



Understanding the Directional Relationship Between Recreational Boating and Fishing Participation: A National Survey

Quick Facts

Introduction to the Project

A marketing research project to better understand the directional relationship between recreational boating and fishing participation was conducted by RBFF in 2006. The marketing research objectives were to develop a better understanding of those who both boat and fish and to assess the market opportunity for anglers adopting fishing from a boat and boaters adopting fishing from a boat.

The project included two phases of marketing research. The first phase involved eight focus groups conducted in four U.S cities with men and women who participate in recreational boating and fishing. The second phase involved a national survey (n = 1,001) for which the respondents were classified into one of three categories:

Boater + Angler: An individual who has fished at least one time in the past 12 months and boated at least one time in the past 12 months for either recreational purposes or to fish (n = 482).

Angler Only: An individual who has fished at least one time in the past 12 months and has not boated in the past 12 months for either recreational purposes or to fish (n = 296).

Boater Only: An individual who has boated at least one time in the past 12 months for recreational purposes, but not to fish, and has not fished in the past 12 months (n = 223).

Key Findings

Promoting Boating *and* Fishing is Good for the Market!

Those who both boat and fish do so significantly more frequently than those who only fish or only boat.

- Boaters + Anglers fished an average of 41.7 times in the past 24 months compared to Anglers Only who fished an average of 21.6 times in the past 24 months.
- Boaters + Anglers boated an average of 27.5 times in the past 24 months compared to Boaters Only who boated an average of 11.9 times in the past 24 months.
 - Moreover, Boaters + Anglers who own a boat fish and boat significantly more frequently than Boaters + Anglers who do not own a boat.

Boaters + Anglers enjoy boating for both recreation and fishing.

- Although by definition Boaters + Anglers participate in both activities, a majority (84.6%) of this market segment has gone boating for the purpose of fishing at least once in the past 12 months and a majority (84.4%) has also gone boating for recreational purposes at least once in the past 12 months.

- Boaters + Anglers who own a boat are significantly more likely to have gone boating for the purpose of fishing at least once in the past 12 months compared to Boaters + Anglers who do not own a boat.

Those who both boat and fish spend more money on fishing equipment and boating accessories compared to those who only fish or only boat.

- Boaters + Anglers are significantly more likely to spend \$500 or more annually on fishing equipment and boating accessories when compared to Anglers Only and Boaters Only, respectively.

Those who both boat and fish are significantly more likely to own a boat compared to those who only fish or only boat.

- 54.3% of Boaters + Anglers own a boat compared to 27.0% of Anglers Only and 25.8% of Boaters Only.
- Boaters + Anglers who do not currently own a boat are significantly more likely to have owned a boat in the past compared to Anglers Only or Boaters Only who do not currently own a boat.

Those who both boat and fish have a greater potential for boat sales compared to those who only fish or only boat.

- Boaters + Anglers who do not currently own a boat are significantly more likely to be actively shopping / researching boats and plan to purchase one in the next 12 months compared to Anglers Only or Boaters Only who do not currently own a boat.

Those who both boat and fish are more likely to report that how they look at the environment was influenced by their fishing and boating experiences compared to those who only fish or only boat.

- Boaters + Anglers are significantly more likely to report that their fishing and boating experiences were important in influencing how they look at the environment compared to Anglers Only or Boaters Only.
- In addition, those Boaters + Anglers who own a boat are significantly more likely to report that their fishing and boating experiences were important in influencing how they look at the environment compared to those who do not own a boat.

Fishing is a Pathway to Boating

The directional relationship is stronger for fishing being a pathway to boating than for boating being a pathway to fishing.

- 44.9% of Boaters + Anglers report that fishing "extremely" or "very much" influenced their decision to get involved in boating. In contrast, 30.4% of Boaters + Anglers report that boating "extremely" or "very much" influenced their decision to get involved in fishing.
- The primary reason Boaters + Anglers purchased their first boat was to fish (67.7%) followed by to cruise / sightsee (25.6%) and to participate in water sports (22.3%).
- 51.3% of Boaters + Anglers reported first participating in fishing and 14.9% reported first participating in boating.

