



RECREATIONAL
BOATING & FISHING
FOUNDATION

MARKET
SEGMENTATION
PROFILE
EXECUTIVE SUMMARY

Research Objectives

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- Achieving significant gains in fishing and boating participation is going to require reaching new audiences with new messages that resonate with a population to whom angling and boating may not have been part of their youth. Accomplishing these goals requires identifying and targeting new high potential populations. In order to do so, a market segmentation study was undertaken to allow for the development of targeted marketing messages.
- Specifically, this research was designed to address the following objectives:

Research Objectives

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- Develop robust profiles of recreational boaters and anglers
- Identify market segments with highest potential for growth
- Explore attitudes and motivations of current audience
- Assess factors that influence participation rates over time
- Quantify representation of different segments
- Identify barriers to participation
- Forward actionable conclusions, recommendations & strategies

Methodology

□ **Survey Development**

- *Existing Research Review:* The first effort undertaken was a review of the existing research that had been conducted by RBFF. This provided context for the development of the segmentation research.
- *Qualitative Stakeholder Review:* Prior to developing the segmentation research details, qualitative one-on-one interviews were conducted with stakeholders who were drawn from the RBFF Board of Directors. A total of 13 qualitative discussions were conducted, with the focus of the interviews centering on the goals of the research effort from the stakeholder perspective.

□ **Quantitative Survey**

- The core element of this segmentation process consisted of a broad-based quantitative survey of the U.S. population. A total of 6,061 interviews were completed, utilizing both telephone and Internet methodologies to help assure representativeness. This total included more than 1,800 current anglers and 1,700 current boaters and more than 5,500 respondents who represent potential participants either in terms of current and past behavior or expressed interest in boating or fishing. The survey represented an inventory of motivations and behaviors for a selection of 33 leisure time activities, including three fishing and five boating activities. Each respondent was then asked a motivational battery of 30 potential drivers for up to three of the activities in which they engaged. Additionally other details of their participation were explored, including frequency, spending, with whom they tend to participate, and the age they first started. In addition to these rich profiles, lifestyle attitudes, barriers to participation among those who do not boat or fish, demographics, and geographics were collected.

Activity Participation

- It is helpful to consider the level of participation that was found in the 33 activities studied. Since a simple list of 33 activities may prove difficult to digest, one of the first steps taken was to perform a factor analysis on the level of participation in each of the activities. The result was a six-factor solution – with the boating and fishing activities falling in two of these groups.

Quiet Activities	Overall Participation
Gardening	39%
Wildlife viewing or bird watching	18%
Arts and crafts	31%
Reading for pleasure	63%
Visiting a state or national park	29%
Hiking	19%

Fitness Activities	Overall Participation
Exercising	47%
Running/jogging	18%
Walking for exercise	65%
Bicycling	19%
Team sports	9%
Swimming	35%

Outdoorsman Activities	Overall Participation
Hunting	7%
Fresh water fishing	15%
Target shooting	8%
Fly fishing	3%
Salt water fishing	5%
Camping	18%

Speed Activities	Overall Participation
Jet skiing or using a wave runner	4%
Water skiing/water sports	4%
Snow mobiling	2%
Canoeing or kayaking	7%
Motor boating	8%
Four-wheeling/off-roading	7%
Sailing	3%
Motorcycling	5%
Snow sports	6%

Individual Activities	Overall Participation
Outdoor adventure activities	13%
Tennis	7%
Golfing	10%
Indoor Activities	
Gambling	24%
Playing cards	44%
Bowling	22%

Boating and Fishing Participation

- While the focus of this research is upon the development of segments for marketing purposes, it can be helpful to review some of the details about specific fishing and boating activities. In part we have seen some of their characteristics in terms of those other activities with which they tend to be grouped – their crossover activities.
- Since the objective is to gain participation, it is helpful to review the motivators and behavior surrounding each of the boating and angling activities. This is not intended to provide new insights or to represent any kind of segmentation – rather it is only a review, of things already generally known, for context.

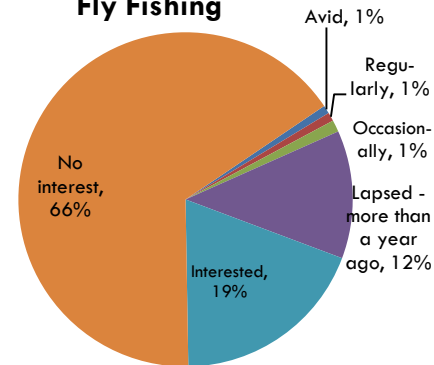
Fishing

Avid: Every chance you get
Regularly: Often
Occasionally: When I have an opportunity
Lapsed: You've done it, but it was over a year ago.
Interested: You haven't done it but would like to try sometime.
No interest: You've never done it and probably never will.

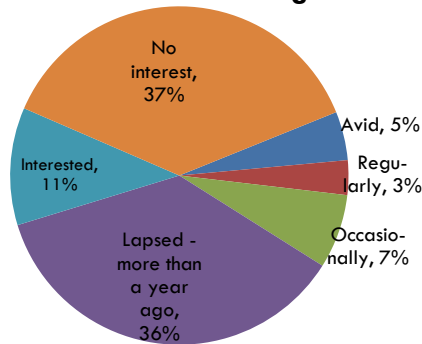
Fly Fishing

This is a small group of people, with only 3% reporting fly fishing in the past year. They participate on average about once a month, which is less frequently than many other fishing/boating activities. The appeal is a mix of relaxation and excitement, and fly fishing is less social than other options.

