

PSYCHOLOGY OF CHURN

Understanding Fishing &
Boating Attrition

May 2024

PROJECT BACKGROUND

Despite a significant increase in participation following the pandemic, there continues to be a **downward trend in recreational boating and fishing participation**.

RBFF, as a proud partner to the boating and fishing communities, is looking to understand more about what causes people to lapse in participation and is seeking primary research to help provide strategic recommendations and tactics to drive retention through its partnerships with consumer-facing stakeholders.

Previous research has identified consumers struggle with balancing time and responsibilities, but RBFF is seeking a deeper look into the **psychology and behavioral science behind what makes it easier to trade boating and/or fishing for other activities**.

Ultimately, RBFF is hoping to **develop profiles of those most likely to lapse** in the activities that will guide both RBFF and their stakeholders in retention-related activities and outreach.



OUR JOURNEY

Social Listening

Synthesio explored Social and Online conversations to understand the real-time organic feedback from consumers discussing fishing and fishing from boats and what is contributing to a decline in participation and retention.

These insights helped craft the community and unpack it and provided a guide of the consumer conversations.

Completed ~ August 2023

We're here

Quantitative Sizing & Persona Identification

We fielded a quantitative survey to validate and size the barriers and triggers to lapsing fishing and boating and identify key personas of lapsed participants.

The incorporation of key behavioral science theories allows us to measure, size and assess the psychology behind attrition.

Community Deep-Dives

After capturing social trends around boating, fishing and fishing from boats, a community discussion allowed us to dive deeper into the key reasons why consumers leave the sports and identify top barriers and triggers for quant testing.

The community team partnered closely with SIA, BeSci and MSU to collaborate on insights and apply Ipsos strategy across project phases.

Completed ~ January 2024

In progress!

Persona Illumination

To add **color** to key personas, participants from the quant phase engaged in follow up video diaries in our community.

The activity will be tailored to focus on how stakeholders can activate retention-focused outreach and ideate potential efforts to continue engaging Boaters and Anglers.

THE DETAILS

WHAT

- 15-minute Online Survey, with MaxDiff and Persona Clustering, with the following goals:
 - **Sizing the Headwinds:** the barriers that make it difficult
 - **Developing Personas:** based on most impactful barriers and profiling who these people are
 - **Identifying the Tailwinds:** what will encourage people to do it more

WHEN

- 15-minute survey fielded through our community platform with behavioral science lens
 - Fielded: March 27 – April 8, 2024

SAMPLE

Groups Examined in this Report				
	Lapsed Anglers	Retained Anglers	Lapsed Boaters	Retained Boaters
Total	n=301	n=100	n=150	n=100



BEHAVIORAL SCIENCE OVERLAY

Behavioral Science (BeSci) Has Been Integrated Throughout our Research

By integrating BeSci, we're able to explore the hidden, or nonconscious motivations for why Anglers and Boaters have lapsed. We have integrated this lens throughout the research processes and phases to provide additional psychological context—the “why” to the what, who, & where. Validated academic principles and relevant BeSci research insights are incorporated throughout the work to provide concrete and actionable recommendations.



Why Behavioral Science (BeSci)?

- Behavioral science reveals both the conscious and nonconscious ways people use information and make decisions.
- By understanding the way context, experiences, and motivational-mindsets influence activity and choice/attrition, we can help optimize strategies that mitigate or magnify these factors as needed.

Throughout this research, an Ipsos PhD Behavioral Scientist has served as an integrated consultant to ensure this knowledge is incorporated into our research design, analyses, and reporting to shed light on the latent motivations and levers that impact behavior and how to activate against them.

To aptly understand the opportunity of retaining or reactivating Lapsed Anglers and Boaters, it is critical to understand and measure their interest in spending time and being active outdoors. For this reason, we have integrated the consumer segmentation from 2019, which was previously used to identify recruitment targets for Angling/Boating.

AVID ADVENTURISTS	ACTIVE SOCIAL FAMILIES	FAMILY-FOCUSED RELAXERS	LEISURE TIME ENJOYERS	LUKEWARM OCCASIONALISTS	UNCOMMITTEDS
Secondary 2019 Recruit Target	Primary 2019 Recruit Target	Secondary 2019 Recruit Target	Not a Target	Not a Target	Not a Target
<p>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.</p> <p><i>Alternative types of boating/fishing can fulfill need for adventure but will compete with a variety of activities for share of time</i></p>	<p>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’.</p>	<p>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).</p>	<p>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.</p>	<p>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.</p>	<p>Least interested in outdoor activities and least interested in fishing and boating. Least likely to get enjoyment out of fishing and boating. Absence of motivation and interest</p>

EXECUTIVE SUMMARY

Key Insights & Next Steps

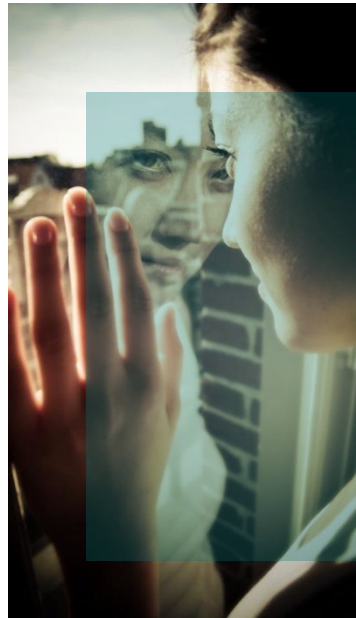


Three key themes emerge that differentiate Lapsed Anglers and Boaters from Retained/Active ones:



01.

Less Affinity
for the
Outdoors



02.

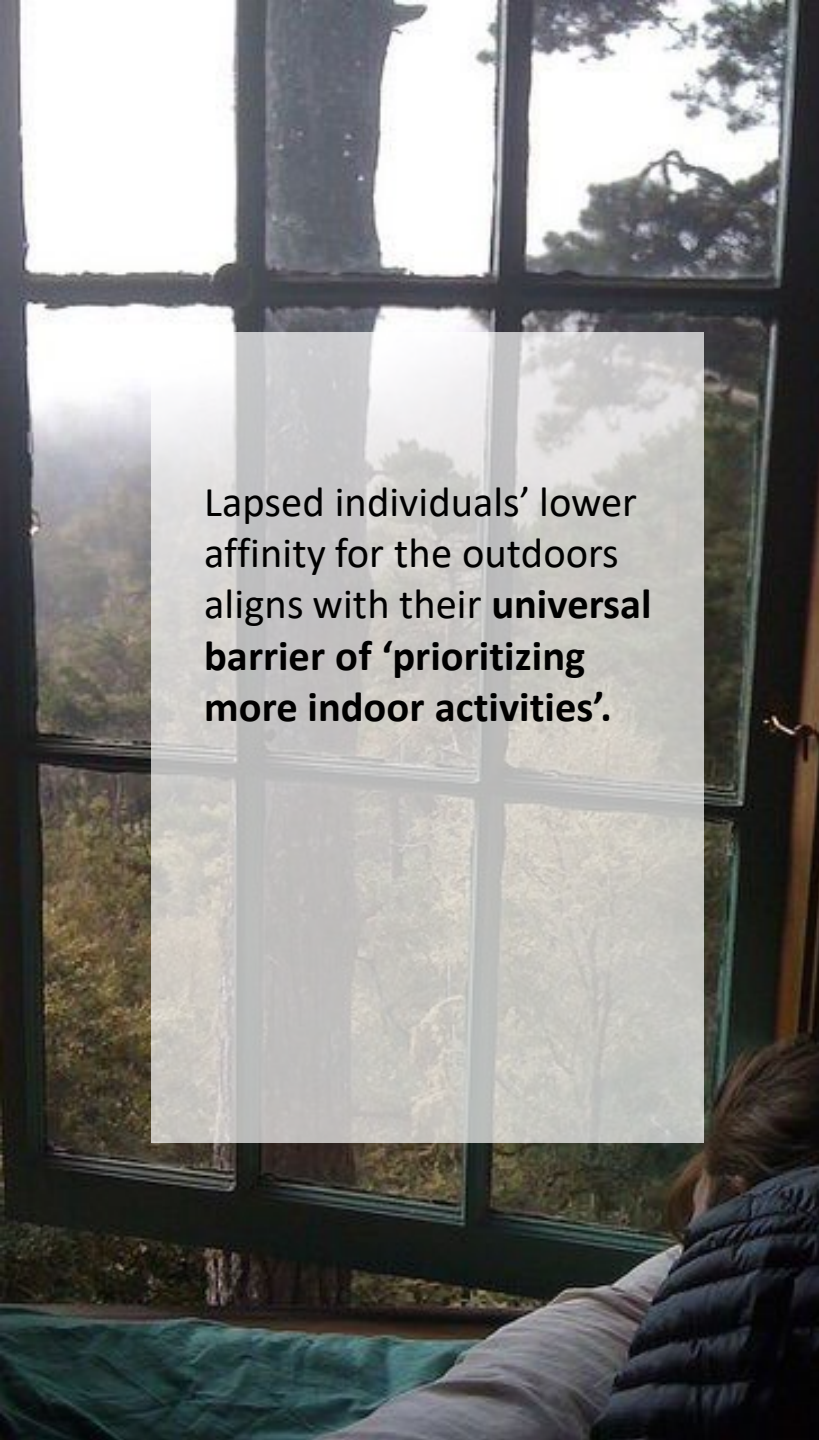
Lack of a Shared
Identity with
Anglers/Boaters



03.

Less Positive
First Impressions
& Lower
Commitment

01. Lapsed have a lower affinity for the outdoors



Lapsed individuals' lower affinity for the outdoors aligns with their **universal barrier of 'prioritizing more indoor activities'**.

OTHER ACTIVITIES COMPETING FOR TIME

Retained individuals partook in a **wider range of outdoor activities** within the past year, compared to those who Lapsed.

PREFERENCE FOR INDOOR ACTIVITIES

Despite both groups having equal amounts of leisure time, the way they use their time differs. **Lapsed individuals lean towards indoor activities, like watching movies at home, cooking, and reading**, whereas Retained take more advantage of a variety of activities, both indoors and out.

LESS INTEREST/ MOTIVATION

Lapsed individuals predominantly align **with 'Leisure-Time Enjoyers' and 'Uncommitteds'**. In contrast, the Retained group primarily consists of 'Avid Adventurists' and 'Active Social Families'.

02. Lapsed struggle to see boating/fishing as “for someone like me”

Lapsed individuals’ struggle to see boating/fishing as “for someone like me” aligns with their **universal barrier of not having anyone to go with.**

VALUES & LIFESTYLE

59% of Lapsed individuals say they see **little or no overlap between their own values and life and that of a typical Angler/Boater.**


SOCIAL/COMMUNAL ASPECT

Retained individuals are not only more likely to engage in these activities with a **range of different people**, but also, they are more likely to share these interests with **others in their household.**

ELEMENT OF NOSTALGIA

Those who Lapsed lack the strong nostalgic element to the activity that **kindles a deeper connection** for those who are still active.

03. Lapsed have less positive “first impressions” and show less commitment



Lapsed individuals’ less positive “first impressions” that lead to lower persistence aligns with their **universal barrier of choosing to do other things with their time.**

LESS POSITIVE FIRST IMPRESSIONS

While Lapsed individuals’ first impressions of fishing and boating aren’t all bad, they **lack the more positive recollections** possessed by the Retained group.

INFREQUENT ENGAGEMENT

Lapsed individuals did not have frequent engagement with the activities. Prior to their withdrawal, majority of Lapsed Anglers and Boaters **only participated in these activities 1-5 times per year**, suggesting that many only gave these activities **a few attempts before quitting**, and suggesting that realistic **participation for these individuals is occasional at best.**

FAIR-WEATHER PARTICIPATION

Lapsed individuals were fair-weather participants, **mainly participating in spring and summer seasons.** Retained individuals display a more consistent interest, participating year-round.

To generate communications and touchpoints that more intuitively align and resonate with these participants, it is key to understand their underlying mindsets and motivations. The below bind together the key **unconscious motivations of Lapsed individuals**:



Productivity Orientation

1 in 3 Lapsed Anglers/Boaters find it difficult to relax (over getting things done)—a significantly higher number than retained.

Highlighting the productivity of activities (e.g., via physical or mental health, family bonding, getting outside, piggybacking on other activities) will be more critical for some in retaining motivation to engage in the activity.



Propensity for Risk

While Retained Anglers & Boaters have penchant for trying new things, Lapsed are more torn between sticking to what they already know.

Reduce the perceived risk of trying angling/boating by trying to “familiar” activities they already partake in.



Variety Seeking/ Routine

In keeping with the “familiar” in their life, they also have a higher tendency to stick to a routine—another reason to **consider ways to build into their familiar routines & activities** versus positioning angling/boating as novel & new.

Based on the key themes, shared barriers, and mindsets of Lapsed individuals, we recommend the following **universal retention strategies** to reach Lapsed (and those likely to lapse in the future) Anglers and Boaters:

1

Socialization

- ❖ Consider organizing (creating better awareness of) **social fishing/boating events**, to create facilitated shared experiences with others
- ❖ **Collaborate with 'Active Social Families' and 'Avid Adventurists'** to share their experiences and passion for the outdoors through mentorship, programming, outdoor events, etc.

2

Current Goals & Routines

- ❖ Piggyback onto **current activities they're already doing**, given Lapsed individuals are 'creatures of habit'
 - E.g., a **book club** that meets for occasional fishing outings, a **dinner club** on a boat
- ❖ Align & emphasize how fishing/boating serve **current higher-order goals**, like health and wellbeing, e.g., emphasizing the mental, physiological, and social benefits of engaging in outdoor activities

3

Identity Expansion

- ❖ Consider creating marketing campaigns that present **broader and more inclusive images of what it means to be an Angler/Boater**—e.g., a casual outdoor hiker, the successful/busy businesswoman who needs a disconnect, caring parent at the local small pond with kids, etc.
- ❖ Amplify or create **groups that tie people together** with similar interests and identities

4

"Second First Chance" Initiatives

- ❖ Consider organizing events or programs **specifically for those who have Lapsed**, offering them a fresh, new experience
 - Include **beginner-level activities**, refreshers, opportunities to receive tips/guidance, all-equipment included, etc. to re-spark their interest
 - Take advantage of the **seasonality of spring and summer (or other fresh starts in their life)** to re-engage Lapsed groups

However, there are additional barriers that impact subsets of Lapsed Anglers/Boaters, allowing us a better understanding and **a more targeted opportunities to reactivate individuals**. The following Personas emerged needing:

GEOGRAPHICAL SUPPORT

This persona consists of Anglers and Boaters who previously fished or boated but now struggle to find locations near them for these activities. If they had guidance on local fishing and boating spots, like in neighborhood parks or ponds that aren't too far from home, they would be more inclined to leisurely engage in fishing and boating again. **They need guidance on places to fish and boat near them.**

- 21% of Lapsed Anglers, 17% of Lapsed Boaters
- Medium Max Potential Reach

MORE ADRENALINE

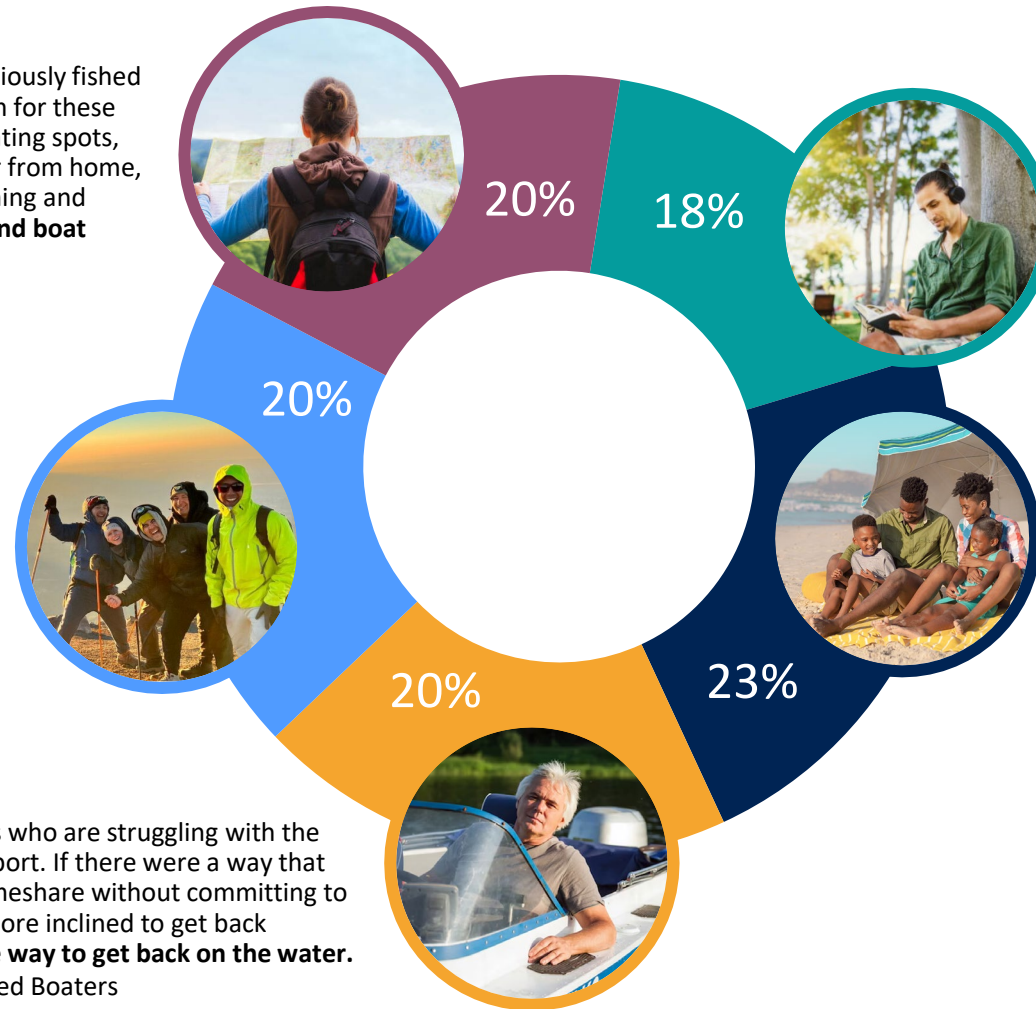
This persona consists mostly of Anglers who have a thirst for adrenaline and more physically engaging activities. If there were ways to incorporate the thrill of physical outdoor activities with fishing, they would be more inclined to try again. **They need fishing to meet the thrill of their adventurous spirit.**

- 24% of Lapsed Anglers, 12% of Lapsed Boaters
- High Max Potential Reach

AFFORDABLE ACCESS

This persona consists of mostly Boaters who are struggling with the financial burdens that come with the sport. If there were a way that they could rent equipment or split a timeshare without committing to the full cost of a boat, they would be more inclined to get back onboard. **They need a more affordable way to get back on the water.**

- 12% of Lapsed Anglers, 35% of Lapsed Boaters
- Medium-High Max Potential Reach



AN ENTHUSIASTIC BUDDY

This persona consists of Anglers and Boaters who are beginner-level and don't find doing these things alone to be rewarding. **They need someone to go with, to make fishing and boating more rewarding.**

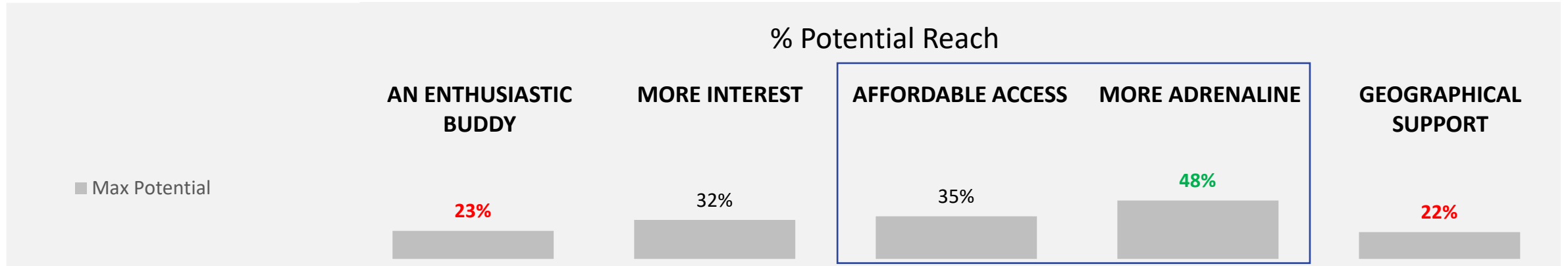
- 17% of Lapsed Anglers, 21% of Lapsed Boaters
- Medium-Low Max Potential Reach

MORE INTEREST

This persona consists mostly of Anglers with a variety of excuses for not participating. Most common are health issues; however, these folks also cite barriers related to the amount of effort required, distance/travel, licensure, and the environment. Coupled with this persona skewing towards not spending time outside, there are few addressable barriers for this group as they are generally uninterested. **They need more interest in the activity overall.**

- 26% of Lapsed Anglers, 16% of Lapsed Boaters
- Medium-Low Max Potential Reach

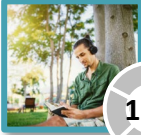









To better gauge their likelihood to return based on their affinity for the outdoors, we sized the outdoor-segments within each persona. **‘Affordable Access’ and ‘More Adrenaline’ personas offer the highest ‘potential reach’** as they consist the most of ‘Avid Adventurists,’ ‘Active Social Families,’ and ‘Family Focused Relaxers’ – consumer segments that enjoy being active outdoors.



		Base: Respondents in Persona	83	103	88	89	88
Priority	Avid Adventurists	5%	8%	15%	15%	7%	
	Active Social Families	11%	17%	6%	12%	3%	
	Family Focused Relaxers	7%	8%	15%	21%	11%	
Low Priority	Leisure Time Enjoyers	31%	13%	26%	29%	50%	
	Lukewarm Occasionalists	17%	29%	19%	7%	15%	
	Uncommitteds	29%	26%	19%	16%	14%	

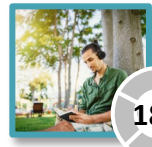
Green = over index vs Total; Red = under index vs Total
 "Max Potential" is made up of % Avid Adventurists, Active Social Families, and Family Focused Relaxers.

Opportunity for re-engagement exists for all Personas, though **some are more viable than others.**

	 18% AN ENTHUSIASTIC BUDDY	 23% MORE INTEREST	 20% AFFORDABLE ACCESS	 20% MORE ADRENALINE	 20% GEOGRAPHICAL SUPPORT
Priority	Secondary	Low	Primary	Primary	Secondary
Max Potential Reach	Medium-Low ●	Medium-Low ●	Medium-High ●	High ●	Medium ●
Estimated # of Days	Few ●	Some ●	More ●	Some ●	Most ●
Presence of Anglers or Boaters					
Outdoor Segments	Leisure Time Enjoyers Uncommitteds	Lukewarm Occasionalists Uncommitteds Active Social Families *	Leisure Time Enjoyers Avid Adventurists * Family Focused Relaxers *	Family Focused Relaxers * Avid Adventurists * Active Social Families *	Leisure Time Enjoyers
Skill Level with Activity	Beginner	Intermediate	Beginner/Intermediate	Beginner/Intermediate	Beginner/Intermediate
Addressable Headwinds	Yes Don't have anyone to go with, didn't feel rewarding, didn't feel safe, not good at it, didn't have anyone to teach	No Health, wanted to stay closer to home, didn't feel safe, too expensive, animal harm, self-conscious	Yes Don't have access to equipment needed, equipment too expensive, don't have anyone to go with, upkeep difficult	Yes Prioritized more physical activities, wanted to do something more exciting/thrilling, want something more physically/mentally challenging	Yes Wanted to stay closer to home, don't have anyone to go with, have to travel too far, don't know where to do this near them

*Asterisks indicate consumer segments contributing to "Max Potential": Avid Adventurists, Active Social Families, and Family Focused Relaxers.

Given their unique needs and experiences, and considering their personal goals and mindsets, **the industry can tailor strategies and messaging to most Lapsed Participants.**



AN ENTHUSIASTIC BUDDY



MORE INTEREST



AFFORDABLE ACCESS



MORE ADRENALINE



GEOGRAPHICAL SUPPORT

Priority	Secondary	Low	Primary	Primary	Secondary
Recommended Strategies	<ul style="list-style-type: none"> Lean into Socialization & Identity Expansion to help Lapsed continue to see themselves as ready & able 	<ul style="list-style-type: none"> Focus on Goal and Routine integration to attract the Active Social Families within this persona 	<ul style="list-style-type: none"> Lean into 'Second First Chances' and be considerate of current personal context, goals, and needs – especially financially 	<ul style="list-style-type: none"> Marry Socialization needs and Goals of Adrenaline by demonstrating how to piggyback fishing/boating with high-adrenaline activities or provide more energetic suggestions 	<ul style="list-style-type: none"> Lean into Socialization & Second First Chances to educate on new local resources & like-minded others.
Identity Overlap	No Overlap	Some	Some	Little	Some
Top Personal Goals	Read more books , travel the US more, learn something new	Spend more time with loved ones, travel the US more, exercise more	Spend more time outdoors , spend more time with loved ones, travel the US more	Exercise more , spend more time with loved ones, spend more time outdoors	Spend more time outdoors , spend more time with loved ones, exercise more
Mindsets	Lowest productivity orientation, high preference for routine	External Locus: feels least in control of their outcomes/life	Lowest need for control, high preference for routine	Most promotion-focused and risk-seeking	Lowest propensity for risk, most prevention-focused, highest concern for safety
Support	Connection is key. Connect to experienced others & communities via tandem/social rewards. When possible, tie to current/new routine.	Lean into family bonding opportunities — emphasizing events that are simply show up & enjoy (e.g., expert is guiding event, equipment provided & gets kids setup).	Facilitate or better highlight existing shared boating models. Use reference points that highlight how “affordable” and easy these options are.	Amplify fun, challenge, exploration of a new location/off-the-beaten-path. Consider ways to gamify and tack fishing stops into hiking and biking (physical) adventures.	Make it easier for them to find local spots & then highlight all details possible of what to expect to reduce uncertainty/risk about the visit.



20

**PROFILING LAPSED
RESPONDENTS**

Affinity for the outdoors,
social identity, commitment,
and motivations & mindsets

47

HEADWINDS

Reasons for no longer fishing
or boating

52

PERSONAS

Lapsed Angler and Boater
persona understanding

78

APPENDIX

Demographics and additional
detailed slides

PROFILING LAPSED PARTICIPANTS

Overarching Understanding of Lapsed Anglers and Boaters versus those Active



Three key themes emerge that differentiate Lapsed Anglers and Boaters from Retained/Active ones:



01.

Lower Interest in Being Outdoors

Lapsed are less eager to be active outside.



02.

Lack of a Shared & Social Identity

Lapsed don't see themselves as Anglers or Boaters and are less likely to share in the activity with others.



03.

Lower Commitment

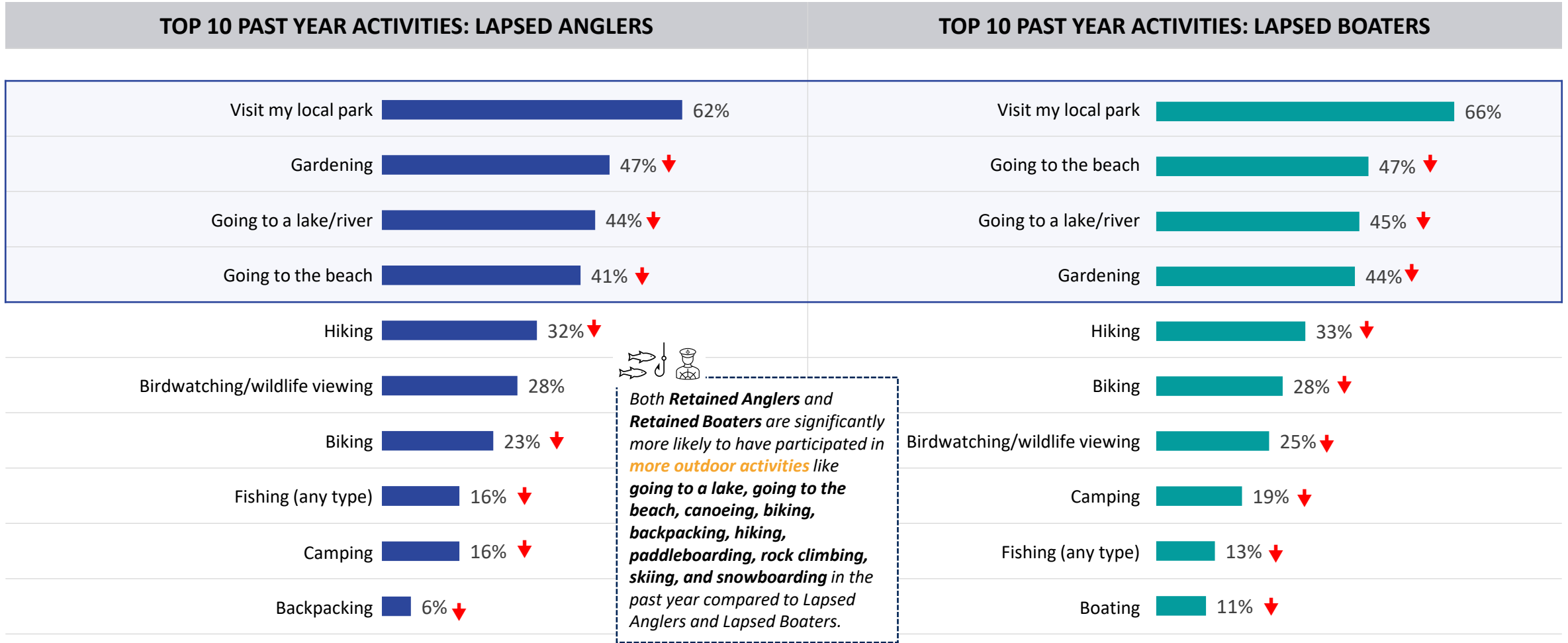
Lapsed may be more susceptible to poor first impressions and never participated as frequently.

AFFINITY FOR OUTDOORS

“Right now, at this point in my life, the only outdoor activities I enjoy participating in is taking a book out onto my patio and spending the afternoon reading. We also like packing a picnic and taking it to the local park and relaxing in our chairs by the lake for the afternoon.”

Lapsed Anglers and Boaters don't love being in/active in the outdoors as much as Active/Retained Anglers and Boaters.

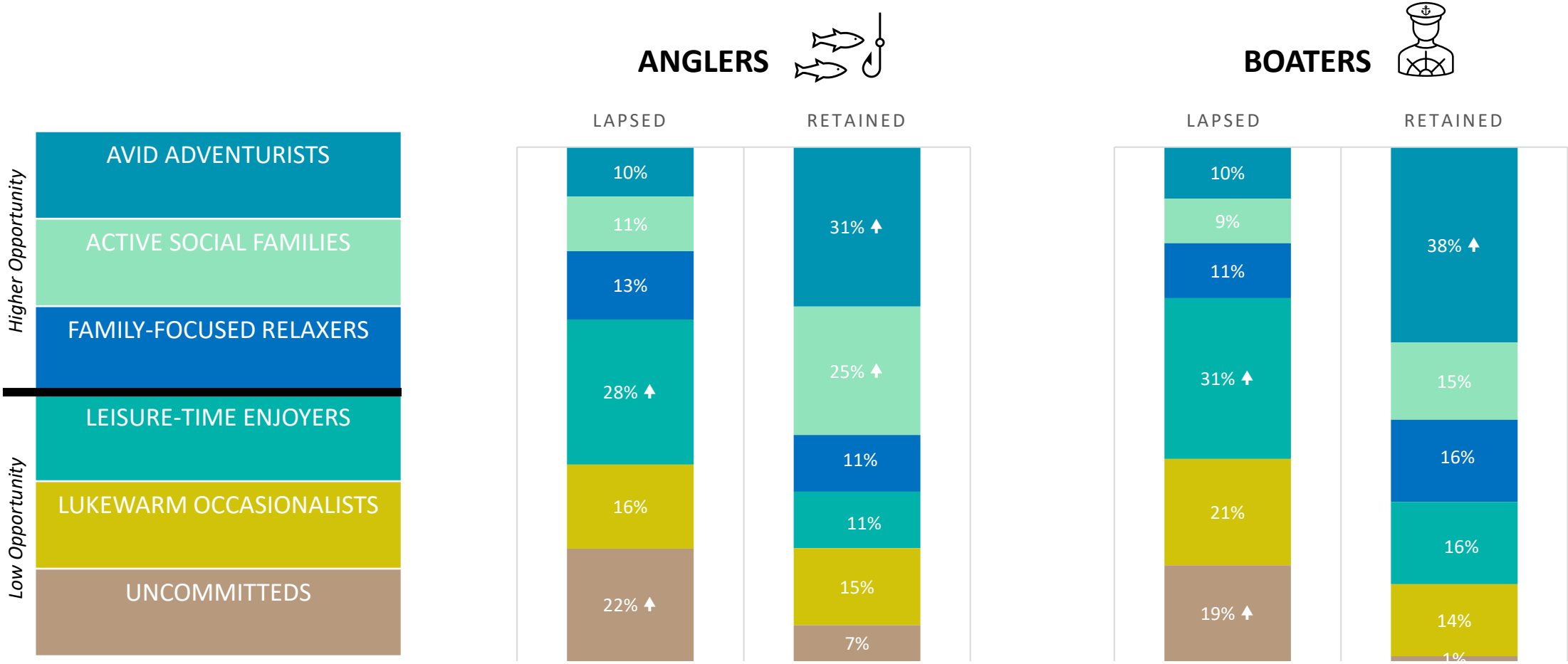
Lapsed Anglers and Boaters are participating in the same activities, **many of which are around water**. ‘Visit my local park’ comes in at #1 – another place that may offer opportunity to fish or boat. **Retained groups have participated in a greater number of outdoor activities** compared to Lapsed, suggesting a greater proclivity for the outdoors.



↓ Indicates significantly lower than Retained at 90% confidence level

Base: Total Lapsed Anglers (n=301); Total Lapsed Boaters (n=150); Top 10 activities shown.
Q2a. Which of the following outdoor activities, if any, have you participated in in the past year?

Lapsed Anglers and Lapsed Boaters alike are more likely to be **'Leisure-Time Enjoyers'** and **'Uncommitteds'** – segments with less affinity for outdoor activities. In comparison, the **Retained groups are more likely to be 'Avid Adventurists'** and **'Active Social Families'** – those who enjoy spending time being active outdoors.



↑ Indicates a significant difference vs opposite group at the 90% confidence level

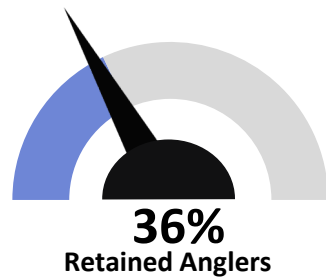
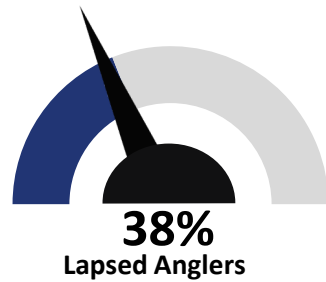
Base: Total Lapsed Anglers (n=301); Total Retained Anglers (n=100); Total Lapsed Boaters (n=150); Total Retained Boaters (n=100)
Multiple questions based on Typing Tool developed during previous research.

Although Lapsed and Retained Anglers claim to have **the same amount of free time**, the way these two groups use their free time differs.

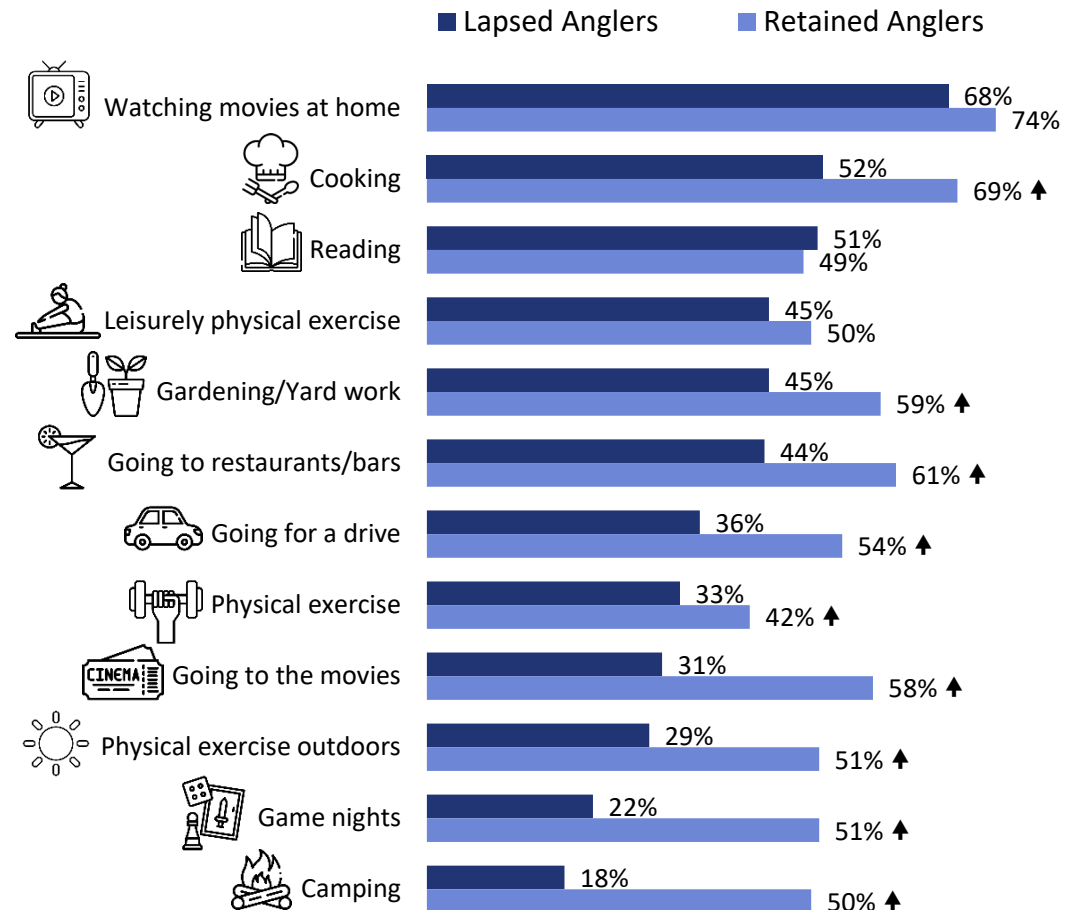
- Unsurprising, given their desire for wanting to try new things, **Retained Anglers are doing more with their free time** – both indoors and outside. Those who are **Lapsed appear to be more ‘creatures of habit’**.

SHARE OF FREE TIME

-On Average, % Of Awake Time Consists Of ‘Free Time’-



TOP 10 ACTIVITIES ENGAGE IN FREE TIME



Being busy is seen as a symbol of status, social capital, & success. Communications & product offerings can leverage “busyness” in two ways. First, retailers & resources can offer products/service/info that are specific to the “busy” consumer (e.g., beginner bundle of tackle, the quick start guide, the zero-setup setup, or easy/central catch spots in their city). Secondly, we can leverage busyness to remind them we know they are busy and how important disconnecting and other goals are to their overall happiness and success.

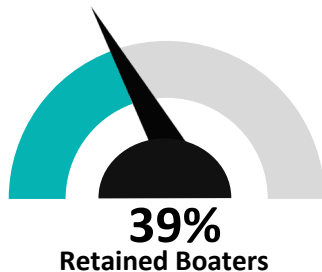
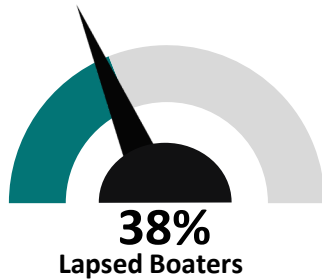
↑ Indicates a significant difference vs opposite group at the 90% confidence level
 Base: Total Lapsed Anglers (n=301); Total Retained Anglers (n=100)
 Multiple Questions: Q19, Q20

Like Anglers, both Lapsed and Retained Boaters claim to have the same amount to free time, though use it differently.

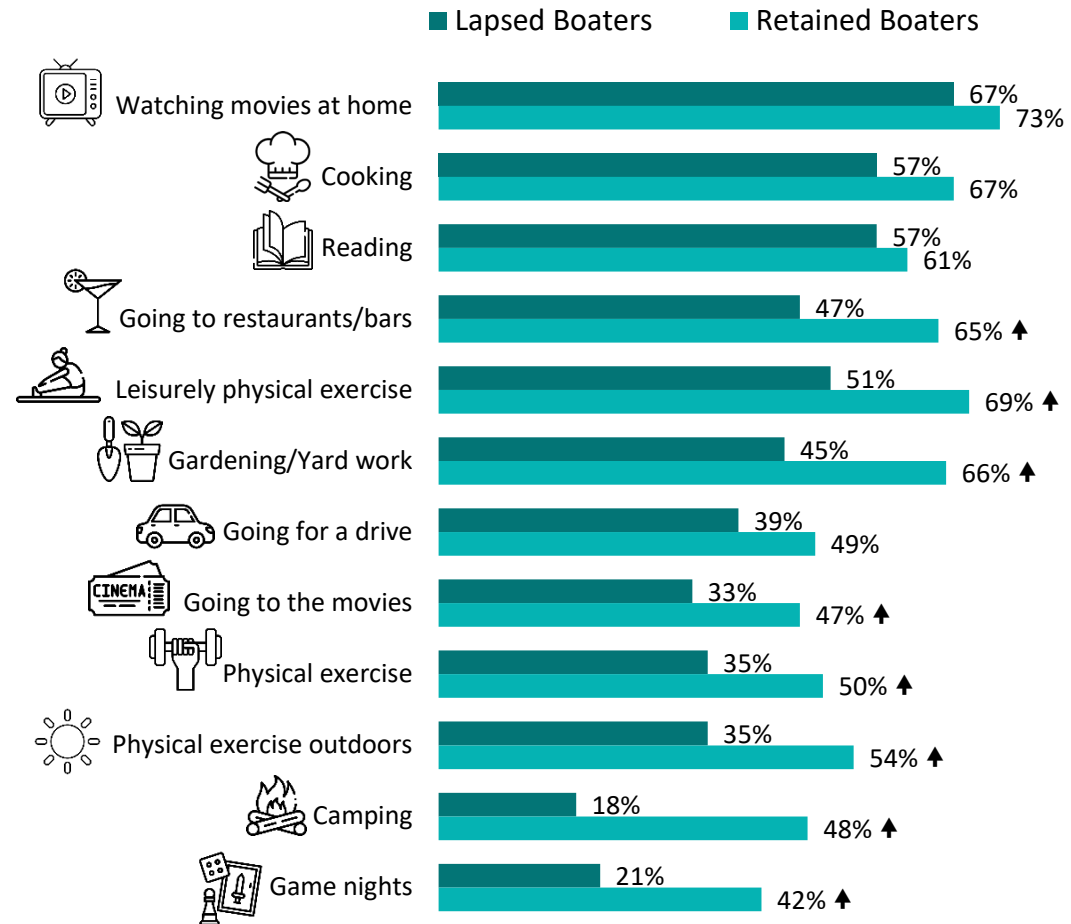
- While those who have **Lapsed** are more likely to ‘**play it safe**’ by watching movies at home, cooking, and reading, those who are **Retained** are more likely to try a variety of activities.

SHARE OF FREE TIME

-On Average, % Of Awake Time Consists Of ‘Free Time’-



TOP 10 ACTIVITIES ENGAGE IN FREE TIME



↑ Indicates a significant difference vs opposite group at the 90% confidence level

Base: Total Lapsed Boaters (n=150); Total Retained Boaters (n=100)

Multiple Questions: Q19, Q20



Given the challenge of “busy” lives & schedules, **leverage ‘Fresh Starts’ as moments of receptivity** to engage/re-engage Anglers & Boaters.

Habits begin and end at disruptive moments. The fresh-start effect refers to people viewing new beginnings as a place to consciously disrupt themselves—pursue new goals, try something new, etc.

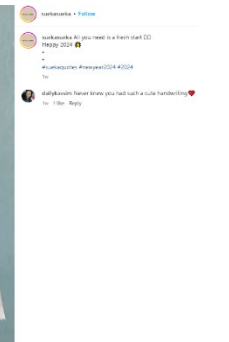
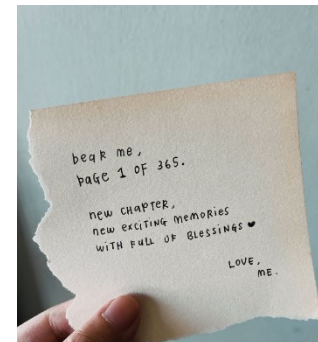
Look for fresh starts in our consumers’ lives to leverage engagement opportunities:

- Birthday
- New Year – new goals
- Graduation or meeting other big goals
- Shift in work (remote/flex) / new job/retirement
- Moving / New home – exploring area
- Milestones related to kids (age/abilities/interests)
- Big vacations as opportunities to expose/engage
- A new health diagnosis
- Start of summer/spring/school
- Start of a “fishing season”
- Buying a boat

Ipsos’ Global Trends survey (2023) reinforces that **73% of us globally wish we could “slow down.”** Use fresh starts and appeal to ‘busyness,’ as opportunities to highlight the desire/need to disconnect/reset, and how fishing/boating can offer the means.

Additionally, consider key challenges associated with “busyness”, lack of time in acting, and help to overcome:

- Simplify the process of finding suitable locations close by.
- Simplify getting started (quick start kits, zero-set-up setups) & adding it to other current activities.
- Connect them proactively with mentors or small groups (e.g., digital platforms like YouTube or Instagram may further simplify connection).



SOCIAL IDENTITY

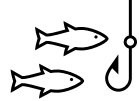
“If I had someone to go with... like I said before, I am retired and most of my neighbors also are. I grew up in a very small country town and I now live in a large city and most of the people here have never been fishing and have no desire to.”

Lapsed Anglers and Boaters are less likely to ‘see themselves’ as Anglers or Boaters and lack a strong tie to the community or nostalgic connection to the sports.

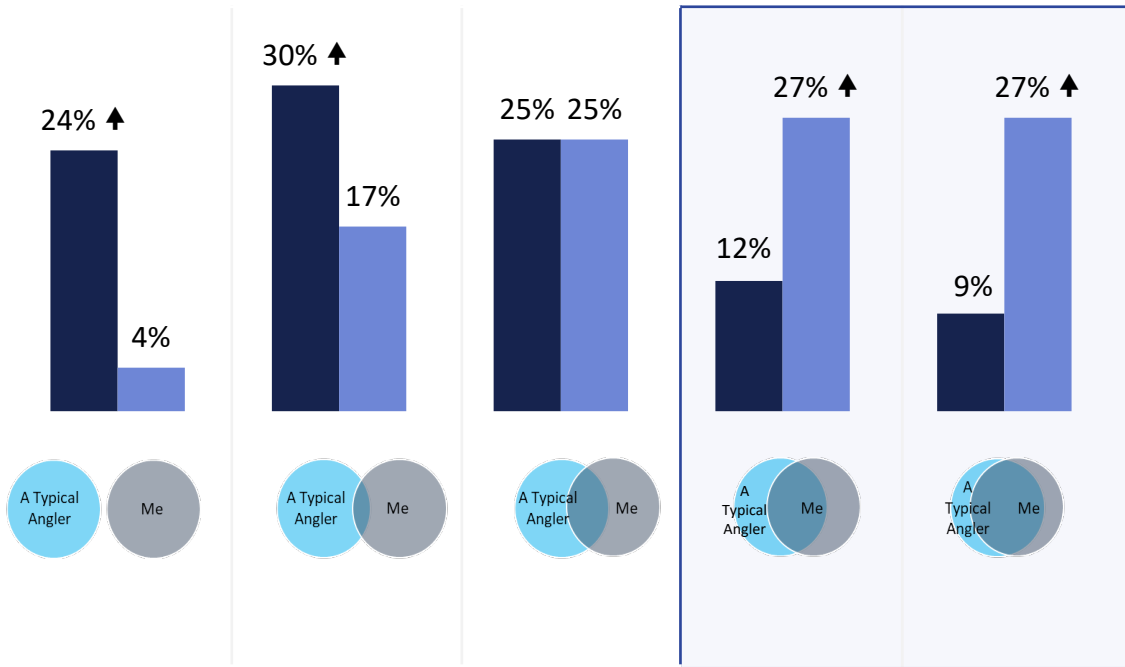
Compared to those who have Lapsed, **both Retained Anglers and Boaters view their lives and values as more in line with those of a typical Angler or Boater**, indicating there is an aspect of 'identity' that plays a role in continuing or stopping these activities. Our communications must work harder to align to a larger range of identities, goals, and values that resonate with Lapsed/likely to Lapse individuals.



