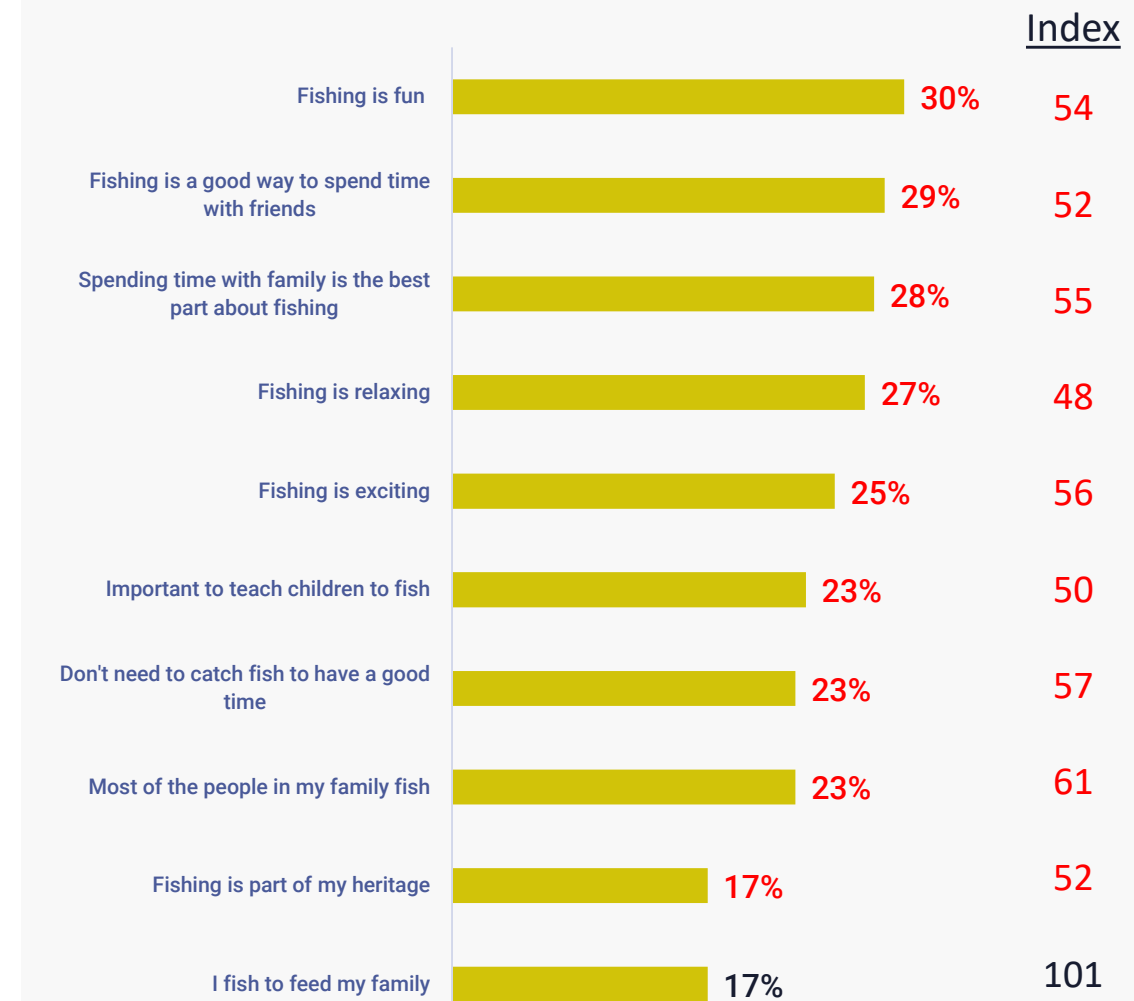
While Lukewarm Occasionalists have solid experience when it comes to fishing and have spent an above average amount on gear, they don't get particularly strong emotional benefits from fishing.



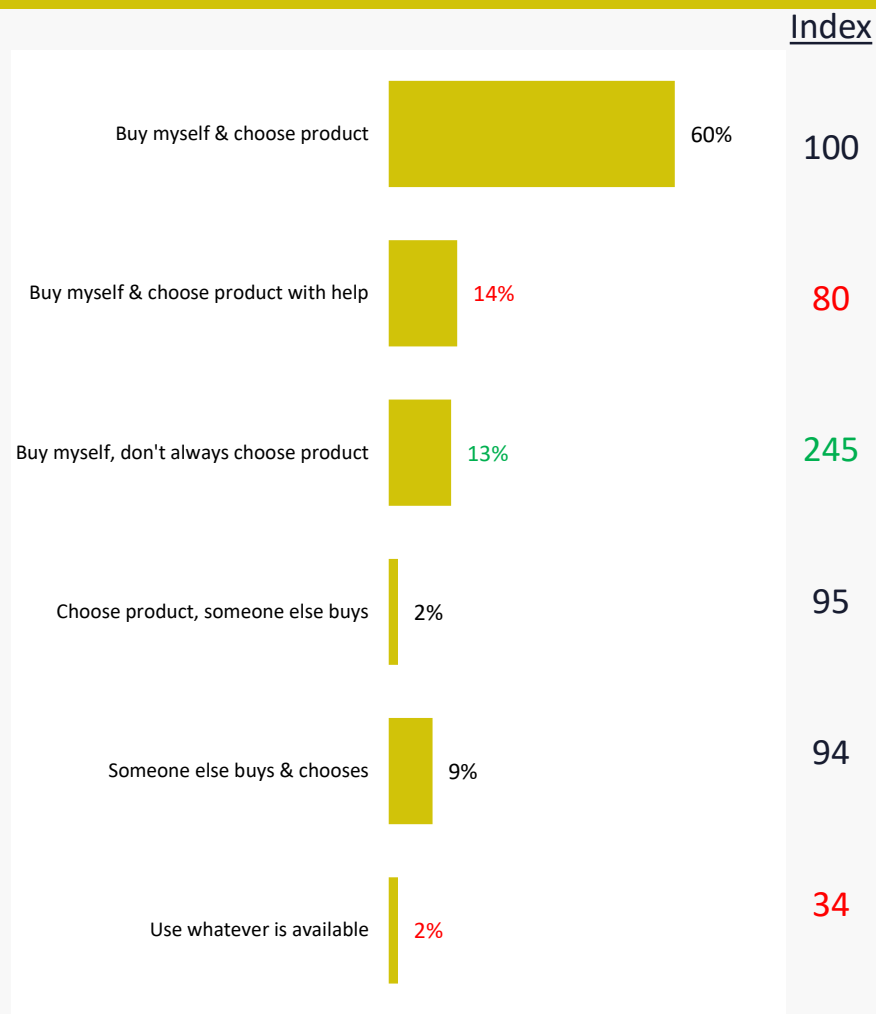
FISHING



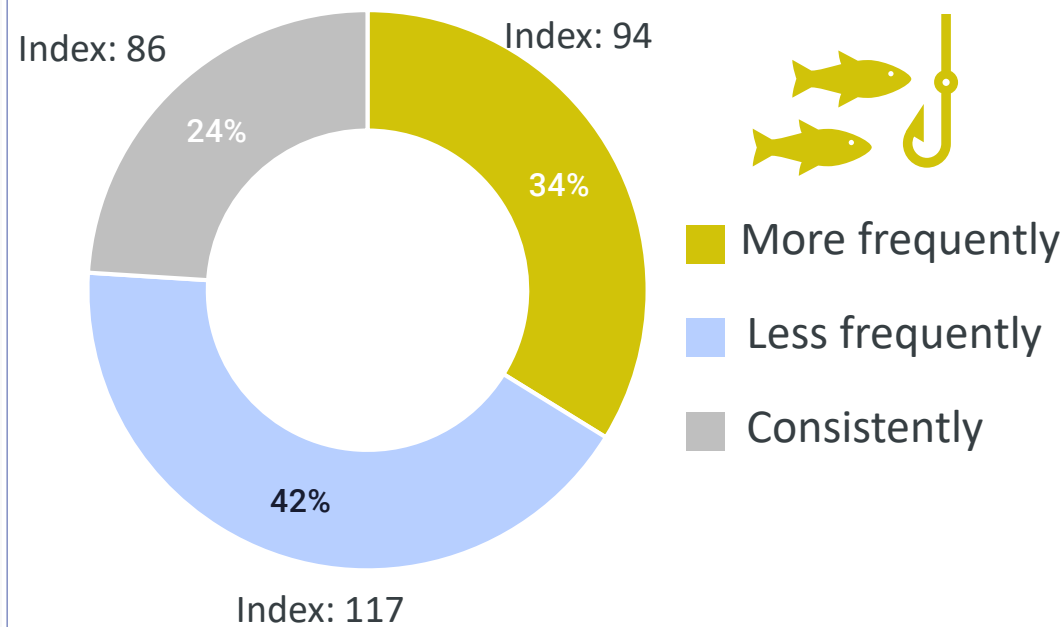
FISHING STATEMENT AGREEMENT *(Completely agree)*



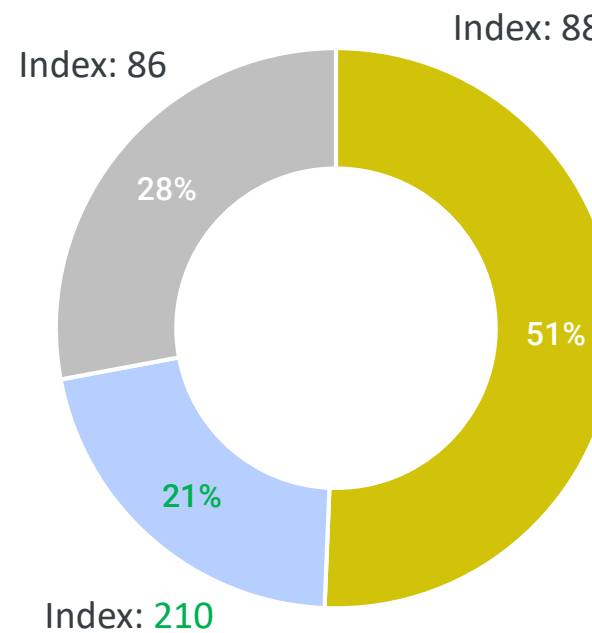
PRIMARY SHOPPER



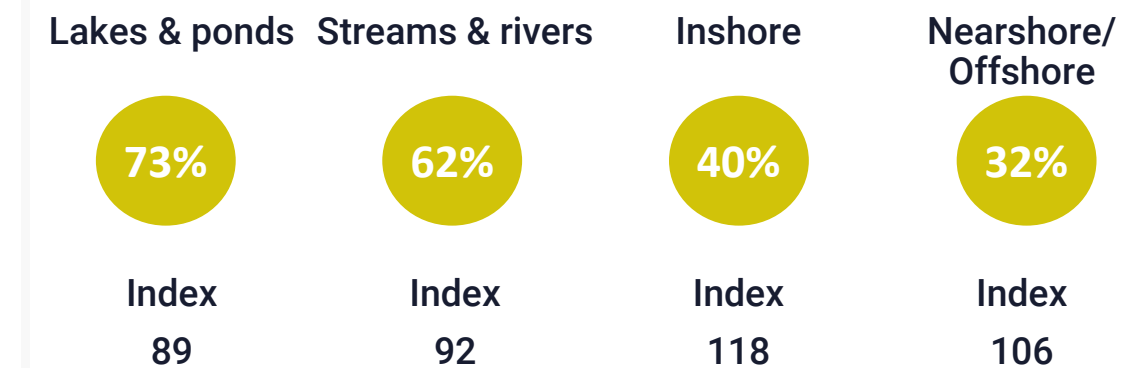
FISHING FREQUENCY P2Y



FUTURE FISHING FREQUENCY



TYPE OF WATER



Green indicates over index versus total
Red indicates under index versus total

LUKEWARM OCCASIONALISTS – Who Are anglers

An average number of Lukewarm Occasionalists who are anglers have a fishing license and when they do fish, it's most typically a day or weekend trip, with a distance of 2 hours or less.



