



RECREATIONAL
BOATING & FISHING
FOUNDATION

Participation in Boating and Fishing

A Literature Review

EXECUTIVE SUMMARY



September 2000

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RECREATIONAL BOATING & FISHING FOUNDATION

About the Recreational Boating and Fishing Foundation

The Recreational Boating and Fishing Foundation (RBFF) is a 501(c)3 non-profit organization whose mission is to implement an informed, consensus-based national outreach strategy that will increase participation in recreational angling and boating and thereby increase public awareness and appreciation of the need for protecting, conserving and restoring this nation's aquatic natural resources.

The mission and tasks of RBFF are outlined in the Strategic Plan for the National Outreach and Communications Program as required by the Sportfishing and Boating Safety Act, passed by Congress in 1998. The Strategic Plan is the result of an exhaustive national consensus-building effort among user groups and stakeholders to identify problems, set objectives, and devise strategies to meet those objectives. The five objectives that resulted from this effort include:

Objective #1: Create a top-of-mind recreational boating and fishing campaign to develop awareness, trial and continued participation.

Objective #2: Educate people as to how and where to boat and fish.

Objective #3: Prioritize target market segments and create messages that address each segment's specific needs.

Objective #4: Educate stakeholders on marketing, outreach, and implementation of national strategies to targeted user groups.

Objective #5: Make availability of and access to boating and fishing locations easy and simple.

RBFF has solicited stakeholders to volunteer on task force groups, specific to each objective, and charged with developing definitive plans for meeting these five objectives.

This literature review project addresses Objective #3 to "Prioritize target market segments and create messages that address each segment's needs," by examining characteristics of anglers and boaters, identifying groups which would be most susceptible to boating and angling participation, and identify types of messages that would increase their interest in boating and fishing participation. This project supports preparation for the National Boating and Fishing Campaign and helps meet the information needs of program partners and stakeholders.

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Statement of the Problem

The Recreational Boating and Fishing Foundation (RBFF) is implementing the Strategic Plan for the National Outreach and Communications Program required by the 1998 Sportfishing and Boating Safety Act. This Strategic Plan was a response to static or declining participation in recreational fishing and boating, and recognition of the need to increase public awareness about natural resource conservation. In order to develop the programs and materials needed to successfully accomplish the Plan's objectives, it is necessary to identify, describe and prioritize target market segments. The understanding gained from this analysis will help the RBFF and its partners design appropriate messages and programs for priority market segments.

Purpose

The purpose of this project was to assist the RBFF by reviewing the existing literature available on participation by individual market segments in recreational angling and boating. The RBFF has identified five criteria which priority market segments need to meet:

- Low current rates of participation.
- High projected population growth.
- High propensity to adopt behavior.
- High likelihood a marketing campaign is apt to alter participation.
- Potential for co-marketing with other outdoor-related marketing campaigns.

With these criteria providing the background, the literature was reviewed to provide current information on the status of recreational fishing and boating participation, an understanding of the factors that affect participation, and make recommendations that:

- Propose specific priority market segments for the marketing campaign.
- Suggest messages that would resonate with priority market segments.
- Detail the reasons why some segments should not be given immediate priority.
- Provide research priorities to better evaluate promising market segments currently having insufficient information.

Current Situation

Population growth in the United States is slowing. The estimated 2000 population of 275 million is comprised of 82% white, 13% black, and 5% other races (predominantly Asians). Between 2000 and 2020, the U.S. Census Bureau projects the nation's population to grow by 50 million people or by nine percent each decade. About 37% of the growth over the next 20 years will be comprised of minority populations, principally African American and Asians. Hispanics, who can be of any number of races, will comprise about 47% of U.S. population growth over the next twenty years. This growth will not be evenly distributed across the U.S. Further, minority and ethnic population growth will be most prevalent in southern and western states. With these projections in mind, it is clear that consideration of the long-term trends in U.S. population growth should be considered in any plan to market boating and fishing to the general population. However, we must be mindful that over the next several decades, the Anglo population will continue to be a large majority numerically and account for the majority of growth.

