

Who Participates in Boating and Fishing: Self Descriptions and Imagery

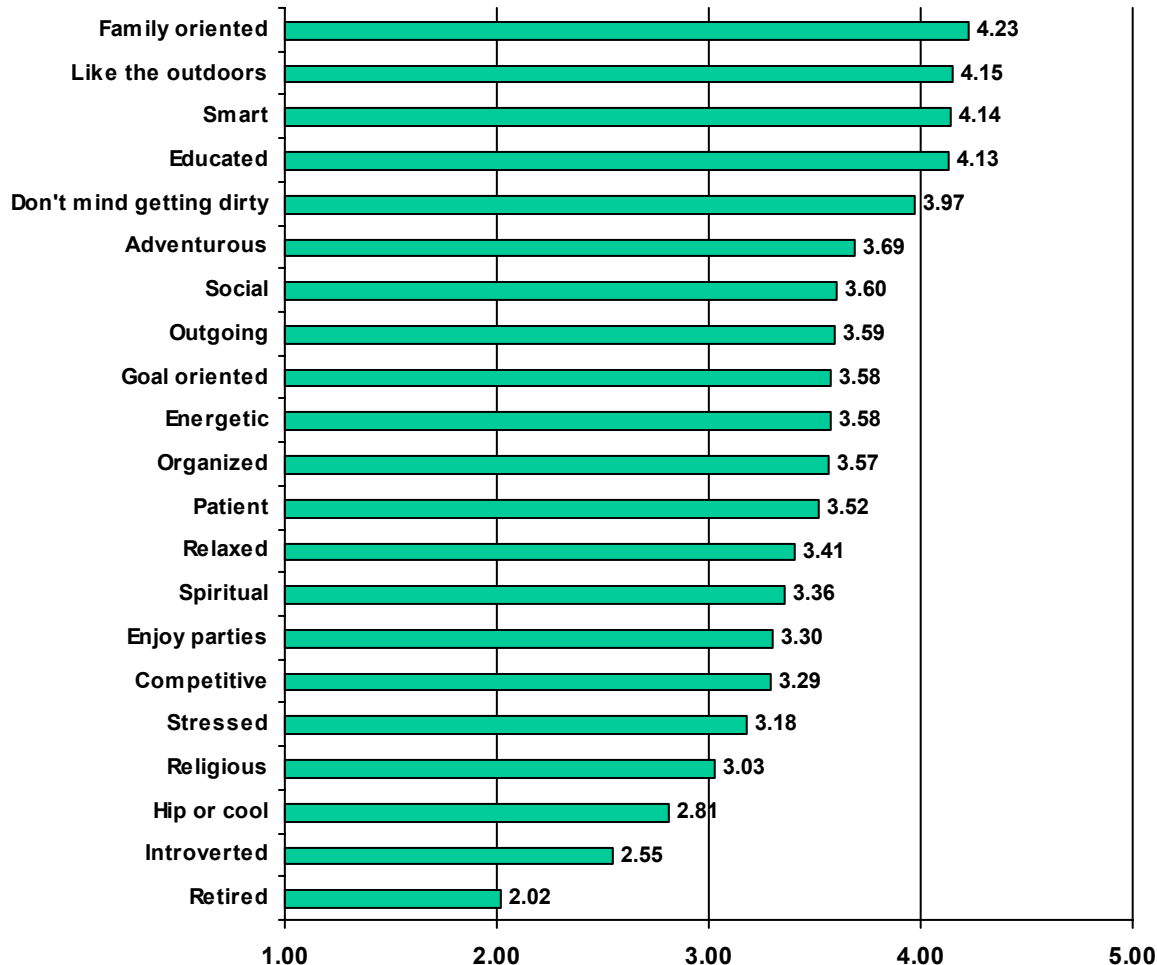
Who Participates in Boating and Fishing

Boaters and anglers tend to view themselves as being family oriented, liking the outdoors, smart, educated, and not minding getting dirty. They are less likely to see themselves as introverted, hip or cool, or religious.

In spite of these common traits, boaters and anglers tend to view themselves in slightly different ways. Boaters tend to see themselves as more “social” than do anglers. Boaters, whether they both boat and fish or just boat, tend to see themselves as more social, more outgoing, and as enjoying parties.

Those who like to go boating are also seen as liking the outdoors, being adventurous, relaxed, energetic, family oriented, and not minding to get dirty. Anglers are viewed as people who like the outdoors and who don't mind getting dirty. They are also viewed as patient and family oriented. They are less likely to be viewed as social than are boaters.

Self Description - Total Sample -

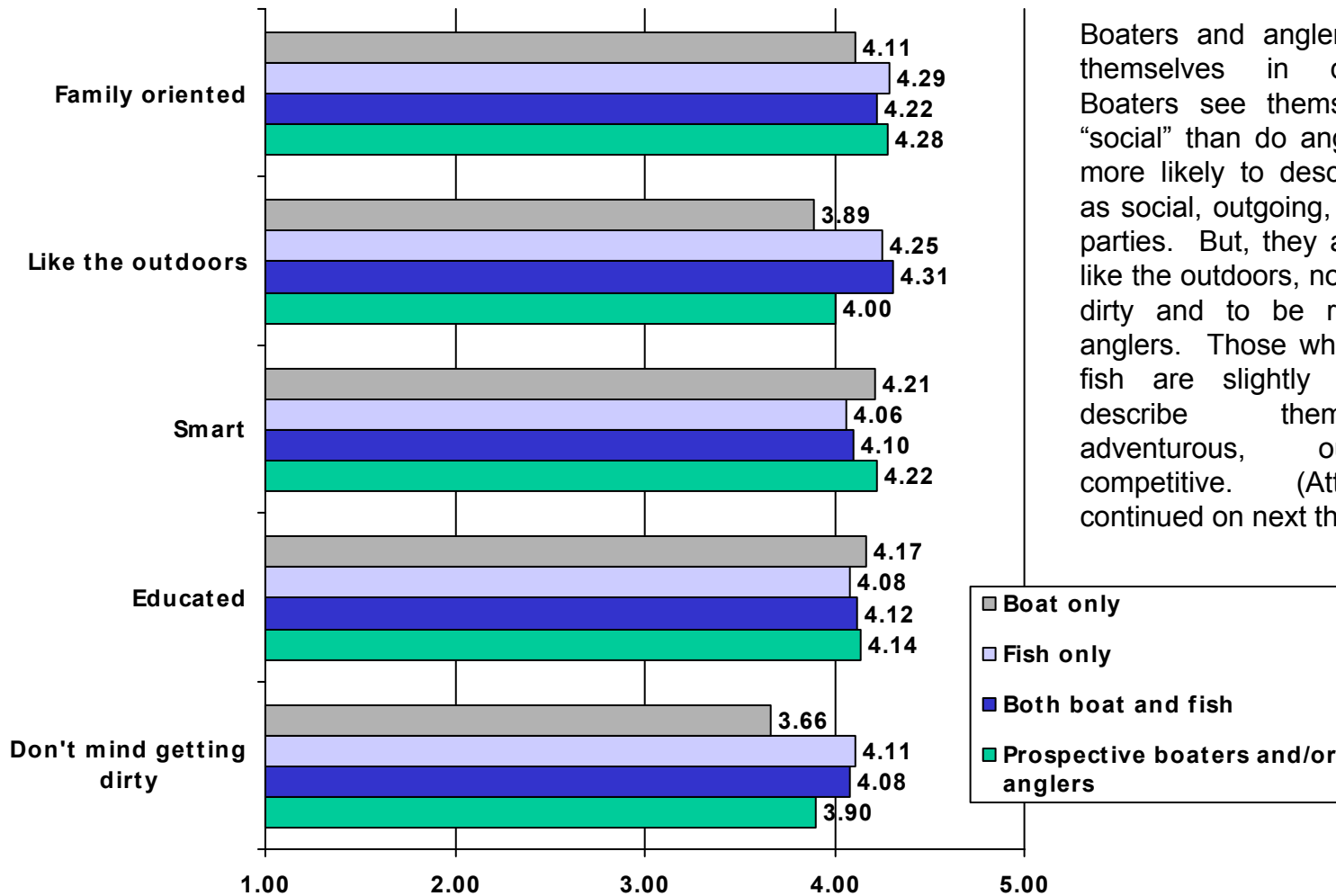


Most frequently, boaters and anglers, as well as prospective boaters and anglers, describe themselves as family oriented, liking the outdoors, smart, educated, and they don't mind getting dirty. They also often see themselves as adventurous, social, outgoing, goal oriented, energetic, organized, and patient.

In contrast, they are less likely to describe themselves as retired, introverted, hip or cool, or religious.

Mean score on a 5-point scale where the higher the score the more the characteristic describes the respondent.

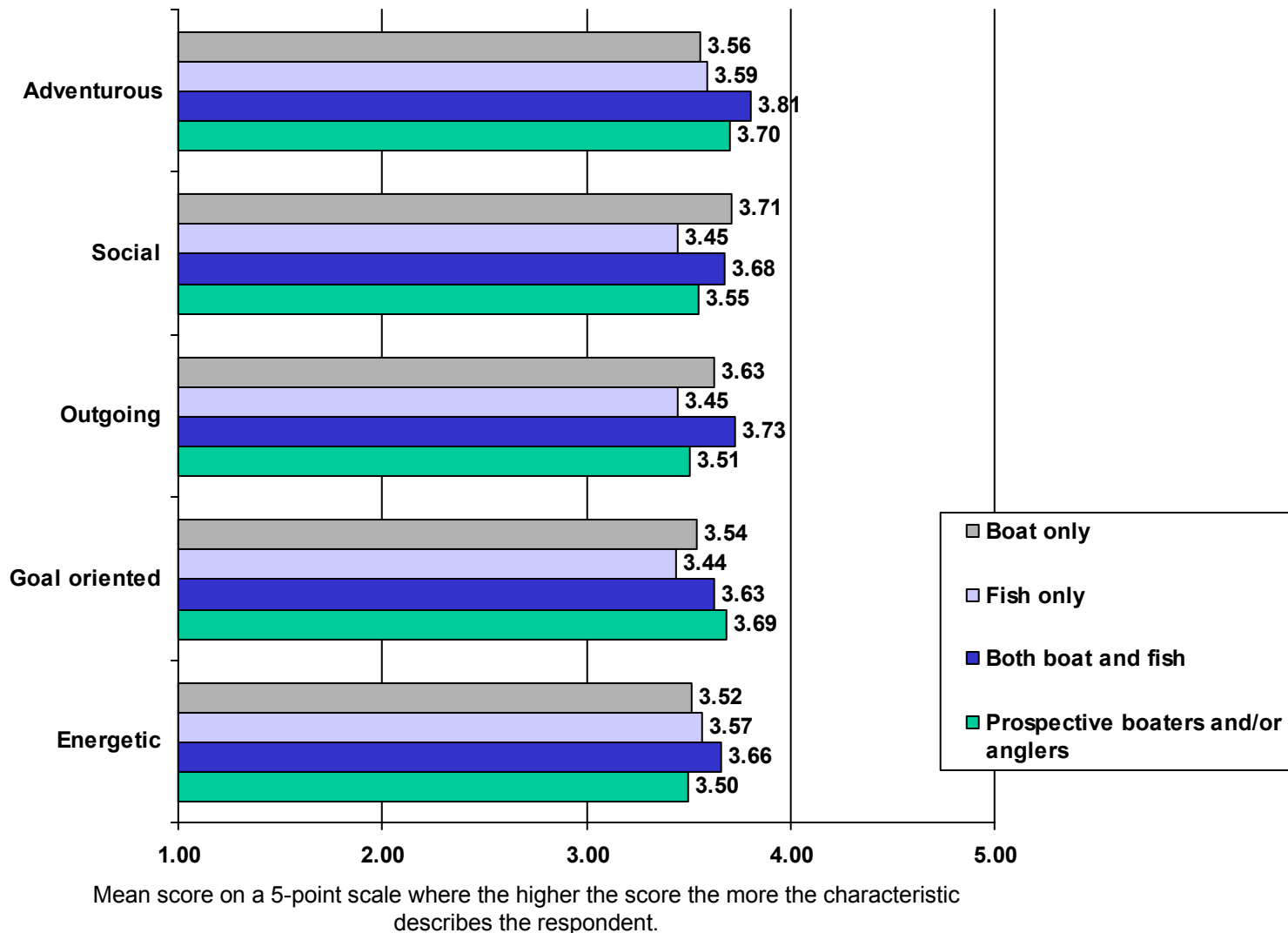
Self Description



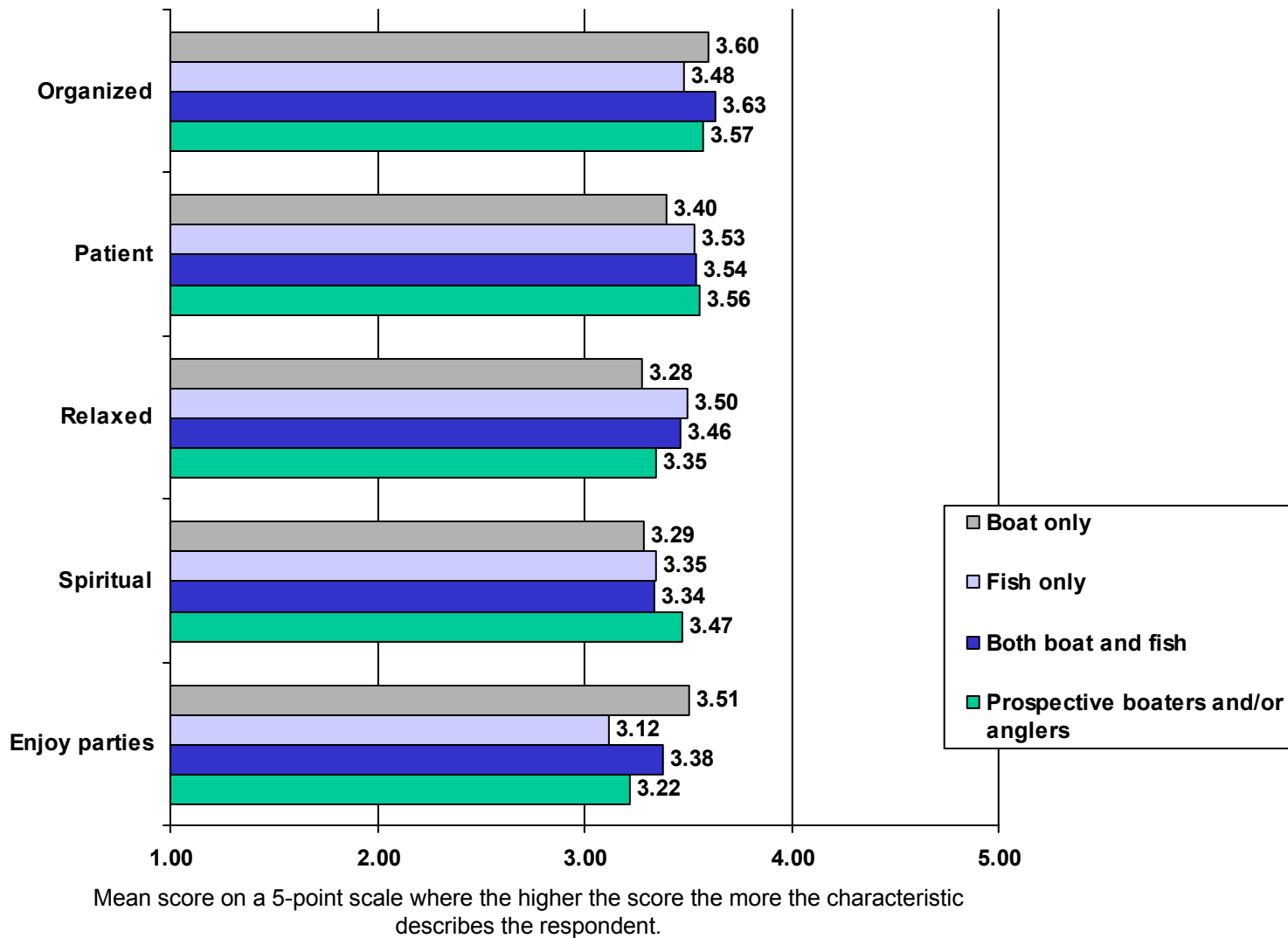
Boaters and anglers tend to view themselves in different ways. Boaters see themselves as more “social” than do anglers. They are more likely to describe themselves as social, outgoing, and as enjoying parties. But, they are less likely to like the outdoors, not to mind getting dirty and to be retired than are anglers. Those who both boat and fish are slightly more likely to describe themselves as adventurous, outgoing and competitive. (Attribute listing continued on next three pages.)

Mean score on a 5-point scale where the higher the score the more the characteristic describes the respondent.

Self Description (con't)



Self Description (con't)



Self Description (con't)