VALUE OVERLAP: ANGLERS



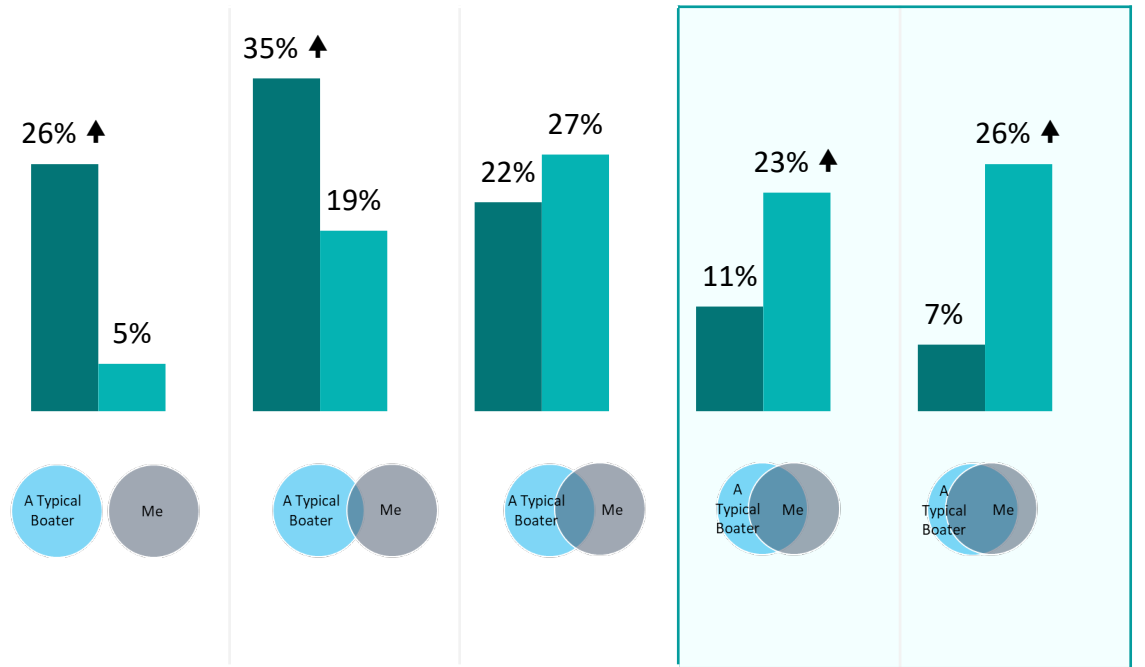
■ Lapsed Anglers ■ Retained Anglers



VALUE OVERLAP: BOATERS



■ Lapsed Boaters ■ Retained Boaters



↑ Indicates a significant difference vs opposite group at the 90% confidence level

Base: Total Lapsed Anglers (n=301); Total Retained Anglers (n=100); Total Lapsed Boaters (n=150); Total Retained Boaters (n=100)

Q12/Q13. Please select the set of circles that best describe the extent that your values & life overlap with those of a typical [angler/boater]. The more you believe the life & values of a typical [angler/boater] are like your own, the more overlapped the two circles should be and vice versa.

Ensure identity characteristics align to relevant personal and social cues for the Lapsed consumer—to nudge action and increase their satisfaction with these choices (to boat/fish).

Expand identity appeals in comms beyond typically Angler/Boater—so consumers are more likely to have the feeling that fishing/boating is “for someone like me.” One does not have to identify as a hard-core “Angler/Boater” but rather as one that:

- enjoys escaping the “busyness” of life
- simply wants to join a community of active others
- is a caring parent bonding with their kid(s)
- loves nature and the environment
- Is self-sufficient, life-long learner/adventurer

Communications should showcase these broader identities (e.g., you run the house, now ride the waves) and ensure a variety of individuals and contexts are represented across campaigns (varying age, ethnicity, gender, alone, with family—different types of families, with friends, where they fish/how, etc.). Consider contextual cues like what they are wearing, where they are coming from (e.g., after work unloading gear from trunk), who they are with, where they are (local pond) and how to align these, when possible, to relevant target audiences’ selves & contexts.

Emphasizing self-expressive choices for consumption has been shown to drive increases in choice satisfaction and loyalty.

Some respondents also noted a perceived wealth or economic status associated with boating, given the cost of owning and maintaining a boat.



Image generated by IpsosFacto AI

Algesheimer, R., Dholakia, U. M., & Herrmann, A. (2005). The social influence of brand community: Evidence from European car clubs. *Journal of marketing*, 69(3), 19-34.
 Islam, G. (2014). Social identity theory. *Journal of personality and Social Psychology*, 67(1), 741-763.
 Maimaran M, Simonson I. Multiple Routes to Self- versus Other-Expression in Consumer Choice. *Journal of Marketing Research*. 2011;48(4):755-766.
 Cheek, Nathan N., Barry Schwartz, and Eldar Shafir. "Choice Set Size Shapes Self-Expression." *Personality and Social Psychology Bulletin* (2021).
 Zhu, D., Michaelidou, N., Dewnsap, B., Cadogan, J. W., & Christofi, M. (2023). Identity expressiveness in marketing: review and future research agenda. *European Journal of Marketing*. Vol. ahead-of-print No. ahead-of-print. <https://doi.org/10.1108/EJM-08-2021-0581>
 Shankar, A., & Fitchett, J. A. (2002). Having, being and consumption. *Journal of Marketing Management*, 18(5-6), 501-516.

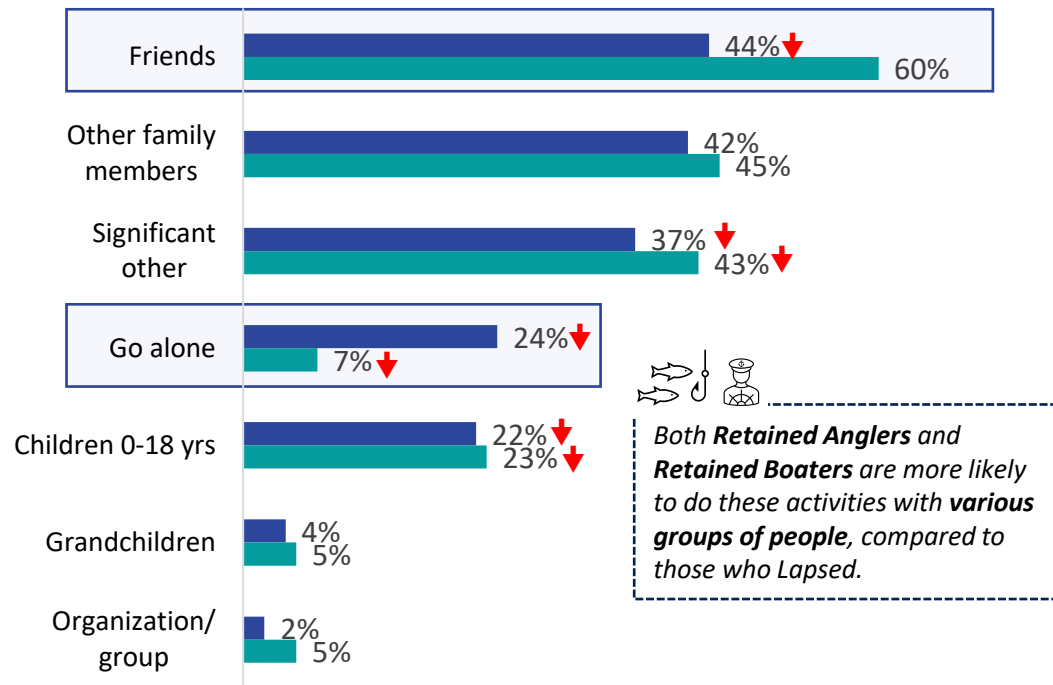
While fishing can be viewed as more of a solo sport than boating, **Lapsed Anglers are less likely to have others to go fishing with** compared to Retained Anglers. Boating, which appears to be viewed as a social activity, is more common overall with family (significant other, children).

Both activities **tend to be male-dominated**, with male adult friends and male adult family members taking the lead.

- **Most importantly, over two-thirds of those who have lapsed do not have anyone else in their household who participates in the activity.**

WITH WHOM

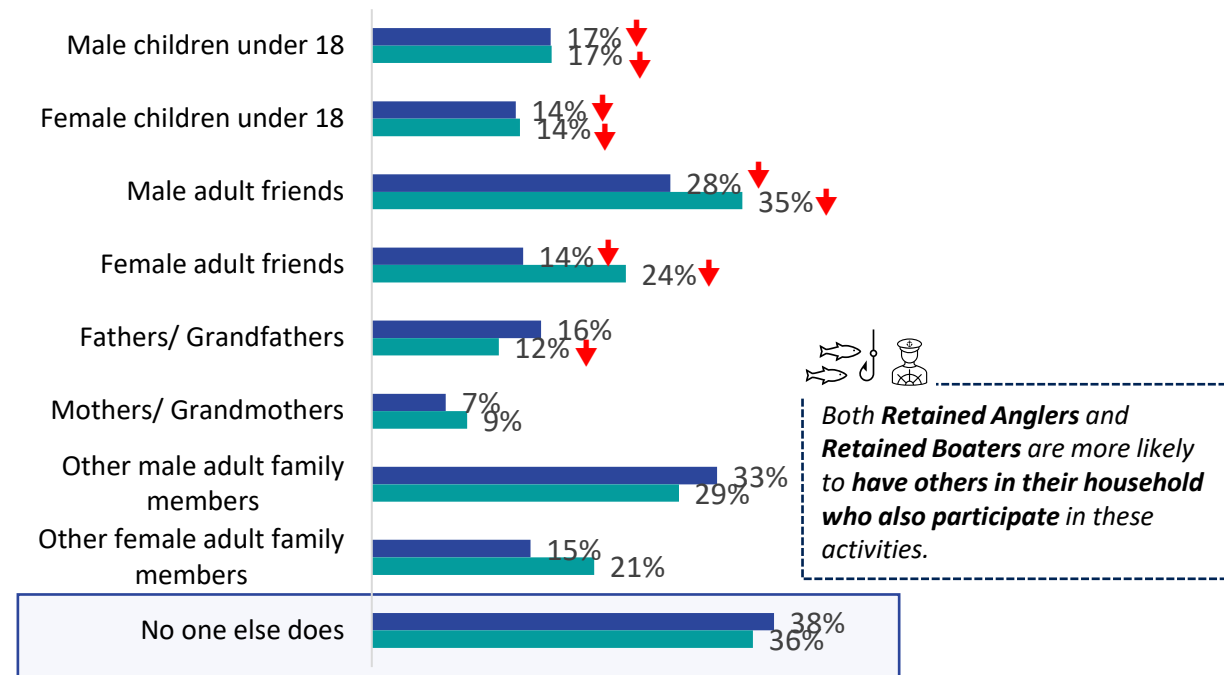
■ Lapsed Anglers ■ Lapsed Boaters



Both **Retained Anglers** and **Retained Boaters** are more likely to do these activities with **various groups of people**, compared to those who Lapsed.

OTHERS IN HOUSEHOLD

■ Lapsed Anglers ■ Lapsed Boaters



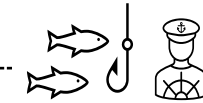
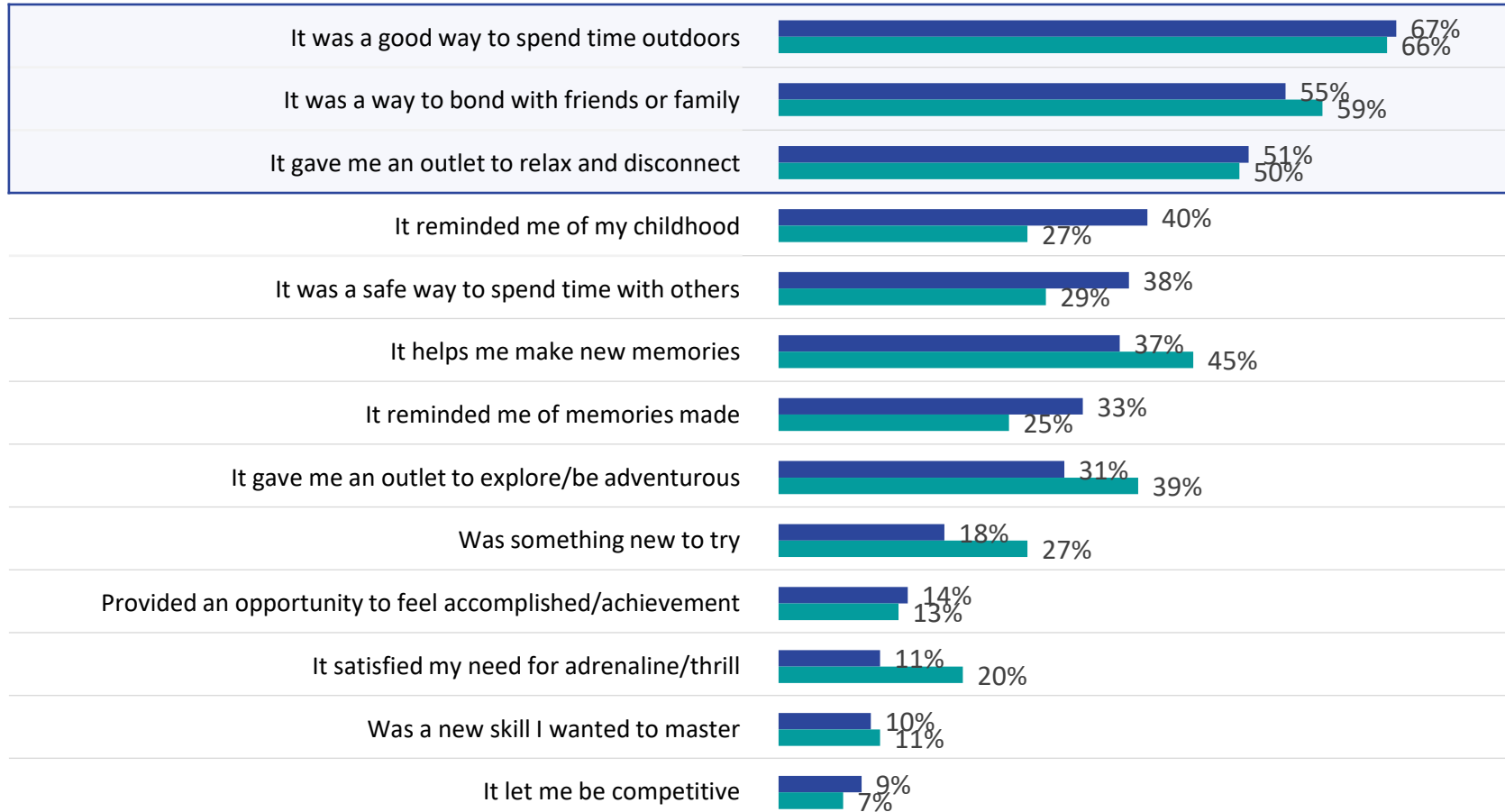
Both **Retained Anglers** and **Retained Boaters** are more likely to **have others in their household** who also participate in these activities.

↓ Indicates significantly lower than Retained at 90% confidence level
 Base: Total Lapsed Anglers (n=301); Total Lapsed Boaters (n=150)
 Q7. When you do the following activities, who would you typically do each with?
 Q8. Do others in your household or circle participate in the following activities?

Lapsed Anglers and Boaters don't have the nostalgic connection to fishing or boating as those who are currently active. Across both Lapsed Anglers and Lapsed Boaters, top reasons for participating in these activities include being a **good way to spend time outdoors**, a **good bonding opportunity** with friends or family, and an **outlet to relax and disconnect** from life; however, a **strong link to past memories may not be present, suggesting potential opportunity for forward-looking nostalgia.**

REASONS FOR FISHING AND BOATING

■ Lapsed Anglers ■ Lapsed Boaters



Both **Retained Anglers** and **Retained Boaters** are more likely to participate for **nostalgic reasons**: it reminded them of their childhood, it helps them make new memories, and it reminded them of memories made.

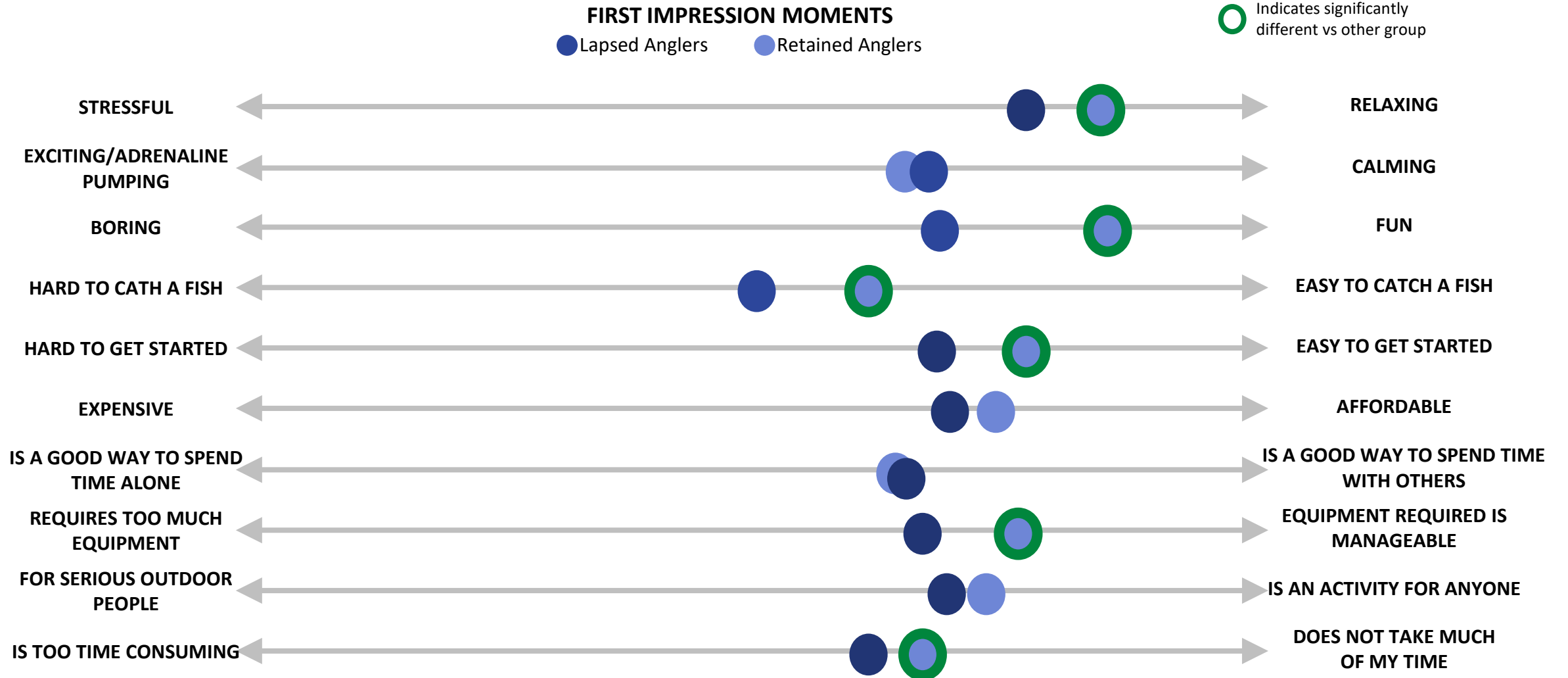
This suggests that they either had a link to tether them to the activity or were able to make an emotional connection.

COMMITMENT

“My first impression was that it looked like a lot of work.”

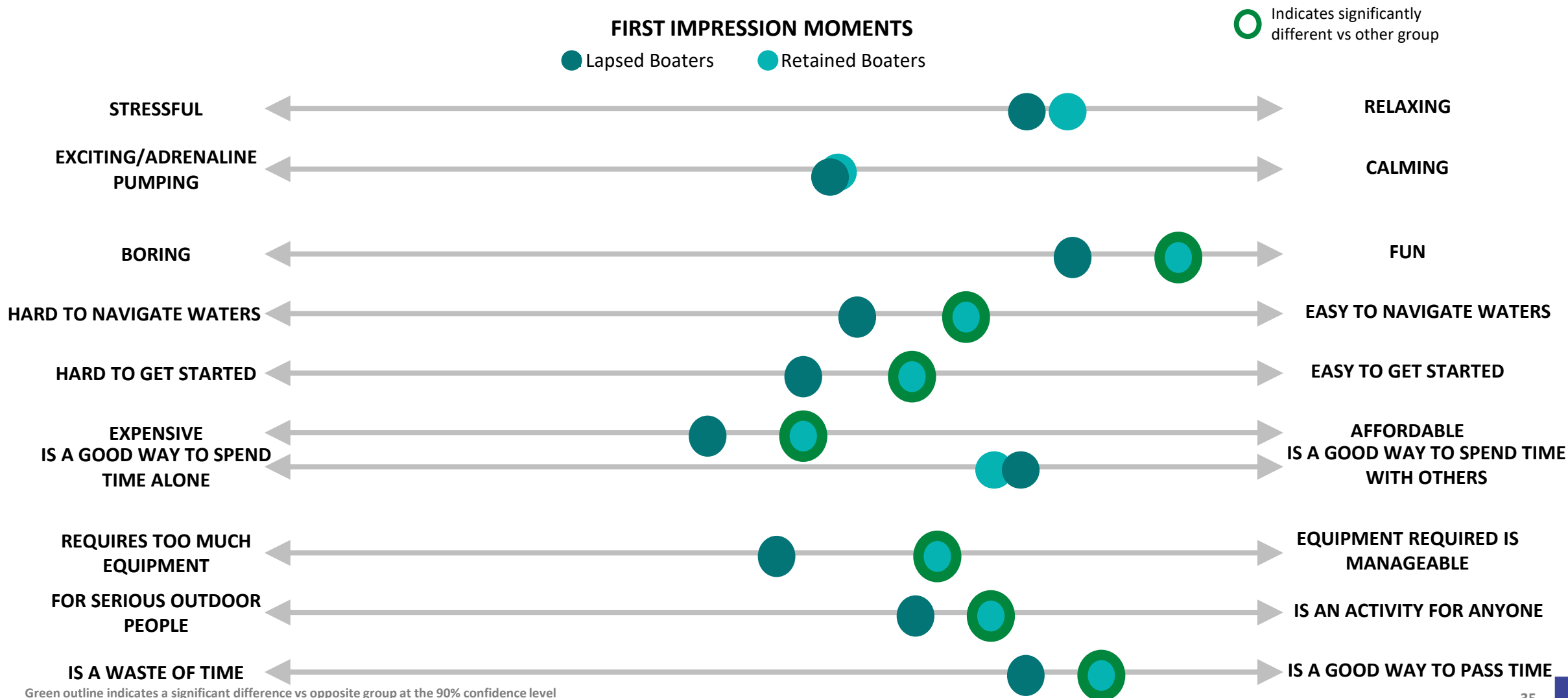
Lapsed Anglers and Boaters demonstrate less commitment to the sports early on, and first impressions suggest there was more to be desired. Initial frustrations or poor experiences may have hindered their esteem to try again.

While Lapsed Anglers' first impressions of fishing aren't all bad, it is clear that **Retained Anglers have more positive memories.** Those who have Lapsed found it less fun, less relaxing, requiring too much equipment, time consuming, and hard to catch a fish.



Green outline indicates a significant difference vs opposite group at the 90% confidence level
 Base: Total Lapsed Anglers (n=301); Total Retained Anglers (n=100)
 Q11a. Think back to the very first time you participated in fishing. What was your first impression?

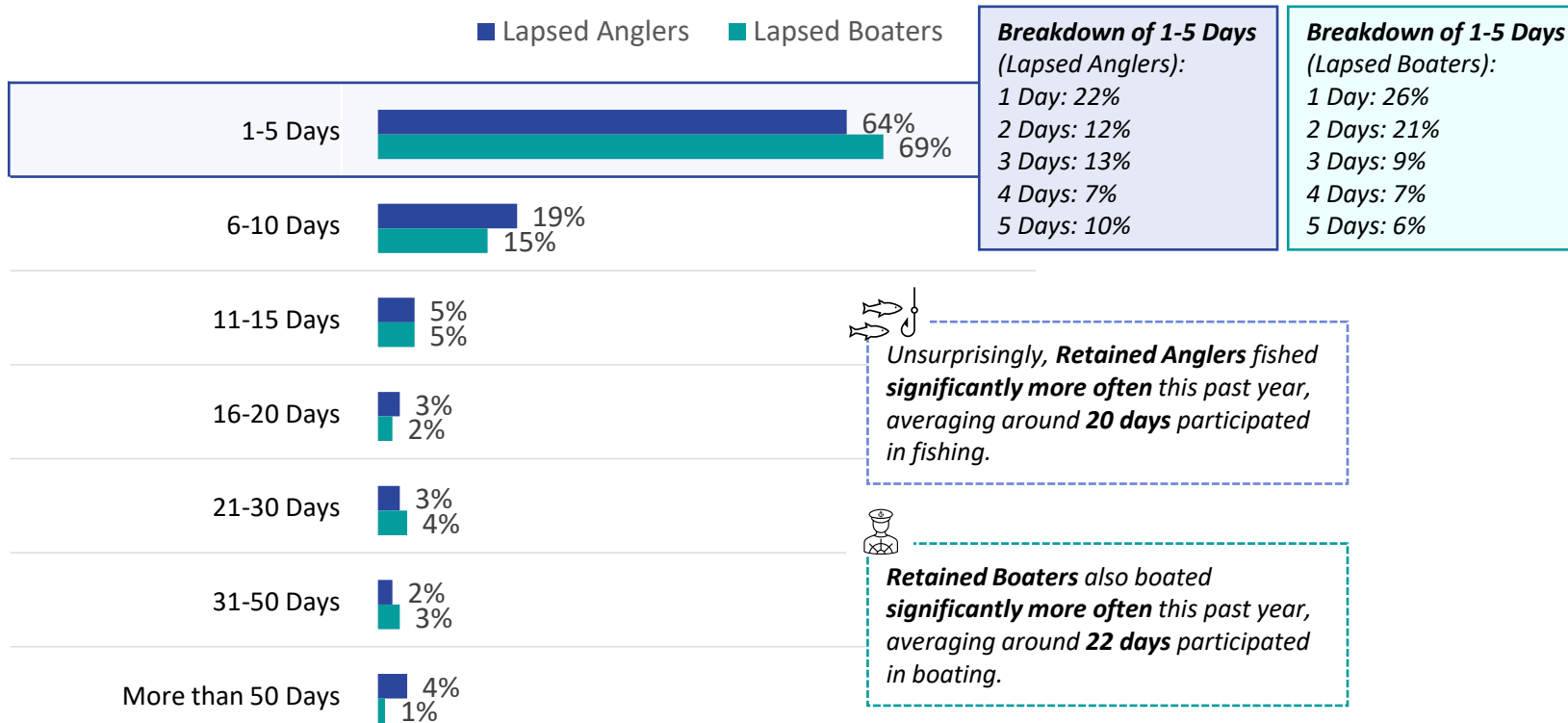
Similar to Anglers, Retained Boaters look back on their first impression moments with boating in a **more positive light** vs. those who have Lapsed. **Lapsed appear more impacted by difficulty navigating the waters, difficulty getting started, and the expense of equipment** – all of which are potential hurdles and reasons why they did not continue boating.



Green outline indicates a significant difference vs opposite group at the 90% confidence level
 Total Lapsed Boaters (n=150); Total Retained Boaters (n=100)
 Q11a. Think back to the very first time you participated in fishing. What was your first impression?

Prior to being lapsed, Lapsed Anglers and Boaters were neither avid nor passionate about the activity, as indicated by their infrequent participation. It is key to make a positive, lasting impression early on, given many are only giving fishing and boating a handful of tries before quitting.

FISHING AND BOATING PREVIOUS FREQUENCY



Average # of Days Per Year Participated in Fishing



Average # of Days Per Year Participated in Boating

Unsurprisingly, **Retained Anglers** fished significantly more often this past year, averaging around **20 days** participated in fishing.

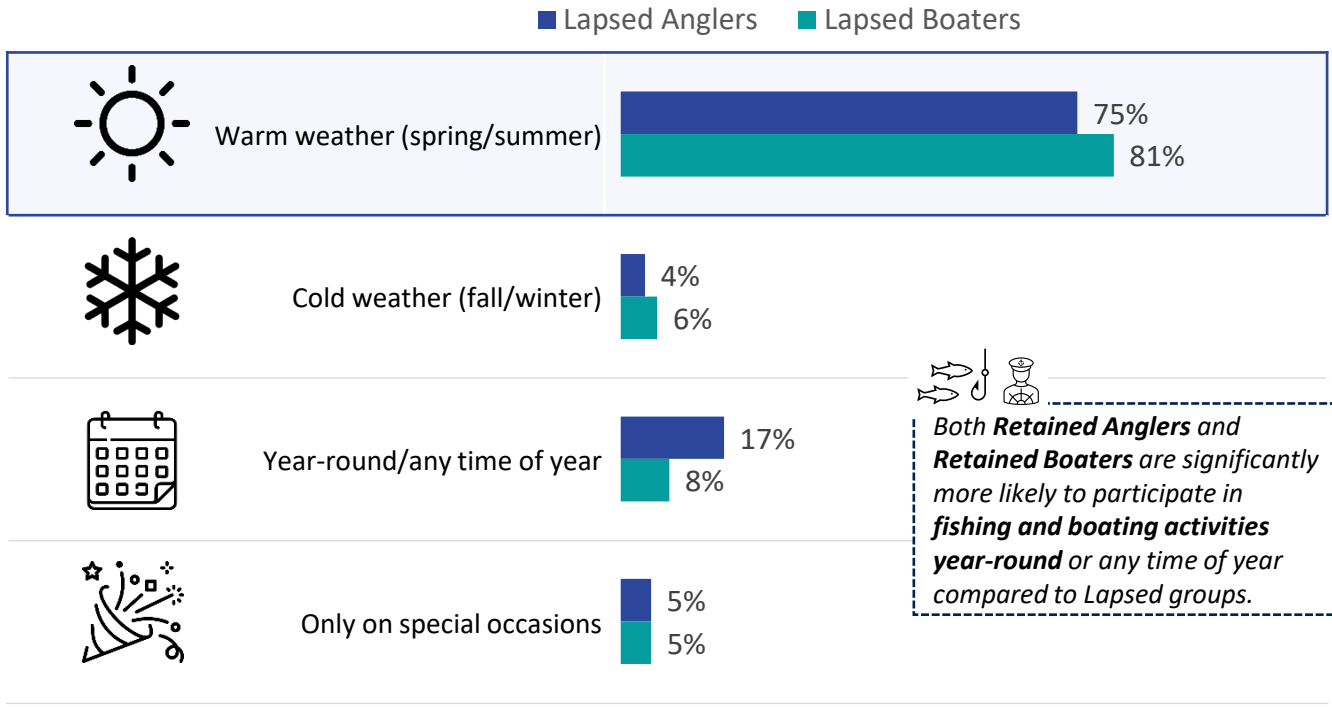
Retained Boaters also boated significantly more often this past year, averaging around **22 days** participated in boating.

Base: Total Lapsed Anglers (n=301); Total Lapsed Boaters (n=150)
 Q4. How many days in an average year did you or did you used to participate in the following activities?

Lapsed Anglers and Boaters were fair-weather participants, mainly participating in these activities in the spring or summer, whereas **Retained groups** are more likely to participate in **fishing and boating year-round**.

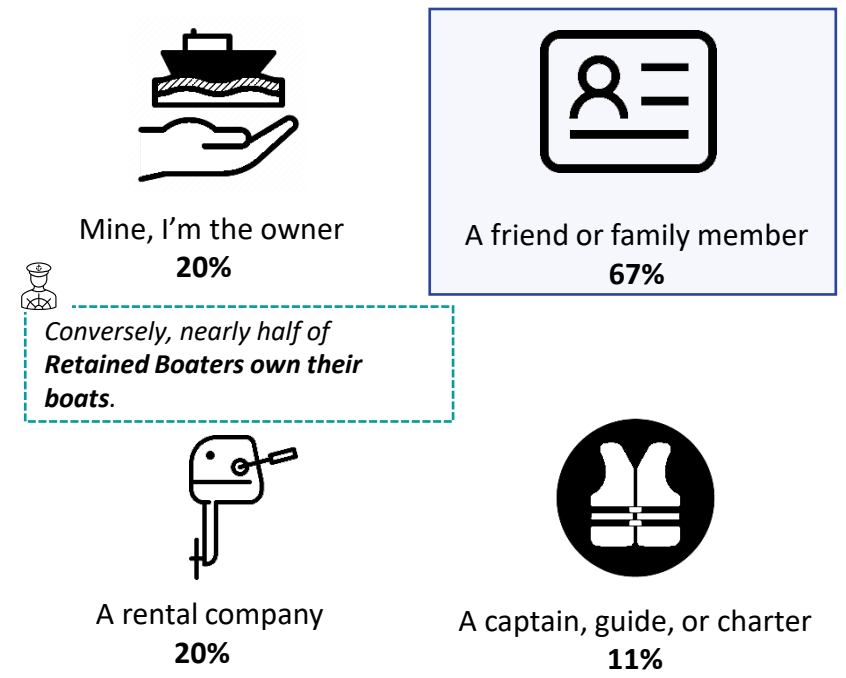
Additionally, boat access is a critical barrier with nearly two-thirds of Lapsed Boaters having **borrowed a boat from a friend or family member** to do boating activities.

FISHING AND BOATING TIME OF YEAR



WHOSE BOAT

Among Lapsed Boaters



Base: Total Lapsed Anglers (n=301); Total Lapsed Boaters (n=150)
 Q6. During what times of the year do you/did you go...?
 Q5. When you were boating, whose boat was it?

DEEP DIVE: MOTIVATIONS & MINDSETS



We examine several behavioral science frameworks to provide a deeper understanding of consumer motivations, goals, and mindsets, which will **allow for activation rooted in consumer behavior.**

We included several academically validated measures to distinguish nonconscious motivations that define consumers at an overall ‘trait-level,’ as well as contextual needs that drive attitudes when choosing how to spend their free time on activities. By quantifying these motivations and aligning them to how we communicate and frame up our activities (fishing/boating)— we ensure they are ultimately more noticed, relevant, and desirable.

GENERAL CONSUMERS MINDSETS | **MINDSETS IN THE CONTEXT OF FREE TIME ACTIVITIES**



PRODUCTIVITY ORIENTATION

Do I strive to always use my time “productively?”



PROPENSITY FOR RISK

Do I like trying new things or prefer to stick to familiar?



VARIETY SEEKING IN LIFE/ ROUTINE

Am I a creature of habit or do I like to “change it up?”



PROMOTION VS. PREVENTION FOCUS

Do I choose activities that enhance my life vs. relieve stress/negative?



SELF VS. OTHER REWARDS

Do I choose activities that prioritize myself vs. others?



LOCOMOTION REWARDS

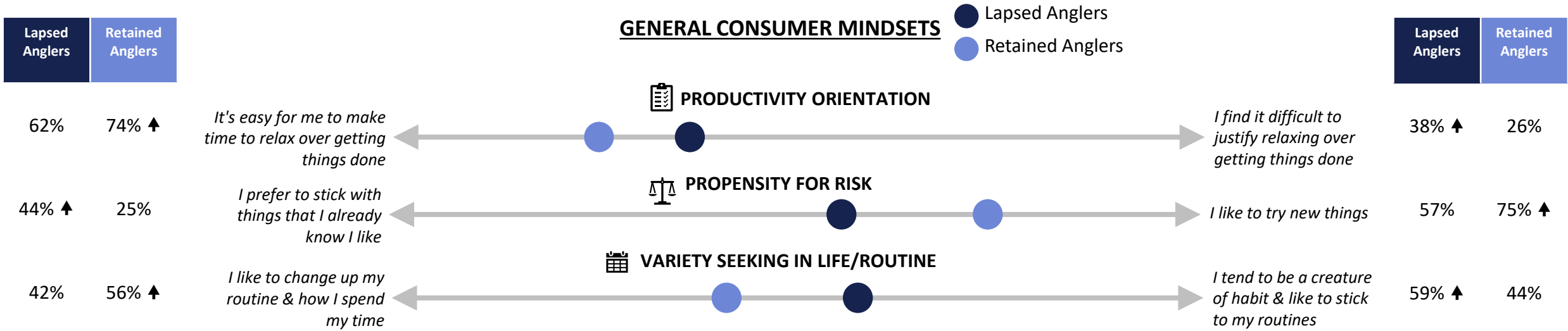
Do I choose activities that help me take a pause or get me moving?

Aligning to mindsets = “Fit Effect”

A deeper understanding of how and why people choose the way they do enables us to design communications that more intuitively resonate and engage consumers.

Haws, K. L., & Poynor, C. (2008). Seize the day! Encouraging indulgence for the hyperopic consumer. *Journal of Consumer Research*, 35(4), 680-691.
 Keinan, A., & Kivetz, R. (2011). Productivity orientation and the consumption of collectable experiences. *Journal of consumer research*, 37(6), 935-950.
 Kruglanski, A. W., Thompson, E. P., Higgins, E. T., Atash, M. N., Pierro, A., Shah, J. Y., & Spiegel, S. (2018). To “do the right thing” or to “just do it”: Locomotion and assessment as distinct self-regulatory imperatives. In *The Motivated Mind* (pp. 299-343). Routledge.
 Higgins, E. T. (1998). Promotion and prevention: Regulatory focus as a motivational principle. In *Advances in experimental social psychology* (Vol. 30, pp. 1-46). Academic Press.
 Zhang, D. C., Highhouse, S., & Nye, C. D. (2018). Development and validation of the general risk taking propensity scale (GRIPS). *Journal of Behavioral and Decision Making*.
 Rook, D. W. (1985). The ritual dimension of consumer behavior. *Journal of consumer research*, 12(3), 251-264.
 Polman, E. (2012). Effects of self–other decision making on regulatory focus and choice overload. *Journal of personality and social psychology*, 102(5), 980.

Compared to those who have Lapsed, **Retained Anglers find it easier to make time to relax, enjoy trying new things, and like to change up their routine.**



HOW TO ACTIVATE

Consider meeting Lapsed Anglers where they are at; communicate ways in which fishing is “productive” (i.e., mental health, get outdoors & disconnect, family bonding, etc.)—tie to stated goals for these individuals.



Given their lower risk & variety seeking, lean into the **guarantees of fishing**: “fresh air”, a break, and bonding. This may also be a reason to use **piggybacking**—tie to other routine parts of their lives (vs. as something completely new or separate to take on). For example, they might already like audiobooks or podcasts; they could do this while fishing in their local park.

Many already visit their local park—promote fishing as something to do while there.

Free Fishing in State Parks



Texas State Parks are proud to host “Free Fishing in State Parks,” a year-round program to encourage spending time enjoying one of America’s greatest pastimes. Fish without fishing license or stamps in Texas state parks. Just bring your fishing gear and friends to a state park, pay the entry fee, and you’re ready to fish!



Parks With Loaner Equipment

If you don't have any fishing gear, don't worry. Many state parks loan fishing equipment for use in the park! Check the list of parks with loaner equipment, or call the parks directly.

↑ Indicates a significant difference vs opposite group at the 90% confidence level

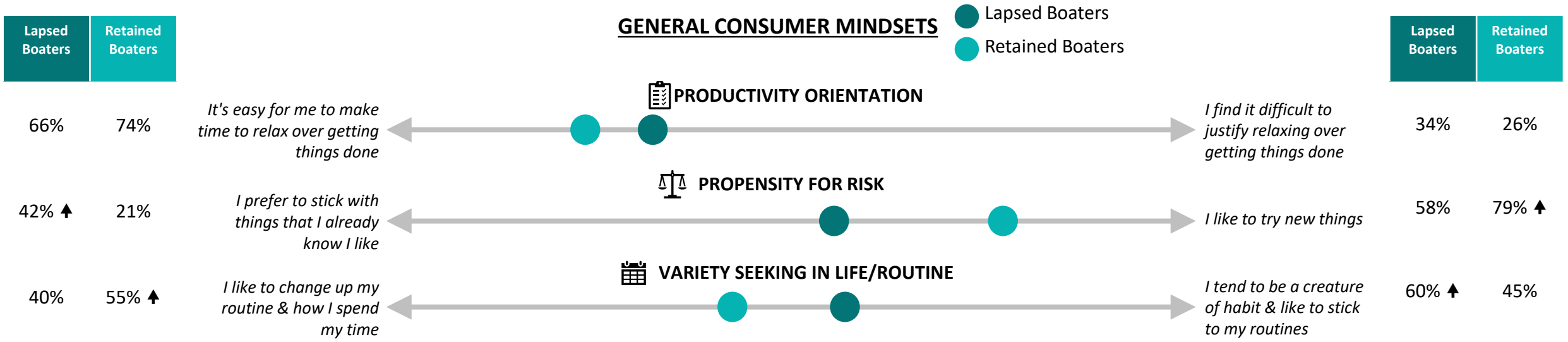
Base: Total Lapsed Anglers (n=301); Total Retained Anglers (n=100)

Q17. Now we'd like to ask you about your general approach to life. You will be shown a set of paired statements. For each pair, please select the one that best describes how you generally approach life.

Hollingsworth, C., & Barker, L. (2020). The Behavioural Science Guide to Making and Breaking Habits.

Rothman, A. J., Gollwitzer, P. M., Grant, A. M., Neal, D. T., Sheeran, P., & Wood, W. (2015). Hale and hearty policies: How psychological science can create and maintain healthy habits. Perspectives on Psychological Science, 10(6), 701-705

Compared to those who have Lapsed, Retained Boaters also **express more interest in trying new things and changing up their routine.**



HOW TO ACTIVATE

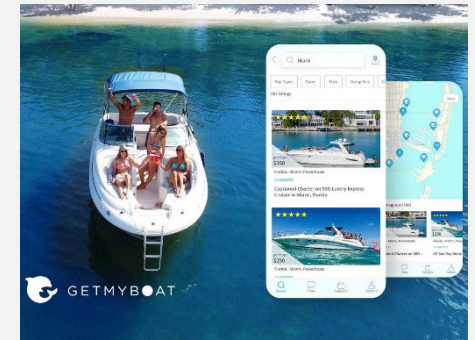
Consider meeting Lapsed Boaters where they are at; communicate ways in which boating is “productive” (i.e., mental health, get outdoors & disconnect, family bonding, explore, make new memories, etc.)—tie to goals for these individuals.



From Yamaha

Given their lower risk & variety seeking, lean into the **guarantees of boating**: “fresh air“, a break, fun/exploration, & bonding. This may also be a reason to use **piggybacking**—tie to other routine parts of their life (vs. as something completely new or separate to take on).

Many already visit their local park, beaches, & lakes—make it clear they can do boating to amplify those activities & make it easier to do so.



↑ Indicates a significant difference vs opposite group at the 90% confidence level

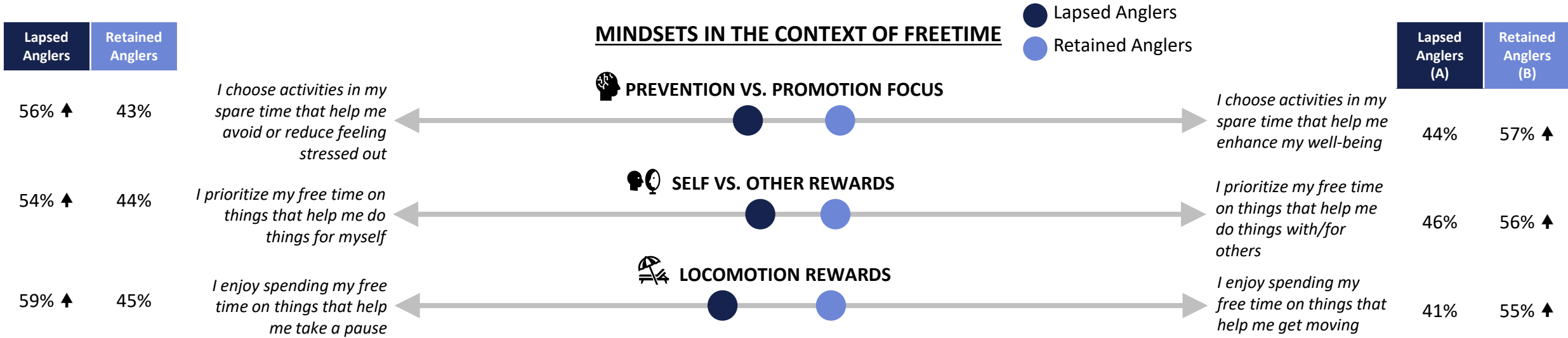
Base: Total Lapsed Boaters (n=150); Total Retained Boaters (n=100)

Q17. Now we'd like to ask you about your general approach to life. You will be shown a set of paired statements. For each pair, please select the one that best describes how you generally approach life.

Hollingsworth, C., & Barker, L. (2020). The Behavioural Science Guide to Making and Breaking Habits. |

Rothman, A. J., Gollwitzer, P. M., Grant, A. M., Neal, D. T., Sheeran, P., & Wood, W. (2015). Hale and hearty policies: How psychological science can create and maintain healthy habits. Perspectives on Psychological Science, 10(6), 701-705

Compared to those who have Lapsed, Retained Anglers approach their free-time with more of a **promotion motivational mindset**, **prioritization of others (vs. self)**, and **preference for activities that get them moving**.



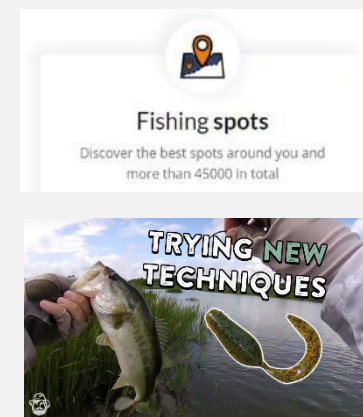
HOW TO ACTIVATE

Prevention-focused individuals are motivated by things that help them take care of the responsibilities and avoid negatives. Keeping this in mind, along with the fact that some may struggle to let go of “being productive,” **let’s help them frame taking a pause as a productive endeavor** to be...more patient, a better employee, a refreshed parent, etc.

In addition, consider how fishing helps them both take care of themselves and others. It can be the best of both worlds, or they can “choose your own” purpose of your adventure/trip.



Finding focus here, Lets you focus there.



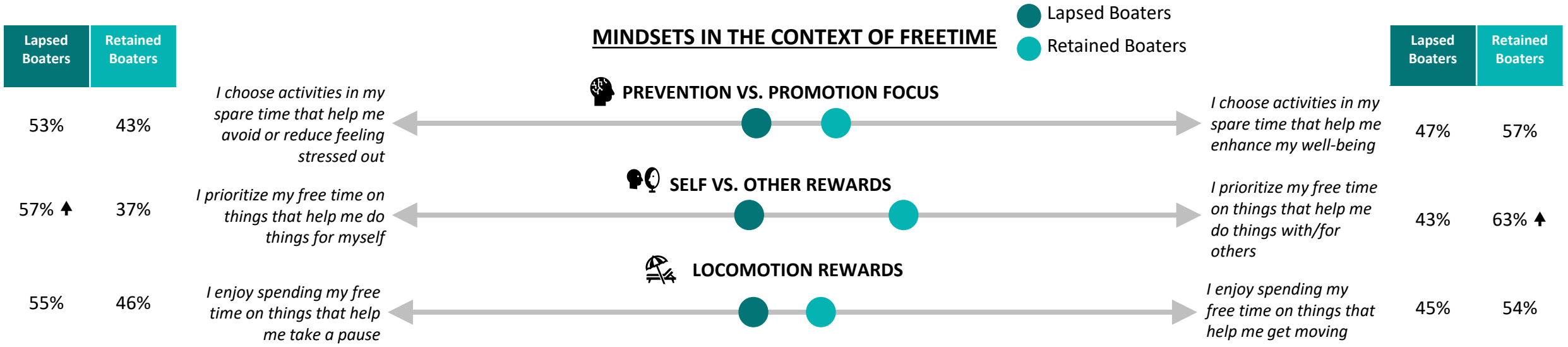
Consider ways to add “novelty” to a current activity/routine—this can help increase feelings of productivity without feeling “risky” (e.g., try a new bait, a new location, a new technique or seasonal specific approach).

↑ Indicates a significant difference vs opposite group at the 90% confidence level

Base: Total Lapsed Anglers (n=301); Total Retained Anglers (n=100)

Q18. Next, we'd like to ask you about how you use your free time. You will be shown a set of paired statements. For each pair, please select the one that best describes how you generally approach spending your time.

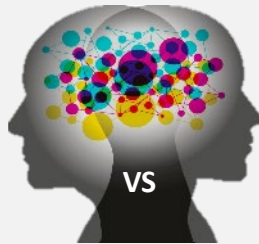
Compared to those who have Lapsed, Retained Boaters approach their free-time with more of a **promotion motivational mindset and prioritization of others (vs. self).**



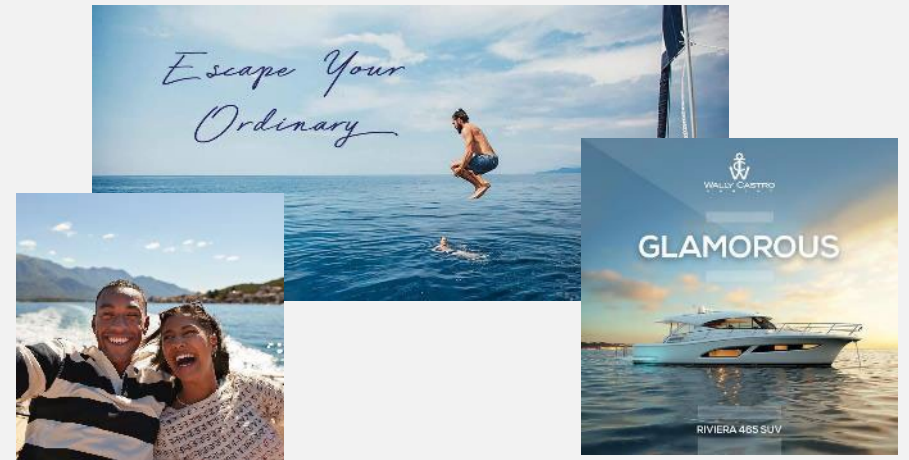
HOW TO ACTIVATE

Lapsed Boaters are a bit more of a mix, when it comes to what they want from their free time activities. Test using a mix of promotion and prevention framed messages and ones that emphasize both the exploration/adventure AND relaxation/escape of the boat. Keep in mind they do tend to skew more “me” focused—but that “me” focus does not necessarily mean others are not present (e.g., one might be motivated to buy a boat to convey to others they are adventurous or successful).