Within the U.S. resident population, there are an estimated 35 million active anglers 16 years and older and another 15 million youth anglers. The U.S. Fish and Wildlife Service's National Survey estimates of anglers for 1991 and 1996 were virtually unchanged. Recent national telephone surveys by Responsive Management also estimated the angling population at about 50 million. Fishing license sales, which have been on a slight downward trend for the past decade, have shown some improvements in recent years. Nationally, the total number of licenses sold in 1999 was up slightly to 29.5 million. License sales in 30 of the 50 states increased from 1998 to 1999.

Most of the nation's population has tried fishing at least once in their lives. Only 12% have never fished. About 18% tried fishing as children but have not carried the activity over into adulthood. One-quarter of the population has fished as adults but not within the past two years. Finally, nearly half of all adults (45%) have fished at least once in the past two years. Clearly, the U.S. population is familiar with recreational fishing, although there is substantial dropout and re-entry on an annual basis. Recent surveys by Responsive Management shows that the vast majority of Americans think that recreational fishing is a good thing.

Boating participation estimates have not been made as consistently as those for fishing. National boating surveys have estimated the number of adult boaters to range from 22 to 24 million. Nationally, between 37 and 46 million people take a boating trip each year. Overall, about 45% of the U.S. population has been boating at least once during their lifetimes. Unlike fishing licenses, boat registrations across the country have grown by nearly 14% from 1990 to 1998. Registration growth occurred in 44 of 50 states during this period.

Three population characteristics important to angling and boating participation are age, gender and race/ethnicity. There are two major age points in the life cycle where dramatic declines in fishing and boating occur. The first occurs between the ages of 15 and 16. At age 15, about 40% of all boys had fished while 60% had boated. Similarly,

28% of all girls were actively fishing and 38% actively boating. By the following year, one-third of the boys and two-thirds of the girls had dropped out of fishing with similar amounts dropping out of boating. This is the highest participation rate decline for any age. Reasons for these dramatic declines have not been studied. However, the literature suggests that the process of socializing girls into women plays an important role. This process begins at an early age and streams girls into activities viewed by parents, teachers, and community members as conducive to femininity. There is evidence that the socialization process can be overcome in later life through marriage to an angler or boater, or through socialization with other anglers and boaters. Likewise, reasons for the sharp decline in fishing and boating participation among boys are also unknown.

The second major point of angling and boating decline is around age 45. Participation rates generally are consistent or increase slightly from age 16 upward and peaks at the 35-44 age group. Currently, about 22% of this age group are active anglers and 24% are active boaters. The proportion declines to about 20% for the 45-54 age group, 15% for the 55-64 age group, and 9% for those 65 and older. Reasons for the decline again are not well understood. Research on constraints to fishing and boating participation has not examined age-specific constraints. That is, nearly all the research on angler constraints has been based on entirely adult groups with some contrasts between males and females. Individual age and age group analyses are absent.

Minority and Ethnic Participation

Boating and fishing participation by Blacks, Asians, and Hispanics is very low. Minorities (Blacks, Asians, and Others) comprise about 10% of all anglers and 16% of the population. Hispanics encompass only 5% of the angling population and 10% of the population. Among boaters, 77% are White, 8% Black, and 15% Asian and other races. Hispanics comprise about 7% of the boating population. Most minority and ethnic groups live in urban areas and reside in cultural enclaves. These two factors tend to reinforce traditional outdoor recreation and leisure activities these groups are familiar with, such as picnicking and outdoor sports, because they inhibit acculturation and exposure to unfamiliar and often inaccessible activities. Knowledge and skills about recreational fishing and boating are often absent for these groups with few mechanisms available for acquiring them.

Constraints and Motivation

Women often face different constraints than men in their general recreation and angling activity. These differences are partially based on life situations. Women traditionally have been caregivers for children and responsible for most domestic chores. As a result, their leisure time is in shorter blocks, which are not conducive to many outdoor recreation activities in general, and fishing and boating specifically. Further, women are increasingly involved in working outside the home and engaging in professional careers. This further constrains the time available for recreational activities requiring more than an hour or two in duration.

Recent studies show that women's leisure involvement is motivated by personal growth, social interaction, identity, relaxation, learning, independence, and escape. These motives are not easily achieved because women are often expected to extend their domestic roles when fishing or boating with family or friends. Thus, other activities are sought out which will allow for fulfillment, and which often involve participation with other women. Women-only outdoor programs which involve fishing, hunting, boating, hiking and camping have been very successful. Success has been achieved because skills are taught in a non-threatening (non-male dominant) and supportive manner. This process is underscored by educational research that shows women have different learning styles than men. Women are more task-oriented, qualitative, altruistic, and contemplative than men who are time-oriented, quantitative, self-interested and competitive.