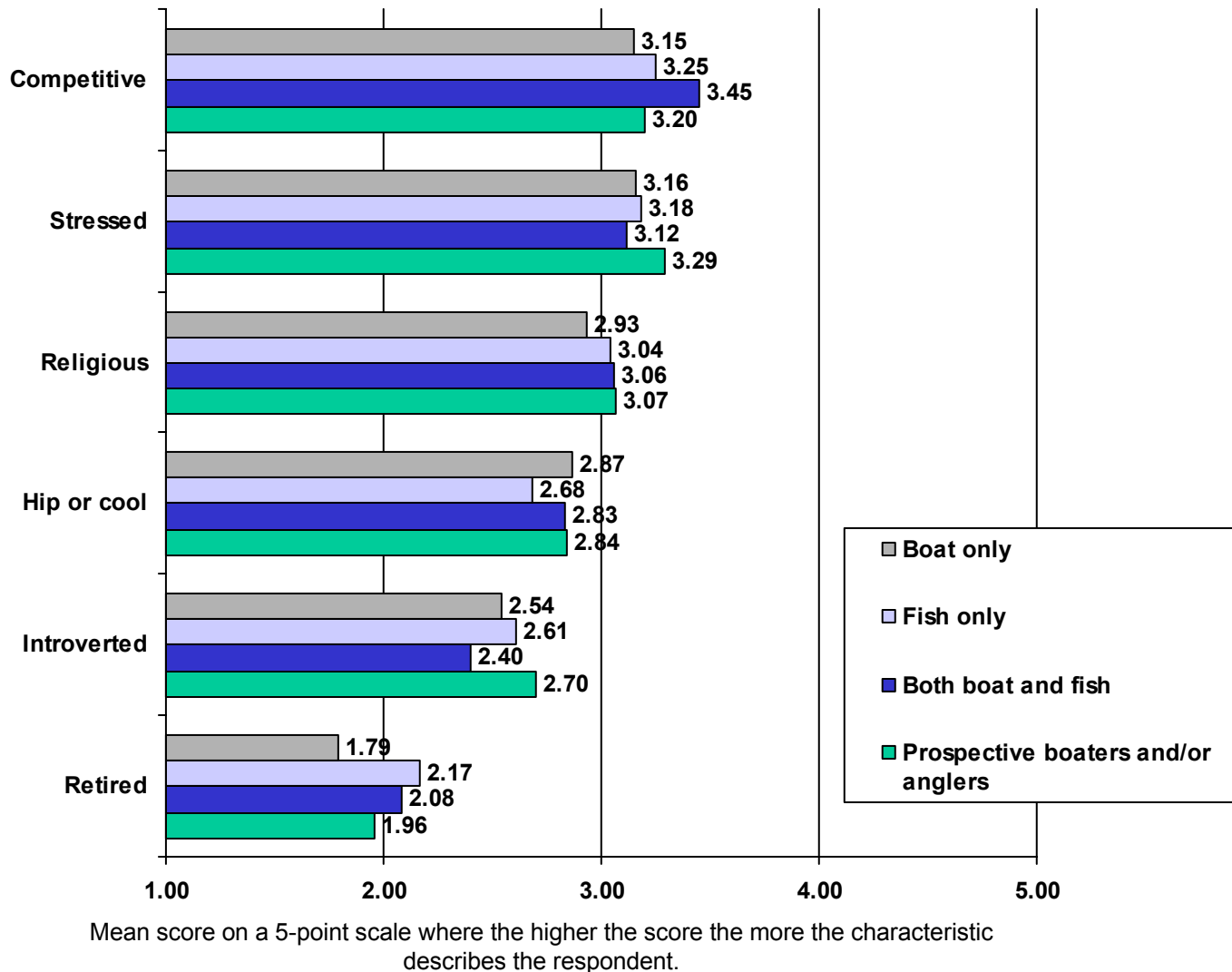
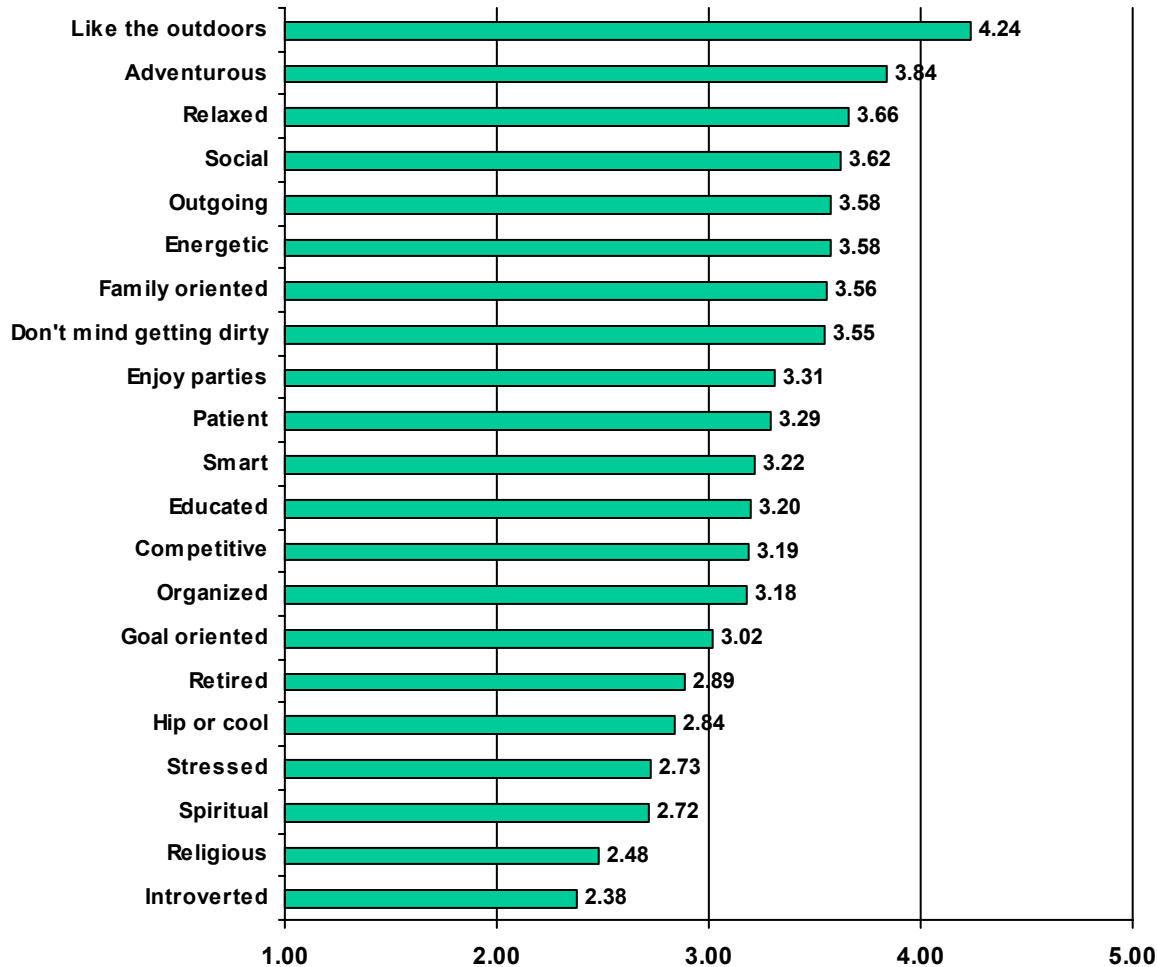


Image of Boaters - Total Sample -

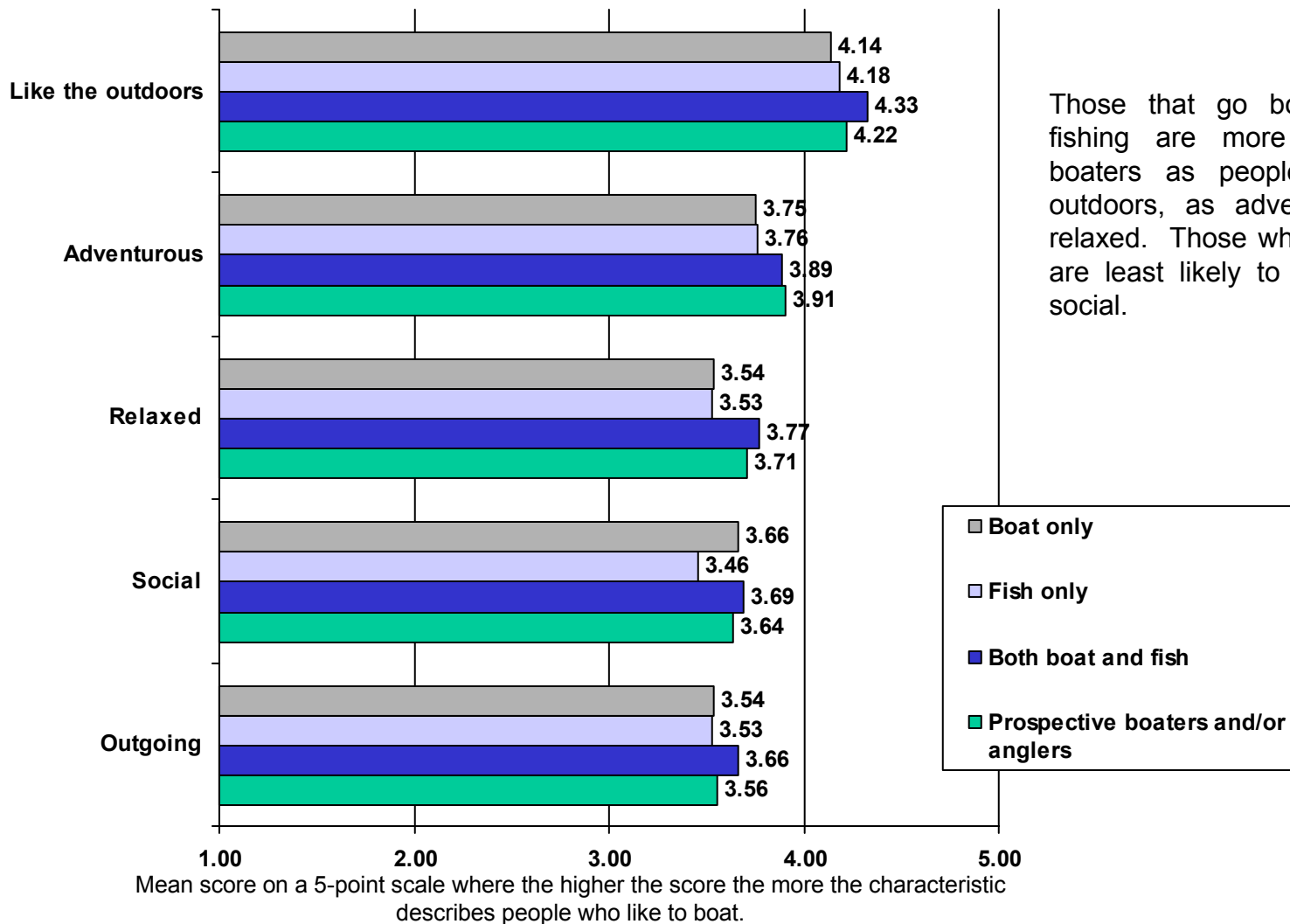


People who like to go boating are viewed as liking the outdoors, being adventurous, relaxed, social, outgoing, energetic and family oriented, and as not minding to get dirty.

They are less likely to be viewed as introverted, religious, spiritual, stressed, hip or cool, and as being retired.

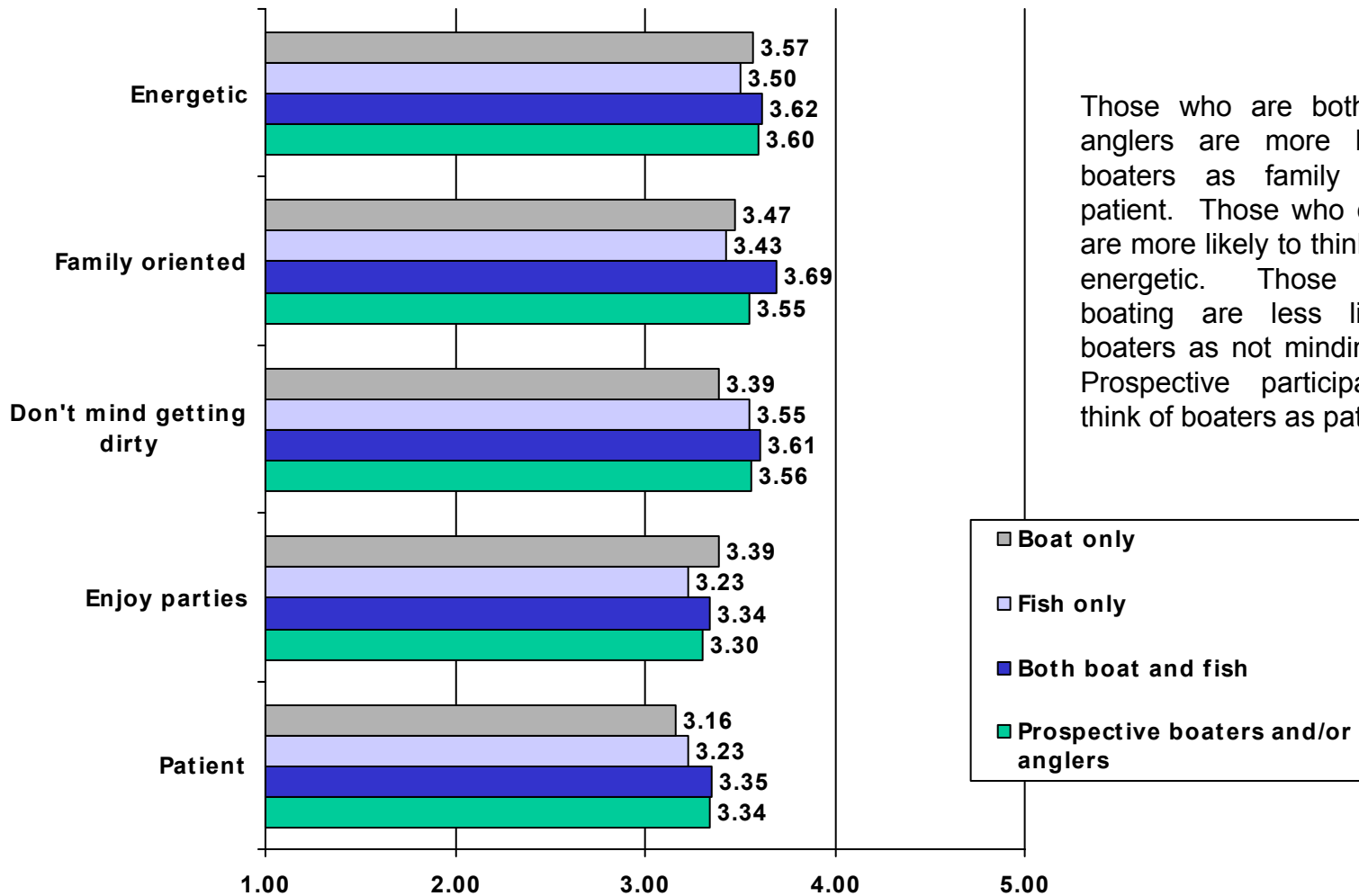
Mean score on a 5-point scale where the higher the score the more the characteristic describes people who like to boat.

Image of Boaters



Those that go both boating and fishing are more likely to view boaters as people who like the outdoors, as adventurous and as relaxed. Those who go fishing only are least likely to view boaters as social.

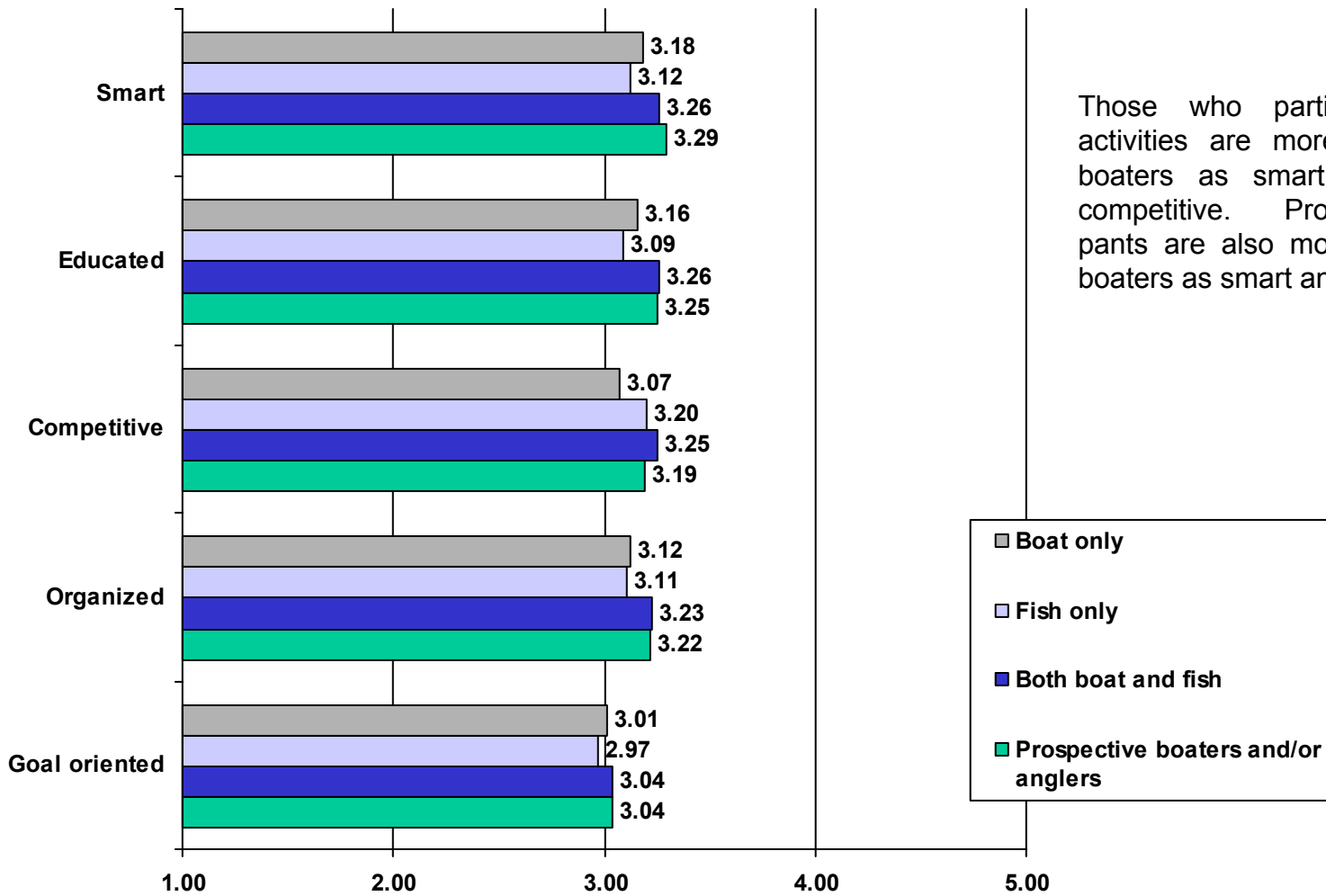
Image of Boaters (con't)



Those who are both boaters and anglers are more likely to view boaters as family oriented and patient. Those who only go fishing are more likely to think of boaters as energetic. Those who only go boating are less likely to view boaters as not minding to get dirty. Prospective participants tend to think of boaters as patient people.

Mean score on a 5-point scale where the higher the score the more the characteristic describes people who like to boat.

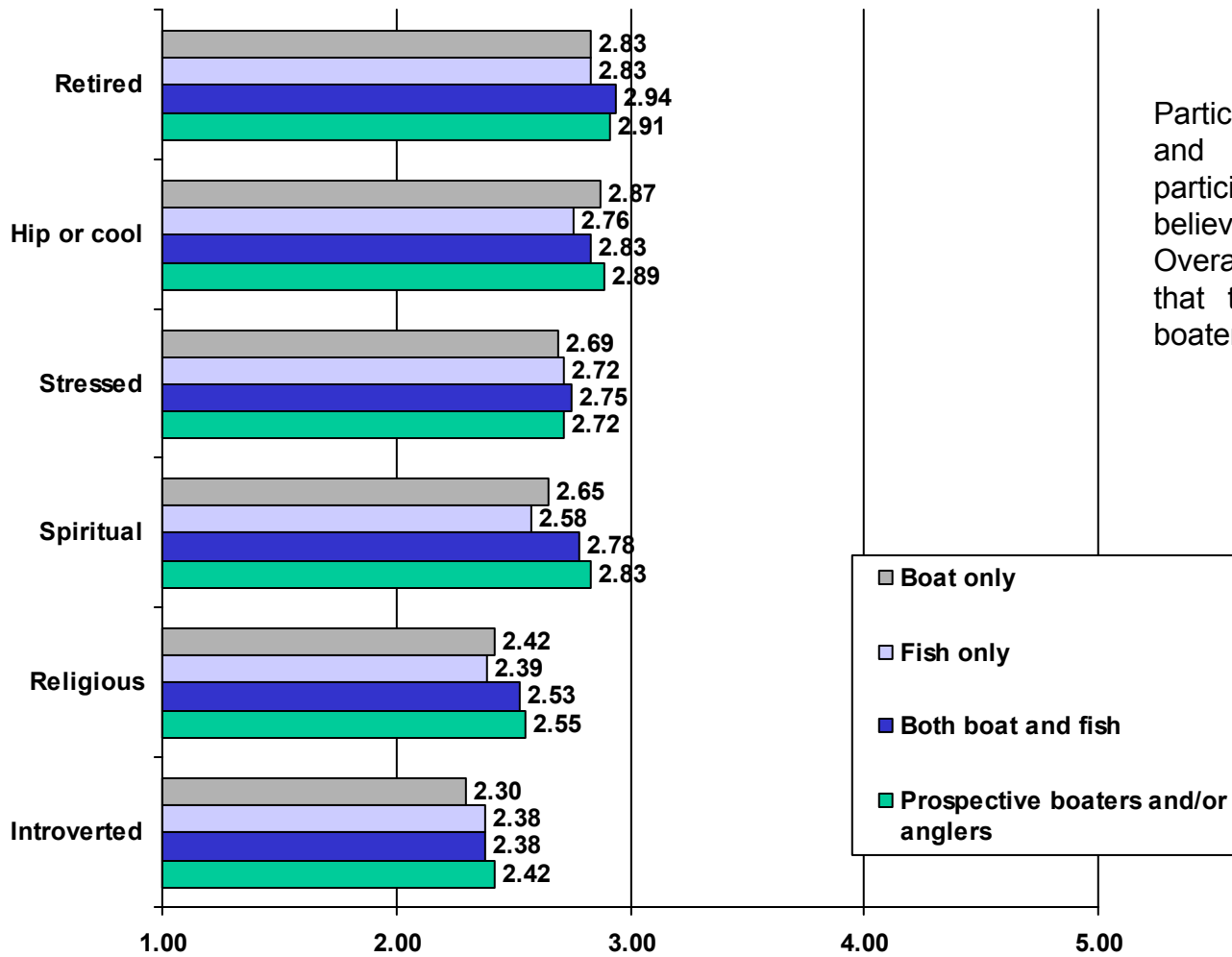
Image of Boaters (con't)



Those who participate in both activities are more likely to view boaters as smart, educated and competitive. Prospective participants are also more likely to view boaters as smart and educated.

Mean score on a 5-point scale where the higher the score the more the characteristic describes people who like to boat.