Fly Fishing



Fresh Water Fishing



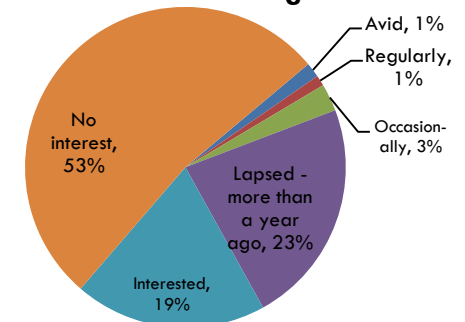
Fresh Water Fishing

This is the fishing or boating activity that is most prevalent, and has the highest overall potential. It is also the activity that people are most likely to do with their spouse, and the one that was started at the youngest age. The appeal is the excitement, fun and reward.

Salt Water Fishing

Salt water fishing appeals to those who like the outdoors and a bit of adventure. It is also fairly social, and increased participation is linked to family enjoyment and a desire to talk about the experience with others. Salt water fishing is also relaxing.

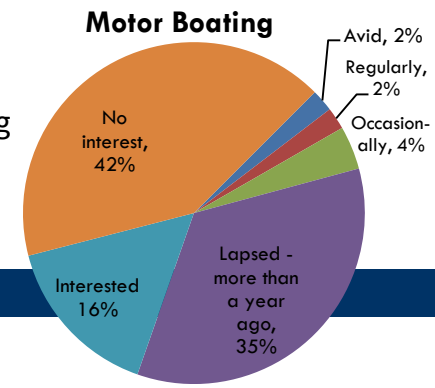
Salt Water Fishing



Boating

Motor Boating

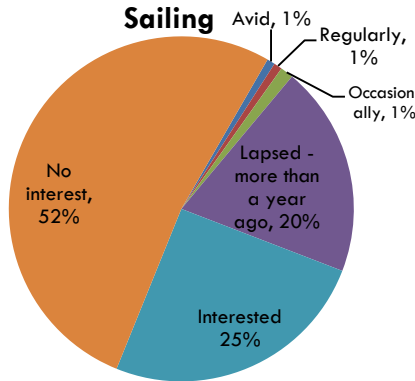
This activity has a strong family component. Being able to enjoy the outdoors and water while creating memories with family and children are important motivators. This activity has the largest group that is interested, but not recent participants.



Sailing

People who participate in sailing are looking for a combination of challenge and relaxation. Frequency of participation is fairly high, although this activity also attracts a fairly high percentage of dabblers.

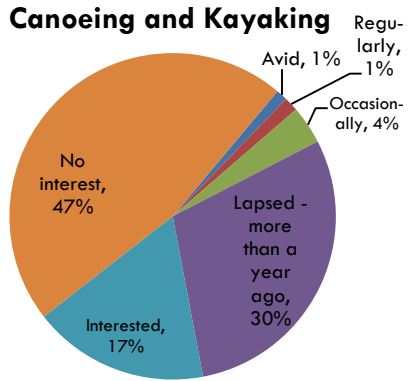
Sailing



Canoeing/Kayaking

The motivation for canoeing and kayaking is more focused on relaxation, although there is also a desire to get exercise. It is an activity with fairly large potential, although it is the boating/fishing activity with the lowest annual frequency.

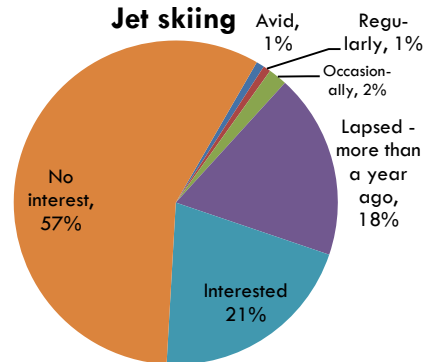
Canoeing and Kayaking



Jet Skiing

This activity is viewed as exciting and social. It has less potential than many other fishing/boating options. It is also an activity that has a lower level of frequency.

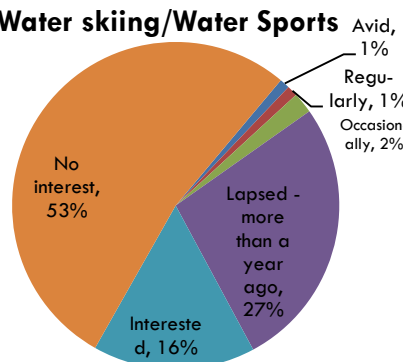
Jet skiing



Water Skiing/Water Sports

Water Skiing/Water Sports

Water sports are a social activity – a good way to spend time with family, children and friends. They also foster competition and exercise. Participants tend to start quite young, and report above average annual participation.



Motivational Factors

- The segmentation approach used in this analysis is based upon both the activities in which people engage and the motivations that are the drivers of that participation – including the level of participation. In developing the motivationally based segmentation system, respondents rated their reactions to the various activities on a series of 30 motivational drivers. As with the variety of activities studied, it makes sense to attempt to group these motivational statements into groups of similarity. Again, a *factor analysis* was employed to do so on those attributes whose meaning and differentiation are clear.

