



The Psychology of Churn:

Why Boaters & Anglers Lapse and
How to Get them Back

RBFF WEBINAR

SEPTEMBER 12, 2024

Agenda

01 – Welcome & Housekeeping

Rachel Auslander, RBFF

02 – Opening Remarks

Dave Chanda, RBFF

03 – Why Prioritize Churn?

J.D. Strong, RBFF

04 – Research Presentation

Stephanie Don, Ipsos

Sarah Mittal, Ipsos

05 – Key Takeaways

J.D. Strong, RBFF

06 – Q&A and Closing

Rachel Auslander, RBFF

Joanne Martonik, RBFF

Today's Speakers



Stephanie Don
Vice President

Market Strategy &
Understanding



Sarah Mittal
Director

Behavioral Science

Opening Remarks



Dave Chanda
RBFF President & CEO

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**AMERICAN
SPORTFISHING
ASSOCIATION**



**GRADY-WHITE
BOATS**



Why Prioritize Churn?

Why Is This Important?

THE LEAKY BUCKET



MONEY TALKS

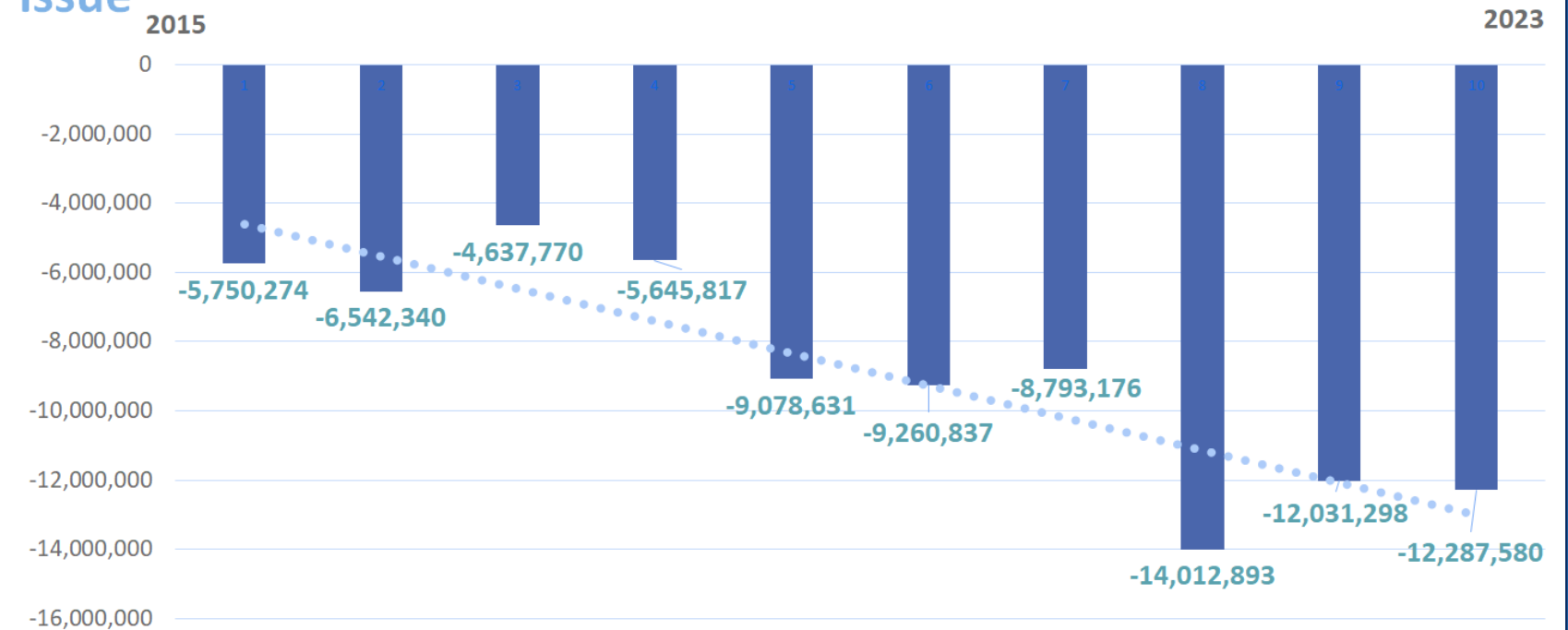
Average Spend Per Angler= \$1,500

- ~\$1,000 per female participant
- ~\$1,700 per male participant
- Retaining just ½ of 2023's lost anglers = **\$9.2 billion in revenue!**



Fishing

Attrition Up Slightly YOY Remains a Big Participation Issue



Why Is This Important?

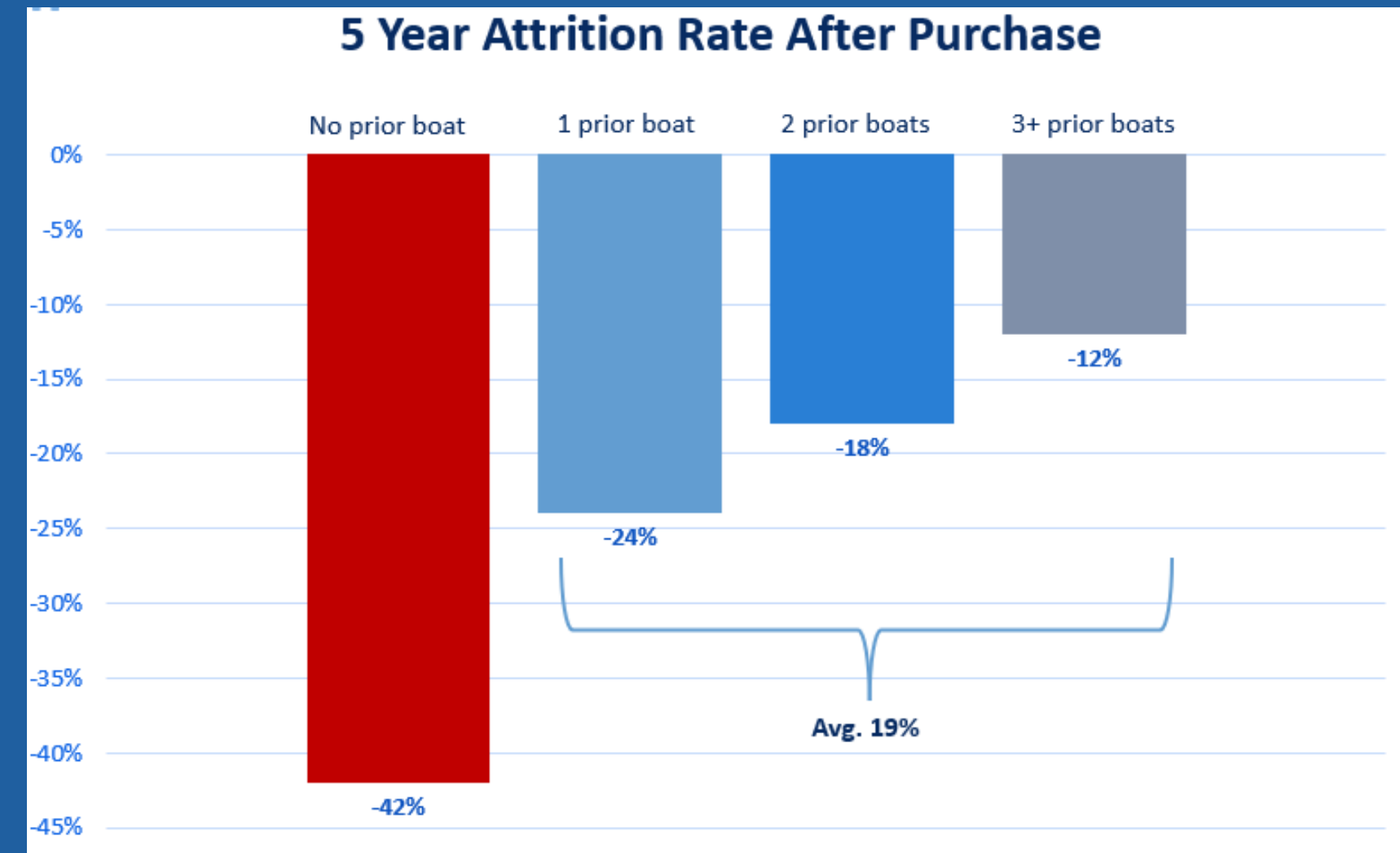
Boating Participation: An estimated 85 million Americans went boating in 2023, down from about 100 million in 2020.