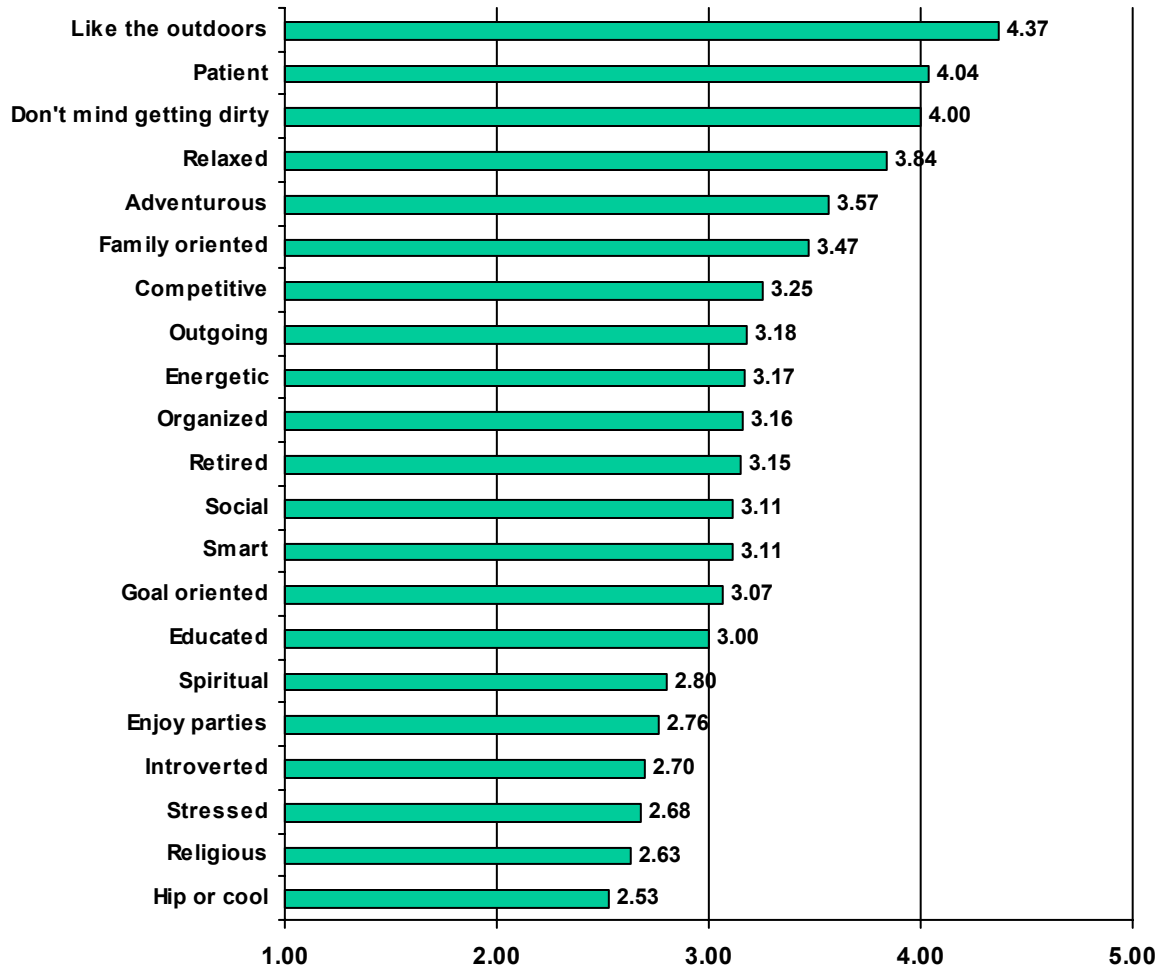
Image of Boaters (con't)



Participants who go both boating and fishing and prospective participants are more likely to believe that boaters are spiritual. Overall, however, this is not a trait that tends to be associated with boaters.

Mean score on a 5-point scale where the higher the score the more the characteristic describes people who like to boat.

Image of Anglers - Total Sample -

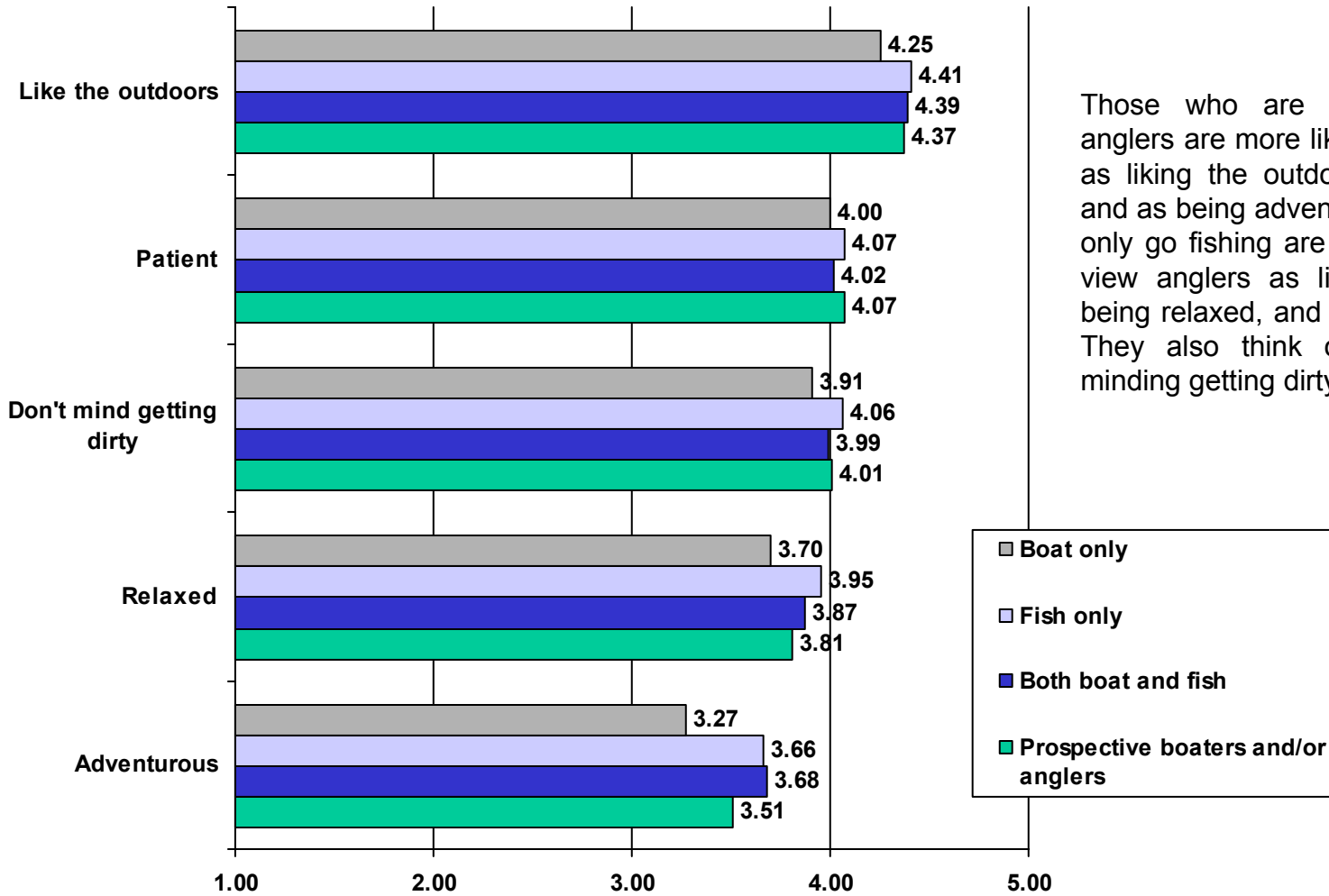


People who like to go fishing are viewed as liking the outdoors, being patient, not minding to get dirty and as being relaxed. They are also viewed as being adventurous, family oriented, somewhat competitive, outgoing, energetic, organized, retired, social, smart, goal oriented, and as educated.

In contrast, anglers are less likely to be viewed as hip or cool, religious, stressed, introverted, as enjoying parties and as being spiritual.

Mean score on a 5-point scale where the higher the score the more the characteristic describes people who like to fish.

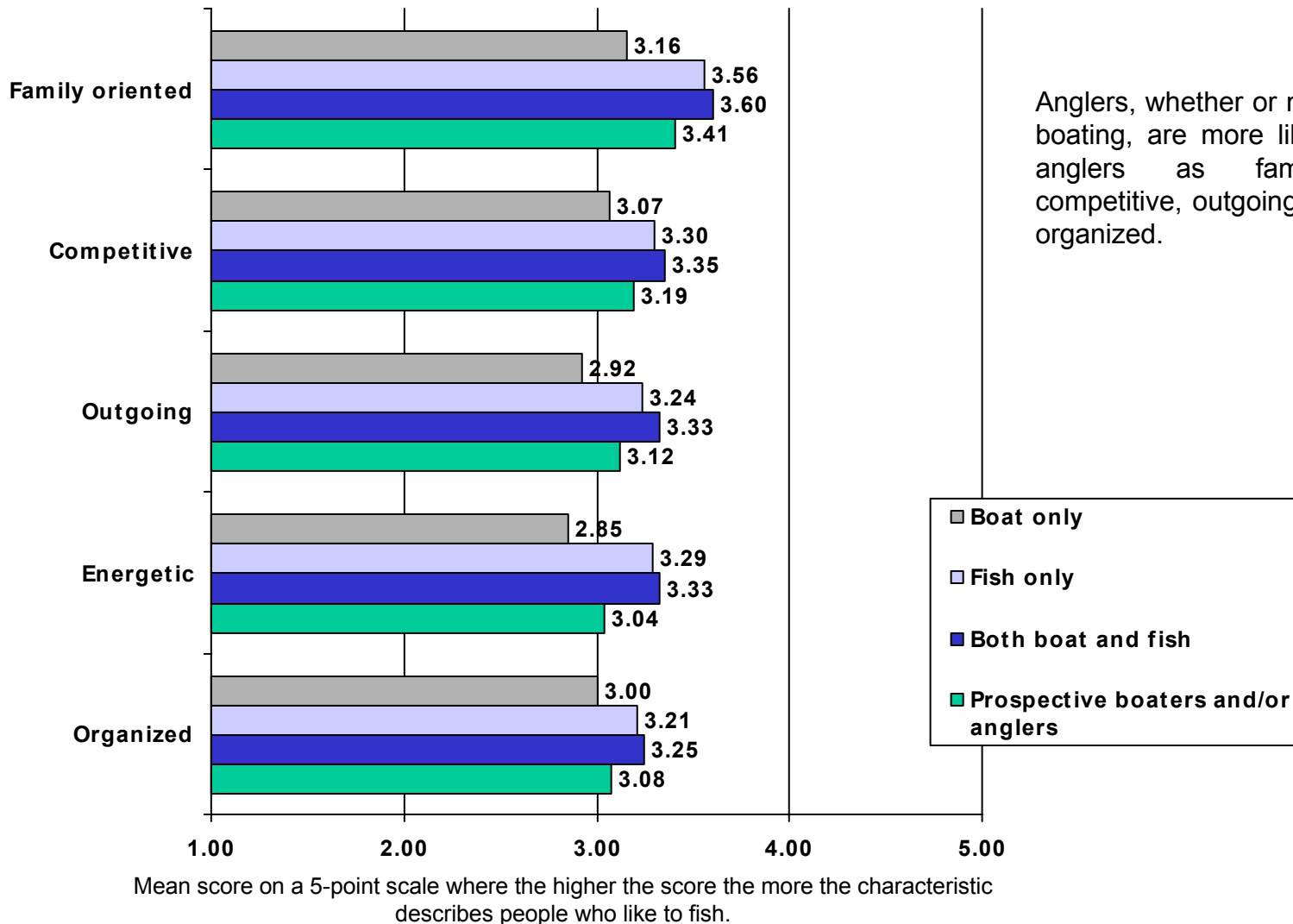
Image of Anglers



Those who are both boaters and anglers are more likely to view anglers as liking the outdoors, being relaxed and as being adventurous. Those who only go fishing are also more likely to view anglers as liking the outdoors, being relaxed, and being adventurous. They also think of anglers as not minding getting dirty.

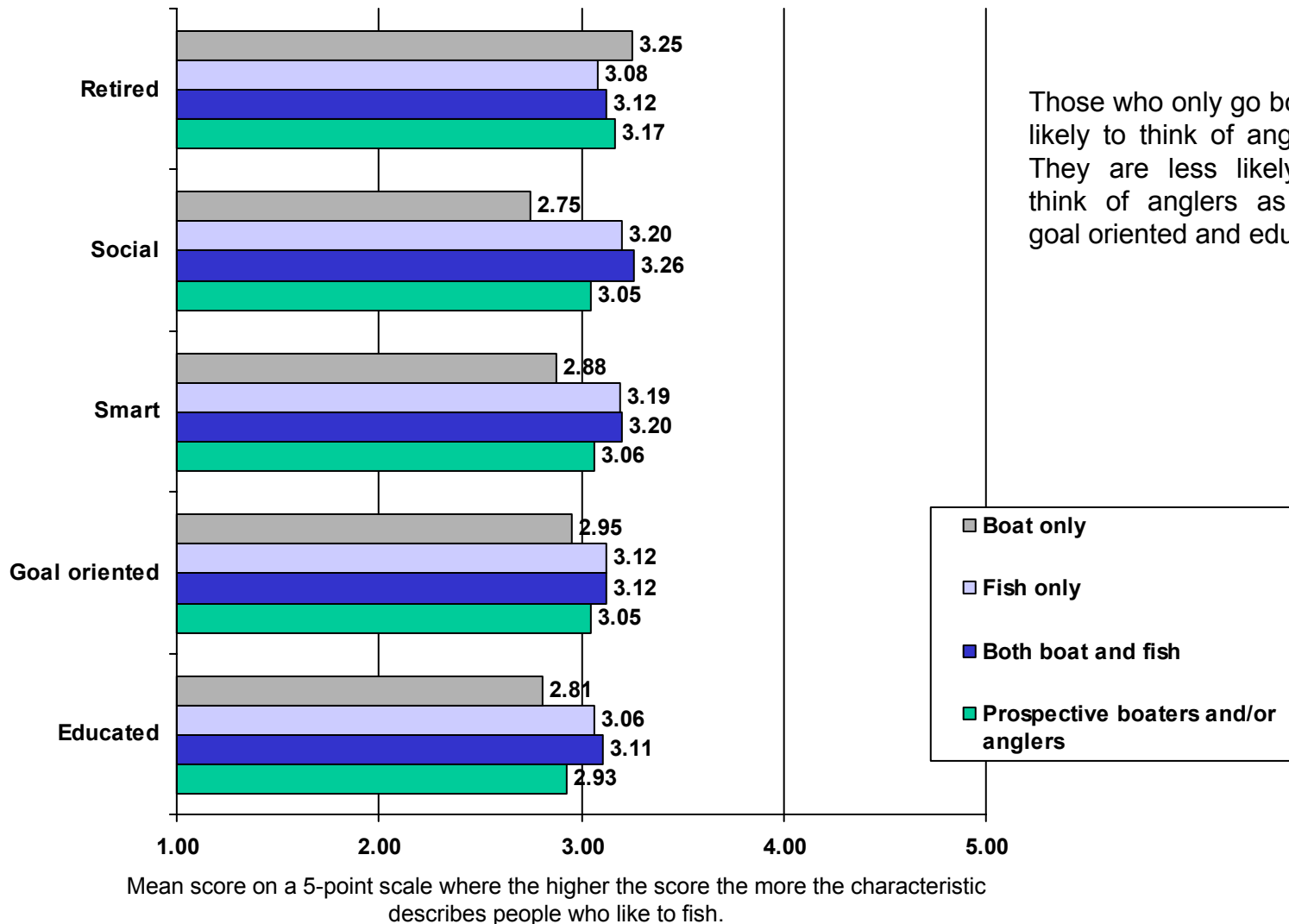
Mean score on a 5-point scale where the higher the score the more the characteristic describes people who like to fish.

Image of Anglers (con't)



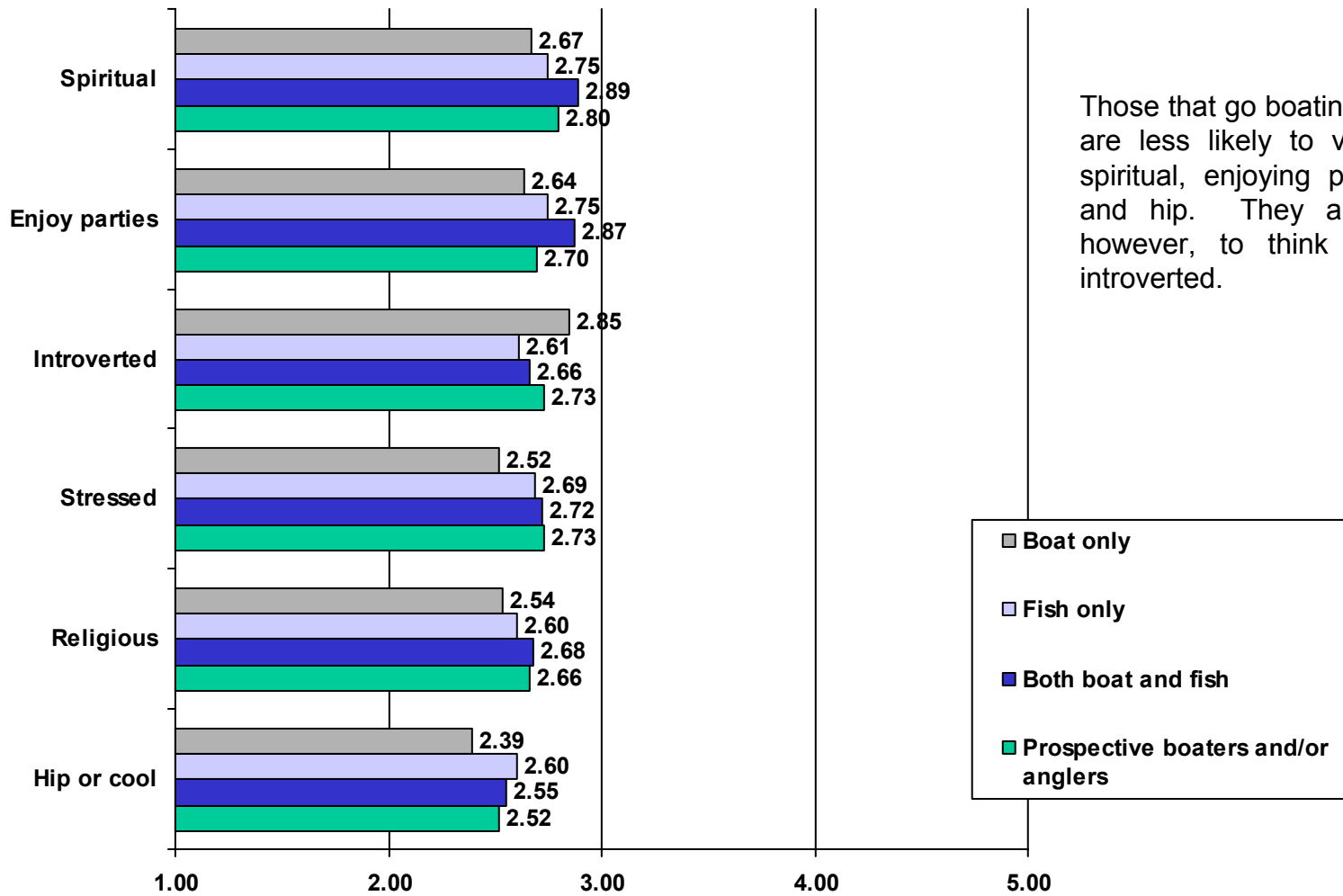
Anglers, whether or not they also go boating, are more likely to think of anglers as family oriented, competitive, outgoing, energetic and organized.

Image of Anglers (con't)



Those who only go boating are more likely to think of anglers as retired. They are less likely, however, to think of anglers as social, smart, goal oriented and educated.

Image of Anglers (con't)



Those that go boating but not fishing are less likely to view anglers as spiritual, enjoying parties, stressed and hip. They are more likely, however, to think of anglers as introverted.

Mean score on a 5-point scale where the higher the score the more the characteristic describes people who like to fish.