OUTDOOR FACTOR	
I enjoy looking at the scenery	3.60
I like being near water	3.28
It's a great way to enjoy the outdoors	3.63

THRILL FACTOR	
It's thrilling	3.31
It's exciting	3.51
I like the adventure	3.36
It's fun to talk about with others	3.33

RELAXATION FACTOR	
It's restful	3.47
To relax	3.73
I enjoy being competitive	2.77

FAMILY FACTOR	
It's something my family enjoys	3.22
It's a great way to spend time with kids/grandkids	3.08
It's a good way to create memories	3.51

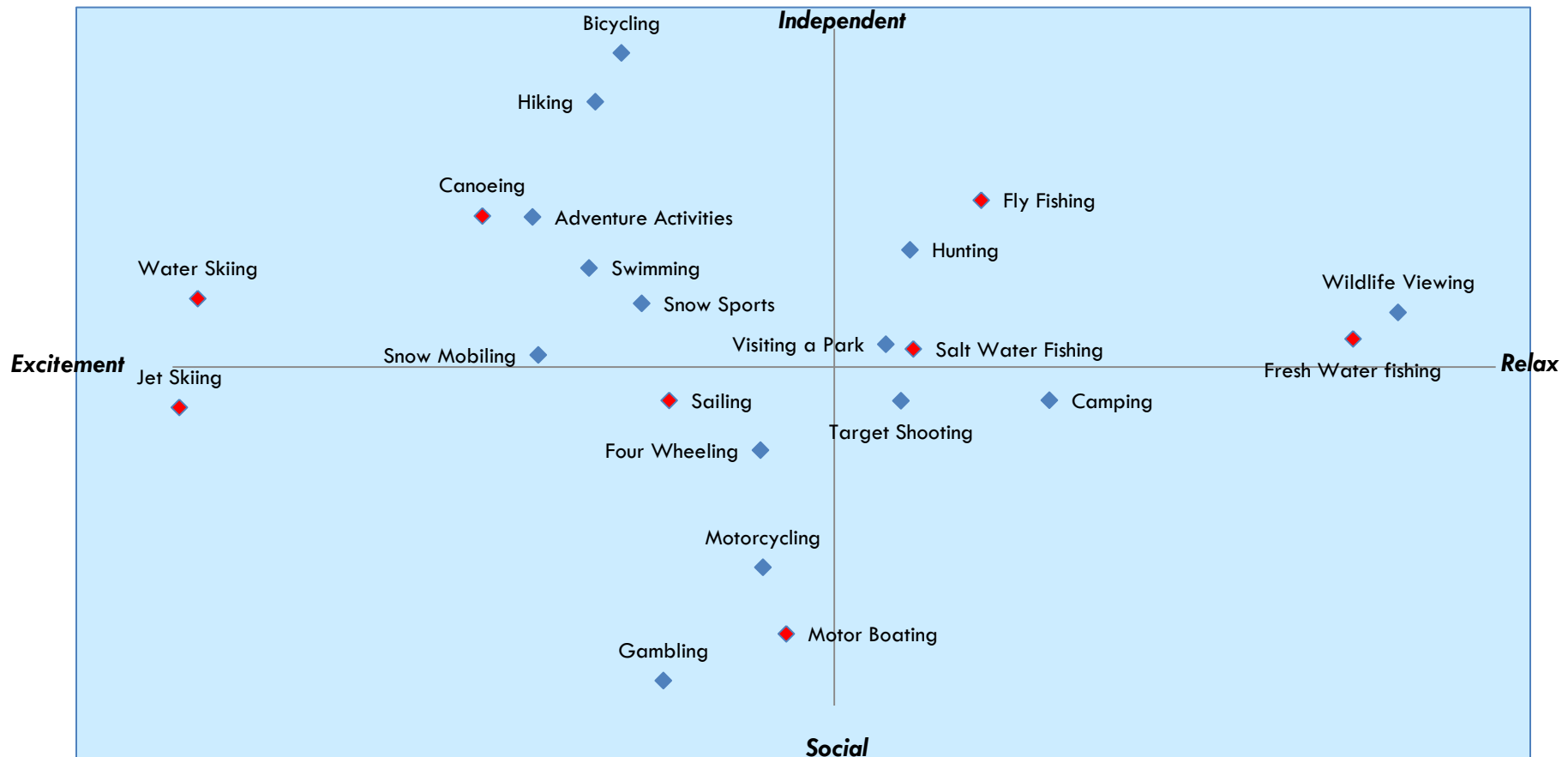
ESCAPE FACTOR	
Makes me feel free of responsibility	3.28
Gives me a feeling of control	3.08
It's a good way to spend time with friends	3.48
To get some time alone	3.08

EXPERIMENTAL FACTOR	
I only do this when on a vacation and looking for an activity	2.58
Typically I only do this when someone invites me to	2.85
It makes me feel invigorated	3.46
Helps me recharge	3.50

Activity/Motivational Relationships

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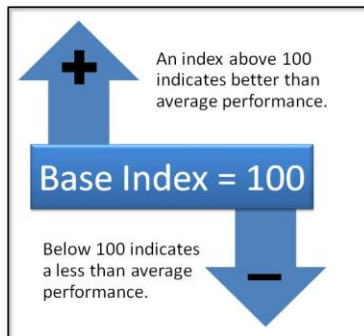
- Crossover activities are those which have the most similar motivational drivers, and understanding how these interrelate is a critical part of the profiling and marketing strategy process. To help further understand these issues, we developed an activity map utilizing a statistical procedure called *discriminant analysis* to identify which activities were most similar and which are most different.