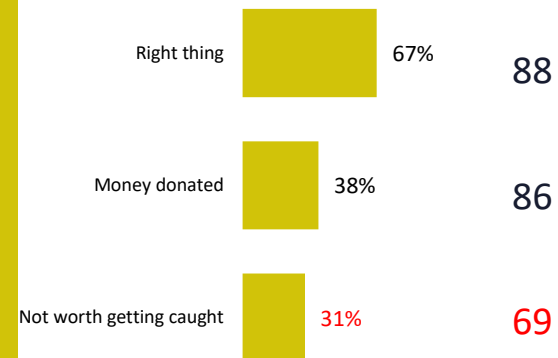
FISHING



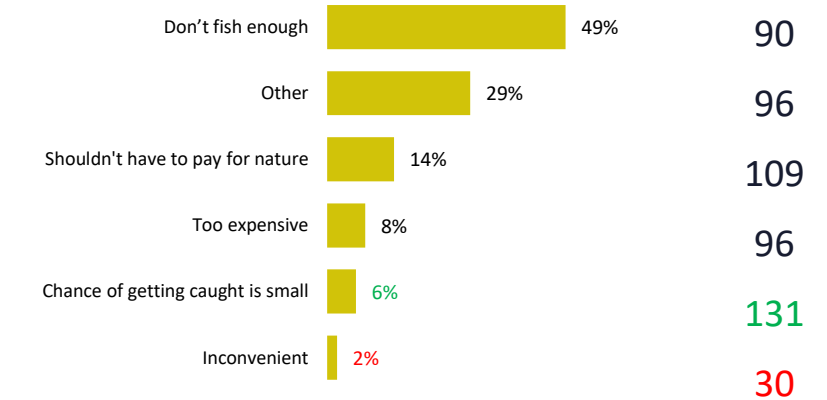
Have Fishing License

67%
Index 104

REASON WHY HAVE



REASON WHY DON'T HAVE



TYPE OF FISHING TRIP

Distance	Percentage	Index
Less than 1 hour	47%	81
1-2 hours	46%	130
3+ hours	8%	103

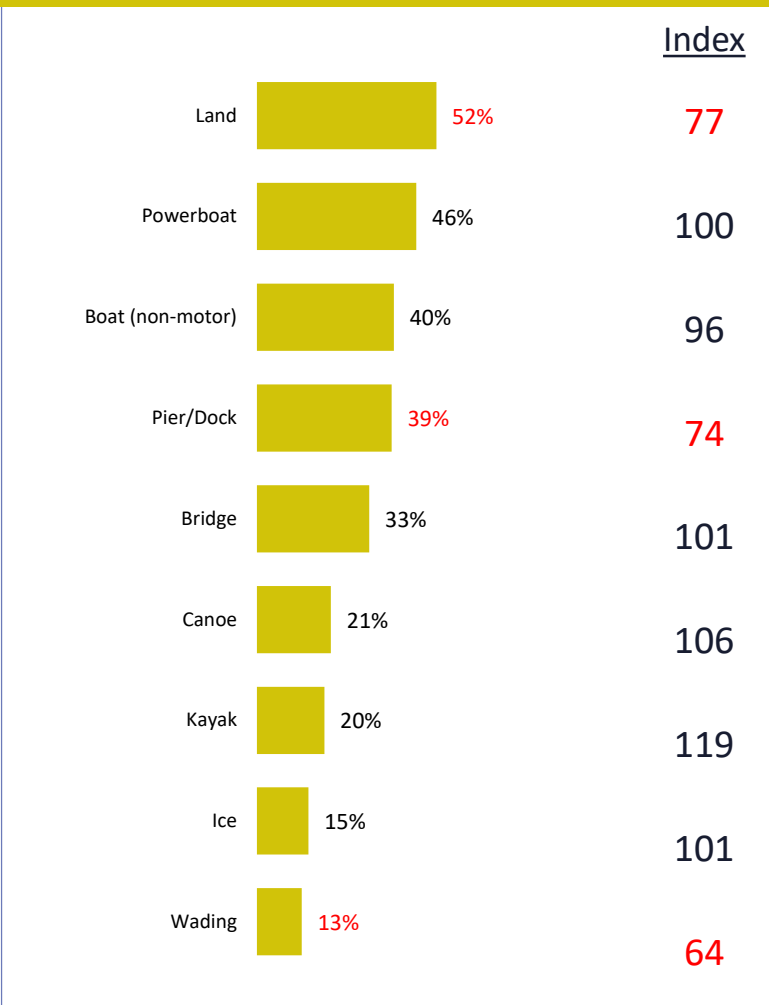
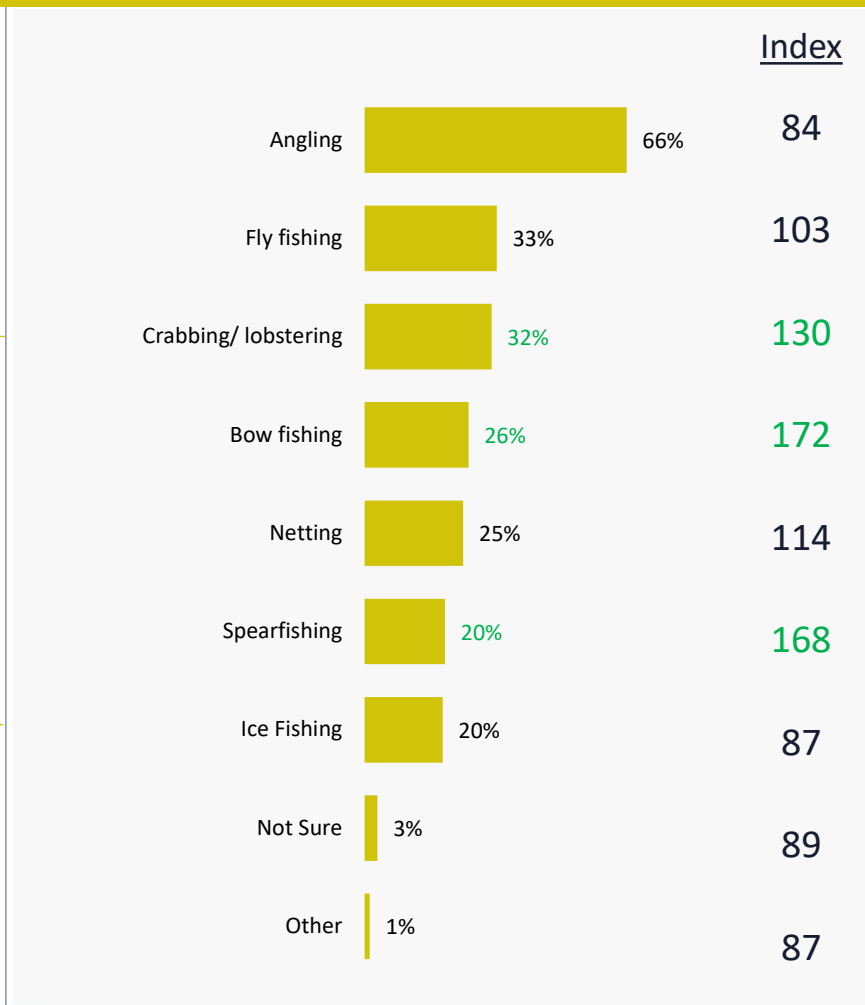
Length	Percentage	Index
Less than 1 day	30%	78
Day trip	47%	107
Weekend trip	21%	135
Longer than weekend	3%	113

TYPE OF FISHING

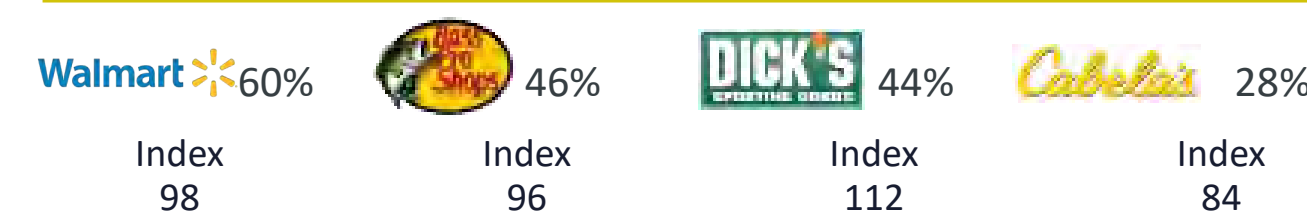
Type	Percentage	Index
For sport	14%	255
For leisure	86%	91

Type	Percentage	Index
Seasonally	40%	95
Year-round	43%	102
Special occasion	17%	109

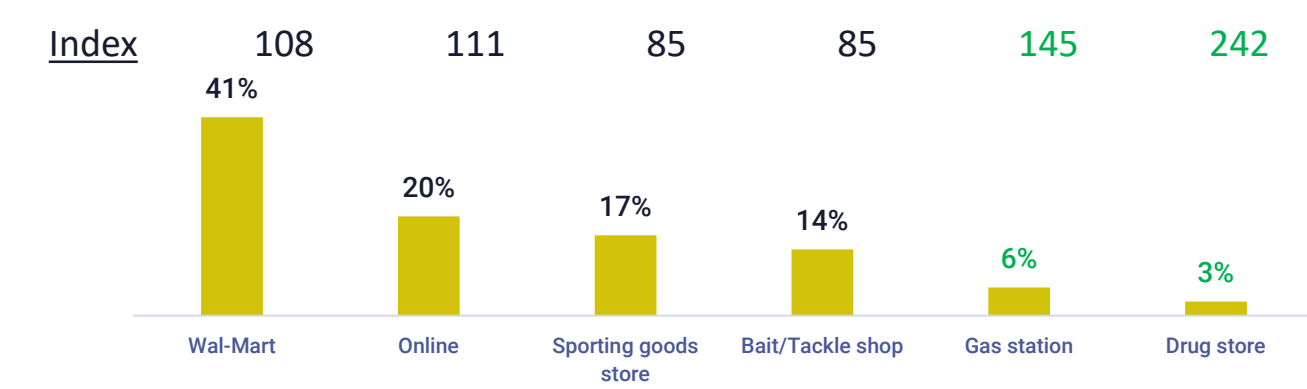
Type	Percentage	Index
Catch and release	50%	99
Keep to eat	50%	101



RETAILERS SHOPPED



LICENSE PURCHASE LOCATIONS



Green indicates over index versus total
Red indicates under index versus total

LUKEWARM OCCASIONALISTS – Who Are Boaters

About 4 in 10 Lukewarm Occasionalists who are boaters own their own boat, most typically a motor boat. They primarily boat in lakes and more say they intend to boat more frequently vs. less frequently in the future.