Boat Sales: From a 13-year high of 320,000 new units sold in 2020, fewer new boats are being sold, with an estimated 260,000 units in 2022 and 180,000 units in 2023. Both new and used boat sales are trending downward.

First-Time Boat Buyers Bailing Out: Research shows that almost half of first-time boat buyers dropped out of boating after 5 years, so retaining existing participants is key.



Boating



It's Sensible Business: Loyal Customers Lead To Growth

THEY SPEND MORE

Research found that **existing customers are 50% more likely to try new products and spend 31% more**, on average, compared to new customers.

LIKELY TO MAKE THE SALE

According to *Marketing Metrics*, the probability of **selling to an existing customer is up to 14 times higher** than the probability of selling to a new customer.

INCREASES PROFITS

Bain & Company and Harvard Business School report that **"increasing customer retention rates by 5% increases profits by 25% to 95%."**

ACQUISITION COSTS UP

New customer **acquisition costs have increased by almost 50%** in the past five years.

Acquiring a new customer is anywhere from five to 25 times more expensive than retaining an existing one.
(Harvard Business Review)

Research Background

Research Background

WHY: Annual increases in lapsed participants.

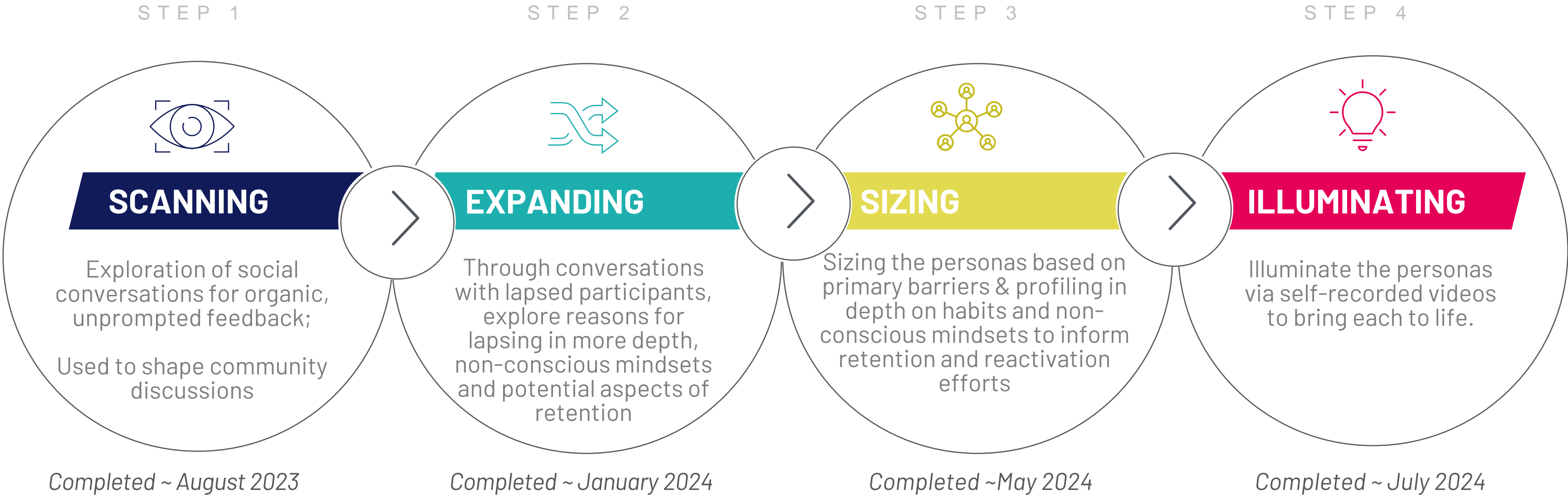
GOAL: Provide strategic recommendations and tactics to drive participant retention.

HOW: Deeper look into the psychology and behavioral science behind what makes it easier to trade boating and/or fishing for other activities via a four-phase, year-long research study.

OUTPUT: Personas of those most likely to lapse which may guide both RBFF and our stakeholders in retention-related activities and outreach.



The complete research program included 4 phases of research



Online conversations were scanned, analyzed and synthesized into themes for further exploration in Phases 2 and 3

Long-Term Engagement

Anticipation of upcoming fishing seasons drove attention around the sport.

- Basin trout and deep-sea fishing trips** were most popularly promoted, while preferred summer season fishing locations and excitement for the fall fishing season were shared.
- Race tournaments and competitions** drove volume and engagement, while cheating scandals contributed to frustration.
- Influencer @The_FishGuys garnered high positive interactions after catching an exotic moray eel as followers applauded and celebrated the rare catch.
- Anticipation for walleye and ice fishing season drove winter season conversation, as people shared fishing trip plans, gear needed, and lived experiences via forums and vlogs.
- Dads celebrated Father's Day with fishing trips, as they showcased gifted gear and thanked their fathers for introducing them to the sport.

Top Themes on Social

Anglers value social for building community as well as a source for advice seeking and sharing.

Sharing Experiences & Online Community Connections

- Anglers showcased fishing experiences, engage with peers, and generally share their love for fishing.

Information, Advice Seeking, & Recommendations

- Anglers also exchanged advice and recommendations about gear, fishing spots, and how to get into the sport.

Top Themes Across Fishing Experience Discussion

Theme Categories

- Showing Experiences & Community Engagement
- Information & Advice Seeking

"Always wanted to go fly fishing looks fun! Going to have to try it" - (YouTube)

"Hello everyone, I'm new to fishing and I'm looking for expert advice : I want to fish with lures on a decent sized lake which is not deep and has a lot of algae..." - (Reddit)

Barriers of Fishing

Lack of knowledge was a barrier for beginners; experienced anglers struggled with timing, location access, and boat access.

Next Steps

Key Questions for Community Phase 2 & Quant Survey Phase 3 Research

To Explore Further via Qual

- What other **social identities** are salient when considering/going angling—and how does the activity affirm this sense of self? (e.g. Busyness, parent/grandparent, angler, active, outdoorsy)
 - For **"being too busy"** in particular, what are the key constraints/barriers that drive them to weigh or choose other activities over angling?
- Further delve into alternative **"goals" beyond catching fish**.
- Are **consumers aware of the resources available** for novice anglers? **Where do they current turn to and what concrete information do they seek?** What are some of the key pain points in terms of touchpoints/information?
- What opportunities exist to generate a **sense of "community"** for new anglers? (e.g., would they attend a fishing tournament if beginners were assigned a guide / help to get started, are there other local groups that already exist that angling could be built into?)
 - What role do influencers play and who might they be?

