

Boating and Fishing Attitude Segmentation Study

Prepared for:

Recreational Boating & Fishing
Foundation

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Objectives

Objectives

This research is designed to provide a more in-depth understanding of recreational boaters and anglers (current, lapsed and potential) by better understanding their attitudes, perceptions and ideas about boating and fishing.

The primary means of achieving this end involves the identification of specific boating and fishing consumer segments. These segments are based on:

- Attitudes toward fishing and boating
- Lifestyles and psychographics
- Fishing and boating behavior

The segments are defined, analyzed and presented in ways that are most appropriate for use in the development of marketing initiatives.

Methodology

Methodology

In order to meet these objectives, a two-phased research program was put into place. The first phase of the project consisted of qualitative research in the form of focus groups. These groups were designed to identify and explore consumer attitudes, issues, behavior and language.

Groups were conducted according to the following schedule:

April 16 in Kansas City

April 18 in Denver

April 30 in Philadelphia

May 2 in Ft. Lauderdale

Groups were conducted in diverse geographic settings so as to capture a range of experiences and perspectives and to ensure that both fresh water and salt water boating and fishing were represented. In order to participate, respondents had to qualify as either an avid, semi-avid, occasional or lapsed boater and/or angler. A mix of anglers and boaters was included in each group. Also, each group consisted of a mix of ages, race/ethnicity, educational level, occupations, and income levels. In each city, two groups were conducted: one with men and one with women.

A separate report on these focus groups was issued after their completion and is available on www.rbff.org/research.

Methodology

The second phase of this study consists of a national survey among recreational boaters and anglers and those interested in boating and fishing. Findings from the focus groups, along with input from RBFF and its stakeholders, provide the foundation and guidance for the national survey. In this second phase of the study, specific market segments are identified and analyzed.

Data for the national study were collected online, using an internet panel. In order to participate, respondents had to fall into one of the following categories of participation as either a boater, an angler or both:

- Avid: must have participated at least 10 times in the last year
- Semi-avid: must have participated at least 3-9 times in the last year
- Occasional: must have participated at least one time in the past 2 years but not more than 2 times in the past year
- Lapsed: participated as child but not as an adult, but would be somewhat or very interested in participating
- Prospective: have never participated but would be interested in boating and / or fishing

Totals were calculated separately for boating and fishing. Respondents could qualify as a boater only, as an angler only or as both. Definitions were provided by RBFF.

Methodology

Although a total sample of 1,000 - 1,200 was targeted, we received a total of 1,828 completed surveys from qualified respondents. With an online survey, it is not possible to control precisely the total number of responses. In order to ensure that we had a total sample of 1,000 - 1,200, we had to send the invitation to participate to a greater number than we expected to actually complete the survey. Hence, the targeted number of completes was exceeded.

To ensure sufficient numbers for analysis, quotas (of 100 each) were set for subsamples of African Americans and Hispanics. Quotas were also established to ensure an approximate equal distribution of males and females. No quotas were established for levels of participation (e.g., avid, semi-avid, and so forth).

The survey was fielded Nov. 25 - Dec. 9, 2002. In total, 3,393 completed questionnaires were returned. Of the returned questionnaires, 1,828 of the respondents were qualified to participate. This sample of 1,828 includes 126 African Americans and 123 Hispanics. In order to qualify, respondents had to be active (avid, semi-avid or occasional boaters and/or anglers) or they had to be lapsed or interested in participating in either boating or fishing. If a respondent did not qualify according to these criteria, their questionnaire was not included in the analysis.

This report details the findings from this national survey, including the identification and analysis of the consumer segments.

In the analysis, differences that are statistically significant at a 95% level of confidence are pointed out. Occasionally, the commentary points out a difference that is not significant at a 95% confidence level. In these instances, the differences are noted to make important observations about trends and findings. On these rare occasions, the commentary notes that the difference is not statistically significant at a 95% confidence level.

For reference, a copy of the questionnaire is appended to this report. In addition, a complete set of tabulations has been provided in a separate document.

Detailed Findings

Boating and Fishing Participants: Demographics and Behavior

Incidence of Boating

	<u>%</u>
<u>Total</u>	<u>41</u>
<u>Active Participant</u>	<u>28</u>
Avid	4
Semi-avid	5
Occasional	19
Lapsed (prospective)	4
Never participated (prospective)	9

Forty-one percent (41%) of those who responded to this survey currently boat, have boated in the past and are interested in boating again in the future, or have never boated but are interested in boating. This proportion is based to the entire population that responded, including those who do not participate currently and are not interested in participating. Thus, generally, it can be said that the incidence of boating or interest in boating is 41%. Twenty-eight percent (28%) currently participate. Four percent (4%) are avid boaters, compared to 5% who are semi-avid and 19% who are occasional. Another 4% previously boated but have not participated in the past two years and are interested in boating again in the future. And, 9% have never been boating but are interested in going boating. Thus, 13% could – potentially – be converted to active participants.