- In the focus groups, those who reported first participating in fishing described boating as a means for improving their fishing experience or another way to enjoy being on the water. Those who reported first participating in boating described fishing as one of many activities done on the boat.
- Boaters + Anglers report spending more time fishing than boating. 45.1% of Boaters + Anglers report that they spend more time fishing whereas 27.6% of Boaters + Anglers report that they spend more time boating.
- As such, Boaters + Anglers fish more frequently than boat. In the past 24 months, Boaters + Anglers fished an average of 41.7 times compared to boated an average of 27.5 times.
- For Boaters + Anglers fishing is the most popular activity to do while boating. 74.9% of Boaters + Anglers report that they fish while on their boat followed by cruise / sightsee (61.1%), participate in water sports (45.9%), and participate in paddle sports (24.2%).
- 87.5% of Boaters + Anglers who own a boat report that they would still fish if they didn't own a boat and 72.2% report that they would still boat if they didn't fish.
- More Boaters + Anglers identify with being an angler than with being a boater. 49.6% of Boaters + Anglers identify with being an angler compared to 22.6% who identify with being a boater.
 - In the focus groups, those who identified with being an angler indicated that they did so because they viewed boats as a platform for fishing and those who identified with being a boater indicated that they did so because they viewed fishing as one of many activities to do on a boat.
- When Boaters + Anglers were given the choice of participating in fishing or boating but not both activities, 63.5% selected fishing and 36.5% selected boating.
 - When discussed in the focus groups, the decision to select fishing was explained by the participants as they found great pleasure in fishing and would choose to do it without a boat rather than not do it at all. The decision to select boating was explained by the participants as they would give up fishing because they also enjoy the many other activities associated with boating – that is, they enjoy boating for a number of reasons of which fishing is one.

Marketing Opportunity

Anglers Only have a greater interest and likelihood to fish from a boat compared to Boaters Only.

- Anglers Only are significantly more likely to be interested in fishing from a boat compared to Boaters Only. 41.8% of Anglers Only said that they were “very” or “extremely” interested in fishing from a boat compared to 12.5% of Boaters Only.
 - Anglers Only who own a boat are significantly more likely to be interested in fishing from a boat compared to Anglers Only who do not own a boat.
- Anglers Only have a greater likelihood to fish from a boat compared to Boaters Only.
 - Of those Anglers Only and Boaters Only who were interested in fishing from a boat, Anglers Only are significantly more likely to go fishing from a boat in the next 12 months compared to Boaters Only. 44% of Anglers Only reported that they were “very” or “extremely” likely to go fishing from a boat in the next 12 months compared to 21.5% of Boaters Only.

- In the focus groups, many participants talked about using a boat to improve their fishing experience and, therefore, marketing messages for Anglers Only may focus on boating improves fishing. Conversely, many participants talked about fishing as being another activity to do on their boats and yet another reason to take the boat out on the water and, therefore, marketing messages for Boaters Only may focus on fishing is another reason to take the boat out on the water.
- Anglers Only who are not interested in fishing from a boat report their lack of interest as being attributable to being afraid of the water (18.5%), having other hobbies or interests that they enjoy more than fishing from a boat (13.4%), and thinking fishing from a boat is boring (10.9%).
- Boaters Only who are not interested in fishing from a boat report their lack of interest as being attributable to thinking fishing from a boat is boring (37.0%), not having enough time to fish from a boat (16.1%), and having other hobbies or interests that they enjoy more than fishing from a boat (11.6%).

Other Findings

Early Fishing Experiences

Boaters + Anglers, Anglers Only, and Boaters Only are similar in their early fishing experiences.