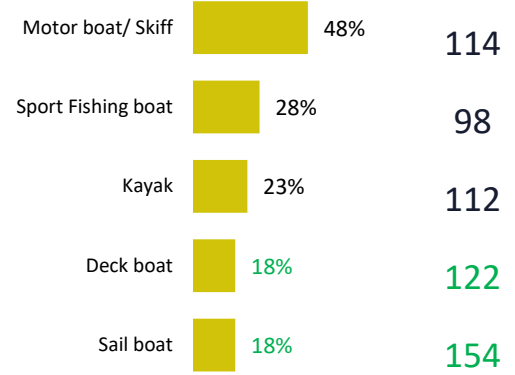
BOATING



Own a Boat

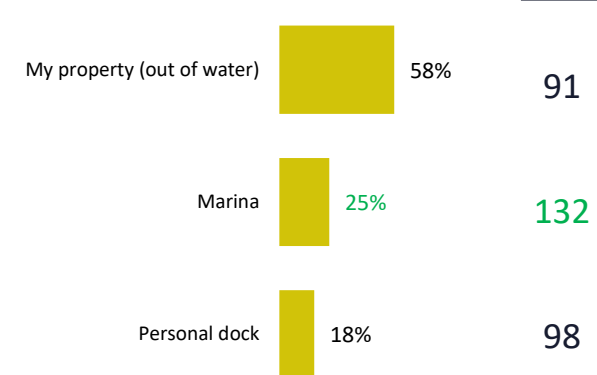
40%
Index
107

TOP 5 BOAT TYPE OWNED



Only Top Responses Shown

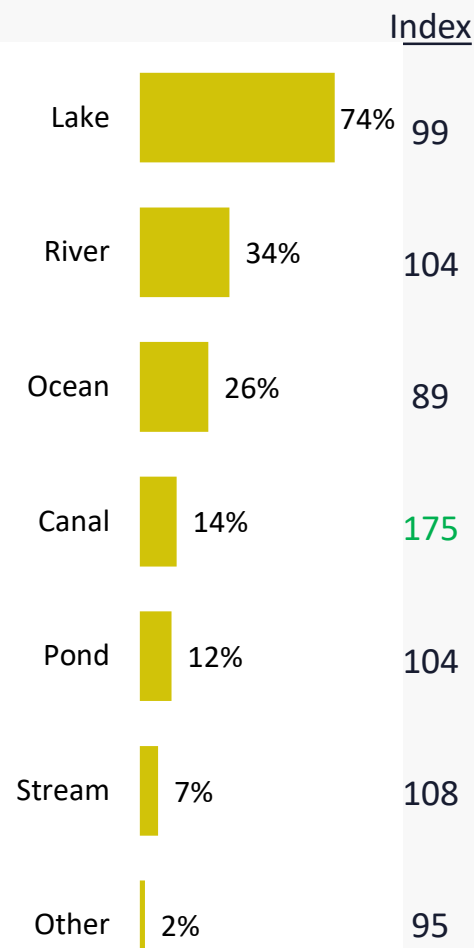
WHERE STORE BOAT



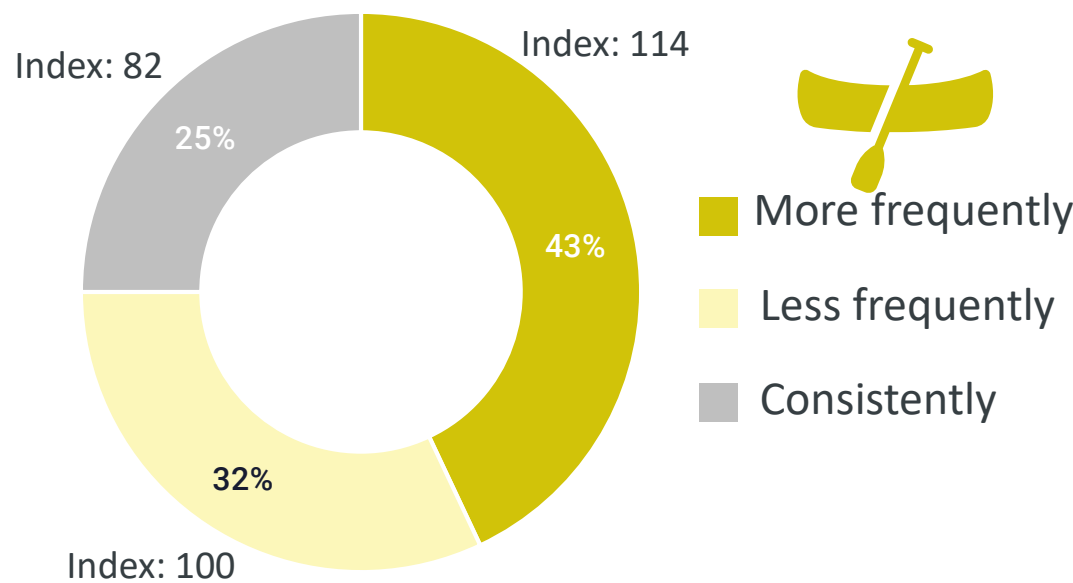
TYPE OF BOATING TRIP

Distance	Percentage	Index
Less than 1 hour	29%	58
1-2 hours	57%	157
3+ hours	14%	106
Length		
Weekend getaway	32%	88
Part of trip, but not the purpose	32%	76
Day getaway	30%	70
Evening activity	18%	101
Morning activity	16%	91
3+ day trip	15%	76
Afternoon activity	13%	93
Activity		
Ride around	63%	85
Fish	58%	90
Water Sports	44%	94
Anchor and Swim/ Sunbathe	38%	74
Transportation	22%	113

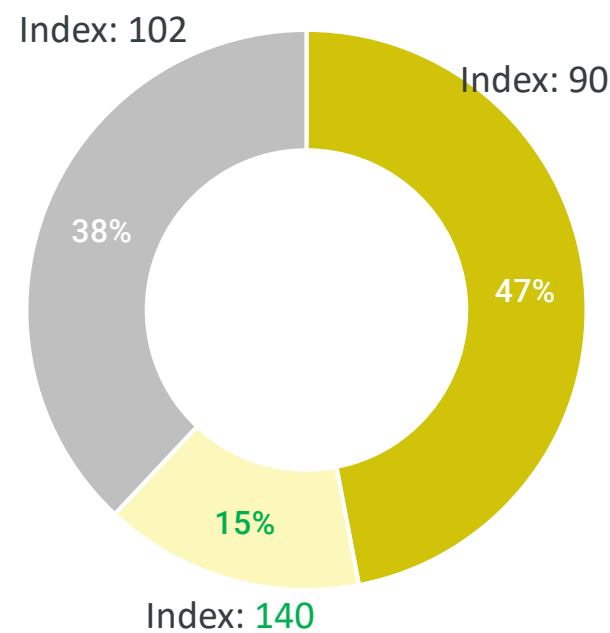
TYPE OF WATER BOAT IN



BOATING FREQUENCY P2Y



FUTURE BOATING FREQUENCY

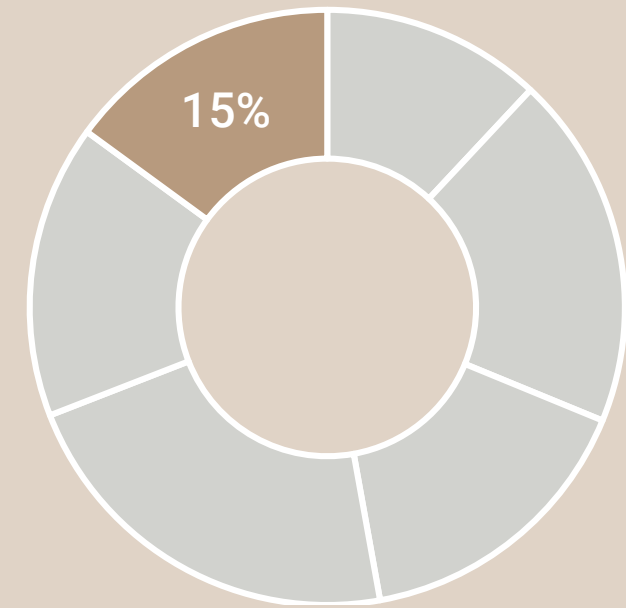


TIME OF YEAR



Green indicates over index versus total
Red indicates under index versus total

TARGET SEGMENT: UNCOMMITTEDS



KEY THEMES:

- 1** *Of all the segments, Uncommitteds are least interested in outdoor activities and least interested in fishing & boating.*
- 2** *They are least likely to get enjoyment out of fishing & boating. As a result, it would be very difficult to attract this group.*



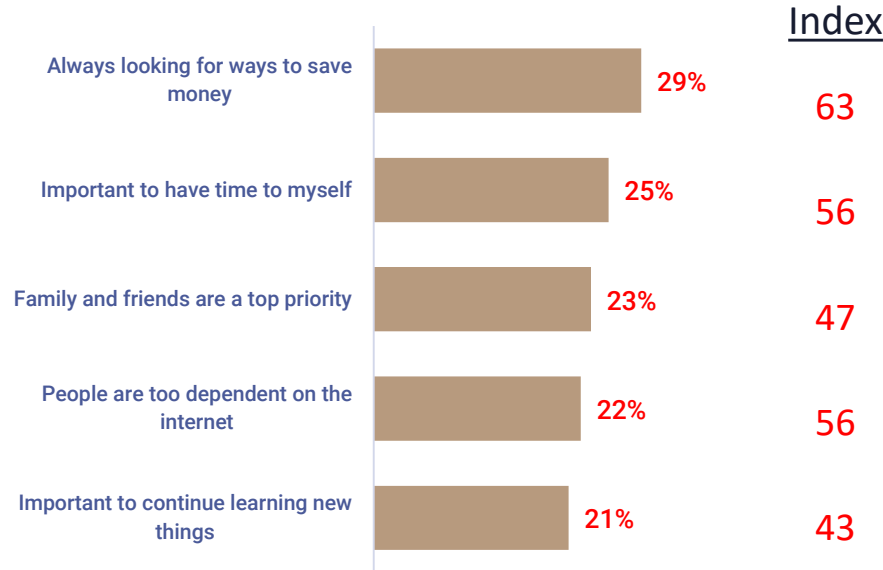
UNCOMMITTEDS

Uncommitteds are more likely to be boaters than anglers, but for both activities, their frequency of participation is low. Their enjoyment and interest in other outdoor activities is also lower than other segments. Additionally, this segment slews older with fewer kid households.

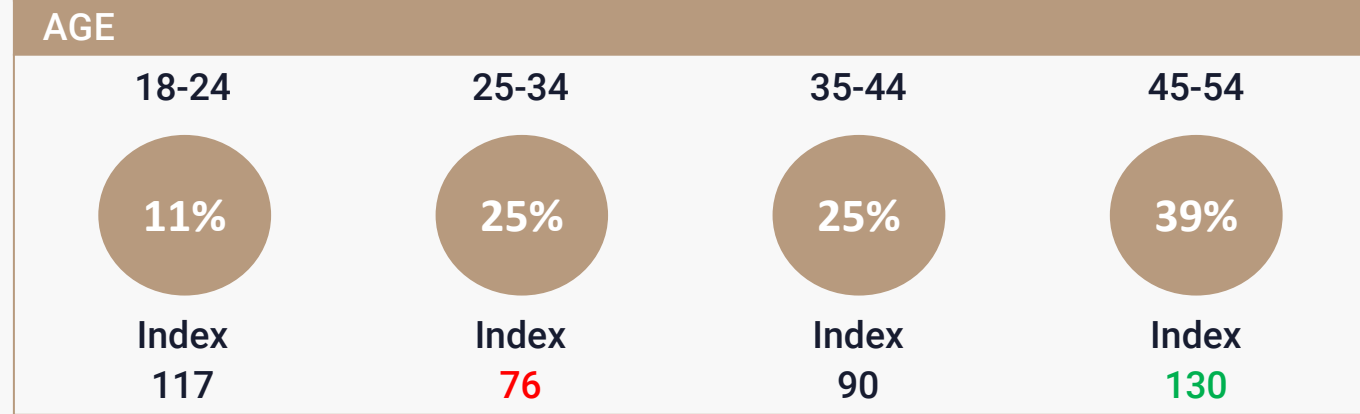


SEGMENT SIZE
(% OF PEOPLE)
15%

TOP ATTITUDES
(Completely Agree)



DEMOGRAPHICS

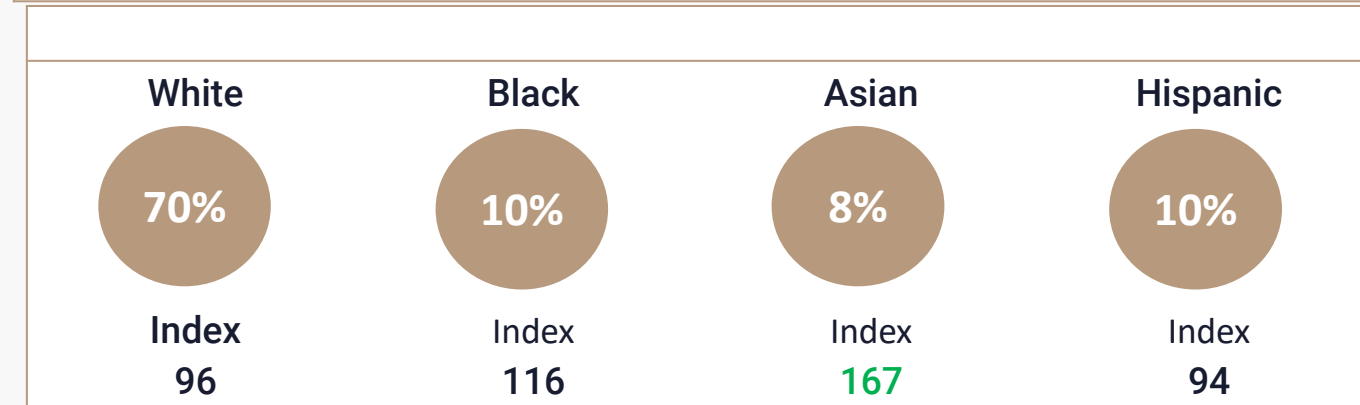


Index

GENDER	47% Male/ 53% Female	110/ 93
INCOME (mean)	\$65,500	88
MARITAL STATUS	44% Married	83
HH SIZE (mean)	2.7	88
CHILDREN IN HH	33%	68

