RBFF RETAIL CUSTOMER EXPERIENCE ASSESSMENT

EXECUTIVE SUMMARY AND ANALYSIS

August, 2014

Prepared for:

The Recreational Boating & Fishing Foundation

Alexandria, Virginia

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REPORT CONTENTS

RETAIL CUSTOMER EXPERIENCE ASSESSMENT
RECREATIONAL BOATING & FISHING FOUNDATION

I. OVERVIEW AND PURPOSE

The information contained in this report outlines the results of mystery shopping studies conducted by Market Viewpoint, LLC (MVP), headquartered in Pennsylvania, on behalf of The Recreational Boating & Fishing Foundation (RBFF). The purpose of these studies was to assess the current fishing and boating retail consumer shopping experiences to determine areas of opportunity to increase fishing license sales and boat sales in markets where there appear to be opportunities for growth, specifically the Hispanic community, the female demographic and the traditional family demographic.

II. PROJECT METHODOLOGY

The information presented in this section outlines the methods and procedures used by Market Viewpoint, LLC to conduct these studies.

<u>Preliminary Activities</u>

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

The first phase of the project was scheduled to begin in May 2014. During this phase, the evaluation instruments that would be used by the mystery shoppers were designed and refined, target cities were selected, mystery shoppers were vetted and trained, retail store categories were identified and stores within those categories were chosen to be shopped and loaded into the Market Viewpoint software. Stores in each market to possibly include in these studies were suggested by RBFF. MVP made phone calls to the stores to confirm they were open for business, their hours, if they carried fishing equipment and which sold fishing licenses. Boating retailers were also contacted for operational information. RBFF approved the final list. Due to the number of shops in some markets, not all stores suggested were shopped for this study. A full list of the suggested stores is included in this analysis under the tab, “Suggested Stores for the Studies”.

The second phase of the project began on May 31, 2014 and concluded on August 10, 2014. During this phase, mystery shopping assignments were assembled and distributed to appropriate mystery shoppers. Data was physically collected in the targeted stores in the targeted cities. The raw data reports were returned to Market Viewpoint, LLC's headquarters for processing and analysis.

The third phase of this research project began on August 11, 2014 with the analysis of the data and the creation of our final report of observations and recommendations.

Implementation Activities

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

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

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

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

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

STEP 4 – Conducting Store Evaluations
Mystery shoppers conducted their evaluations and prepared their reports. These were sent to our central office for quality control, processing, and distribution. This quality control process assured RBFF received accurate and timely information. Stores were visited weekly throughout Phase Two of this project (May 31 through August 10, 2014), with shoppers visiting on random days of the week and at random times. The reports highlight both existing strengths in each store's customer service and fishing gear or boating offerings, as well as areas where there is opportunity for improvement. The Market Viewpoint account management team tracked shopper assignments carefully and closely monitored the rate of return for completed reports.

Shoppers uploaded copies of receipts for purchases and fishing licenses to the reporting form for accuracy in reimbursement of expenses. Mystery shoppers were reimbursed for their expenses, and were paid for their time and report preparation by Market Viewpoint according to current market rates for these types of mystery shopping assignments. Boat shoppers were not required to make a purchase.

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

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

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

Targeted Areas of Study

Selected Cities/States:
The cities and states listed below were chosen for this study by the management of RBFF based on the fishing and boating activity conducted in these areas of the United States.

Texas:	**Florida:**
Houston	Orlando
Dallas	Tampa
	Miami

Types of Retail Stores Visited– Fishing Study

Big Box: i.e. Walmart

Sporting Goods: i.e. Dicks Sporting Goods, Sports Authority, Academy Sports

Outdoor Specialty: i.e. Bass Pro Shops, Cabela’s, Gander Mountain

Family Owned Stores: i.e. small mom & pop and independent shops

Types of Retail Stores Visited – Boating Study

Boating Chain: i.e. Bass Pro Shops, Marine Max

Family Owned: i.e. small mom & pop and independent shops

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

Experience Level:
Non-Experienced
Moderate Experience (Fishing Study only – combined with Experienced for Final Analysis)
Experienced

Scenarios Used By Shoppers (Fishing Study):

1. I have never fished before, what do I need?
2. I'm interested in getting a fishing license.
3. I have some fishing experience and am looking for new equipment.
4. I have some fishing experience and am looking for new places to fish. Do you know good places to go?

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

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

Scenarios Used By Shoppers (Boating Study):

1. I have never owned a boat.
2. I do or have owned a boat and want to upgrade.

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

1. Educating the consumer
2. Product suggestions
3. Product demonstrations
4. Shopper experience

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

Survey Instrument Category Definitions

Fishing Study

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

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

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

If the shopper told them they were new to fishing, the salesperson was evaluated on whether they asked if the shopper had a current fishing license, where they wanted to fish and if they were familiar with the types of equipment necessary to fish.

If the shopper told them they had fishing experience, the salesperson was evaluated on whether they asked if the shopper had their license for the year, where they fished most often and if they were looking for new equipment.

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

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

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

- Inviting the shopper to make a purchase
- Inviting the shopper to purchase a fishing license (if applicable)
- Offering fishing regulations after a fishing license purchase (if applicable)
- Educating the shopper on where collected fishing license dollars are used
- Requesting contact information for future mailings or for sharing with a state agency
- Offering information about fishing-related events or clinics.

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

The first question asked if the sections in the store were clearly marked so that the shopper could find the fishing equipment.

The second question was to discover how the fishing equipment was presented. Did the product packaging distinguish between beginner and intermediate skill level? Children versus family gear? Type of fishing conditions, such as fresh vs. salt water? Was there bi-lingual packaging? The shopper was to check any that applied.

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

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

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

Survey Instrument Category Definitions

Boating Study

First Impressions – Yes/No response from the shopper of whether or not they would be interested in purchasing a boat at the store based upon their immediate reaction upon entering the store; includes cleanliness, organization of product, range of options and appearance.

Greeting – Comprised of three questions. Were employees identifiable with attire or name tags; whether or not the shopper was approached by a salesperson or had to seek one out; and then once engaged with a sales person, the welcome and demeanor of the individual, including finding out their reason for shopping.

Needs Assessment – The first question was to find out if the salesperson asked if the shopper had currently or ever owned a boat.

If the shopper had never owned a boat, the salesperson was evaluated on whether they asked what kind of boating the shopper planned on doing, such as fishing, pleasure, cruising or watersports; what size boat they wanted to purchase; where they would be using the boat; how they would use the boat; and if they were familiar with different types of boats and motors.

If the shopper had experience with boats, the salesperson was evaluated on whether they asked what type of boat the shopper currently owned; why they were looking for a new one; and what type and size boat they were looking to purchase.

The third question rated the salesperson on whether they asked how the shopper intended to finance the purchase.

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

- Listening to customer's needs
- Treating the customer with respect
- Understanding the type of boat that customer wanted or needed to purchase
- Showing boats that matched the shopper's needs
- Display of knowledge about the boats
- Providing education about types of boats
- Allowing the customer to personally examine boats and get involved with the sale.

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

- Inviting the shopper to make a boat purchase
- Requesting contact information for future mailings or for sharing with a state agency
- Offering the shopper an opportunity to attend any upcoming boating-related events or clinics sponsored by the retailer.

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

The first question applied to a discussion of the boat. The shopper was to check if any of the following were mentioned:

- Safety features
- Warranty and guarantee information
- Features of the boat such as storage space, upholstery, etc.,
- Special considerations discussed such as winterizing, dock and storage fees, insurance, etc.

The second question evaluated if the salesperson presented information about the motor separately from the presentation of the boat.

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

The fourth question asked if the salesperson made his/her presentation primarily focused on the shopper's lifestyle, focused on the product, or presented the product with emphasis on both product and lifestyle.

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

- If the shopper felt welcomed, valued, and informed as a customer in that store.
- Would the shopper be inclined to make a boat purchase from that store.
- If the shopper would recommend the store to others.