To Quantify and Strategize Against

- How widespread are these initial themes? (drivers, barriers, social identities)
- Are there **key moments** that have driven them towards attrition (e.g., are they these first impressions/experiences or peak moments or a combination)?
- How can comms **bring to life** some of these other goals/benefits sought? And, what **mindsets** should be prioritized? Research shows that when **language and imagery match mindsets, engagement and likelihood of purchase/action increase**.
- What are consumers' awareness of and perceptions around the **conservation and sustainability initiatives supported by RBFF and license fees?**
- What **seasonal and other occasion cues** exist that can be leveraged as key communication opportunities?
- How might key **consumer segments** differ in terms of their goals, barriers and social identities (**promotion/prevention motivational mindsets etc.**) for angling (are there other key mindsets/individual differences that come to life in the community discussions)?

In phase 2, a Pop-Up Community allowed for depth learning, revealing key memories and reasons for participating as well as for lapsing

Ipsos Fresh Lab Community
SYNDICATED U.S. GEN POP COMMUNITY FOR AGILE INSIGHTS DISCOVERY

Gain turnkey access to in-depth insights in a fast-changing consumer environment.
Recruited, profiled, and fully engaged.

Ipsos Communities feature a robust suite of qualitative and quantitative research tools.
The platform incorporates state-of-the-art technology and analytics.

DESKTOP VIEW

METHODOLOGY:
Screener Survey followed by two Online qualitative discussion boards fielded on Ipsos US Syndicated community.
Fielded: 12/21/23 – 01/08/24

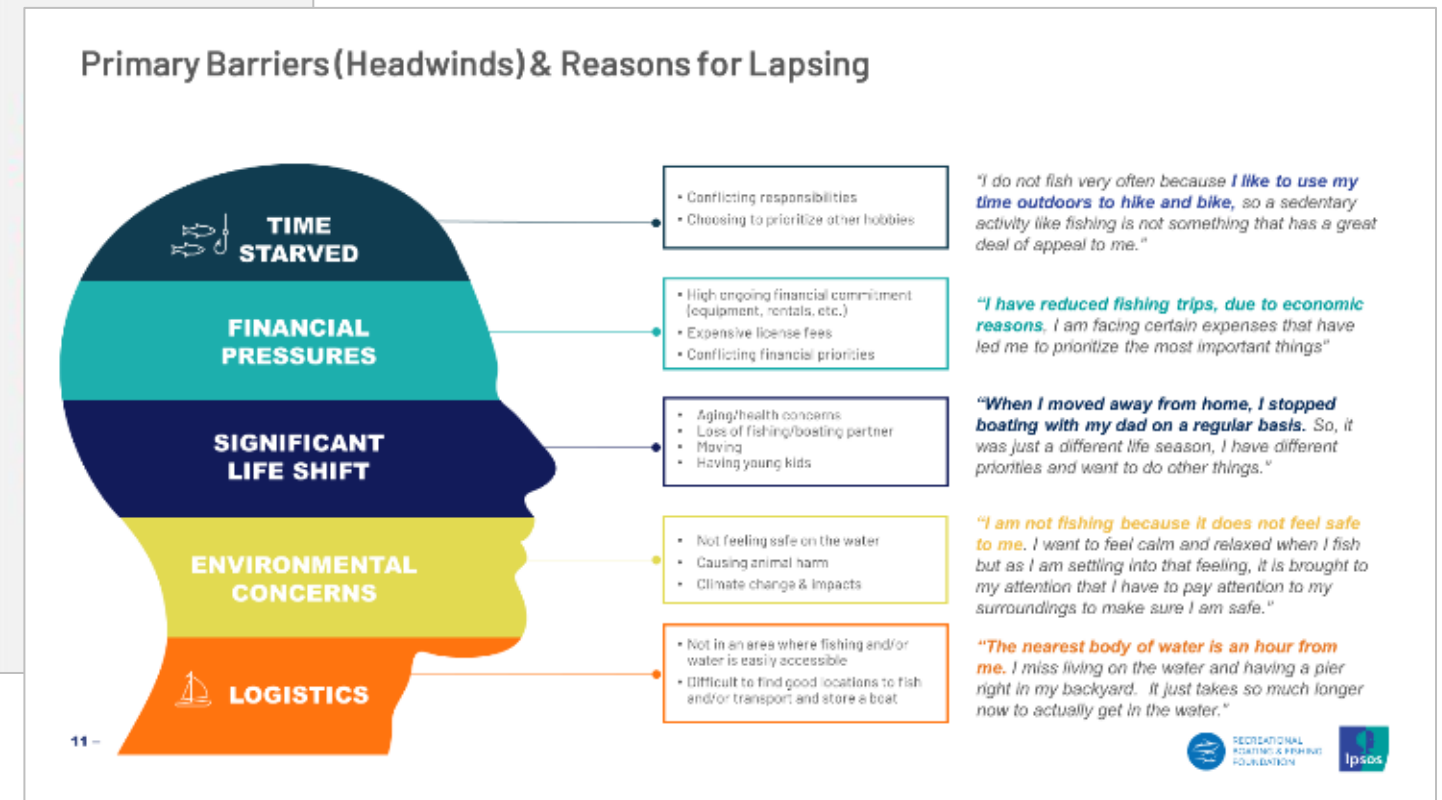
Exploration
Ideation
Optimization

DISCUSSIONS | HOW-TO'S | LIVE CHATS | SURVEYS
VIRTUAL FOCUS GROUPS | QUALITATIVE DEEP DIVE | QUICK POLLS | COMMUNITY & SUPPORT

Fishing & Boating Unlock Core Memories

Nostalgia
Many associate fishing & boating with cherished memories of family and childhood. These memories are often tied to specific people and places.

Happiness on the water
Most describe feelings of joy, peace, serenity, and relaxation when they are out on the water. The outdoor environment also provides a break from the normal stresses of daily life.



WHY CONSUMERS LAPSE IN BOATING AND FISHING

4 themes emerge that differentiate lapsed anglers and boaters from retained/active ones

01.

**Lower
Interest in
Being
Outdoors**

02.

**Lack of a
Shared & Social
Identity**

03.

**Lower
Commitment
to
Participating**

04.

**Underlying
Mindset
Differences**

Lapsed have a lower affinity for the outdoors

These activities compete for their time; a smaller set of activities compared to retained anglers and boaters and lower interest in a variety of outdoor activities suggests different priorities.

