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Boating Trends & the Significance of Demographic Change

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WHAT THIS PRESENTATION COVERS

- **The NSRE & its background**
- **An overview of population growth & demographic diversification**
- **American's environmental values**
- **Recreation boating participation & trends**
- **Segmenting the American public & understanding their differences**

HISTORY & CURRENT COVERAGE OF THE NATIONAL RECREATION SURVEY

- **1st National Recreation Survey (NRS)
1960**
- **1965, 1972, 1977, 1982, 1995 & 2000-02**
- **National & Regional Demand
Assessments**
- **Renamed the NSRE**
- **Nation's On-going, Long-term Outdoor
Recreation & The Environment Survey**

MODULES OF QUESTIONS

- **Participation in Recreational Activities**
- **Frequency of Participation in Days**
- **Favorite Activities & Constraints**
- **Nature-based Trip Taking/Tourism**
- **Opinions about Recreation Area Management**
- **Environmental Attitudes & Values**
- **Values & Objectives for Management of Public Lands**



MODULES OF QUESTIONS

- **Wilderness Values, Knowledge, Visitation, & Management**
- **Knowledge, Objectives, Satisfactions with Congressionally Designated Areas**
- **Ownership, Uses, Motivations & Plans for Private Land**
- **Wildland-Urban Interface Issues & Attitudes**
- **Lifestyles, Demographics & Disabilities**



LIFESTYLES--NEW

- **Hobbies or other interests**
- **Chores or gardening at home**
- **Involvement with family**
- **Interest in sports**
- **Community or civic activities**
- **Vacationing and travel**
- **Self study and cultural events**
- **Exercise**



DETAILED HOUSEHOLD & INDIVIDUAL DATA

(Employs Bureau of Census Protocols)

**No. of household members by age & sex
Citizenship, where born & country of origin
Race & ethnicity, Disabilities
Occupation & employment status
City, rural/urban, ZIP Code
Childhood origin
Income & education**