Current General Retail Environmental Conditions

The shopping experience of today's consumer population is impacted by a combination of situations that exist, in general, within the retail environment. The conditions cited below are the result of data collected by the Market Viewpoint organization over the last 18 years of national operation. It is important to note these factors when analyzing the data resulting from the fishing and boating study.

- Unavailable store personnel – While consumers have been adjusting to the self-serve environment that exists on the sales floor of many retailers, there are still times when it is necessary and preferred to interact with someone on staff who is available. This is especially true in situations where the product being purchased is complex, the product is being purchased for the first time, or the consumer is seeking information about the product that only a knowledgeable employee can provide. In some situations, especially the Big Box experiences, employees cover multiple departments in an attempt to control labor costs. This practice leads to consumers having to find an employee for assistance only to discover that the employee is unable to help.

- Poor Product Knowledge – Another issue present in the retail environment is a lack of product training. The impact on the customer experience is profound. When customers' are unable to get answers even to basic questions about store products, they begin lose trust in the retailer and the brand they are attempting to purchase from this retailer.

- Lack of Customer Service and Sales Training – Many retailers opt to forgo customer service and sales training as a cost cutting measure and many who do train, fail to monitor whether or not the training is effective. What some retailers don't understand is that investing in employees in this way bonds employees to the organization, especially critical in retail, which tends to attract a part-time employee population. When bonded, employees see the importance of making the sale as necessary for a profitable business. They understand that a lost sale impacts them as well as the retailer.
- Employee Indifference – When there is no relationship, there is no loyalty. Too often in today's retail environments, consumers are expected to find products on their own (the self-serve concept) or they are ignored by task-centric employees. Attitudes of indifference negatively impact the customer experience. Customers can sense when an employee doesn't care about the sale. Mystery shoppers will often state this in their reports.

- Economic Impact on Disposable Income – Consumers are more cautious about spending since the recession despite the fact that some indicators suggest we are recovering as a world economy. Consumers are currently conditioned to look for sales and discounts.

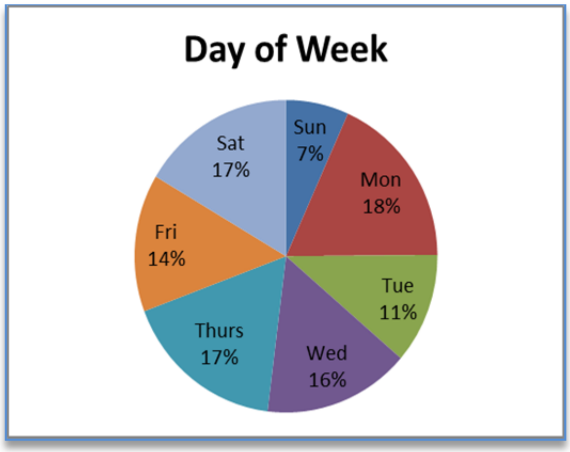
- Internet Sales – Despite privacy and confidentiality concerns, internet sales continue to grow. Some retailers are doing a great job of developing loyalty with their internet audience, while others have yet to grasp the opportunity to use the internet to its full advantage to engage, educate, and satisfy the consumer. Those retail operations that combine the internet and the bricks and mortar models of selling can make for a powerful sales and customer experience.

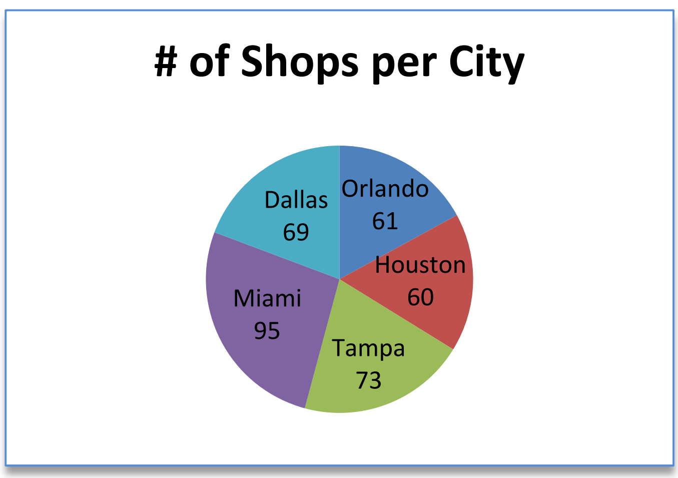
  The internet also plays a significant role in terms of pre-sale research done by the consumer even before they enter a brick and mortar location. This is especially true of the younger generations of shoppers in the marketplace.