Top Free-Time Activities



Watching TV



Reading



Cooking

Top Outdoor Activities



Visiting the Park

Lapsed anglers & boaters struggle to see the activities as *“for someone like me”*

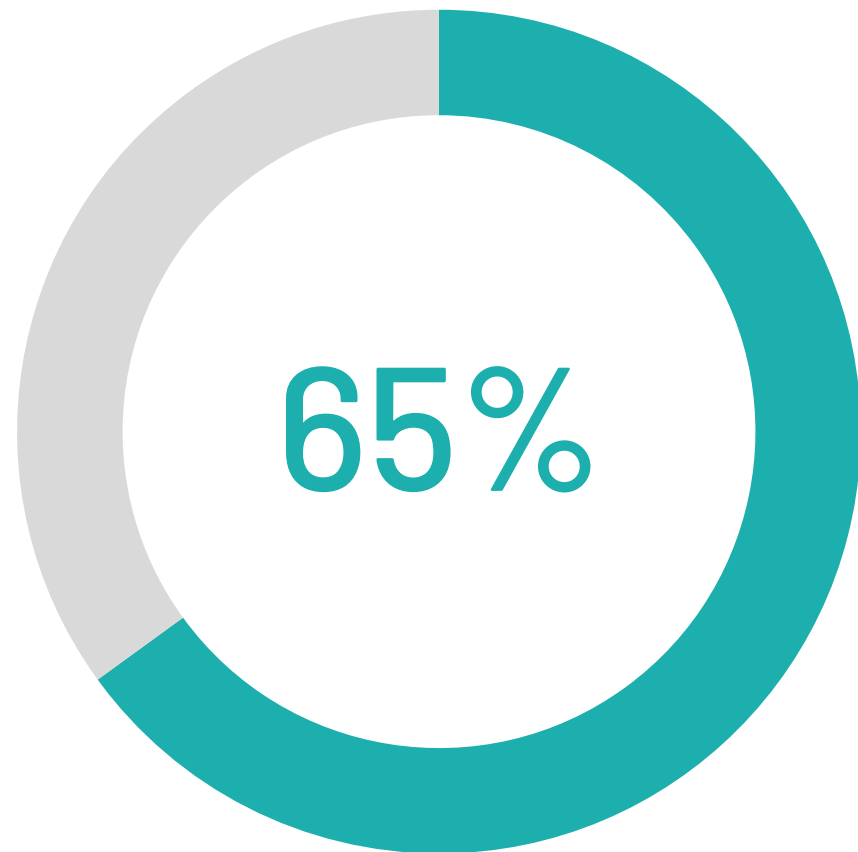
- ME ■ Only 21% of lapsed anglers or boaters have a **strong overlap** in identity with anglers and boaters compared to 50%+ active anglers/ boaters
- ME ■ 1 in 3 lapsed anglers/boaters **do not have anyone else in their household** to go with, suggesting a more disparate social identity.



Lapsed had a harder time committing to the activities

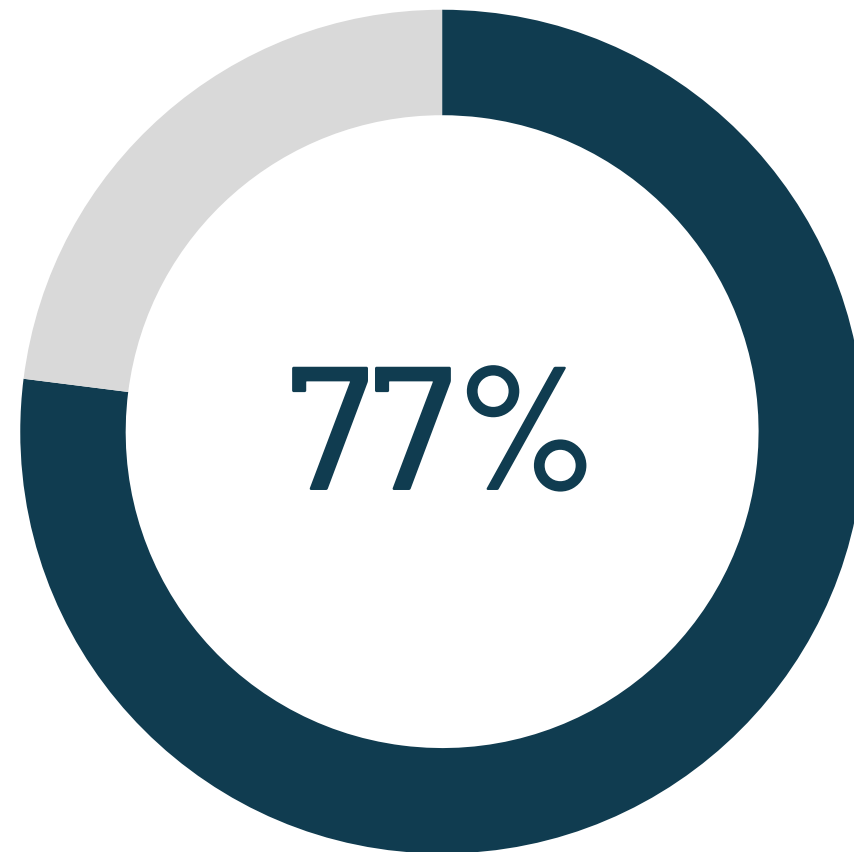
Lapsed anglers/boaters **only ever participated between 1-5 days** compared to 20-22 days

% Agree



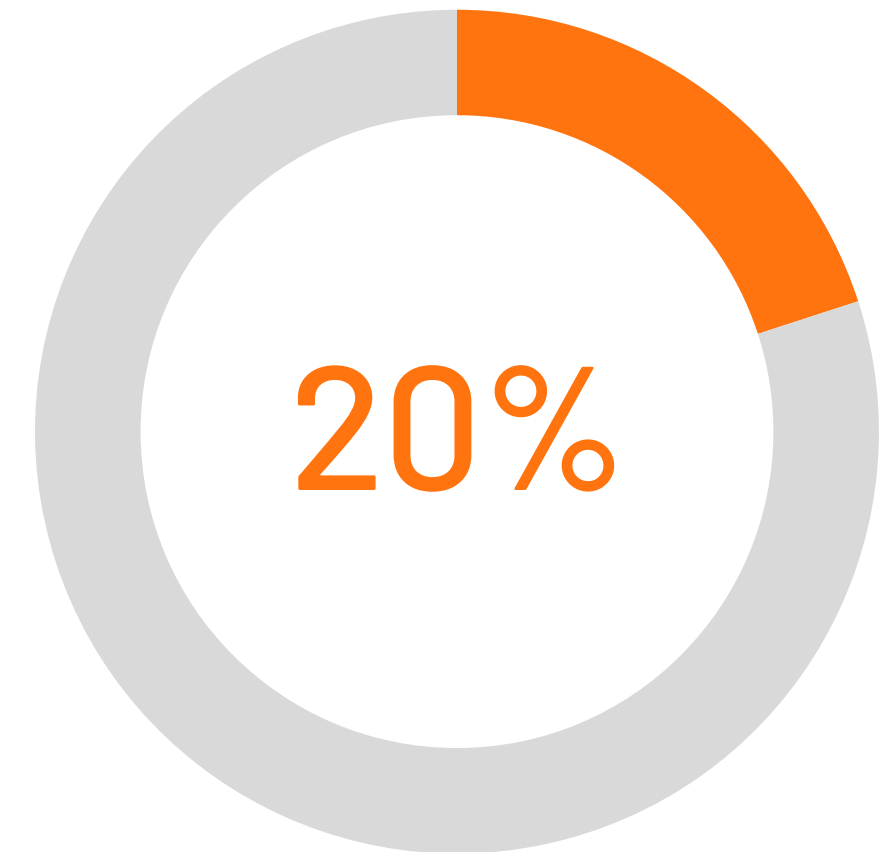
Lapsed anglers/boaters **only ever participated in warm weather** compared to year-round