Promotion Focus: on the successes, rewards, and achievements/opportunities the activity will bring



Prevention Focus: on how activity helps take care of obligations, reduce stress/concerns, and avoid negatives



↑ Indicates a significant difference vs opposite group at the 90% confidence level

Base: Total Lapsed Boaters (n=150); Total Retained Boaters (n=100)

Q18. Next, we'd like to ask you about how you use your free time. You will be shown a set of paired statements. For each pair, please select the one that best describes how you generally approach spending your time.



In addition to aligning to key mindsets, we can further amplify the stopping power and perceived relevance of our touchpoints by leveraging the power of goal-directed attention.

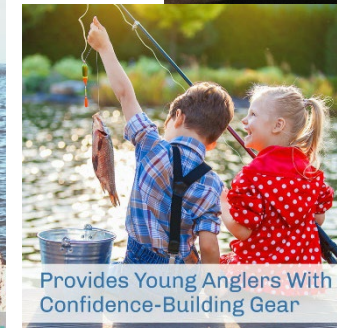
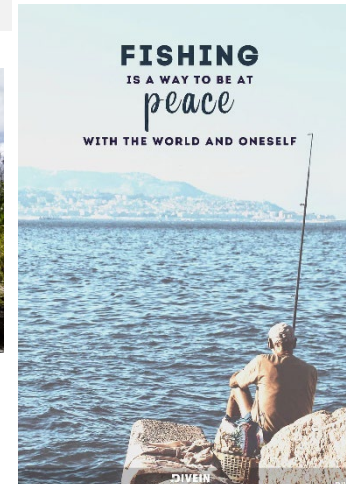
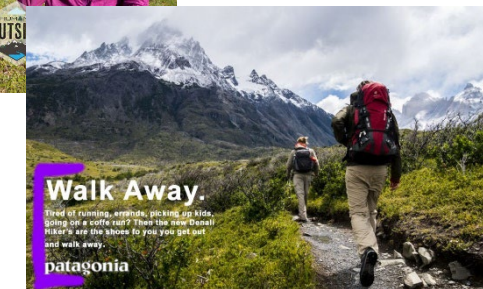
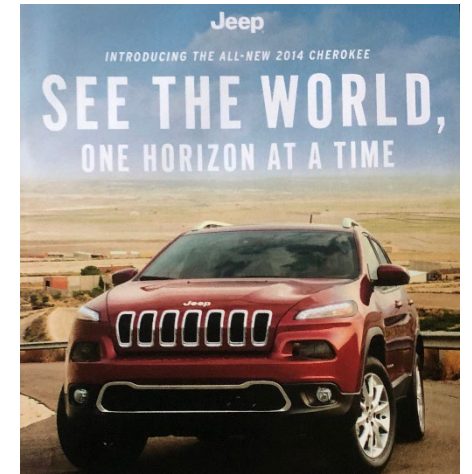
Our goals dictate our attention and evaluations. Consumers perceive and pay more attention to items in the environment that help achieve their goals – they may even be “blind” to elements that are not related to the current goal. Knowing consumers’ goals (both functional and emotional) allows us to create messaging that is more likely gain attention and drive perceived relevance of boating/fishing to their lives.

Highlight how fishing/boating ties to the desired mental strengths & personal goals that consumers have.

For example, showcase the tie between these activities & achieving a positive mindset, mental & physical health, reducing stress, self-confidence, bonding, patience/being present, traveling/seeing the world, etc.



Tie to physical activities like hiking for fishing & tubing/skiing for boating.



Jeep Cherokee advertisement text: INTRODUCING THE ALL-NEW 2014 CHEROKEE. SEE THE WORLD, ONE HORIZON AT A TIME. FEELS FEATURING A BOLD EXTERIOR DESIGN WITH THE SMOOTH RIDE AND UP-LEVEL SPEED TRANSMISSION. WITH AVAILABLE NAPPA LEATHER-TRIMMED TO THE WORLD, BEST-IN-CLASS AWD CAPABILITY AND A 4" TOUCH SCREEN. DRIVE IS READY FOR ANY JOURNEY THAT YOU'RE READY TO BEGIN. GUILT FREE. JEP.COM/CHEROKEE

Importantly for attrition/retention, we may want to remind them of these other goals (vs. just catching fish) to increase their sense of self-determined motivation and perceived goal progress/attainment—leading to more positive affect, motivation, and higher satisfaction with their fishing/boating experiences.

There are ways to communicate **how fishing can benefit the Lapsed group’s mental and personal goals**, i.e., that spending time in nature can lead to positive physiological and mental health indicators, learning a new skill improves self-confidence, etc. Fishing can also be a way to spend more valuable time with loved ones, outdoors.

TOP 5 MENTAL STRENGTHS WANT TO BE BETTER AT

Among Lapsed and Retained Anglers

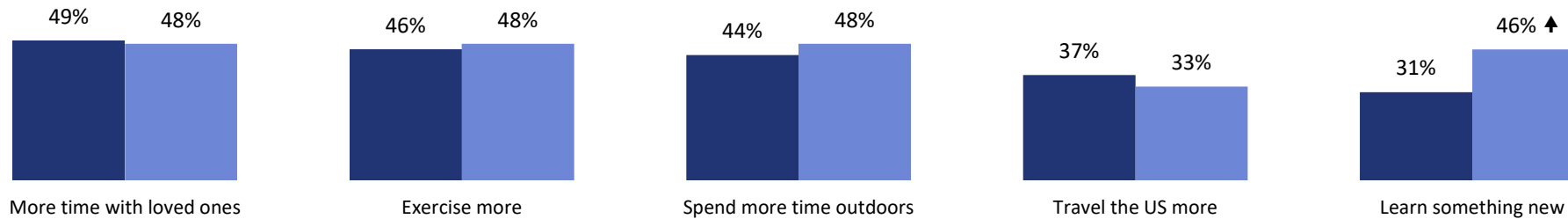


% Selected "I'm good at this"	TOP 5 MENTAL STRENGTHS WANT TO BE BETTER AT				
	Lapsed Anglers	Managing Stress	Being Confident in Myself	Being Patient	Prioritizing my Mental Health
Lapsed Anglers	48%	40%	46%	52%	47%
Retained Anglers	69% ↑	54% ↑	64% ↑	58%	58% ↑

“ Four and a half hours later I remembered why I had bought these, it wasn't to catch fish - it was to keep casting and reeling in some peace and serenity. Spoiler - I didn't catch anything but did come back feeling very relaxed” – [\(Instagram\)](#)

TOP 5 PERSONAL GOALS

■ Lapsed Anglers ■ Retained Anglers



Retained Anglers show **higher** respective self-efficacy scores compared to their Lapsed counterparts.

↑ Indicates a significant difference vs opposite group at the 90% confidence level
 Base: Total Lapsed Anglers (n=301); Total Retained Anglers (n=100)
 Multiple Questions: Q25, Q24

Similar communication-tactics can be implemented to support Lapsed Boaters’ mental and personal goals. Given over half of Lapsed Boaters have the goal of exercising more, **consider piggybacking boating with more physical water sports** like tubing, water skiing, swimming, etc.

TOP 5 MENTAL STRENGTHS WANT TO BE BETTER AT

Among Lapsed and Retained Boaters

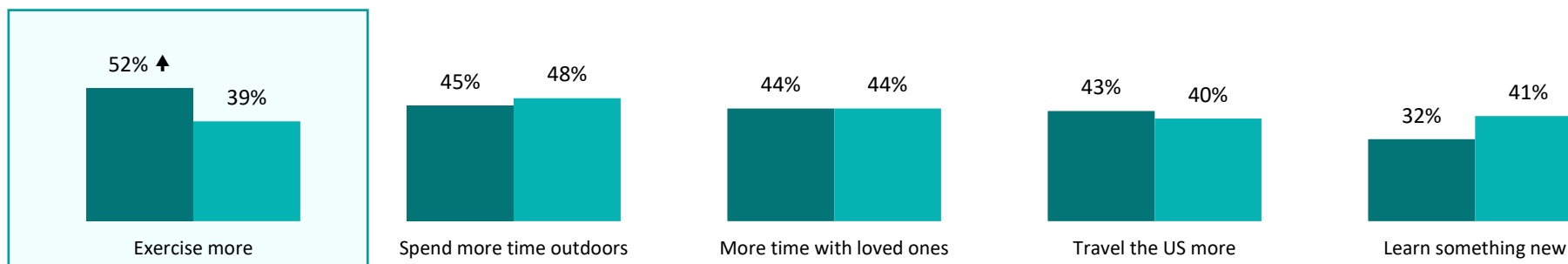


% Selected "I'm good at this"	TOP 5 MENTAL STRENGTHS WANT TO BE BETTER AT				
	Lapsed Boaters	Managing Stress	Being Patient	Being Confident in Myself	Being 'Present' and in the Moment
Lapsed Boaters	47%	44%	48%	47%	54%
Retained Boaters	70% ↑	53%	58%	63% ↑	64%

Retained Boaters show higher respective self-efficacy scores compared to their Lapsed counterparts.

TOP 5 PERSONAL GOALS

■ Lapsed Boaters ■ Retained Boaters



Nature is a powerful common thread and lever here—it is an “escape” to rest our minds & has a positive physiological impact in reducing stress (via reduced pulse rate, cortisol levels, & improved immune responses).^{1,2,3} Adopting & sticking with hobbies has dually been shown to reduce anxiety & depressive symptoms & enhance life satisfaction.^{4,5,6}

↑ Indicates a significant difference vs opposite group at the 90% confidence level
 Base: Total Lapsed Boaters (n=150); Total Retained Boaters (n=100)
 Multiple Questions: Q25, Q24

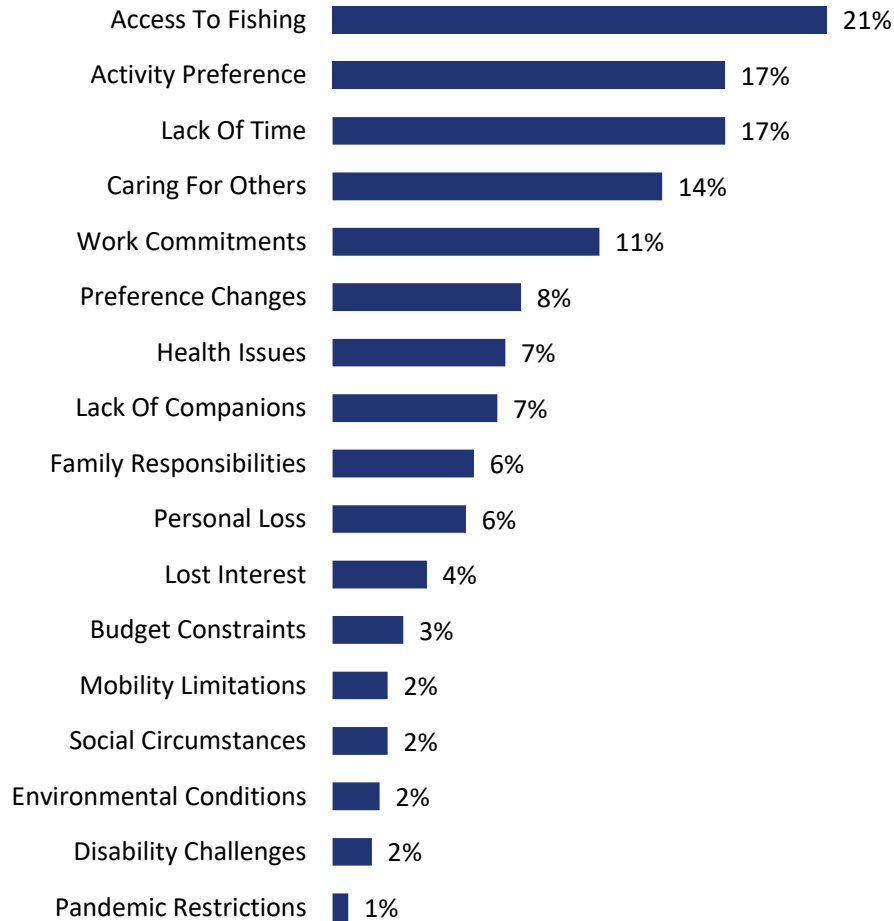
HEADWINDS

Reasons for No Longer Fishing
or Boating



When asked to identify a top-of-mind trigger moment that led Anglers to “drop the rod”, many mention key themes around **no longer having access to fishing, preference for alternative activities, lack of time, and other people/things taking priority instead.**

KEY THEMES IDENTIFIED FOR CESSATION MOMENT



Access to Fishing



I no longer live near a lake.”

I didn’t have time or **resources to do good fishing**. I really need a boat for good fishing where I live, and I don’t have a boat.”

I stopped fishing years ago because we no longer went to the resort where we fished. There really wasn’t **any other place close enough to home** where we could fish so we just didn’t do it anymore.”

Activity Preference



I’m **not a huge fan of fishing**. I’ve mainly done it with other people because they want to. I would never go out of my way to go fishing.”

We **take walks and hikes now** instead of boating and fishing.”

I did not participate last year in fishing because I was busy doing other activities with friends and family like **going to the lake, going to the beach, and snowboarding**. Other than that, I have just been really busy working and haven’t had much time.”

Lack of Time



No specific incident or replacement activity... Just **did not find time to go as life got too busy.”**

I **haven’t had the opportunity** to go lately.”

I was too busy getting my life back together and **didn’t have time** to go fishing.”

Caring for Others



My husband had **back surgery last year**, so we weren’t able to get away to fish. We didn’t do any physical activity last summer because of the pain he was in.”

A family member took ill and required family support and I **became the primary caregiver.”**

I was **pregnant and had a baby** in the last year, so it made it difficult to get out of the house.”

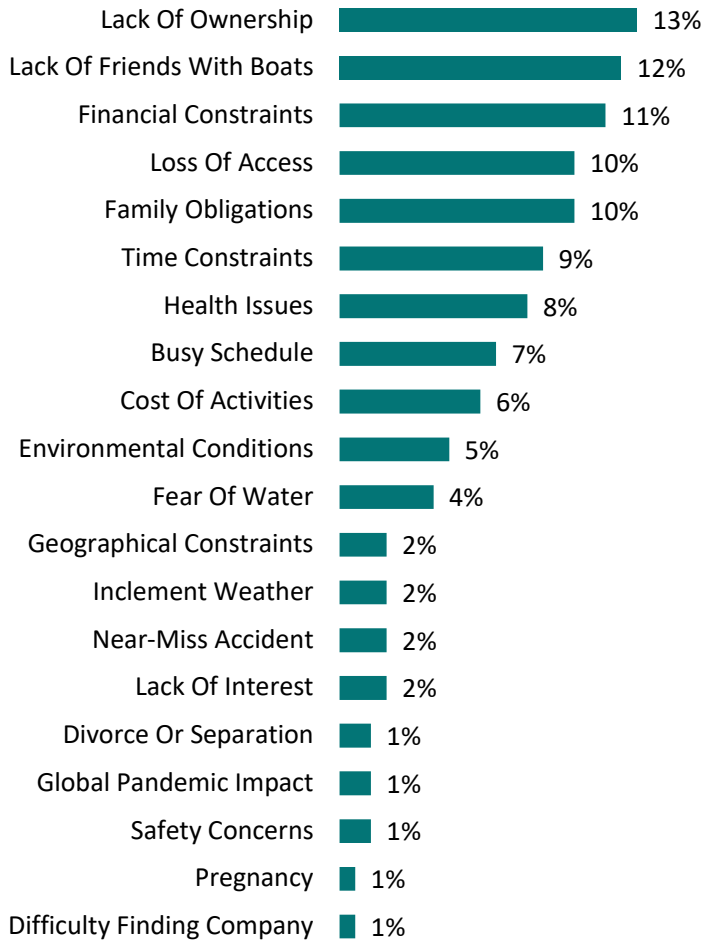
I honestly had no free time. I was working and **caring for my ill mother.”**

Base: Total Lapsed Anglers (n=301)

Q14a. Now, you say that you did not participate in fishing last year even though you did before then. Can you identify a specific incident, event, or factor that led you to choose not to participate? What did you choose to do instead? What criteria did you consider when making this decision? Please be as detailed in your response as possible.

The majority of Lapsed Boaters unaidedly mention **not having access** to a boat as the main reason why they stopped. Many also mention the **financial constraints** that come along with boating, which is unsurprising given the nature of the activity, and the current climate of the economy.

KEY THEMES IDENTIFIED FOR CESSATION MOMENT



Lack of Ownership



Sold the boat. Not interested in buying new boat and all equipment.”

I do not have a boat and no longer have a family member with a boat.”

The boat was my dad’s boat and he moved to a different state. Eventually, when we can afford to, **my long-term goal is to purchase my own boat** in the next 5 years or so.”

Financial Constraints



Reason why this year is because we **don’t have the means** to do anything outside of going camping at a campground for a few days.”

My friend sold his boat and with expenses going up, **it was too much to manage renting a boat.**”

I had a **pay decrease at work**, so I had to sell my boat.”

Lack of Friends with Boats



I just **stopped going with my friend** to their lake.”

I didn’t participate because **my brother sold his boat**, and I don’t know anyone else who has one.”

I participated **when I was invited with a friend to her friend’s boat**. She hasn’t gone again so I haven’t either.”

I only had access to a boat **through my friend inviting me.**”

Loss of Access



We **no longer have our boat** and moved from Colorado where we boated and fished.”

The **boat I used to borrow was sold**. It was my grandfather’s boat and he sold his cabin and boat, so I no longer can do boating.”

My fiancé owned the boat and passed away a few years ago. **I no longer have access to a boat or anyone to go with.**”

Base: Total Lapsed Boaters (n=150)

Q14b. Now, you say that you did not participate in boating last year even though you did before then. Can you identify a specific incident, event, or factor that led you to choose not to participate? What did you choose to do instead? What criteria did you consider when making this decision? Please be as detailed in your response as possible.



THE COM-B MODEL

To enable us to more systematically capture and size key barriers to retention, we utilized the COM-B model as a proven framework for understanding the barriers and therefore addressable levers to behavioral adoption/retention. The COM-B model states that behaviors are unlikely to occur if individuals don't feel they have 3 key elements in support of that behavior: **capability**, **opportunity**, or **motivation**.



To enhance retention, we must better understand the role of each element:



C-CAPABILITY

Be physically and psychologically capable

How can we enable Anglers and Boaters by making it mentally and physically easier to get started & keep participating (Headwinds)



O-OPPORTUNITY

Have the opportunity to participate

How can we enable them via social support, localized/ experimental opportunities? (Tailwinds)



M-MOTIVATION

Be motivated by goals and needs that are served by the behavior

How can we better align and communicate personal goals with benefits of fishing/boating?

Barriers to fishing and boating are fairly consistent across both groups, with **other obligations, hobbies, and responsibilities taking priority** being the **most key barriers**. However, there are some nuances between the two activities; **Lapsed Anglers are more likely to experience ‘I wanted to do something more exciting/thrilling’** as a barrier, while **Lapsed Boaters are more likely to experience setbacks around equipment access and affordability**.

Universal Barriers

		Total	Angler	Boater
		Rank		
Opportunity	Other family obligations took over my time	1	1	2
Motivation	I did other things with my family	2	2	1
Opportunity	I did other things for myself with my time	3	3	3
Motivation	Other hobbies of mine took priority	4	6	6
Motivation	Activities of dependents/significant other took priority	5	4	7
Motivation	Household/work responsibilities took priority	6	5	8
Motivation	I wanted to use my time more productively	7	7	13
Motivation	I prioritized more indoor activities	8	8	10
Opportunity	I don't have who I used to go with	9	9	5
Opportunity	I don't have anyone to go with	10	10	12
Opportunity	I wanted to stay closer to home	11	11	11
Opportunity	I didn't have access to the equipment I need	12	16	4
Motivation	I prioritized more physical activities	13	12	14
Opportunity	I had/have to travel too far	14	14	15
Motivation	I wanted to do something more exciting/thrilling	15	13	20
Capability	Equipment was too expensive	16	22	9
Opportunity	I didn't feel safe/comfortable doing this alone	17	15	18
Opportunity	I don't know where I can do this near me	18	17	19
Capability	Maintenance/ Upkeep was too difficult	19	23	17
Capability	I couldn't find resources to get me started	20	24	16

		Total	Angler	Boater
		Rank		
Motivation	I wanted something more mentally challenging	21	18	25
Motivation	It didn't feel rewarding	22	19	29
Capability	A license was too expensive	23	25	21
Capability	My health wasn't allowing me to continue	24	21	28
Capability	I didn't have anyone to teach me/ mentor me	25	26	22
Motivation	I wanted something more physically challenging	26	20	30
Motivation	Shopping and choosing equipment felt too overwhelming	27	27	27
Capability	Getting a license/registration was too hard	28	29	23
Capability	I didn't have anyone to answer my questions	29	30	24
Motivation	I was not good at it	30	28	33
Motivation	I couldn't get the help I needed while shopping to choose the right equipment	31	32	26
Capability	I couldn't figure out how all of the equipment worked	32	34	31
Motivation	I felt self conscious doing it	33	33	35
Motivation	I got bored	34	31	36
Capability	It was too difficult to learn	35	37	32
Motivation	I worried about causing animal harm	36	35	38
Motivation	I worried about the negative impact on the environment	37	36	37
Capability	I felt intimidated by the sport	38	39	34
Motivation	I didn't feel represented in the community	39	38	39
Motivation	I had a bad experience with law enforcement	40	40	40

Base: Total Lapsed Anglers (n=301); Total Lapsed Boaters (n=150)

Q15A. You'll now see combinations of different reasons for why you may have stopped fishing. Select the one that applies most and then the one that applies least.

Q15B. You'll now see combinations of different reasons for why you may have stopped boating. Select the one that applies most and then the one that applies least.

PERSONAS

Lapsed Angler and Boater Personas



5 personas emerged, distinct from one another on the barriers that prevent them from fishing and boating and **what they need to re-engage**. Personas are similarly sized to one another, and most are sizeable among both Lapsed Anglers and Boaters.

20%, GEOGRAPHICAL SUPPORT

- 21% of Lapsed Anglers, 17% of Lapsed Boaters

"I moved from one state to another, so fishing was not as available."

20%, MORE ADRENALINE

- 24% of Lapsed Anglers, 12% of Lapsed Boaters

"I did not think that it was fun like it used to be."

20%, AFFORDABLE ACCESS

- 12% of Lapsed Anglers, 35% of Lapsed Boaters

"The boat is broken, and the spouse has been jobless, so he can't get it fixed."



18%, AN ENTHUSIASTIC BUDDY

- 17% of Lapsed Anglers, 21% of Lapsed Boaters

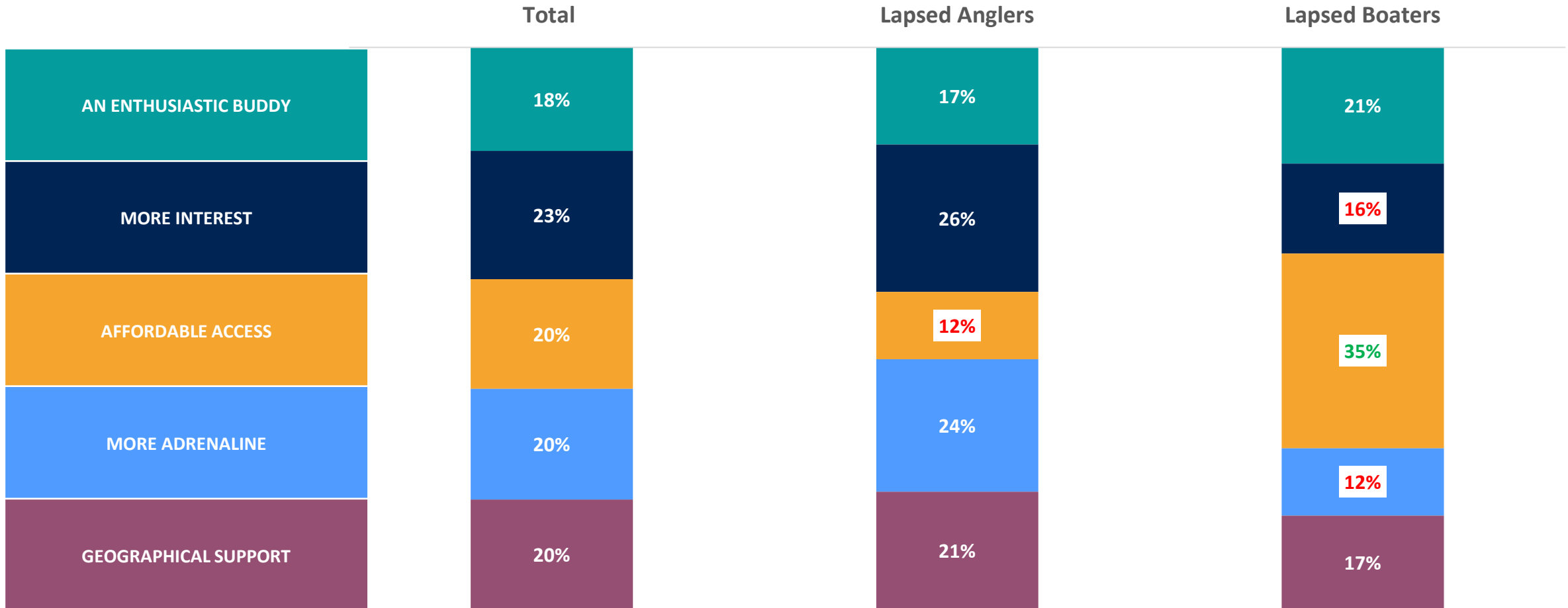
"I did not fish because my husband wasn't with me; I only go with him."

23%, MORE INTEREST

- 26% of Lapsed Anglers, 16% of Lapsed Boaters

"I'm having too many muscle problems to handle the effort of getting to fishing spots."

Although all Personas exist within both Lapsed Anglers and Lapsed Boaters, some Personas have a larger presence than others due to the **nuances of each activity**.



Certain barriers persist universally across all Lapsed Anglers and Boaters, regardless of the persona they are in, **allowing for streamlined thinking.**

All Lapsed Anglers and Boaters face challenges related to other **commitments and priorities**, be it personal or family-related. Relatedly, they express a desire to use their time **more productively**. These themes echo the BeSci mindsets identified across lapsed individuals—indicating a scaled need to consider how we can more strategically **align fishing/boating to current routines and piggyback off other current interests to build the activities into their lives.**

While these universal barriers pave the way for a unified approach, there are **other barriers at play that allow for targeted solutions and messaging.**

	AN ENTHUSIASTIC BUDDY	MORE INTEREST	AFFORDABLE ACCESS	MORE ADRENALINE	GEOGRAPHICAL SUPPORT	
Universal Barriers	<i>Other family obligations took over my time</i>	6	1	1	3	1
	<i>I did other things with my family</i>	4	3	2	1	2
	<i>I did other things for myself with my time</i>	2	5	4	2	3
	<i>Other hobbies of mine took priority</i>	5	7	9	4	12
	<i>Activities of dependents/significant other took priority</i>	17	2	6	5	7
	<i>Household/work responsibilities took priority</i>	16	4	8	7	4
	<i>I wanted to use my time more productively</i>	7	9	15	6	11
	<i>I prioritized more indoor activities</i>	9	8	12	8	9
	<i>I don't have who I used to go with</i>	1	12	7	14	8
	<i>I don't have anyone to go with</i>	3	14	10	16	6
I wanted to stay closer to home	10	10	18	11	5	
I didn't have access to the equipment I need	12	23	3	19	13	
I prioritized more physical activities	23	13	19	9	16	
I had/have to travel too far	24	11	21	18	10	
I wanted to do something more exciting/thrilling	13	22	25	10	19	
Equipment was too expensive	21	26	5	20	18	
I didn't feel safe/comfortable doing this alone	11	16	16	30	14	
I don't know where I can do this near me	19	27	24	21	15	
Maintenance/ Upkeep was too difficult	26	20	13	23	21	
I couldn't find resources to get me started	20	32	14	22	20	
I wanted something more mentally challenging	25	15	29	13	22	
It didn't feel rewarding	8	25	31	15	30	
A license was too expensive	34	17	11	29	24	
My health wasn't allowing me to continue	38	6	27	33	17	
I didn't have anyone to teach me/ mentor me	15	28	22	26	28	
I wanted something more physically challenging	29	36	30	12	26	
Shopping and choosing equipment felt too overwhelming	31	37	17	24	23	
Getting a license/registration was too hard	35	18	20	28	27	
I was not good at it	14	24	32	25	31	
I felt self conscious doing it	27	21	34	36	34	
I got bored	18	40	39	17	39	
I worried about causing animal harm	36	19	37	37	33	

Green = over index vs Total; Red = under index vs Total



Many also mentioned wanting more support—both in terms of someone to go with and making it easier to get started (**Opportunity** & **Capability** barriers). Look for scaled opportunities to address multiple needs at once.

People don't know what they don't know going into any new hobby, until they are jumping in and feeling lost/overwhelmed/discouraged.

In this case, they acknowledge that they can get on the web and probably find some information, but they yearn for more “push” communications about experiential opportunities to learn (dip toe in the water with support), gather with others/learn together, and find that sense of community, etc. (for both fishing & boating).

Provide experiential, social education to increase self-efficacy & social support early on to reduce attrition.

Leverage learning goals in parks / recreation areas / corporate outreach or events to have not just free fishing events but guided opportunities to learn with family/friends (it becomes a memory-making event + opportunity to learn) so it's less daunting getting started and more likely to stick, if they are empowered with basic skills to go on their own in the future.

It also elevates the chances that friends/family attend the event together—building in social support.

In some cases, it might be that local partners are already hosting relevant events but need more help/support in terms of awareness and framing for these initiatives.

Be a guide for how to get plugged into the community:

HOW TO GET STARTED



CONTACT YOUR LOCAL CROSSFIT GYM

Reach out to your nearest CrossFit gym to ask about their schedule, prices and how to get started—some may even offer a free trial.



JOIN A CLASS

In a typical one-hour CrossFit class, athletes complete modified versions of the same workout together, and the coach will guide you through step-by-step.



LEARN THE FUNDAMENTALS

Your gym will help you safely start your CrossFit journey, no matter how fit you are. Coaches teach you the foundational movements and adjust workouts to your fitness level.

State Parks > Blanco State Park > Events

Blanco State Park

- Overview
- Maps
- Fees & Facilities
- Nature
- History
- Events

Jan 27

10:00a

Look out for the Trout Festival

Learn everything you need to know about fishing, including trout fishing! We'll even provide the gear. This event coincides with the last trout stocking of the season at Blanco State Park.

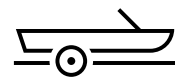


18%

*I have fished and boated in the past **with loved ones but am not able to go with them anymore.** I wouldn't consider myself a seasoned expert by any means **and don't find doing these things alone to be rewarding.** I would consider giving it another try, if I had someone more experienced to accompany me every so often or on holidays.*

I need someone to go with, to make fishing and boating more rewarding.

OVERALL



18%

% OF LAPSED ANGLERS

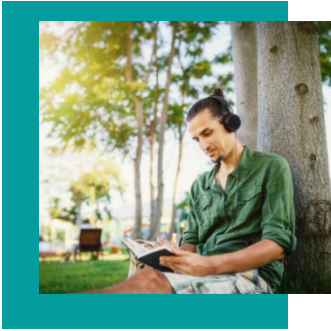


17%

% OF LAPSED BOATERS

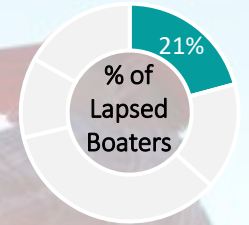
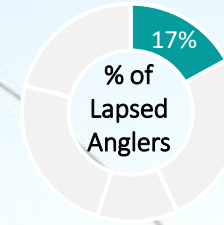
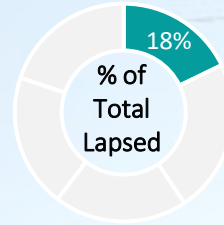


21%

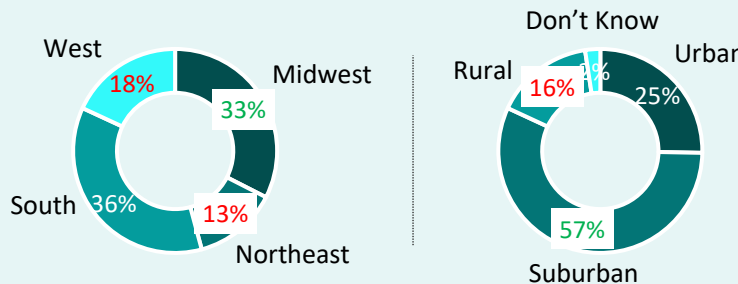
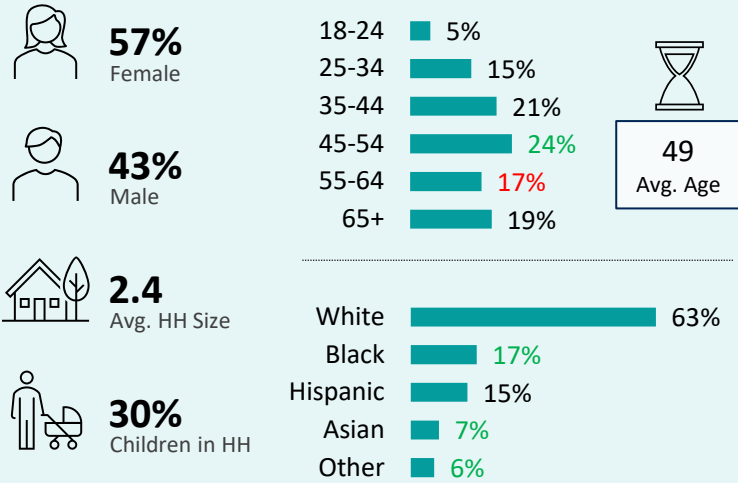


This persona consists of both Lapsed Anglers and Boaters who are more likely to live in the Midwest in Suburban environments. They **don't have anyone to go fishing/boating with**, making the activity feel **less rewarding** to them. This group has a skew towards the "Uncommitted" segment, indicating a **low likelihood of consistent outdoor activity**, even if they do re-engage.

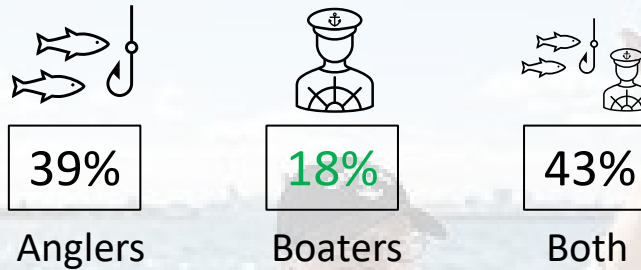
An Enthusiastic Buddy



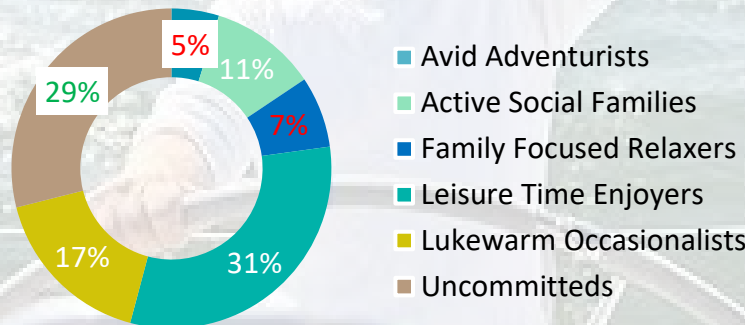
KEY DEMOGRAPHICS



PERSONA MAKEUP



CONSUMER SEGMENTS



MOST IMPACTFUL BARRIERS

Ranked High to Low
(Excluding Universal Barriers of Other Obligations and Time)

- O I don't have **who I used to go with**
- O I don't have **anyone to go with**
- M It didn't feel **rewarding** ↑
- O I wanted to stay **closer to home**
- O I didn't feel **safe/comfortable** doing this alone ↑
- O I didn't have **access to the equipment** I need
- M I wanted to do something more **exciting/thrilling**
- M I was **not good at it** ↑
- C I didn't have anyone to **teach me/mentor me** ↑
- M I got **bored** ↑
- C I didn't have anyone to **answer my questions** ↑

Base: An Enthusiastic Buddy (n=83)
Multiple Questions: QS1, QS2, QS4, QS5, QS7, QS8, HIDDENREGION, HQ.CATEGORY, HIDDEN SEGMENT MARKER
Green / Red Font Based on Significantly High / Low Index Compared to Total Average (Green > 120, Red < 80); Indexing reported if Total Average = 5%+

Showing top barriers for this persona, in rank order. COM = COM-B coding. Green/Red arrow indicates barriers that are over/under-index compared to Total Average; All barriers shown are top barriers for this persona.

WHO THEY ARE: PERSONAL ENGAGEMENT AND IDENTITY

Given those within this persona have less positive first impression memories of fishing and boating, are beginner-level, and do not feel their identity is in-line with a typical Angler or Boater, it **will take a lot of work to reel them back into fishing/boating**. Given this persona expresses not having anyone to go with, consider finding ways to connect them with others who are looking for a fishing/boating community, or utilize already existing interests, like reading (i.e., a book club that also has fishing outings).

FIRST IMPRESSIONS

ANGLERS		BOATERS*	
Hard to catch a fish	62%	Hard to navigate	45%
Time consuming	42%	Too much equipment	45%
Boring (vs Fun)	35%	Exciting	32%
Expensive	27%	Stressful	19%
Too much equipment	23%	Time consuming	19%

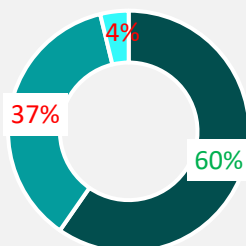
REASONS FOR TRYING

- ✓ Time outdoors
- ✓ Bonding with family
- ✗ To relax

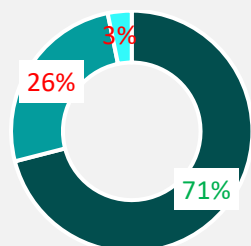
- ✓ Time outdoors
- ✓ Bonding with family
- ✓ Try something new

SKILL LEVEL

■ Beginner ■ Intermediate ■ Advanced



29% Participated 1 Day;
27% Participated More than 5 days



32% Participated 1 Day;
22% Participated More than 5 days

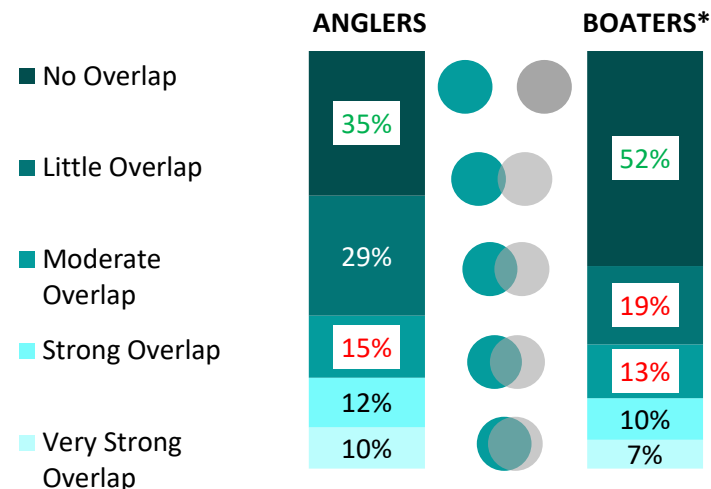
*Low base size

Base: An Enthusiastic Buddy (n=83), Anglers (n=52), Boaters (n=31)*

Multiple Questions: Q11A, Q11B, Q10, Q9, Q12, Q13, Q1, Q14A, Q14B, Q24

Green / Red Font Based on Significantly High / Low Index Compared to Total Average (Green > 120, Red < 80); Indexing reported if Total Average = 5%+

IDENTITY OVERLAP



CESSATION MOMENT

I did not fish because **my husband wasn't with me**; I only go with him."

My dad, who I only went fishing to spend time with, died."

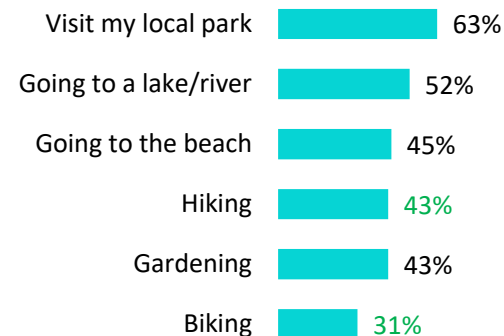
I need instructions on how to do this."

Most of the people I boated and fished with **have passed on."**

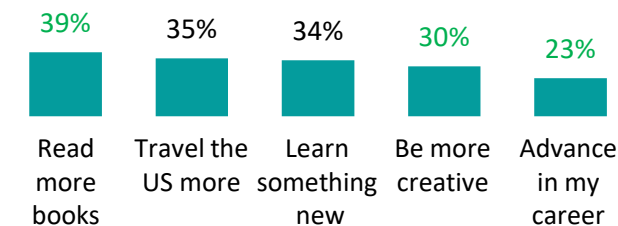
It just **wasn't too interesting**, so it isn't my top choice."

OTHER OUTDOOR ACTIVITIES

3.5
Mean #






KEY PERSONAL GOALS



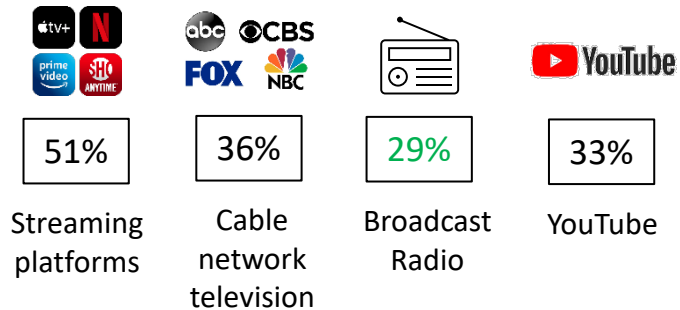
ACTIVATION

TAILWINDS

ANGLERS	BOATERS*
<p>Community & Mentoring</p> 	<p>Community & Accessibility</p> 
<ul style="list-style-type: none"> Someone to go with Events like pop-in classes w/ assistance from experienced Anglers In-person mentors 	<ul style="list-style-type: none"> Someone to go with Affordable boat rentals & storage/docking In-person meet-ups Local boating locations and clubs

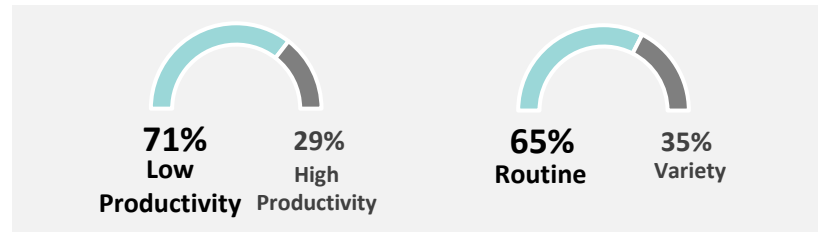
 Nostalgia Proneness: 3.1

PRIORITY CHANNELS



*Low base size
 Base: An Enthusiastic Buddy (n=83), Anglers (n=52), Boaters (n=31)*
 Multiple Questions: Q16A, Q16B, Q27, Q28, Q29, Q17, Q18
 Green / Red Font Based on Significantly High / Low Index Compared to Total Average (Green > 120, Red < 80); Indexing reported if Total Average = 5%+

KEY BЕСCI MINDSETS



ALIGNING ACTIVATION TO INSIGHTS

These individuals find it **easier to relax** than other personas (less focused on being “productive”) and are also more set (find comfort) in their routines. **Consider ways to build into their current routines & create new routines via the social connection that they seek.**

Consider initiatives that can help foster boating/fishing connections—e.g., monthly meet-ups, book club + boating.

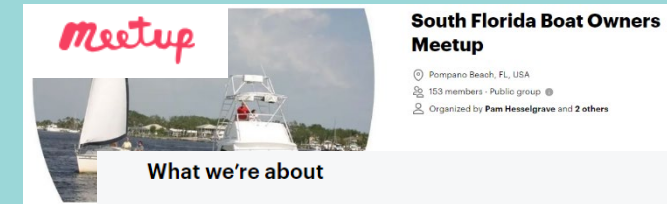
- Consider ways to create visit points (check-ins), rewards systems, and events around bringing a friend or joining a group from the start (of reengagement). Recent work found support for the power of “tandem-rewards”—35% more gym visits resulted when the reward required working out with a friend/someone else.
- Tandem rewards increased behavioral outcomes but also perceived enjoyment**—by making the rewards social in nature.



We can also **amplify the perceived “rewards”** for this group by tying to other stated goals—e.g., listening to an audiobook while fishing/boating, exploring new areas, adding a fishing stop to a hike, taking care of mental health with a dose of the outdoors (routine “me” time), etc.



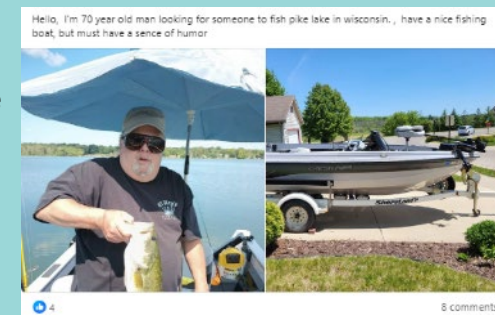
Reinforce in messaging that expert guides/mentors will be along for the journey and the **added rewards/benefits of the activity**, like exploring a new lake, networking with other women like you, etc.



What we're about

We are a Meetup extension of South Florida Sailors and Boaters, and we welcome singles and couples with boats who share a passion for boating. What's in it for you?
 Networking with other knowledgeable Captains
 Advanced instruction from our experienced Captains if you're new to boating.
 Extensive Crew pool of experienced sailors and boaters
 Weekly Socials every Wednesday at Galuppi's in Pompano Beach where
[Read more](#)

Match up retained, experienced Boaters/Anglers with more novice ones—experts often like to share their knowledge, while this novice persona benefits from lower commitment and startup needs + increased social rewards.



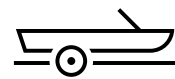
23%



I used to fish fairly often up until my health started declining, though there are lots of other reasons why I stopped. I would feel more comfortable getting back into the water if A) I could fish somewhere closer to home, B) It were easier to get a license, and C) I knew I wasn't causing harm to the environment. I'm known to be a little noncommittal, so even in a perfect world, I probably wouldn't fish all that often.

I need more interest in the activity.

OVERALL



23%

% OF LAPSED ANGLERS

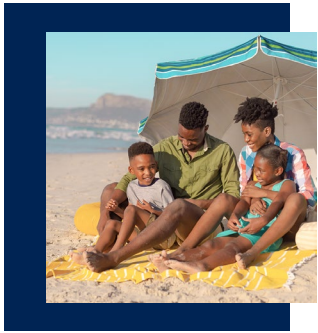


26%

% OF LAPSED BOATERS

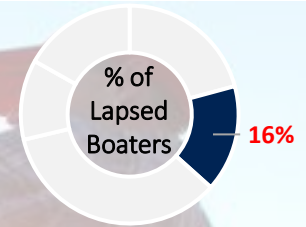
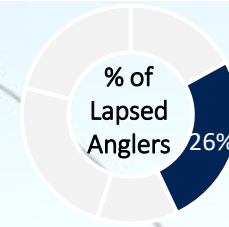
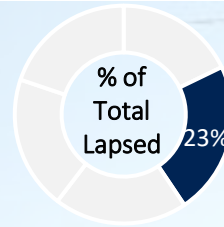


16%

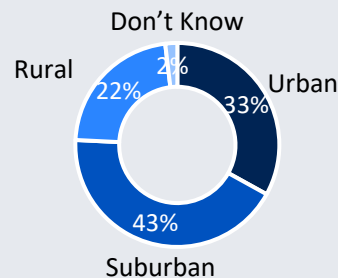
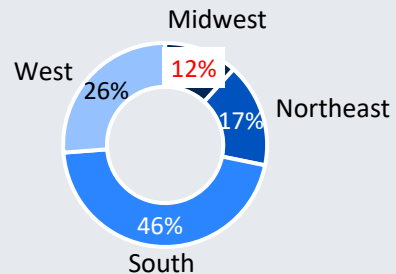
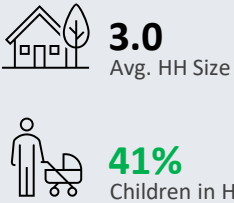
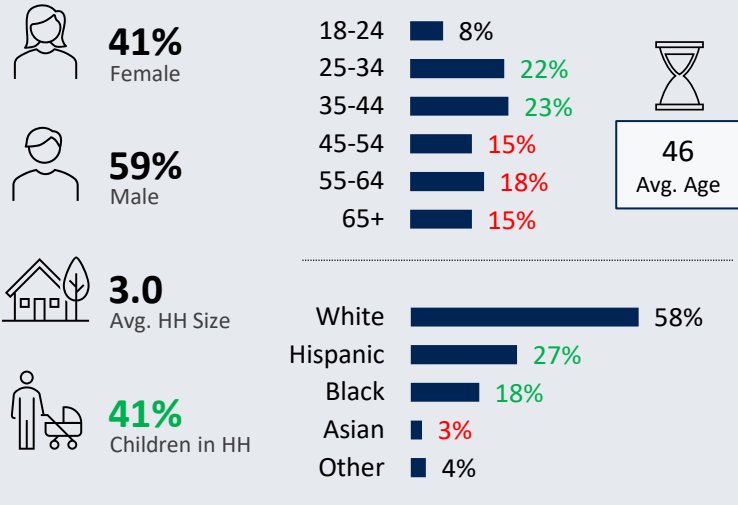


This persona consists of **mainly middle-aged Anglers**, who are more likely to be “Lukewarm Occasionalists” or “Uncommitteds”, indicating this group has a **lower likelihood to return**. Health is their #1 reason for Lapsing, which will be a **difficult barrier to overcome**, while there are also barriers around inclusion and sustainability, likely driven by the presence of younger Lapsed Participants.