Segment Profiling

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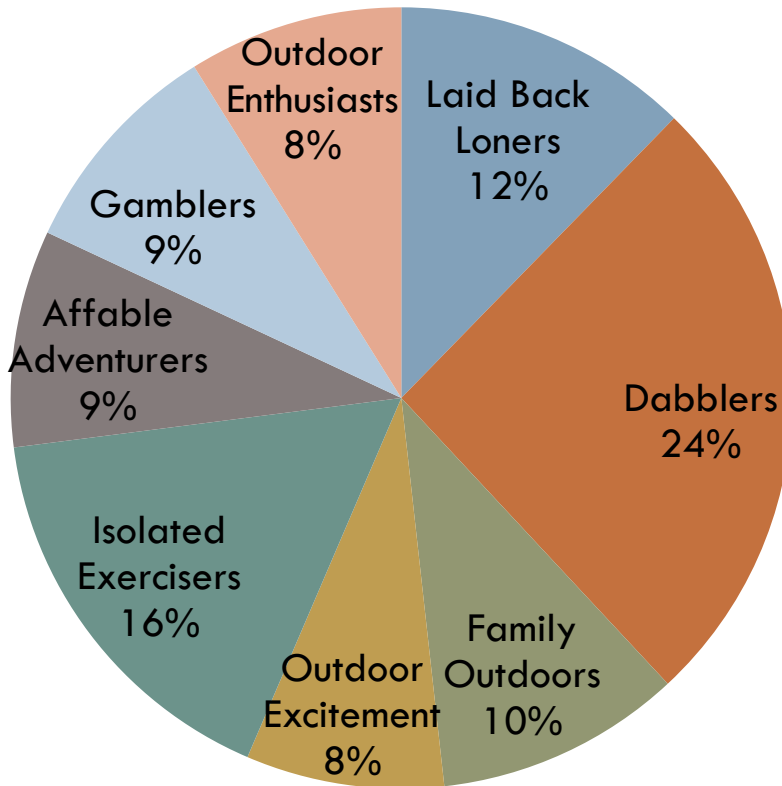
- When we review the individual segments that have been developed, we will consider each of them in light of their skew on each of the motivational factors. Specifically, we will employ a chart that scales the relative importance of each of these factors in driving a given segment's behavior.
- For example, this chart represents one of the segments that will be discussed. This group is motivated by relaxing and escaping.
- In addition to these motivational factor profiles, a review of much of the data includes indices.
- An index is simply a way to look at how much above or below average a segment falls on a given question.



- An index of 100 means that they are average. An index of 125 means that they are 25% above average and an index of 75 means they are 25% below average.

Segment Distribution

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- The approach utilized to segment the population focused upon leisure time activities and the motivational drivers for participation. Each respondent was asked about up to three different activities in which they engaged from a total of 33 different possible boating- and fishing-related and crossover activities. A set of 30 different motivational drivers were also explored. Rather than focus upon the motivations for boating and fishing activities solely and applying these segments to the population at large, the segments were more broadly constructed upon leisure activities so that a meaningful understanding of the size and potential of each group could be explored in depth, targets identified and marketing strategies developed.
- A profile with eight different segments was developed – excluding a small group of 4% of the respondents who could be characterized as inactive and who clearly offer no real potential.

Segment Overview

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Segment	% of Gen. Population	Short Description
Dabblers	24%	This segment is not avid about any specific activity. They dabble in many activities on certain occasions such as vacations or when invited to participate. Thus there is a social aspect to their activity choices. They index slightly above average for some boating and fishing activities and are potentially a good target for trial.
Outdoor Enthusiasts	8%	This segment is the most avid about outdoor activities, including fishing and boating as well as other activities. They are motivated by fun, recharging/relaxing, and simply getting away and enjoying the outdoors. Retention is likely the key with this group, and those in this segment who are lapsed participants are likely good targets to increase participation.
Family Outdoors	10%	These people enjoy participating in outdoor activities with family. They participate in a wide variety of outdoor activities, including fishing and boating. They are motivated by spending time with family, scenery and making memories. This appears to be an appealing segment.
Outdoor Excitement	8%	This segment also enjoys participating in outdoor activities, but they are not motivated by spending time with family and making memories. They are instead motivated by scenery, adventure, excitement and getting away to recharge – and represent another attractive segment. This segment is more likely to be single males without children at home.
Affable Adventurers	9%	This outdoorsy adventure-seeking and sociable segment seems to be a good target, as they index highly on all boating and fishing activities. They choose activities that allow them to be with family and friends while giving them a sense of adventure and excitement.
Isolated Exercisers	16%	This segment enjoys exercising because it makes them feel good and gives them some alone time. They are not into fishing and boating activities and would be a tough target.
Gamblers	9%	This segment likes to gamble and is motivated by competition, fun, excitement, challenge and being sociable. They show some interest in fishing and boating activities, but current low levels of participation and aversion to the outdoors make other segments more appealing.
Laid Back Loners	12%	This segment is not very active and focuses on arts, crafts and reading. They are motivated by activities that give them time alone and that are restful and relaxing. This group does not generally participate in fishing or boating and is probably not a good potential segment.

Target Segments

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Non-targets

Fishing	
	Current
Isolated Exercisers	9%
Gamblers	6%
Laid Back Loners	3%
Boating	
	Current
Isolated Exercisers	8%
Gamblers	5%
Laid Back Loners	2%

- Three of the segments have extremely limited potential. A total of 36% of the population is represented among them, but they account for only 18% of the anglers and 15% of the boaters. The fact is that boating and fishing don't deliver the benefits that these groups are interested in for their leisure activities. As such, they represent non-targets.

		FISHING		BOATING	
	Segment	Current	Potential	Current	Potential
CORE	Outdoor Enthusiasts	40%	18%	42%	31%
	Affable Adventurers	37%	43%	37%	48%
GROWTH	Family Outdoors	27%	46%	18%	62%
	Outdoor Excitement	26%	41%	19%	52%
OPPORTUNITY	Dabblers	15%	58%	13%	63%

- Of the five remaining segments, there are three different types of targets to consider.
- First, there are Core segments that represent a large share of current users while only representing a smaller share of potential participants.
- The second tier of segments will be referred to as the Growth targets. These segments are highly represented among current participants but also have a fairly high degree of potential as well.
- The last of the target segments can be characterized as an Opportunity segment. They represent a sizable portion of current users – but even more of the potential participants.