% Agree



Lapsed boaters who actually **owned their boat** (compared to 50% of active boaters)

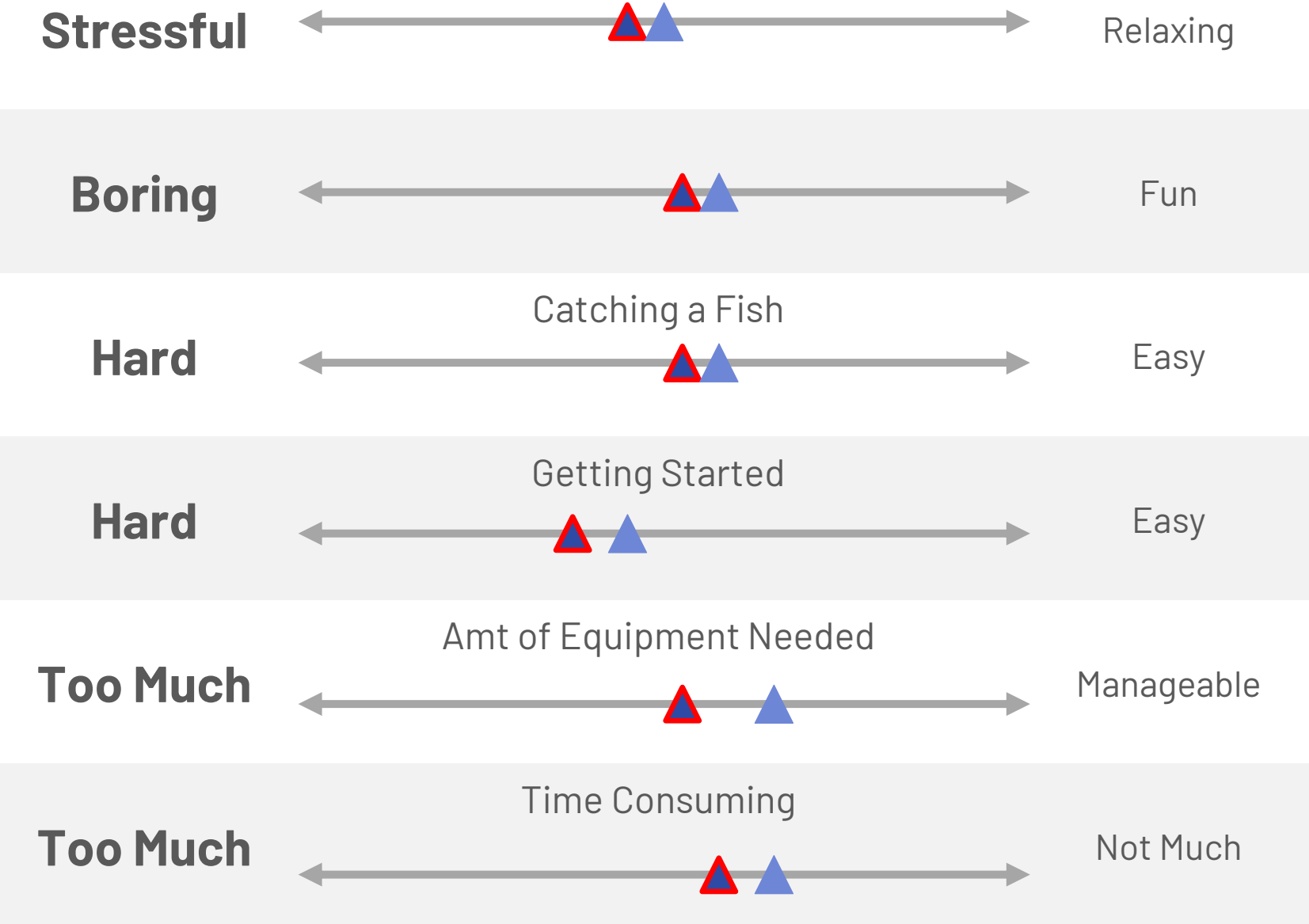
% Agree



Lapsed had less favorable first impressions

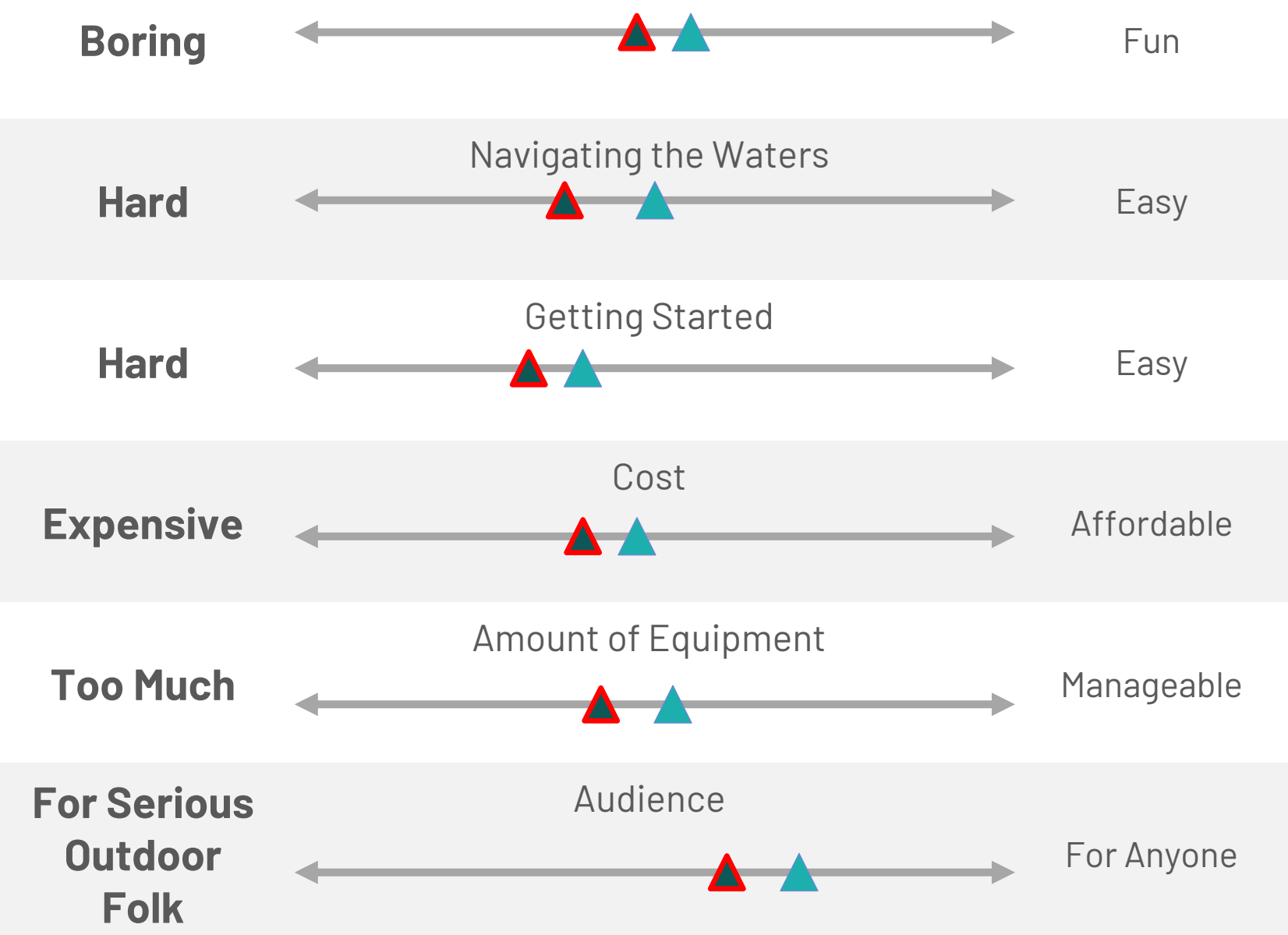
Fishing First Impressions

▲ LAPSED ▲ RETAINED



Boating First Impressions

▲ LAPSED ▲ RETAINED



▲ Indicates statistically different vs Retained

Lapsed demonstrate differences in non-conscious mindsets

PRODUCTIVITY ORIENTATION

1 in 3

Find it **difficult to justify relaxing** over getting things done (compared to 1 in 4 active participants)