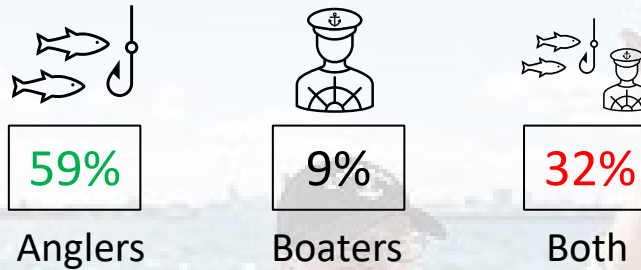
More Interest



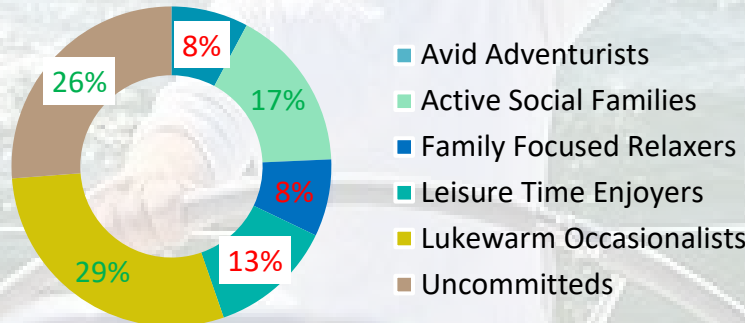
KEY DEMOGRAPHICS



PERSONA MAKEUP



CONSUMER SEGMENTS



MOST IMPACTFUL BARRIERS

- Ranked High to Low
(Excluding Universal Barriers of Other Obligations and Time)
- C** My **health** wasn't allowing me to continue ↑
 - O** I wanted to stay **closer to home**
 - O** I had/have to **travel too far**
 - O** I don't have **who I used to go with** ↓
 - M** I prioritized **more physical activities**
 - O** I don't have **anyone to go with** ↓
 - M** I wanted something **more mentally challenging**
 - O** I didn't feel **safe/comfortable doing this alone**
 - C** A license was **too expensive** ↑
 - C** Getting a license/registration was **too hard** ↑
 - M** I worried about **causing animal harm** ↑
 - M** I felt **self conscious** doing it ↑
 - M** I was **not good at it** ↑

Base: More Interest (n=103)
Multiple Questions: QS1, QS2, QS4, QS5, QS7, QS8, HIDDENREGION, HQ.CATEGORY, HIDDEN SEGMENT MARKER
Green / Red Font Based on Significantly High / Low Index Compared to Total Average (Green > 120, Red < 80); Indexing reported if Total Average = 5%+

Showing top barriers for this persona, in rank order. COM = COM-B coding. Green/Red arrow indicates barriers that are over/under-index compared to Total Average; All barriers shown are top barriers for this persona.

WHO THEY ARE: PERSONAL ENGAGEMENT AND IDENTITY

Anglers in this persona held an intermediate skill level before lapsing, suggesting that obstacles beyond 'getting started hurdles', such as a **lack of identification with the Angler community** or **worsening health concerns**, prevented their continued participation. Consider exploring approaches to emphasize the communal aspect of fishing, as the **presence of trusted companions could potentially alleviate health-related anxieties**.

FIRST IMPRESSIONS

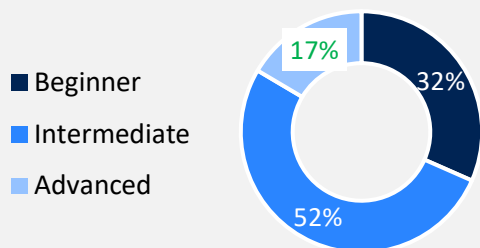
ANGLERS

Hard to catch a fish	57%
Hard to get started	27%
Too much equipment	23%
For serious outdoor people	35%
Time consuming	43%

REASONS FOR TRYING

- ✓ Time outdoors
- ✓ Outlet to disconnect and relax
- ✓ Way to bond

SKILL LEVEL

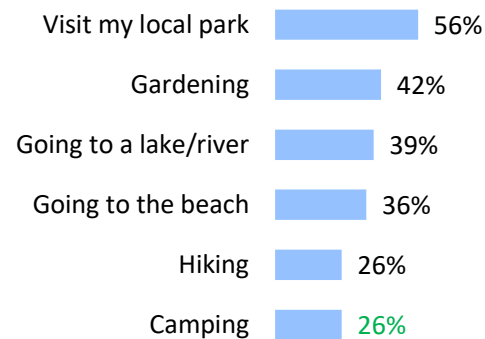


AVG. PARTICIPATION

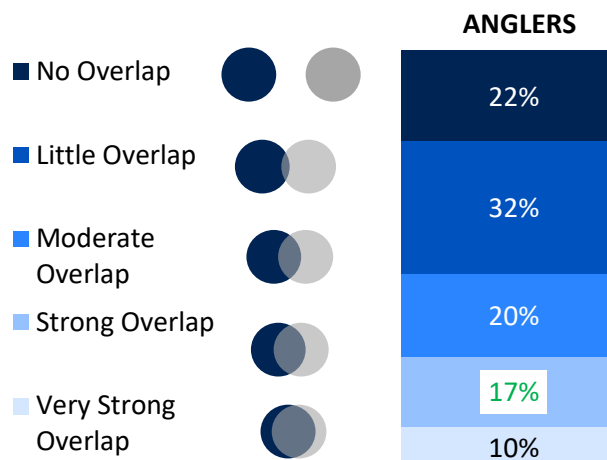


OTHER OUTDOOR ACTIVITIES

3.4
Mean #



IDENTITY OVERLAP



CESSATION MOMENT ANGLERS



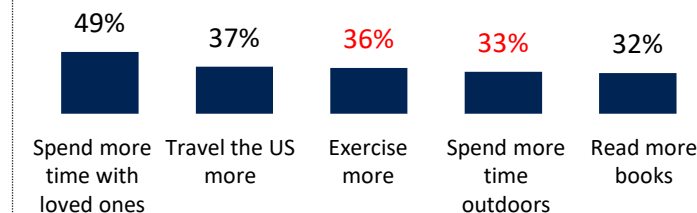
Health did not allow me to go. I mainly visited family and friends and stayed home."

Had a really bad run-in with the **mosquitos and bugs.**"

I'm having **too many muscle problems** to handle the effort of getting to fishing spots."

Fishing is okay once the reel or rod is in the water, **but I don't like putting the worms on the hook nor taking the fish off the hook.** I got stabbed by its fins and that was all it took, I was done. Plus, it's too hot to sit all day and leave with 4 fish."

KEY PERSONAL GOALS



ACTIVATION

TAILWINDS

ANGLERS

Community & Outreach



- If I had someone to go with
- Local fishing club
- In-person meet-ups



- Outreach from local parks and waterways
- Local guidebooks, emails etc.



Nostalgia Proneness: 3.4

PRIORITY CHANNELS



56%

YouTube



52%

Streaming
platforms



44%

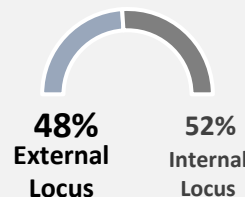
Cable
network
television



41%

Facebook

KEY BЕСCI MINDSETS



Of all personas, this group feels the **least “in control” of their outcomes/life**. They need someone else to take the wheel and be the hero.

ALIGNING ACTIVATION TO INSIGHTS

For this group (especially Active Social Families), **lean into family bonding time as a lever for re-engagement**.

- Given their concerns around **capability, health, difficulties** with getting set up, and higher inclination towards external locus of control, **target opportunities for them to join family events where they will have support and assistance with little setup or effort needed on their part** (the expert or park ranger is the hero here).
- Use these events to also educate families about sustainability initiatives/practices.

Given their nostalgia proneness, we can also lean into the forward-looking elements of nostalgia, how these are opportunities for them to build lasting, core memories and get the family outdoors.

- **Ensure we feature a variety of types of families, including ensuring that Blacks and Hispanics are represented.**

Note, during current times of economic uncertainty and when experiencing loneliness, consumers are even more likely to feel and seek nostalgia.



About The Event

This event is sponsored by the Greenline SA, a “free community” youth fishing clinic from ages 5 to 16. Check-in for online and onsite registration opens at 9 am till 11 am. All equipment will be provided for the event. Fin Addict Instructors and volunteers will educate the youth on the basics of fishing through fun methods making this event full of excitement! We encourage you to wear comfortable clothing and plenty of sun protection. **Adults must accompany children.** Volunteers age 18 & older are welcome to apply online or email volunteer@finaddictangler.org. Youth 14-17 years of age who wish to support their community and others by volunteering or need community hours for school can register online with written parental consent. Donations are welcomed to support funding for the needs of our mission.

[Read More >](#)

Leverage **social media** to increase awareness of such events – ensure messaging emphasizes “family fun,” assistance/support provided, no need for license or gear, etc.

OUTDOOR ACTIVITY

Free Fishing Pop Up (Ecorse)

Come join us at John D Dingell Park in Ecorse to learn about fishing and fish with a ranger!

All are welcome, and no registration is needed! All fishing gear will be provided. Please dress for the weather, bring a friend, and carry water with you.

Detroit River International Wildlife Refuge

John D. Dingell Park



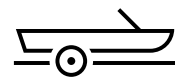
20%



*Boating was a passion of mine until I got laid off and had to sell my boat. I miss spending time out on the water, but **the financial burden just became too much** between the cost of a license, the upkeep of a boat, and how much equipment is needed. If there were ways that I could **rent equipment or split a timeshare** without committing to the full cost of a boat, I'd be more inclined to get back onboard.*

I need a more affordable way to get back on the water.

OVERALL



20%

% OF LAPSED ANGLERS

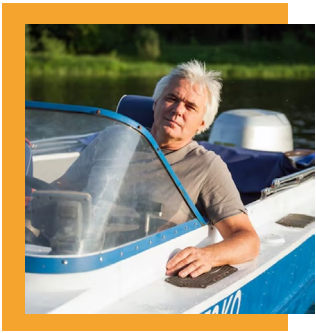


12%

% OF LAPSED BOATERS

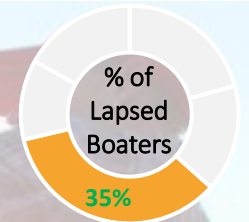
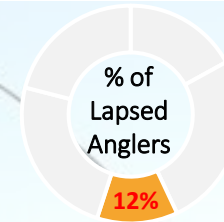
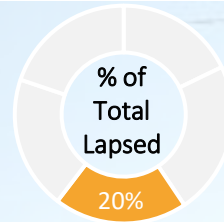


35%

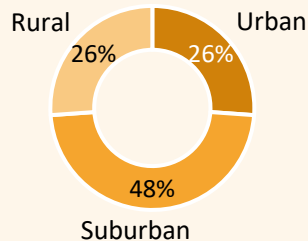
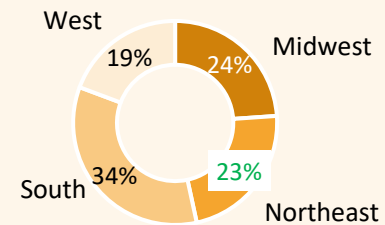
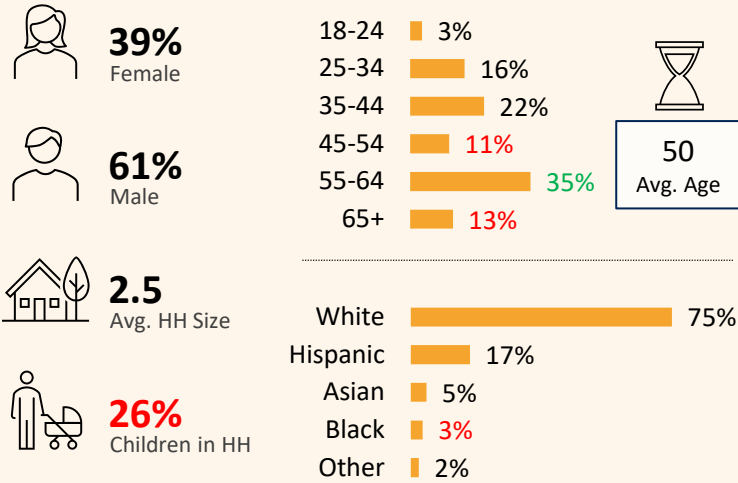


This persona's barriers revolve around not having access to equipment, **often due to the cost**; Unsurprisingly, 1-in-3 Boaters lapsed for this reason, and majority of this persona consists of Boaters. The higher presence of 'Avid Adventurists' reflects this group's spirit for the outdoors, indicating a **higher propensity to return**, if the proper **price-conscious re-engagement strategies** are implemented.

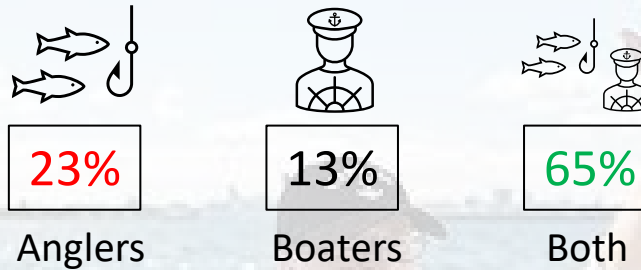
Affordable Access



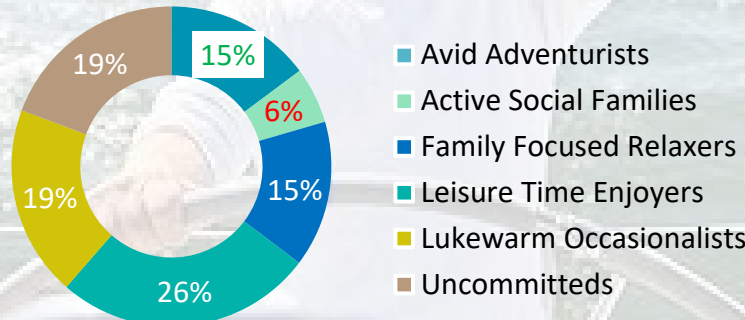
KEY DEMOGRAPHICS



PERSONA MAKEUP



CONSUMER SEGMENTS



MOST IMPACTFUL BARRIERS

- Ranked High to Low
(Excluding Universal Barriers of Other Obligations and Time)
- O** I didn't have access to the equipment I need ↑
 - C** Equipment was too expensive ↑
 - O** I don't have who I used to go with
 - O** I don't have anyone to go with
 - C** A license was too expensive ↑
 - C** Maintenance/upkeep was too difficult ↑
 - C** I couldn't find resources to get me started ↑
 - O** I didn't feel safe/comfortable doing this alone
 - M** Shopping and choosing equipment felt too overwhelming ↑
 - O** I wanted to stay closer to home
 - C** Getting a license/registration was too hard ↑
 - M** I couldn't get the help I needed while shopping to choose the right equipment ↑

WHO THEY ARE: PERSONAL ENGAGEMENT AND IDENTITY

Despite this group’s initial perception that Boating is both exciting and relaxing, they also acknowledged **high costs and expensive equipment requirements, making it hard to continue with the activity**. Their identity moderately overlaps with that of a typical Boater, suggesting a **higher propensity to come back to the activity once the financial hurdle is overcome**. Consider implementing strategies like **rental services or ‘timeshare’ arrangements** to make Boating a more affordable and accessible way to spend time outdoors and with loved ones.

FIRST IMPRESSIONS

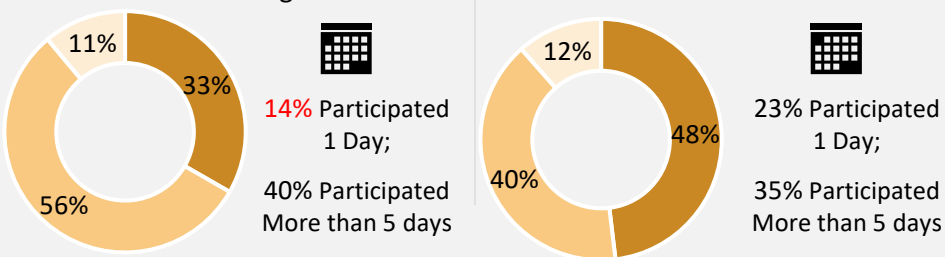
ANGLERS*		BOATERS	
Relaxing	81%	Expensive	77%
Easy to catch a fish	72%	Too much equipment	65%
Too much equipment	22%	Hard to get started	62%
		Exciting	54%
		Relaxing	89%

REASONS FOR TRYING

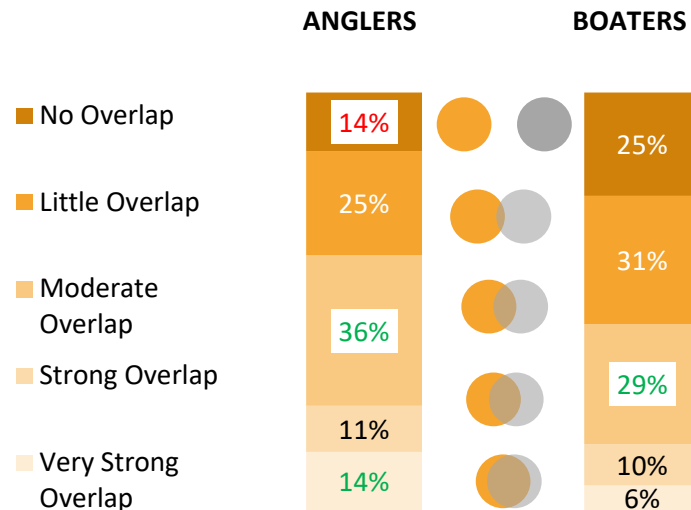
- ✓ Time outdoors
- ✓ Outlet to disconnect and relax
- ✓ Nostalgic
- ✓ Time outdoors
- ✓ Outlet to disconnect and relax
- ✓ To make memories
- ✓ To be adventurous

SKILL LEVEL

Beginner Intermediate Advanced



IDENTITY OVERLAP



CESSATION MOMENT

The boat is broken, and the spouse has been **jobless**, so he can’t get it fixed.”

I didn’t have a **vehicle or a fishing license or the money or anybody to go with**. Instead, I stayed home and just spent time with family there.”

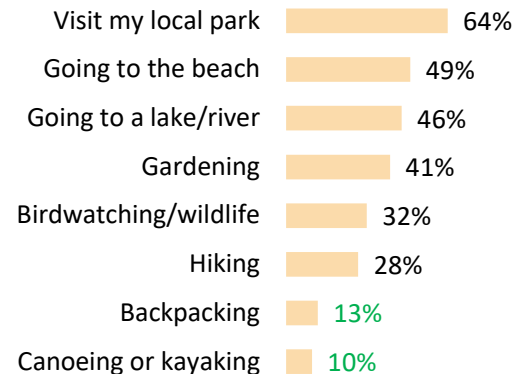
Have just lost interest **because the price of a license is expensive.**”

I had a pay decrease at work, so **I had to sell my boat.**”

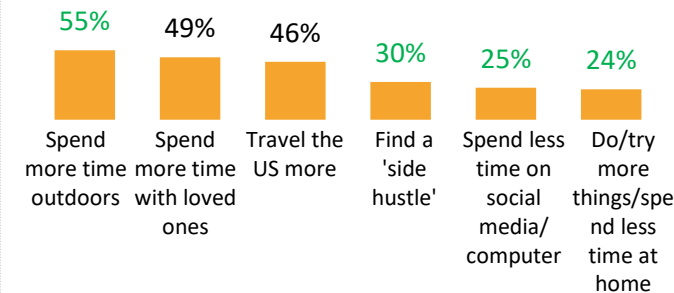
It’s too expensive and I need to save for something else.”

OTHER OUTDOOR ACTIVITIES

3.5 Mean #





KEY PERSONAL GOALS



*Low base size
 Base: Affordable Access (n=88), Anglers (n=36*), Boaters (n=52)
 Multiple Questions: Q11A, Q11B, Q10, Q9, Q12, Q13, Q1, Q14A, Q14B, Q24
 Green / Red Font Based on Significantly High / Low Index Compared to Total Average/Total (Green > 120, Red < 80); Indexing reported if Total Average/Total = 5%+

ACTIVATION

TAILWINDS

ANGLERS*	BOATERS
Community & Accessibility 	Mentoring & Accessibility 
<ul style="list-style-type: none"> Someone to go with In-person meet ups Local clubs Free fishing days Ability to rent rods, lines etc. 	<ul style="list-style-type: none"> More affordable boat rentals More affordable docking/storage Classes based on level Guidance on water rules Courses on safety



Nostalgia Proneness: 3.4

PRIORITY CHANNELS



48%

Streaming
platforms



42%

Videos
online



38%

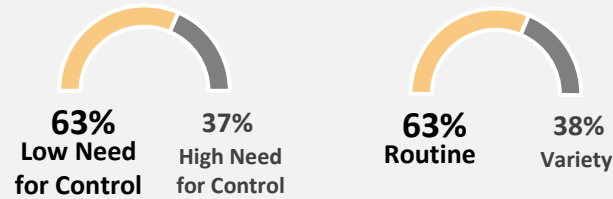
Cable
network
television



41%

Facebook

KEY BESCI MINDSETS

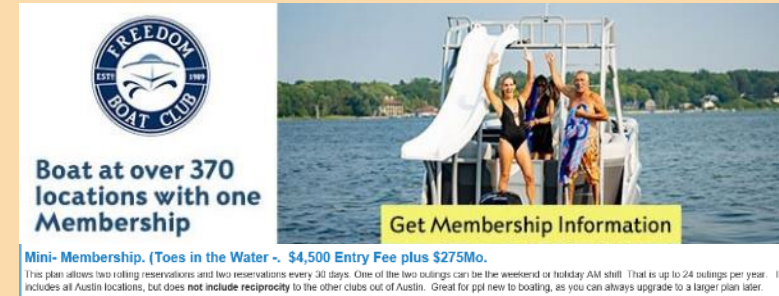


ALIGNING ACTIVATION TO INSIGHTS

Of all personas, this group has the **lowest need for control**—they are willing to let some details go/leave them up to chance. But, they do appreciate and find comfort in their routines.

- **Showcase “shared” boating opportunities** as a way to get the best of all worlds—affordable access to a new boating/fishing routine, all the thrill with zero maintenance/set-up (less control & choice but also less responsibility financially, physically, and mentally), and training included.
- **Consider facilitating or better highlighting existing shared economy models** (like AirBNB, Uber/Lyft)—this could include a “rent”/borrowing model or one where you can book a local ‘guide’ boat experience.
 - Shared resources offer an opportunity to spend more time outdoors, with others, and to disconnect from the bustle of life without the hefty price tag or the headaches of getting started.

Given their nostalgia proneness lean into the forward-looking memory-making piece of nostalgia here as well. **Start making memories now, don’t wait for the right time to buy/own a boat.**



Boat at over 370 locations with one Membership
 Get Membership Information

Mini-Membership. (Toes in the Water - \$4,500 Entry Fee plus \$275Mo.)
This plan allows two sailing reservations and two reservations every 30 days. One of the two outings can be the weekend or holiday AM still. That is up to 24 outings per year. It includes all Austin locations, but does not include reciprocity to the other clubs out of Austin. Great for ppl new to boating, as you can always upgrade to a larger plan later.

Boat Ownership vs. Joining the Club

Boat Price

Slider: \$70,000 (Min to Max)

Boat Club
 No Storage Fee
 No Maintenance Fees
 No Boat Insurance
 No Cleaning
 No Towing
 Park the Boat and You Are Done

Total Savings

1 Year	\$9,415
3 Year	\$33,896
5 Year	\$54,363
10 Year	\$90,598

Details ▶

BeSci can also help to optimize how we frame up such programs—all choices are made within the context of **reference points**.

- **Make sure we highlight not just the cost of the shared program, but how the cost offers saving advantages relative to owning a boat.** We can also consider framing against other salient reference points, like **‘as cheap as your monthly phone bill, but a lot more fun’**.

*Low base size

Base: Affordable Access (n=88), Anglers (n=36*), Boaters (n=52)

Multiple Questions: Q16A, Q16B, Q27, Q28, Q29, Q17, Q18

Green / Red Font Based on Significantly High / Low Index Compared to Total Average/Total (Green > 120, Red < 80); Indexing reported if Total Average/Total = 5%+

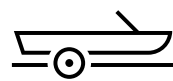
20%



*I used to enjoy going fishing, but as time went on, my thirst for **adrenaline and more physically engaging activities** began to grow. I found myself gravitating towards more thrilling endeavors like hiking and biking. If there were ways to **incorporate the thrill of physical outdoor activities with fishing**, I'd be more inclined to try again.*

I need fishing to meet the thrill of my adventurous spirit.

OVERALL



20%

% OF LAPSED ANGLERS



24%

% OF LAPSED BOATERS

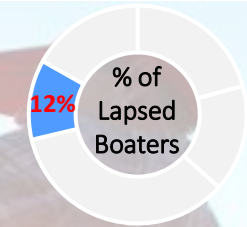
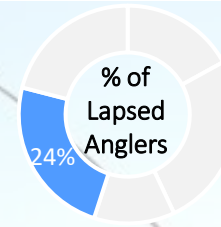
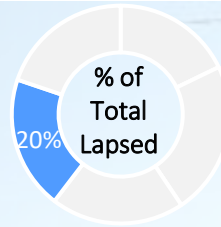


12%

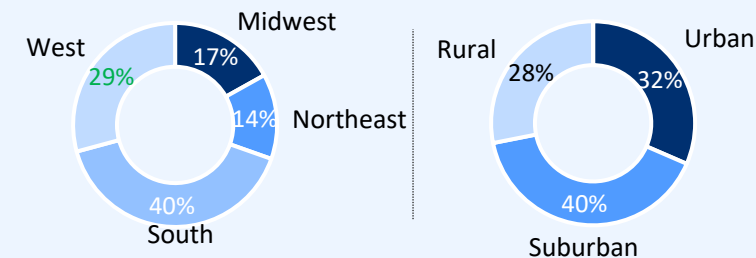
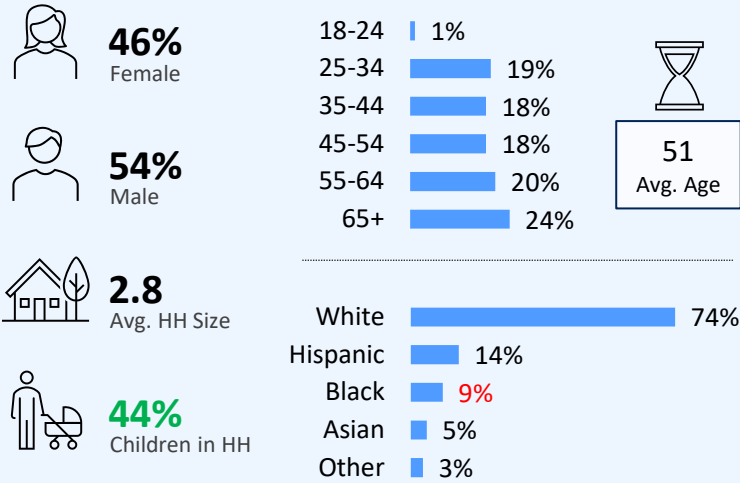


An **Angler-centric persona**, nearly a quarter of Anglers lapsed for this reason. Key barriers are around **prioritizing more physical activities and wanting to do something more “exciting.”** This group has a higher share of ‘Avid Adventurists’ and ‘Active Social Families’, making it a **more likely persona to re-engage** once the spark has been re-ignited due to their love of the outdoors.

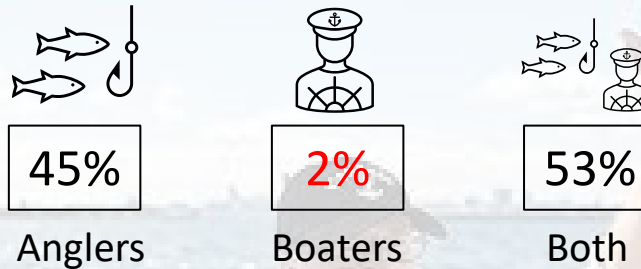
More Adrenaline



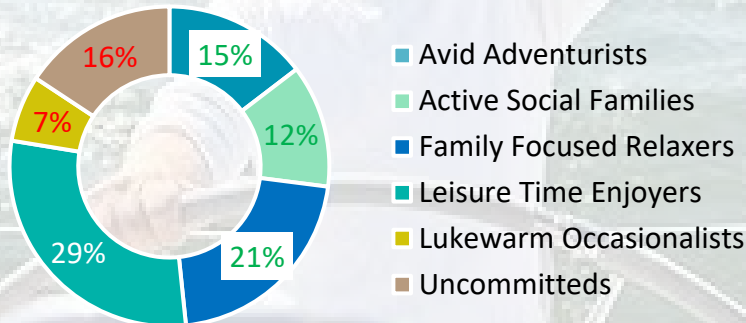
KEY DEMOGRAPHICS



PERSONA MAKEUP



CONSUMER SEGMENTS



MOST IMPACTFUL BARRIERS

Ranked High to Low
(Excluding Universal Barriers of Other Obligations and Time)

- M** I prioritized more **physical activities** ↑
- M** I wanted to do something more **exciting/thrilling** ↑
- O** I wanted to stay **closer to home**
- M** I wanted something more **physically challenging** ↑
- M** I wanted something more **mentally challenging** ↑
- O** I don't have who I **used to go with** ↓
- M** It didn't feel **rewarding** ↑
- O** I don't have **anyone to go with**
- M** I got **bored** ↑
- O** I had/have to **travel too far** ↓

WHO THEY ARE: PERSONAL ENGAGEMENT AND IDENTITY

While Angling initially presented as relaxing, calm, and fun, **this persona's desire for more physically engaging and thrilling activities calls for a different approach.** Consider introducing a **variety of classes focusing on the more exhilarating aspects of fishing** (deep-sea fishing, fishing competitions), or **piggybacking onto other thrilling or physical outdoor activities, such as hiking or biking, or combining with watersports.**

FIRST IMPRESSIONS

ANGLERS

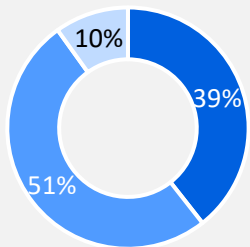
Relaxing	92%
Calm	83%
Fun	75%
Hard to catch a fish	52%

REASONS FOR TRYING

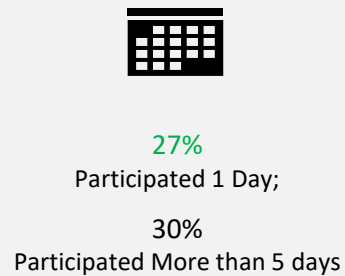
- ✓ Time outdoors
- ✓ Bonding with family
- ✓ Outlet to relax

SKILL LEVEL

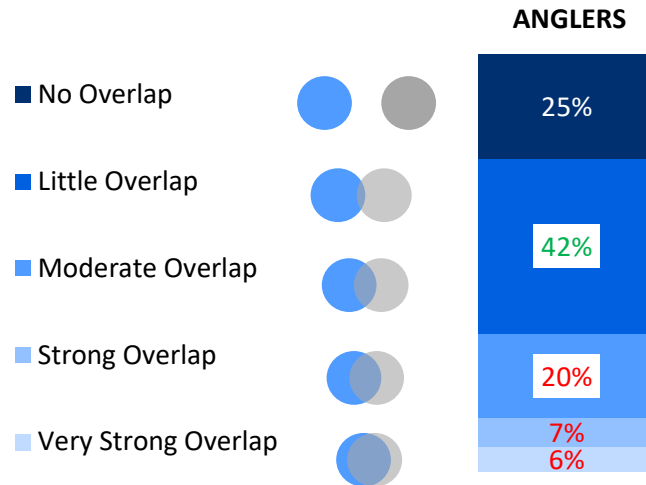
■ Beginner ■ Intermediate ■ Advanced



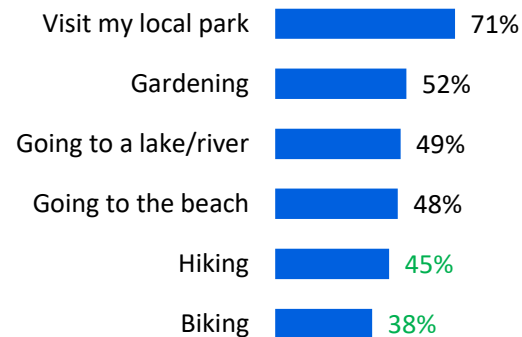
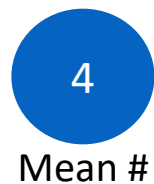
AVG. PARTICIPATION



IDENTITY OVERLAP



OTHER OUTDOOR ACTIVITIES



CESSATION MOMENT ANGLERS



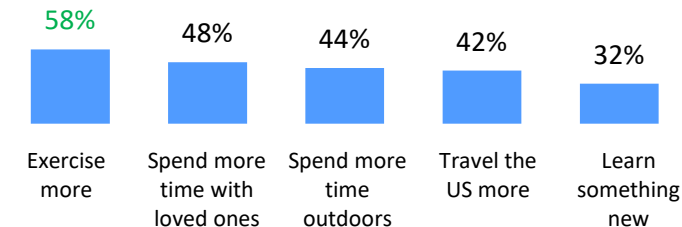
Not enough time and **had other summer interests we did instead.**

I did **not think that it was fun** like it used to be."

It became **more of a chore than a joy**, and I sold the boat."

I did not participate last year in fishing because I was **busy doing other activities with friends and family like going to the lake, going to the beach, and snowboarding.** Other than that, I have just been really busy working and haven't had much time."

KEY PERSONAL GOALS



Base: More Adrenaline (n=89), Anglers (n=71)
Multiple Questions: Q11A, Q10, Q9, Q12, Q1, Q14A, Q2
Green / Red Font Based on Significantly High / Low Index Compared to Total Average/Total (Green > 120, Red < 80); Indexing reported if Total Average/Total = 5%+

ACTIVATION

TAILWINDS

ANGLERS

Outreach & Mentors



- Guidance on where to fish near me
- Outreach from local parks, waterways



- Guidance on types of bait for specific fish
- Classes for safety basics
- Someone to go with



Nostalgia Proneness: 3.18

PRIORITY CHANNELS



69%

Streaming
platforms

55%

Videos
online

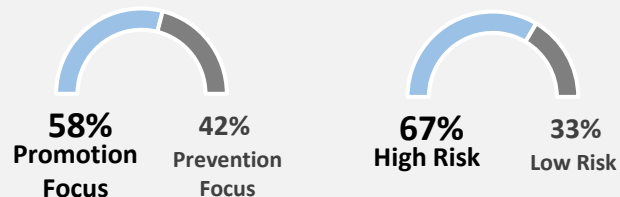
36%

Cable
network
television

35%

Podcasts

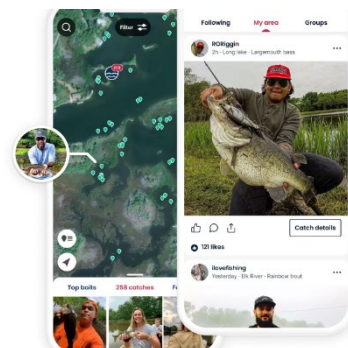
KEY BESCI MINDSETS



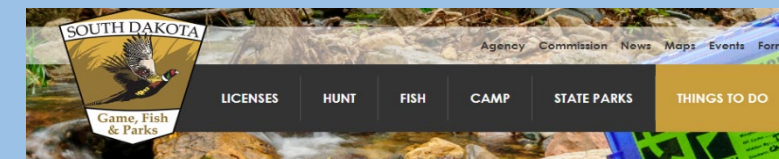
ALIGNING ACTIVATION TO INSIGHTS

This group has the highest propensity for risk & the most promotion-focused mindset. Taken together, **they are most keen of the groups on trying something new** (vs. sticking with the familiar) and are also **more likely to choose new activities that offer additional enjoyment, something to explore/excite, and/or “achievement.”** It will be key to showcase how returning/trying fishing gets them “more” out of their activities and life.

Try showcasing fishing as a way to change up an activity they are already partaking in (particularly more physically active ones—hiking/biking), to inject some exploration & excitement. **An app like FishBrain can be reframed around discovering a new trail, going off-the-beaten-path.**



Reinforce ***the adventure is in the journey and unknown of what you might find.*** Consider how we might take inspiration from Geocaching –where there are pop-ups or hidden treasures to discover with your family on the way to new fishing spots. Perhaps you earn more points for catching new fish/critters in the area as well.



Geocaching

Geocaching is a great way to explore South Dakota's state parks. This modern day treasure hunt can lead you to great surprises. Geocachers hide "treasures" in waterproof containers that typically include trinkets like key chains, small toys and buttons. The real reward is being able to find the caches.

The key here is **adding excitement or a challenge via gamification of the activity** (beyond catching a fish)—plus it offers the added bonus of connecting the experience to others and feeling uncertain/spontaneous.

Along the River - Gone Fishing!!!

A cache by Sheik318 [Mess](#)

Difficulty: ★★☆☆☆
Terrain: ★★☆☆☆

Types of Geocaching

There are other outdoor activities that share some of the same features as geocaching, but with a few differences. These include:

- **Letterboxing:** Enthusiasts of this hobby search for boxes hidden all over the world, using clues from letterboxing websites. Each box contains a stamp and inkpad, which the finder uses to stamp their logbook (like a passport). They then place an imprint from their personal stamp into the letterbox's logbook, recording their visit.
- **Waymarking:** Less time-consuming than geocaching or letterboxing, waymarking involves finding and sharing interesting locations around the world. Waymarkers may discover these places unexpectedly on a vacation, or they may realize that an attraction near their home is worth sharing with people in other parts of the world.

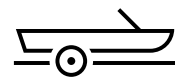
20%



Fishing and boating used to be a nice way for me to relax outdoors, but as time went on, I moved to a new city and circumstances changed. I've struggled to find locations near me that offer the same experiences. If I had guidance on local fishing and boating spots, like in neighborhood parks or ponds that aren't too far from home, I would be more inclined to leisurely engage in fishing and boating again.

I need guidance on places to fish and boat near me.

OVERALL



20%

% OF LAPSED ANGLERS



21%

% OF LAPSED BOATERS

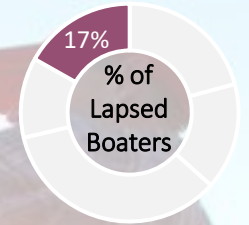
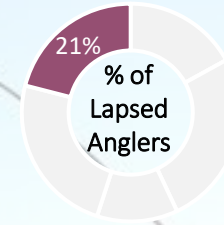
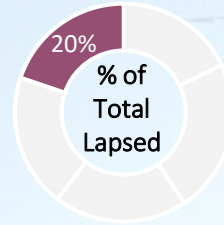


17%

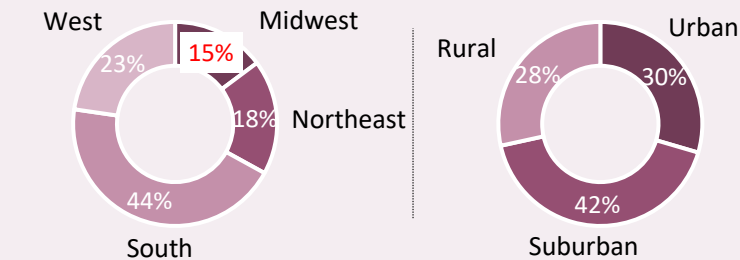
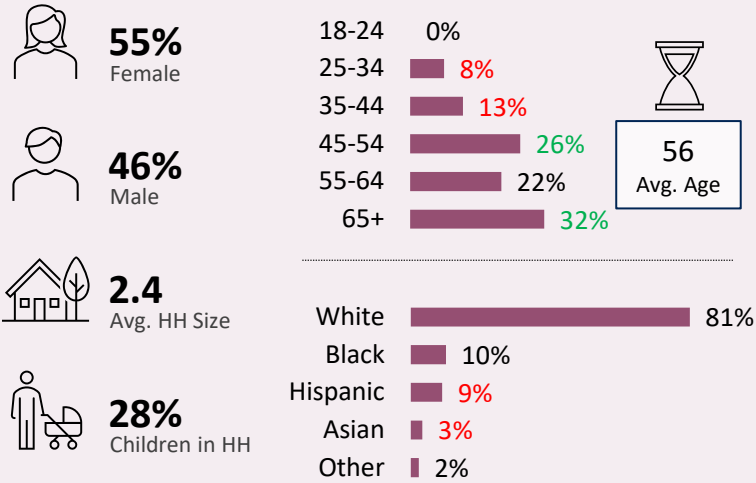


This persona consists of older Anglers and Boaters. Half of this group is made up of 'Leisure Time Enjoyers,' and they want to enjoy their leisure time **close to home**. Consider emphasizing in communications **various places to fish/boat**, including lesser-known spots, like community parks, ponds, etc.

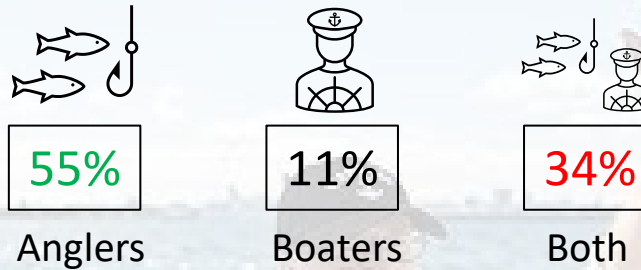
Geographical Support



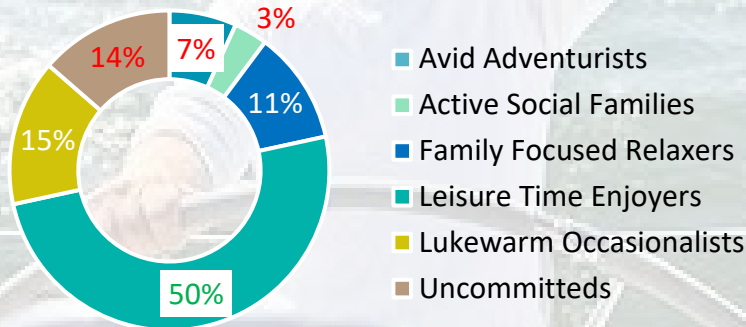
KEY DEMOGRAPHICS



PERSONA MAKEUP



CONSUMER SEGMENTS



MOST IMPACTFUL BARRIERS

Ranked High to Low
(Excluding Universal Barriers of Other Obligations and Time)

- O** I wanted to stay **closer to home** ↑
- O** I don't have **anyone to go with** ↑
- O** I don't have **who I used to go with**
- O** I had/have to **travel too far** ↑
- O** I didn't have access to the **equipment I need**
- O** I didn't feel **safe/comfortable** doing this alone ↑
- O** I don't know **where I can do this near me** ↑
- M** I prioritized **more physical activities**
- C** My **health wasn't allowing me to continue** ↑
- C** Equipment was **too expensive**

WHO THEY ARE: PERSONAL ENGAGEMENT AND IDENTITY

Despite this group's initial positive impressions of fishing and their moderate identity overlap with other Anglers, **their intermediate skill level implies the obstacles they encountered happened further along in their Angling journey.** These barriers, such as relocating and struggling to find new fishing locations, or wanting to stay closer to home, can be alleviated by **guiding them towards fishing spots that are local to them.**

FIRST IMPRESSIONS

ANGLERS

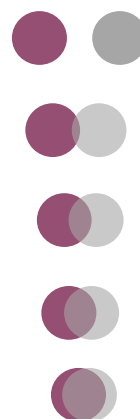
Relaxing	94%
Fun	91%
Easy to catch a fish	62%
Affordable	87%
Doesn't take too much time	78%

REASONS FOR TRYING

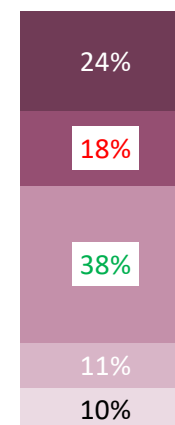
- ✓ Time outdoors
- ✓ Outlet to disconnect
- ✓ Good way to bond

IDENTITY OVERLAP

- No Overlap
- Little Overlap
- Moderate Overlap
- Strong Overlap
- Very Strong Overlap



ANGLERS



CESSATION MOMENT

ANGLERS



I moved from one state to another, so fishing was not as available."

Did not have a place to go fishing."

Had no one to go with, and don't really know the best area."

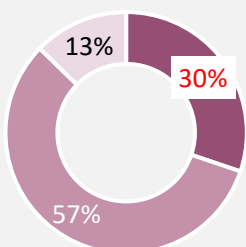
I no longer live on the water and don't have fishing tackle. My mobility and balance are poor and it is not easy to fish given these limitations. I spend more time working on jigsaw puzzles, reading, and playing computer games."

I didn't want to travel last year and stayed close to home."

SKILL LEVEL

AVG. PARTICIPATION

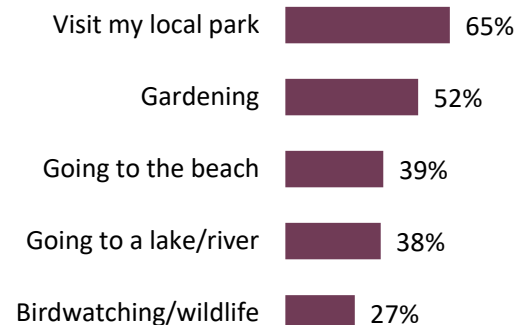
- Beginner
- Intermediate
- Advanced



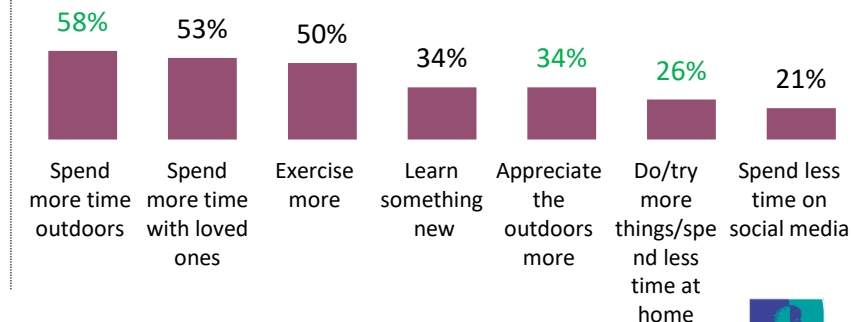
19%
Participated 1 Day;
49%
Participated More than 5 days

OTHER
OUTDOOR
ACTIVITIES

2.9
Mean #



KEY PERSONAL GOALS



TAILWINDS

ANGLERS

Community & Mentors



- Someone to go with
- Local fishing club or community
- In person meet-ups



- Guidance on places near me
- Guidance on types of bait needed for certain fish



Nostalgia Proneness: 2.9

PRIORITY CHANNELS



53%

Streaming platforms



52%

Videos online



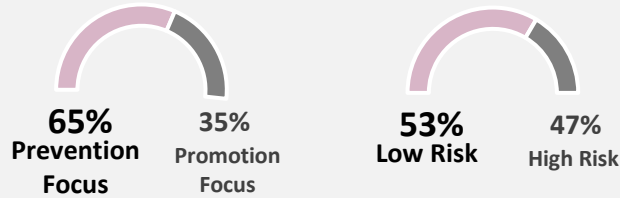
47%

Cable network television

Base: Geographical Support (n=88), Anglers (n=63)
Multiple Questions: Q16A, Q27, Q28, Q29, Q17, Q18

Green / Red Font Based on Significantly High / Low Index Compared to Total Average/Total (Green > 120, Red < 80); Indexing reported if Total Average/Total = 5%+

KEY BESCİ MINDSETS



ALIGNING ACTIVATION TO INSIGHTS

This group has the lowest propensity for risk (they prefer to stick with what they know) and also are the most prevention-focused in choosing activities. **They want options that help them avoid or reduce stress.** They also prefer to feel more in control of the details of the activity and **have the highest concern for safety (75%).**

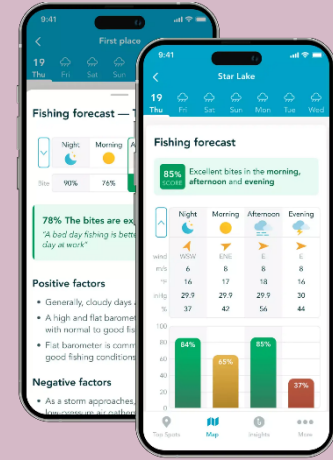
Taking these factors together, ensure it is not only easy for them to **find a local fishing spot** (maybe even just a small pond in their neighborhood or down the street—it need not be overly exciting or thrilling) but that we clearly help them understand **what to expect when they get there so they feel in control of their safety and less stressed about the details— “how” it will go.**

When applicable, highlight how guidance is available via park rangers, local club/community events, etc.