Motivational differences between men and women have been studied very little. However, the few studies available confirmed the above observations. Men rated motives related to catching fish for sport and challenge, and catching trophies higher than women. On the other hand, women rated getting away from the demands of life, being with family and friends, and experiencing solitude higher than men. This underscores the desire by women not to engage in traditional roles, but to escape those roles and engage in an activity in a setting where they can focus on immediate family and close friends.

The motive of engaging in recreational activities with the family is a key element of participation that cuts across Anglos, minorities and ethnic groups. For Hispanics, participation with the family group automatically includes the extended family, which has implications for the types of facilities and experiences needed to support their fishing and boating participation.

The greatest amount of information on recreational fishing involves the motivations of its participants. Dozens of studies have consistently shown that involvement with family members and friends, as mentioned above, is consistently rated among the top five reasons for fishing. Additionally, the motives of escaping the daily routine, relaxation, being outdoors and close to nature, and the sport and challenge of fishing consistently have been rated among the most important reasons for fishing for over 30 years. Further, these motives remain at the top of the list regardless of the population or sub-population being studied. Given that most of the respondents in these studies were men, the stability was not surprising. What was unexpected was that the limited studies of women, minorities and ethnic groups showed these motives also were rated consistently higher than other motives, although the order was not always the same. When anglers were seeking large pelagic species (like billfish) or fishing in tournaments, other activity specific motives became important but did not supplant the top five.

The motivations of boaters parallel those of anglers. The top five angler motives also are the top five among boaters. The importance of speed, cruising, and water skiing as reasons for boating are similar to the activity-specific motives for fishing. The similarities between boater and angler motives are likely to be an artifact of the fact that over 60% of boaters use their boats to fish.

Earlier, constraints to fishing by women were mentioned. The concept of constraints has received considerable research attention over the past decade. Most of this literature has focused on leisure constraints and not specifically in fishing and boating constraints. However, findings from the few fishing and boating constraint studies are in consonance with the larger leisure literature. Women generally face different constraints than men, not only because their social roles are different, but because of inherently being women as mentioned above. However, the universal constraint to both boating and fishing is time. Whether it is family or work obligations, allocating the time for fishing and boating is more difficult than exercising at the club, swimming, bicycling, playing softball, or going to a movie. These and other activities compete for available leisure time and can take over priority because of their ease of access and short duration. Involvement in new activities that take the place of fishing is significantly more prevalent among anglers who have become inactive or stopped fishing for several years, or who may have dropped out within the past two or three years.

Family and work obligations were also more prevalent constraints among inactive and recent dropouts than among active anglers. Further, inactive anglers reported a greater incidence of lack of knowledge and fishing skills than active anglers. Recent dropouts mentioned lack of fishing partners and access to fishing opportunities more frequently than inactive or active anglers. These constraints clearly can be addressed through education and outreach programs.

An important concern that cuts across women and minorities is personal safety. For women, the safety issue is prevalent in most outdoor recreation activities where women are isolated from others and vulnerable to attacks. This can occur in certain fishing and boating situations. The second aspect of safety is physical harm stemming from accidents in remote areas. This concern is generally based on lack of knowledge about the outdoors and confidence in outdoor skills. For minorities, lack of knowledge and skills creates discomfort in outdoor settings. In water-based settings, the fear of drowning among minorities is a significant constraint to participation.

Very few studies have looked at boating constraints. In the few that have, boaters reported “lack of time” as the primary reason for not boating or boating less frequently than in the past. Whereas equipment was less problematic for anglers, boat repairs, storage problems, and operation and maintenance expenses were issues for many boaters. While more information on the types of time constraints boaters face is needed, more in-depth information on differences between men and women, among age groups, among races and ethnic groups, and among active and inactive boaters is very important if programs are to be designed to help them negotiate these constraints successfully.

This holds true for anglers as well. Whereas we know more about the importance of various constraints for anglers, in general, than we do for boaters, we still have little understanding of differences across sub-groups of active and inactive anglers, and non-participants. We have a good idea of the size of these groups, but a relatively poor understanding of the factors that inhibit their participation.