Non-Target Segment Profiles

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	Segment	% of Gen. Pop.	Market Size	Current Fishing	Current Boating	Description
Non-Target Segments	Isolated Exercisers	16%	36.3M	3.3M	2.9M	Enjoy exercising because it makes them feel good and gives them some time alone. Not likely to be interested in boating or fishing.
	Gamblers	9%	20.1M	1.8M	1.6M	Like gambling, playing cards, bowling and team sports. Enjoy a challenge and taking risks. Show some interest in fishing and boating, but they are not "outdoorsy" and have low levels of current participation.
	Laid Back Loners	12%	27.0M	810K	540K	Not very physically active. Focused on relaxing activities such as arts, crafts and reading. Generally not boaters or anglers.

Target Segment Profiles

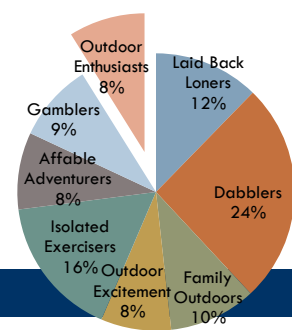
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	Segment	% of Gen. Pop.	Market Size	Current Fishing	Current Boating	Description
Core Segments	Outdoor Enthusiasts	8%	19.5M	7.9M	8.2M	Most avid about outdoor activities, including boating and fishing. Also avid about crossover activities, so generally "enthusiasts." Optimistic, like to have fun, concerned about environment.
	Affable Adventurers	9%	19.7M	7.2M	7.3M	Outdoorsy, adventure-seeking and sociable. Thrive on being active. Enjoy making memories with the family and friends
Growth Segments	Family Outdoors	10%	22.4M	6.2M	4.8M	Participate in a number of activities, including boating and fishing. Tend to be married with children and very family-oriented.
	Outdoor Excitement	8%	18.0M	4.8M	3.5M	More likely than other segments to be single, middle-aged men with no kids at home. Confident, optimistic, and enjoy a challenge.
Opportunity Segment	Dabblers	24%	56.6M	8.5M	7.0M	Not avid about any specific activity. Like to try many activities on occasions such as vacations or when invited. Skew young. Not motivated by relaxation – are on the move and have a competitive nature.

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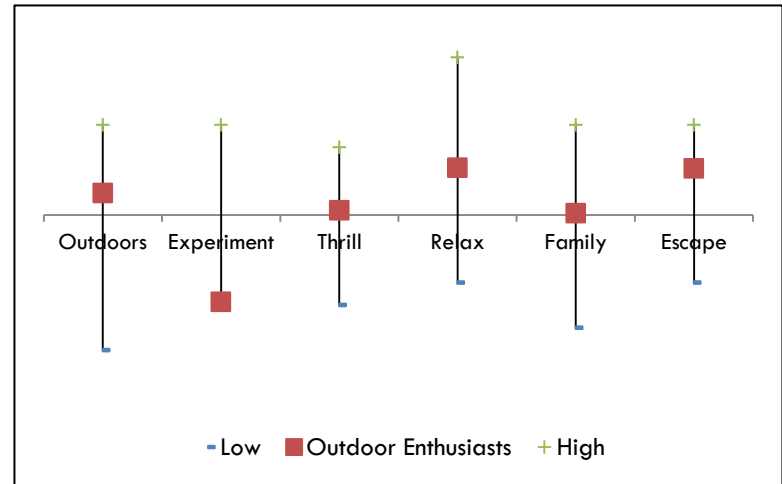
Core Segments

Outdoor Enthusiasts



As the name suggests, this segment is the most avid about outdoor activities, including boating and fishing. They are also more avid about crossover activities, so they are generally “enthusiasts.” They are the second-smallest segment behind Outdoor Excitement, accounting for 8% of the population, or 19.5 million U.S. adults. They are an optimistic group. They like to have fun but are also concerned about the environment and think it is important to conserve resources so future generations will have a better world. Geographically, the Outdoor Enthusiasts are more rural. Socioeconomically and demographically, the Outdoor Enthusiasts run the gamut from lower to upper class and young singles to empty nesters. There is some skew toward older and more affluent, but their ranging life stages and family situations make it hard to pinpoint activity companions. It could be their spouse, children, grandchildren or friends.

The key characteristic of this segment is that they are enthusiastic about what they do, including outdoor activities. What draws them to the outdoors is escaping from their usual routines to slow down, recharge and have fun. They know what they like and are not likely to try new things.



Participation	Current %	Index	Lapsed	Interested
Fresh water fishing	23%	153	31%	9%
Canoeing or kayaking	10%	162	27%	15%
Motor boating	9%	103	32%	15%
Salt water fishing	8%	146	24%	20%
Fly fishing	5%	161	12%	19%
Sailing	4%	144	17%	25%
Water skiing	4%	89	28%	15%
Jet skiing	3%	91	18%	20%

Motivators	Mean	Index
To have fun	4.1	106
I like the pace	3.9	105
Helps me recharge	3.7	105
To relax	4.0	105
To get away from my usual routine	4.0	105
It's a great way to enjoy the outdoors	3.8	104
It's something I've always done	3.4	104
It makes me feel invigorated	3.6	104

Outdoor Enthusiasts

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Key Activities	%	Index
Motor boating	23%	281
Jet skiing or using a wave runner	9%	252
Water skiing/water sports	10%	248
Canoeing or kayaking	15%	231
Sailing	6%	221
Fresh water fishing	33%	215
Salt water fishing	11%	209
Fly fishing	5%	176
Snow sports	9%	156
Wildlife viewing or bird watching	28%	156