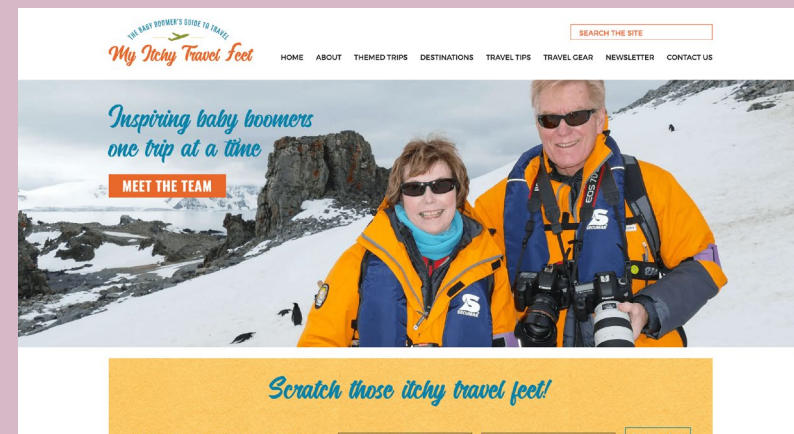
Offer/enhance local spot tools by providing details around:

- Where to park close by.
- Seating available or not.
- Incline/slope/ease of walking trail or type.
- Availability of support/experts/gear close by.
- Safety ratings or even popular times to go so they won't be alone.

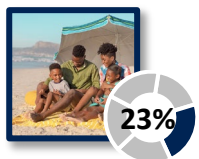


Fishbox App

For those who truly do not live close to convenient fishing/boating spots consider instead targeted messaging around vacation related opportunities— especially for closer regional trips. These types of excursions often come with someone else to safely guide you—again, offer them concrete details about what to expect to reduce uncertainty (risk) and enhance control.



While each persona can be found across the US, there is a living pattern that emerges. Compared to the other personas, the ‘An Enthusiastic Buddy’ persona is more likely to live in the **Midwest**, the ‘More Interest’ persona is more likely to live in the **South Atlantic**, the ‘Affordable Access’ persona is more likely to live in the **Mid-Atlantic**, the ‘More Adrenaline’ persona is more likely to live in the **Pacific and West South**, and the ‘Geographical Support’ persona lives across all regions. Coupling their locations with their unique barriers allows for even more pinpointed targeting.



AN ENTHUSIASTIC BUDDY

MORE INTEREST

AFFORDABLE ACCESS

MORE ADRENALINE

GEOGRAPHICAL SUPPORT

Geo Area		AN ENTHUSIASTIC BUDDY	MORE INTEREST	AFFORDABLE ACCESS	MORE ADRENALINE	GEOGRAPHICAL SUPPORT
	Urban	25%	33%	26%	32%	30%
	Suburban	57%	43%	48%	40%	42%
	Rural	16%	22%	26%	28%	28%
Region		AN ENTHUSIASTIC BUDDY	MORE INTEREST	AFFORDABLE ACCESS	MORE ADRENALINE	GEOGRAPHICAL SUPPORT
Northeast	New England	5%	3%	2%	1%	3%
	Middle Atlantic	8%	14%	21%	12%	15%
Midwest	East North Central	22%	10%	16%	12%	9%
	West North Central	11%	2%	8%	5%	6%
South	South Atlantic	17%	29%	15%	17%	24%
	East South Central	8%	7%	7%	6%	9%
	West South Central	11%	10%	13%	18%	11%
West	Mountain	5%	10%	7%	7%	8%
	Pacific	13%	17%	13%	23%	15%

Green / Red Font Based on Significantly High / Low Index Compared to Total Average/Total (Green > 120, Red < 80); Indexing reported if Total Average/Total = 5%+

New England: Connecticut, Maine, Massachusetts, New Hampshire, Rhode Island, Vermont; Middle Atlantic: New Jersey, New York, Pennsylvania; East North Central: Illinois, Indiana, Michigan, Ohio, Wisconsin; West North Central: Iowa, Kansas, Minnesota, Missouri, Nebraska, North Dakota, South Dakota; South Atlantic: Delaware, Florida, Georgia, Maryland, North Carolina, South Carolina, Virginia, Washington DC, West Virginia; East South Central: Alabama, Kentucky, Mississippi, Tennessee; West South Central: Arkansas, Louisiana, Oklahoma, Texas; Mountain: Arizona, Colorado, Idaho, Montana, Nevada, New Mexico, Utah, Wyoming;

THANK YOU!



Rachel Kelley

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Stephanie Don

Vice President, Market Strat. & Understanding
Long Island, NY

Stephanie.Don@ipsos.com



Sarah Mittal, Ph.D.

Director, Behavioral Science Center
Austin, TX

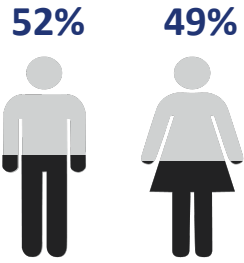
Sarah.Mittal@ipsos.com

APPENDIX

Additional Details

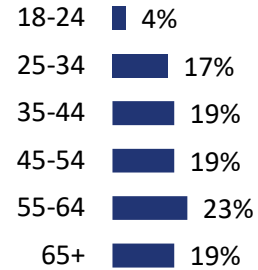


GENDER



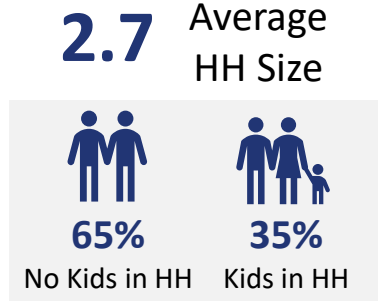
10%
Active
Outdoors
Woman

AGE

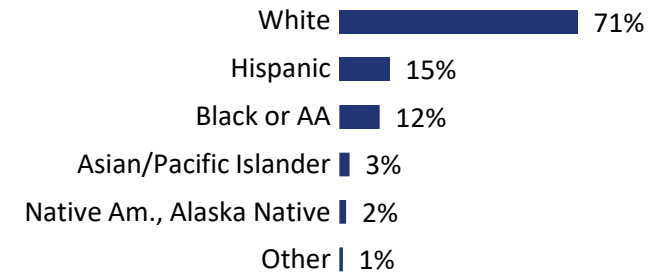


50
Average
Age

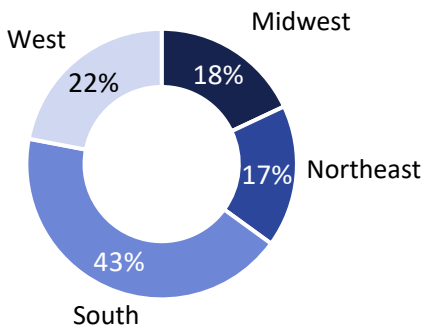
HH COMPOSITION



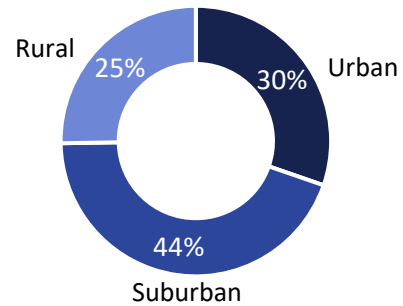
ETHNICITY



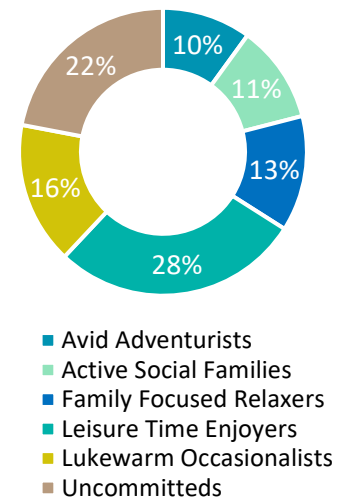
REGION



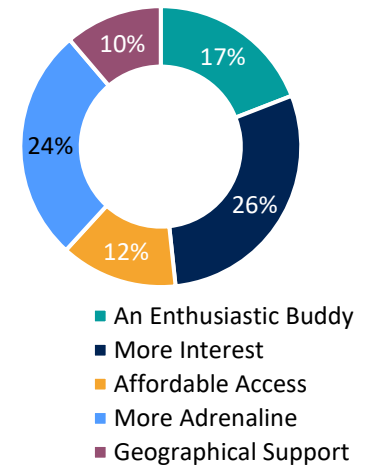
GEO AREA



SEGMENTS

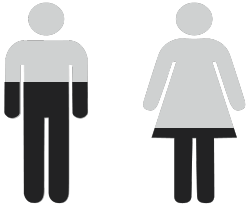


PERSONAS



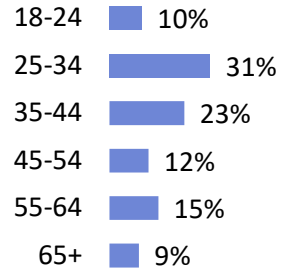
GENDER

60% 40%



30%
Active
Outdoors
Woman

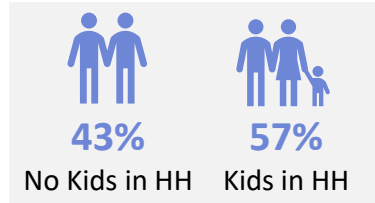
AGE



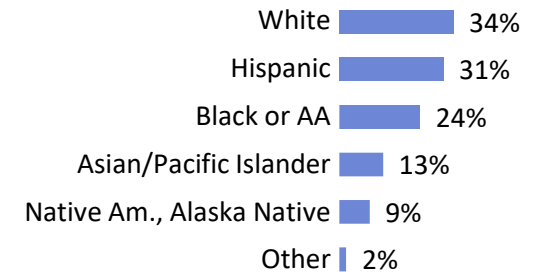
42
Average
Age

HH COMPOSITION

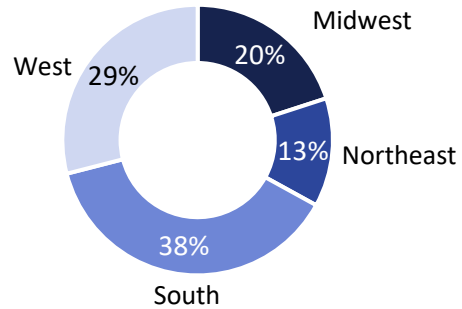
3.4 Average
HH Size



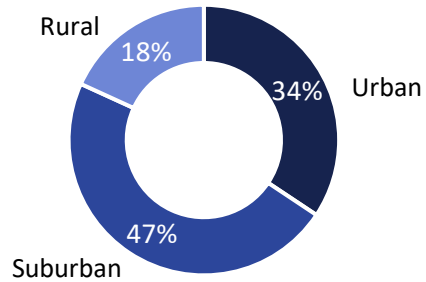
ETHNICITY



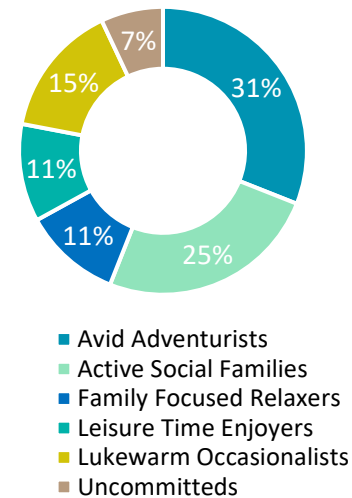
REGION



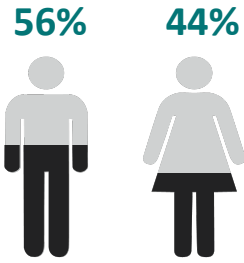
GEO AREA



SEGMENTS

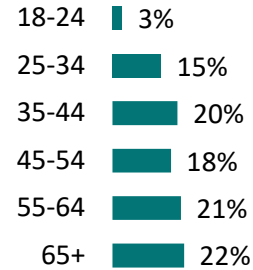


GENDER



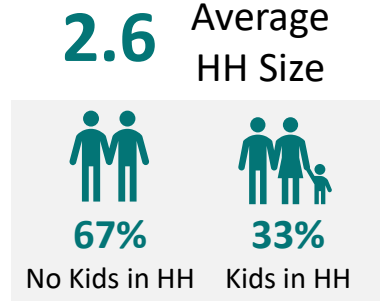
9%
Active
Outdoors
Woman

AGE

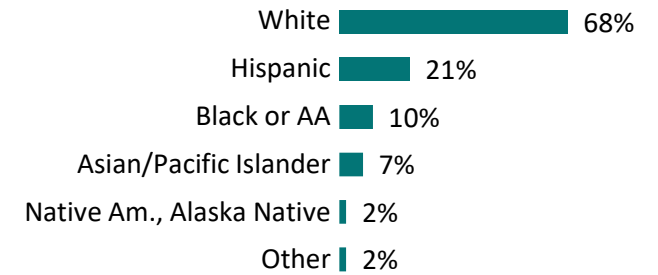


51
Average
Age

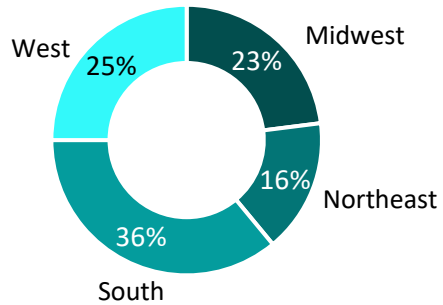
HH COMPOSITION



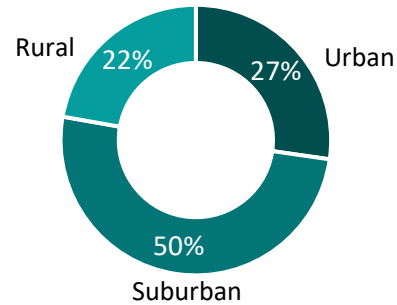
ETHNICITY



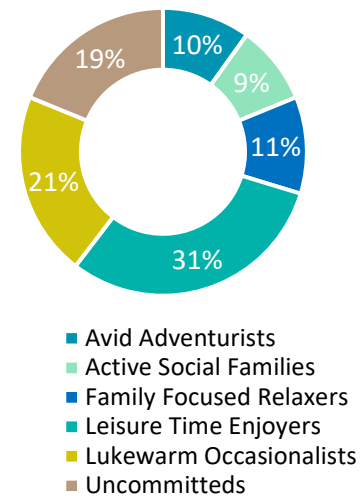
REGION



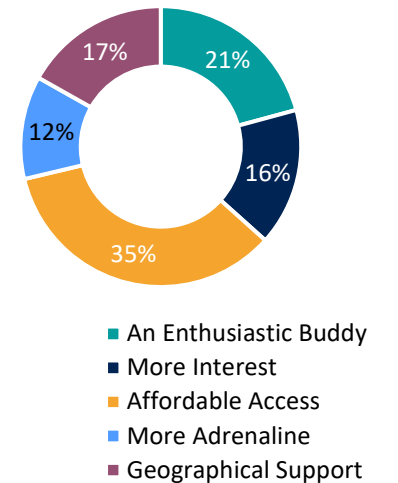
GEO AREA



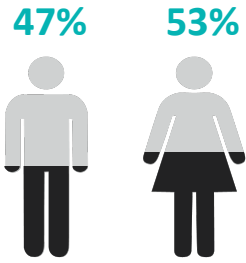
SEGMENTS



PERSONAS

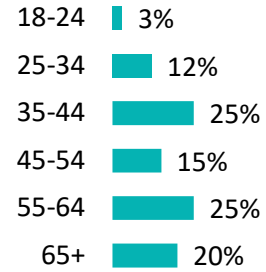


GENDER



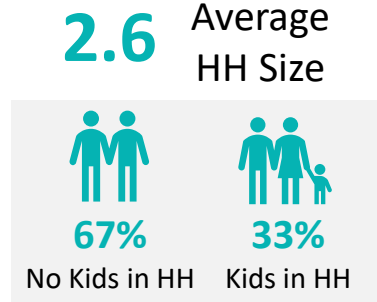
30%
Active
Outdoors
Woman

AGE

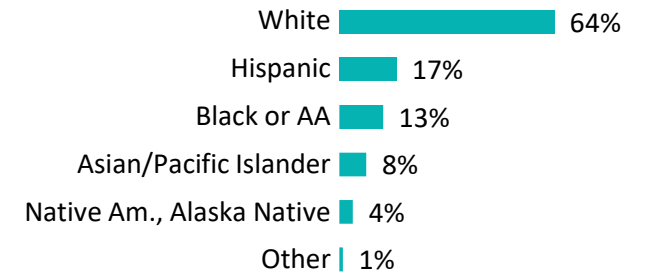


51
Average
Age

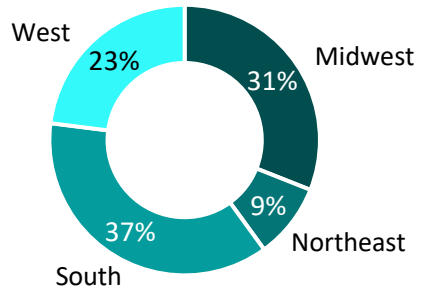
HH COMPOSITION



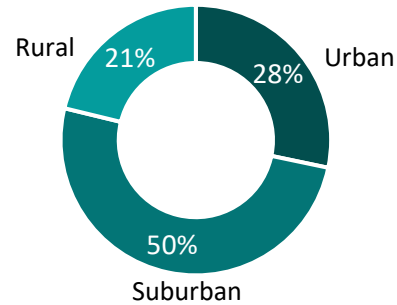
ETHNICITY



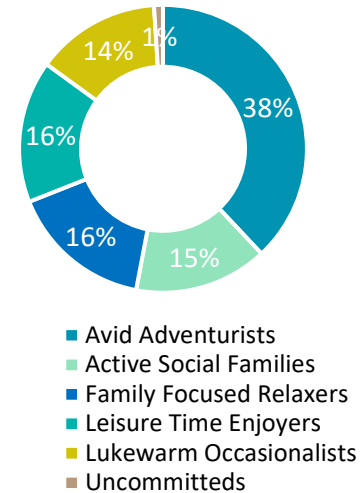
REGION



GEO AREA

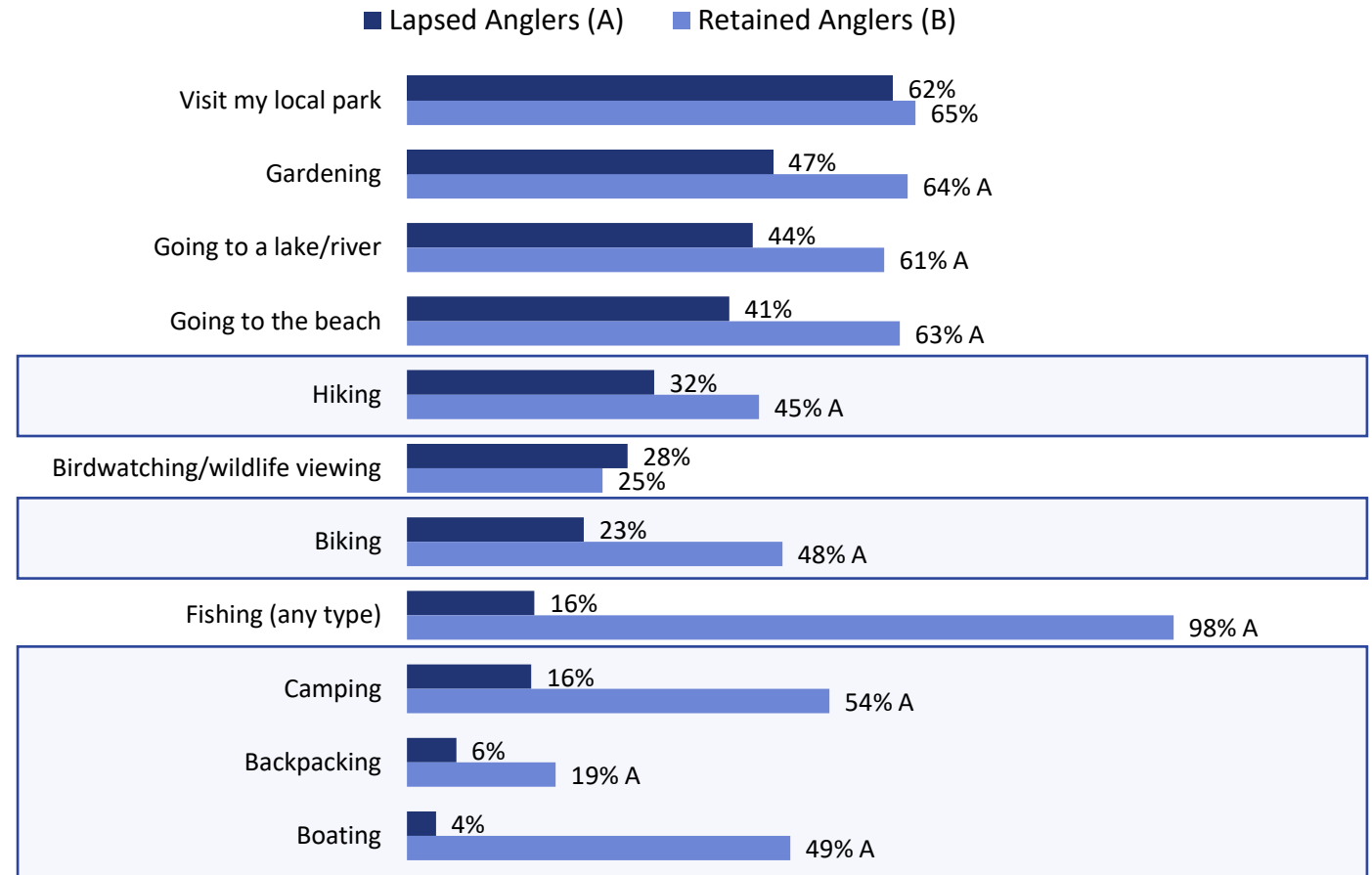


SEGMENTS



Retained Anglers have participated in a greater number of outdoor activities compared to Lapsed Anglers, including more outdoor **adventure activities** like hiking, biking, camping, backpacking, and boating, suggesting a greater proclivity for the outdoors.

TOP 10 PAST YEAR OUTDOOR ACTIVITIES

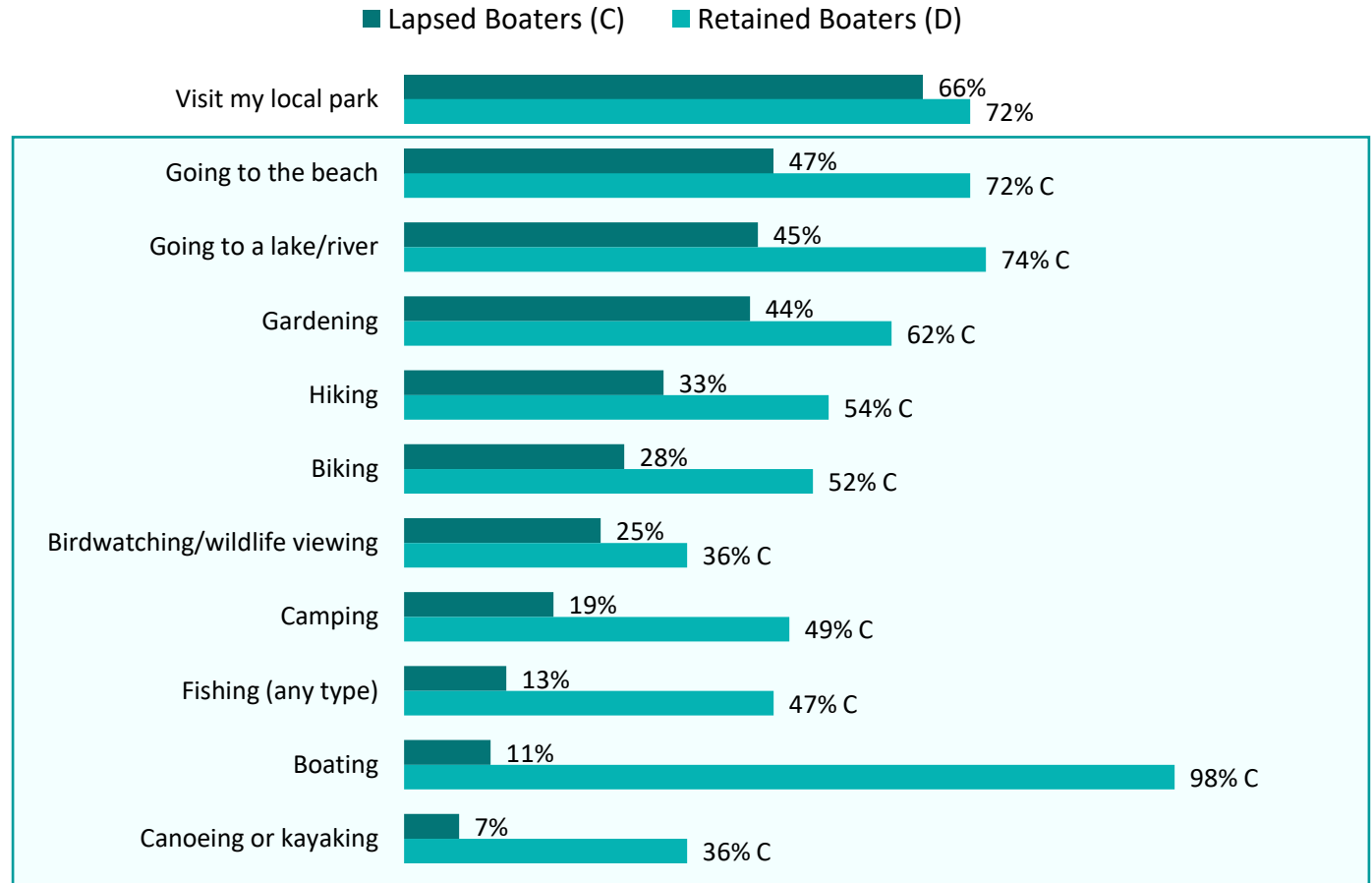


Average # of Activities Selected **Lapsed Anglers: 3** **Retained Anglers: 7**

Base: Total Lapsed Anglers (n=301); Total Retained Anglers (n=100)
 Q2a. Which of the following outdoor activities, if any, have you participated in in the past year?
 Letters indicate a significant difference at the 90% confidence level: A/B

Likewise, across the board, **Retained Boaters participate in more outdoor activities** compared to Lapsed Boaters.

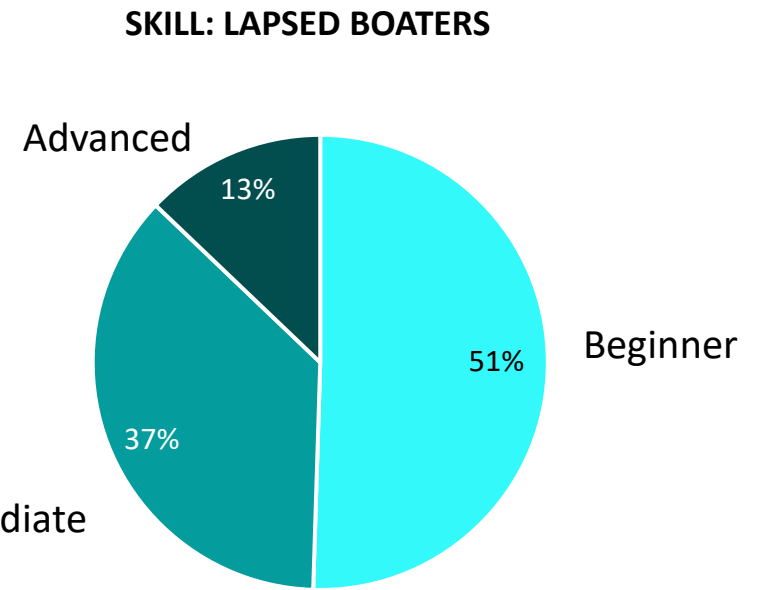
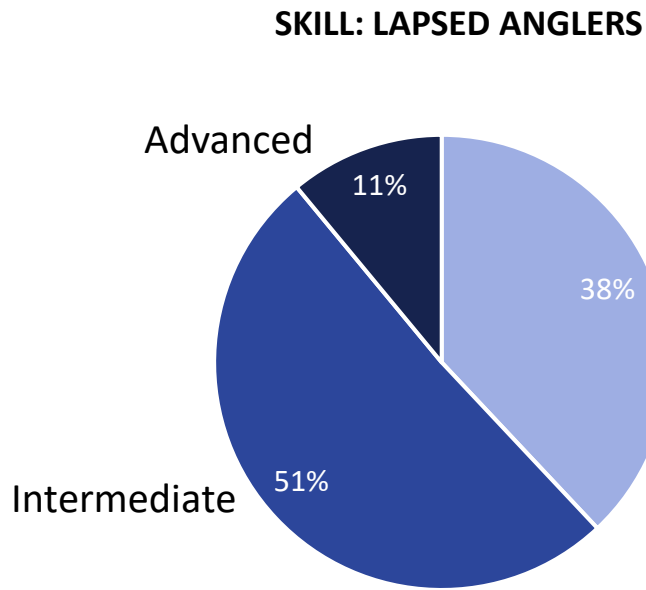
TOP 10 PAST YEAR OUTDOOR ACTIVITIES



Average # of Activities Selected **Lapsed Boaters: 4** **Retained Boaters: 7**

Base: Total Lapsed Anglers (n=301); Total Retained Anglers (n=100)
 Q2a. Which of the following outdoor activities, if any, have you participated in in the past year?
 Letters indicate a significant difference at the 90% confidence level: A/B

Lapsed Anglers and Boaters are more likely to have been **beginner or intermediate skill-level** than advanced. Interestingly, Lapsed Boaters are more likely than Anglers to be **beginners**, potentially attributed to the equipment-related cost and accessibility barriers that all Boaters encounter up-front.



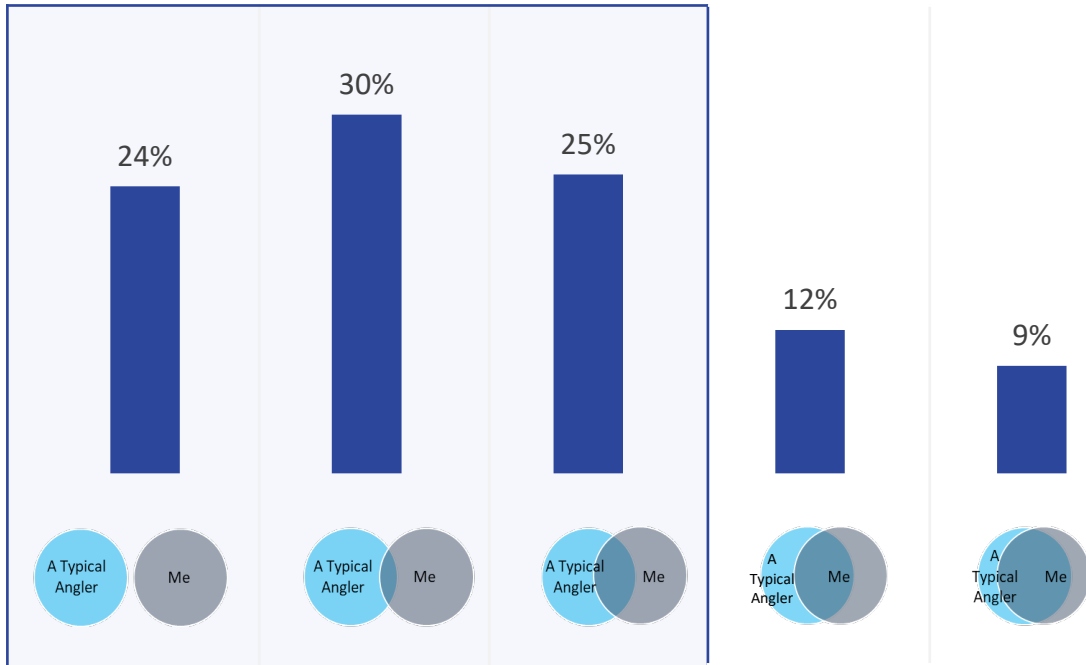
Beginner

Intermediate

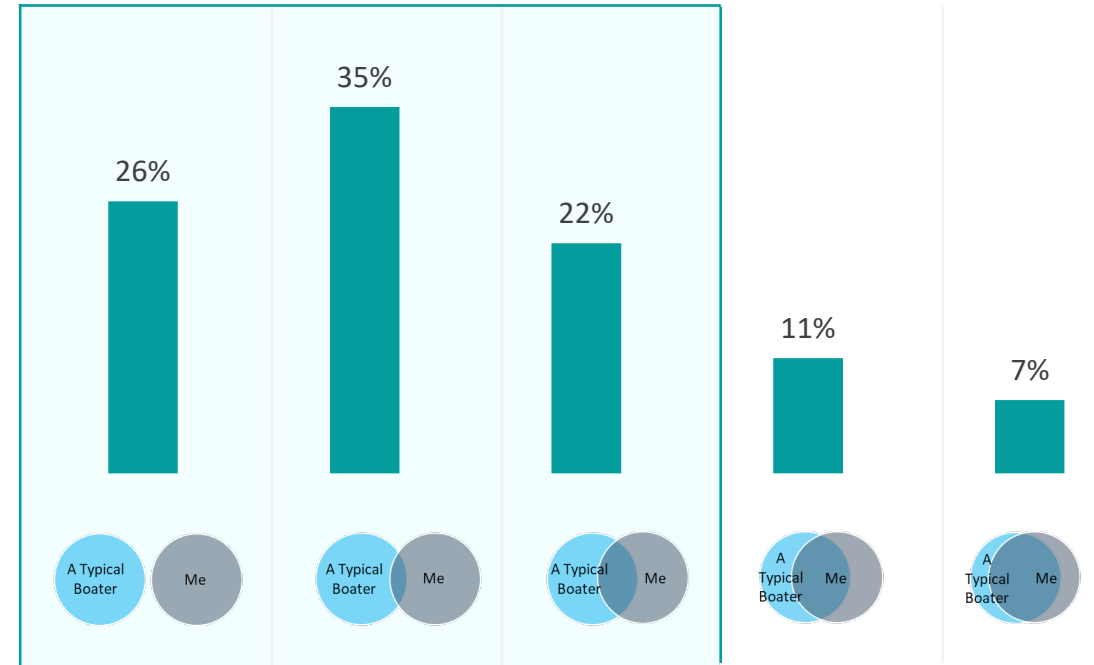
*Unsurprisingly, both **Retained Anglers** and **Retained Boaters** are more likely to rate themselves as “advanced” compared to those who have lapsed.*

Majority of Lapsed Anglers and Boaters alike believe **the life and values of a typical Angler/Boater align halfway or less with their own**. Nearly a **quarter of Lapsed Anglers and Boaters do not believe there is any overlap** between the life and values of a typical Angler/Boater and themselves.

VALUE OVERLAP: LAPSED ANGLERS



VALUE OVERLAP: LAPSED BOATERS

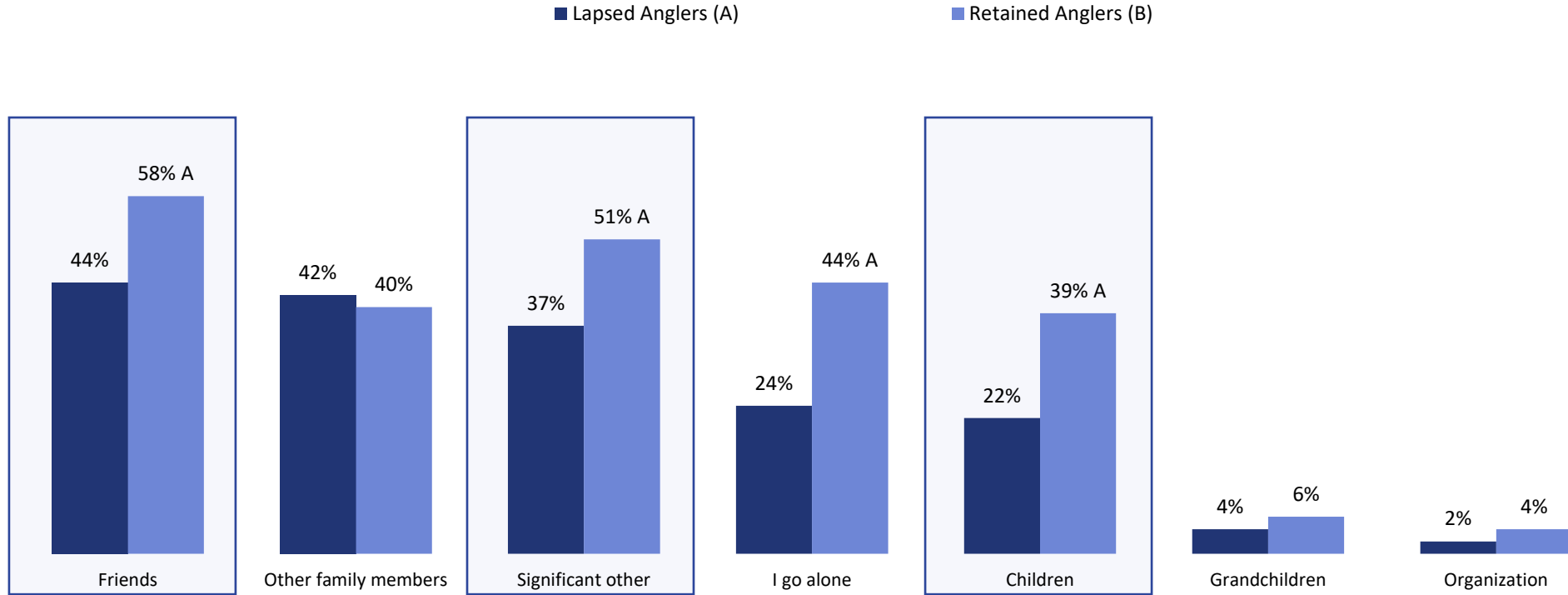


Base: Total Lapsed Anglers (n=301); Total Lapsed Boaters (n=150)

Q12/Q13. Please select the set of circles that best describe the extent that your values & life overlap with those of a typical [angler/boater]. The more you believe the life & values of a typical [angler/boater] are like your own, the more overlapped the two circles should be and vice versa.

While fishing can be viewed as more of a solo sport, **Retained Anglers are more likely to have a variety of people they go fishing with**, including friends, significant others, and children.

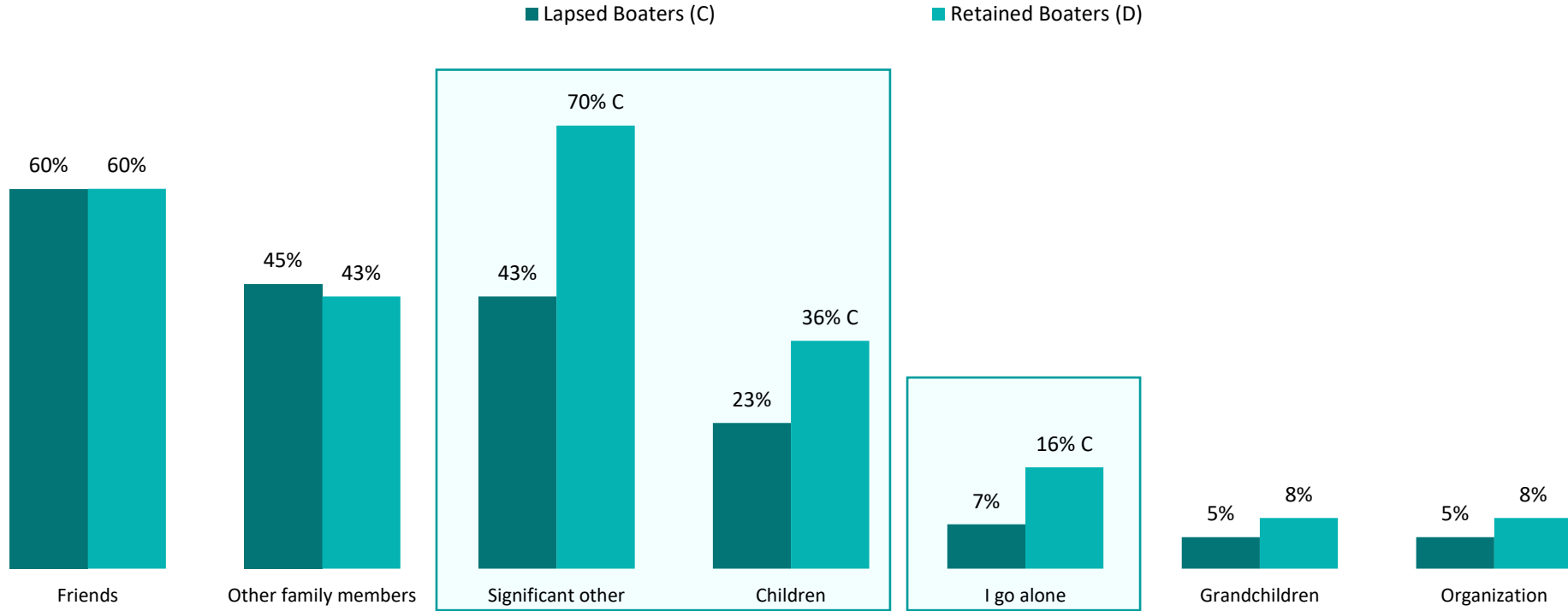
WITH WHOM



Base: Total Lapsed Anglers (n=301); Total Retained Anglers (n=100)
 Q7. When you do the following activities, who would you typically do each with?
 Letters indicate a significant difference at the 90% confidence level: A/B

Retained Boaters are overwhelmingly more likely than Lapsed to have a **significant other** or **children that they boat with**. They also are more likely to **go alone**, which makes sense given their more advanced expertise-level.

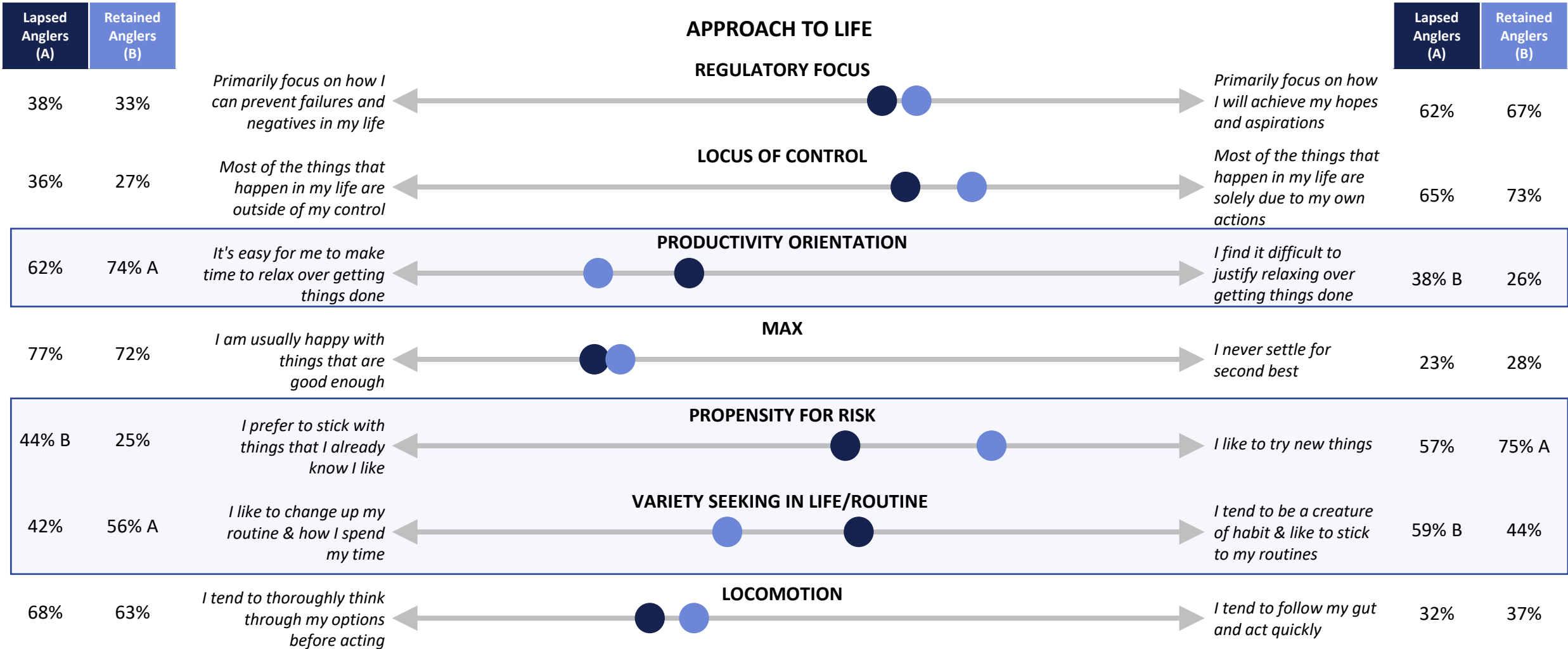
WITH WHOM



Base: Total Lapsed Boaters (n=150); Total Retained Boaters (n=100)
 Q7. When you do the following activities, who would you typically do each with?
 Letters indicate a significant difference at the 90% confidence level: A/B



Compared to those who have Lapsed, **Retained Anglers find it easier to make time to relax, like trying new things, and like to change up their routine.** Consider meeting Lapsed Anglers where they are at; communicate ways in which Fishing is “productive” (i.e., it allows you to spend quality time with loved ones, etc.)



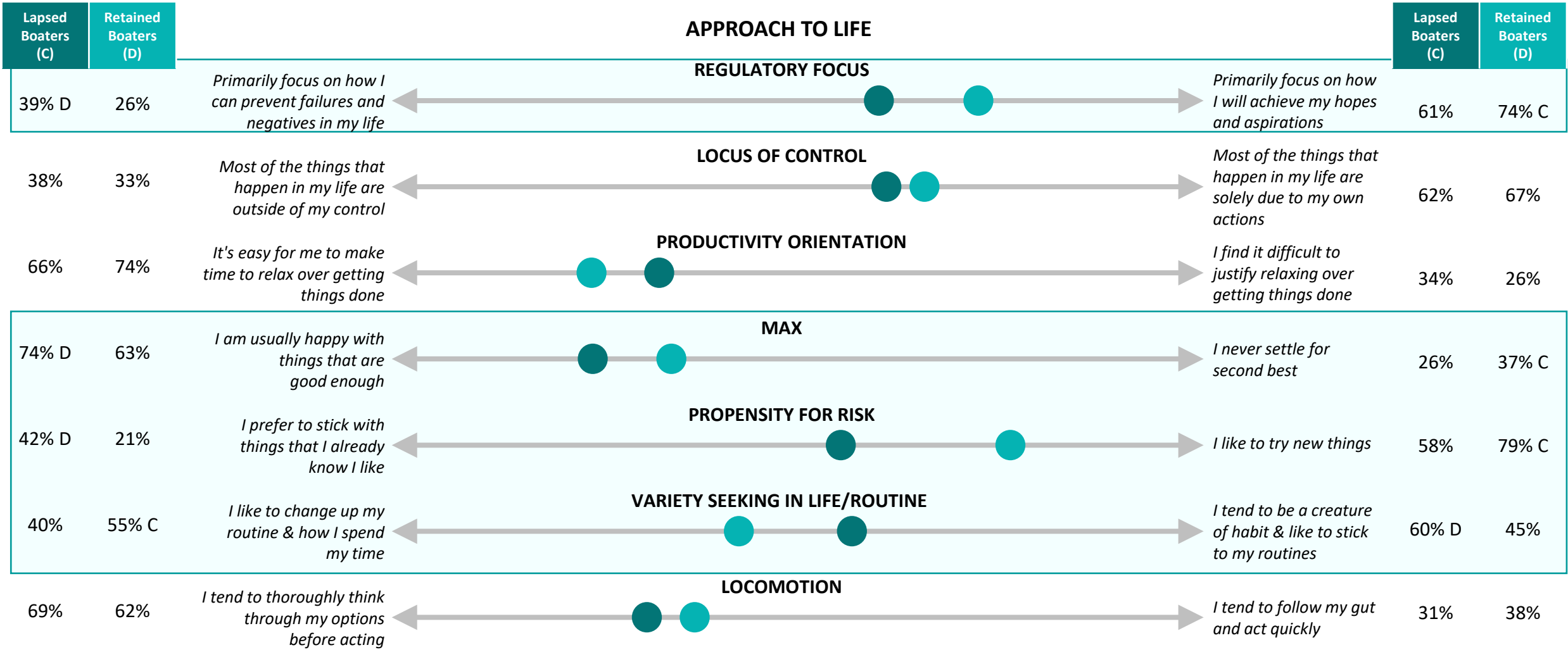
Base: Total Lapsed Anglers (n=301); Total Retained Anglers (n=100)

Q17. Now we'd like to ask you about your general approach to life. You will be shown a set of paired statements. For each pair, please select the one that best describes how you generally approach life.

Letters indicate a significant difference at the 90% confidence level: A/B

● Lapsed Anglers
● Retained Anglers

Compared to those who have Lapsed, **Retained Boaters are more promotion-focused, like trying new things, and like to change up their routine.** Lapsed boaters are also more likely to satisfice and simply stick to what they know. Consider ways to tie boating to the things they already like and enjoy, familiarity might help them warm up to boating easier and see how it fits into their current goals and habits.