REGION

Region	Northeast	Midwest	South	West
Percentage	20%	20%	43%	18%
Index	109	92	110	82



Green indicates over index versus total
Red indicates under index versus total

OUTDOOR ACTIVITY

Only Top Responses Shown

OUTDOOR ACTIVITY ENJOYMENT

Enjoy extremely

Activity	Percentage	Index
Motorcycling	23%	67
Beach	22%	43
Target shooting	21%	64
Tailgating	17%	44
Wildlife/ bird watching	14%	39
Backpacking	13%	48
Jet skiing	11%	31
Paddle boarding	11%	41
Visit parks	11%	30
Hunting	11%	32

OUTDOOR ACTIVITY INTEREST

Very interested

Activity	Percentage	Index
Beach	24%	39
Visiting parks	12%	25
Tailgating	9%	30
Fishing	8%	26
Picnicking	8%	20
Gardening	8%	23
Lake/ river	7%	14
Target shooting	7%	30
Camping	7%	19

BOATERS

1.8

Avg. # times
boat per year

6%

Index
23

Index
50

ANGLERS

1.7

Avg. # times fish
per year

11%

Index
34

Index
36

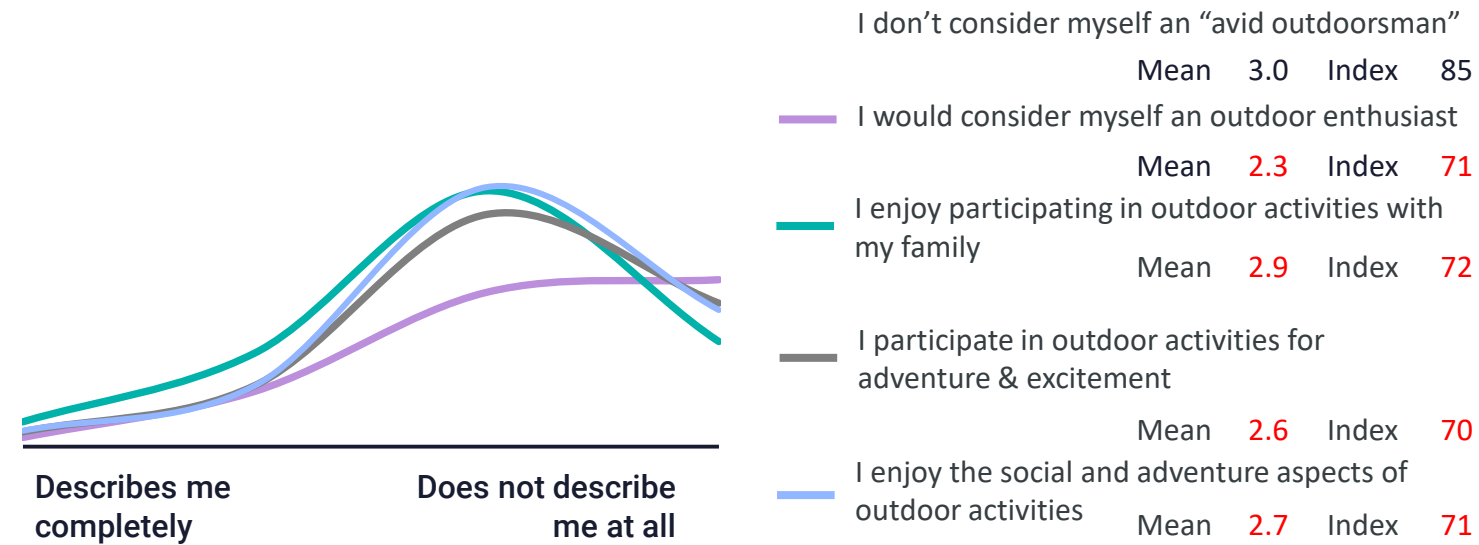
ANGLERS & BOATERS

3%

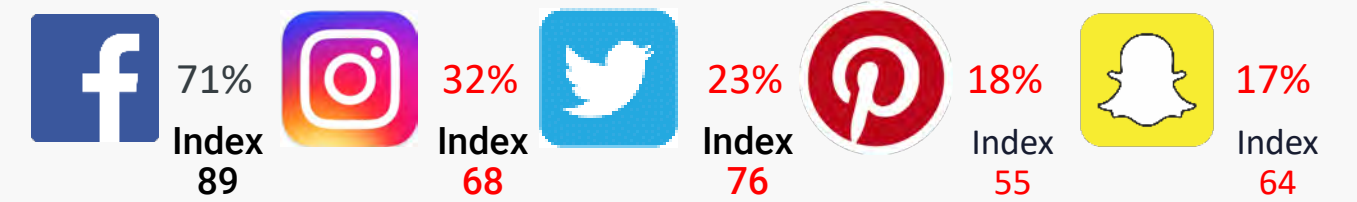
Index
20

UNCOMMITTEDS

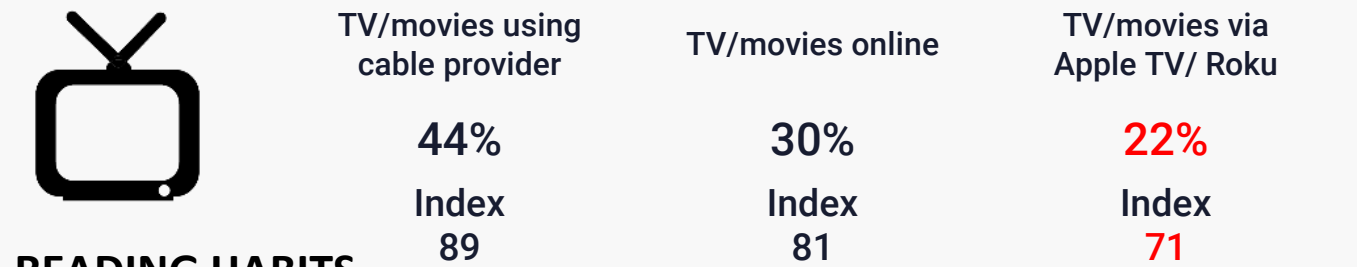
Uncommitteds have fewer hobbies and are less active in fitness activities. They are less likely to use technology for information and entertainment – with below average use of social media and browsing the internet.