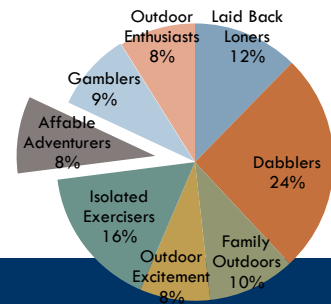
Demographics	Mean	Index
Married	59%	114
Age	50	104
Income	\$54,824	109
College plus	39%	104
Caucasian	86%	105
Any kids at home	37%	93

Activity Partners	%	Index
Alone	46%	110
Spouse	31%	91
Child	6%	33
Grandchild	3%	42
Other family	19%	79
Friends	33%	103

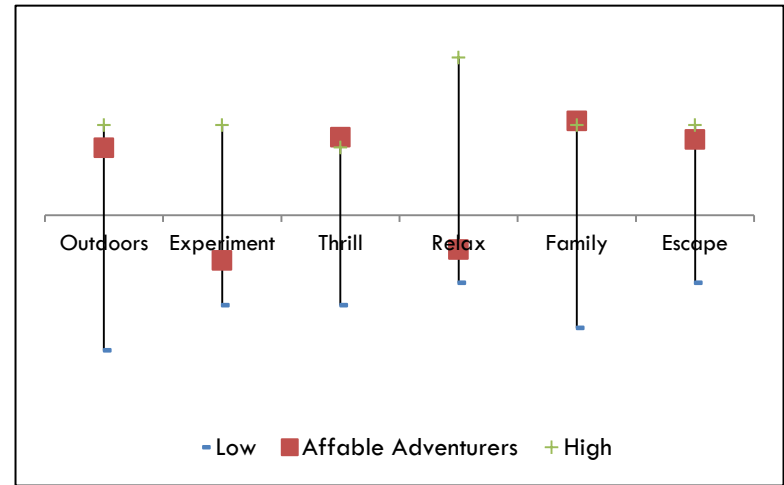
Marketing Recommendations:

- Show people having fun and enjoying themselves, while relaxing
- Scenery and outdoors are important also
- Vibe should be relaxed and carefree
- Invite them back to participate in activities they have enjoyed in the past

Affable Adventurers



Affable Adventurers are about 9% of the population, or 20 million U.S. adults. This group participates in the most different activities, and isn't looking for rest or relaxation. They like excitement, but they are also motivated to participate in social activities – ways to spend time with family and friends. They want their free time to be “family time” and want to create memories. This segment is generally married, and about 40% have children at home. They tend to be younger, with above average household income, but not education levels. This group thrives on being active, and they are twice as likely as the general population to participate in fishing and boating activities – and they have high levels of participation in all the boating and angling activities measured. They also participate in many other outdoor activities. One of the most important features of this group – the characteristic that leads to naming them “affable” – is that most of their activities are done with others.



Participation	Current			
	%	Index	Lapsed	Interested
Fresh water fishing	29%	190	36%	10%
Motor boating	21%	258	38%	15%
Canoeing or kayaking	13%	205	35%	18%
Salt water fishing	12%	231	25%	21%
Water skiing/water sports	11%	277	33%	16%
Jet skiing or using a wave runner	8%	222	26%	21%
Sailing	6%	198	21%	28%
Fly fishing	5%	167	16%	23%

Motivators	Mean	Index
It's a great way to spend time with kids/grandkids	3.9	115
It's a good way to spend time with friends	4.2	110
I like the adventure	4.0	109
It's a great way to enjoy the outdoors	4.3	109
I enjoy looking at the scenery	4.3	109
It's something my family enjoys	3.8	108
I like being near water	3.9	107
It's a good way to create memories	4.1	107
It's fun to talk about with others	3.9	106

Affable Adventurers

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Key Activities	%	Index
Water skiing/water sports	11%	277
Motor boating	21%	258
Outdoor adventure activities	30%	234
Salt water fishing	12%	231
Jet skiing or using a wave runner	8%	222
Canoeing or kayaking	13%	205
Hunting	14%	205
Four-wheeling/off-roading	14%	203
Camping	37%	200
Sailing	6%	198
Fresh water fishing	29%	190

Demographics	Mean	Index
Married	59%	114
Age	47	98
Income	\$54,123	108
College plus	33%	89
Caucasian	88%	108
Any kids at home	49%	124

Activity Partners	%	Index
Alone	20%	49
Spouse	48%	142
Child	37%	194
Grandchild	12%	195
Other family	36%	148
Friends	44%	139

Marketing Recommendations:

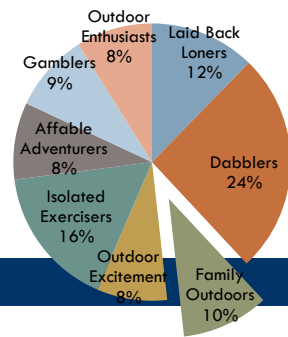
- Promote group activities
- Show families or groups of friends enjoying these activities
- The vibe should be exciting and upbeat – not relaxed or quiet
- Scenery and water are important, but not as much as the personal interactions
- Creating memories is a powerful motivator with this group