Demographics

Standard socioeconomic characteristics of the population do little to discriminate among active anglers and boaters. We do know that anglers and boaters differ from the general population in several ways: 1) a greater proportion of rural residents fish and boat, but the majority of anglers and boaters live in large urban and suburban areas; 2) anglers and boaters are younger than the general population, 48% of the adult population is 45 years and older while 39% of anglers and 41% of boaters are 45 and older; 3) 48% of the population is male, but 73% of anglers and 57% of boaters are male; 4) 83% of the population is White while 90% of anglers are White and 77% of boaters are White; 5) angler incomes are slightly higher and boater incomes are moderately higher, on average, than the general population; and 6) anglers and boaters have slightly higher education levels. Removing angler and boater numbers from the general population and then comparing them to the non-boating and non-angling populations accentuates the differences above. However, these variables only account for a small amount of the differences between those who engage in the two activities and those who do not. They are virtually useless in analyzing differences among participants of different outdoor recreation activities.

Lifestyle Characteristics

Very little related research was found concerning the lifestyle characteristics of anglers and boaters. While some proprietary work has been conducted, it is not publicly available without substantial cost. The closest information that approximates the activity, interest, and opinion (AIO) research prevalent in the marketing literature is found in the literature on recreational specialization. These studies have focused mostly on activity participants. Some angler and boater studies have begun to arrange participants along a continuum. At one end is the least specialized and at the other the most specialized. The least specialized anglers and boaters are likely to be aware of and seek only the most superficial and apparent activity-specific elements of the experience. For anglers, catching any type of fish is sufficient; for boaters, cruising or water skiing is the major outcome sought. They generally have a simplistic view of the activity. Highly specialized anglers view the activity through greater knowledge and experience. They approach the social worlds of fishing and boating in a more holistic fashion. This type of angler or boater would view non activity-specific elements of their experience (i.e., escape, relaxation, nature) equally, if not more important, than activity-specific outcomes. Further, high specialization anglers and boaters immerse themselves in the activity through involvement with affinity organizations, socializing with similar-minded individuals, greater involvement in seeking information through the media, and greater involvement with the technology of the activity. While, the specialization concept has shown initial utility as a typology for understanding angler and boater participation, considerable work still needs to be conducted to solidify the framework for understanding participant differences and tying it more directly to the marketing literature. This is important if we are to be able to identify discrete market segments with unique characteristics, which can be targeted with effective messages through relevant communication channels, and develop appropriate programs that facilitate involvement.

Priority Market Segments

With the vast majority of the U.S. population supportive of recreational fishing and boating, and with a high percentage having experienced boating and fishing at some point during their lifetime, the opportunities for stimulating greater participation by the American public are quite good. The similarities between boaters and anglers in terms of the types of experiences they are seeking and constraints faced (with the exception of economic constraints by boaters) are quite close. Studies show 60-70% of boaters also fish, so many similarities should be expected. Based on the current population size and growth projections for the next 20 years, high priority market segments should include the following:

- **Males.** The current market should not be overlooked. Maintaining and increasing rates and frequency of participation among this group should be a priority. Adult men are mentors for children and can act as socialization agents for spouses and friends. Focusing on challenge, relaxation, and family are messages that should resonate with male anglers and boaters.
- **Recent dropouts.** This group is highly susceptible to fishing and boating participation and is larger than most minority populations. It contains a greater proportion of women. Focusing on the 45 and over group may payoff well because of the aging of the population and large number of people moving into the age group over the next 20 years. Messages concerning being in the outdoors, relaxation, escape, the challenge of fishing, and family fun should be appealing. Identifying why active participants over 45 years of age discontinue fishing and boating at a higher rate than younger anglers and boaters should be a priority.
- **Women.** This group comprises over half the U.S. population, but only 10% of females participate in fishing and 16% in boating. Growing interest in both activities by women has been stimulated by needs for independence, involvement with the outdoors, and escaping traditional social roles, which could be the basis for connecting with one segment of women. A second group of women seek involvement with the family away from traditional settings and domestic roles. Messages that accent these benefits should be appealing. One note of caution is warranted. Women place a lower priority on boating than men and view it as less affordable due to their role in family economic decisions. However, both these constraints can be addressed through education.
- **Youth.** A significant proportion of our young boys and girls have had fishing and boating experiences. The dropout rates are very high for both activities, but opportunities for increasing carryover into adulthood are good. Greater understanding of the reasons for this abrupt change in participation is needed to address this problem.