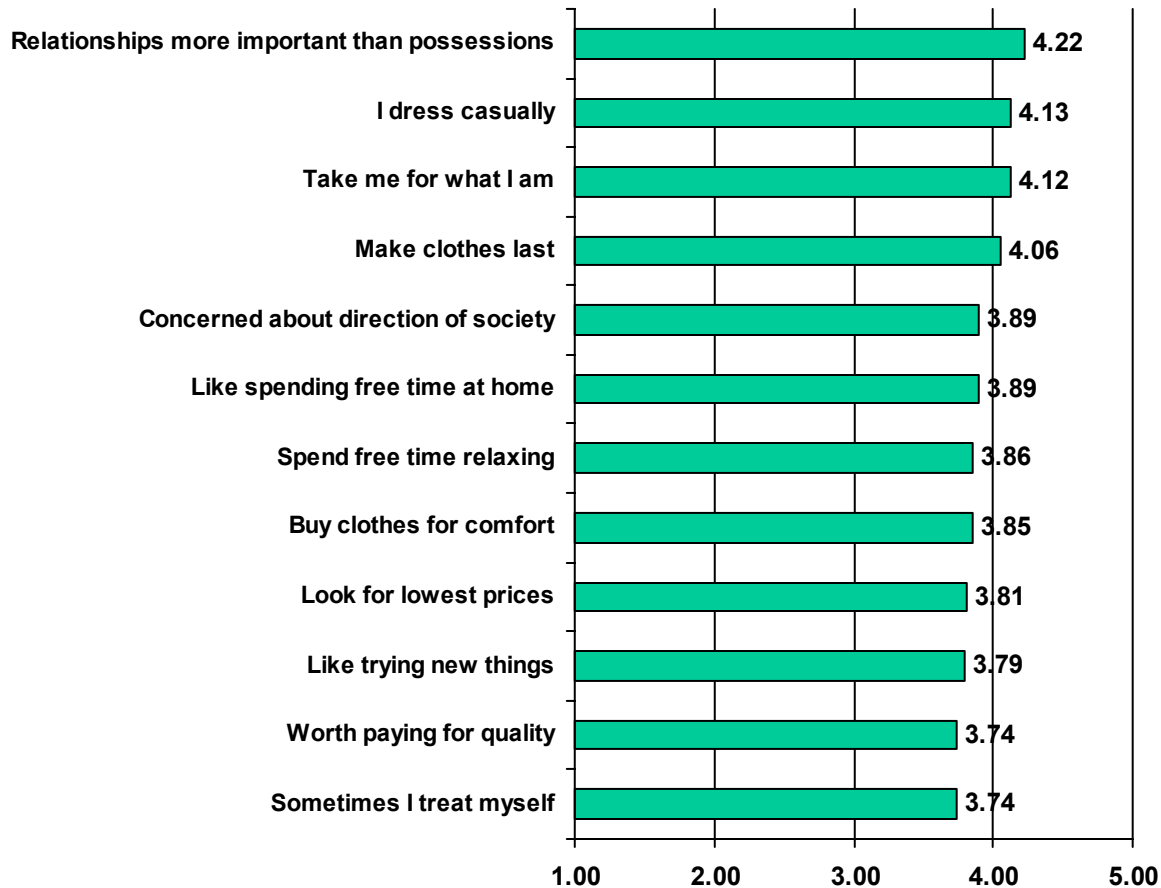
Lifestyles Associated with Recreational Boating and Fishing

Lifestyles Associated with Recreational Boating and Fishing

Based on reaction to a list of 39 lifestyle traits, current and prospective boaters and anglers can be described as “down to earth” in terms of their lifestyles. They tend to value relationships more than possessions. They like to live in unpretentious ways in that they dress casually and buy clothes for comfort, they want people to take them for what they are and they try to make their clothes last. They seem to adopt a “back to basics” philosophy in that they are concerned about the direction society is headed, and they like spending free time relaxing at home. They will sometimes indulge themselves with a treat, but tend to look for quality and low prices. They seem not too interested in the social symbolism of their car, and they do not use a credit card to buy more than they can afford. They feel that they hold fast to their beliefs and are not swayed by other people.

It is possible to identify differences in lifestyles among current and prospective anglers and boaters using these attributes. However, differences tend to be minor and the patterns are not particularly meaningful. By segmenting boaters and anglers -- both current and prospective -- according to their recreational and leisure needs and, then, profiling these segments by lifestyle traits, more meaningful differences are identified. This analysis is reported in the section of this report which describes the market segments identified.

Lifestyle Profile - Total Sample -

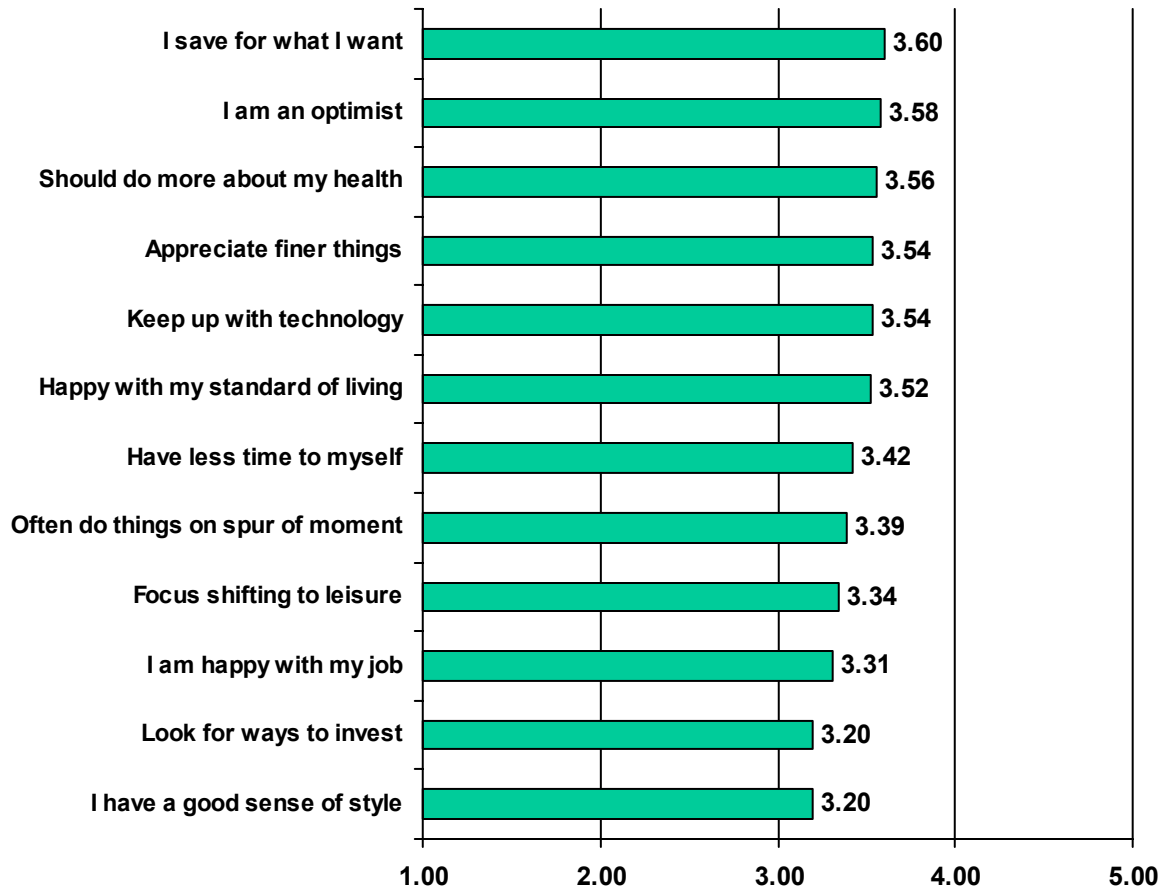


Current and prospective boaters and anglers are “down to earth” people. They tend to believe that relationships are more important than possessions, dress casually, believe people should take them for what they are, and make their clothes last. These people are also concerned about the direction of society, like spending free time at home, also spend free time relaxing, buy clothes for comfort, look for lowest prices, like trying new things, believe it is worth paying more for quality, and sometimes treat themselves.

Mean score on a 5-point scale where the higher the score the more the characteristic describes the respondent.

Lifestyle Profile (con't)

- Total Sample -

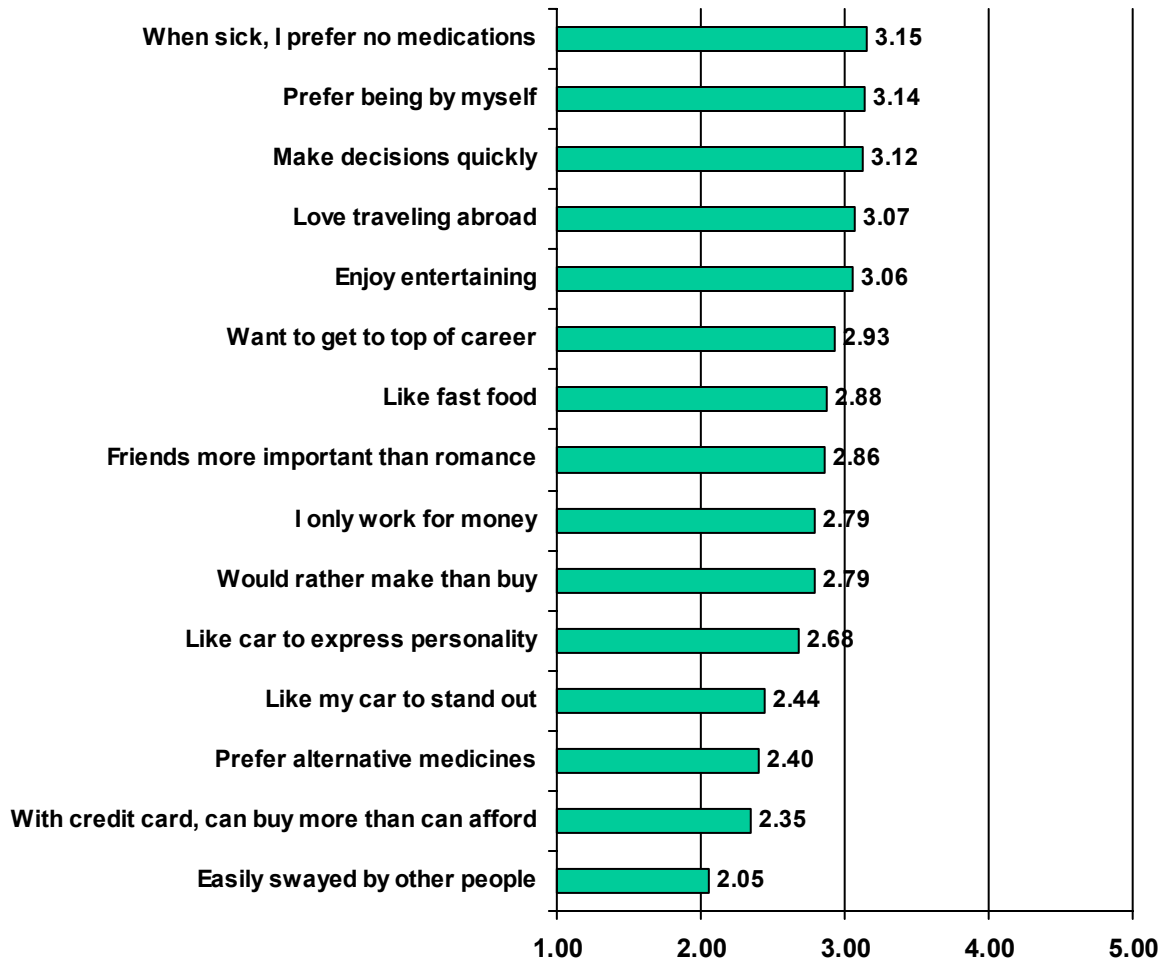


In the moderate range of appropriate lifestyle descriptors, boaters and anglers save for what they want, are generally optimistic, think they should do more about their health, appreciate the finer things in life but are generally happy with their standard of living. They also try to keep up with developments in technology.

Mean score on a 5-point scale where the higher the score the more the characteristic describes the respondent.

Lifestyle Profile (con't)

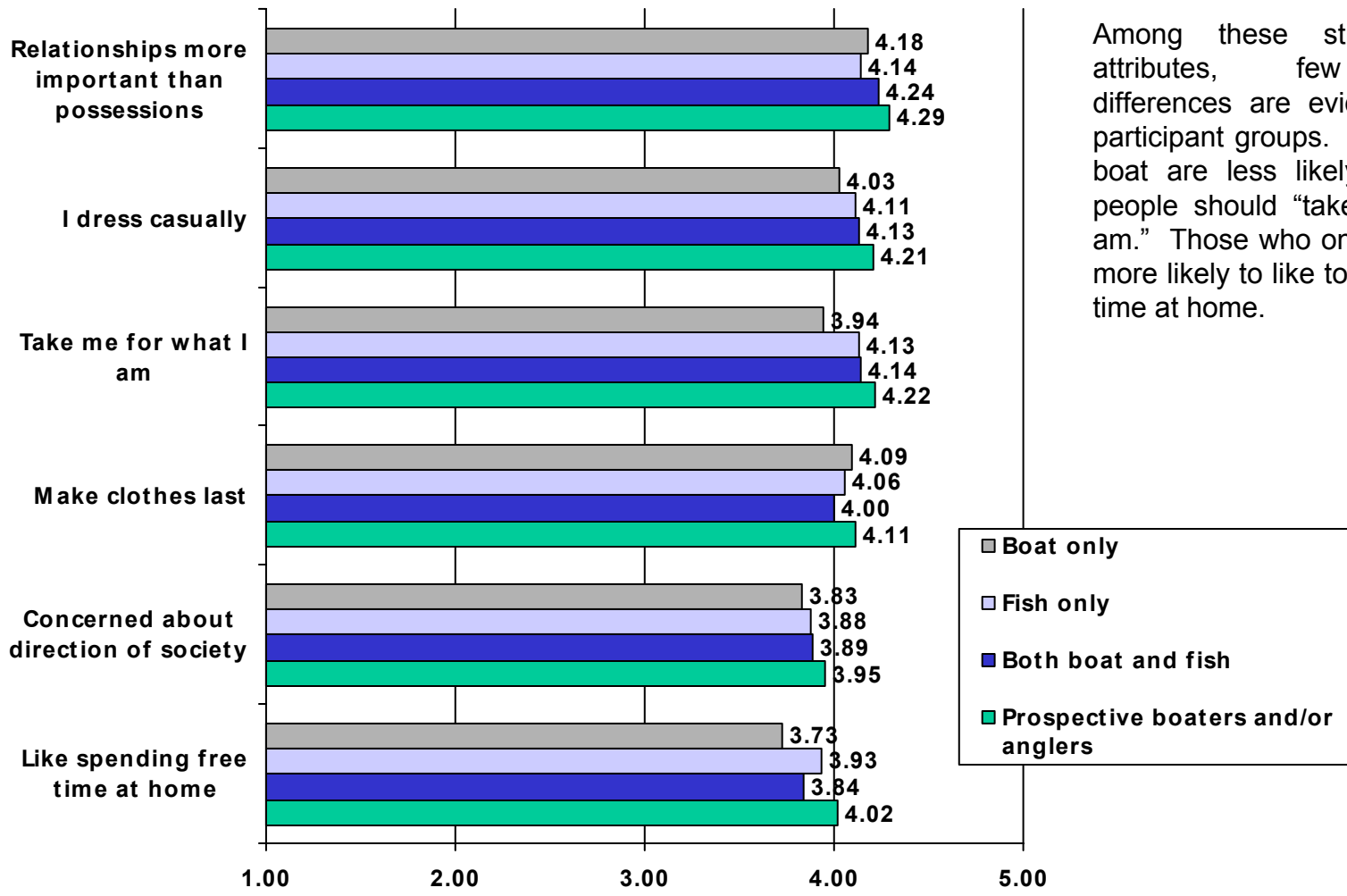
- Total Sample -



Boating and fishing participants and prospects do not believe that they are easily swayed by the opinions of others, that they can buy more than they can afford with a credit card, or prefer alternative medicines. They are not particularly concerned that their car stands out.

Mean score on a 5-point scale where the higher the score the more the characteristic describes the respondent.

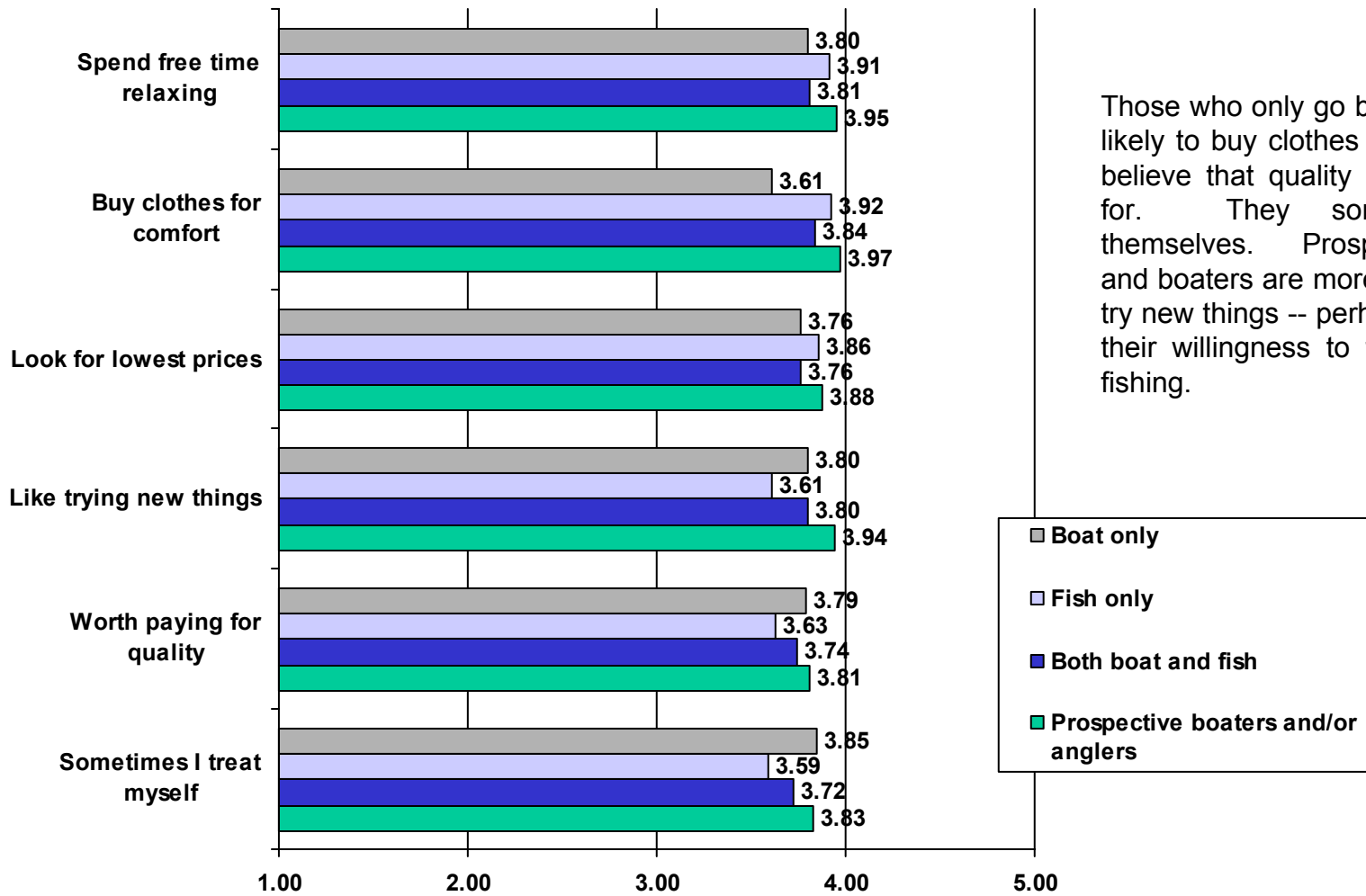
Lifestyle Profile



Among these stronger lifestyle attributes, few meaningful differences are evident across the participant groups. Those who only boat are less likely to agree that people should “take me for what I am.” Those who only go fishing are more likely to like to spend their free time at home.

Mean score on a 5-point scale where the higher the score the more the characteristic describes the respondent.