- Boaters + Anglers and Anglers Only were introduced to fishing at an average age of 8.4 and 9.2, respectively, and both were introduced to fishing primarily through family members. A majority (84.9%) of Boaters Only went fishing as a child and became introduced to fishing at an average age of 7.1 years and, similar to the other market segments, was introduced to fishing primarily through family.
- More than half (60.0%) of Boaters + Anglers and Anglers Only first went fishing from the shore or bank followed by fishing from a pier or dock (21.2%) and fishing from a boat (15.2%).
 - Boaters + Anglers are significantly more likely to have first gone fishing from either a pier or dock or a boat compared to Anglers Only whereas Anglers Only are significantly more likely to have first gone fishing from the shore or bank compared to Boaters + Anglers.

Early Boating Experiences

Early boating experiences differ from early fishing experiences in that the average age is higher and friends play a stronger role in the introductory experience. Boaters Only are significantly older when first introduced to boating compared to Anglers Only and they are significantly more likely, compared to the other market segments, to have been introduced to boating through friends.

- Boaters + Anglers and Boaters Only who were introduced to boating at an average age of 13.7 years and were introduced to boating primarily through family; however, friends played a stronger role in the introductory boating experiences when compared to the early fishing experience. More than half (59.1%) of Anglers Only went boating as a child and became introduced to boating at an average age of 8.7 years and, similar to the other market segments, family played an important role and friends played more of a role than when compared to fishing.
- Almost half (44.6%) Boaters + Anglers and Boaters Only reported that when they first went boating the primary activity was to fish (44.6%) followed by to cruise / sightsee (26.6%) and to do water sports (21.8%).

- Boaters Only were significantly more likely to report that when they first went boating the primary activity was to do water sports or to cruise / sightsee compared to Boaters + Anglers whereas Boaters + Anglers were significantly more likely to report that when they first went boating the primary activity was to fish compared to Boaters Only.

Current Boating and Fishing Activities

Family is an important part of boating and fishing.

- Almost two thirds (63.8%) of Boaters + Anglers and Boaters Only boat with their families the most followed by friends (30.5%). Similarly, 63.0% of Boaters + Anglers and Anglers Only fish with their families the most followed by friends (25.8%).
- Boaters + Anglers and Boaters Only who are boat owners are significantly more likely to boat with family when compared to non boat owners whereas non boat owners are significantly more likely to boat with friends and co-workers when compared to boat owners.

Boating and fishing experiences are most likely freshwater.

- Fishing experiences are most likely freshwater only (65.4%) followed by both freshwater and saltwater (25.3%) for both Boaters + Anglers and Anglers Only; however, Anglers Only are significantly more likely to describe their fishing experiences as freshwater only compared to Boaters + Anglers.
- In the Anglers Only market segment those who do not own boats are significantly more likely to describe their fishing experiences as saltwater only compared to those who own boats.
- Boating experiences are most likely freshwater only (63.1%) followed by both freshwater and saltwater (25.2%) for both Boaters + Anglers and Anglers Only.

Fishing is one of many activities done on a boat but for Boaters Only it's not a primary activity.

- For Boaters Only cruising / sightseeing (71.1%) is the most popular activity done while boating followed by water skiing / water sports (42.7%), paddle sports (25.6%), and fishing (18.5%).
- Boaters Only are significantly more likely to report cruising / sightseeing as an activity done while boating compared to Boaters + Anglers and Boaters + Anglers are significantly more likely to report fishing as an activity done while boating.

Boaters + Anglers, Anglers Only, and Boaters Only take trips or vacations that involve fishing and boating.

- Boaters + Anglers are significantly more likely to have taken a trip or vacation in the past 24 months that involved fishing compared to Anglers Only. 55.7% of Boaters + Anglers have taken a trip or vacation in the past 24 months that involved fishing compared to 31.8% of Anglers Only. Most (83.6%) reported that fishing was planned to be part of the trip or vacation.
- 60.5% of Boaters + Anglers and 57.8% of Boaters Only have taken a trip or vacation in the past 24 months that involved boating. Most (83.6%) reported that boating was planned to be part of the trip or vacation.