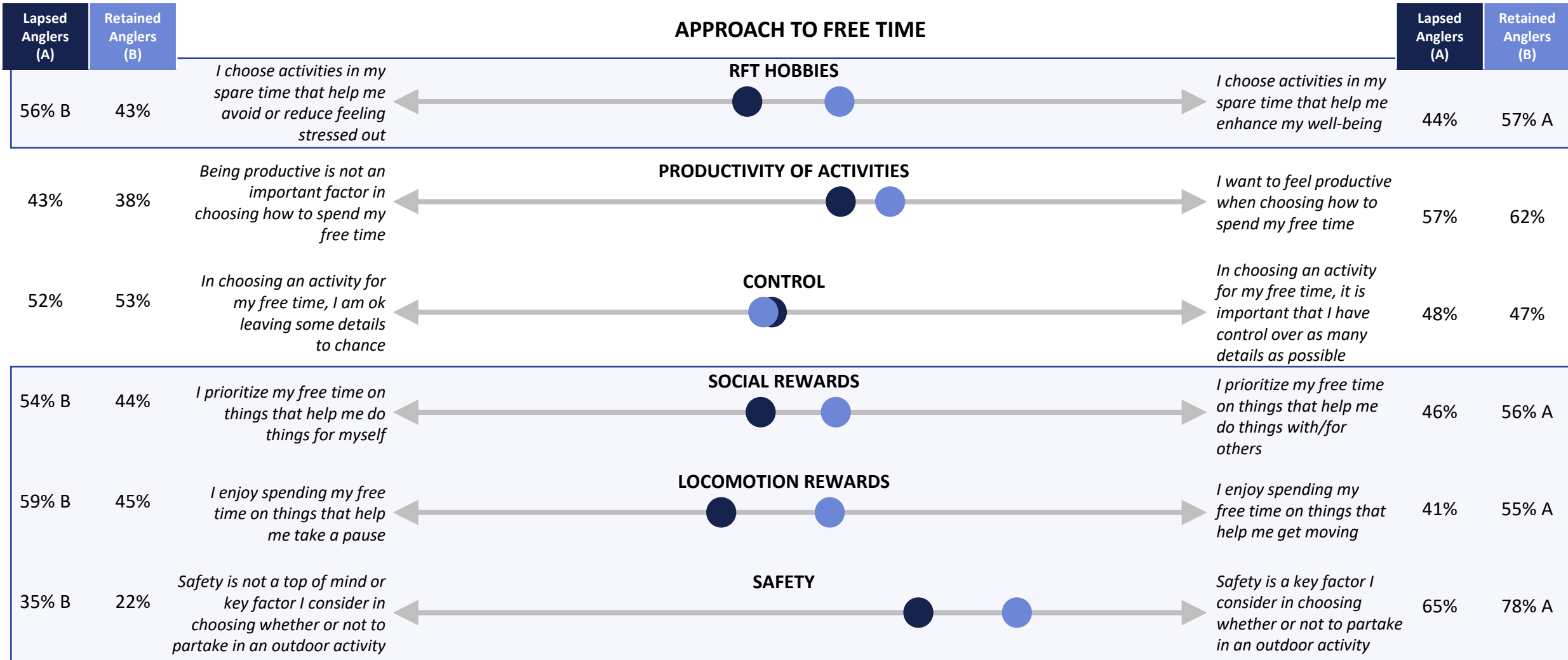


Base: Total Lapsed Boaters (n=150); Total Retained Boaters (n=100)

Q17. Now we'd like to ask you about your general approach to life. You will be shown a set of paired statements. For each pair, please select the one that best describes how you generally approach life.

Letters indicate a significant difference at the 90% confidence level: C/D

● Lapsed Boaters
● Retained Boaters

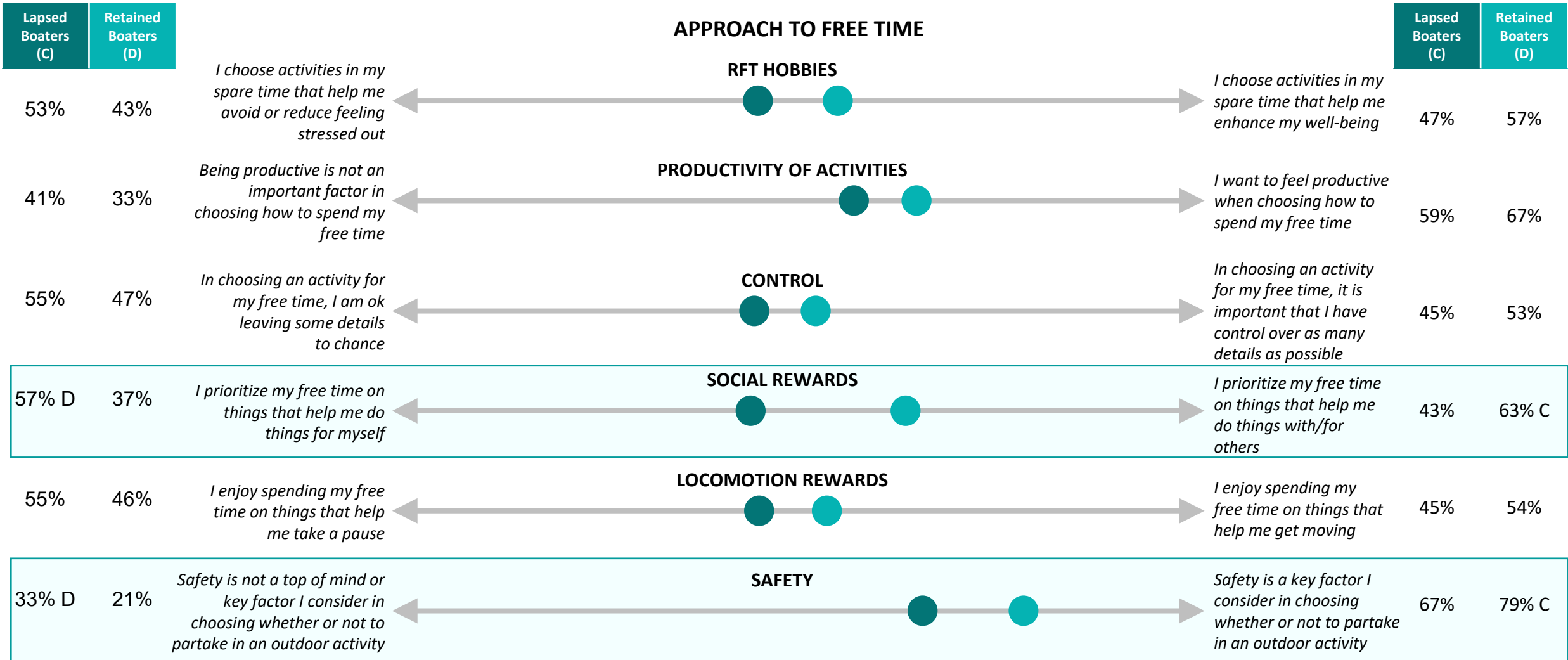


Base: Total Lapsed Anglers (n=301); Total Retained Anglers (n=100)

Q18. Next, we'd like to ask you about how you use your free time. You will be shown a set of paired statements. For each pair, please select the one that best describes how you generally approach spending your time.

Letters indicate a significant difference at the 90% confidence level: A/B

● Lapsed Anglers
● Retained Anglers



Base: Total Lapsed Boaters (n=150); Total Retained Boaters (n=100)

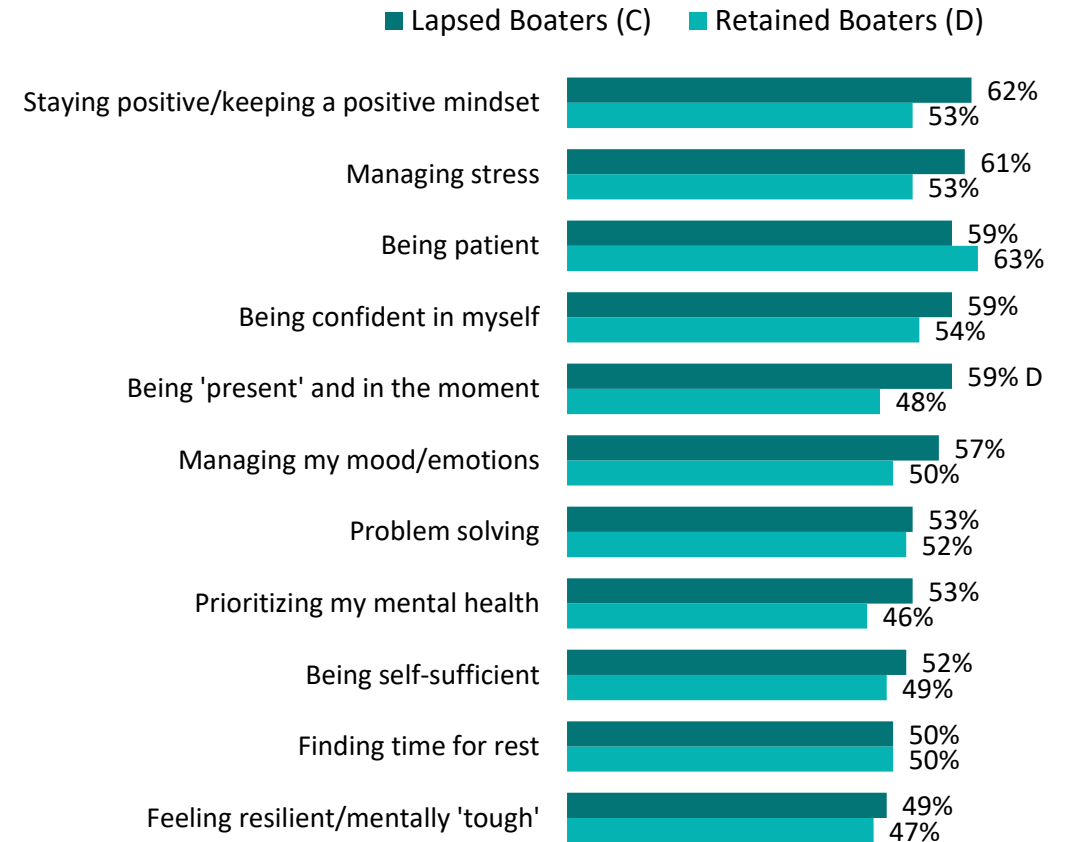
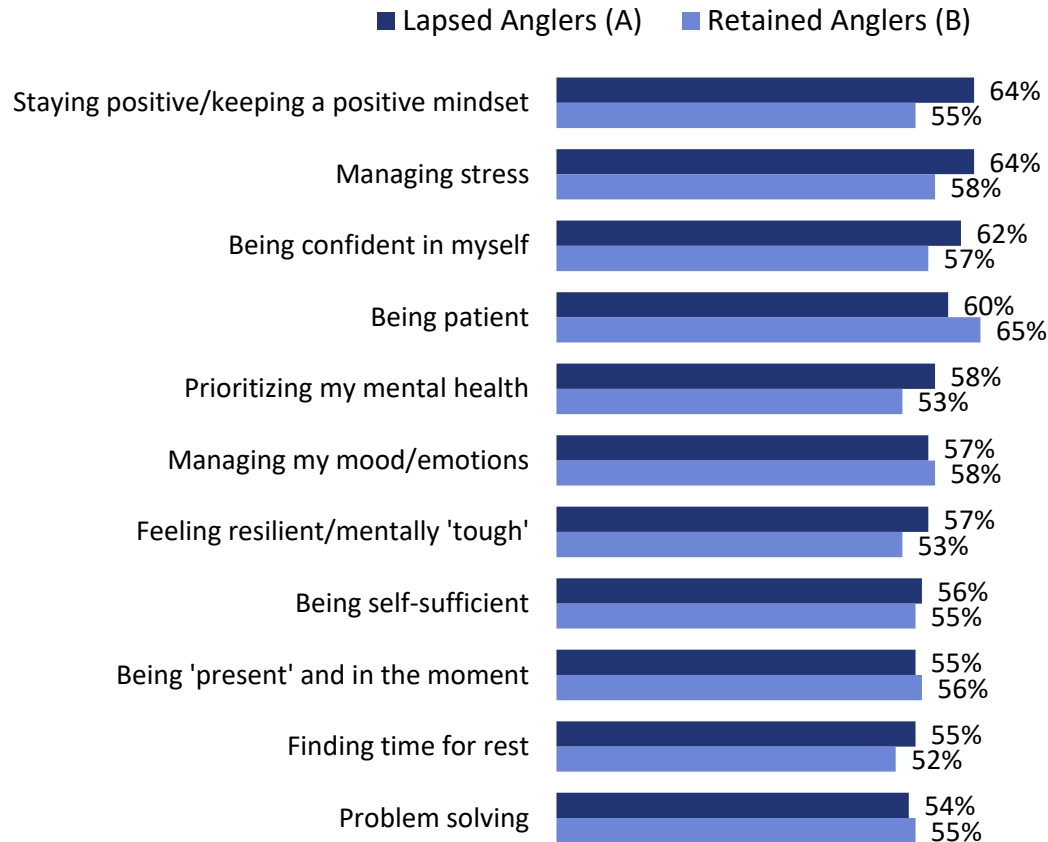
Q18. Next, we'd like to ask you about how you use your free time. You will be shown a set of paired statements. For each pair, please select the one that best describes how you generally approach spending your time.

Letters indicate a significant difference at the 90% confidence level: C/D

● Lapsed Boaters
● Retained Boaters

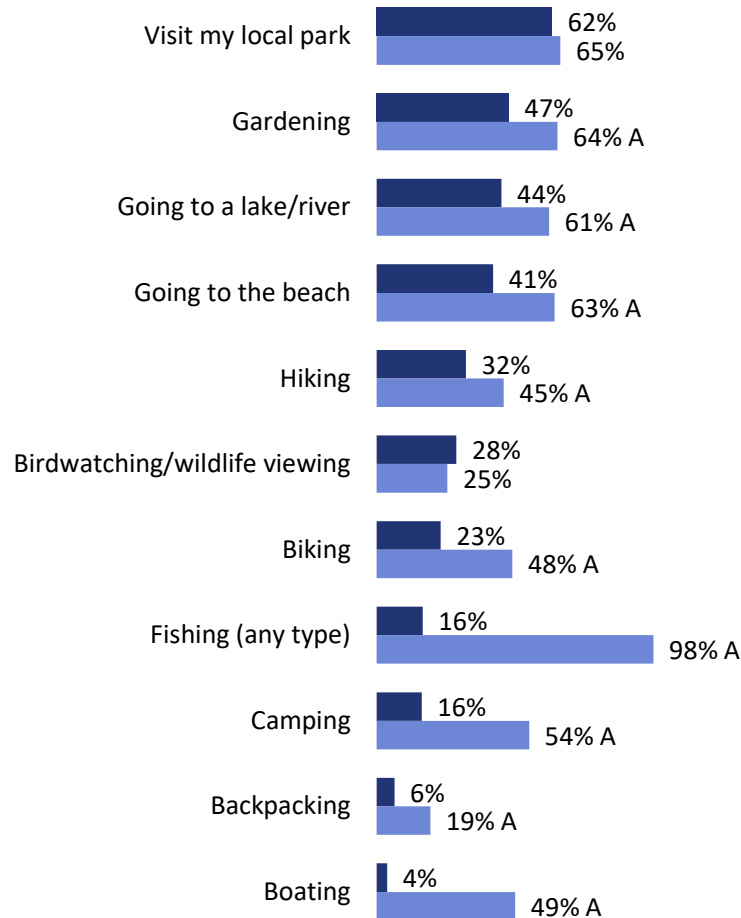


% Want To Be Better

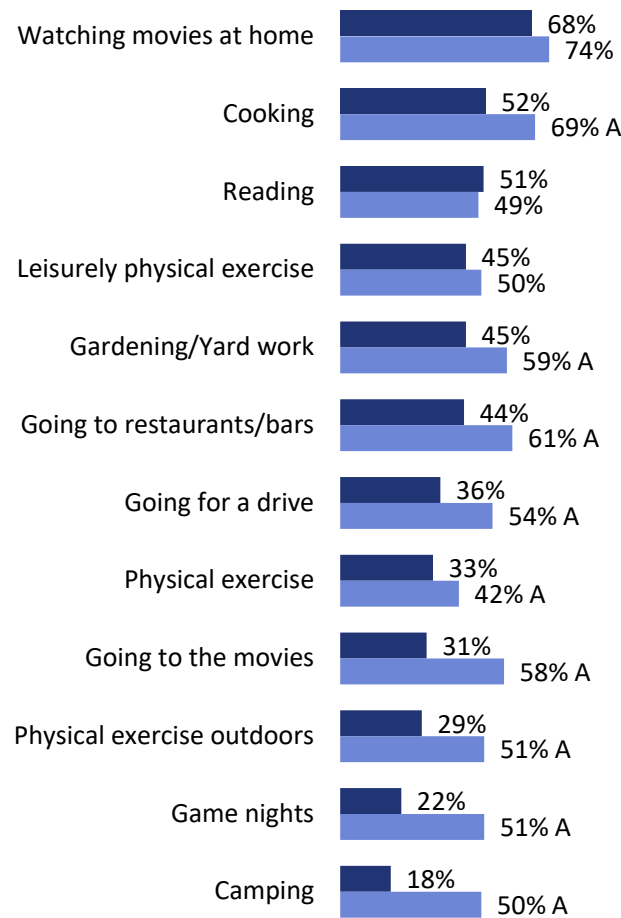


Base: Total Lapsed Anglers (n=301); Total Retained Anglers (n=100), Total Lapsed Boaters (n=150); Total Retained Boaters (n=100)
 Q25. For each of the following topics, tell us how it applies to you personally.
 Letters indicate a significant difference at the 90% confidence level: A/B, C/D

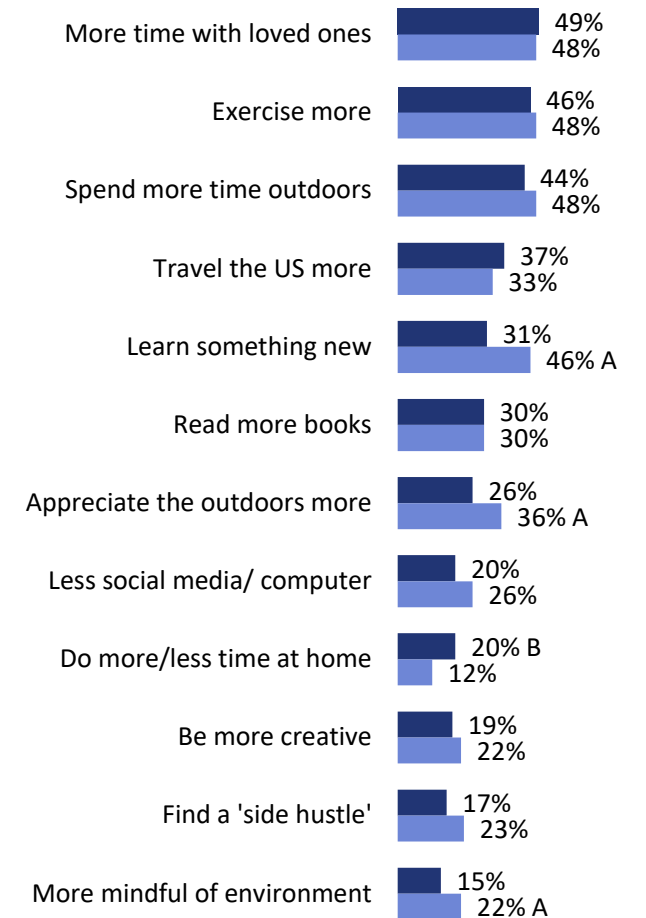
TOP 10 PAST YEAR OUTDOOR ACTIVITIES



TOP 10 ACTIVITIES ENGAGE IN FREE TIME



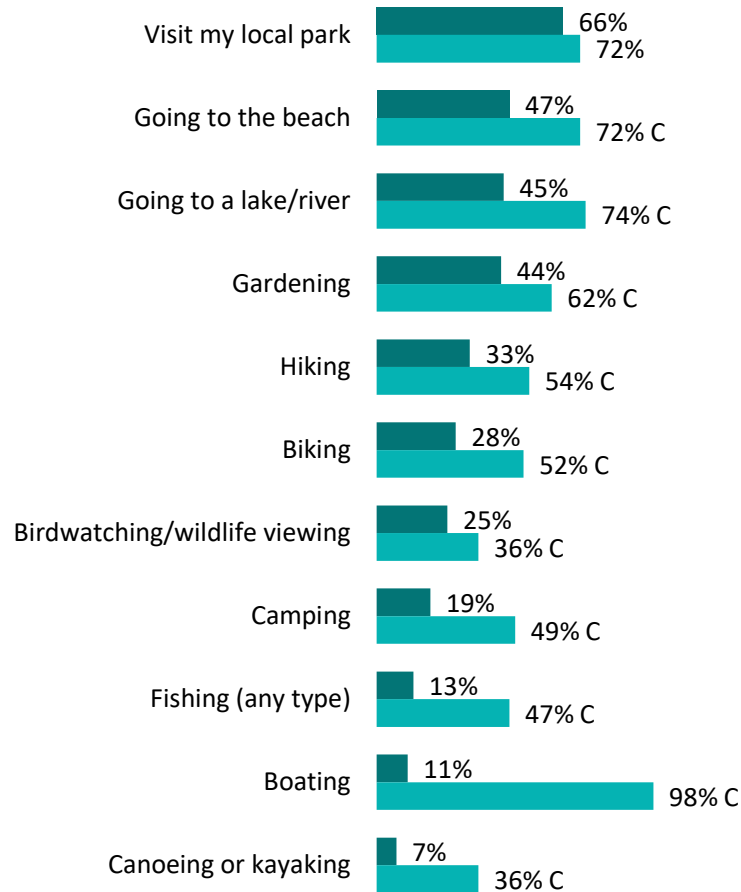
TOP 10 PERSONAL GOALS



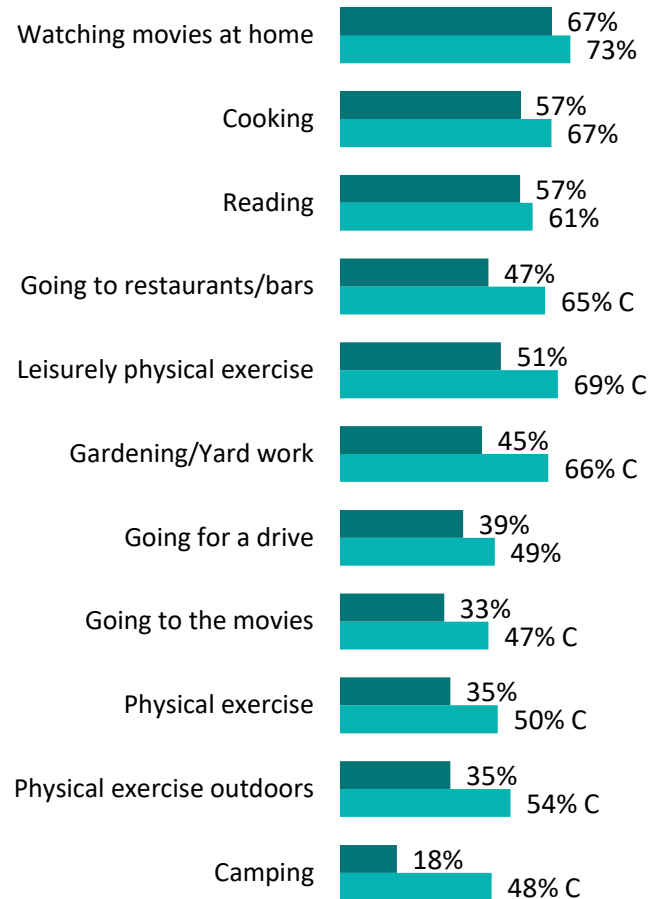
Base: Total Lapsed Anglers (n=301); Total Retained Anglers (n=100)
 Multiple Questions: Q2a, Q20, Q24
 Letters indicate a significant difference at the 90% confidence level: A/B

■ Lapsed Anglers (A) ■ Retained Anglers (B)

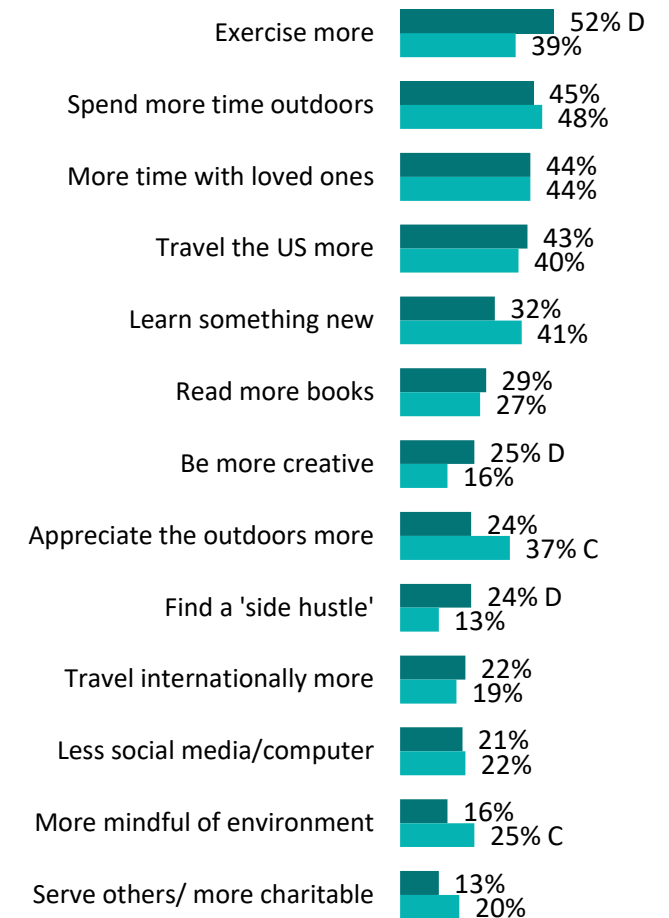
TOP 10 PAST YEAR OUTDOOR ACTIVITIES



TOP 10 ACTIVITIES ENGAGE IN FREE TIME



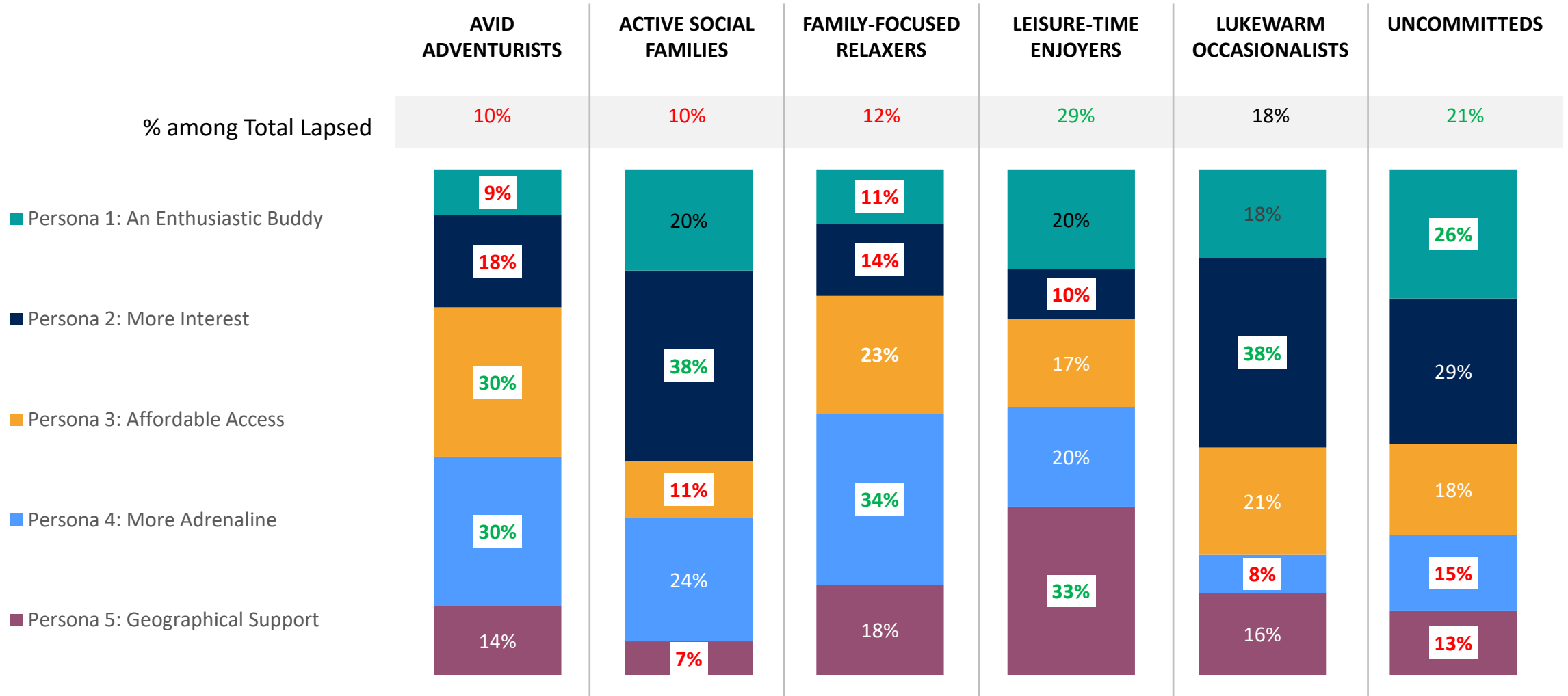
TOP 10 PERSONAL GOALS



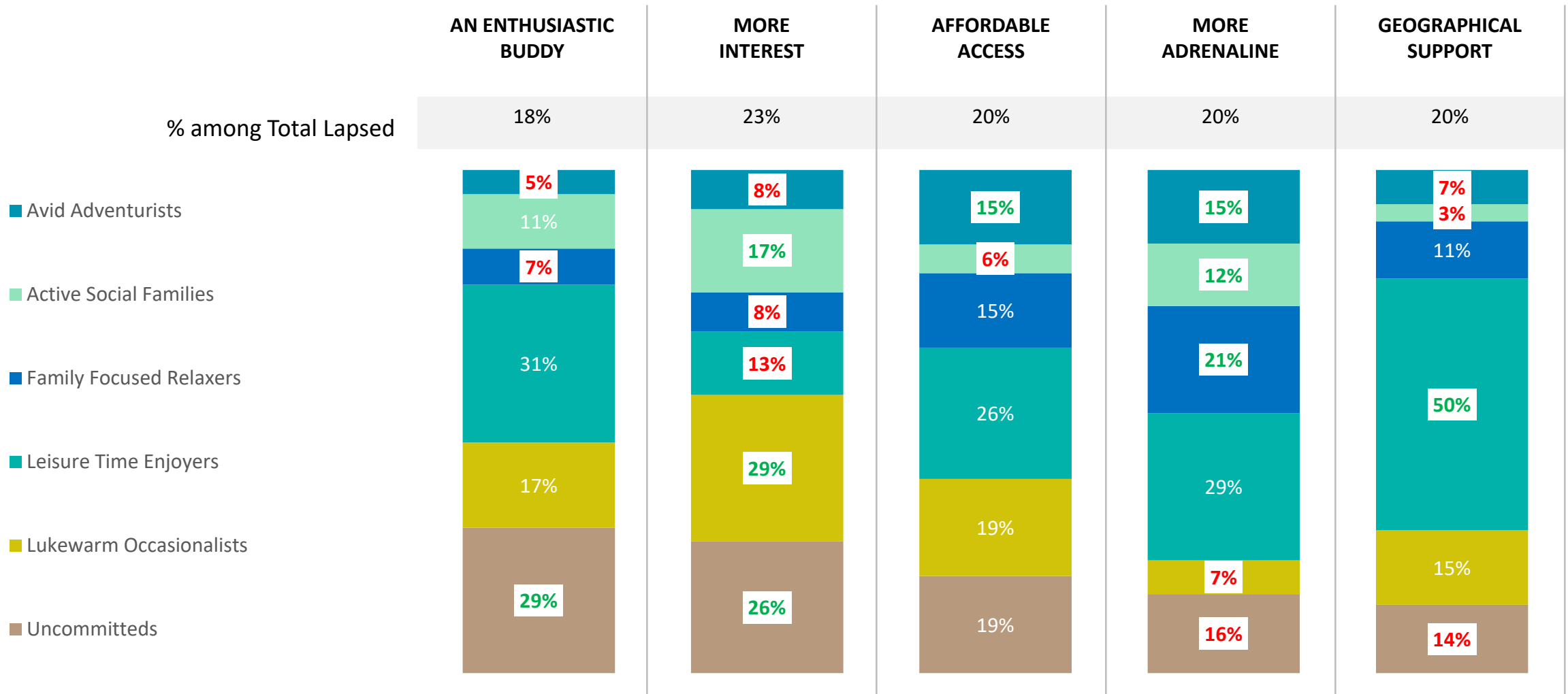
Base: Total Lapsed Boaters (n=150); Total Retained Boaters (n=100)
 Multiple Questions: Q2a, Q20, Q24
 Letters indicate a significant difference at the 90% confidence level: C/D

■ Lapsed Boaters (C) ■ Retained Boaters (D)

PERSONA DISTRIBUTION PER SEGMENT



Green = over index vs Total; Red = under index vs Total

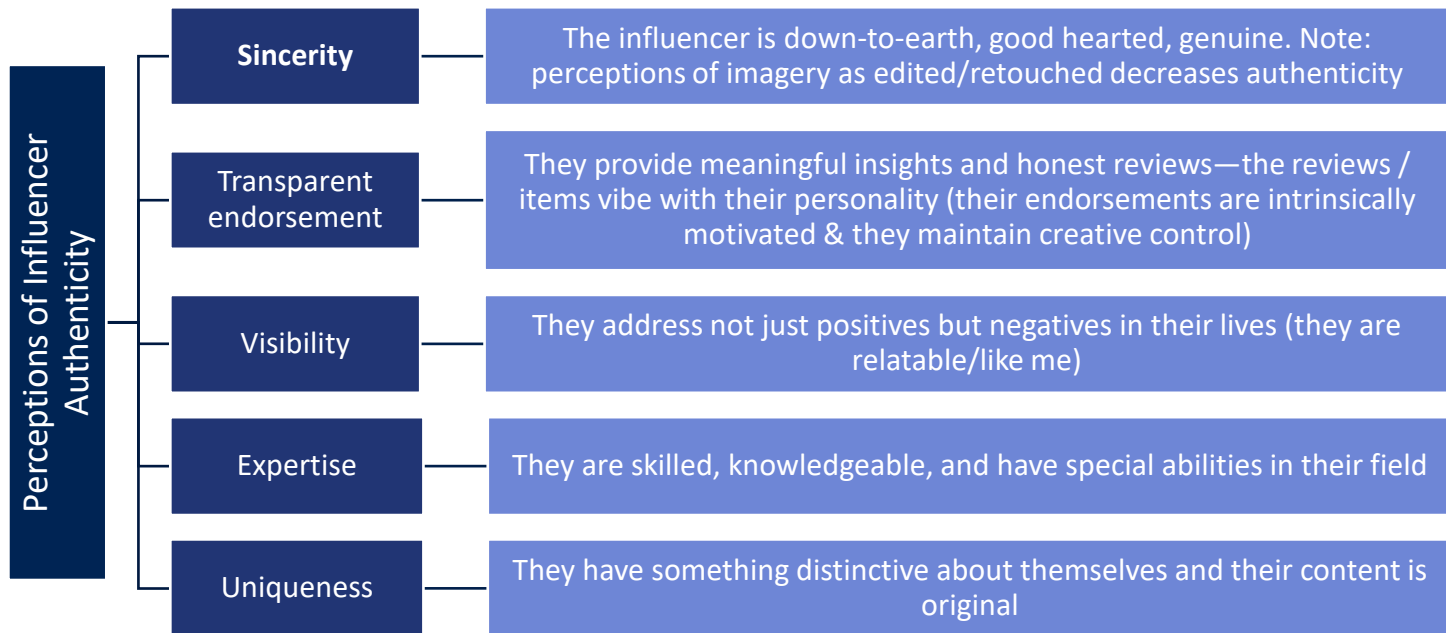


Green = over index vs Total; Red = under index vs Total

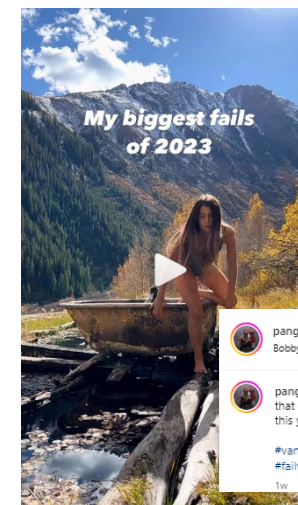


53% of lapsed individuals already seek relevant information via social sites—optimize awareness & influence via authenticity

Prior research provides a framework for understanding how to choose and craft authenticity via our influencers—with the first two factors being the most important drivers of attitudes and purchase intention.



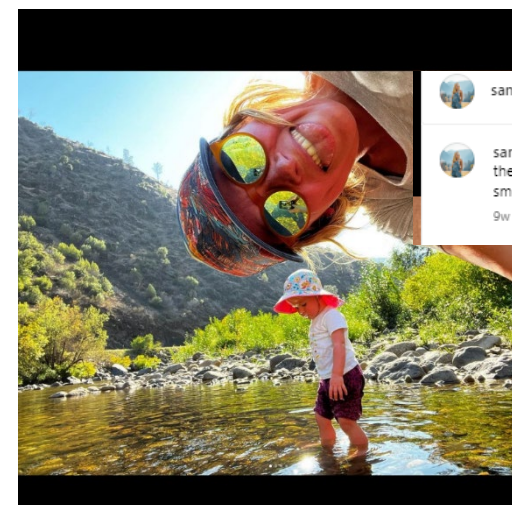
Consider outdoor activity influencers who might add angling to their content in a relatable & genuine fashion. Showcasing how they piggyback (add) angling to other activities like a park visit, camping, hiking, reading, etc. will be especially powerful.



pang_bang • Follow
Bobby Darin • Call Me Irresponsible

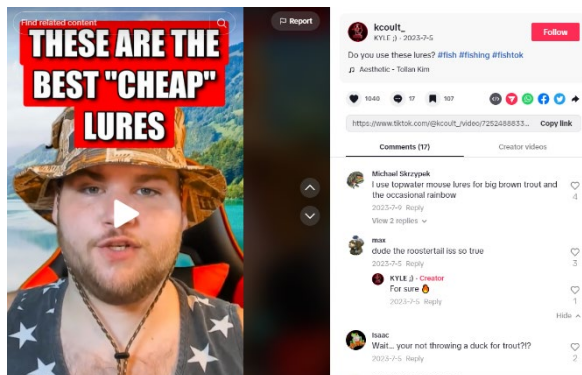
pang_bang Ya win some ya lose some 🤔 this is just a reminder that everyone you see online has had GOOD AND bad moments this year and it's okay that you did too 🙏

#vanlife #vanlifereality #campervan #camperviral #2023 #fail #failvideo #solotravel
1w



sannimccandless • Follow

sannimccandless Snippets from Yosemite including playing in the Merced, happy hikers, El Cap headlamps at night, and a smoky meadow in the morning.
9w



kcouit_ KYEJ 3 • 2023-7-5
Do you use these lures? #fish #fishing #tastok
Aesthetic - Itan Kim

1543 17 102

https://www.tiktok.com/@kcouit_video/7252488833... Copy link

Comments (17) Creator videos

Michael Skrypek I use topwater mouse lures for big brown trout and the occasional rainbow 2023-7-9 Reply View 2 replies

max dude the roostertail lol so true 2023-7-5 Reply

KYLE J. Gwenter For sure 2023-7-5 Reply

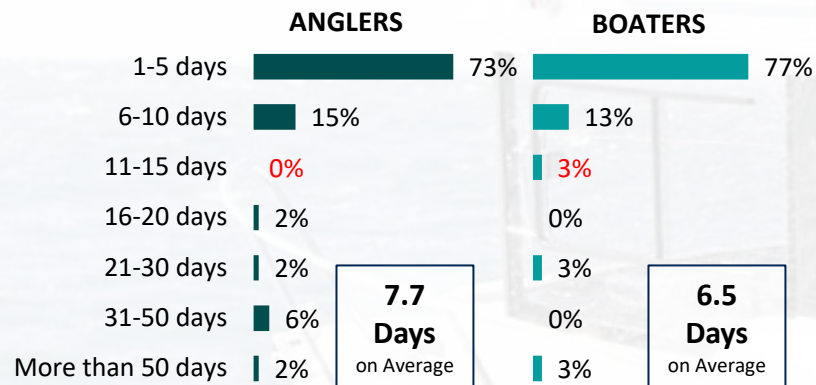
isaac Wait... your not throwing a duck for trout? 2023-7-5 Reply



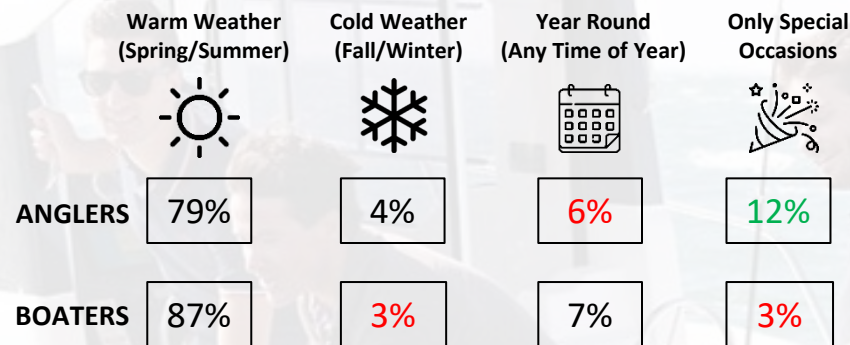
BeSci Insight Interconnectedness: One bonus to choosing more micro-influencers is their ability to perform more reciprocal intimacies to build feelings of connectedness (e.g., calling out a follower/tagging, responding to messages, liking a followers' post, etc.)

WHO THEY ARE: RELEVANT EXPERIENCE

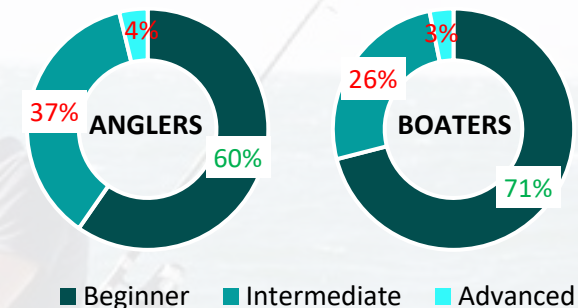
ANNUAL FREQUENCY



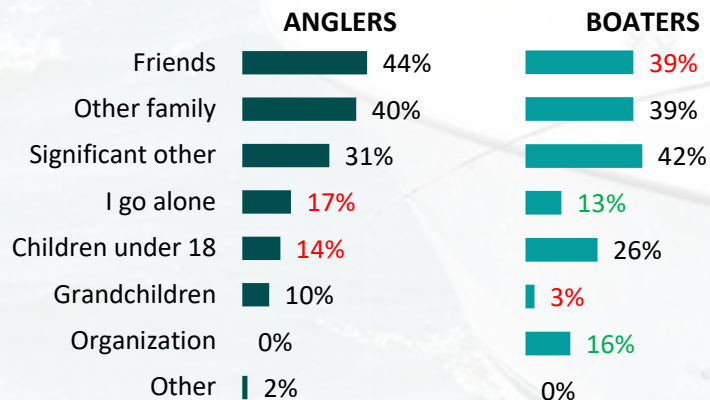
TIME OF YEAR



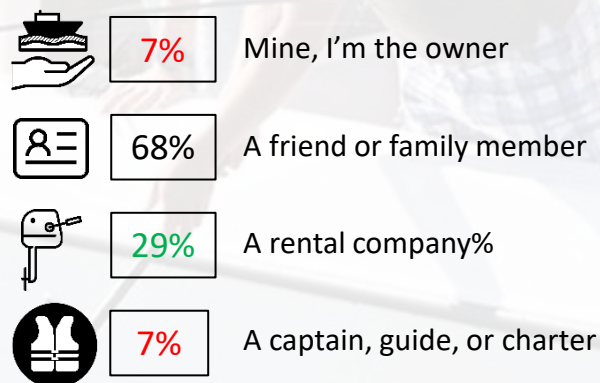
SKILL LEVEL



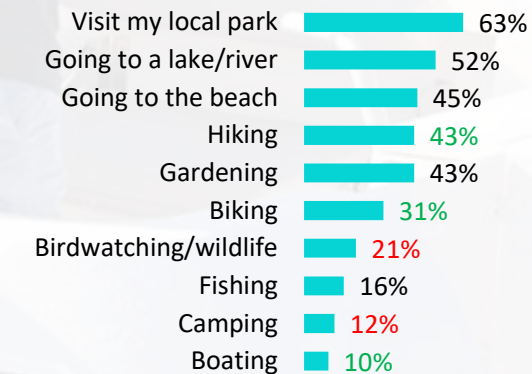
WITH WHOM



RENT/OWN/FRIEND (BOATING-SPECIFIC)



OTHER PAST YEAR OUTDOOR ACTIVITIES



AMPLIFYING THEIR TAILWINDS: HOBBIES & GOALS



SHARE OF FREE TIME

39%

of awake time consists of 'free time' *on average*

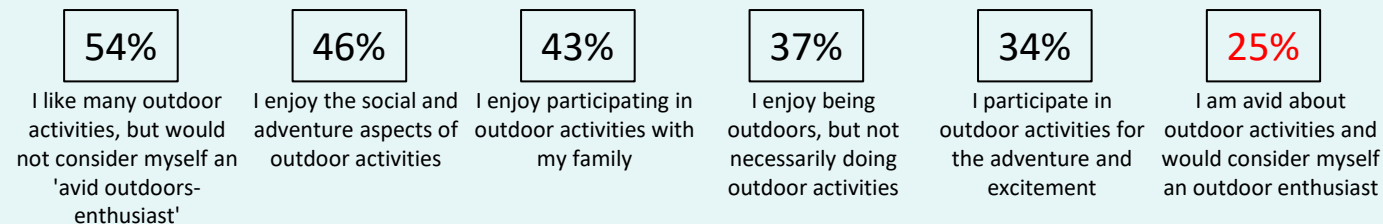


TOP ACTIVITIES ENGAGE WITH IN FREE TIME

		Solo	Shared	Both
Watching movies at home	70%	43%	35%	22%
Reading	54%	98%	2%	0%
Cooking	52%	65%	23%	12%
Going to restaurants/bars	41%	6%	77%	18%
Leisurely physical exercise	36%	63%	23%	13%
Gardening/Yard work	35%	*	*	*
Going to the movies	33%	*	*	*
Physical exercise	25%	*	*	*
Physical exercise outdoors	25%	*	*	*
Going for a drive	22%	*	*	*
Art & Craft Projects	22%	*	*	*
Park or Playground	22%	*	*	*

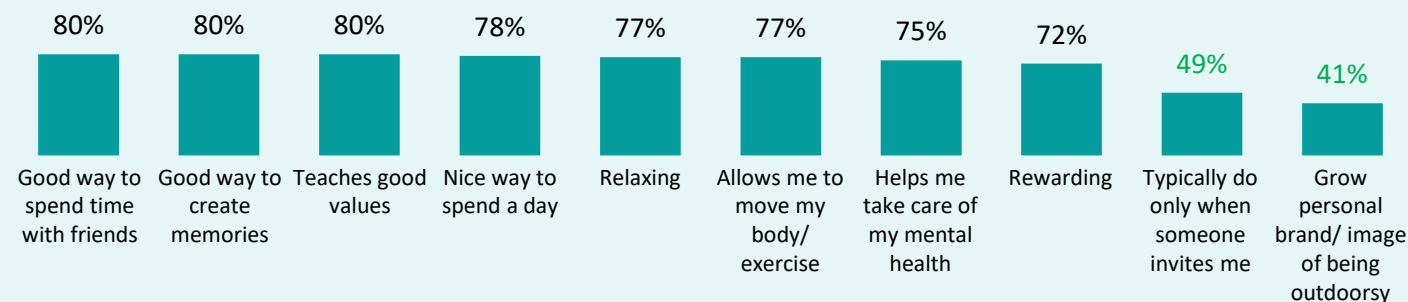
OUTDOOR INTEREST

-% Describes me Completely/Most of the Time-

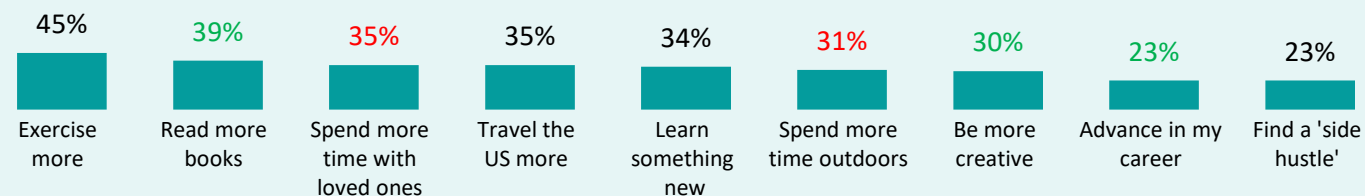


TOP OUTDOOR MOTIVATIONS

-% Agree Completely/Agree Somewhat-



TOP PERSONAL GOALS



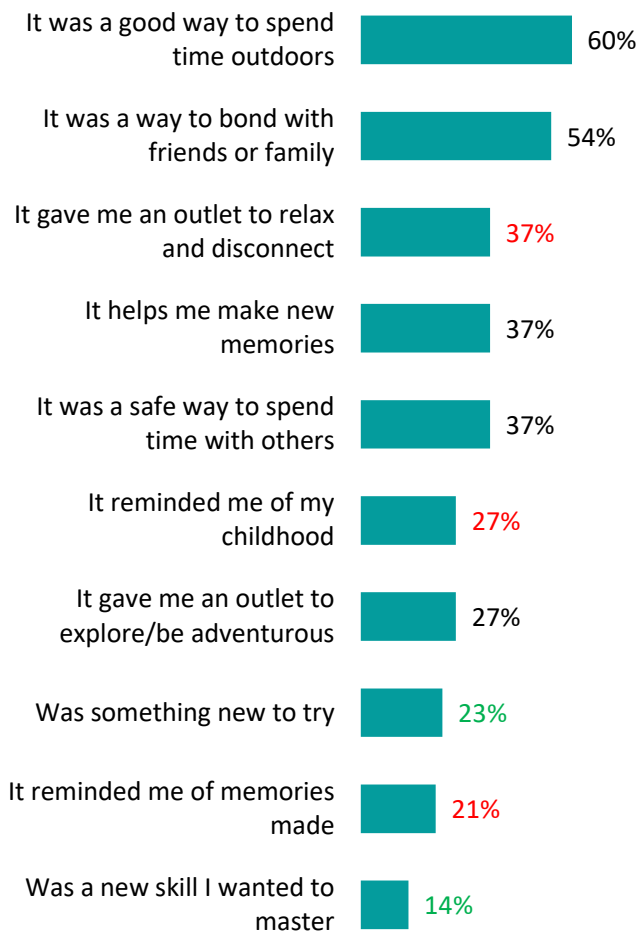
Base: An Enthusiastic Buddy (n=83) *Base too low to report (n<30)