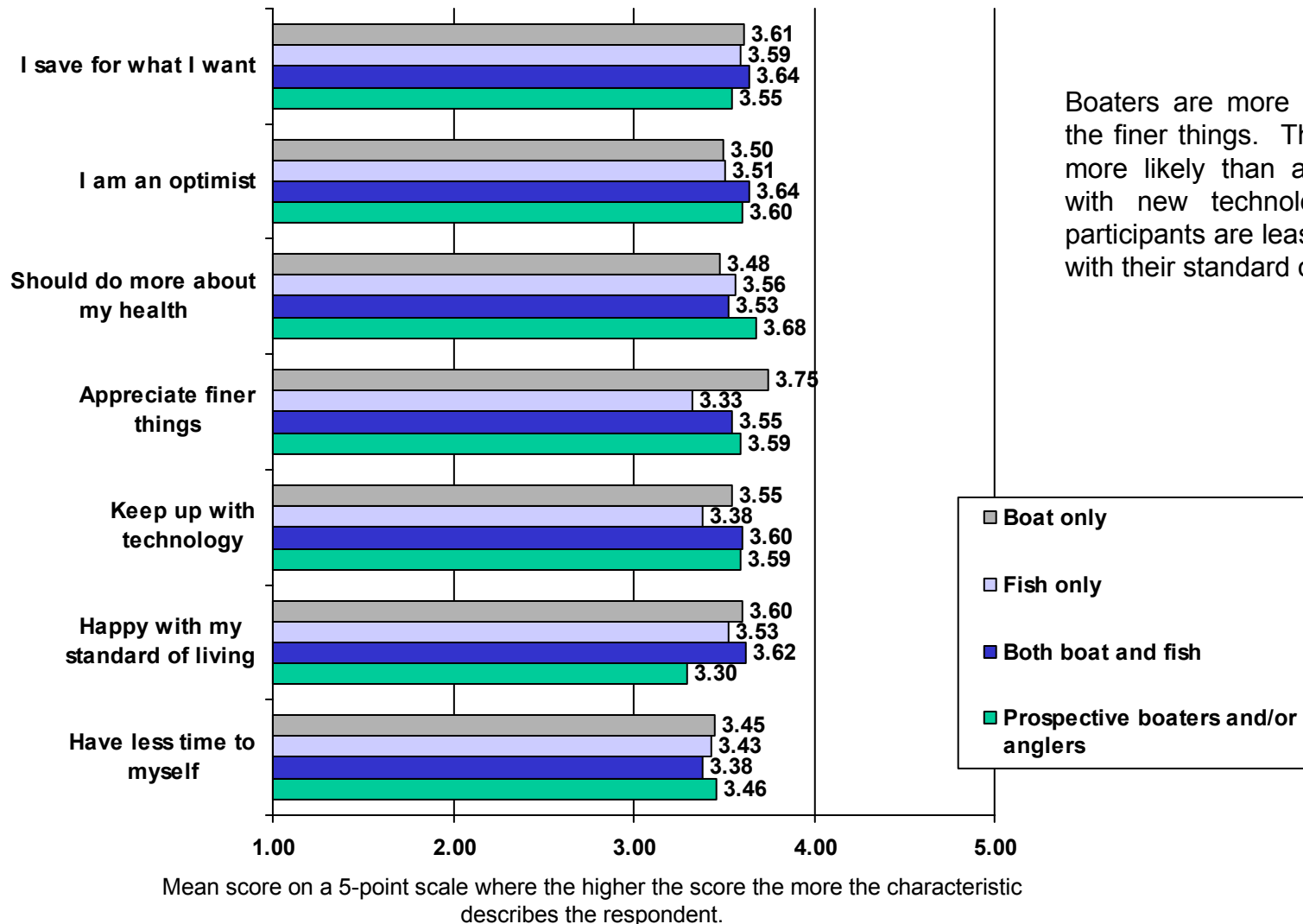
Lifestyle Profile (con't)



Those who only go boating are least likely to buy clothes for comfort and believe that quality is worth paying for. They sometimes treat themselves. Prospective anglers and boaters are more likely to like to try new things -- perhaps reflected in their willingness to try boating and fishing.

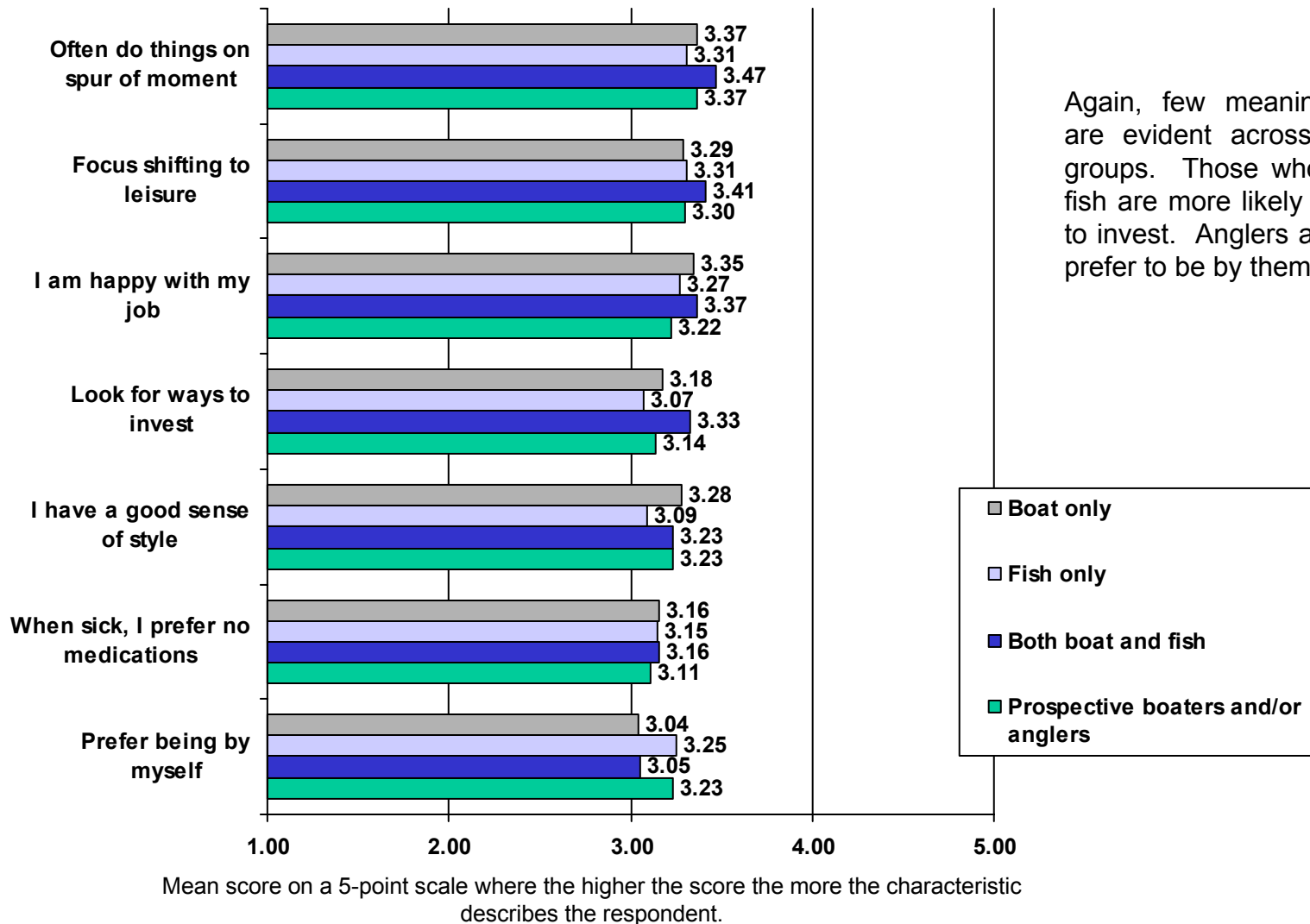
Mean score on a 5-point scale where the higher the score the more the characteristic describes the respondent.

Lifestyle Profile (con't)



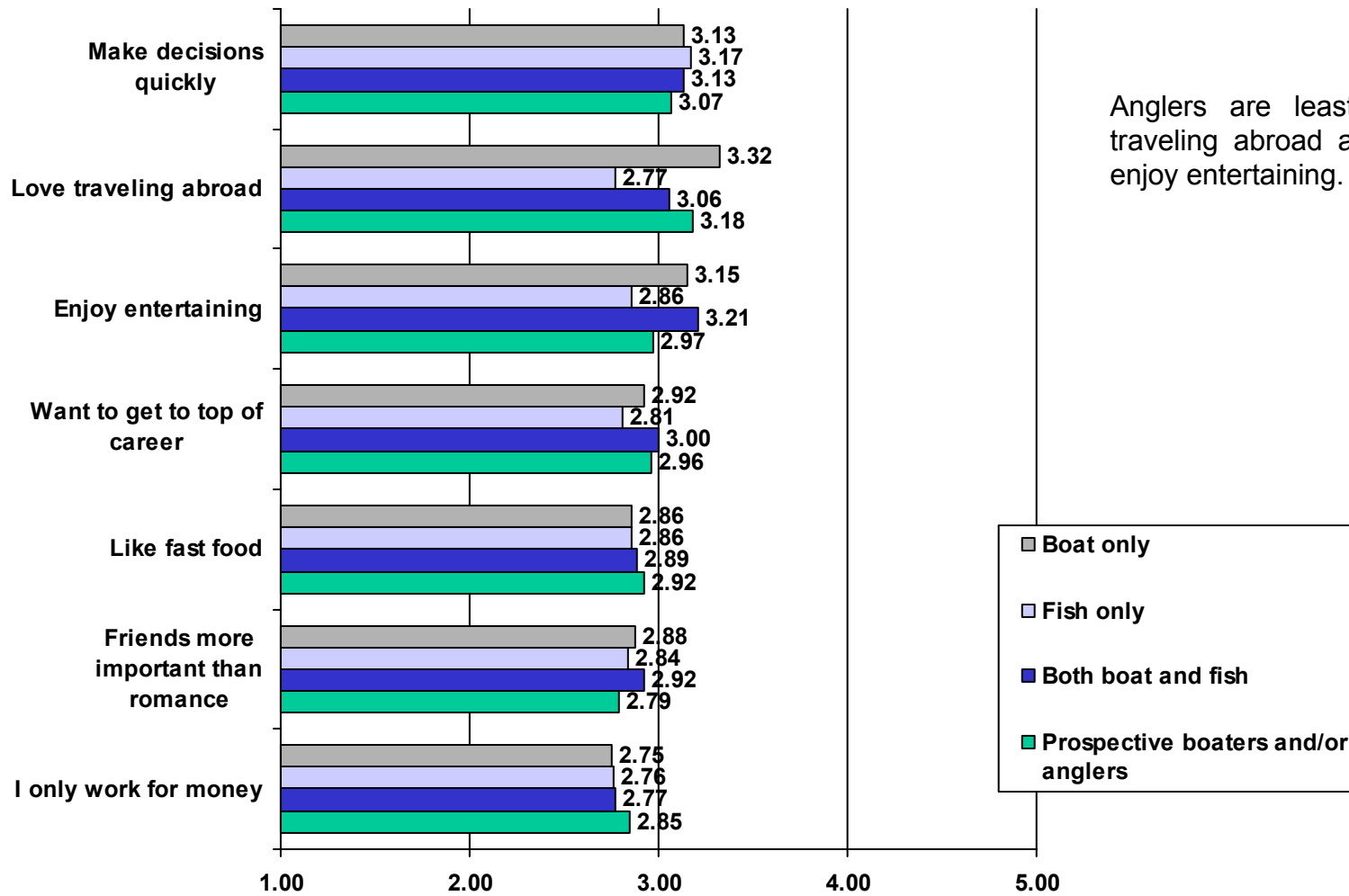
Boaters are more likely to appreciate the finer things. They also tend to be more likely than anglers to keep up with new technology. Prospective participants are least likely to be happy with their standard of living.

Lifestyle Profile (con't)



Again, few meaningful differences are evident across the participant groups. Those who both boat and fish are more likely to look for ways to invest. Anglers are more likely to prefer to be by themselves.

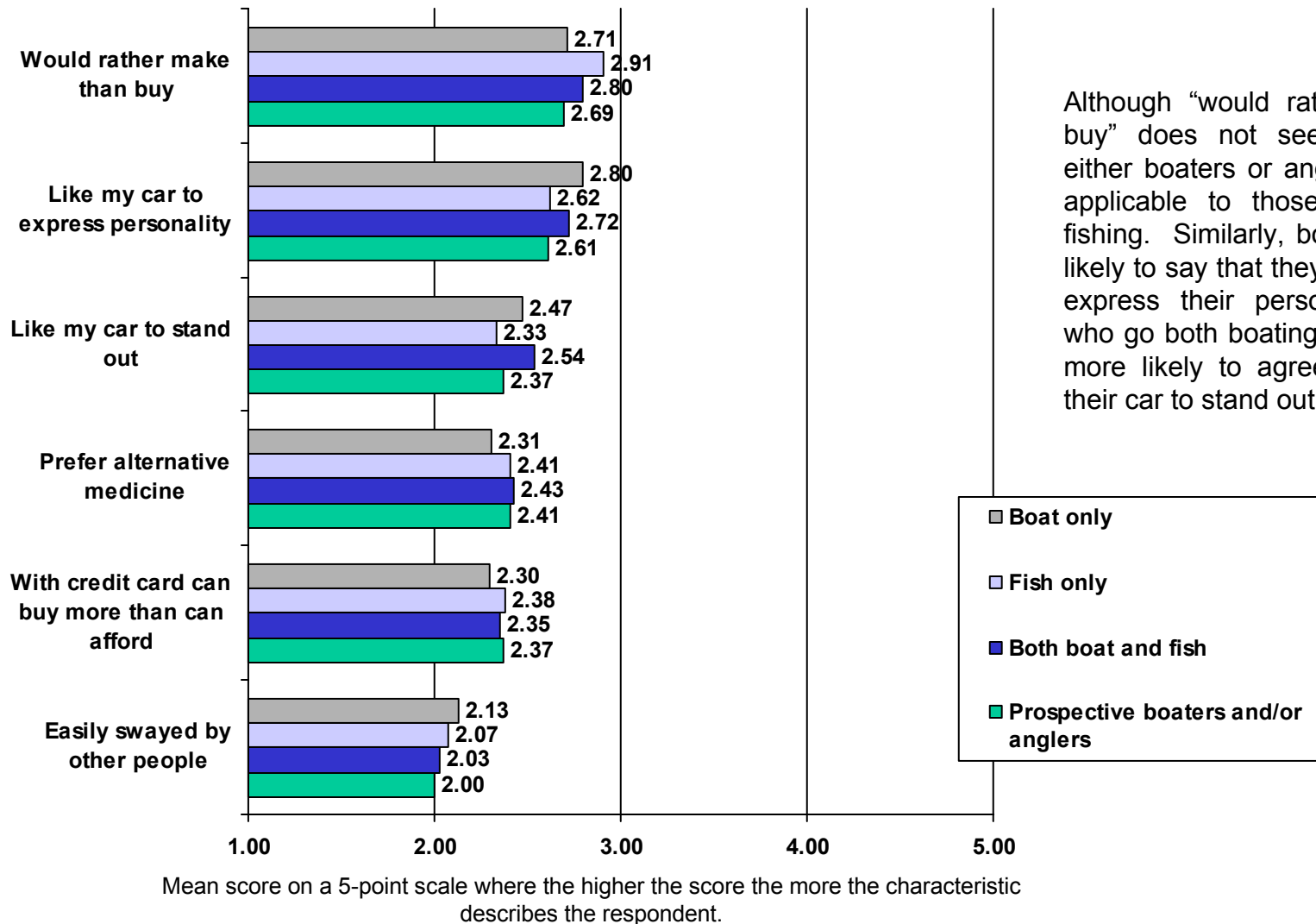
Lifestyle Profile (con't)



Anglers are least likely to enjoy traveling abroad and least likely to enjoy entertaining.

Mean score on a 5-point scale where the higher the score the more the characteristic describes the respondent.

Lifestyle Profile (con't)



Although “would rather make than buy” does not seem to describe either boaters or anglers, it is more applicable to those who only go fishing. Similarly, boaters are more likely to say that they like their car to express their personality. Those who go both boating and fishing are more likely to agree that they like their car to stand out.

Segmentation Analysis

Segmentation Analysis

Market segmentation allows us to differentiate the market into more or less homogeneous groups. These groups often tend to respond differently to marketing strategies and messages. Segmentation analysis enables the marketer to target a specific marketing mix to each segment, making marketing easier, more efficient and more successful.

One of the purposes of this research is the identification of different segments of active and prospective boaters and anglers. This section of the report identifies and describes the segments identified.

The segmentation analysis was performed using a form of cluster analysis. Cluster analysis was performed on the importance respondents place on specific attributes in their selection of leisure and recreational activities. In this way, only one segmentation scheme is necessary (rather than a separate segmentation for boaters and another for anglers).

Segmentation Analysis

In preparation for the clustering procedure, responses were normalized such that ratings for each respondent were expressed as deviations from the mean of all ratings given by that respondent. This procedure controls for “high raters” and “low raters.” Attempts at segmentation can often yield groups that are differentiated only by the magnitude, not the pattern, of their responses. As such, a cluster solution can include a group that rates everything highly, and another that rates everything lowly – a classification scheme that may be of little value. Normalization assumes that differences in magnitude without differences in pattern are a function of variations in personal disposition and not a result of true differences of opinion with respect to the subject at hand.

In addition, a factor analysis was conducted prior to the cluster analysis. Factor analysis is a data reduction technique that allows us to reduce a large number of attributes (such as the 29 attributes respondents rated on a 5-point scale in terms of their importance for recreational and leisure activities) to a smaller, more efficient number. Factor analysis identifies attributes that tap into the same underlying dimensions. Attributes that group together in this way can be combined into one composite attribute and used in the cluster analysis. This makes for a more efficient analysis of the data.

Segmentation Analysis

Segments of recreational boaters and anglers were identified based on what is important to them for participating in their favorite recreational and leisure activity. These segments were identified using the k-means clustering technique. This procedure groups respondents such that differences in opinion within groups are minimized and differences between groups are maximized. Running means were used because clustering is updated at each iteration. This process results in clear, consistent segments that can be analyzed, described and understood.

The clustering procedure analyzed respondents' answers to the following question:

Listed below are some things that you might enjoy about your favorite recreational or leisure activity. Please indicate how important each of these things is for your enjoyment of your favorite recreational or leisure activity. Use a scale of 1 to 5 for your answers, where "1" means that the item is "not very important" and "5" means that it is "very important."

The list included such things as "lets me spend time with my family" and "is exhilarating." For a complete list of the attributes, please see question 11 on the appended questionnaire.