TOP 5 SOCIAL MEDIA SITES USED



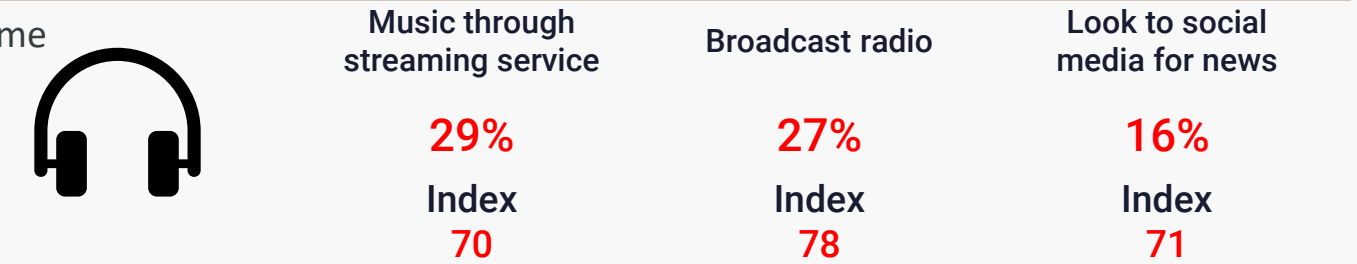
TELEVISION HABITS



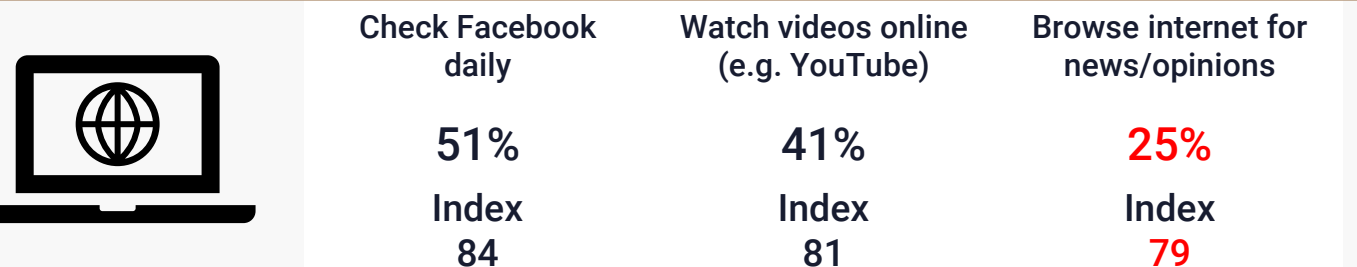
READING HABITS



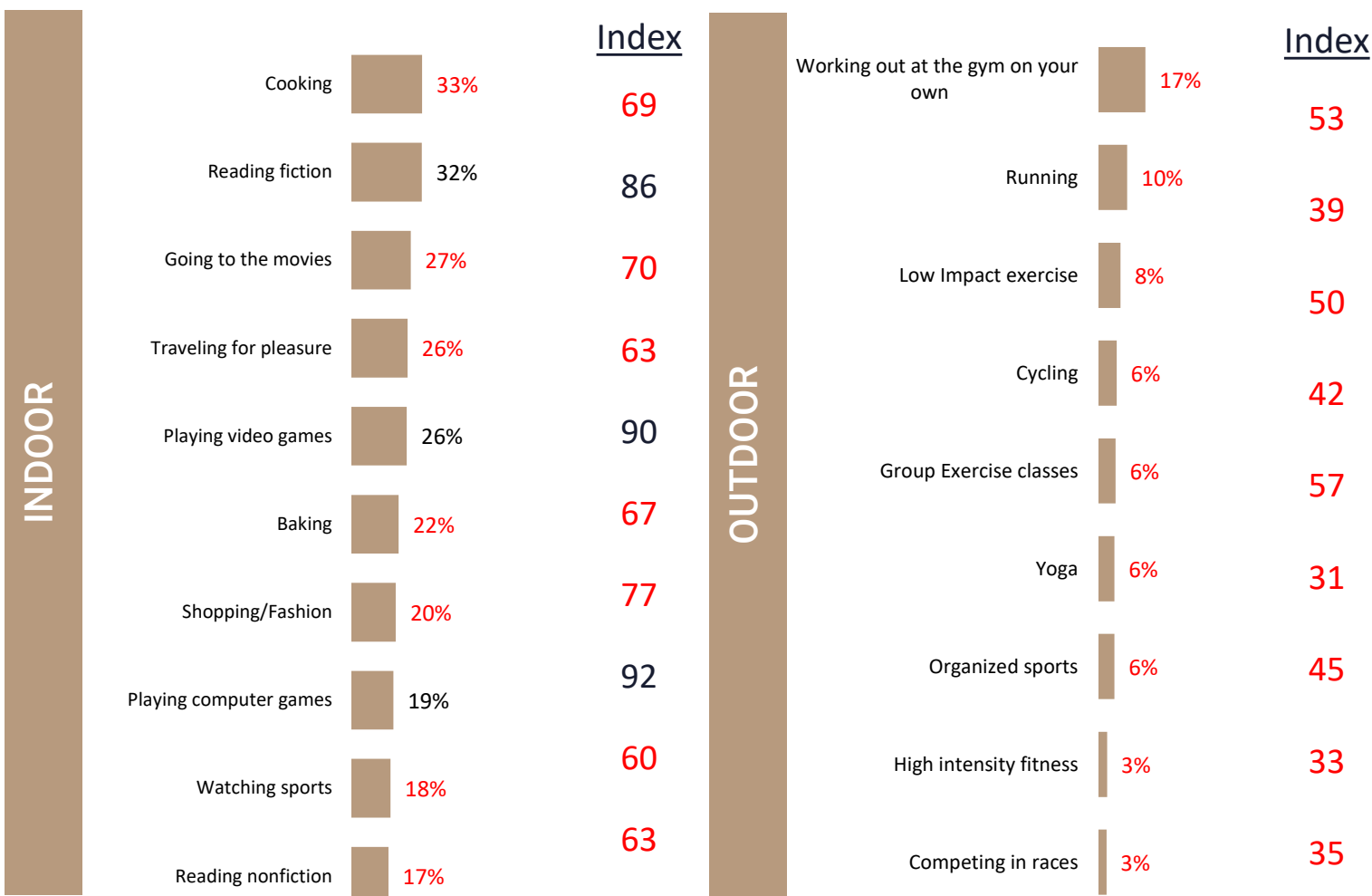
LISTENING HABITS



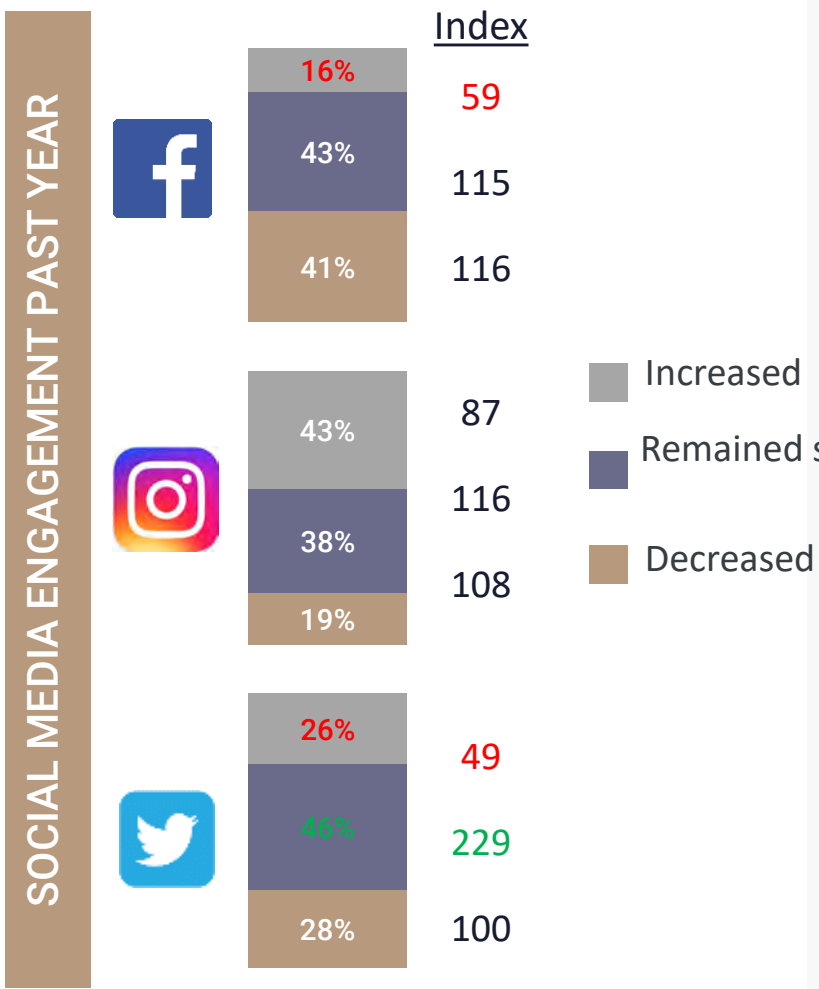
INTERNET BROWSING HABITS



HOBBIES



Only Top Responses Shown



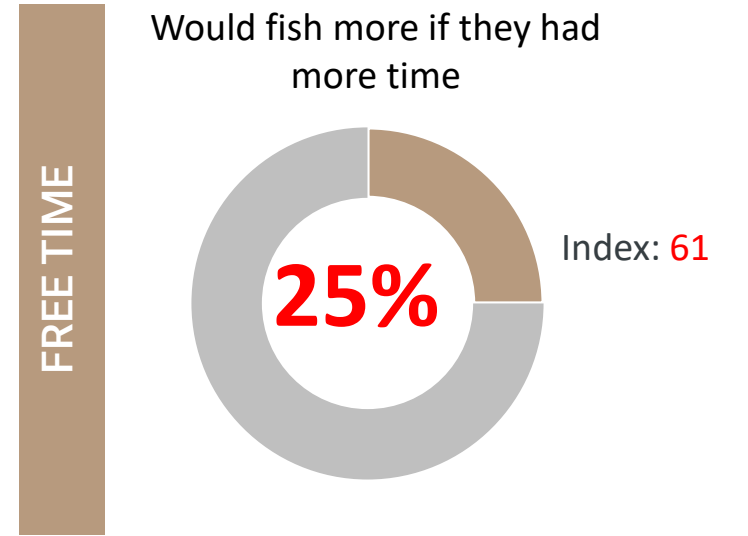
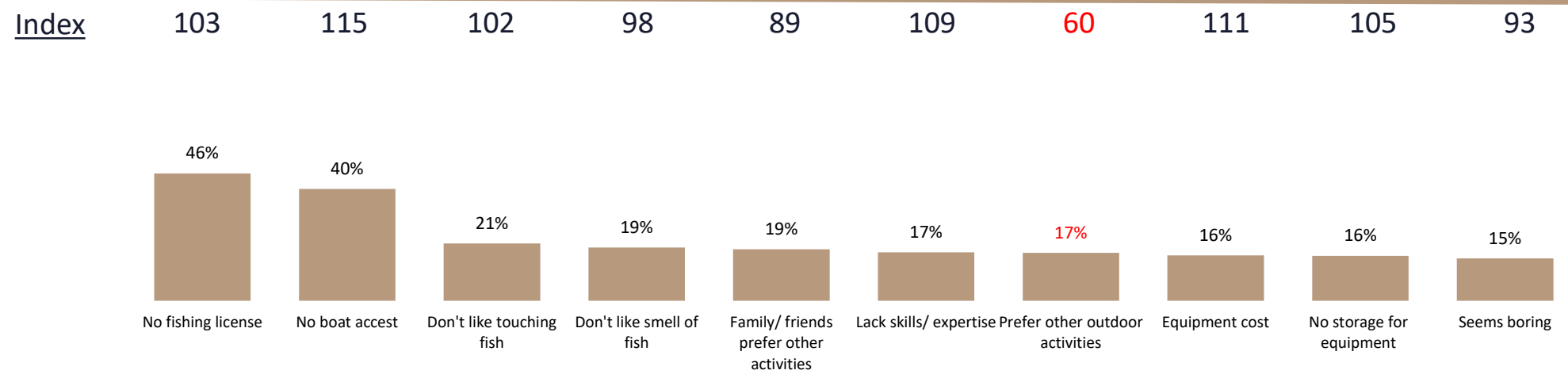
Green indicates over index versus total
Red indicates under index versus total

UNCOMMITTEDS

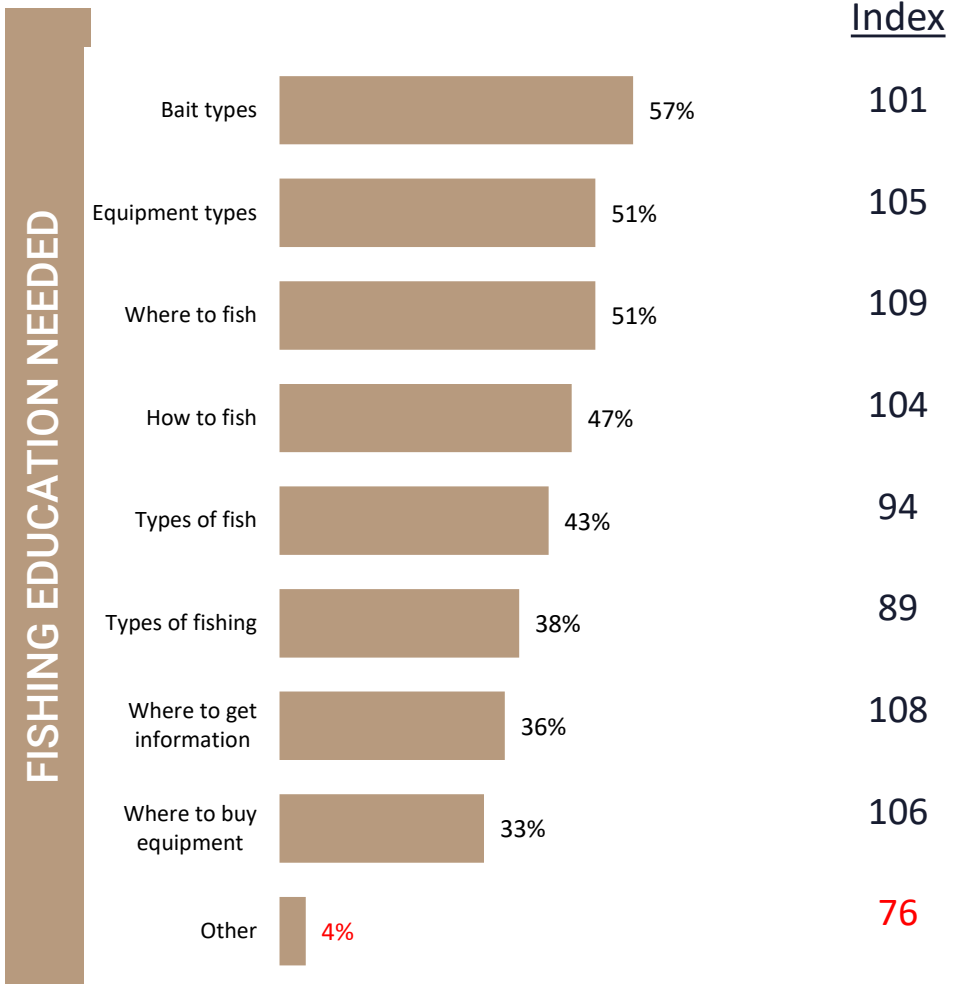
Uncommitteds acknowledge that they aren't particularly prepared for going fishing and even if they had extra time, only one-quarter of them said they'd use it to fish.



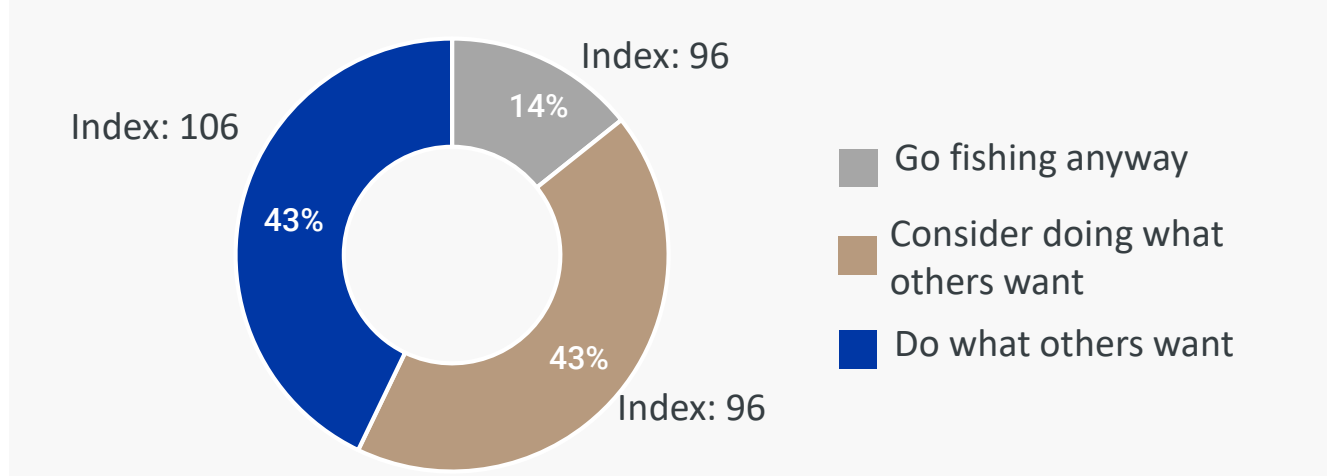
TOP FISHING BARRIERS (Completely Agree)