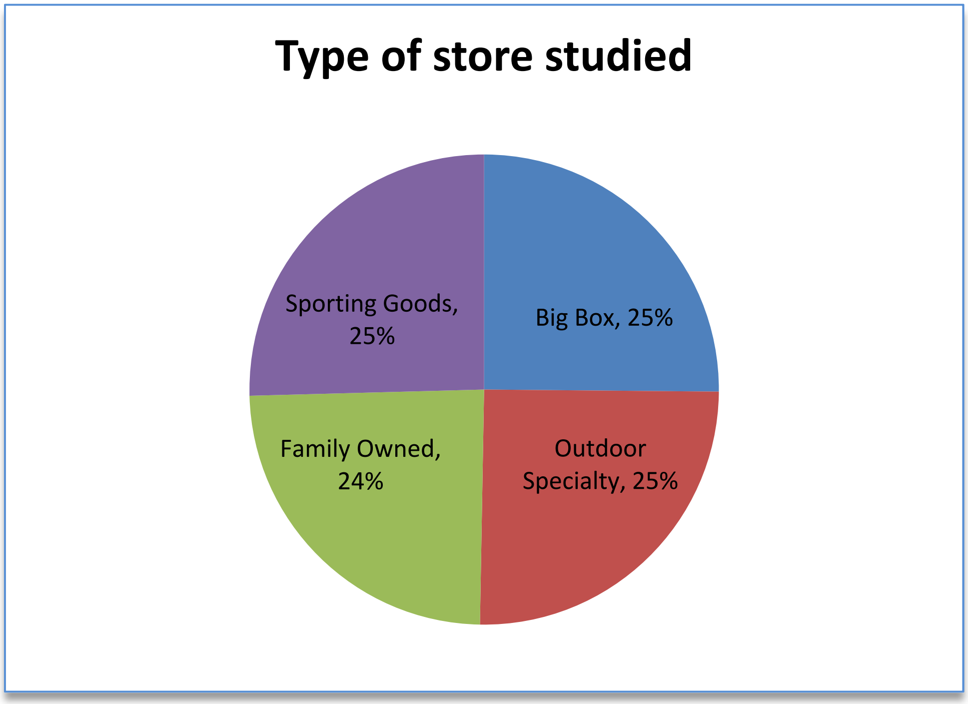
III. SURVEY RESULTS AND DATA SUMMARY

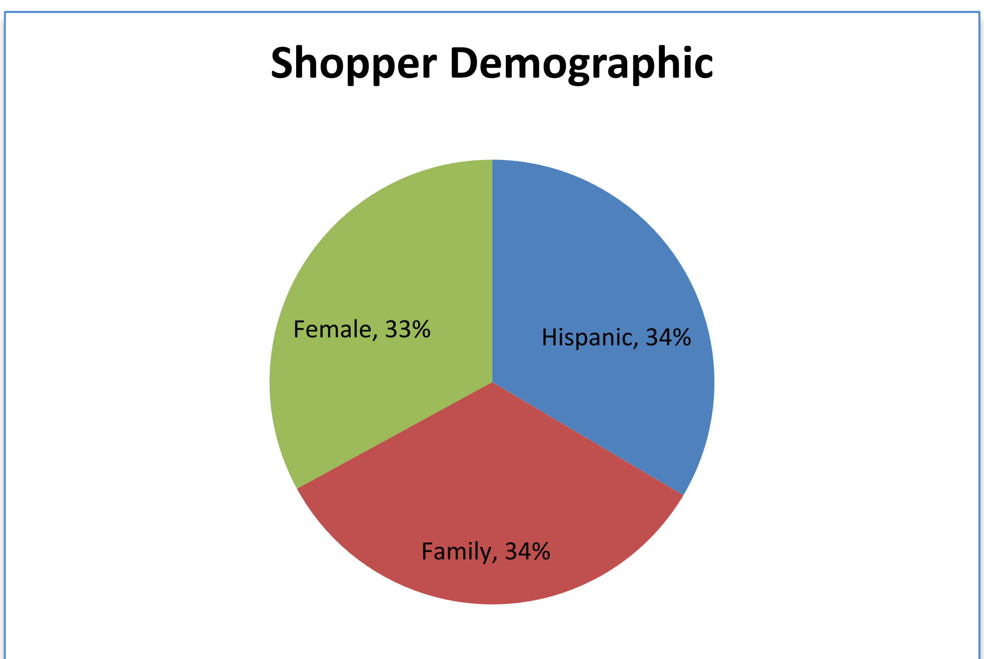
FISHING STUDY

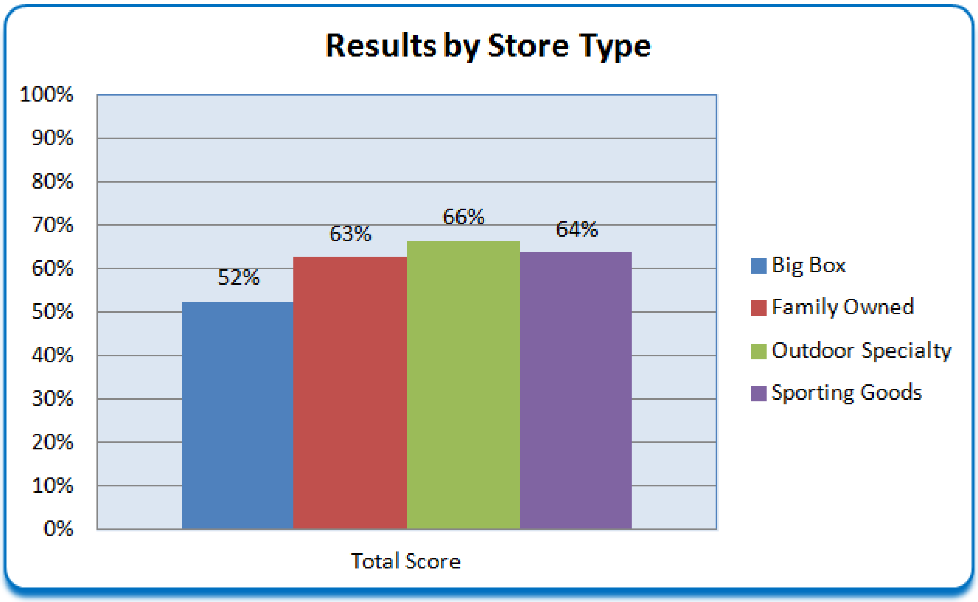
The information, charts, graphs, and commentary that appear below are related to the study conducted for the fishing industry.





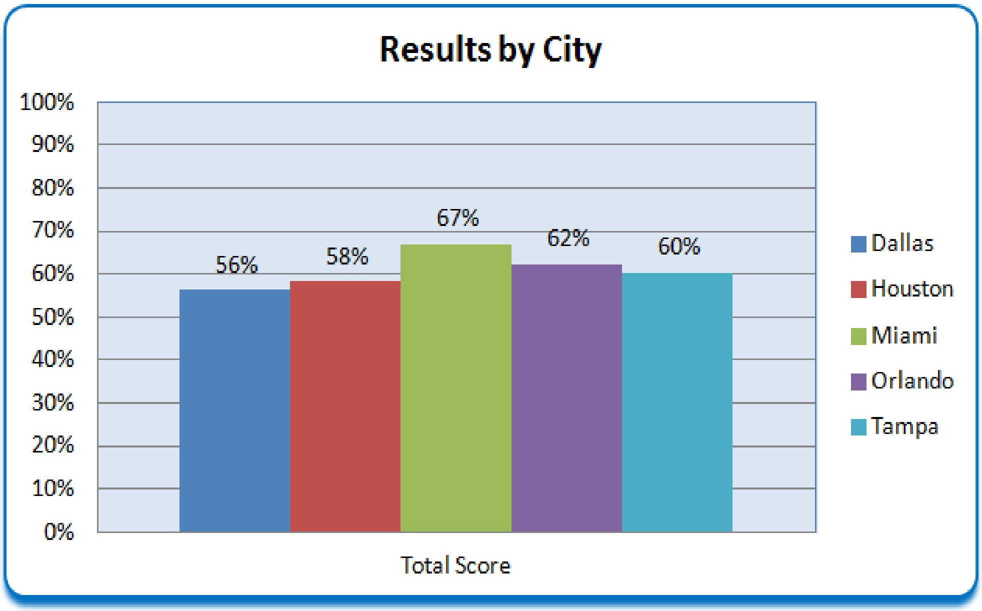

Type of store studied
Sporting Goods, 25%
Big Box, 25%
Family Owned, 24%
Outdoor Specialty, 25%


Shopper Demographic
Female, 33%
Hispanic, 34%
Family, 34%



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

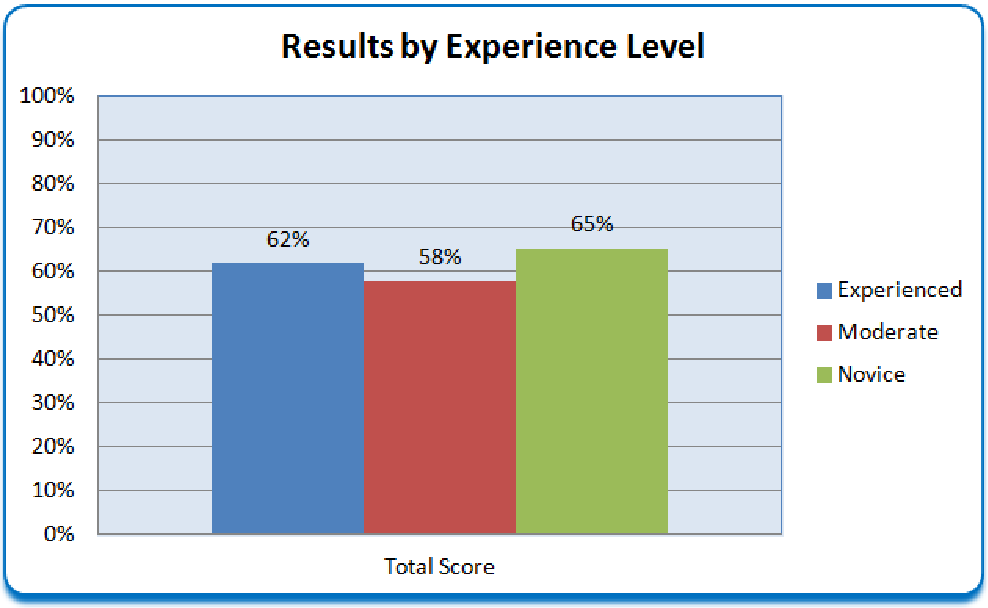
Comments: In ranking the total scores of the mystery shopping surveys by store type, it should be noted that there was no outstanding performer in overall experience ratings, in the retail type classifications included in this study. Outdoor Specialty (66%), which one might think would have an advantage over other classifications outperformed the next highest category, Sporting Goods (64%), by only 2 percentage points.