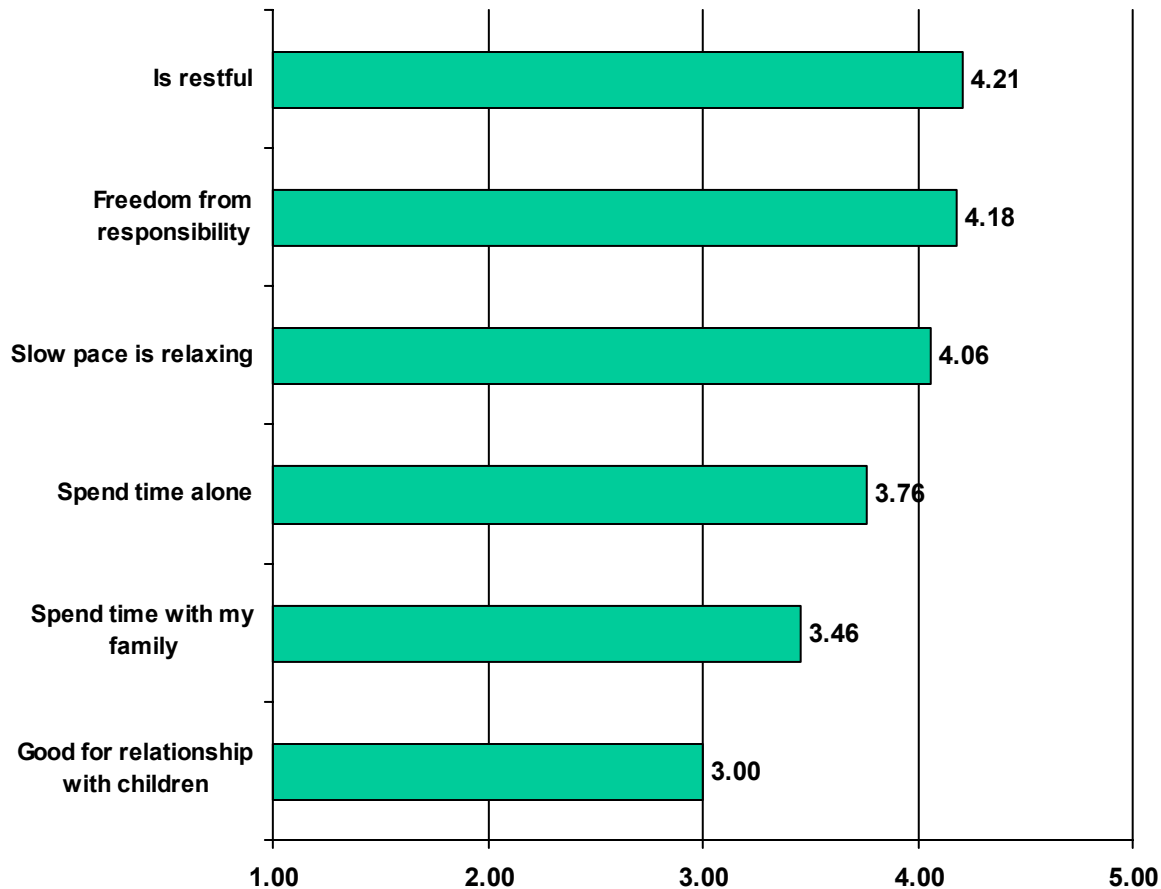
This segmentation analysis identified four boating and fishing segments. Based on the characteristics that identify these groups, the segments have been named:

Leisure Seekers
Thoughtful Loners
Family Folk
Thrill Seekers

These segments are analyzed and described on the pages that follow.

Importance of Specific Attributes for Favorite Recreational or Leisure Activity

- Leisure Seekers -

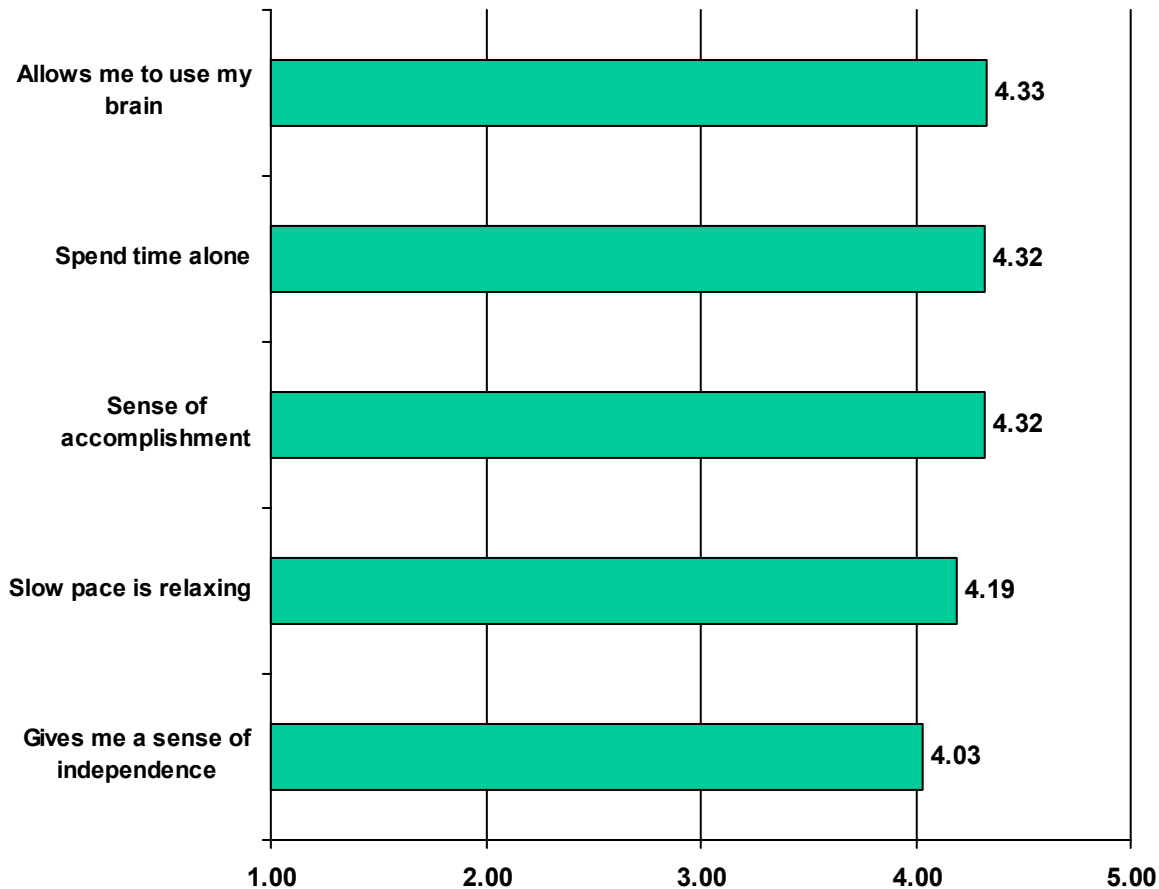


Mean score on a 5-point scale where the higher the score the more important the attribute.

Leisure Seekers place a premium on getting rest and relaxation from their recreational activities. It is also important to them that they are free from responsibilities. They are not especially concerned about who their company is for their leisure activities – alone, with family or with friends is fine with them. They are the least likely of the four segments to value recreational activities because they let them spend time with their children.

Importance of Specific Attributes for Favorite Recreational or Leisure Activity

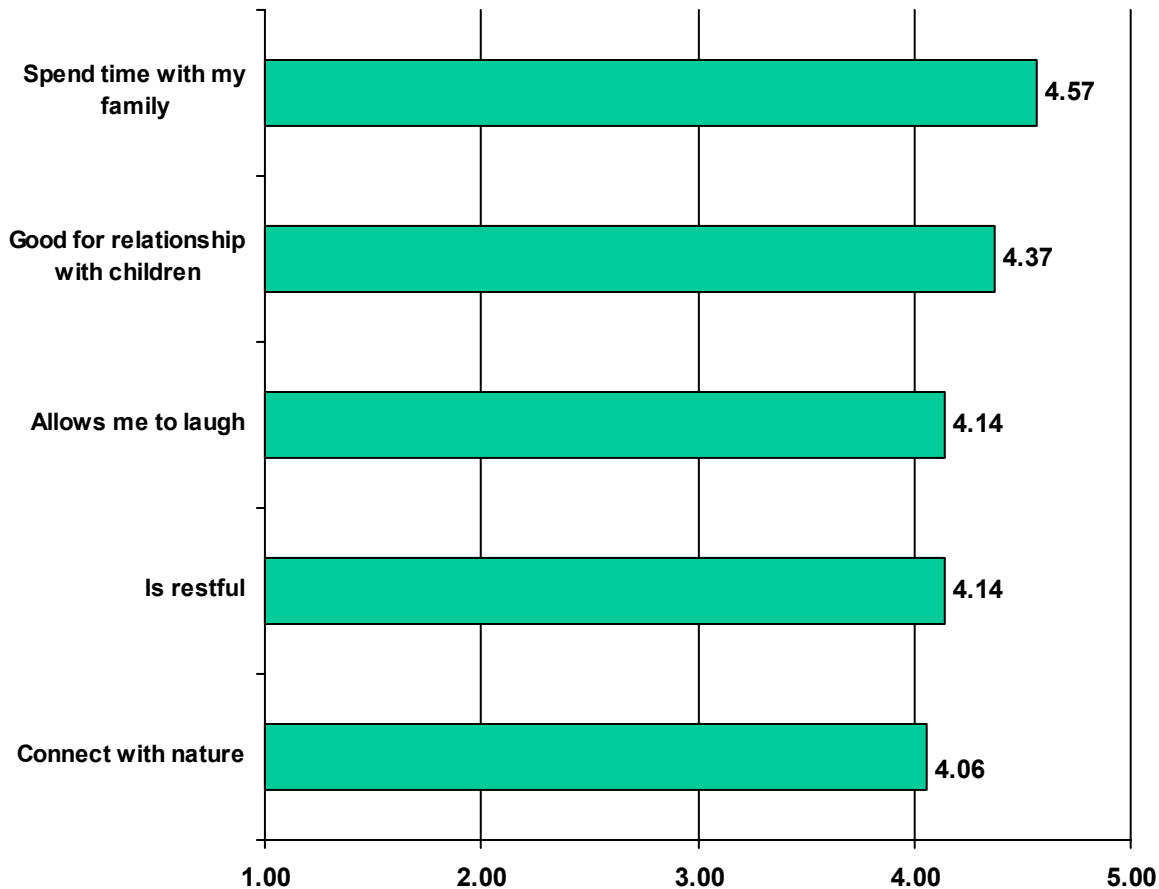
- Thoughtful Loners -



Mean score on a 5-point scale where the higher the score the more important the attribute.

Like Leisure Seekers, Thoughtful Loners enjoy activities that are slow, relaxing and restful. Unlike Leisure Seekers, Thoughtful Loners enjoy leisure activities that provide more than simply rest. They seek a sense of accomplishment from recreation through using their brains and gaining or enhancing skills. They get a sense of independence from their favorite activities – which they prefer to do alone.

Importance of Specific Attributes for Favorite Recreational or Leisure Activity - Family Folk -

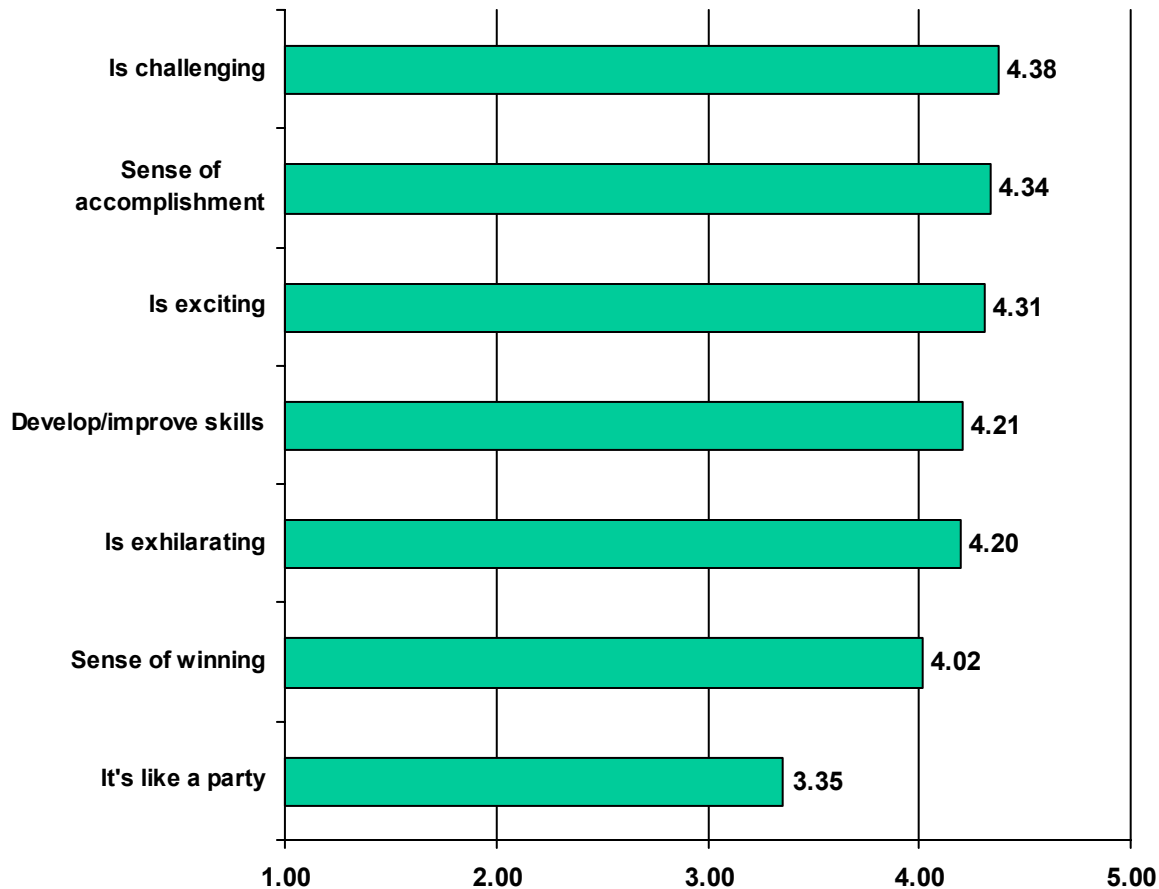


Spending time with family and children is the primary criterion for recreational activities among Family Folk. Other criteria that appeal to this segment include activities that are restful and allow laughter and a connection to nature.

Mean score on a 5-point scale where the higher the score the more important the attribute.

Importance of Specific Attributes for Favorite Recreational or Leisure Activity

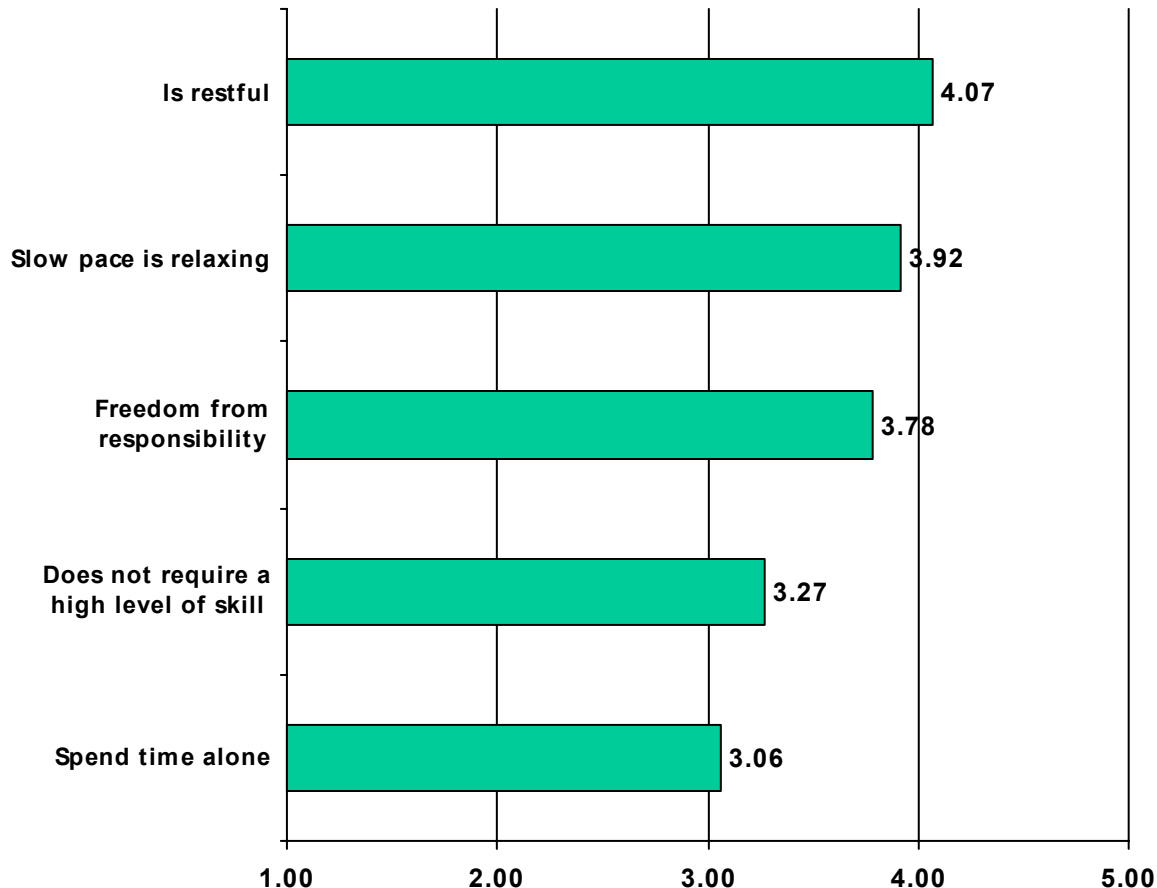
- Thrill Seekers -



Mean score on a 5-point scale where the higher the score the more important the attribute.

Thrill Seekers like activities that get their adrenaline flowing. They like activities that are challenging, exhilarating and exciting. They do not want slow paced recreational activities, and they do not enjoy recreation alone. Thrill Seekers are the most likely of the clusters to say that they enjoy recreational activities that are like a party.

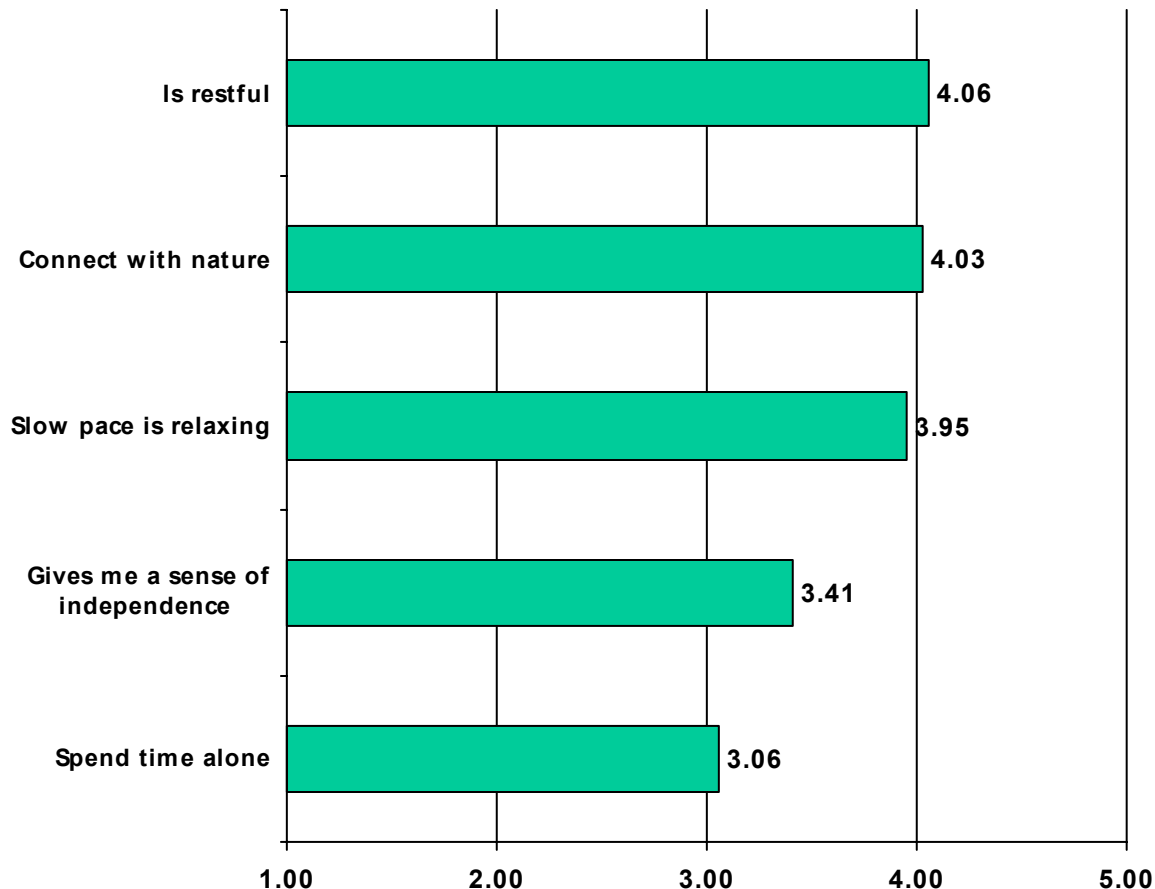
Importance of Specific Attributes for Enjoyment of Boating - Leisure Seekers -



Mean score on a 5-point scale where the higher the score the more important the attribute.