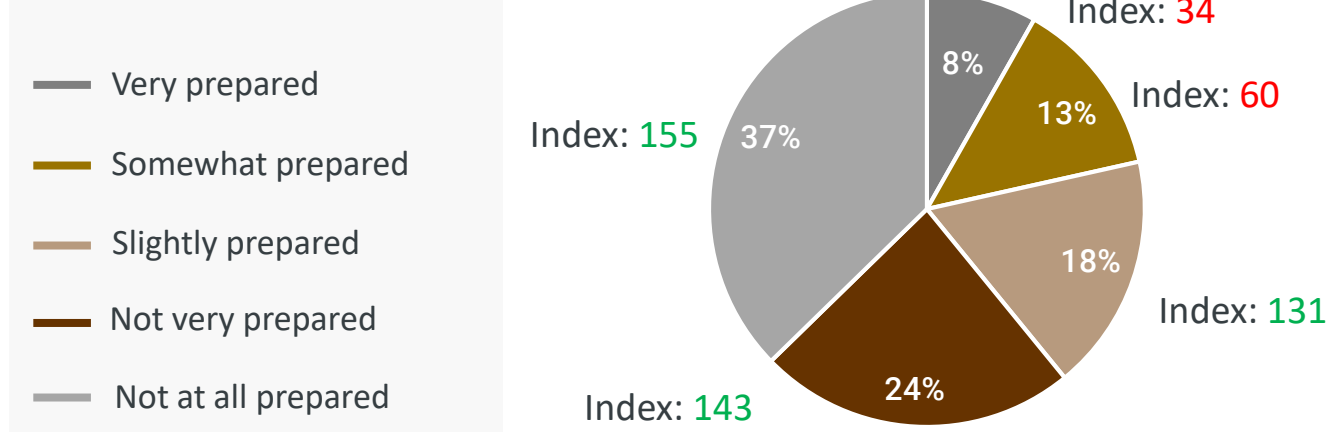
FISHING EDUCATION NEEDED



PRIORITIZE FISHING



FISHING PREPAREDNESS



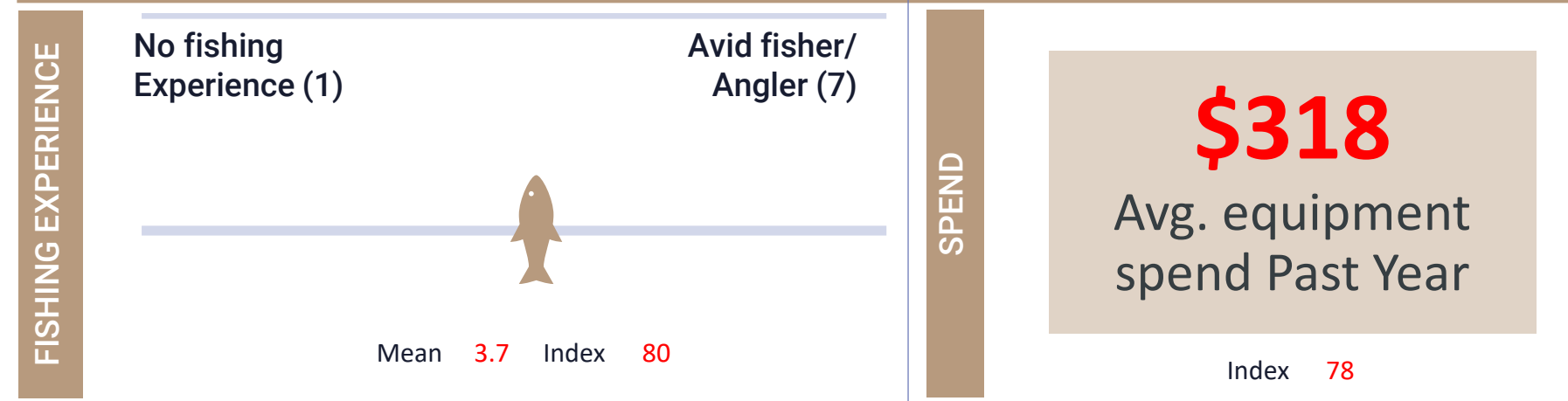
Green indicates over index versus total
Red indicates under index versus total

UNCOMMITTEDS – Who Are Anglers

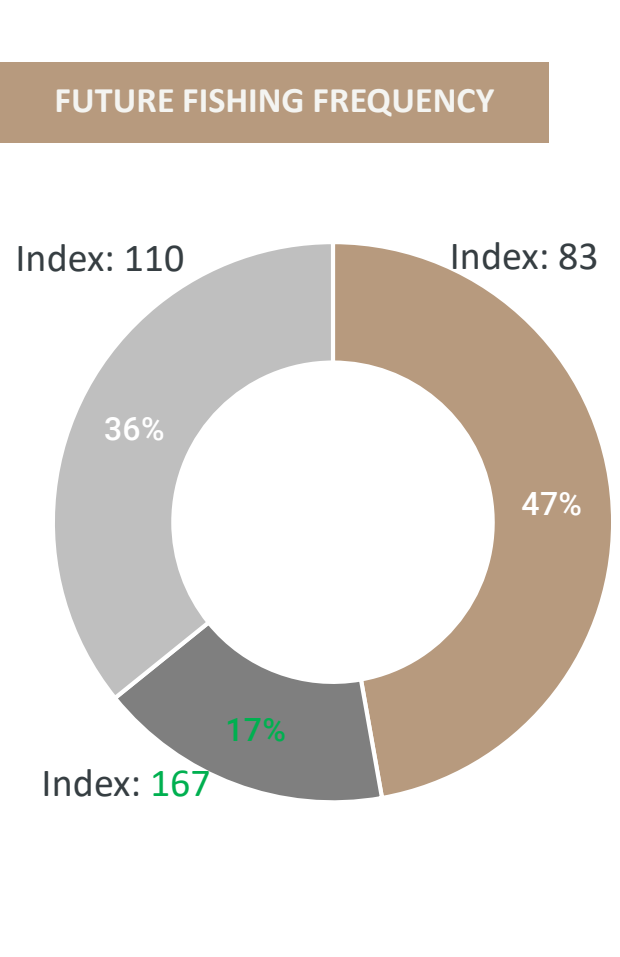
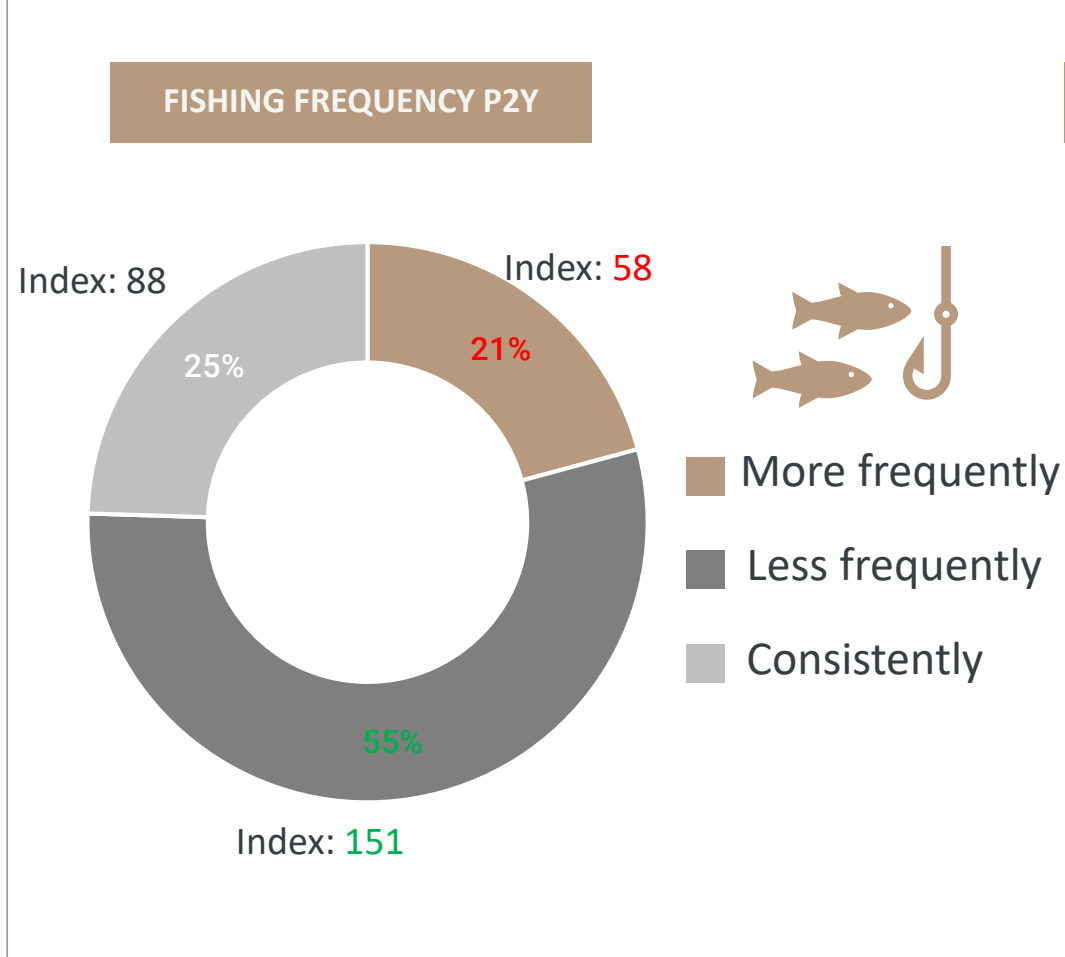
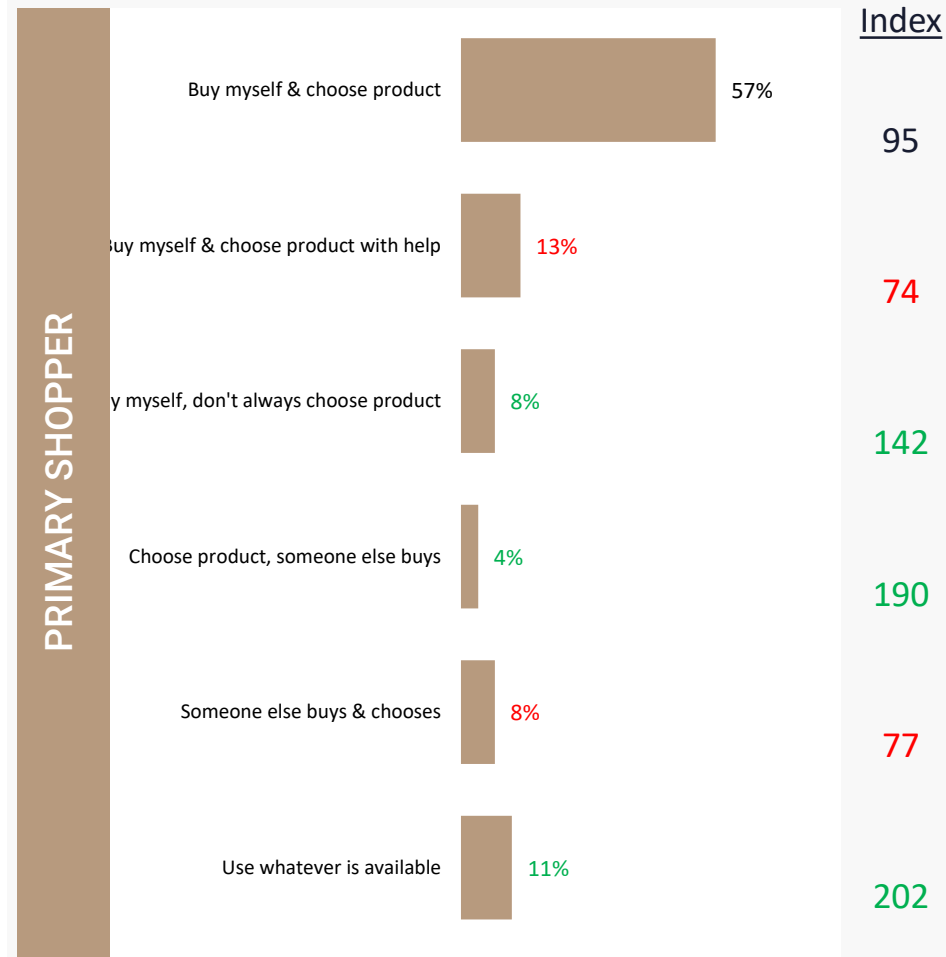
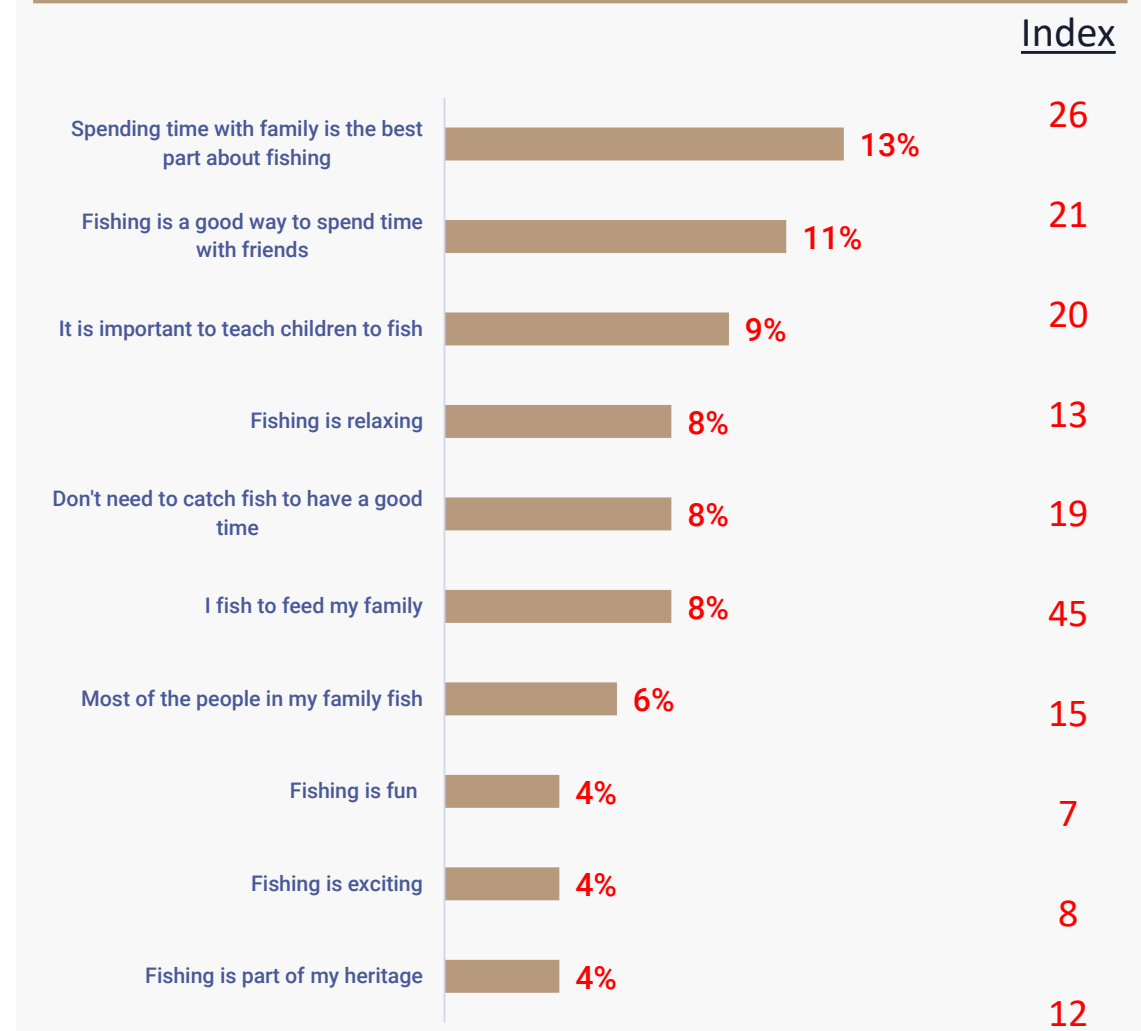
Uncommitteds who fish spend less than other segments and have less experience. Attitudinally, they don't particularly engage with the sport of fishing and are less likely to consider it fun, relaxing or a good with to spend time with people.