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

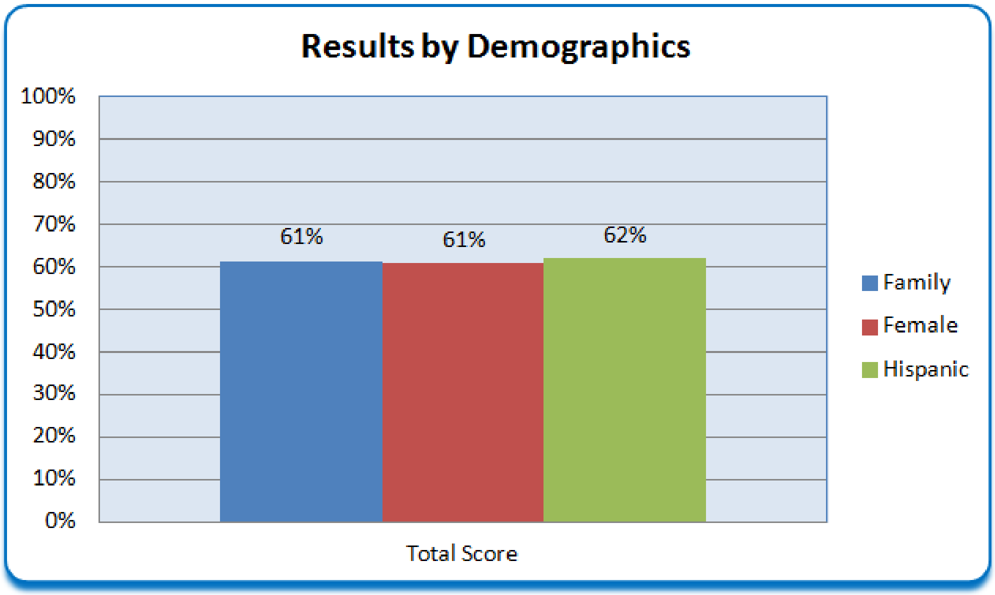
Comments: As with the Store Type graph, this graph of the total score percentages by city also demonstrated very tight tracking in terms of overall performance.

Statistical Note: Miami was assigned a greater number of shops to account for the larger sample necessary to account for the Hispanic population density in that city.



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

Comments: The experience level of the angler was another area of focus for this study. As with the type of stores evaluated, and the cities shopped, there is very little differentiation in total scores. There is a 7% difference, however, in total scores between the high and low in this category. Opportunities exist across the board to improve the consumer experience regardless of their experience level.



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

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

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

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

First Impressions

Question Detail

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

Comments: 86% of the shoppers had a favorable first impression of the fishing gear areas of the stores visited and would be interested in making a purchase.

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

Greeting

Question Detail

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

Comments: In 2% of the mystery shopper surveys (7), the consumer never interacted with a sales associate. Retailers should be concerned with this not only for the level of dissatisfaction it creates but also for security reasons. Also of concern is the wait time to interact with sales associates. 63% of the respondents (225) indicated that they had to wait three minutes or longer to be helped by someone in the fishing department at the stores they visited. Consumers value their time and when made to wait for service, consider this inconvenience a dissatisfier.

It should be noted that friendliness was strength for retailers in this section and continuing to hire people who genuinely like people is encouraged.

Needs Assessment

Question Detail

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

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

From the percentage of "Yes" responses, it appears as if the sales associates are not asking if customers have or need fishing licenses for the season. The areas of opportunity in the Needs Assessment category of the mystery shopping survey are certainly training sales associates to ask more questions to determine what the customer really needs to purchase for a satisfying and successful fishing season.

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

Sales Process Evaluation
Question Detail

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

Comments: Areas of strength in this Sales Process category include listening skills, treating the customer with respect, and developing an understanding of what the customer wanted or needed to purchase which is related to the ability to closely listen and not jump to conclusions.

The area where there appears to be the most opportunity to improve is with regard to the cross promotion of gear and equipment when someone is buying a fishing license, or cross promote fishing licenses when someone is buying gear.

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

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

Close

Question Detail

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

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

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

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

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

Retailers are missing the opportunity to create fun and educational experiences for anglers to continue to grow in their knowledge of the sport and enjoy everything that fishing has to offer.

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

Product Presentation

Question Detail

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

Comments: Stores included in this study did well in terms of clear and visible signage directing customers to the area of the store where they might find fishing equipment and products. Where there is opportunity in the department aisles is to separate the equipment, when possible, into areas of experience to enhance the consumer self-service experience that exists in many retail operations and which many consumers have come to expect in the retail environment.

Another area of opportunity for retail sales associates is to present the products they are recommending by pointing out the skill level on the packaging, if it exists. A note to manufacturers: Begin to provide this labeling information if you are not already doing so.

The final area for improvement is bi-lingual packaging. If growing the Hispanic market is of interest to the industry, packaging, aisle signage, and general store signage are important considerations in the communication process with the Hispanic population.

Overall Impressions
Question Detail

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

Comments: Despite areas needing improvement, many customers felt valued and would recommend the stores where they shopped to friends and family. The percentage of respondents answering “Yes” to the questions in this category may have done so because they felt valued, listened to, and understood, as evidenced in the Sales Process Evaluation category.

It should be noted however that “Yes” response ranges from 70% – 79% fall into the mediocre experience classification. The American public has come to expect mediocrity as the norm in their shopping experiences but as an industry, the question must be asked if this is what the industry wants and expects out of its manufacturing, distribution, and support channels.

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

Key Inquiries

New Angler License Inquiry

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

New Angler Where to Fish Inquiry

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

Comments: New anglers are only being asked 20% of the time if they have fishing licenses. They are only being asked half the time where they plan to fish.

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

Experienced Angler License Inquiry

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

Experienced Angler Where to Fish Inquiry

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

Comments: Experienced Anglers include those who fished a few times and were classified as “moderately” experienced, as well as those who considered themselves experienced anglers. The study shows that this population is not being asked if they have a license 92% of the time and they are not being asked where they plan to fish as evidenced by the 61% “No” response rate.

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

Educating the Customer

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

Comments: By store type and by growth segment demographic, education is happening only about half of the time. The fishing industry is dynamic in that there are always new products, regulations, environmental impacts, etc. that can be communicated to the consumer to help them become engaged in and enjoy the sport of fishing. Retailers are missing out on opportunities to teach and inform their customer, practices which could result in consumers purchasing more items or to buy at higher price points.

Product Suggestion

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

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

Comments: Sales associates are doing a fairly good job of matching products with the needs of the customer but are missing the opportunity to cross promote licenses and gear.

Product Demonstration

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

Was gear/equipment presented to distinguish between the beginner and intermediate fishing audiences?	Yes	No	n/a
Overall	35%	65%	-
Big Box Store	36%	64%	-
Sporting Goods Store	35%	65%	
Outdoor Specialty	43%	57%	-
Family Owned	28%	72%	-
Hispanic	33%	67%	-
Female	34%	66%	
Family	39%	61%	

Was gear/equipment presented to identify children's gear and family oriented equipment?	Yes	No	n/a
Overall	52%	48%	-
Big Box Store	62%	38%	-
Sporting Goods Store	58%	42%	
Outdoor Specialty	64%	36%	-
Family Owned	22%	78%	-
Hispanic	43%	57%	-
Female	57%	43%	
Family	56%	44%	

Was gear/equipment presented with packaging displaying the skill set of the intended purchaser (shows beginner, experienced, etc.)?	Yes	No	n/a
Overall	27%	73%	-
Big Box Store	26%	74%	-
Sporting Goods Store	29%	71%	
Outdoor Specialty	33%	67%	-
Family Owned	22%	78%	-
Hispanic	24%	76%	-
Female	24%	76%	
Family	34%	66%	

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

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

Comment: There are six individual questions in the survey instrument that are related to the key inquiry of Product Demonstration. Of these, the lowest was regarding bi-lingual packaging (9%). Being able to help a customer better understand a product and its use by pointing out bi-lingual information on the package may facilitate the sale, especially with the emerging Hispanic market. It may also give manufacturers, hoping to attract this emerging market, who package using the bi-lingual standard, an advantage over competitors.

Presenting equipment by type of fishing (fresh vs. salt water, fly fishing, etc.) was the highest rated question (63%) contributing to the Product Demonstration inquiry but there is still room for improvement in this area. Coupling the right equipment with the right type of fishing can only add to creating an enjoyable fishing experience for the customer. It also establishes credibility for the retailer to enjoy repeat business because the customer has confidence in what the sales representative is suggesting. Repeat business translates to higher profitability.