Recreational boating provides the benefits that Leisure Seekers value in recreational and leisure activities. They find it restful and relaxing, and it frees them from responsibility. They view boating as not requiring a high level of skill – also a form of freedom. They appreciate that it allows them to spend time alone – another characteristic of this segment. Being alone frees them from the responsibilities of social interaction.

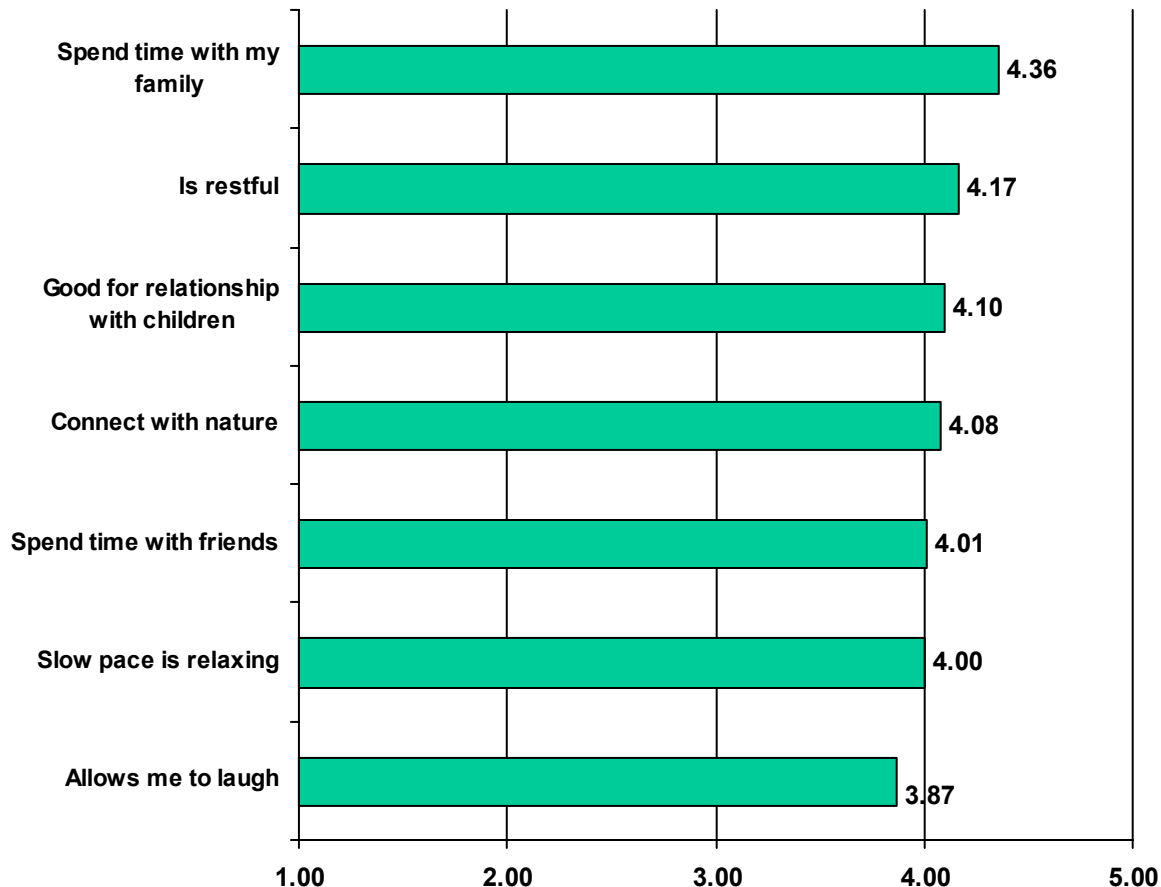
Importance of Specific Attributes for Enjoyment of Boating - Thoughtful Loners -



Mean score on a 5-point scale where the higher the score the more important the attribute.

Thoughtful Loners like to boat because it is restful and relaxing. They also appreciate the connection with nature they experience in boating. They can participate alone and feel a sense of independence. However, certain other attributes that this segment values do not characterize their experiences of boating: a sense of accomplishment and the opportunity to use their brains. While they do value the opportunity to go boating alone, this rating is much lower than would be expected if spending time alone truly characterized their boating experiences. In comparison to the other segments, Thoughtful Loners place the least value on spending time with friends while boating.

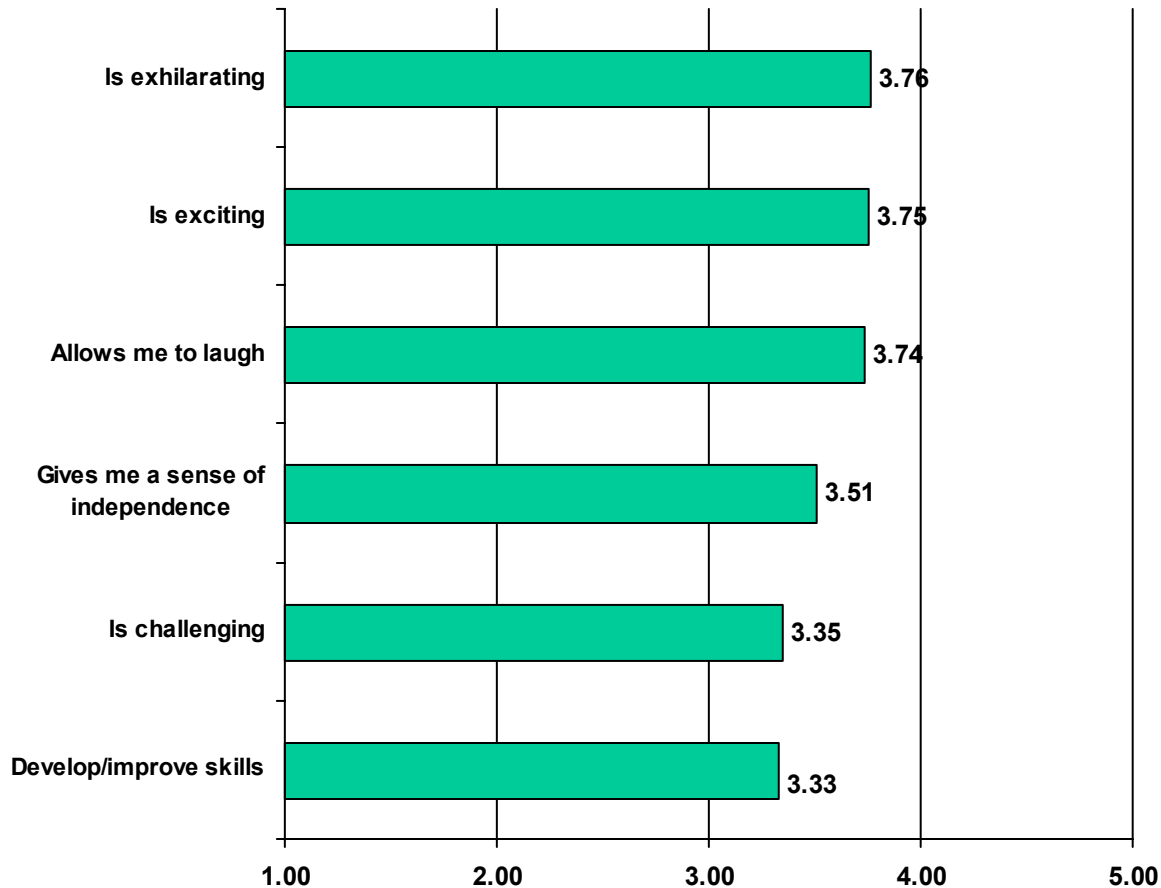
Importance of Specific Attributes for Enjoyment of Boating - Family Folk -



Mean score on a 5-point scale where the higher the score the more important the attribute.

Family Folk are a natural fit for boating in that it provides the benefits they seek in recreational and leisure activities. They value it because it lets them spend time with their family and is good for their relationship with their children. They appreciate its restful quality and that it can be experienced at a slow, relaxing pace. They are sensitive to its connection with nature, and they like that it allows them to laugh.

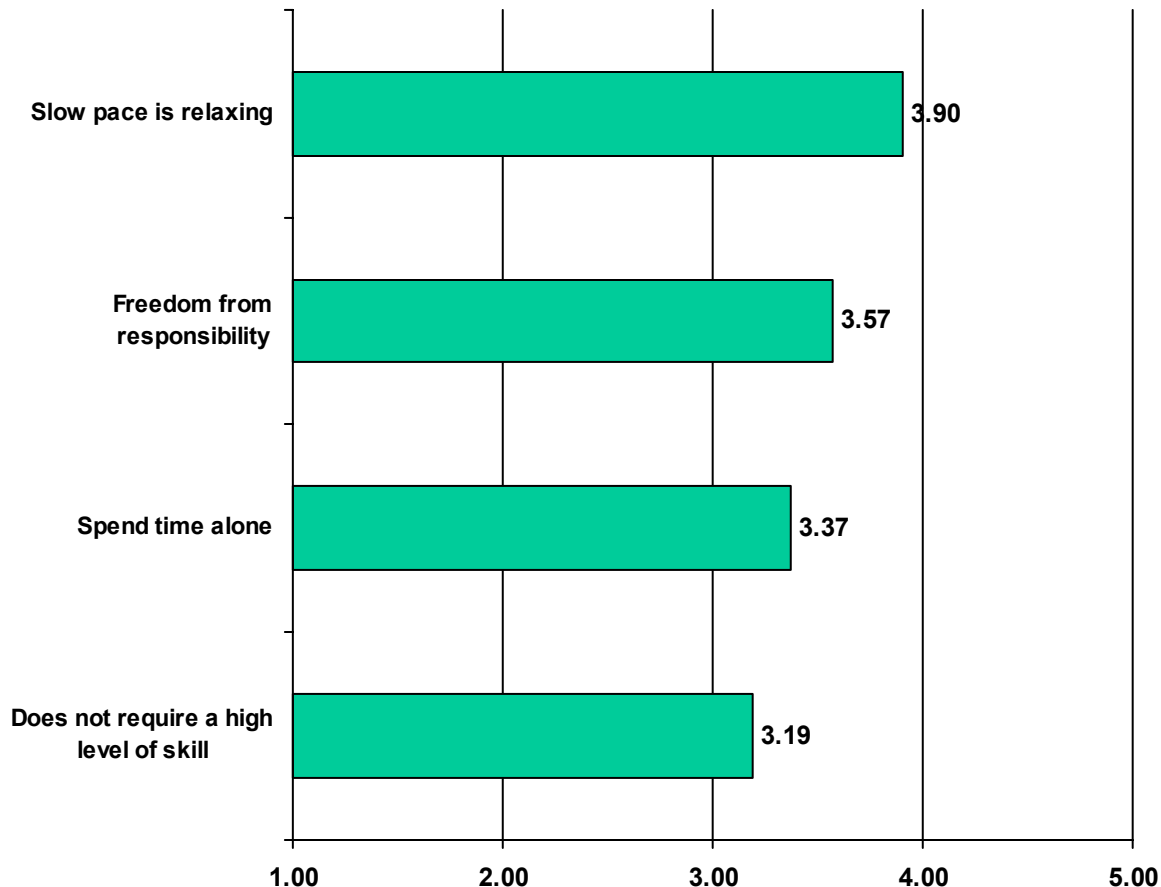
Importance of Specific Attributes for Enjoyment of Boating - Thrill Seekers -



Mean score on a 5-point scale where the higher the score the more important the attribute.

The adrenaline-driven Thrill Seekers like boating because it provides experiences that they value – exhilaration, excitement, challenge and a sense of independence. They also appreciate the fun (laughter) of boating and the opportunity to develop and improve their skills.

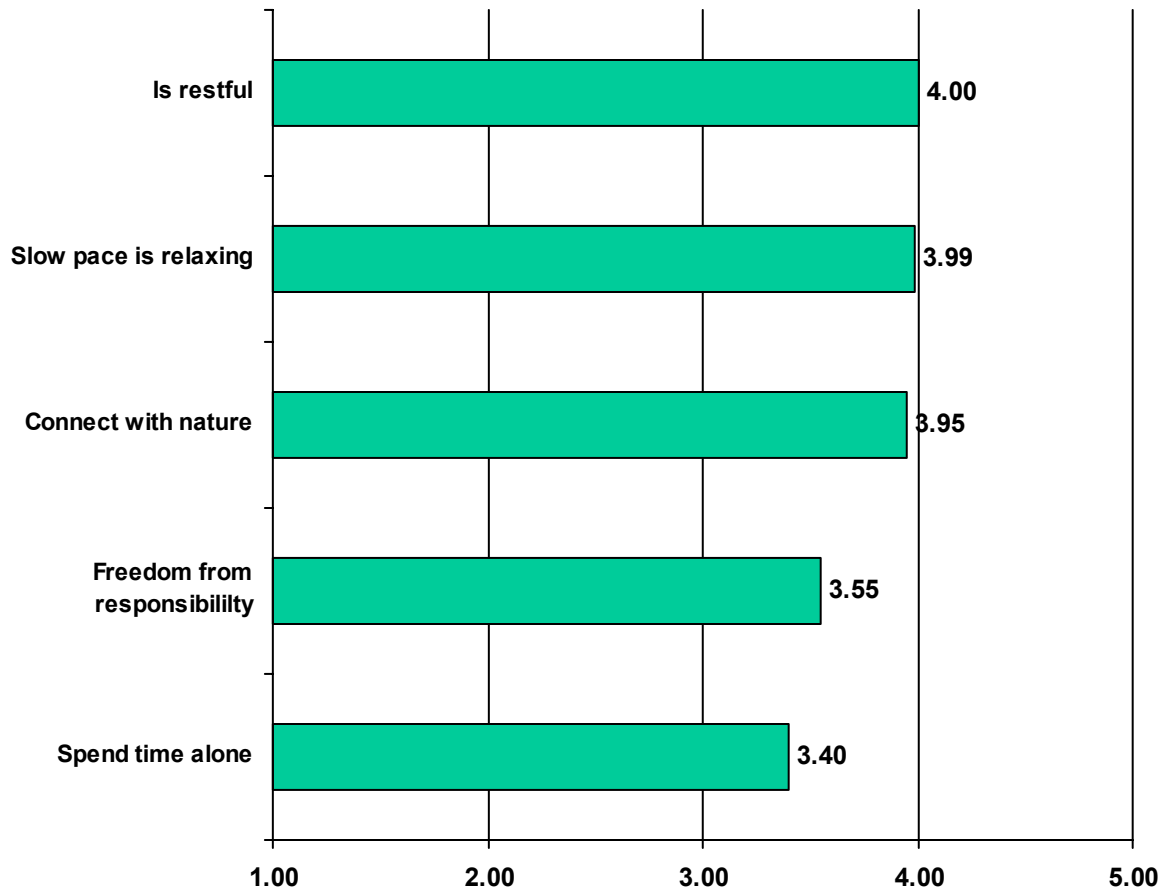
Importance of Specific Attributes for Enjoyment of Fishing - Leisure Seekers -



Mean score on a 5-point scale where the higher the score the more important the attribute.

Through fishing, Leisure Seekers find the experiences they seek in recreational and leisure activities – relaxation and freedom from responsibility. It also allows them to escape and spend time alone. They also value the independence of not requiring a high level of skill. Recall that this group is least likely to value an activity because it is good for their relationship with their children. Consequently, they are less likely than other segments to value fishing as an opportunity to spend time with their children.

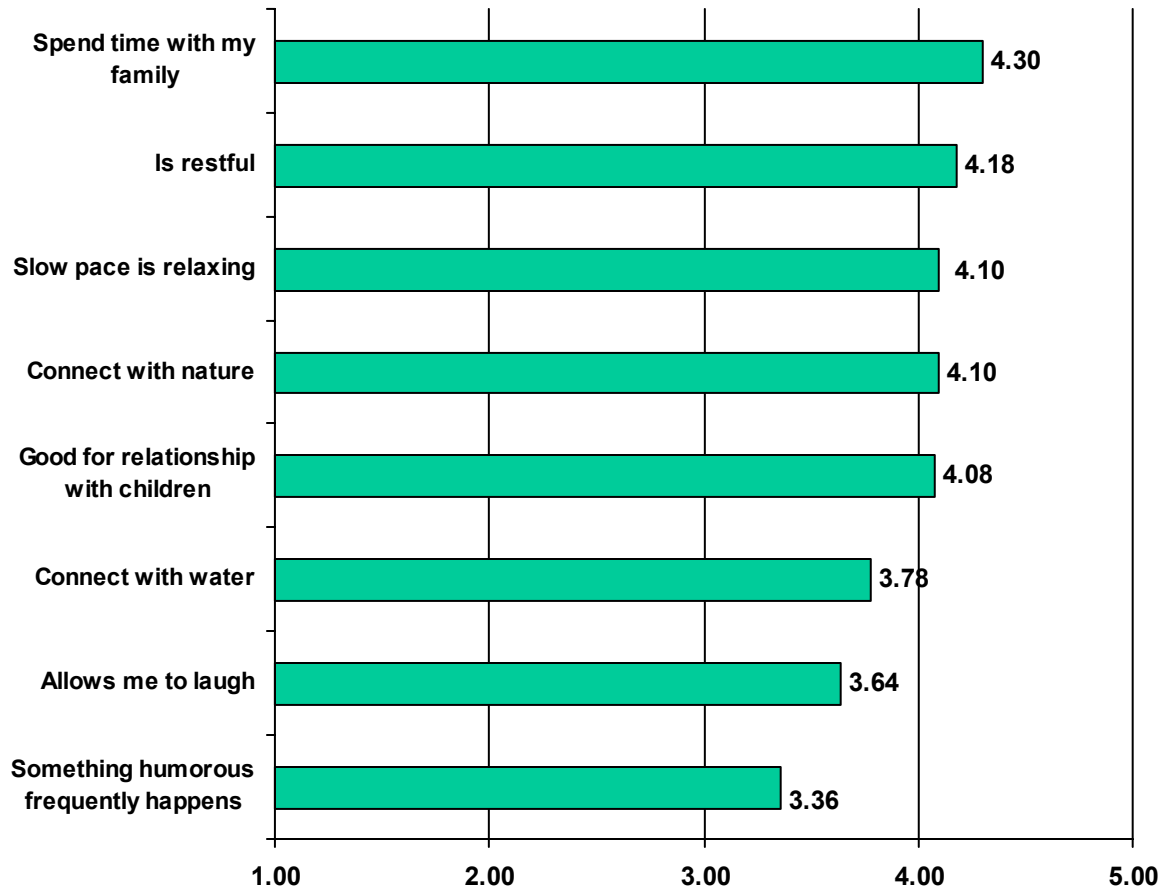
Importance of Specific Attributes for Enjoyment of Fishing - Thoughtful Loners -



Mean score on a 5-point scale where the higher the score the more important the attribute.

Fishing provides Thoughtful Loners with a slow paced, restful recreational experience – attributes that they value in leisure activities. It also provides the opportunity to spend time alone. It tends not to be perceived, however, as providing them a sense of accomplishment and the opportunity to use their brains. These are two attributes that this segment values in leisure and recreational activities.