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Growth Segments

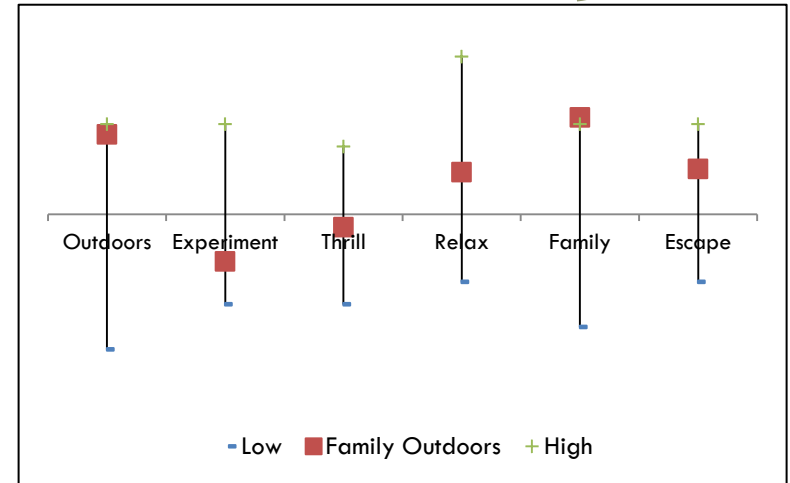
Family Outdoors

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The Family Outdoors segment makes up about 10% of the population, or 22 million U.S. adults. This active segment enjoys participating in a number of activities, including boating and fishing. They are motivated by making memories with their families, as well as by enjoying the outdoor scenery. Recreation is certainly a family affair for this group, which, of course, tends to be married with children. They have average levels of education and income and while not “rich,” they do have enough money for family activities.

They index above average on current participation levels in most boating and fishing activities. In addition, close to half of them are either lapsed participants or are interested in trying these activities in the future. Fly fishing and jet skiing might be a tougher sell to this segment, but they are certainly open to a number of boating and fishing activities.



Participation	Current %	Index	Lapsed	Interested
Fresh water fishing	25%	165	35%	11%
Motor boating	10%	122	42%	14%
Canoeing or kayaking	8%	129	32%	17%
Salt water fishing	6%	111	24%	21%
Water skiing	4%	108	31%	15%
Sailing	3%	121	25%	25%
Fly fishing	3%	115	14%	20%
Jet skiing	3%	86	20%	21%

Motivators	Mean	Index
It's a great way to spend time with kids/grandkids	3.9	122
It's something my family enjoys	3.7	109
It's a great way to enjoy the outdoors	4.1	109
I enjoy looking at the scenery	4.0	107
I like being near water	3.7	107
It's a good way to create memories	3.9	107
It's a good way to spend time with friends	3.8	104

Family Outdoors

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Key Activities	%	Index
Wildlife viewing or bird watching	29%	159
Fresh water fishing	24%	157
Hunting	10%	141
Camping	26%	140
Visiting a state or national park	40%	140
Arts and crafts	43%	139
Gardening	53%	134
Hiking	24%	129
Canoeing or kayaking	8%	123
Swimming	43%	121

Demographics	Mean	Index
Married	56%	109
Age	50	104
Income	\$51,421	103
College plus	36%	97
Caucasian	87%	106
Any kids at home	48%	120

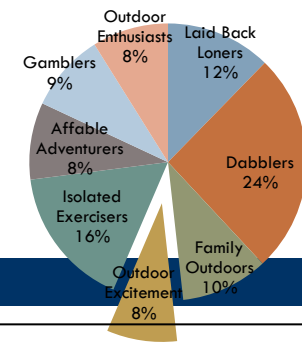
Activity Partners	%	Index
Alone	35%	83
Spouse	42%	123
Child	32%	170
Grandchild	13%	208
Other family	34%	140
Friends	32%	102

Marketing Recommendations:

- Promote enjoying the water together and sharing experiences with the entire family (not just one other member)
- The vibe should be relaxing and quiet
- Scenery and water are important
- Sharing family memories is the most powerful motivator

Outdoor Excitement

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Outdoor Excitement is one of the smaller segments, accounting for 8% of the population, or 18 million U.S. adults. They are more likely than other segments to be middle-aged men with below-average incomes who are not married and do not have children at home. They are also more likely than other segments to be non-Caucasian (African-American and Hispanic). In terms of their general attitudes and opinions, they are confident, optimistic and enjoy a challenge. They are concerned about the environment and are likely to say that they are doing what they can to protect it. They participate in outdoorsy activities and are motivated by adventure, thrills, scenery, and simply enjoying the outdoors. They are more likely than other segments to participate in recreational activities alone. Another way to describe this segment could be “Man vs. Nature.”



Participation	Current %	Index	Lapsed	Interested
Fresh water fishing	23%	153	31%	9%
Canoeing or kayaking	10%	162	27%	15%
Motor boating	9%	103	32%	15%
Salt water fishing	8%	146	24%	20%
Fly fishing	5%	161	12%	19%
Sailing	4%	144	17%	25%
Water skiing	4%	89	28%	15%
Jet skiing	3%	91	18%	20%

Motivators	Mean	Index
I like the adventure	3.9	107
It's thrilling	3.8	107
I enjoy looking at the scenery	4.1	107
It makes me feel invigorated	3.9	106
It's a great way to enjoy the outdoors	4.1	105
To get exercise	3.5	105
Makes me feel free of responsibility	3.7	105
Helps me recharge	3.9	104
I like the challenge	3.8	104
It's exciting	3.9	104

Outdoor Excitement

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Key Activities	%	Index
Canoeing or kayaking	10%	155
Fly fishing	4%	152
Motorcycling	8%	151
Fresh water fishing	23%	147
Golfing	14%	144
Sailing	4%	138
Salt water fishing	7%	135
Other sports	6%	132
Camping	23%	122
Target shooting	9%	120
Wildlife viewing or bird watching	22%	120

Demographics	Mean	Index
Married	44%	85
Age	49	103
Income	\$47,146	94
College plus	39%	103
Caucasian	81%	99
Any kids at home	25%	62