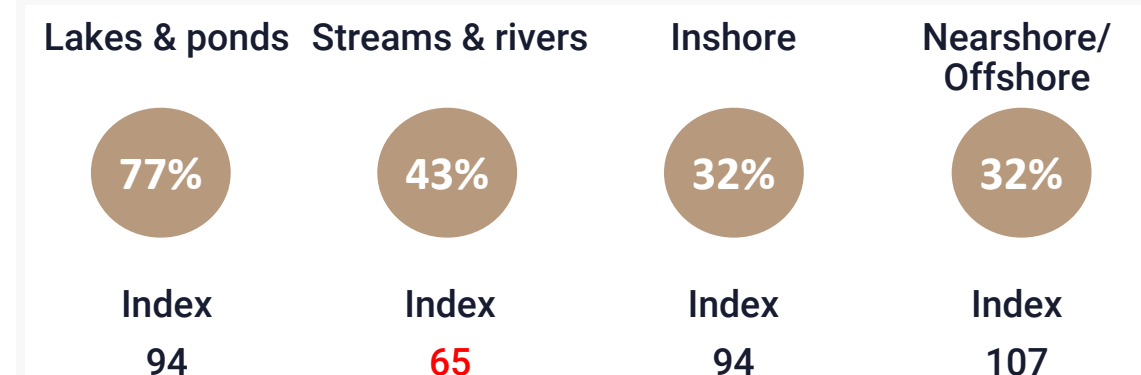
FISHING



FISHING STATEMENT AGREEMENT *(Completely agree)*



TYPE OF WATER



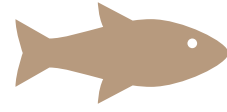
Green indicates over index versus total
Red indicates under index versus total

UNCOMMITTEDS – Who Are Anglers

OF the Uncommitteds who fish, they tend to do it more seasonally or for special occasions. Fewer than average have fishing licenses, saying that they don't fish enough to make it worth the cost.



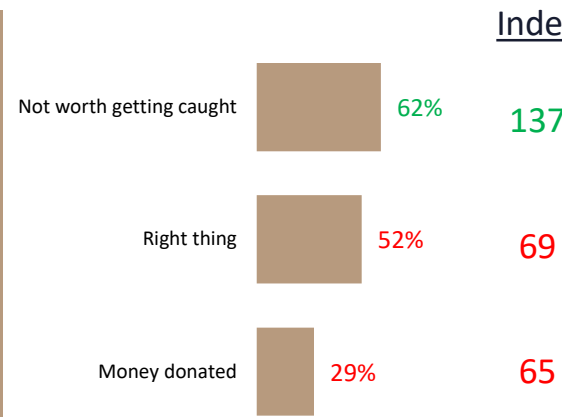
FISHING



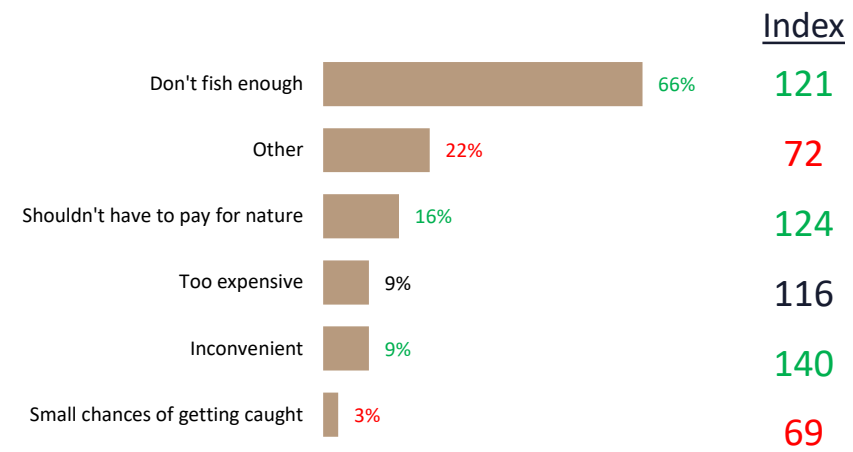
Have Fishing License

40%
Index
61

REASON WHY HAVE



REASON WHY DON'T HAVE



TYPE OF FISHING TRIP

Distance	Percentage	Index
Less than 1 hour	59%	102
1-2 hours	34%	97
3+ hours	8%	99

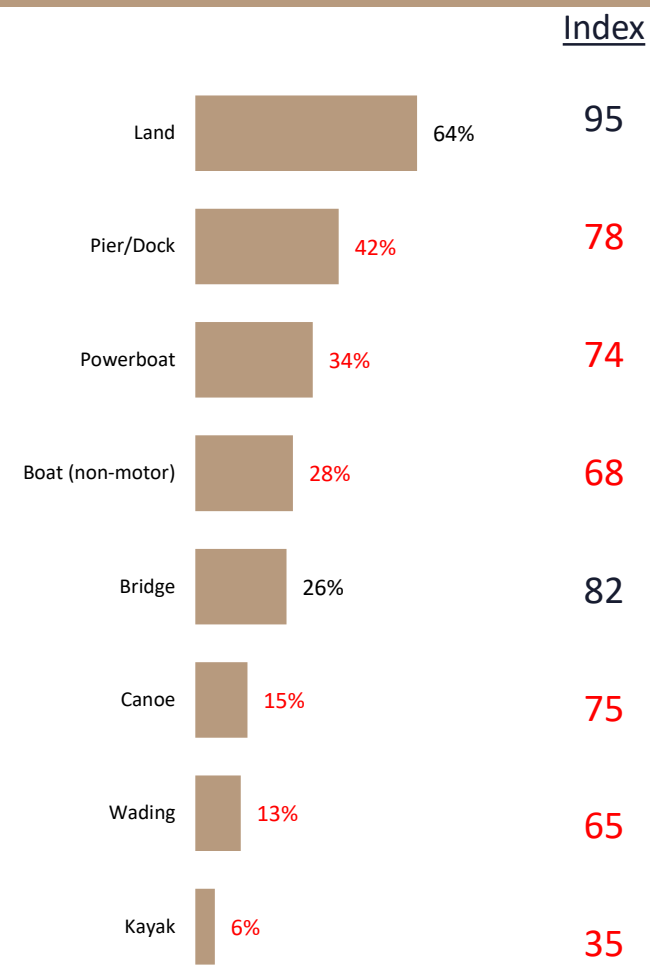
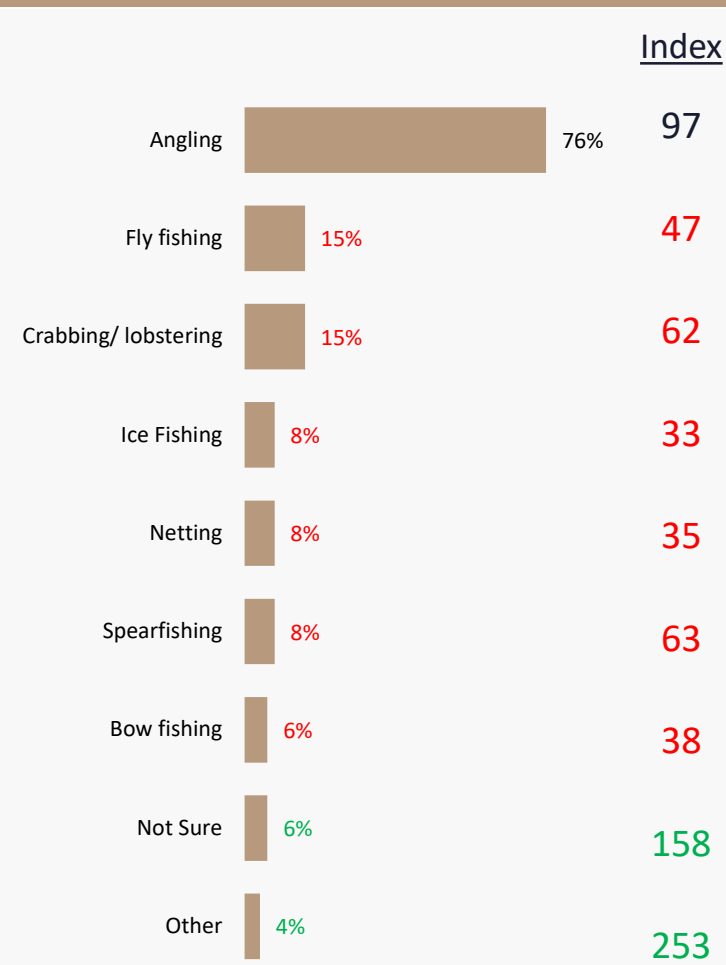
Length	Percentage	Index
Less than 1 day	45%	118
Day trip	40%	90
Weekend trip	15%	98