PROPENSITY FOR RISK

2 in 5

Prefer to **stick with things that they already know & like** (compared to 1 in 5 active participants)

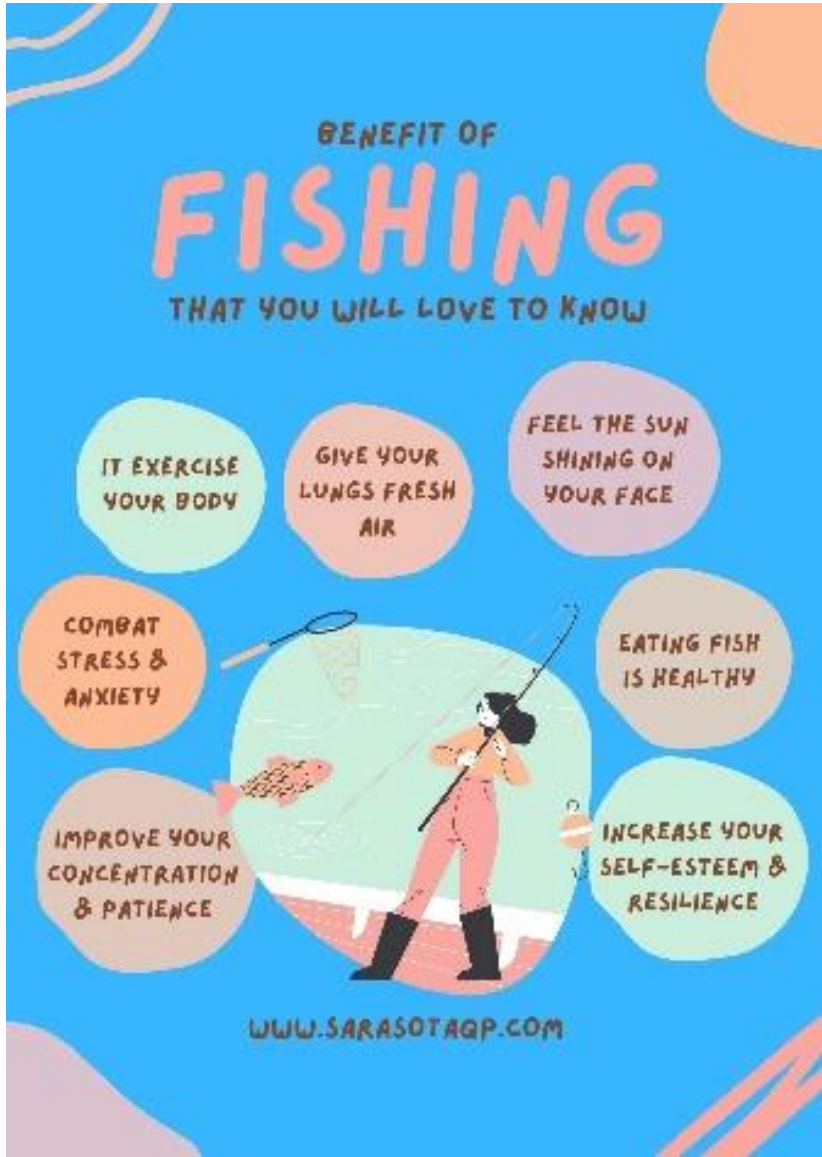
VARIETY SEEKING

3 in 5

Tend to be a **creatures of habit** & like to stick to their routines (compared to 2 in 5 active participants)



Understanding underlying mindsets allows for more intuitive communications and touchpoints



HIGH PRODUCTIVITY ORIENTATION:

Highlighting the productivity of activities will be more critical for retaining motivation to engage in the activity. Tie to other “goals” they have:

- Mental and physical health
- Family bonding
- Getting outside



LOWER PROPENSITY FOR RISK & LOWER VARIETY SEEKING:

Reduce the perceived risk of trying angling/boating by **tying to “familiar”** activities they already partake in (Piggybacking) and facilitating meeting others for **‘familiar faces.’**

- They also have a higher tendency to stick to a routine—another reason to build into their familiar routines & activities versus positioning angling/boating as novel & new.

Free Fishing in State Parks

🌲 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



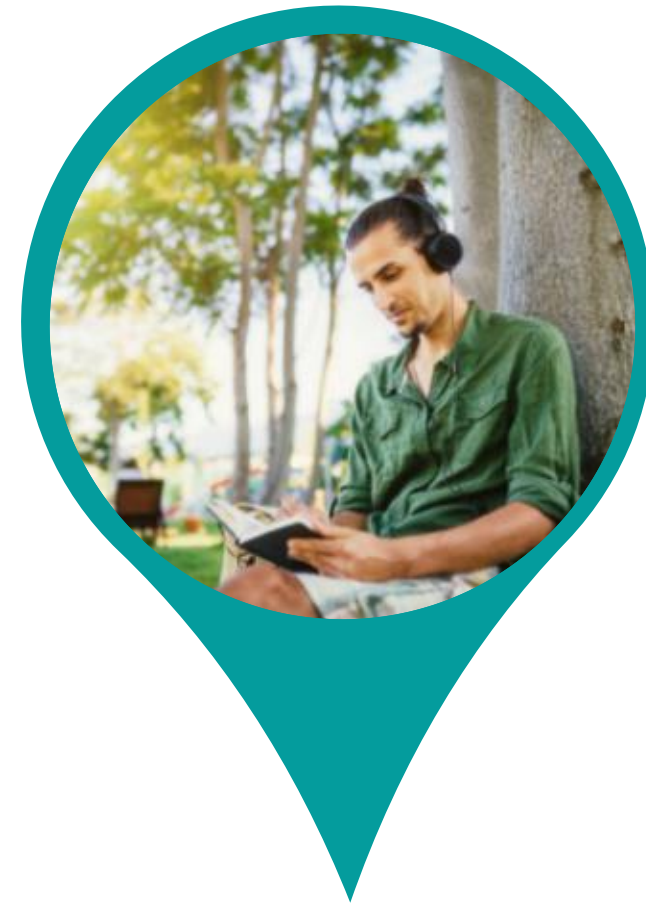
Leading barriers, experienced by everyone are tied to being 'indoorsy,' need for productivity and shared identity