Shopper Experience

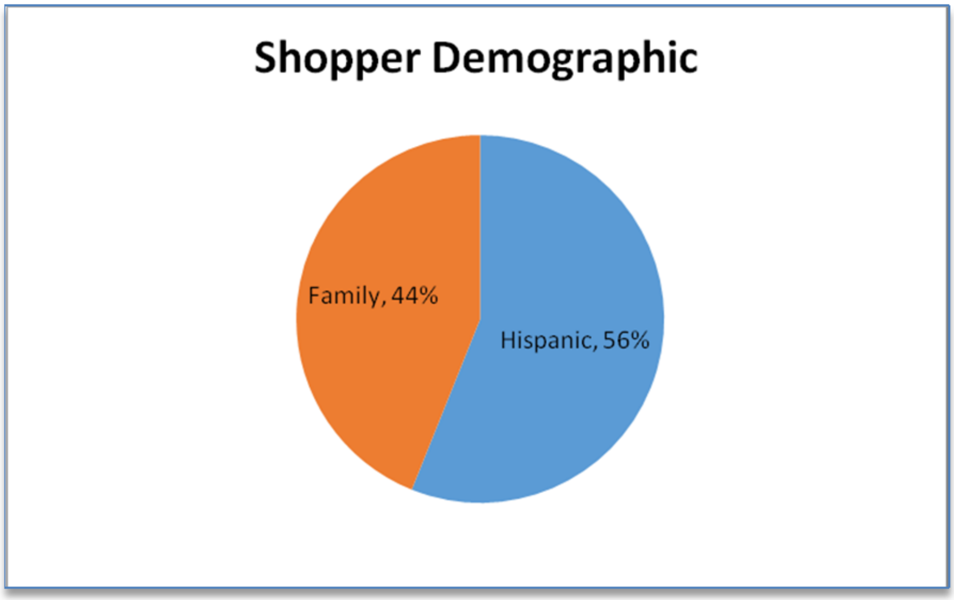
Did you feel comfortable shopping in this section of this store?	Yes	No
Overall	81%	19%
Big Box Store	77%	23%
Sporting Goods Store	84%	16%
Outdoor Specialty	84%	16%
Family Owned	78%	22%
Hispanic	81%	19%
Female	79%	21%
Family	83%	17%

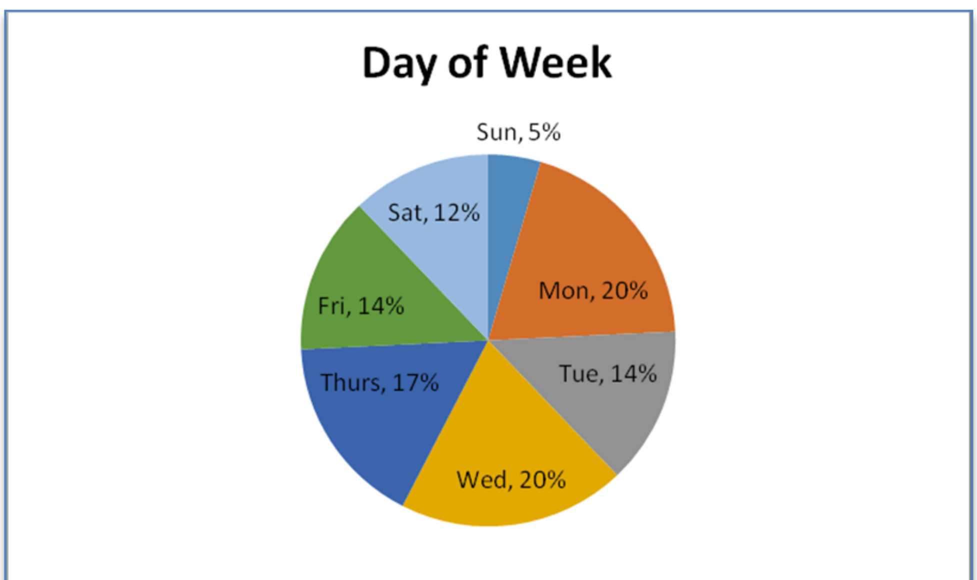
Did you feel welcomed, valued and informed as a customer in this store?	Yes	No
Overall	71%	29%
Big Box Store	53%	47%
Sporting Goods Store	75%	25%
Outdoor Specialty	79%	21%
Family Owned	78%	22%
Hispanic	73%	17%
Female	72%	18%
Family	69%	31%

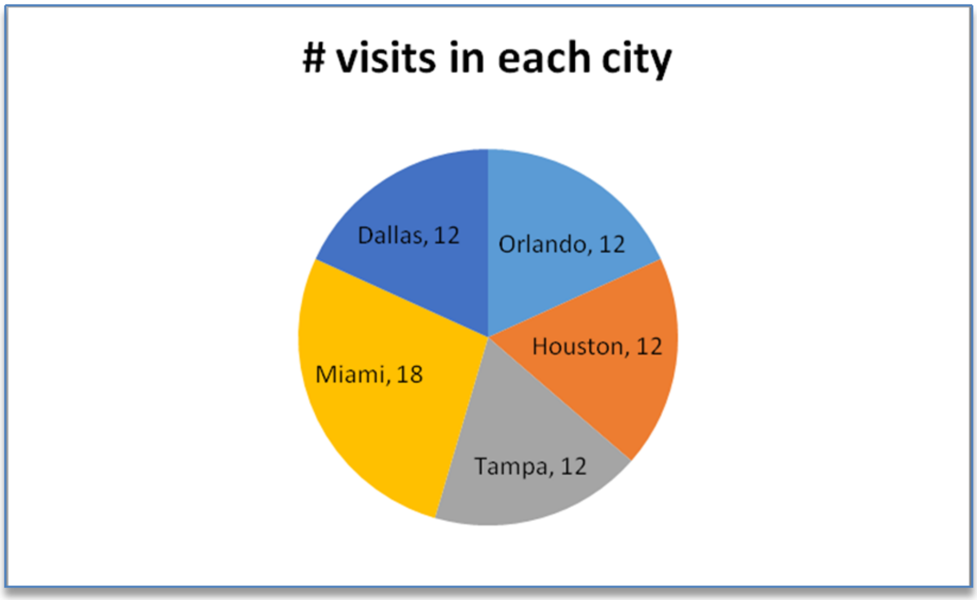
Comments: Overall performance in this key area of focus is good but opportunity for improvement exists. The Big Box Store category scored the lowest in terms of feeling valued and educated probably due to the self-serve nature of this environment.

BOATING STUDY

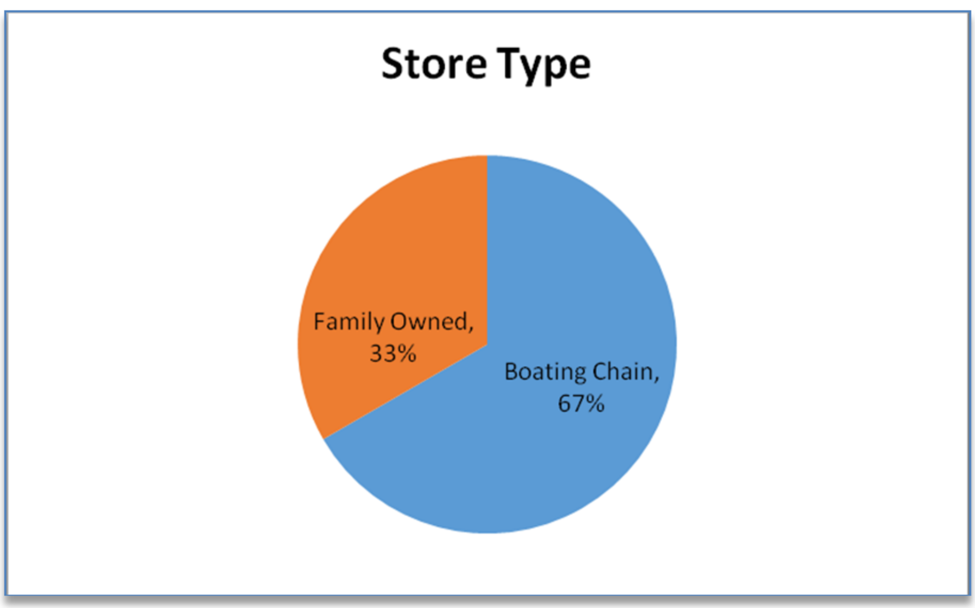
The information, charts, graphs, and commentary that appear below are related to the study conducted for the fishing industry.