Incidence of Fishing

	<u>%</u>
<u>Total</u>	<u>41</u>
<u>Active Participant</u>	<u>32</u>
Avid	7
Semi-avid	8
Occasional	17
Lapsed (prospective)	4
Never participated (prospective)	5

Based on this internet survey, the incidence of active angling participants is 32%. That is, currently, 32% go fishing – either avidly (7%), semi-avidly (8%) or occasionally (17%). There is potential to attract another 9% in that 4% have been fishing in the past – just not in the past two years – and they would be interested in going fishing again. Five percent (5%) have never been fishing but find it appealing and would be interested in fishing sometime in the future.

Gender

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Male	50	61	44	45	56
Female	50	39	56	55	44

By design, half of the sample is female and half is male. Those who boat but do not fish (61%) and prospective boaters and anglers (56%) are more likely to be male. Those who fish only (56%) are most likely to be female. Similarly, those that both boat and fish are more likely to be female (55%).

Marital Status

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Single, never married	17	22	13	14	20
Single, previously married	13	11	12	13	15
Married	63	57	69	66	58
Living with someone	8	10	7	7	7

While they tend to be married, boaters and anglers also represent the diversity of today's society in that they are represented in all marital statuses. Boaters do, however, indicate a slightly greater tendency to be single than do anglers. (Note: This difference is not statistically significant at a 95% confidence level.)

Household Size

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
1 person	14	14	11	15	17
2 people	38	39	40	39	32
3-5 people	44	44	44	42	46
More than 5 people	5	4	5	5	5

Boaters and anglers tend to live in households of at least two people. This is particularly true for those who fish but do not boat. Only 11% of this group report that they live in a single person household.

Number of Children Under 18

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
None	60	59	58	63	59
1 child	17	18	17	14	19
2 children	16	17	16	15	15
3 children	5	4	7	6	5
4 children	1	1	2	1	2
More than 4 children	1	1	1	1	1

Boaters and anglers tend to have no children or only one or two children under age 18. Only a few (10% or less) have three or more children under 18.

Number of Children Under 6

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>	
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	
None	82	81	81	84	81	Approximately 20% have children under age six.
1 child	12	13	13	11	13	
2 children	6	6	6	6	6	
3 children	<1	1	1	<1	-	
4 children	-	-	-	-	-	
More than 4 children	<1	<1	-	-	-	

Number of Children Ages 6-12

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
None	79	80	79	79	80
1 child	14	15	15	13	14
2 children	6	4	5	7	5
3 children	1	1	1	1	1
4 children	<1	-	-	<1	<1

About 20% also have children between the ages of 6-12.

Number of Children Ages 13-17

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
None	83	84	80	86	83
1 child	13	14	14	10	13
2 children	4	2	5	3	4
3 children	<1	<1	1	<1	<1
4 children	<1	-	<1	-	<1

Slightly less than 20% have children between the ages of 13-17.

Grandparents

<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
30	23	34	32	26

Nearly one-third (30%) of boaters and anglers are grandparents. Those who fish but do not boat (34%) are most likely to be grandparents. In contrast, those who boat but do not fish (23%) are least likely to be grandparents.

Number of Grandchildren Under 18

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Prospective</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
None	2	1	2	<1	5
1 grandchild	18	21	19	16	20
2 grandchildren	21	23	17	21	25
3 grandchildren	16	19	15	17	5
4 grandchildren	12	10	11	15	10
5 - 10 grandchildren	12	10	11	15	10
More than 10 grandchildren	27	23	31	28	20

Boaters and anglers who are grandparents tend to have 1-3 grandchildren. Participants who go fishing – whether or not they also go boating – are more likely to have five or more grandchildren.

Based to those who are grandparents.

Level of Education

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Some high school	2	1	2	2	2
Completed high school	15	10	21	16	13
Trade / technical school	6	5	6	6	6
Some college	34	29	36	33	38
Completed college	27	34	24	28	24
Graduate studies	16	22	12	15	16

Anglers and boaters have diverse educational backgrounds. Most have at least a high school degree (98%). Boaters are more likely than anglers to have at least a college degree. The educational level seems to be slightly skewed higher than would be expected. This may reflect the impact of the internet data collection methodology.