Multiple Questions: Q19, Q20, Q21, Q22, Q 23, Q24

Green / Red Font Based on Significantly High / Low Index Compared to Total Average (Green > 120, Red < 80); Indexing reported if Total Average = 5%+

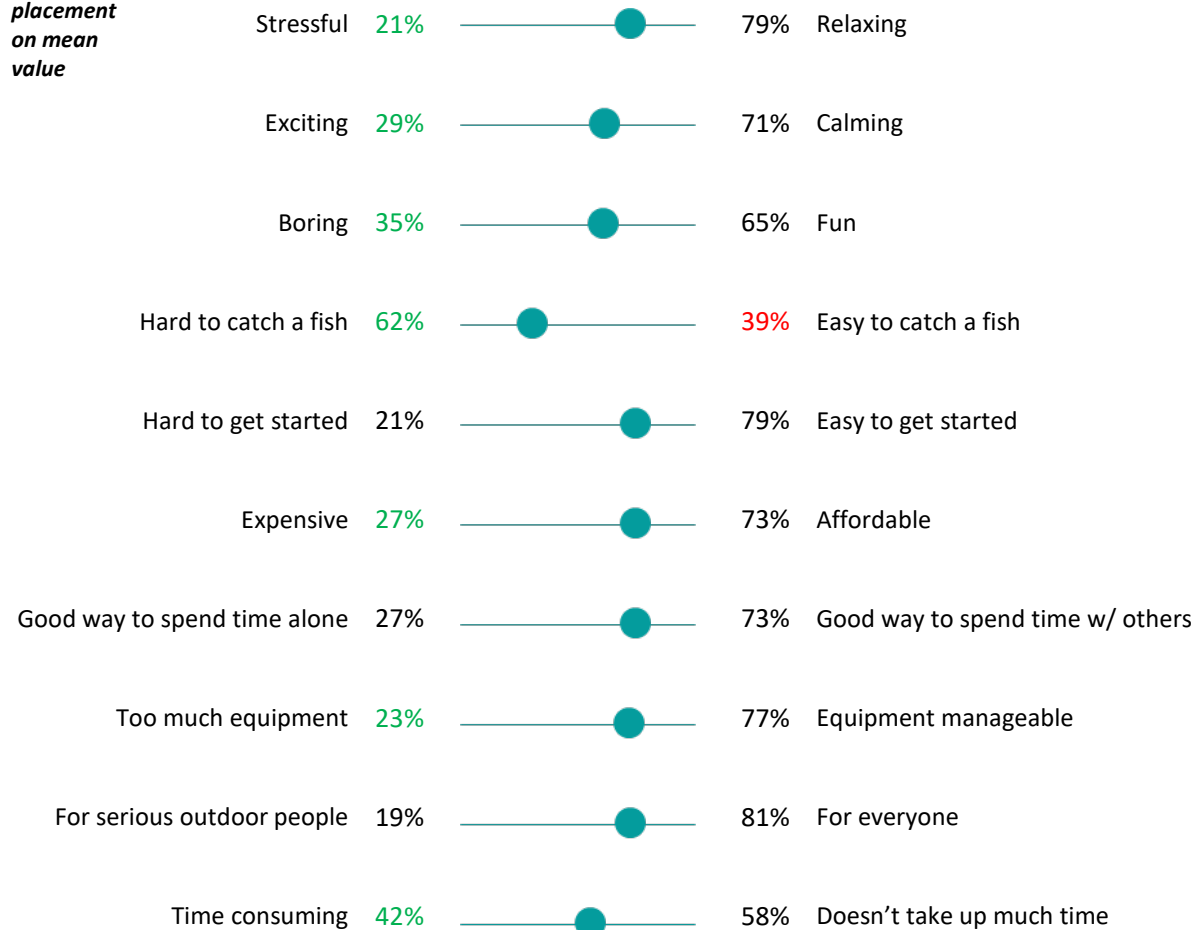
AMPLIFYING THEIR TAILWINDS: WHAT WOULD BRING THEM BACK TO FISHING

REASONS PARTICIPATED IN ACTIVITY

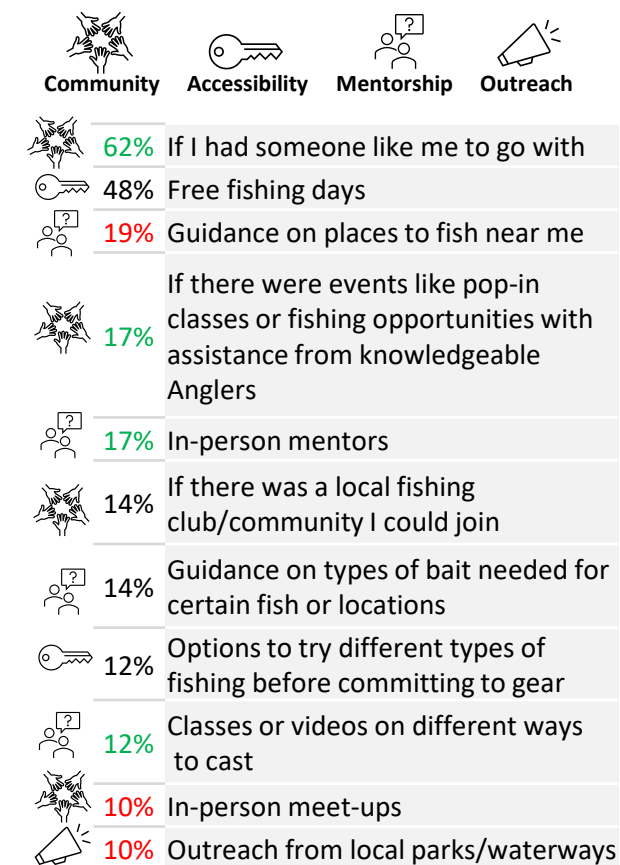


Dot placement on mean value

FIRST IMPRESSION MOMENTS



TAILWINDS



Base: An Enthusiastic Buddy/Anglers (n=52)

Multiple Questions: Q10, Q11a, Q16a

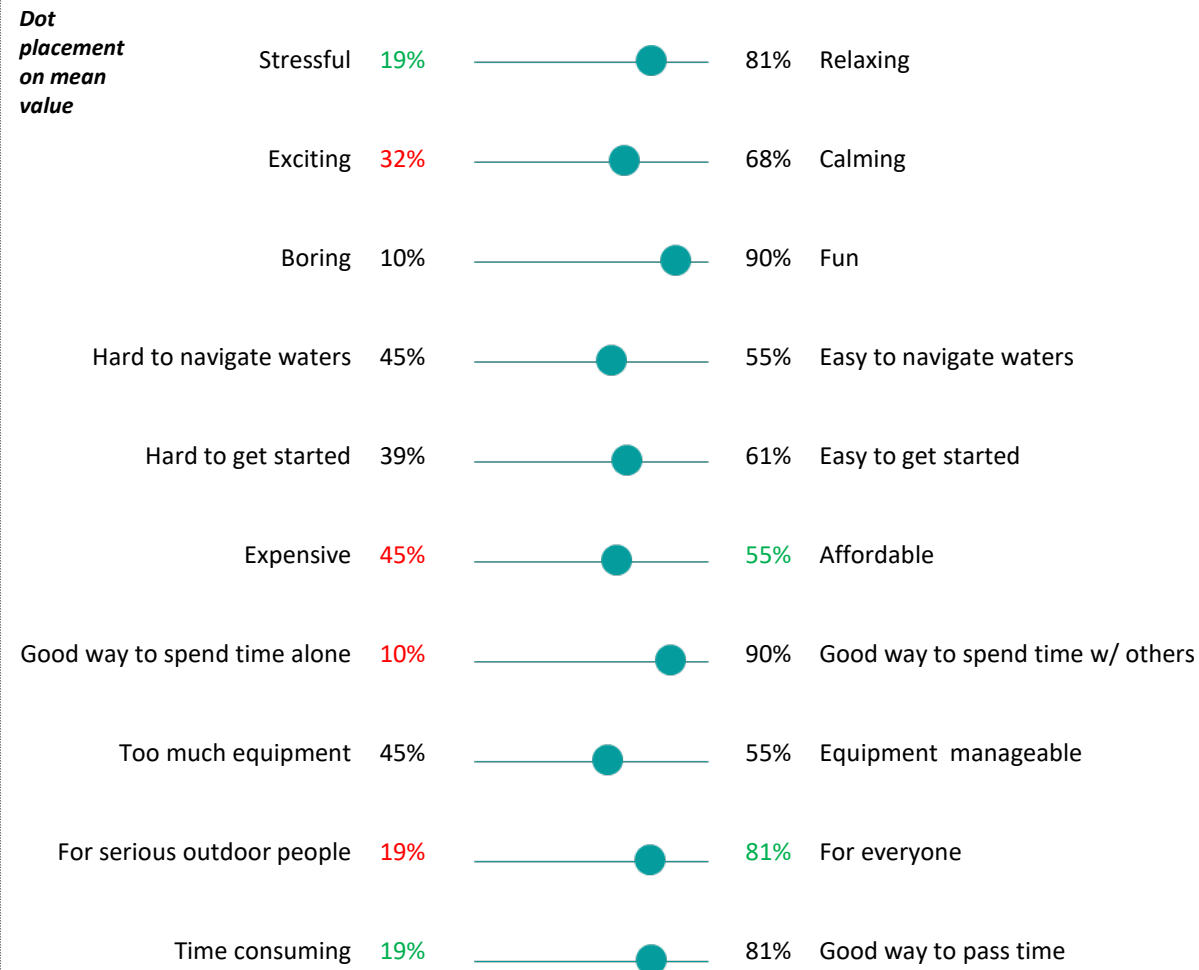
Green / Red Font Based on Significantly High / Low Index Compared to Total (Green > 120, Red < 80); Indexing reported if Total = 5%+

AMPLIFYING THEIR TAILWINDS: WHAT WOULD BRING THEM BACK TO BOATING

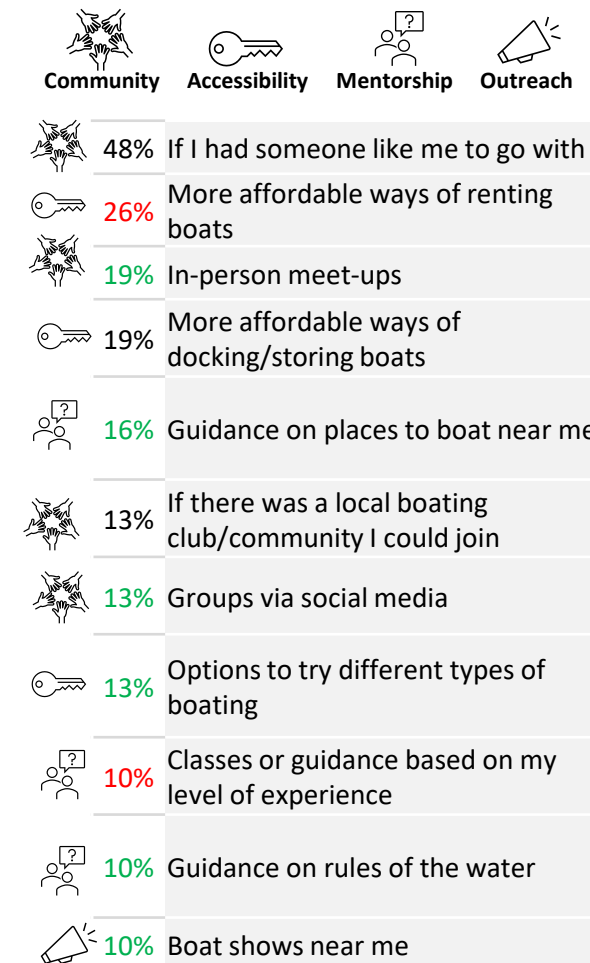
REASONS PARTICIPATED IN ACTIVITY



FIRST IMPRESSION MOMENTS



TAILWINDS



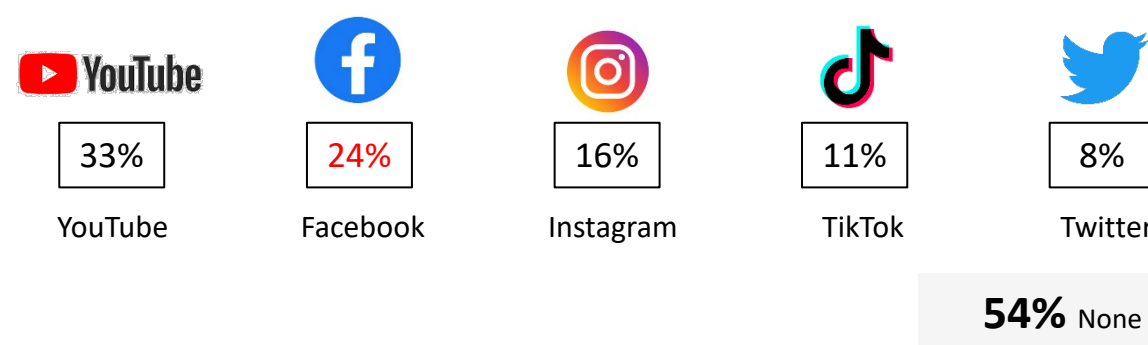
Base: An Enthusiastic Buddy/Boaters (n=31). Base size directional. Multiple Questions: Q10, Q11b, Q16b. Green / Red Font Based on Significantly High / Low Index Compared to Total (Green > 120, Red < 80); Indexing reported if Total = 5%+

AMPLIFYING THEIR TAILWINDS: COMMUNICATIONS & LOGISTICS

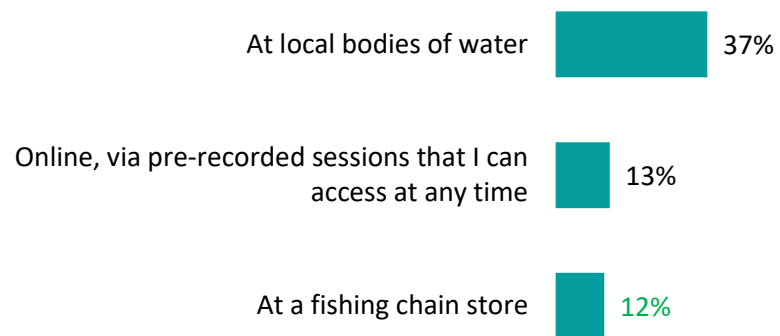
TOP MARKETING CHANNELS



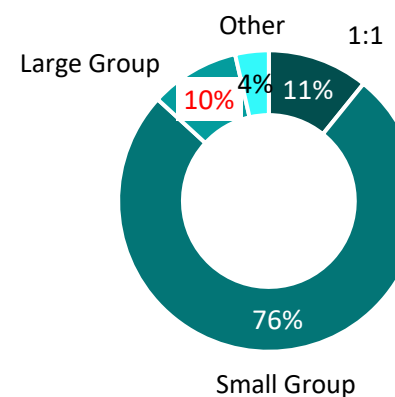
TOP SOCIAL MEDIA



CLASS FORMAT



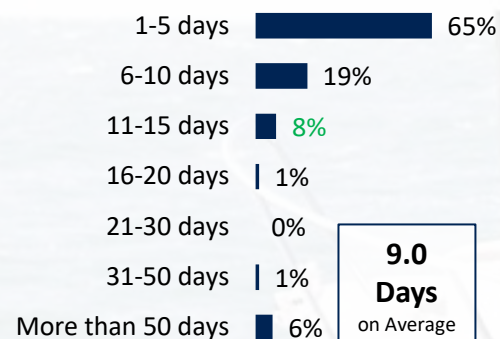
CLASS SIZE



WHO THEY ARE: RELEVANT EXPERIENCE

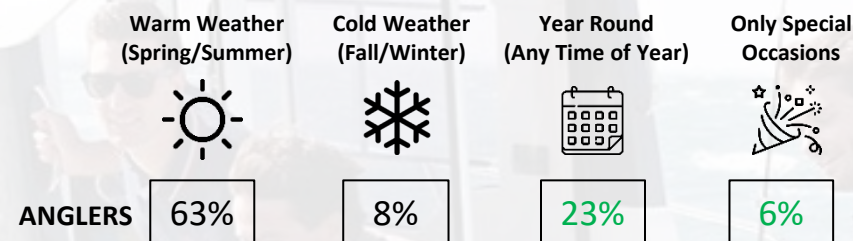
ANNUAL FREQUENCY

ANGLERS



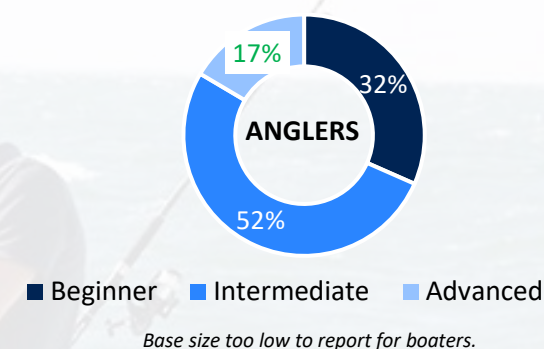
Base size too low to report for boaters.

TIME OF YEAR



Base size too low to report for boaters.

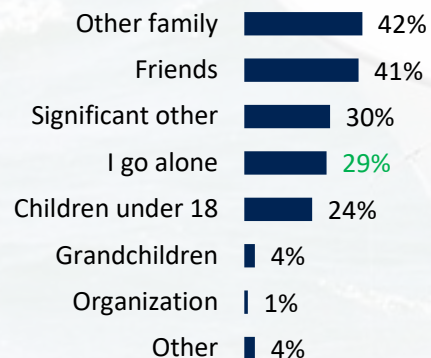
SKILL LEVEL



Base size too low to report for boaters.

WITH WHOM

ANGLERS



Base size too low to report for boaters.

RENT/OWN/FRIEND (BOATING-SPECIFIC)

Base size too low to report for boaters.

OTHER PAST YEAR OUTDOOR ACTIVITIES



AMPLIFYING THEIR TAILWINDS: HOBBIES & GOALS



SHARE OF FREE TIME

41%

of awake time consists of 'free time' on average

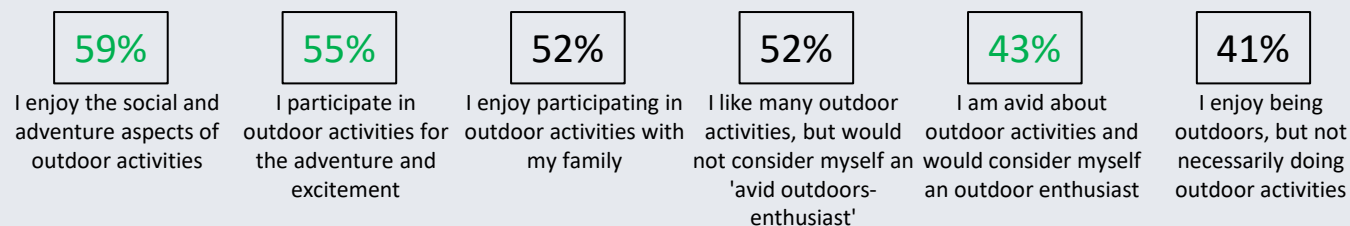


TOP ACTIVITIES ENGAGE WITH IN FREE TIME

		Solo	Shared	Both
Watching movies at home	55%	49%	25%	26%
Reading	52%	94%	4%	2%
Cooking	46%	68%	17%	15%
Gardening/Yard work	45%	57%	28%	15%
Going for a drive	39%	38%	50%	13%
Leisurely physical exercise	38%	49%	36%	15%
Physical exercise	38%	70%	18%	13%
Going to restaurants/bars	37%	21%	68%	11%
Physical exercise outdoors	32%	70%	21%	9%
Going to the movies	30%	19%	58%	23%
Game nights	28%	*	*	*
Camping	24%	*	*	*
Knitting/Crocheting	9%	*	*	*
Hunting	9%	*	*	*

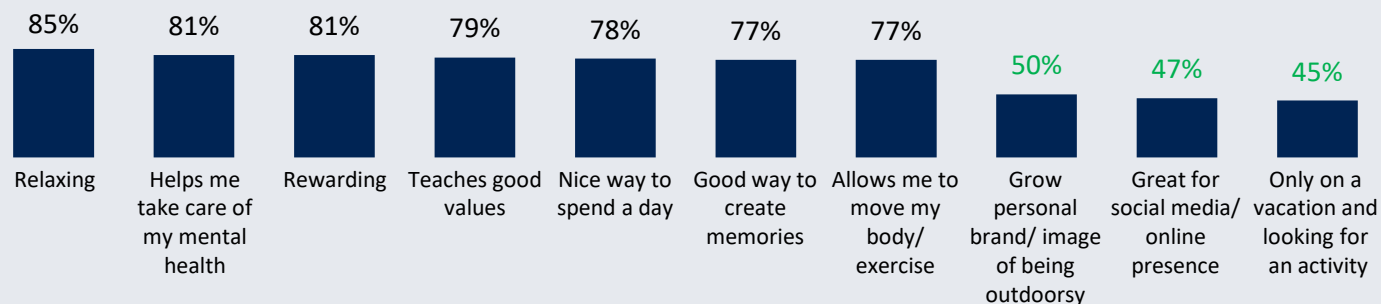
OUTDOOR INTEREST

-% Describes me Completely/Most of the Time-

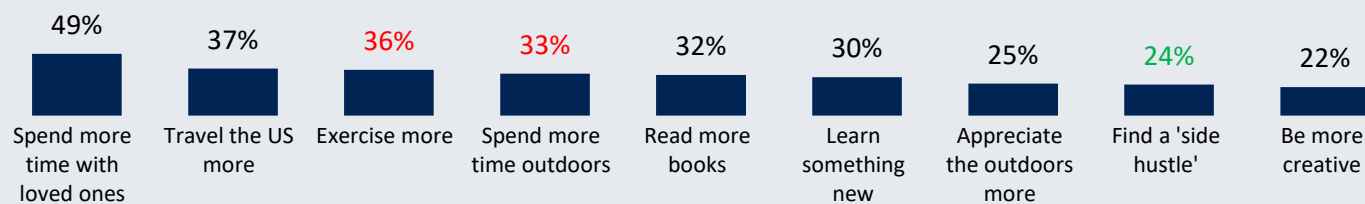


TOP OUTDOOR MOTIVATIONS

-% Agree Completely/Agree Somewhat-



TOP PERSONAL GOALS



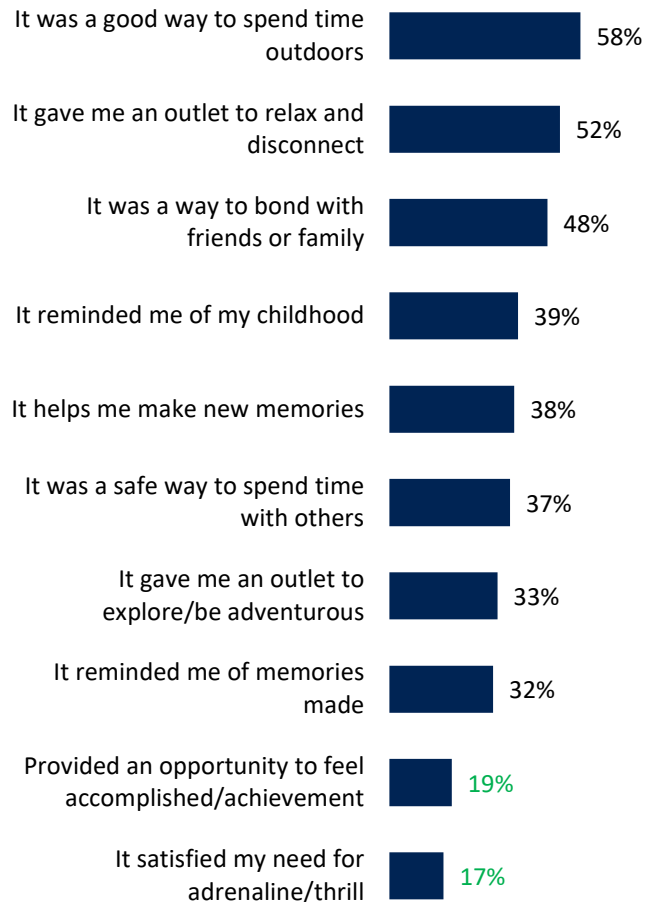
Base: More Interest (n=103) *Base too low to report (n<30)

Multiple Questions: Q19, Q20, Q21, Q22, Q 23, Q24

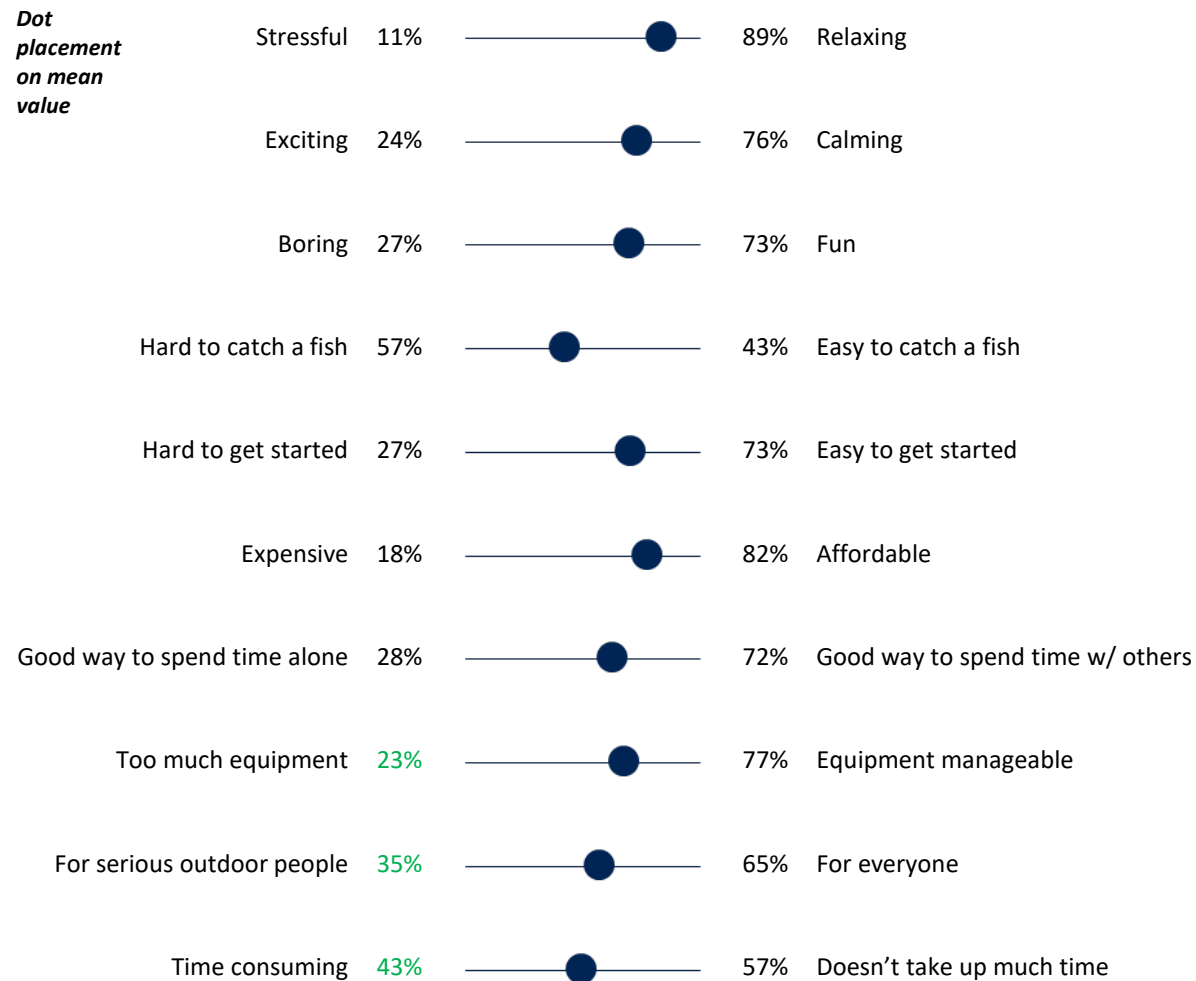
Green / Red Font Based on Significantly High / Low Index Compared to Total Average (Green > 120, Red < 80); Indexing reported if Total Average = 5%+

AMPLIFYING THEIR TAILWINDS: WHAT WOULD BRING THEM BACK TO FISHING

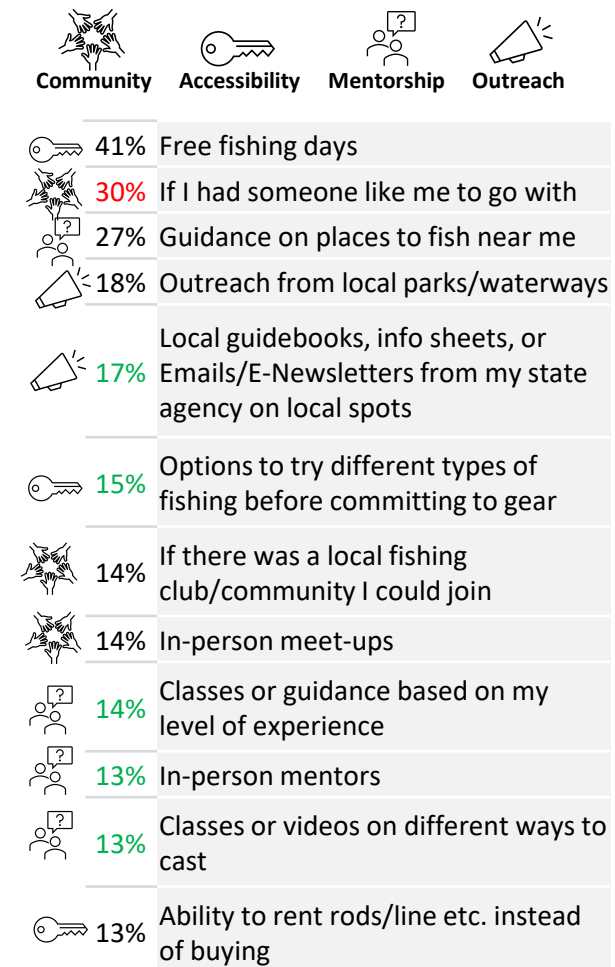
REASONS PARTICIPATED IN ACTIVITY



FIRST IMPRESSION MOMENTS



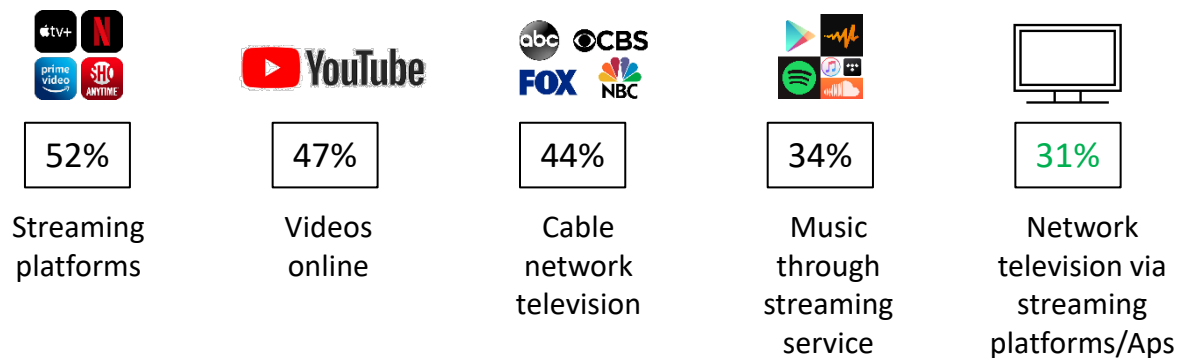
TAILWINDS



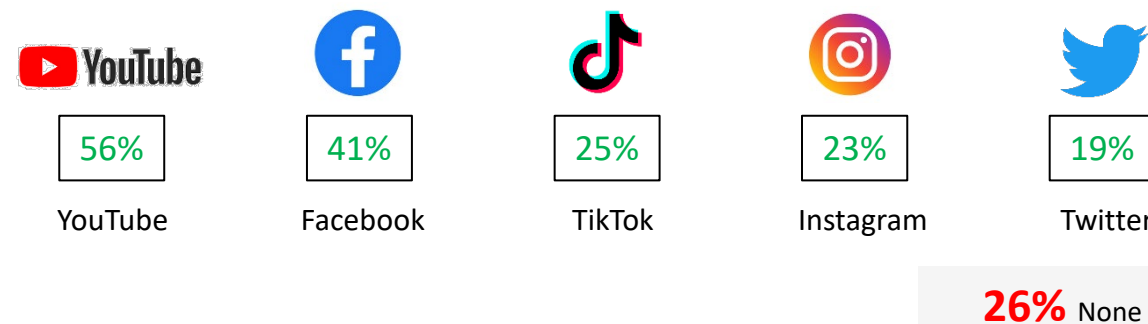
Base: More Interest Anglers (n=79). Note: not showing this slide for Boating due to low base size.
 Multiple Questions: Q10, Q11a, Q16a
 Green / Red Font Based on Significantly High / Low Index Compared to Total (Green > 120, Red < 80); Indexing reported if Total = 5%+

AMPLIFYING THEIR TAILWINDS: COMMUNICATIONS & LOGISTICS

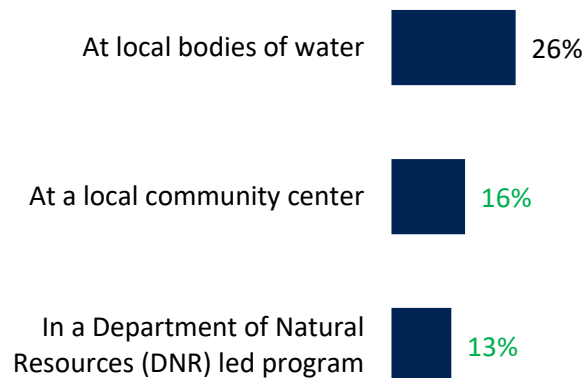
TOP MARKETING CHANNELS



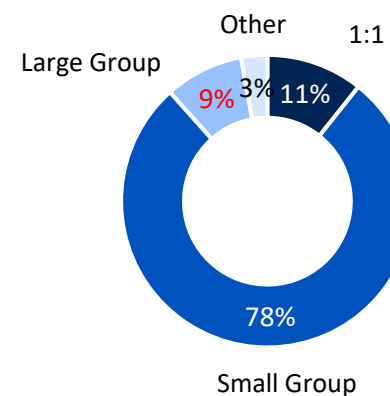
TOP SOCIAL MEDIA



CLASS FORMAT

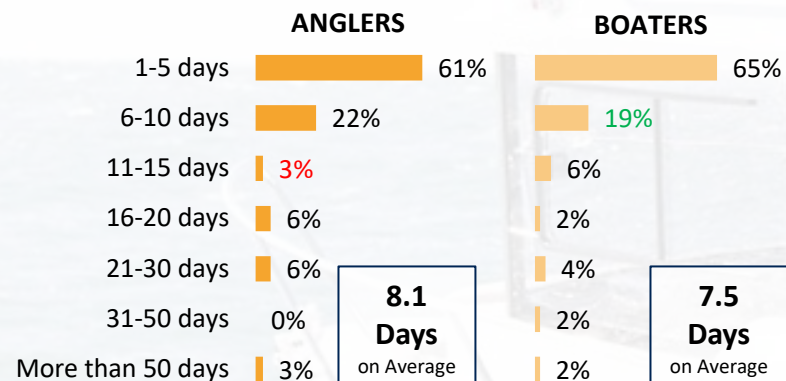


CLASS SIZE

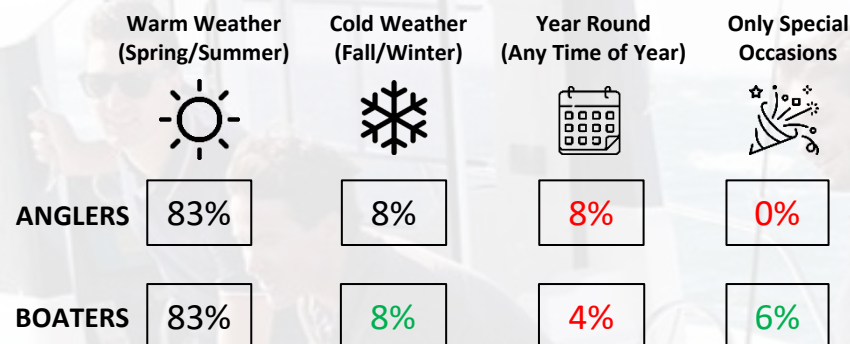


WHO THEY ARE: RELEVANT EXPERIENCE

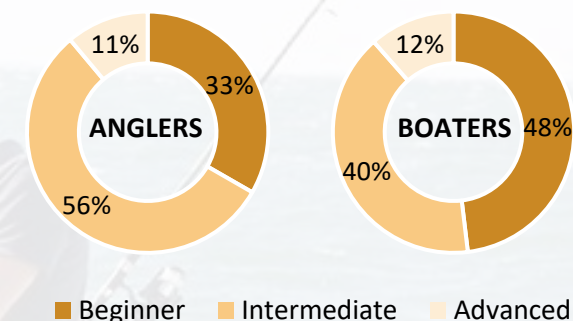
ANNUAL FREQUENCY



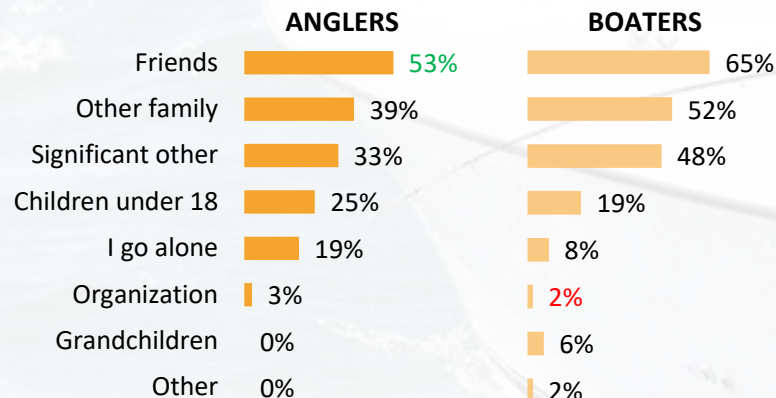
TIME OF YEAR



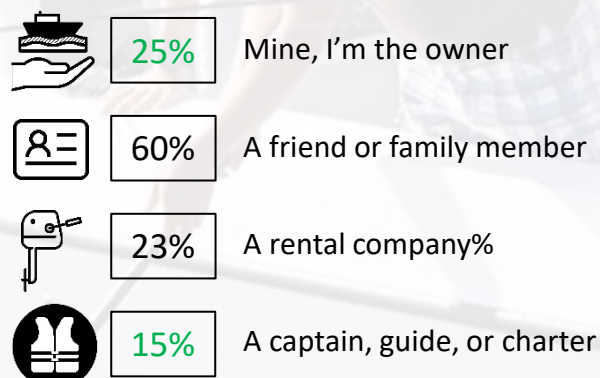
SKILL LEVEL



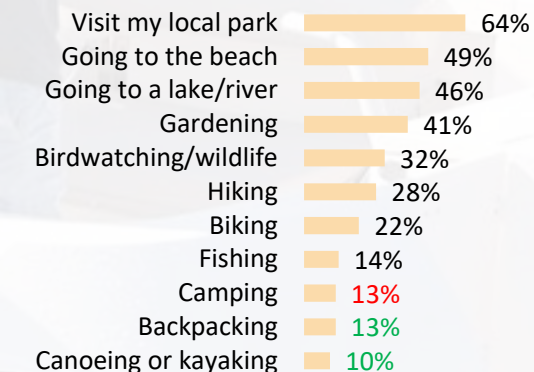
WITH WHOM



RENT/OWN/FRIEND (BOATING-SPECIFIC)



OTHER PAST YEAR OUTDOOR ACTIVITIES



AMPLIFYING THEIR TAILWINDS: HOBBIES & GOALS



SHARE OF FREE TIME

37%

of awake time consists of 'free time' on average



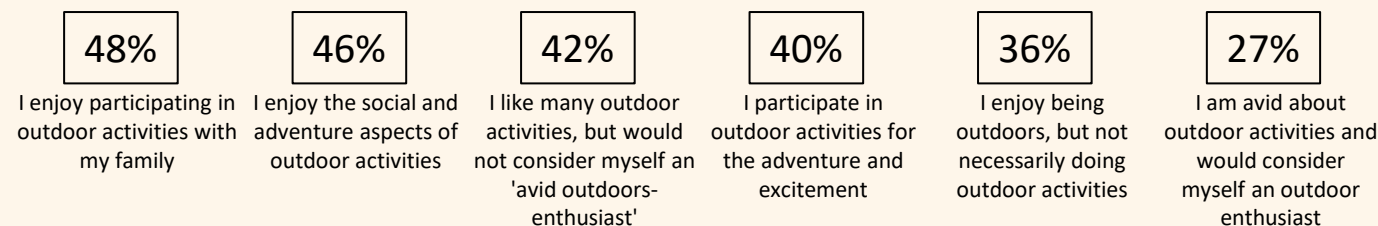
TOP ACTIVITIES ENGAGE WITH IN FREE TIME

Solo Shared Both

Activity	Total %	Solo	Shared	Both
Watching movies at home	63%	51%	29%	20%
Cooking	59%	71%	19%	10%
Reading	57%	90%	6%	4%
Leisurely physical exercise	50%	64%	11%	25%
Going for a drive	46%	40%	45%	15%
Local Pool/Beach	31%	*	*	*
Art & Craft Projects	30%	*	*	*
Park or Playground	28%	*	*	*
Museums	25%	*	*	*
Attending sporting events	22%	*	*	*
Amusement Parks	21%	*	*	*
Hunting	8%	*	*	*

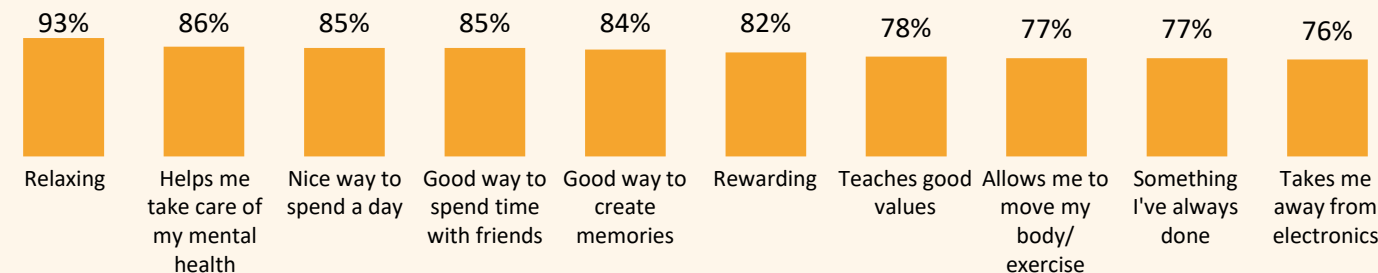
OUTDOOR INTEREST

-% Describes me Completely/Most of the Time-

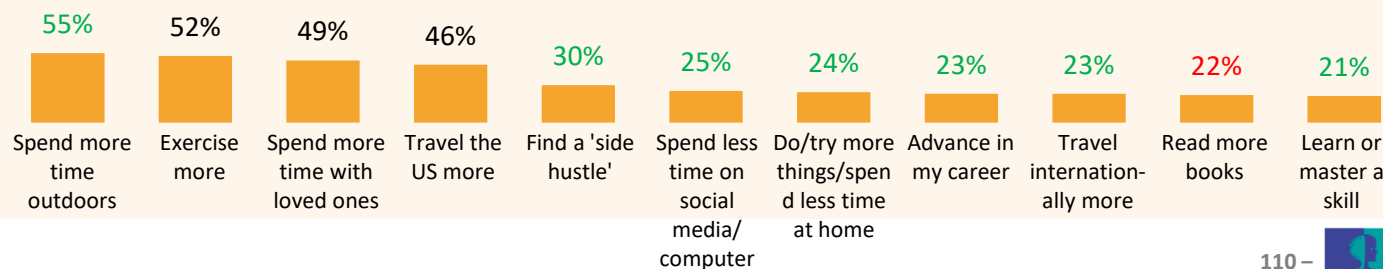


TOP OUTDOOR MOTIVATIONS

-% Agree Completely/Agree Somewhat-



TOP PERSONAL GOALS



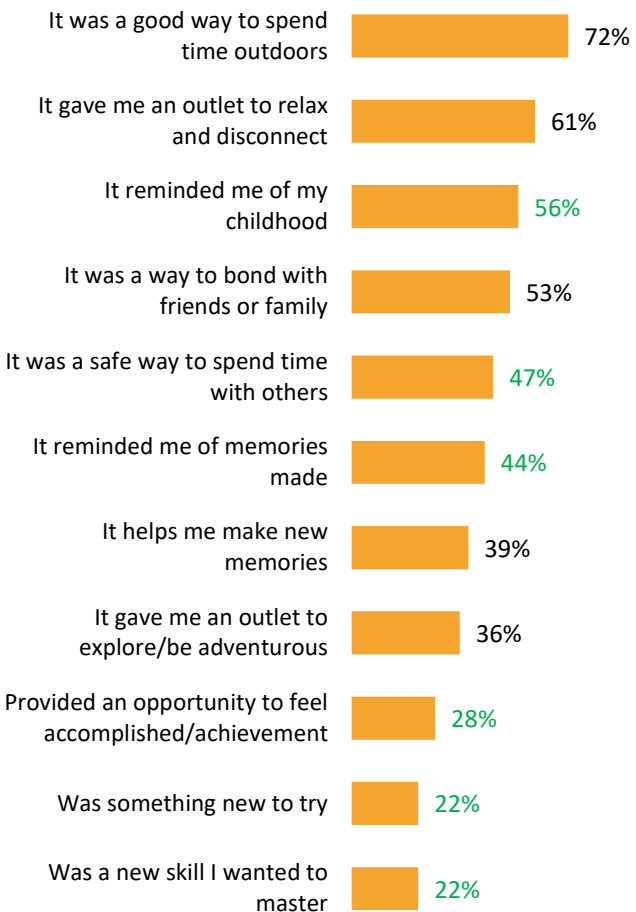
Base: Affordable Access (n=88) *Base too low to report (n<30)

