

# Conclusions and Implications

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**Conclusion:** Regardless of the recreational or leisure activities anglers and boaters participate in, they seek a release from stress in their recreational and leisure activities. The importance of release from stress is so high, it does not differentiate boaters and anglers, active, lapsed or prospective. Virtually all are looking for a release from stress. But, boaters and anglers seem to find this release from stress in different ways. For some, restful pursuits are important. For others, being energized and excited seem to be releases, and participants are attracted to specific recreational and leisure activities because the energy and excitement they experience are a sense of release. Sometimes, being able to laugh or feel a sense of accomplishment are reasons to participate and provide release from stress.

Boaters and anglers do differ to some extent in their specific needs regarding recreational and leisure activities. Boaters, for example, seem to be less attracted to restful and slow and relaxing recreational pursuits. Anglers are more attracted to family activities, particularly activities that allow them to focus on their relationships with their children.

**Implication:** All boaters and anglers will not respond positively to the same messages about boating and angling as recreational pursuits. While all look for a release from stress through these pursuits, their expectations and experiences vary. A range of images and messages will be necessary to attract participants to boating and fishing.

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**Conclusion:** Friends and family play important roles in boating and fishing as companions who also participate -- or maybe just go along -- in these activities. Both boaters and anglers most frequently go with spouses / significant others, their friends and their children. These relationships may also play an important role in attracting new participants. Prospective boaters and anglers are particularly likely to anticipate going with their spouses or significant others.

Boaters, in particular, seem to be attracted to the social nature of the activity. They often think of boating as and are attracted to the idea of spending time with friends and sharing an experience that is like a party.

**Implication:** Continue to explore messages that focus on the important role boating and fishing can play in developing and enhancing relationships. But, capture relationships that are more than parent/grandparent and child. Explore ways in which the relationship between husband and wife / significant other can be used to attract participants. In marketing messages, capture the joy of friendship that characterizes fishing and, especially, boating.

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**Conclusion:** Cruising is the most popular reason for going boating. More than 4 out of every 10 (42%) current or prospective boaters do or would go boating in order to go cruising. That is more than go boating to go fishing (34%) or to participate in water sports (13%) such as water skiing, tubing, kneeboarding, and para-sailing.

**Implication:** Not all boaters go boating for the same reasons or are attracted to the same type of boating experience. One image of boating may not be attractive to all active and prospective participants. Because, for example, the appeal of water sports is low, this image of boating may not be a way of attracting as many new participants as is cruising, a more popular boating experience. Explore ways to communicate the attraction of going cruising in a boat.

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**Conclusion:** Prospective boaters and anglers who have not gone boating or fishing in the last year do not seem to have strong negative experiences or perceptions that must be overcome. Instead, they seem simply to have no reason to participate – or no reason to overcome obstacles (i.e., no boat) to participation. When boaters are asked why they have not participated in the last year, they tend most often to report that they have no access to a boat or are just too busy. Similarly, anglers say they have just been too busy or are just not interested.

**Implication:** Marketers must give lapsed and prospective boaters and anglers a reason to participate. Bold and aggressive marketing, perhaps using gorilla tactics, may be necessary to spur lapsed and prospective participants to action.

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**Conclusion:** People participate in recreational boating and fishing for a variety of reasons. Often these are the same reasons for participating in other recreational and leisure activities – release from stress, rest and relaxation, opportunity to spend time with family and friends and to laugh and have fun. They are, however, more attracted to boating and fishing for the connection with nature and water that characterizes these activities than is true for other recreational and leisure activities.

In addition to these specific attributes, certain physical experiences and sensations are part of the overall experiences of boating and fishing that attract participants. For example, ideal boating and fishing scenarios often include the feeling of warm sunshine on the face, the feeling of the wind blowing against the face and through the hair and the sound of the waves lapping against the side of the boat.

**Implication:** A richness and depth from the physical and sensory nature of boating and fishing can be used to capture the ways boating and fishing connect participants with nature and with water. Explore how marketing can capture the sensory experiences that are an important part of boating and fishing.

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**Conclusion:** Boating is a more social activity than is fishing, and boaters are more likely than anglers to be viewed as social people. Boaters are more likely than anglers to describe themselves as social, outgoing and enjoying parties. And, the image of boaters is more social than is the image of anglers. Those who like to go boating are viewed as social, outgoing, adventurous and energetic. In contrast, anglers are viewed as patient, relaxed and not minding to get dirty. In spite of these differences, however, both boaters and anglers tend to be viewed as people who like the outdoors and are family oriented.

**Implication:** Boating is an activity that allows participants to meet their needs for social interaction and relationship building. This social interaction may or may not be based on family relationships. The fun and importance of the social nature of boating – as is characterized particularly by friendship – should provide an important foundation in the development of messages about boating.