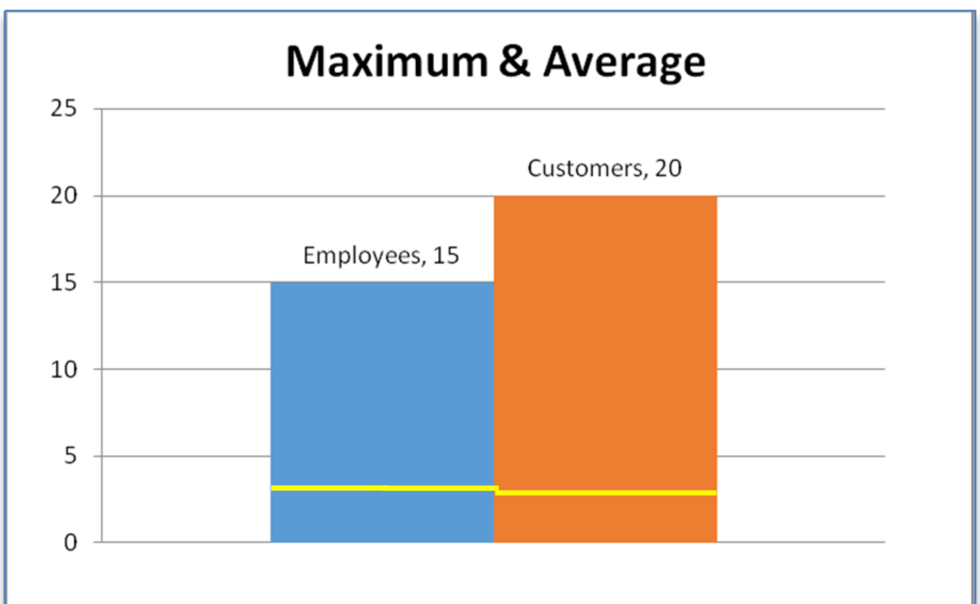


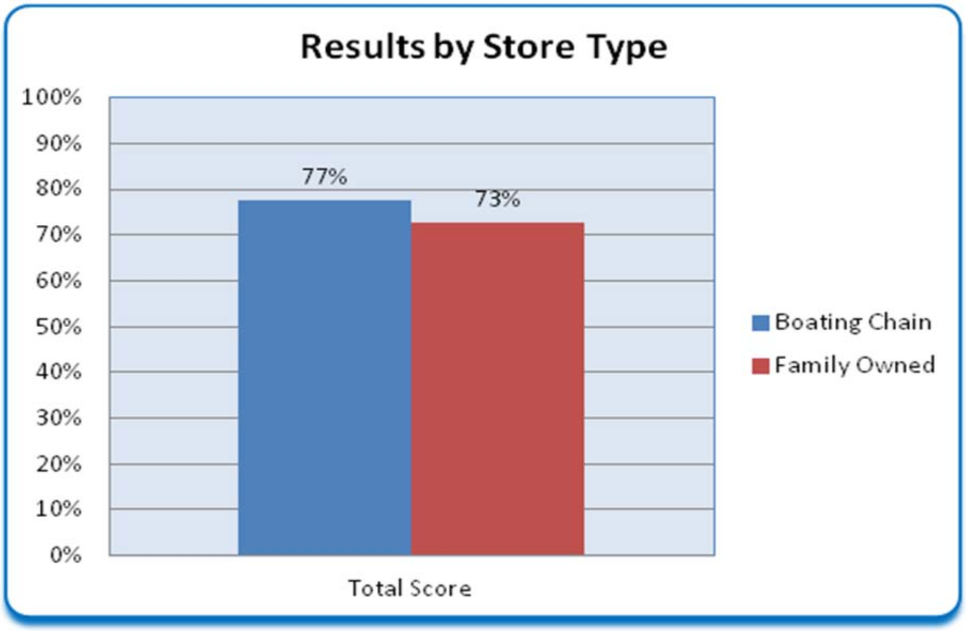
visits in each city
Dallas, 12
Orlando, 12
Houston, 12
Miami, 18
Tampa, 12



Store Type
Family Owned, 33%
Boating Chain, 67%

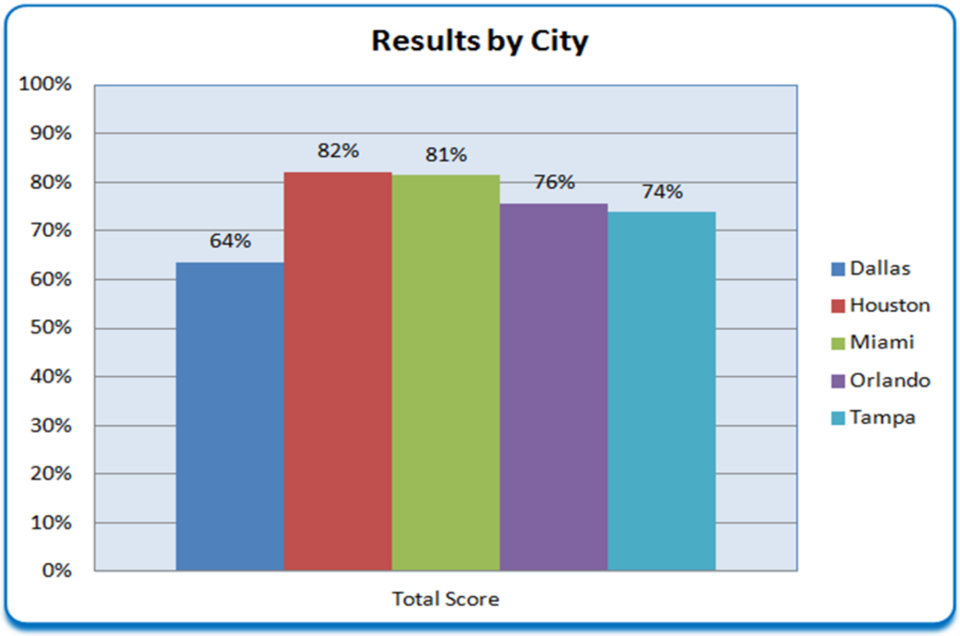

Experience Level
I do or have owned a boat, 39%
I have never owned boat, 61%


Maximum & Average
25
20
15
10
5
0
Customers, 20
Employees, 15



	44	22	66
	Boating Chain	Family Owned	Combined
First Impression	93%	68%	85%
Greeting	83%	86%	84%
Needs Assessment	80%	77%	79%
Sales Process Evaluation	91%	88%	90%
Close	47%	33%	42%
Product Presentation	60%	55%	58%
Overall Impressions	86%	73%	81%
Total Score	77%	73%	76%