Market Segments Needing More Study

Recommending lower priority for some market segments is difficult because some of these market segments should be priorities in some instances. Hispanics comprise a substantial proportion of the state population and anglers and boaters in Arizona, Florida, Texas, New Mexico and California. Further, they are one of the fastest growing segments of the U.S. population. Not marketing to this group would be inadvisable at the state level. From a national perspective, the population of Blacks and Asians is small and both have low participation rates. Specifically targeting these segments in a national campaign would require substantial resources.

Directly targeting Blacks and Hispanics at this time may be unwise for other reasons as well. We do not know much about their motivations, constraints, and participation patterns. This is a badly needed area of research that will help us understand their needs and concerns better so appropriate messages and programs can be designed and implemented.

Research Priorities

- Greater understanding of the motivations, attitudes, socialization patterns, and constraints of Blacks and Hispanics is needed. Efforts to reach out to these segments of the population are important. The focus group work conducted by Responsive Management highlights some of the differences these groups may have from White anglers. It may be possible to market to multiple racial and ethnic groups if visual messages contain racial and ethnic mixes. Research has shown that Blacks and Hispanics identify with messages depicting and directed at their race or ethnic group. Messages in Spanish are more effective with Hispanic groups because of their level of acculturation and important cultural reinforcement needs.
- The limited boater work that has been conducted has focused primarily on boating participation and use. A handful of studies provide a disjointed view of boater characteristics, motivations, attitudes, and constraints. Generalizability is limited. Further, the analysis of subgroups of boaters based on gender, age, race, and other useful segmentation characteristics is needed.
- For both boating and fishing a focused marketing study is necessary if there is a desire to fine-tune messages and direct them through appropriate channels to specific segments. The use of multivariate clustering techniques with a broader array of lifestyle variables (attitudes, interests, and opinions) would be very useful.

Implications for Use of the Literature Review

This project was designed to help program partners and stakeholders understand current trends in recreational boating and fishing by providing a broad-based review of the factors associated with participation. The consistency with which some angler and boater characteristics occur across different segments allows for generalizations to be made with some confidence. For example, nearly all anglers and boaters feel that relaxation, escape from the daily routine, being in the outdoors with family and friends are very important reasons for participating in boating and fishing. The importance of these reasons holds true for those who have stopped participating or who are thinking about participating in the future. Appealing to these motivations in marketing messages can be used at all levels from national campaigns to specific local events sponsored by agencies and organizations.

The broader literature on recreational constraints helped clarify the context within which boaters and anglers encounter factors that deter participation. The limited work specifically dealing with boaters and anglers suggests that for many potential and previous participants information on structural constraints such as access, skills, and opportunities can be addressed through public information and programs. Intrapersonal and interpersonal constraints, while more ephemeral, can be influenced by information that changes what people believe about recreational boating and angling. Further research by agencies and organizations is needed to provide the detailed information about constraints effecting specific angling and boating segments. This will allow for more efficient design and delivery of specific information and programs to meet the needs of individual market segments.

The lack of information on the participation patterns and characteristics of specific market segments such as minorities, women, and youth or about specific age groups presently does not allow us to design specific outreach campaigns for these groups. Directed research is imperative if these important segments are to receive attention. Again, the broader outdoor recreation literature has shown that Blacks and Hispanics, in particular, have different participation patterns and needs than the traditional White angler or boater. Marketing to these groups may take different approaches than those traditionally used. Results from this literature review should help states with large minority populations begin focusing on their unique needs. States with smaller minority populations who want to begin outreach programs should also benefit.

Overall, the literature review identifies a clear need for focused research, particularly for boating. Little is known about non-boaters or dropouts. The little information available concerning boating constraints indicates the importance of some constraints generally not found among anglers. State and federal fisheries and boating agencies as well as non-governmental organizations can use the recommendations and literature from this project to build targeted surveys to aid them with their market research. Going beyond a general national marketing campaign will require these more focused studies.