	Total	Angler Rank	Boater
Other family obligations took over my time	1	1	2
I did other things with my family	2	2	1
I did other things for myself with my time	3	3	3
Other hobbies of mine took priority	4	6	6
Activities of dependents/significant other took priority	5	4	7
I prioritized more indoor activities	8	8	10
Household/work responsibilities took priority	6	5	8
I wanted to use my time more productively	7	7	13
I don't have who I used to go with	9	9	5
I don't have anyone to go with	10	10	12
I didn't have access to the equipment I need	12	16	4
Equipment was too expensive	16	22	9



HOW TO IDENTIFY THEM

There are 5 unique personas of lapsed anglers and boaters – easily identifiable based on their main pain point



I need more adrenaline; something more exciting

20%

I need affordable access; it's too expensive to own/maintain a boat

20%

I need geographical support; I don't know where to go near me and need guidance to get back into it

20%

I need an enthusiastic buddy- someone to take me under their wing

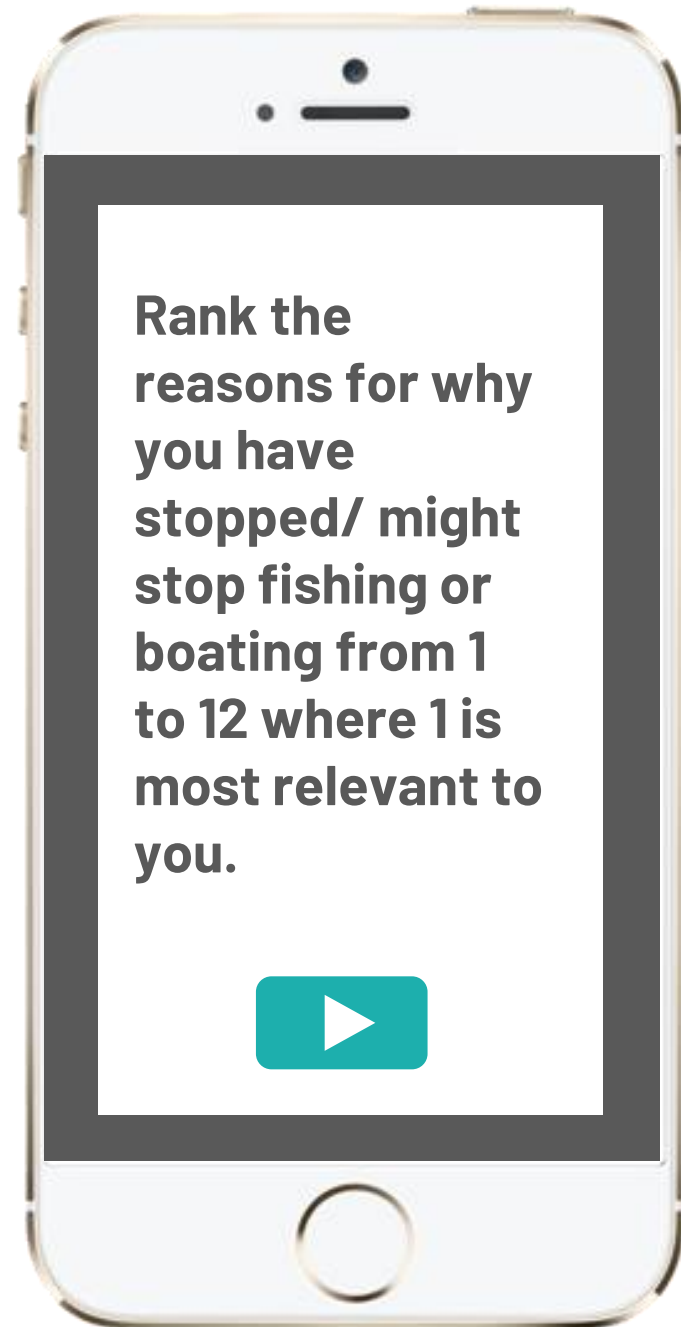
18%

I need more interest; there are a multitude of reasons I don't go

23%

How to Identify Personas

It can be easy to identify through a one-question ranking of reasons they stop fishing or boating



1. I felt intimidated by the sport
2. Equipment was too expensive
3. My health wasn't allowing me to continue
4. I couldn't find resources to get me started
5. It didn't feel rewarding
6. I worried about causing animal harm
7. I wanted to do something more exciting/thrilling
8. Activities of dependents/significant other took priority
9. I prioritized more physical activities
10. I don't have who I used to go with
11. I had/have to travel too far
12. I did other things for myself with my time

This one-question survey can be emailed to any contacts to identify personas using RBFF's algorithm tool, available upon request.

TACTICS TO BRING THEM BACK

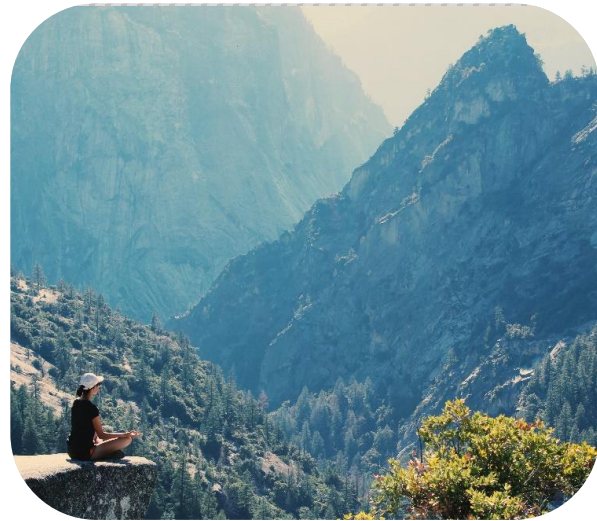
Components of Reactivation

A social and psychological sense of community is shown to drive consumer engagement and loyalty:

Shared experiences = Social community

Shared identity = Psychological community

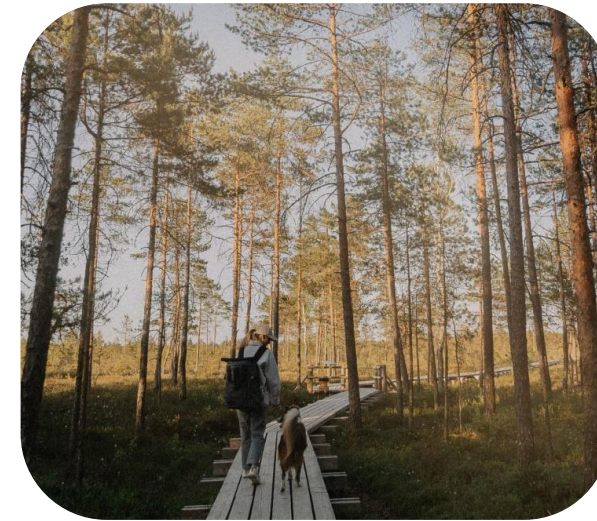
Embed fishing and boating through relevant connections



Goal Oriented

Reinforce how the benefits of fishing and boating **ladder up to higher-order goals** like spending more time outside, achieving a side hustle, etc.

Also, adopting & sticking with hobbies has dually been shown to reduce anxiety & depressive symptoms & enhance life satisfaction.



Piggybacking

Piggybacking is attaching one activity to another that is already established.

We can help to embed new habits and create stronger ones by utilizing “piggybacking” on current **activities** or on **locations** people are already visiting.



Nostalgic Appeals

Reference nostalgia as both **retro/past-looking and forward-looking** to engage & reengage.