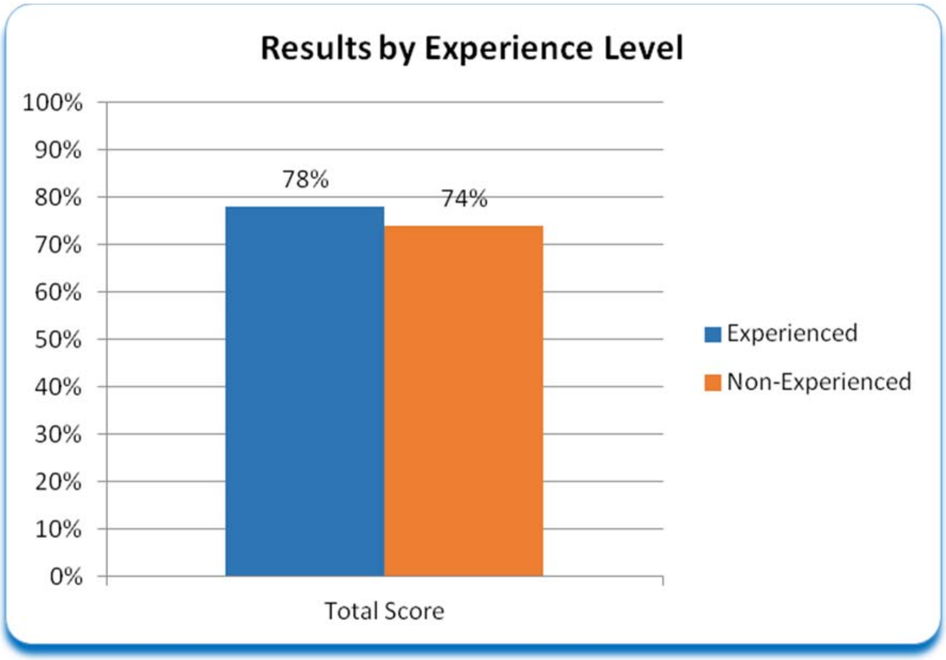
Comments: In ranking the total scores of the mystery shopping surveys by store type, it should be noted that there was no outstanding performer in overall experience ratings, in the retail type classifications included in this study. Boating Chain (77%) outperformed Family Owned (73%) by 4 percentage points.



	12	12	18	12	12	66
	Dallas	Houston	Miami	Orlando	Tampa	Combined
First Impression	75%	83%	94%	92%	75%	85%
Greeting	72%	87%	90%	86%	82%	84%
Needs Assessment	71%	85%	86%	80%	73%	79%
Sales Process Evaluation	79%	99%	91%	91%	90%	90%
Close	33%	36%	52%	42%	44%	42%
Product Presentation	40%	71%	66%	51%	60%	58%
Overall Impressions	61%	92%	87%	83%	81%	81%
Total Score	64%	82%	81%	76%	74%	76%

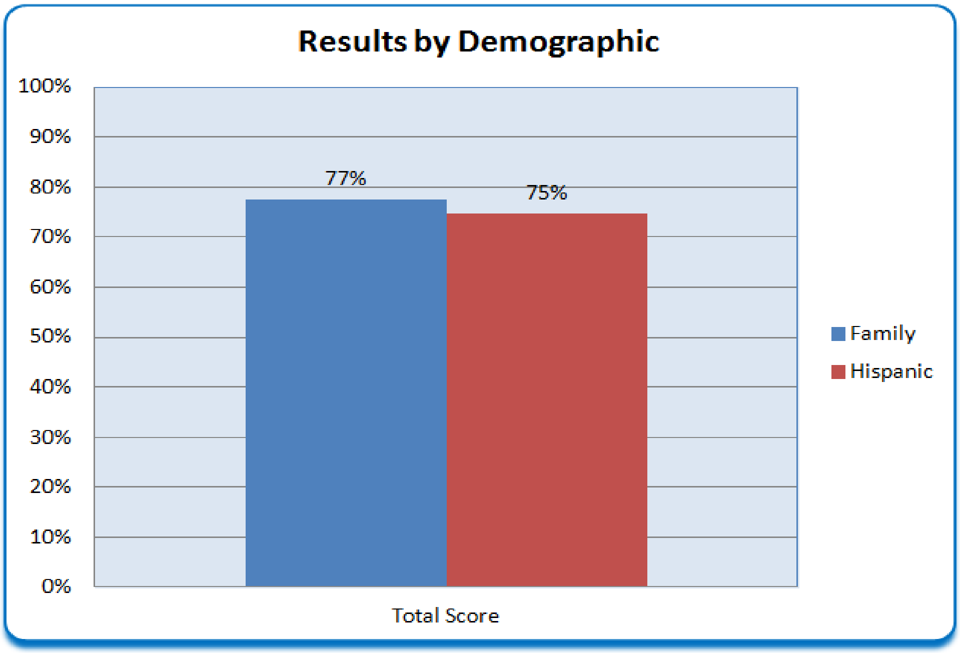
Comments: This graph of the total score percentages by city demonstrates an interesting pattern of the leading cities: Miami (82%) and Houston (81%) having a 1% difference in performance: Orlando (76%) and Tampa (74%) having a 2% difference in overall performance: and Dallas coming in last as it did in the fishing study. As in the fishing study, Dallas was the poorest performer at a 64% overall performance percentage.

Statistical Note: Miami was assigned a greater number of shops to account for the larger sample necessary to account for the Hispanic population density in that city.



	25	41	66
	Experienced	Non-Experienced	Combined
First Impression	92%	80%	85%
Greeting	90%	80%	84%
Needs Assessment	83%	77%	79%
Sales Process Evaluation	90%	90%	90%
Close	51%	37%	42%
Product Presentation	52%	62%	58%
Overall Impressions	85%	79%	81%
Total Score	78%	74%	76%

Comments: The total scoring difference between experienced and non-experienced shoppers is unremarkable.



	29	37	66
	Family	Hispanic	Combined
First Impression	93%	78%	85%
Greeting	87%	82%	84%
Needs Assessment	81%	78%	79%
Sales Process Evaluation	94%	86%	90%
Close	38%	46%	42%
Product Presentation	56%	60%	58%
Overall Impressions	85%	78%	81%
Total Score	77%	75%	76%

Comments: There is very little differentiation between the Hispanic and Family demographic in total report scoring.

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

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

First Impressions

Question Detail

	Yes	No
1. From your very FIRST impression of entering this store, would you be interested in purchasing a boat here? (look at cleanliness, organization, range of options, etc.)	85%	15%

Comments: 85% of the shoppers had a favorable first impression of the boating stores visited for this study. There is an interest in making a purchase based on what they saw in terms of cleanliness, organization, range of equipment options, etc.

Note that first and last impressions in the retail environment are critical and the most memorable parts of consumer shopping experiences. The first impression sets the stage for the sale and the last impression is the memory that will stick with the consumer long after they have left the boating showroom, since it is at this point in the transaction that they are most vulnerable.

Greeting
Question Detail

	Yes	No
When you first entered the store or showroom, were employees clearly identifiable with store attire and/or name tags?	83%	17%
Greeted by a sales person within 8 minutes	74%	26%
The sales person was friendly	97%	3%
Their opening was inviting, friendly	85%	15%
Made me feel at ease	83%	17%
Determined my reason for shopping here	82%	18%

Comments: The greeting process for all store types is strength with the friendliness of the sales associated the strongest part of this process. Further studies may want to address the amount of time a boat shopper is willing to wait to see a sales associate.

Needs Assessment

Question Detail

	Yes	No
Did the employee ask if you (or your family members) currently or ever owned a boat?	80%	20%
If you told the sales person you never owned a boat, did they ask what type of boating you will be doing?*	86%	14%
If you told the sales person you never owned a boat, did they ask about size of boat?*	81%	19%
If you told the sales person you never owned a boat, did they ask where you will be boating?*	60%	40%
If you told the sales person you never owned a boat, did they ask your familiarity with different types of boats?*	47%	53%
If you told the sales person you currently or have owned a boat, did the sales person ask what type of boat you own or owned?*	74%	26%
If you told the sales person you currently or have owned a boat, did the sales person ask why you are looking for a replacement?*	70%	30%
If you told the sales person you currently or have owned a boat, did the sales person ask type and size of boat you are looking for?*	91%	9%
4. Did they ask how you intended to finance the purchase?	35%	65%

Comments: A strength of sales associates in all store types is their skill in asking if an experienced boat owner knows what type and size boat they are looking to purchase.

An area for improvement is with the non-experienced boat owner in determining their level of familiarity with the different types of boats available.