Boat Ownership

- 39.9% of Boaters + Anglers, Anglers Only, and Boaters Only own a boat.
- 45.8% of those who currently own a boat report that they had previously owned a boat. And 36.6% of Boaters + Anglers own a second boat as do 26% of Anglers Only and 34% of Boaters Only.
- Nearly half (48.4%) of those Boaters + Anglers and Boaters Only who do not currently own a boat report having access to a boat through family and 42.4% report having access to a boat through friends. One in ten (9.6%) rent a boat.
- Of those that do not currently own a boat many (75.2%) have never owned a boat. The primary reason for never having owned a boat was cost (33.6%) followed by not wanting to buy a boat (22.2%) and having access to a boat through family or friends (13%).
- Those Boaters + Anglers, Anglers Only and Boaters Only who have ever owned a boat were an average of 26.8 years old when they purchased their first boat and many (72.6%) purchased their first boat used.
 - 60.4% reported that their first boat was an outboard followed by human powered boat (17.7%), inboard (6.9%), sailboat (4.8%), and inboard / outboard (4.5%).
 - Boaters Only and Anglers Only are very different in the reasons they purchased their first boats. Boaters Only are significantly more likely to have purchased their first boat to cruise / sightsee, participate in water sports / water ski, and participate in paddle sports compared to Anglers Only. Anglers Only are significantly more likely to have purchased their first boat to fish compared to Boaters Only.

Fishing License

- Just about two thirds (62.7%) of Boaters + Anglers and Anglers Only currently own a fishing license.
 - In the Boaters + Anglers and Anglers Only market segments those who own a boat are significantly more likely to currently own a fishing license compared to those who do not own a boat.
- Of those Boaters + Anglers and Anglers Only who currently own a fishing license, most (96.6%) plan to renew their fishing licenses. Interestingly, Anglers Only who do not own a boat are significantly more likely to report that they plan to renew the license when compared to those who do own a boat.
- And of those Boaters + Anglers and Anglers Only who do not currently own a fishing license more than half (56.2%) plan to purchase one next year.
- Those who are not planning to purchase or renew their fishing license have a variety of reasons including fishing on private property and therefore do not need a fishing license (23.3%), the perception that it's not needed or just isn't important enough (18.5%) they're not fishing frequently enough to justify having to purchase a fishing license (17.7%), and other members of their family are fishing (8.5%).
 - In the focus groups, very few participants understood that the dollars generated when a fishing license is purchased contribute to a state's conservation efforts. In fact, some participants complained that the state requires the purchase of a fishing license.

- Most Boaters + Anglers and Anglers Only purchase a fishing license on an annual basis.
 - However, Boaters + Anglers who own a boat are significantly more likely to purchase a fishing license on an annual basis compared to those who do not own a boat. And those Boaters + Anglers who do not own a boat are significantly more likely to purchase a license for shorter periods of time or only when a trip or vacation is planned compared to those who own a boat.

Environment

- More than half (59.7%) of Boaters + Anglers, Anglers Only, and Boaters Only report that their fishing and boating experiences were important in influencing how they look at the environment.
- Nearly two thirds (62.5%) of Boaters + Anglers, Anglers Only, and Boaters Only are willing to volunteer their time to help the environment.
 - Boaters + Anglers are significantly more likely to be willing to volunteer their time to help the environment compared to Anglers Only.
- 63.1% of Boaters + Anglers, Anglers Only, and Boaters Only are willing to pay more for the fishing and boating products they buy or the services they use when boating or fishing if it improves the environment.
- Few (12.2%) Boaters + Anglers, Anglers Only, and Boaters Only belong to a conservation or environmental organization.
 - Boaters + Anglers are significantly more likely to belong to a conservation or environmental organization compared to Anglers Only and Boaters Only.

For more interesting findings refer to the report [Market Research to Better Understand the Directional Relationship Between Recreational Boating and Fishing Participation and other related information resources at RBFF.org.](#)