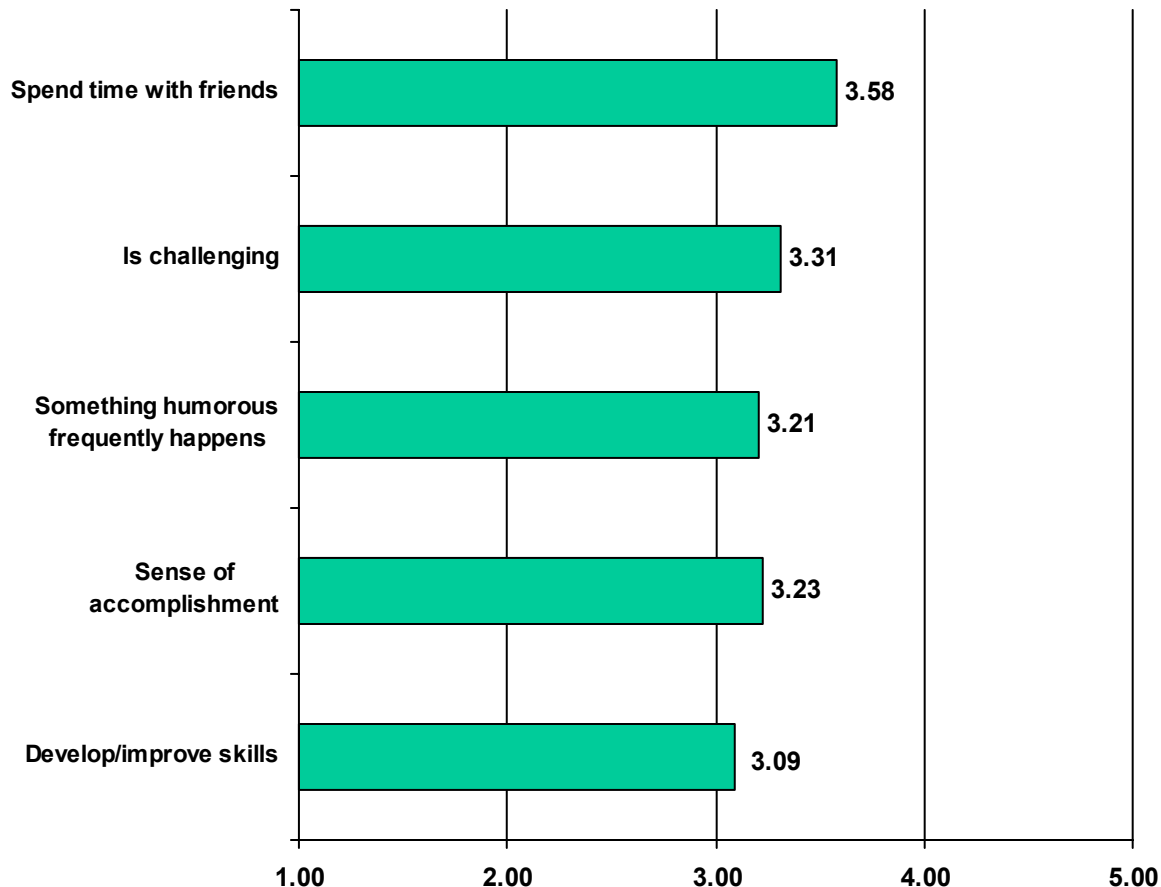
Importance of Specific Attributes for Enjoyment of Fishing - Family Folk -



Mean score on a 5-point scale where the higher the score the more important the attribute.

Family Folk appreciate fishing because it allows them to spend time with family, especially their children, and friends. These are attributes that are particularly important to this segment. Additionally, they value the connection to nature and water that fishing offers. And, they appreciate the sheer fun of laughter and humor of fishing.

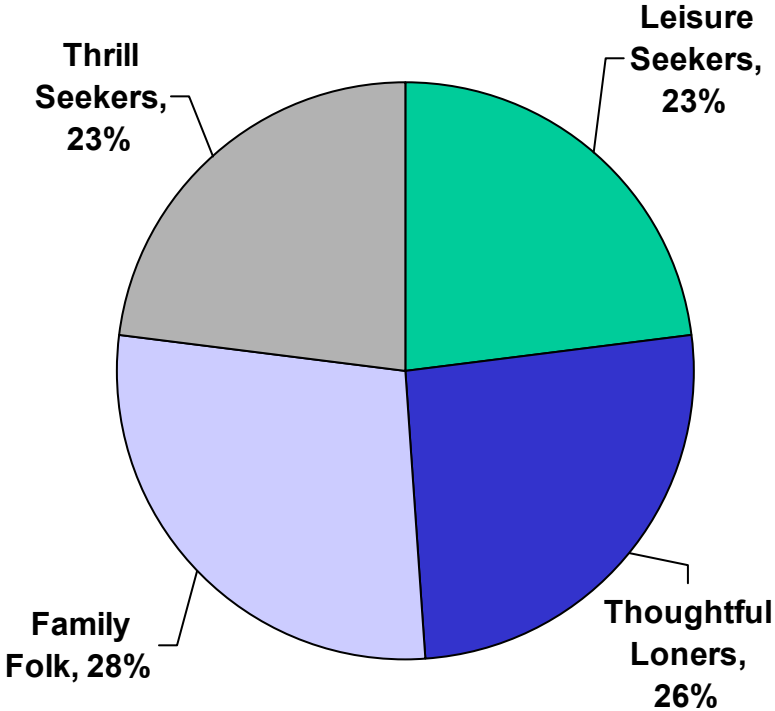
Importance of Specific Attributes for Enjoyment of Fishing - Thrill Seekers -



Mean score on a 5-point scale where the higher the score the more important the attribute.

The experience of fishing may be too low key for the adrenaline driven Thrill Seekers. Their scores on what is important to them in fishing tend to be lower than the scores of the other segments. Nevertheless, Thrill Seeking anglers appreciate that fishing allows them to have fun with their friends and that it is challenging, gives a sense of accomplishment and allows them to develop and improve their skills. The exhilaration and excitement that they seek seems to be lacking in fishing.

Size of Segments



Family Folk comprises the largest segment of boaters and anglers at 28%. Thoughtful Loners are second in size, with 26% of boaters and anglers. Both Thrill Seekers and Leisure Seekers represent 23% (each) of the boating and fishing population.

Self Description

Leisure Seekers

- Stressed
- Least likely to be energetic
- Least likely to be goal oriented
- Least likely to be adventurous

Thoughtful Loners

- Smart
- Don't mind getting dirty
- Goal oriented
- Patient
- Stressed

Family Folk

- Family oriented
- Like the outdoors
- Don't mind getting dirty
- Outgoing
- Patient

Thrill Seekers

- Adventurous
- Social
- Outgoing
- Goal oriented
- Energetic
- Enjoy parties
- Competitive
- Hip or cool

Lifestyle Profile

Leisure Seekers

- Spend free time relaxing
- Like fast food
- Look for lowest prices
- Least likely to try new things
- Least likely to believe it is worth paying for quality
- Least likely to be optimistic

Thoughtful Loners

- Dress casually
- Take me for what I am
- Make clothes last
- Concerned about direction of society
- Like spending free time at home
- Buy clothes for comfort
- Prefer being alone

Family Folk

- Relationships more important than possessions
- Concerned about direction of society
- Like spending free time at home
- Buy clothes for comfort
- Optimistic
- Happy with job

Thrill Seekers

- Like trying new things
- Optimistic
- Appreciate finer things
- Often do things on spur of moment
- Want to get to top of career
- Keep up with technology

Favorite Recreational or Leisure Activity

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Reading	16	35	10	6
Travel	14	4	18	7
Fishing	8	6	16	3
Movies	20	3	5	6
Sports	2	3	2	22
Cooking	2	6	5	6
Music	9	3	2	6
Camping	4	2	11	1
Gardening	3	9	4	2
Boating	2	<1	5	1

Fishing and boating are much more likely to be the favorite leisure or recreational activity among Family Folk than among the other segments. Sixteen percent (16%) of Family Folk report that their favorite leisure / recreational activity is fishing. Five percent (5%) report that their favorite is boating.

Thoughtful Loners (35%) are especially likely to list reading as their favorite activity – a solitary experience.

Leisure Seekers (20%) often escape to the movies for relaxation. Thrill seekers (22%) like sports.

In addition to boating and fishing, only most frequent answers shown.

Boating and Fishing Participation

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>	
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	
<u>Boating</u>					
Avid	8	7	15	9	Different levels of boating and fishing participation are scattered across all of the segments.
Semi-avid	14	9	14	13	
Occasional	47	50	43	45	
Prospective	23	24	21	22	
Lapsed	8	9	7	10	
<u>Fishing</u>					
Avid	15	13	24	14	Family Folk are most likely to be avid boaters (15%, compared to 8% of the Leisure Seekers, 7% of the Thoughtful Loners and 9% of the Thrill Seekers). Thoughtful Loners are least likely of all the segments to be avid or semi-avid boaters.
Semi-avid	15	17	22	19	
Occasional	47	45	37	42	
Prospective	10	13	8	15	
Lapsed	14	13	8	10	

Based to total qualified respondents for each activity (boating and fishing).

Boating Level of Participation

	<u>Avid</u> %	<u>Semi-Avid</u> %	<u>Occasional</u> %	<u>Prospective (Lapsed)</u> %	<u>Prospective (Never participated)</u> %
Leisure Seekers	19	26	24	24	25
Thoughtful Loners	17	17	27	26	26
Family Folk	44	32	27	24	27
Thrill Seekers	20	24	22	26	22

All four segments are found at all levels of boating participation. However, a fairly large proportion of avid and semi-avid boaters are Family Folk. Occasional and prospective boaters (both lapsed and those who have never boated) are about equally likely to be Leisure Seekers, Thoughtful Loners or Thrill Seekers.

Fishing Level of Participation

	<u>Avid</u> %	<u>Semi-Avid</u> %	<u>Occasional</u> %	<u>Prospective (Lapsed)</u> %	<u>Prospective (Never participated)</u> %
Leisure Seekers	20	18	25	21	25
Thoughtful Loners	20	24	28	39	29
Family Folk	42	35	25	21	21
Thrill Seekers	19	23	23	21	30

As is true for boating, all four segments are found at all levels of fishing participation. A fairly large proportion (42%) of avid anglers, however, are Family Folk. Although the proportion is smaller than for avids, Family Folk also comprise a large proportion of the semi-avid anglers (35%). More than one-third (39%) of the lapsed but prospective anglers are Thoughtful Loners. Almost one-third each of prospective anglers who have never been fishing are Thoughtful Loners (29%) or Thrill Seekers (30%).

Boating Companion

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Spouse / Sig Other	59	53	72	49
My children	33	36	17	10
Siblings	12	12	17	10
Parents	18	13	16	12
Grandparents	6	6	10	6
Grandchildren	6	6	10	6
Extended family	16	17	18	18
Friends	55	57	54	66
Other	4	4	2	5

Family Folk are most likely of the segments to go boating with their spouse or significant other (72%). Interestingly, though, only 17% go with their children. However, they do often (10%) go boating with their grandchildren.

Thrill Seekers are the most likely to go boating with friends (66%) and least likely to go boating with their spouse or significant other (49%) or with their children (10%).

Initiation of Boating Trips

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
I usually initiate	16	11	16	13
Someone else usually initiates	46	64	36	53
I initiate some of time	38	25	49	34

Thoughtful Loners are most likely of the segments to need to be “invited” to go boating in that someone else typically initiates their boating trips (64%). Family Folk are least likely (36%) to depend upon someone else to initiate the trip. Leisure Seekers (46%) and Thrill Seekers (53%) fall between these two extremes.

Likelihood of Going Boating If Had to Initiate the Trip

<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
27	37	32	38

Leisure Seekers (27%) are least likely to go boating if they have to initiate the trip.

Based to those who do not / would not initiate the trip.

Top Choices for Boating Information

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Friends	34	35	39	38
Internet	32	30	29	29
Magazines	29	24	28	27
Television	27	21	24	25
Boat show	21	19	23	27
Through participation	20	22	25	21
Newspapers	20	22	25	21
Radio	26	22	28	24
Sales associates	6	5	5	5
Organizations	5	3	4	6
Newsletters	2	3	2	4
Mail	3	3	3	3
Other	3	3	3	1
No need for information	37	45	38	38

Although Thoughtful Loners (45%) are most likely of the segments to indicate that they have no need for boating information, all segments tend to rely on the same sources for information.

Leisure Seekers are slightly more likely to rely on television (27%). Thrill Seekers tend more often to rely on boat shows (27%). Family Folk are more likely to rely on the radio (28%).

Fishing Companion

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Spouse / Sig Other	55	51	62	42
My children	31	38	52	36
Siblings	11	8	12	11
Parents	15	13	13	13
Grandparents	2	2	2	1
Grandchildren	7	6	11	7
Extended family	16	16	15	16
Friends	46	41	44	51
Other	5	7	3	3

The emphasis that Family Folk place on family-centered activities is particularly evident in their choice of fishing companions. This segment is particularly likely to go fishing with their spouses (62%) and their children (52%). They are much more likely to go fishing with their children than any of the other segments. Thrill Seekers are more likely to go fishing with friends (51%) than with children (36%) or spouses (42%). Leisure Seekers are least likely of any of the segments (31%) to go fishing with their children. Thoughtful Loners are least likely to go fishing with friends (41%).

Initiation of Fishing Trips

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
I usually initiate	21	18	23	17
Someone else usually initiates	46	47	32	46
I initiate some of time	34	34	45	37

Family Folk are most likely to be initiators (23%) of fishing trips. In contrast, nearly one-half of each of the other segments report that someone else usually initiates their fishing trips.

Likelihood of Going Fishing If Had to Initiate the Trip

<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
42	56	27	16

Based to those who do not / would not initiate the trip.

Thrill Seekers who do not initiate fishing trips would probably not go if they had to initiate the trip themselves. Only 16% said they would go fishing if they had to initiate the trip themselves. In contrast 56% of the Thoughtful Loners and 42% of the Leisure Seekers would go even if they had to initiate the trip. About one-fourth (27%) of the Family Folk would go if they had to initiate the trip.

Type of Fishing Tackle Currently Own

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Bait or plug casting	63	65	70	66
Spin fishing	48	54	62	50
Spin casting – push button	19	23	38	20
Fly fishing	25	23	38	20
Cane pole	13	23	17	14
None	10	10	7	7

The segments do not differ meaningfully in the types of fishing tackle that they own. Leisure Seekers tend to be slightly less likely to own bait or plug casting, spin fishing, spin casting – push button, or cane pole equipment. (Differences between Leisure Seekers and Family Folk are statistically significant at a 95% level of confidence. Differences between Leisure Seekers and Thoughtful Loners and Leisure Seekers and Thrill Seekers are not statistically significant.)

Annual Expenditure on Fishing Equipment

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>	
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	
< \$20	40	39	38	43	Family Folk and Leisure Seekers spend the most on fishing equipment. About one-fourth of those in each of these segments spend \$100 or more annually on fishing equipment.
\$20 - \$49	17	24	19	20	
\$50 - \$99	17	18	24	16	
\$100 - \$249	16	13	20	14	
\$250 - \$499	6	5	6	5	
\$500 or more	3	1	2	<1	

Top Choices for Fishing Information

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Friends	33	43	46	45
Through participation	21	26	35	28
Television	27	25	28	28
Magazines	21	20	22	21
Internet	17	23	19	18
Newspapers	18	16	18	17
Radio	12	8	8	8
Boat show	9	7	7	10
Sales associate	6	7	9	8
Organizations	2	2	3	4
Newsletters	3	2	2	1
Mail	4	3	3	3
Other	4	5	4	3
No need for information	46	44	37	41

All four segments tend to follow the same patterns in terms of sources of fishing information. Family Folk are, however, somewhat more likely to rely on their own participation (35%) for information than are the other groups. Leisure Seekers (46%) and Thoughtful Loners (44%) are most likely to say that they currently have no need for information about fishing.

Gender

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Male	53	59	47	41
Female	47	41	53	59

Thoughtful Loners are more likely to be men (59%) than women (41%). Thrill Seekers are more likely to be women (59%) than men (41%). Leisure Seekers are slightly more likely to be men (53%). Family Folk are slightly more likely to be women (53%).

Marital Status

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Single, never married	24	18	8	17
Single, previously married	11	17	9	15
Married	56	58	75	61
Living with someone	8	6	8	7

All segments tend to be married – especially Family Folk (75%) and Thrill Seekers (61%). Leisure Seekers are slightly more likely to be single, never married (24%) than are the other segments.

Household Size

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
1 person	16	18	7	17
2 people	37	36	38	39
3-5 people	43	41	50	41
More than 5 people	4	5	6	3

Family Folk are least likely to live in one-person households (7%) and most likely to live in households with three or more people (56%). The other three segments are about equally likely to live in one-person households.

Number of Children Under 18

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>	
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	
None	64	61	51	66	Family Folk are more likely to have children under 18 than are the other segments. Thrill Seekers are least likely to have children.
1 child	15	17	19	15	
2 children	14	15	19	13	
3 children	4	5	7	5	
4 children	1	2	2	1	
More than 4 children	2	<1	1	1	

Grandparents

**Leisure
Seekers**

**Thoughtful
Loners**

**Family
Folk**

**Thrill
Seekers**

%

%

%

%

Leisure Seekers are least likely to be grandparents (24%).

24

30

32

31

Number of Grandchildren Under 18

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
None	2	2	2	2
1 grandchild	25	13	20	17
2 grandchildren	22	21	18	25
3 grandchildren	15	16	16	17
4 grandchildren	11	13	13	11
5-10 grandchildren	21	32	27	25
More than 10 grandchildren	6	3	5	3

Leisure Seekers (25%) are most likely to have only one grandchild under 18. Thoughtful Loners (32%) are most likely to have 5-10 grandchildren under 18. About one-half of each segment have 2-4 grandchildren under age 18.

Based to those who are grandparents.

Level of Education

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Some high school	2	1	2	2
Completed high school	19	12	17	13
Trade / technical school	5	5	6	7
Some college	33	39	34	31
Completed college	28	27	27	27
Graduate studies	13	17	15	19

Thrill Seekers have the highest level of education. Nearly one-half (46%) have at least a college education. Leisure Seekers are in contrast to this extreme. More than one-fifth (21%) of this segment have a high school degree or less.

Employment Status

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
<u>Employed</u>	<u>72</u>	<u>65</u>	<u>71</u>	<u>71</u>
Full-time	58	47	55	51
Part-time	10	10	9	13
Full-time at home	3	4	4	4
Part-time at home	1	4	3	3
Not currently employed	10	13	7	6
Retired	12	15	15	18
Stay at home parent	5	8	7	5

All groups tend to be employed. Thoughtful Loners are the least likely to be employed (65%). Thirteen percent (13%) of this group report that they are not currently employed.

Occupation

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Professional	15	23	20	24
Exec/Adm/Mng.	33	25	25	21
Adm & Tech Support	29	28	28	29
Retail	8	9	10	9
Services	6	9	10	8
Construction	4	3	6	5
Agriculture	1	2	<1	1
Real estate	2	-	1	3

Leisure Seekers (15%) are least likely to be in professional positions and most likely (33%) to be in executive, administrative and management positions. Thrill Seekers (21%) are least likely to be in executive, administrative and management positions.

Income

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
< \$10,000	4	5	2	4
\$10,000 - \$34,999	27	24	22	21
\$35,000 - \$49,999	22	23	25	23
\$50,000 - \$74,999	20	23	23	23
\$75,000 - \$99,999	12	15	16	16
\$100,000 - \$149,999	10	7	9	9
\$150,000 - \$199,999	3	2	2	2
\$200,000 +	2	2	1	2

Income levels do not vary dramatically across the segments. All four segments are about equally likely to be in the higher income brackets – earning at least \$100,000 a year. However, both the Leisure Seekers (31%) and the Thoughtful Loners (29%) are more likely to earn less than \$35,000 than are either the Family Folk (24%) or the Thrill Seekers (25%). Note the fairly large drop off across all segments at the very highest income levels (i.e., \$150,000 and higher).

Currently Own Home

**Leisure
Seekers**

**Thoughtful
Loners**

**Family
Folk**

**Thrill
Seekers**

%

%

%

%

67

66

75

70

Consistent with their lower incomes, Leisure Seekers (67%) and Thoughtful Loners (66%) are least likely to own their own homes.

Length of Time at Current Residence

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>	
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	
Less than 1 year	14	14	12	15	There are no meaningful differences across the segments in regard to how long they have lived at their current residence.
1 – 4 years	30	29	29	32	
5 – 9 years	22	22	23	18	
10 + years	34	35	36	34	

Race / Ethnicity

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
White, non-Hispanic	75	83	84	79
African American	8	7	4	9
Hispanic	8	4	7	8
Asian	3	3	1	2
Native American	2	1	2	1
Other	3	1	3	2

Leisure Seekers (75%) are least likely to be White. In contrast, Family Folk (4%) are least likely to be African American. Thoughtful Loners are least likely to be Hispanic (4%).

Age

	<u>Leisure Seekers</u>	<u>Thoughtful Loners</u>	<u>Family Folk</u>	<u>Thrill Seekers</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
18 – 20	2	1	<1	2
21 – 25	8	5	3	5
26 – 30	9	11	7	11
31 – 35	14	11	14	13
36 – 40	14	10	15	11
41 – 50	25	28	28	20
51 – 60	19	21	19	20
Over 60	8	14	14	17

Family Folk are less likely to be younger than are the other segments. Only about 10% of this segment is 30 or younger, compared to 19% of the Leisure Seekers, 17% of the Thoughtful Loners, and 18% of the Thrill Seekers.