Activity Partners	%	Index
Alone	46%	110
Spouse	31%	91
Child	6%	33
Grandchild	3%	42
Other family	19%	79
Friends	33%	103

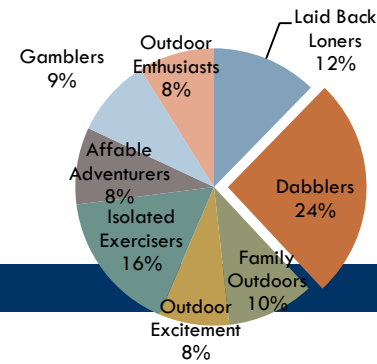
Marketing Recommendations:

- Show single participants enjoying the outdoors – “man against the elements”
- Vibe should be exciting and adventurous
- Opportunity to portray and attract non-Caucasian participants
- With boating, need to highlight speed, excitement to make it appealing

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Opportunity Segment

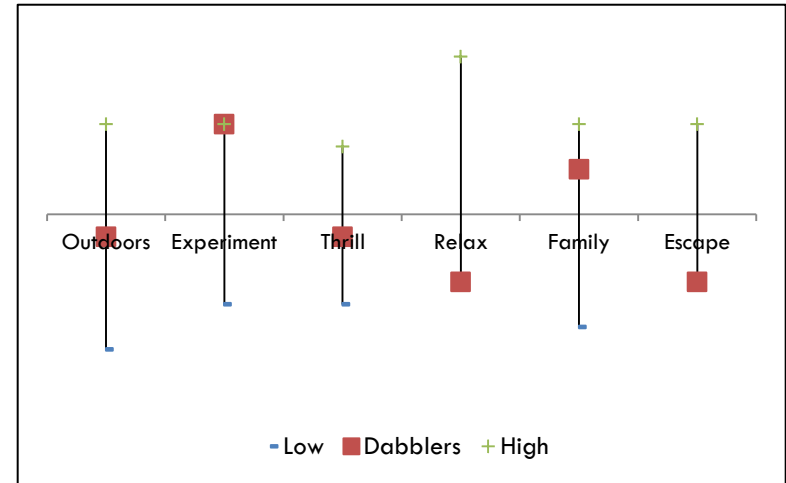
Dabblers



Dabblers account for about one-quarter of the population, or about 57 million U.S. adults, which makes them the largest segment. Their defining characteristic is that they are not avid about any particular activity, but they are willing to try new things given the right circumstance or invitation. Their attitude tends to be optimistic about life and they like to have fun. They skew young, have lower than average income, and are more likely than other segments to be students. About 40% of them have children at home.

Given their early life stage, they might not have found a niche or become set in their ways, so they are willing to experiment with a number of new activities. Having children also likely plays a role in their “dabbling,” as they want to expose their kids to many different activities.

Dabblers’ recreation choices are motivated by experimenting and socializing/spending time with family. They are likely to do activities only in certain circumstances, such as on a vacation. They are not motivated by relaxation or escape; they are on the move, do not like to just sit around, and have a competitive nature.



Participation	Current %	Index	Lapsed	Interested
Fresh water fishing	12%	76	37%	20%
Motor boating	6%	73	32%	23%
Canoeing or kayaking	5%	77	27%	24%
Salt water fishing	5%	88	25%	27%
Water skiing/water sports	4%	99	26%	25%
Jet skiing or using a wave runner	4%	111	20%	27%
Fly fishing	4%	127	16%	26%
Sailing	3%	110	20%	31%

Motivators	Mean	Index
I only do this when on a vacation and looking for an activity	3.3	120
I enjoy being competitive	3.4	117
Typically I only do this when someone invites me to	3.3	111
It's a great way to spend time with kids/grandkids	3.5	108
To get some time alone	3.5	107
Gives me a feeling of control	3.4	106
To get exercise	3.5	105
I like being near water	3.6	103
It's something my family enjoys	3.5	102

Dabblers

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Key Activities	%	Index
Snowmobiling	4%	159
Tennis	9%	136
Team Sports	12%	133
Fly fishing	4%	127
Running/jogging	22%	125
Four-wheeling/off-roading	8%	120
Hunting	8%	118
Bowling	25%	113
Snow sports	6%	112
Jet skiing or using a wave runner	4%	111

Demographics	Mean	Index
Married	49%	95
Age	42	87
Income	\$46,709	93
College plus	35%	93
Caucasian	72%	88
Any kids at home	48%	121

Marketing Recommendations:

- Promote the competitive nature – against the wind or ocean
- Show families enjoying this and working/competing together
- The vibe should be invigorating – neither relaxed nor quiet
- Scenery and water are important inclusive of a strong environmental sense
- Sharing new experiences memories is the most powerful motivator

Overview

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	Segment	Activity Partners	Motivations	Boating/Fishing Activities to Target
Core Segments	Outdoor Enthusiasts	Family or friends, but not a key motivator	Relaxation Escape Outdoors	Jet skiing Water skiing
	Affable Adventurers	Not alone - with family or friends	Family/Memories Excitement/Thrills Escape Outdoors	Motor boating Water skiing
Growth Segments	Family Outdoors	Family (spouse, child, grandchild or other family)	Family Memories Quiet Relaxation Outdoors	Fresh water fishing Canoeing Motor boating
	Outdoor Excitement	Alone	Adventure Excitement/Thrills Challenge (man vs. the elements)	Canoeing/kayaking Sailing Fresh water fishing Fly fishing Salt water fishing
Opportunity Segment	Dabblers	Will do with family, friends, or alone	Experimenting Competition Adventure Vacation/Family/ Social Activities	Sailing Salt water fishing