TYPE OF FISHING

For sport	6%	102
For leisure	94%	100

	Percentage	Index
Seasonally	51%	119
Year-round	23%	54
Special occasion	26%	170

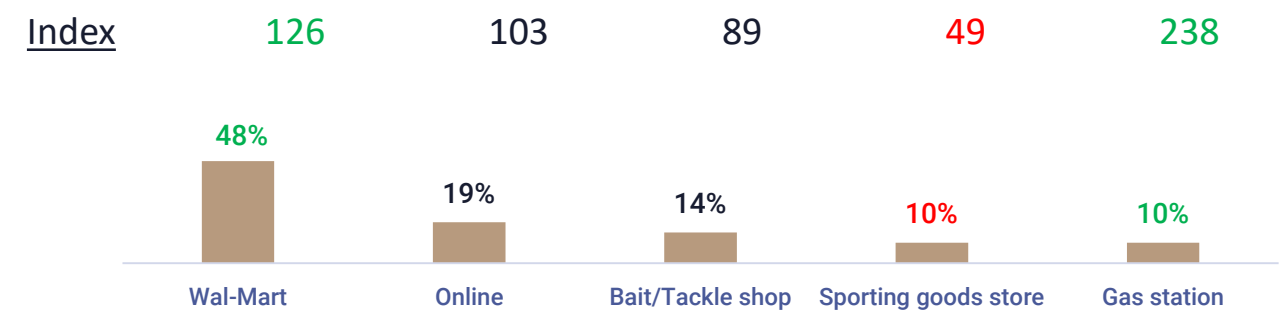
	Percentage	Index
Catch and release	45%	90
Keep to eat	55%	111



RETAILERS SHOPPED



LICENSE PURCHASE LOCATIONS



Green indicates over index versus total
Red indicates under index versus total

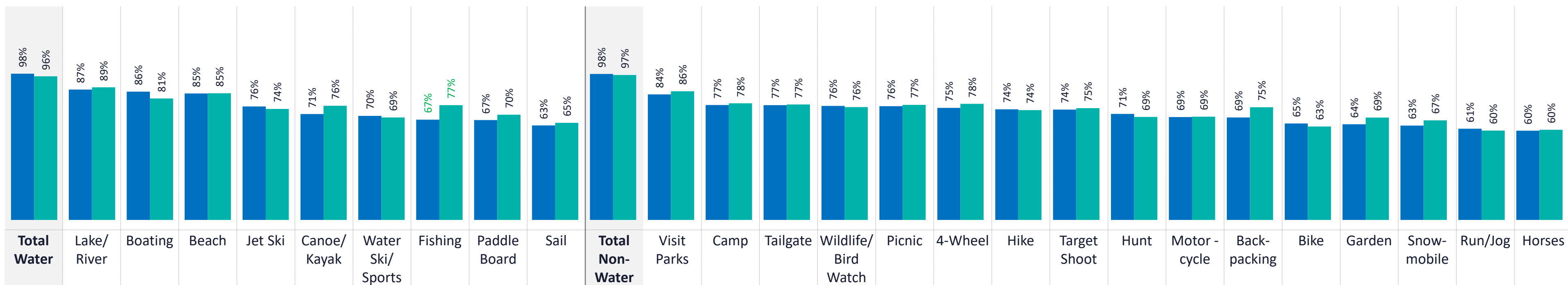


Appendix

outdoor activities enjoyment

WHAT?

ENJOY EXTREMELY/ VERY MUCH



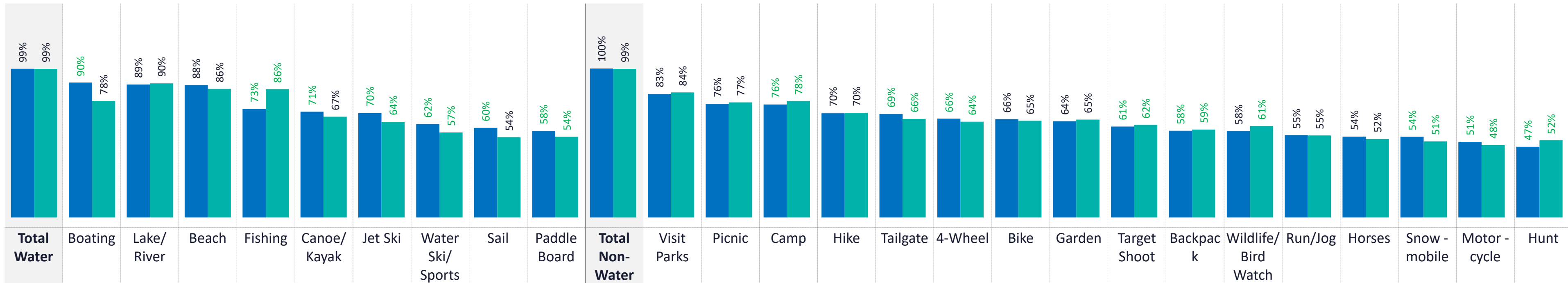
■ boaters
■ anglers



Base: Total boaters (n=701), Total anglers (n=988)
 S2. And, how much do you enjoy each of the following types of activities? Select one for each.
 Indexing to Total ≥ 120, ≤ 80

future participation interest in outdoor activities

VERY/ SOMEWHAT INTERESTED IN FUTURE PARTICIPATION



■ boaters
■ anglers

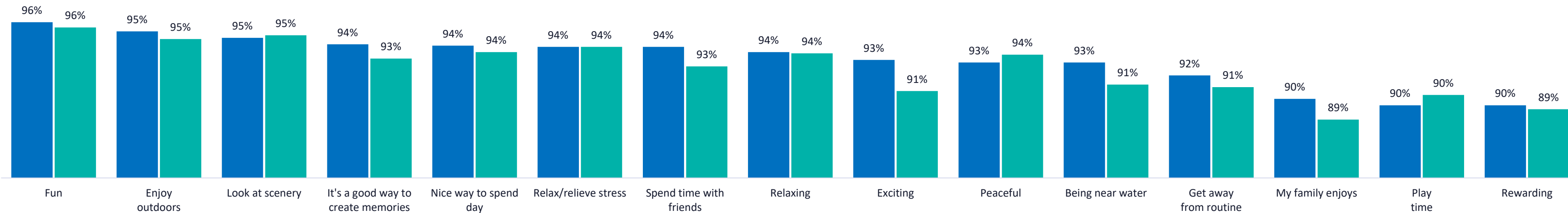


Base: Total boaters (n=701), Total anglers (n=988)
 S3. How interested are you in participating in each of the following outdoor activities in the future? Select one for each.
 Indexing to Total ≥ 120, ≤ 80

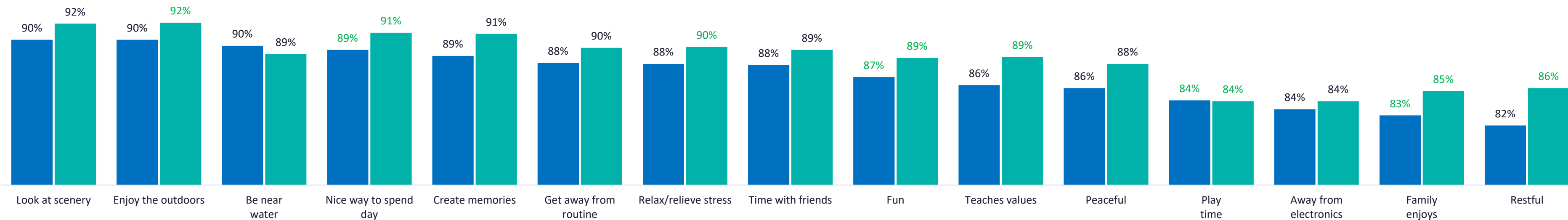
why are respondents fishing & boating

boaters
anglers

MOTIVATIONS FOR OUTDOOR ACTIVITIES (Agree Completely/ Somewhat)



MOTIVATIONS FOR FISHING/BOATING (Agree Completely/ Somewhat)



Base: Total boaters (n=701), Total anglers (n=988)

A2. We would like to understand your current or potential motivations for participating in outdoor activities. Thinking about the activities you currently partake in, or would be interested in partaking in, please select how much you agree with each of the following statements. Select one for each. | A3. Now, thinking specifically about what would be appealing to you about fishing/boating, please rate your agreement with each of the following statements.

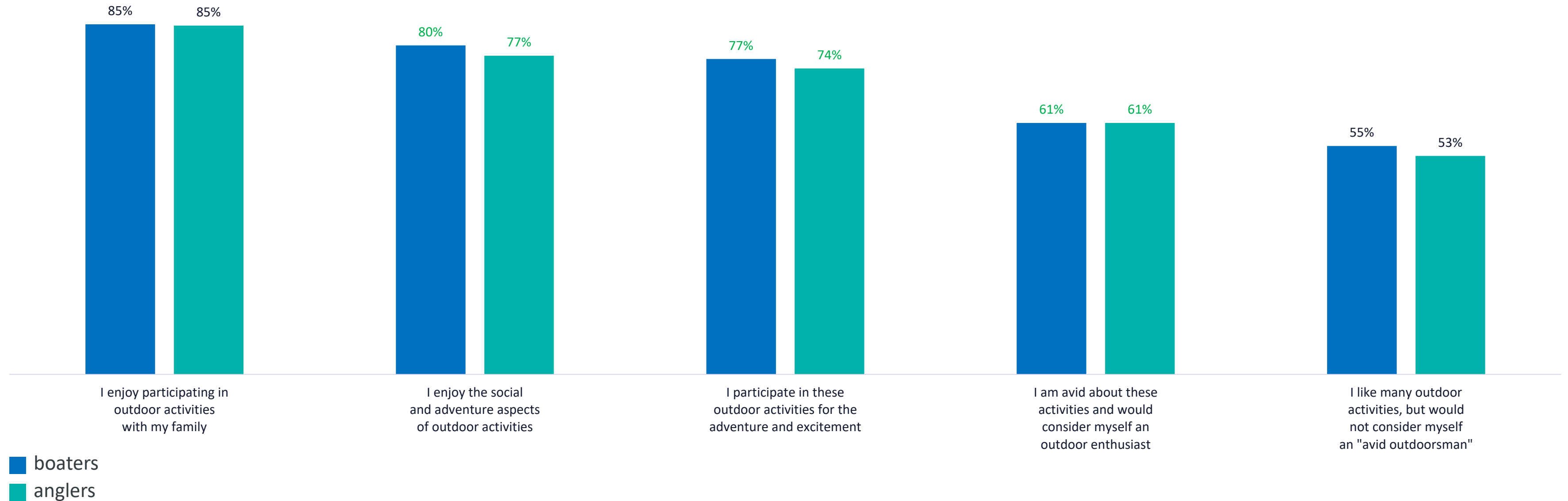
Indexing to Total $\geq 120, \leq 80$



anglers & boaters in old segments

Overall, the majority of anglers & boaters consider themselves to be outdoor enthusiasts who enjoy the social benefits and adventure/excitement that outdoor activities provide them.

DESCRIBES ME COMPLETELY/MOST OF THE TIME



Base: Total boaters (n=701), Total anglers (n=988)
S4. Please rate how much each of the following statements describes you. Select one for each.
Indexing to Total $\geq 120, \leq 80$

「thank you.」