For all experience levels, sales representatives are not engaging in a conversation about how the consumer intends to finance the water craft. They may be missing the opportunity to talk about the various options that exist for a major purchase of this nature as exists in the automotive industry.

*Calculations for this question include only those answering this question, not the entire study population.

Sales Process Evaluation

Question Detail

	Yes	No	n/a
Did the sales person listen attentively to your needs?	89%	11%	-
Did the sales person treat you with respect?	98%	2%	-
Did the sales person understand the type of boat you needed/wanted to purchase?	88%	12%	-
Did the sales person show you boats that matched those needs?	91%	9%	-
Did the sales person appear knowledgeable about the boats?	94%	6%	-
Did the sales person provide education about the boats?	83%	17%	-
Did the sales person allow you to handle and examine the boats?	85%	15%	-

Comments: Areas of strength in the boating sales process category include listening skills, treating the customer with respect, and developing an understanding of what the customer wanted or needed to purchase which is related to the ability to closely listen and not jump to conclusions.

Often times, a consumer is willing to overlook areas of mediocre service if they felt listened to, understood, and respected by the sales associate.

Close

Question Detail

	Yes	No
Did the sales person invite you to purchase a boat today?	53%	47%
Did the sales person request contact information (email address, mailing address)?	47%	53%
Offer the opportunity to attend any upcoming boating-related events/clinics that will take place or be sponsored by the retailer?	27%	73%

Comments: In almost half of the sales situations, sales representatives are not asking for the sale nor are they asking for contact information so they can keep in touch with prospects through their marketing efforts. Retailers are losing valuable opportunities to further engage and develop a relationship with their customers by failing to collect demographic information.

Product Presentation
Question Detail

	Yes	No
Were safety features presented?	56%	44%
Was warranty and guarantee information told to you?	55%	45%
Were all of the features of the boat pointed out to you? (storage spaces, upholstery, etc.)	80%	20%
Were any special considerations discussed? (winterizing, dock & storage fees, insurance)	36%	64%
Was the motor presented separately from the boat?	35%	65%
Did you feel comfortable shopping in this section of this store?	88%	12%
Did the experience and interaction with the salesperson emphasize: the boating lifestyle or was it more product-focused?		
Boating Lifestyle	6%	
Product focused	32%	
Both lifestyle and product focused	61%	
No discussion	2%	

Comments: Safety features are being presented only slightly more than half the time in the sales process. The same is true about warranty and guarantee disclosures. The area of concern is that the special considerations of insurance, storage fees, winterizing, etc. are not being addressed in the sales process.

Overall Impressions

Question Detail

	Yes	No
Did you feel welcomed, valued and informed as a customer in this store?	79%	21%
Would you be inclined to make a boat purchase from this store?	82%	18%
Would you recommend this store to friends and family for their boating needs?	83%	17%

Comments: Despite areas needing improvement, many customers felt valued and would recommend the stores where they shopped to friends and family. The percentage of respondents answering “Yes” to the questions in this category may have done so because they felt respected, listened to, and understood as evidenced in the Sales Process Evaluation category.

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

Key Inquiries

Education

Did the salesperson provide education about various types of boats?	Yes	No
Overall	83%	17%
Boating Chain	86%	14%
Family Store	77%	23%
Family	90%	10%
Hispanic	78%	22%

Comments: There is an obvious difference in the chain versus family owned store consumer education process as well as an even slightly greater difference between the Family and Hispanic demographic, although all are doing reasonably well in this focused area of the study.

Product Suggestion

Did the sales person show you boats that matched those needs?	Yes	No
Overall	91%	9%
Boating Chain	91%	9%
Family Store	91%	9%
Family	93%	7%
Hispanic	89%	11%

Comments: The chain store and family owned stores are doing well in the product suggestion category, with no significant difference in the demographic categories. This correlates to the listening skills question where sales associates scored 89%.

Product Demonstration

Allow you to personally examine the boats to get you involved in the sale?	Yes	No
Overall	85%	15%
Boating Chain	84%	16%
Family Store	86%	14%
Family	86%	14%
Hispanic	84%	16%

Were safety features presented?	Yes	No
Overall	56%	44%
Boating Chain	59%	41%
Family Store	50%	50%
Family	62%	38%
Hispanic	51%	49%

Were all of the features of the boat pointed out to you?	Yes	No
Overall	80%	20%
Boating Chain	80%	20%
Family Store	82%	18%
Family	79%	21%
Hispanic	81%	19%

Comments: While safety is important for safety's sake, it should be noted that it is also an important part of the sales process, with only slightly more than half of the potential customers being presented with these features. This is an area of potential improvement. While all of the features of the various models of boats being demonstrated may or may not have been pointed out, it is the perception of the majority of respondents that they actually were.

Shopper Experience

Did you feel comfortable shopping in this section of this store?	Yes	No
Overall	88%	12%
Boating Chain	91%	9%
Family Store	82%	18%
Family	97%	3%
Hispanic	81%	19%

Did you feel welcomed, valued and informed as a customer in this store?	Yes	No
Overall	79%	21%
Boating Chain	80%	20%
Family Store	77%	23%
Family	86%	14%
Hispanic	73%	27%

Comments: Overall performance in this key area of focus is good, but there is a distinct difference in the demographic breakdown that is noteworthy.

Observations, Recommendations and Next Steps

RBFF was provided in-depth observations and recommendations as a result of the study. Included below are general observations and recommendations for both the fishing and boating components.

FISHING and BOATING Study Observations

Analysis of the data reveals that evaluations were conducted evenly throughout the week. This helps to eliminate part-time vs. full-time employee bias when reporting the results. The evaluations were also evenly distributed by store type, by city, and also by targeted demographic groups.

1. Educating the consumer

    - Fishing - Only happening about half of the time; store associates need to have the latest information regarding new products, services, regulations, etc. to help them communicate effectively to the consumer

    - Boating – Obvious difference between chain versus family store in terms of the consumer education process and an even greater difference between non-Hispanic family and Hispanic demographic, although all are doing reasonably well compared to the fishing study. With a 12% difference between the Hispanic (78%) and non-Hispanic family (90%), one might wonder if store associates are pre-qualifying prospects or if some prospects fail to demonstrate interest by asking questions for fear of showing vulnerability

2. Product suggestions

    - Fishing – Store associates are missing the opportunity to cross-promote licenses and fishing equipment (one-stop shopping). New and experienced anglers are not being asked if they have a license.

    - Boating – Shoppers felt store associates did a good job of matching the appropriate boat with their needs (91%); this is a strength in the TX and FL studied markets

3. Product demonstrations

    - Fishing – Employee sales training that encourages associates to allow customers to touch, hold, practice with desired equipment seems to be a tangible potential solution. Presenting equipment to appeal to different skill levels and demographics (bi-lingual) is another recommendation.

- Boating – Similar to the fishing study, employee sales training can and should include the importance of allowing customers to touch, hold and practice with the equipment, especially with the safety factor with a boat purchase.

4. Shopper experience

    - Fishing – Overall, shoppers felt comfortable in the stores shopped and felt valued and informed (71%), with no remarkable difference among demographics, however there is room for improvement.

    - Boating – Overall, shoppers felt more comfortable with their experiences (versus fishing), with 88% indicating satisfaction. There was also a 16% difference between the Hispanic (81%) and non-Hispanic family (97%) segments regarding comfort, signifying an opportunity that should be addressed.

This report also reveals an opportunity for state **fish & wildlife agencies** in terms of educating license vendors on the importance of license sales/dollars, fishing regulations and fisheries management, to maximize the opportunity for license sales.

General Recommendations

- Employee sales and customer service training
    - Greet within first minute
    - Determine customer needs
    - Product knowledge
    - Cross-train personnel
    - Cross-sell products (licenses, equipment)
    - Ask for the sale
- Consider mystery shopping program (retailers, distribution channels)

Next Steps

RBFF is working to establish a method to allow for confidential sharing of retailer-specific results, if desired, and will be unveiling project next steps in the coming months.