Importantly, during times of uncertainty, consumers are more likely to seek nostalgia.



Fresh Starts

The fresh-start effect refers to people viewing **new beginnings as a place to consciously disrupt themselves**. We can use fresh starts year-round to re-engage in the sports.

Universal Retention Strategies



SOCIALIZATION (COMMUNITY BUILDING)

- Create **shared experiences**
- Organize or **build awareness** of social fishing/boating events
- **Amplify or create groups** that tie people together with similar interests and identities



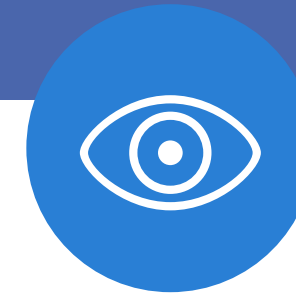
ROUTINE & GOAL ALIGNMENT

Piggybacking

- Other **outdoor activities** (hiking, biking, etc.)
- Other **outdoor spaces** (parks, beach, etc.)
- Other **activities**: a dinner club on a boat

Speak to higher-order goals*

- Health & wellbeing, social benefits
- Spending time w/ loved ones



IDENTITY EXPANSION

Present broader and **more inclusive imagery** of what it means to be an angler/boater:

- A casual outdoor **hiker**
- The successful/**busy businesswoman**
- A **caring parent** at the local small pond with kids, etc.



“SECOND FIRST CHANCE” INITIATIVES

Lapsed-specific events or programs

- Offering them a **fresh, new experience**
- Take advantage of the seasonality of **spring and summer** (or other fresh starts in their life) to re-engage Lapsed groups

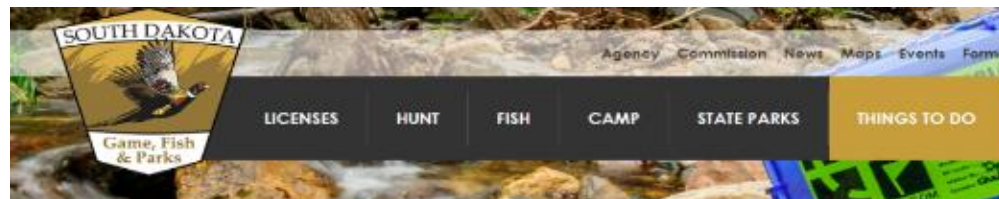


Focused Retention Strategies by Persona



I need more adrenaline/ excitement

Reinforce the ADVENTURE OF THE JOURNEY
Take inspiration from **Geocaching**—pop-ups or hidden treasures are discovered along the way



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.

PIGGYBACK on other activities

- Add to physical activities in particular: hiking, biking, water sports
- Provide tools to help them discover & explore a new area



I need affordable boat access

SHARED Boating Opportunities as the best of all worlds

- Affordable access to a new boating/fishing routine – **use favorable REFERENCE POINTS**
- The thrill with zero maintenance/set-up
- Less control & choice but also less responsibility financially, physically, and mentally



I don't know where to go near me

Make it easy to find local spots and connect with local anglers.

- Highlight exactly what to expect to induce feelings of control & reduce uncertainty (stress-free options)—help them leverage local spots they already know of (familiar park, beach, lake)



Fishing Apps

Offer/enhance local spot tools by providing details around:

- Where to park
- Incline/slope/ease of trail
- Availability of experts/ gear close by / fishing partners
- Safety ratings or even popular times to go so they won't be alone

5 Key Takeaways

Key Takeaways



Prioritize and invest in developing loyal, long-term customers.



Adopt newcomers into the boating and fishing family and hold their hands through the process of becoming hooked.



Try something new. Traditional marketing & outreach efforts alone aren't working.

Key Takeaways



Break the mold with your own “fresh start” through more expansive, socially and behaviorally connected messaging.



Own the churn problem and do your part to plug at least one hole in the “leaky bucket.”



TAKEMEFISHING™.org

Social Media Examples

Follow Take Me Fishing™ for social media retention examples:



@take_me_fishing



@takemefishing_



@takemefishing



@take_me_fishing

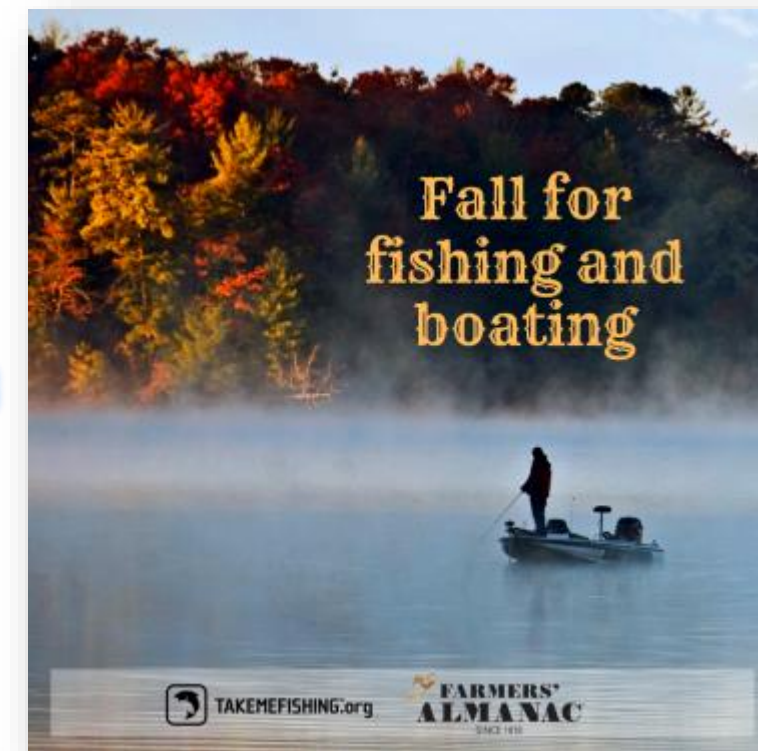


Pinterest @takemefishing



YouTube @takemefishing

Fresh Starts



Piggybacking



Goal Orientation

Nostalgia



Partner with RBFF

Case Studies

- ⚓ Have you implemented a successful strategy focused on retention/reactivation?
- ⚓ Can you share it with us as a case study to share with others?

Pilots

- ⚓ Work with us to pilot some of these churn strategies.

Training/Certification Programs

- ⚓ Do you have education, training or certification programs and have interest in partnering with us to develop modules on effective ways to address churn?

**CITY PARK CONSERVANCY'S
BIG BASS
FISHING RODEO**

THE OLDEST FRESHWATER FISHING RODEO IN THE COUNTRY

Saturday, March 29, 2025

New Orleans City Park

Big Bass Fishing Rodeo
Catch-and-release bank-fishing tournament.

Entry Fee
12 Years + Under \$10
13 Years + Over \$20

Boats on the Bayou
Bayou St. John fishing competition for kayakers and other non-motorized vessels.

Entry Fee
Online Registration \$35
Day of Registration \$45

Battle for the Bass
Student fishing competition grades 7-12.

Entry Fee
12 Years + Under \$10
13 Years + Over \$20

Free Fishtival
DJ, entertainment, food, wildlife exhibits, crafts, games, and activities.

Event Fee
Free and open to the public

neworleanscitypark.org | 504-482-4888

Q & A

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Visit TakeMeFishing.org/Churn or scan the QR code for more resources, including the full research report.



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