Multiple Questions: Q19, Q20, Q21, Q22, Q 23, Q24

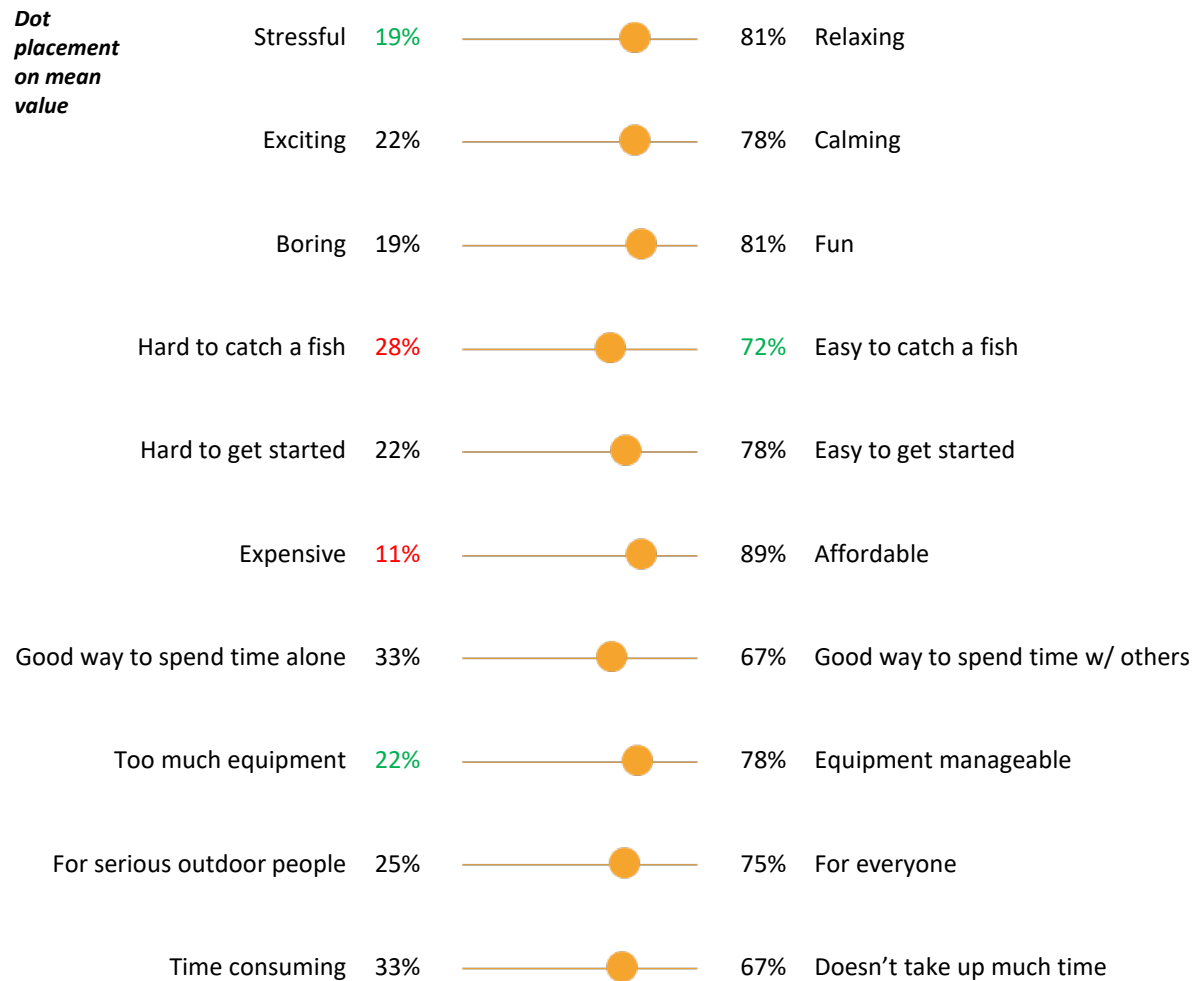
Green / Red Font Based on Significantly High / Low Index Compared to Total Average (Green > 120, Red < 80); Indexing reported if Total Average = 5%+

AMPLIFYING THEIR TAILWINDS: WHAT WOULD BRING THEM BACK TO FISHING

REASONS PARTICIPATED IN ACTIVITY



FIRST IMPRESSION MOMENTS



TAILWINDS



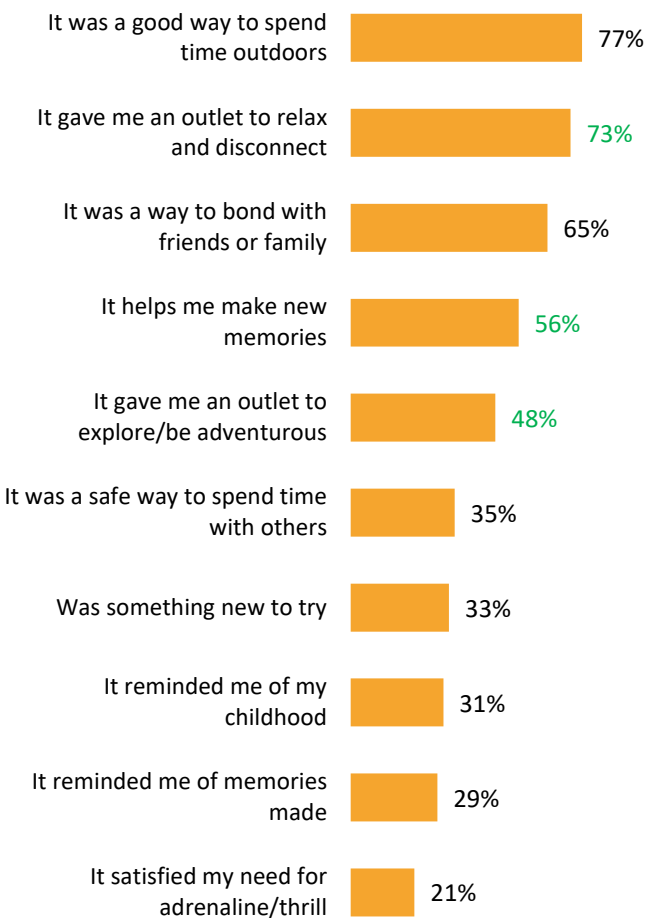
Base: Affordable Access Anglers (n=36)

Multiple Questions: Q10, Q11a, Q16a

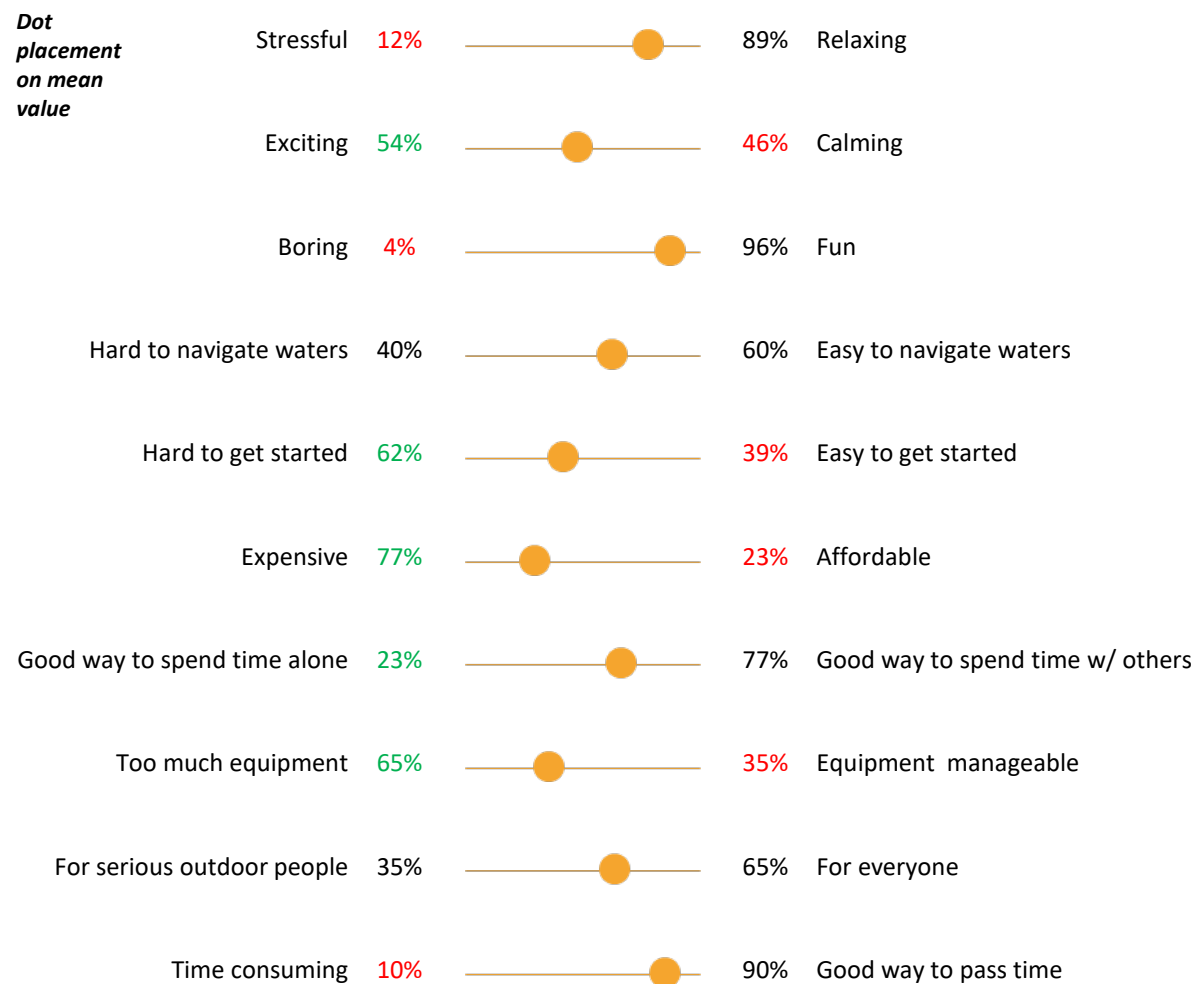
Green / Red Font Based on Significantly High / Low Index Compared to Total (Green > 120, Red < 80); Indexing reported if Total = 5%+

AMPLIFYING THEIR TAILWINDS: WHAT WOULD BRING THEM BACK TO BOATING

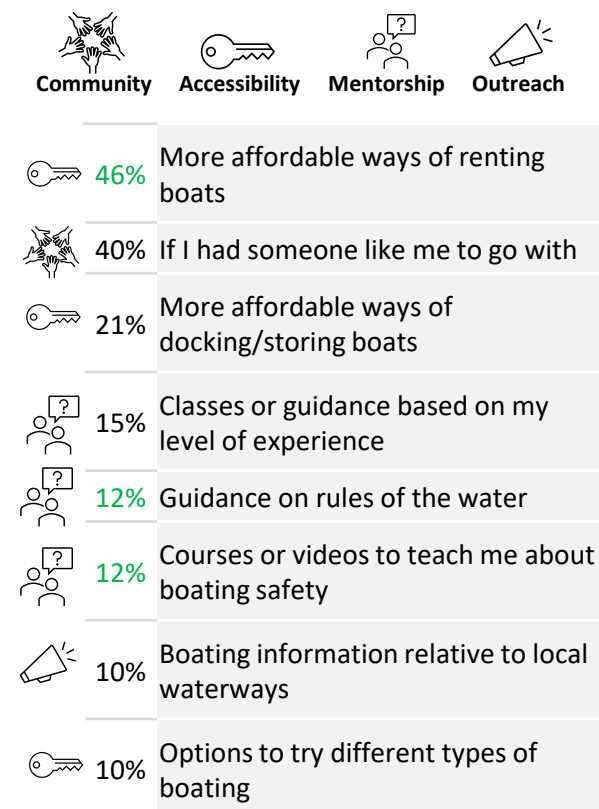
REASONS PARTICIPATED IN ACTIVITY



FIRST IMPRESSION MOMENTS



TAILWINDS



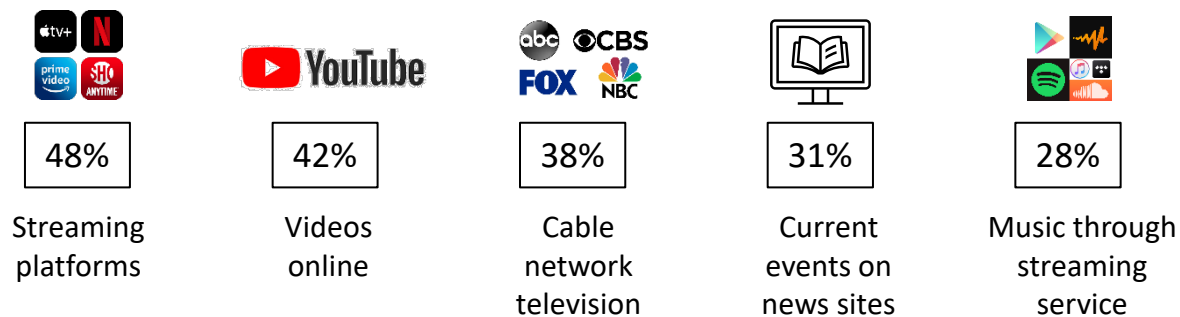
Base: Affordable Access Boaters (n=52)

Multiple Questions: Q10, Q11b, Q16b

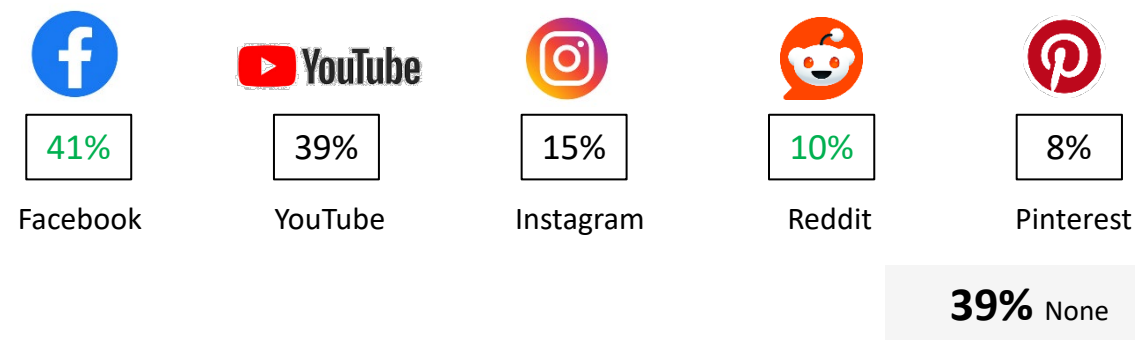
Green / Red Font Based on Significantly High / Low Index Compared to Total (Green > 120, Red < 80); Indexing reported if Total = 5%+

AMPLIFYING THEIR TAILWINDS: COMMUNICATIONS & LOGISTICS

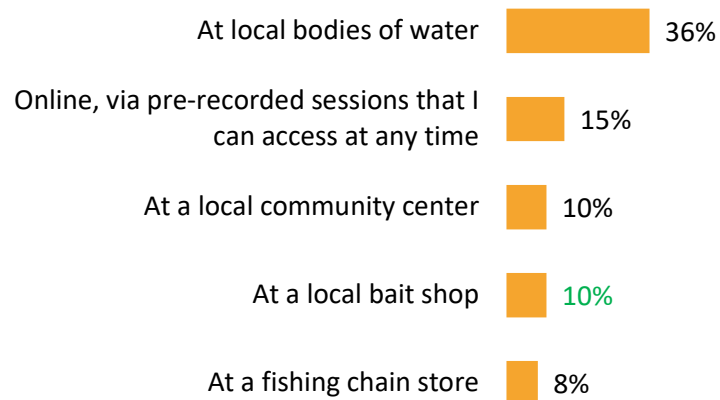
TOP MARKETING CHANNELS



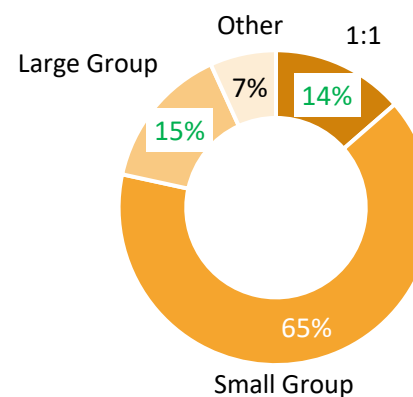
TOP SOCIAL MEDIA



CLASS FORMAT



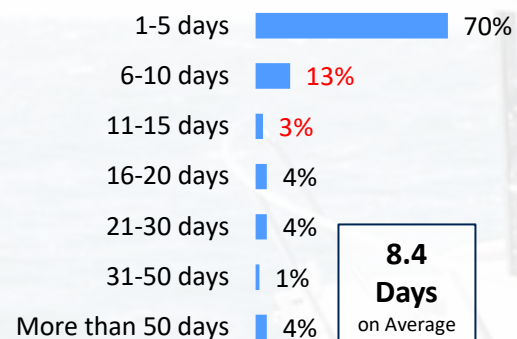
CLASS SIZE



WHO THEY ARE: RELEVANT EXPERIENCE

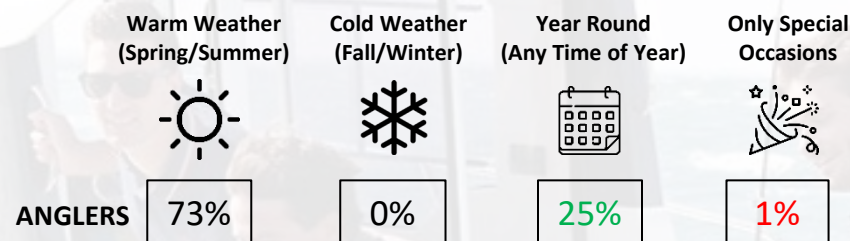
ANNUAL FREQUENCY

ANGLERS



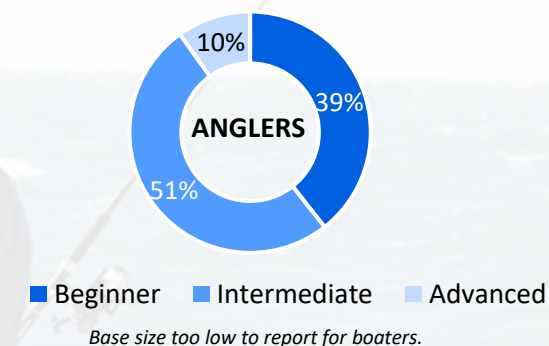
Base size too low to report for boaters.

TIME OF YEAR



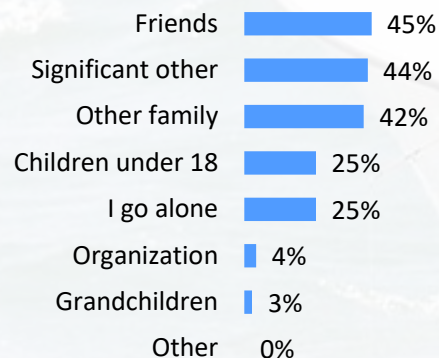
Base size too low to report for boaters.

SKILL LEVEL



WITH WHOM

ANGLERS

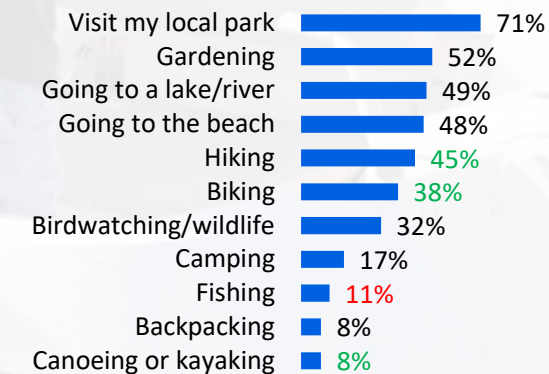


Base size too low to report for boaters.

RENT/OWN/FRIEND (BOATING-SPECIFIC)

Base size too low to report for boaters.

OTHER PAST YEAR OUTDOOR ACTIVITIES



AMPLIFYING THEIR TAILWINDS: HOBBIES & GOALS



SHARE OF FREE TIME

32%

of awake time consists of 'free time' on average

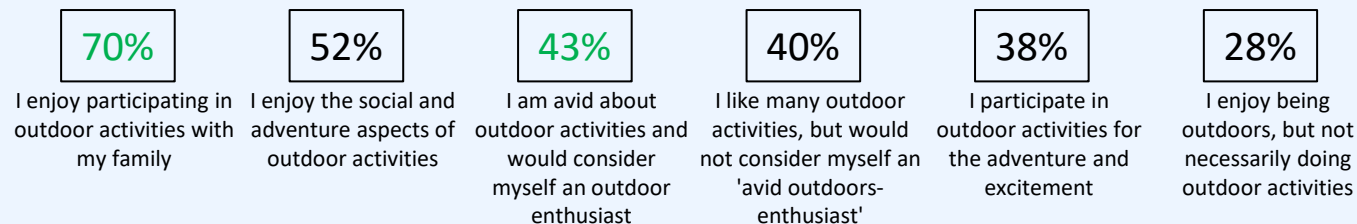


TOP ACTIVITIES ENGAGE WITH IN FREE TIME

		Solo	Shared	Both
Watching movies at home	78%	32%	36%	32%
Leisurely physical exercise	60%	43%	34%	23%
Reading	56%	96%	0%	4%
Cooking	55%	55%	20%	25%
Going to restaurants/bars	52%	4%	87%	9%
Gardening/Yard work	52%	61%	17%	22%
Physical exercise	49%	84%	7%	9%
Physical exercise outdoors	46%	68%	20%	12%
Going to the movies	38%	3%	68%	29%
Doing puzzles	36%	66%	28%	6%
Hiking	34%	20%	60%	20%
Home Renovation/DIY	27%	*	*	*
Attending sporting events	26%	*	*	*
Amusement Parks	18%	*	*	*
Playing sports	16%	*	*	*

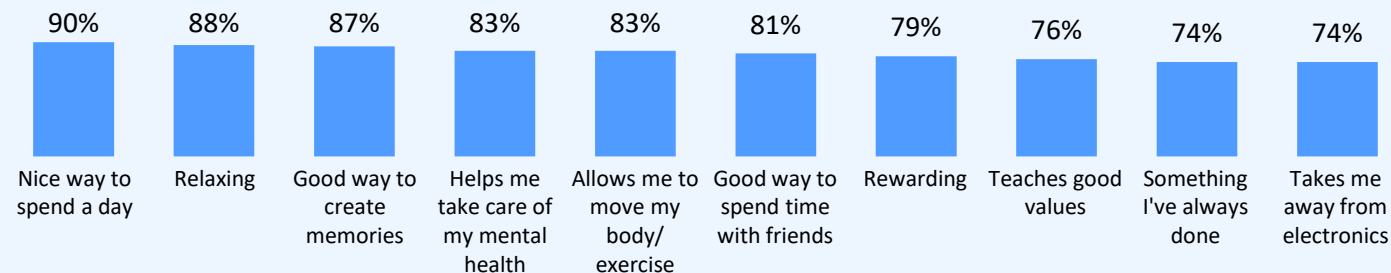
OUTDOOR INTEREST

-% Describes me Completely/Most of the Time-

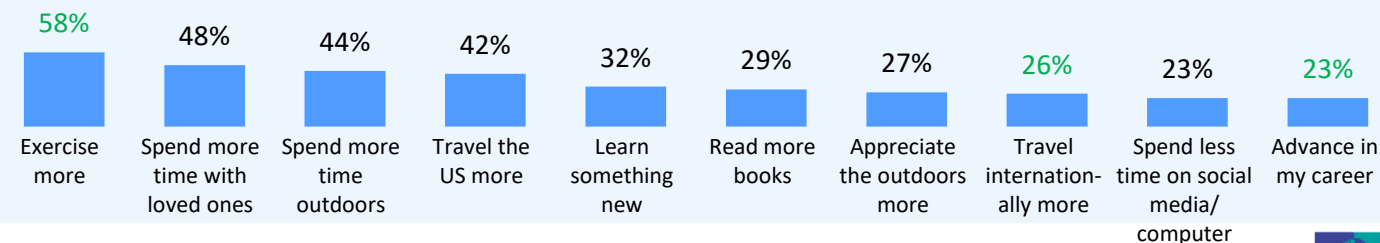


TOP OUTDOOR MOTIVATIONS

-% Agree Completely/Agree Somewhat-



TOP PERSONAL GOALS



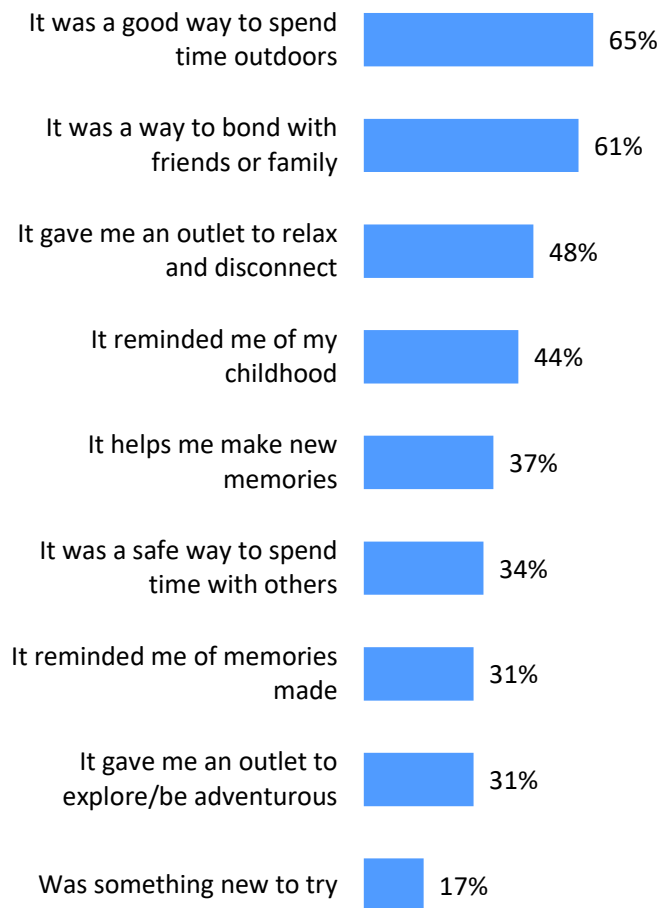
Base: More Adrenaline (n=89) *Base too low to report (n<30)

Multiple Questions: Q19, Q20, Q21, Q22, Q 23, Q24

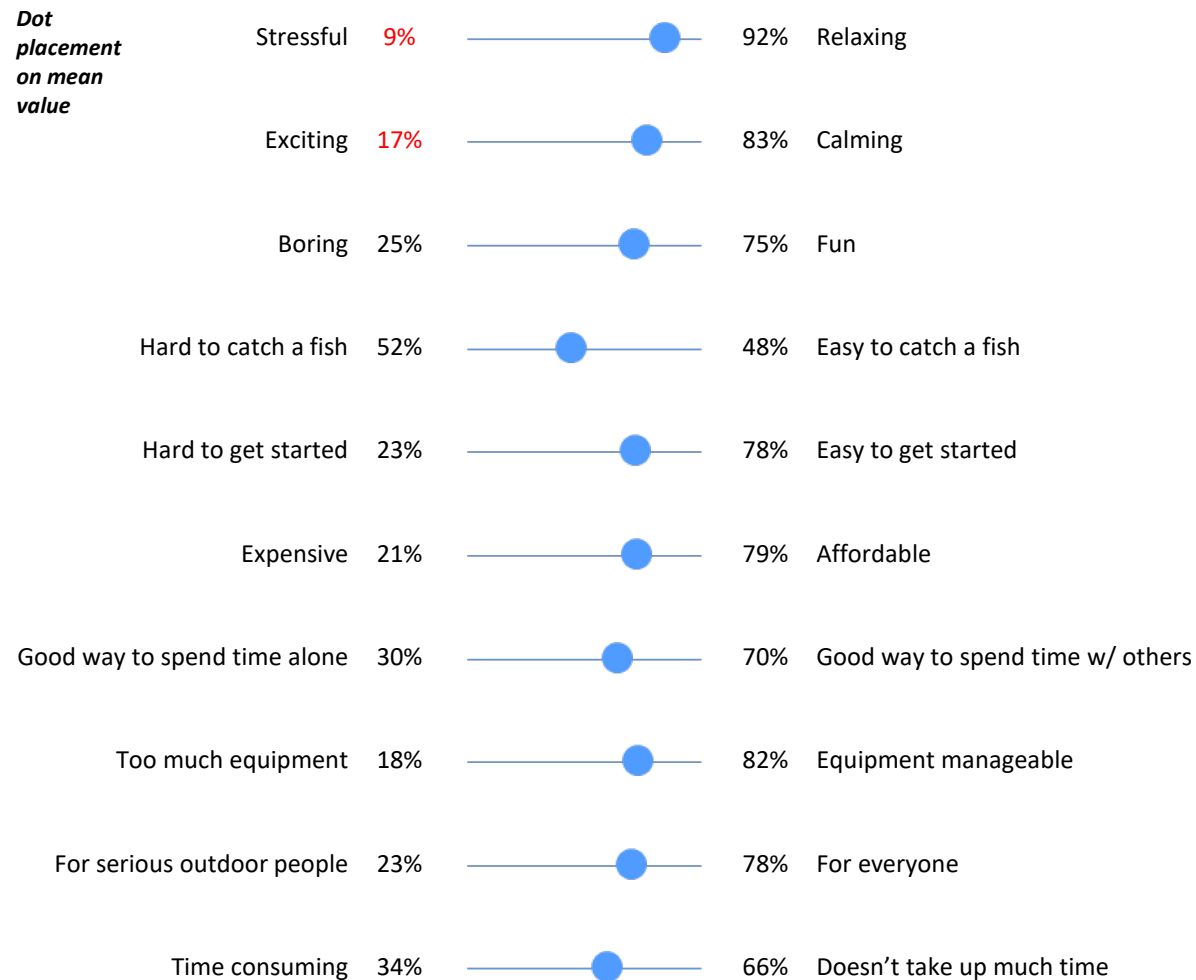
Green / Red Font Based on Significantly High / Low Index Compared to Total Average (Green > 120, Red < 80); Indexing reported if Total Average = 5%+

AMPLIFYING THEIR TAILWINDS: WHAT WOULD BRING THEM BACK TO FISHING

REASONS PARTICIPATED IN ACTIVITY



FIRST IMPRESSION MOMENTS



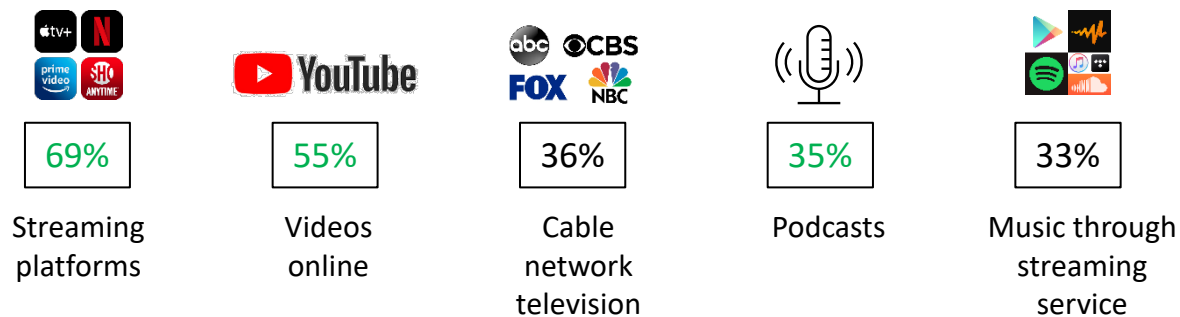
TAILWINDS



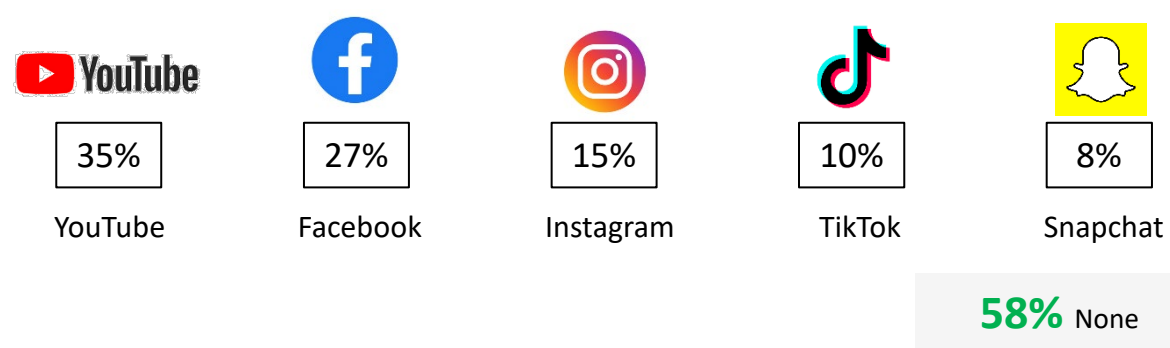
Base: More Adrenaline Anglers (n=71). Note: not showing this slide for Boating due to low base size.
 Multiple Questions: Q10, Q11a, Q16a
 Green / Red Font Based on Significantly High / Low Index Compared to Total (Green > 120, Red < 80); Indexing reported if Total = 5%+

AMPLIFYING THEIR TAILWINDS: COMMUNICATIONS & LOGISTICS

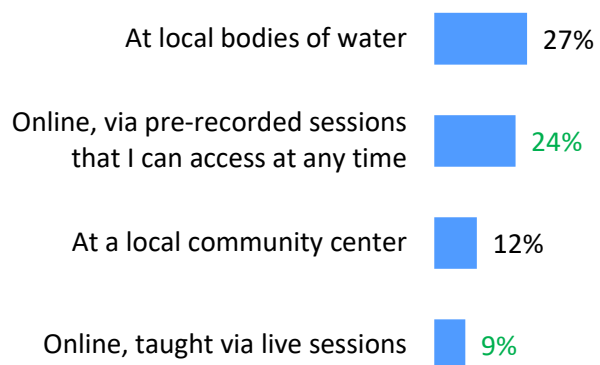
TOP MARKETING CHANNELS



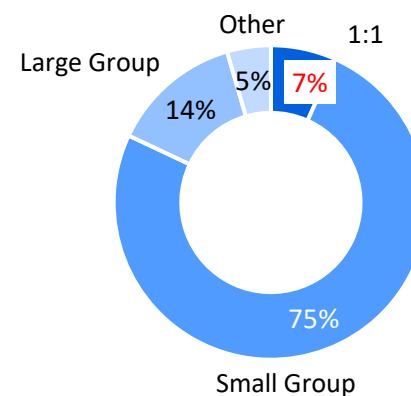
TOP SOCIAL MEDIA



CLASS FORMAT



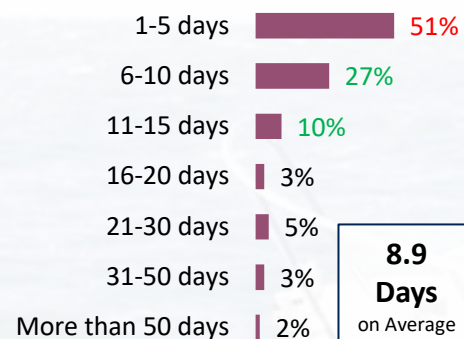
CLASS SIZE



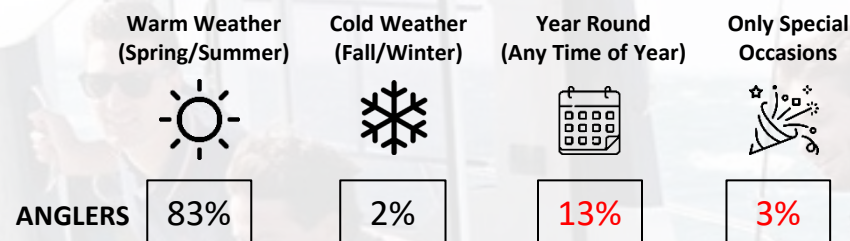
WHO THEY ARE: RELEVANT EXPERIENCE

ANNUAL FREQUENCY

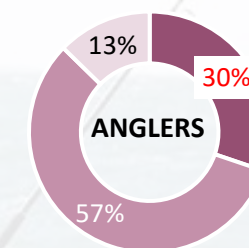
ANGLERS



TIME OF YEAR

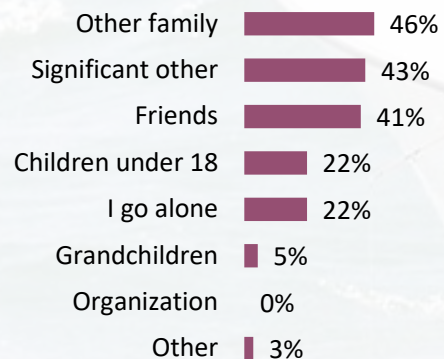


SKILL LEVEL

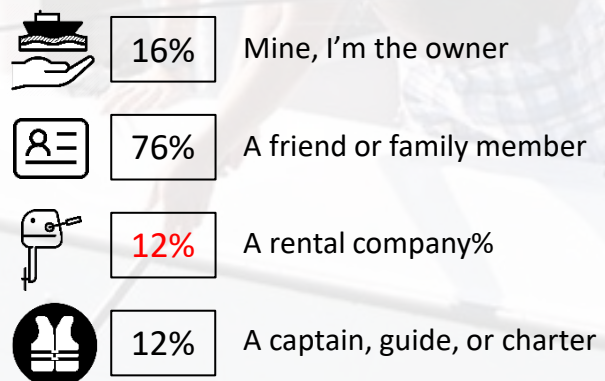


WITH WHOM

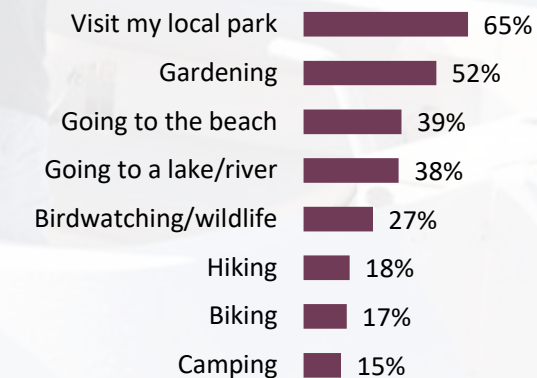
ANGLERS



RENT/OWN/FRIEND (BOATING-SPECIFIC)



OTHER PAST YEAR OUTDOOR ACTIVITIES



AMPLIFYING THEIR TAILWINDS: HOBBIES & GOALS



SHARE OF FREE TIME

40%

of awake time consists of 'free time' on average



TOP ACTIVITIES ENGAGE WITH IN FREE TIME

Solo Shared Both

Activity	Engage	Solo	Shared	Both
Watching movies at home	74%	45%	32%	23%
Cooking	56%	78%	14%	8%
Going to restaurants/bars	53%	9%	77%	15%
Leisurely physical exercise	50%	57%	18%	25%
Gardening/Yard work	50%	84%	14%	2%
Reading	46%	95%	0%	5%
Going for a drive	39%	35%	53%	12%
Physical exercise	27%	*	*	*
Home Renovation/DIY	26%	*	*	*
Going to the movies	25%	*	*	*
Doing puzzles	25%	*	*	*
Art & Craft Projects	24%	*	*	*

OUTDOOR INTEREST

-% Describes me Completely/Most of the Time-

53%

I enjoy participating in outdoor activities with my family

50%

I like many outdoor activities, but would not consider myself an 'avid outdoors-enthusiast'

39%

I enjoy the social and adventure aspects of outdoor activities

36%

I participate in outdoor activities for the adventure and excitement

32%

I enjoy being outdoors, but not necessarily doing outdoor activities

24%

I am avid about outdoor activities and would consider myself an outdoor enthusiast

TOP OUTDOOR MOTIVATIONS

-% Agree Completely/Agree Somewhat-

90%

Nice way to spend a day

89%

Relaxing

88%

Good way to spend time with friends

85%

Good way to create memories

84%

Helps me take care of my mental health

83%

Allows me to move my body/exercise

82%

Rewarding

81%

Teaches good values

77%

Takes me away from electronics

71%

Something I've always done

TOP PERSONAL GOALS

58%

Spend more time outdoors

53%

Spend more time with loved ones

50%

Exercise more

35%

Travel the US more

34%

Learn something new

34%

Appreciate the outdoors more

26%

Read more books

26%

Do/try more things/spend less time at home

21%

Spend less time on social media/computer

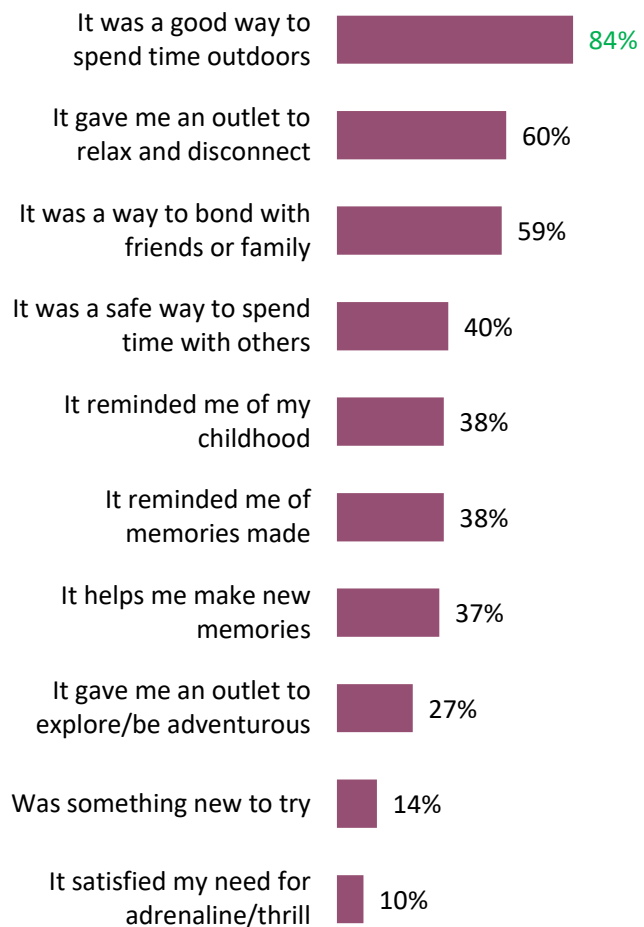
Base: Geographical Support (n=88) *Base too low to report (n<30)

Multiple Questions: Q19, Q20, Q21, Q22, Q 23, Q24

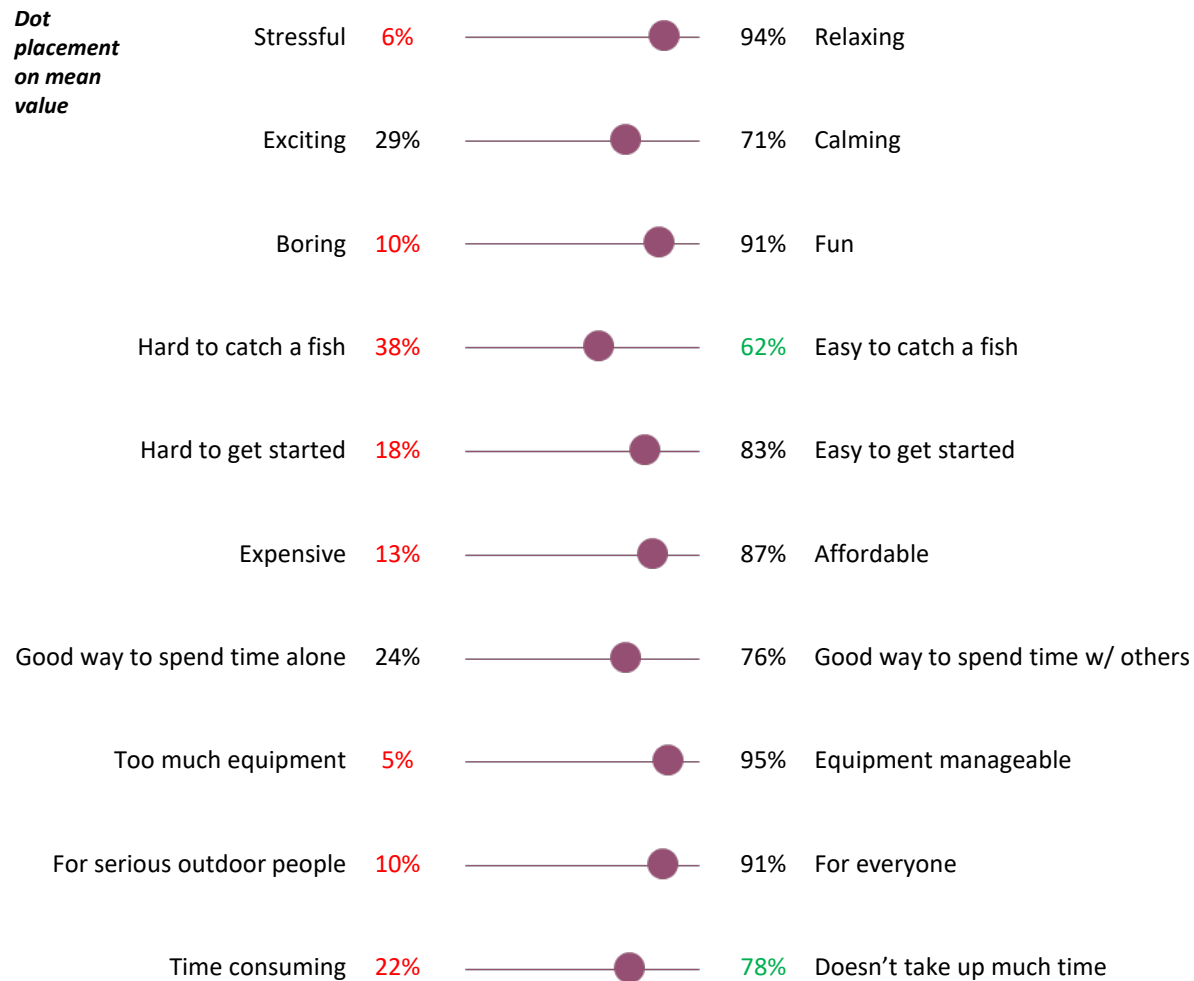
Green / Red Font Based on Significantly High / Low Index Compared to Total Average (Green > 120, Red < 80); Indexing reported if Total Average = 5%+

AMPLIFYING THEIR TAILWINDS: WHAT WOULD BRING THEM BACK TO FISHING

REASONS PARTICIPATED IN ACTIVITY



FIRST IMPRESSION MOMENTS



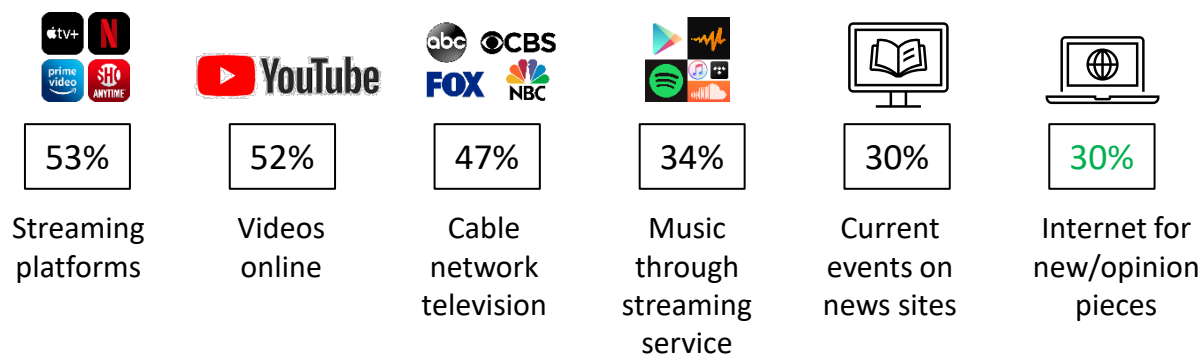
TAILWINDS



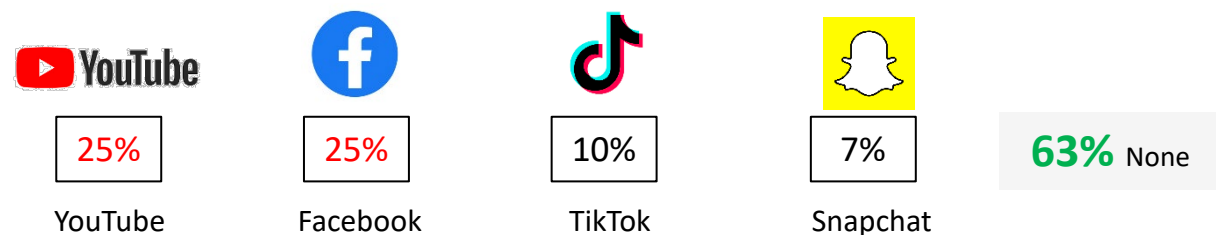
Base: Geographical Support Anglers (n=63). Note: not showing this slide for Boating due to low base size.
 Multiple Questions: Q10, Q11a, Q16a
 Green / Red Font Based on Significantly High / Low Index Compared to Total (Green > 120, Red < 80); Indexing reported if Total = 5%+

AMPLIFYING THEIR TAILWINDS: COMMUNICATIONS & LOGISTICS

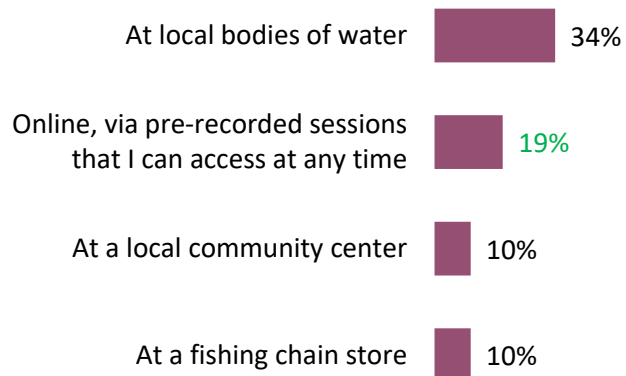
TOP MARKETING CHANNELS



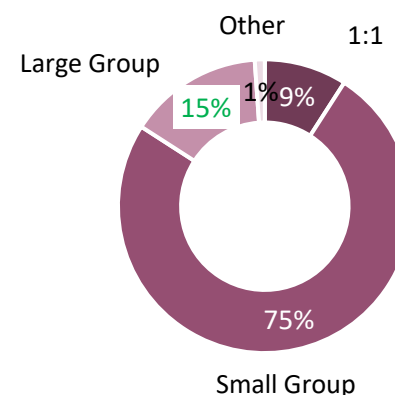
TOP SOCIAL MEDIA



CLASS FORMAT



CLASS SIZE



Thank You To Our Sponsors

American Sportfishing Association (ASA)
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