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**Conclusion:** Current and prospective anglers and boaters can be differentiated into four distinct market segments. Leisure Seekers are differentiated by the premium they place on rest, relaxation and freedom from responsibilities that can be experienced through leisure and recreational activities. They can find these rewards in boating and fishing. They view and appreciate these activities as not requiring a high level of skill. They seek freedom and independence through boating and fishing and, consequently, are less likely than the other segments to want children involved. Thoughtful Loners prefer activities that are slow, relaxing and restful, but that also give them a sense of accomplishment and a chance to use their brains and develop skills. And, they often prefer to participate alone in leisure and recreational activities. Boating and fishing meet some, but not all, of the needs of Thoughtful Loners. Thoughtful Loners appreciate the slow paced, restful and relaxing experience that can characterize boating and fishing. However, boating does not seem to provide the opportunity for accomplishment and growth that is important to this group, and it is not generally something they think of as doing alone. While they do view fishing as something they can do alone, it, too, is not viewed as providing a sense of accomplishment and the chance to use their brains – both important leisure and recreational needs for this group. The third segment places utmost importance on the family and, consequently, is labeled “Family Folk.” Family Folk have a natural fit with the current image and perceived experiences of boating and fishing. These activities let them spend time with their families and children who are important to them – this alone is reason to participate. This group also values the link with nature that these activities provide. The fourth segment is named “Thrill Seekers” because these anglers and boaters pursue recreational and leisure activities that get their adrenaline pumping. They look for challenges, exhilaration and excitement. For these boaters, boating provides exhilaration, excitement and a sense of independence. The fit with fishing is, however, a harder stretch for Thrill Seekers. Thrill Seeking anglers appreciate that fishing allows them to have fun with their friends, is challenging, provides a sense of accomplishment and allows them to develop skills. The exhilaration and excitement that they seek, though, seem to be lacking in fishing.

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**Implication:** Family Folk are captured in current and recent recreational boating and fishing marketing and advertising in terms of the emphasis placed on family through *Water Works Wonders*. It may take some modification of the strategy to reach the other segments, however. Thrill Seekers, for example, need to recognize and appreciate some form of exhilaration and excitement through boating and fishing, such as catching a large, fighting fish, going into perilous water, or having an “adventure.” Thoughtful Loners could, potentially, be attracted to participate or to participate more in boating and fishing if they saw in it and experienced through it a challenge, a competitive environment, the opportunity to learn and enhance skills, or to use their brains. The most difficult segment to attract to boating and fishing or to motivate to increase their level of participation is the segment named “Leisure Seekers.” These individuals seem to have low levels of motivation. They are least likely to try new things and least likely to be optimistic. They want to spend free time doing things that are easy, require little effort and responsibility. An image and experience of boating and fishing as “free and easy” may be the strongest pull for participation for this group.

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**Conclusion:** All four segments are found in all levels of boating and fishing participation – from avid to prospectives who have not participated previously. However, the natural fit between these activities and Family Folk is evident. Family Folk are most likely to be avid boaters (15% compared to 8% of Leisure Seekers, 7% of Thoughtful Loners and 9% of Thrill Seekers). The fit between boating and/or fishing and some of the other segments may not be as obvious. Boating, for example, may not be particularly attractive to Thoughtful Loners. Thoughtful Loners are least likely of all the segments to be avid or semi-avid boaters. Family Folk is also the segment that is most likely to be avid or semi-avid anglers (46%).

**Implication:** The fit between each of the segments and boating or fishing is reflected in the fact that the segments are represented in all activity levels. The best fits – between Family Folk and fishing and between Family Folk and boating – have already occurred in that Family Folk already participate to a great extent in these activities. Thus, new converts may need to come from the other segments. It may be a real challenge to attract Thoughtful Loners to boating. Currently, Thoughtful Loners are not as attracted to boating (at least as avid or semi-avid participants) as are the other segments. It may simply mean that the preference for time alone is difficult to meet in boating. In terms of resource prioritization, targeting Thoughtful Loners for boating should be a lower priority.

To attract new anglers, marketing may need to move beyond Family Folk. Currently, nearly one-half (46%) of this segment already fishes on an avid or semi-avid basis. In terms of the distribution of segments across the different fishing participation levels, all segments offer opportunity to grow participation. Successful marketing would focus on the benefits (as indicated by attribute ratings) that have the greatest appeal for each of these groups.

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**Conclusion:** African Americans, Hispanics and Whites all tend to appreciate the same types of experiences in leisure and recreational activities, including boating and fishing. They seek and value rest and release from stress, fun and excitement. Nevertheless, the groups do seem to have different needs and preferences in terms of the rewards they want to experience in recreation and leisure pursuits. Hispanics are more likely to emphasize and value humor, fun, social and party-like activities. They also place greater emphasis on activities that allow them to connect with water than do either Whites or African Americans. African Americans value the opportunity for self-improvement in that they prefer leisure and recreational activities that offer a challenge and allow them to develop and improve skills. Both Hispanics and African Americans place greater importance than do Whites on leisure and recreational activities that give them a sense of power and are competitive and fast-paced.

**Implication:** Different marketing and marketing messages for Hispanics and for African Americans are needed to attract them to boating and fishing. While both groups may be attracted to positioning that emphasizes power, competition and a fast pace, African Americans will respond more favorably when these images are used to convey a sense of self-worth, self-improvement and personal growth. Hispanics need to view these activities as offering the opportunity to socialize and have fun.

Note: For a more detailed analysis of African American and Hispanic boaters and anglers, see the “Appendix” to this report.

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**Conclusion:** Hispanics would seem to appreciate particularly certain elements of the *Water Works Wonders* campaign. They tend to be more likely to appreciate the connection with water and nature and the emphasis on spending time with family and children. While African Americans also appreciate these elements, they have less appreciation for the connection to water and nature and the emphasis on family and children than do Hispanics.

**Implication:** In order to target the *Water Works Wonders* campaign to Hispanics, it needs to have a focus on excitement and fun within a social context. African Americans, however, seem inherently less attracted to this strategy. They require less “nature” and “water” and more emphasis on personal development.