Note: Internet usage is related to level of educational attainment. The higher the level of educational attainment, the more likely the use of the internet. Among those with less than a high school education, only 12.8% use the internet. Among those with at least a bachelor's degree, 83.7% use the internet. Source: *A Nation Online: How Americans Are Expanding their Use of the Internet*, February, 2002, U.S. Department of Commerce.

Employment Status

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
<u>Employed</u>	<u>70</u>	<u>74</u>	<u>65</u>	<u>69</u>	<u>69</u>
Full-time	53	54	49	53	54
Part-time	10	13	11	10	8
Full-time at home	4	4	2	4	4
Part-time at home	3	3	3	2	3
Not currently employed	9	8	9	8	12
Retired	15	10	17	18	13
Stay at home parent	7	9	7	5	7

Boaters and anglers tend to be employed (70%). Anglers – whether they also boat or only fish – are least likely to be employed. They are also most likely to be retired.

Occupation

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Professional	21	22	18	19	24
Exec/Adm/ Mng.	26	24	28	30	21
Adm & Tech. Support	29	31	25	25	35
Retail	9	9	10	9	9
Services	8	6	12	8	7
Construct- ion	5	4	3	7	2
Agriculture	1	1	2	2	<1
Real estate	2	3	2	1	1

Current boaters and anglers tend to be spread across all occupational types. Those that fish only are slightly more likely to work in the service industry than are the other participant categories. Those that both boat and fish are slightly more likely to be in the construction industry than is true for the other boating and fishing categories. A higher proportion of prospective boaters and anglers are concentrated in the professional and administration and technical support fields. (Note: This last difference, however, is not statistically significant at a 95% level of confidence.)

Income

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
< \$10,000	4	2	3	3	6
\$10,000 - \$34,999	23	18	28	22	25
\$35,000 - \$49,999	23	19	26	23	24
\$50,000 - \$74,999	22	22	21	23	23
\$75,000 - \$99,999	15	21	10	16	13
\$100,000 - \$149,999	9	13	7	9	7
\$150,000 - \$199,999	2	2	3	2	1
\$200,000 +	2	2	1	2	1

Income levels of boating and fishing participants are concentrated in the low-to-middle income ranges (up to \$75,000). Anglers are particularly likely to be in the lowest income groups. Nearly one-third (31%) of those who fish but do not boat report an income level of less than \$35,000.

Currently Own Home

<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
70	72	68	76	61

Seventy percent (70%) of current and prospective boaters and anglers own their own homes. Prospective participants (61%) and those who currently only fish (68%) are less likely than the other groups to own their own homes.

Length of Time at Current Residence

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Less than 1 year	13	12	14	13	15
1 – 4 years	30	35	26	29	32
5 – 9 years	22	19	24	23	20
10 + years	35	35	37	36	32

Boaters and anglers tend to be stable in that only 15% or less have lived at their current residence for less than a year. Prospective boaters and anglers are slightly less likely than the active participants to have lived at their current residence for at least five years. Nevertheless, over half (52%) of this group has lived at their current residence for at least 10 years.

Race / Ethnicity

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
White, non-Hispanic	81	81	77	86	76
African American	7	6	7	3	13
Hispanic	7	6	10	6	7
Asian	2	2	2	2	2
Native American	2	2	1	2	1
Other	2	3	3	2	1

Predominantly, participating and prospective anglers and boaters are white (81%). Nevertheless, 13% of the prospective participants are African American.

Note: The sample was designed to include sufficient numbers of African Americans and Hispanics for analysis. A total of 100 African Americans and 100 Hispanics were targeted. In order to ensure that these quotas were met, the invitation to participate was sent to more African Americans and Hispanics than would be sent if no quotas were set. Thus, there may be more African Americans and Hispanics included in this sample than would occur randomly in the population. It is not possible to estimate precisely the extent of over sampling due to the internet data collection methodology.

Age

	<u>Total</u>	<u>Boat only</u>	<u>Fish only</u>	<u>Both</u>	<u>Pro- spective</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
18 – 20	1	1	2	2	<1
21 – 25	5	7	4	5	5
26 – 30	9	10	10	8	10
31 – 35	13	17	10	12	15
36 – 40	12	13	10	14	11
41 – 50	26	21	28	24	29
51 – 60	20	21	20	19	19
Over 60	13	10	16	16	10

Boaters and anglers tend to be concentrated in the middle age ranges – 31 to 50 years of age. Fewer boaters and prospective boaters / anglers are older (over 60) than is true for anglers.