NSRE

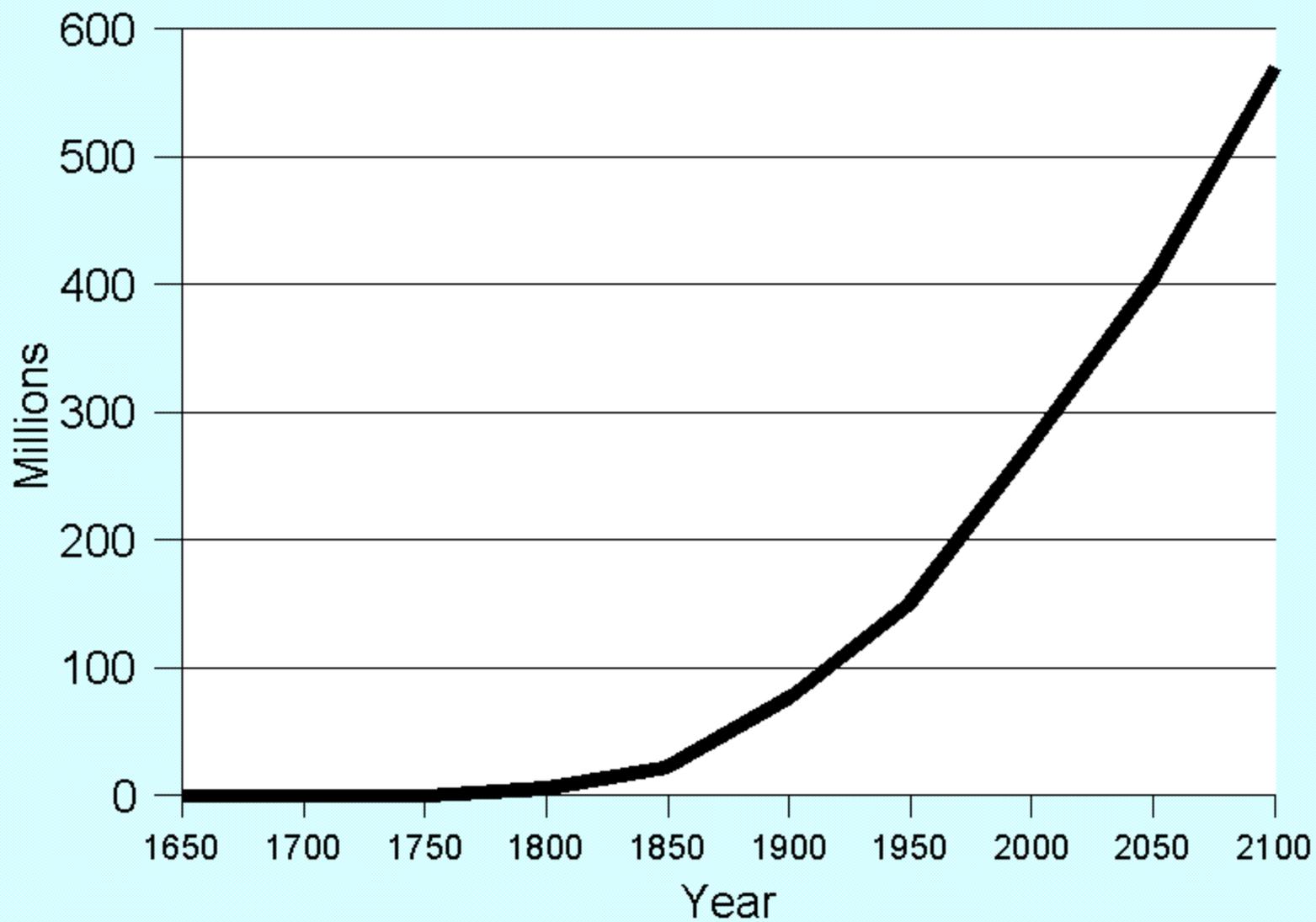
- **80,000 households, Keys to the Arctic Wildlife Refuge**
- **Non-institutionalized individuals 16 & older**
- **Nation's 8th on-going recreation survey**
- **USFS, NOAA, ERS, EPA, NPS, BLM.**
- **National Scenic Byways, Wilderness, State Agencies, Bicycle Safety, Pew Wilderness Center,**



***DEMOGRAPHIC
CHANGE:***

**Know the Trends &
Better Anticipate
Market Shifts**

U.S. Population Growth



Our Changing American Society

➤ **1 million** new legal immigrants per year

➤ More people:

1990	248 mm
2020	325 mm
2050	404 mm
2100	571 mm

➤ Getting older: Median age 35 ® 38 (2020)

➤ Changing ethnicities by 2050:

Anglo Americans	76% ® 50%
African Americans	12% ® 15%
Hispanic Americans	9% ® 21%
Asian Americans	4% ® 11%

Demographic Percentages: 1960 & 2000

Family Income (1998\$s) (N.B:45 million U.S. families in 1960, almost 75 million families in 2002)

<u>Percentiles</u>	<u>1960</u>	<u>2000</u>
20 th	\$14,093	\$21,600
40 th	\$24,298	\$37,692
60 th	\$32,215	\$56,020
80 th	\$44,547	\$83,693
95 th	\$68,521	\$145,199

Demographic Percentages: 1960 & 2000

Educational Attainment, (Age 25 & Over) Percent

<u>Education level</u>	<u>1960</u>	<u>2000</u>
8 th grade or less	37.5	7.4
9-11 th grade	18.5	9.7
High school graduate	27.1	33.8
Some college	9.1	24.7
College degree or higher	7.7	24.4

**WHAT
AMERICAN'S
VALUE ABOUT
OUR
ENVIRONMENT**

Spending on the Environment

Too Much	7%
Too Little	49%
About Right	28%
(Don't Know)	(15%)

Humans Were Meant to Rule Over Nature

29%

14%

Strongly Agree

15%

Somewhat Agree

61%

(6% Neutral)

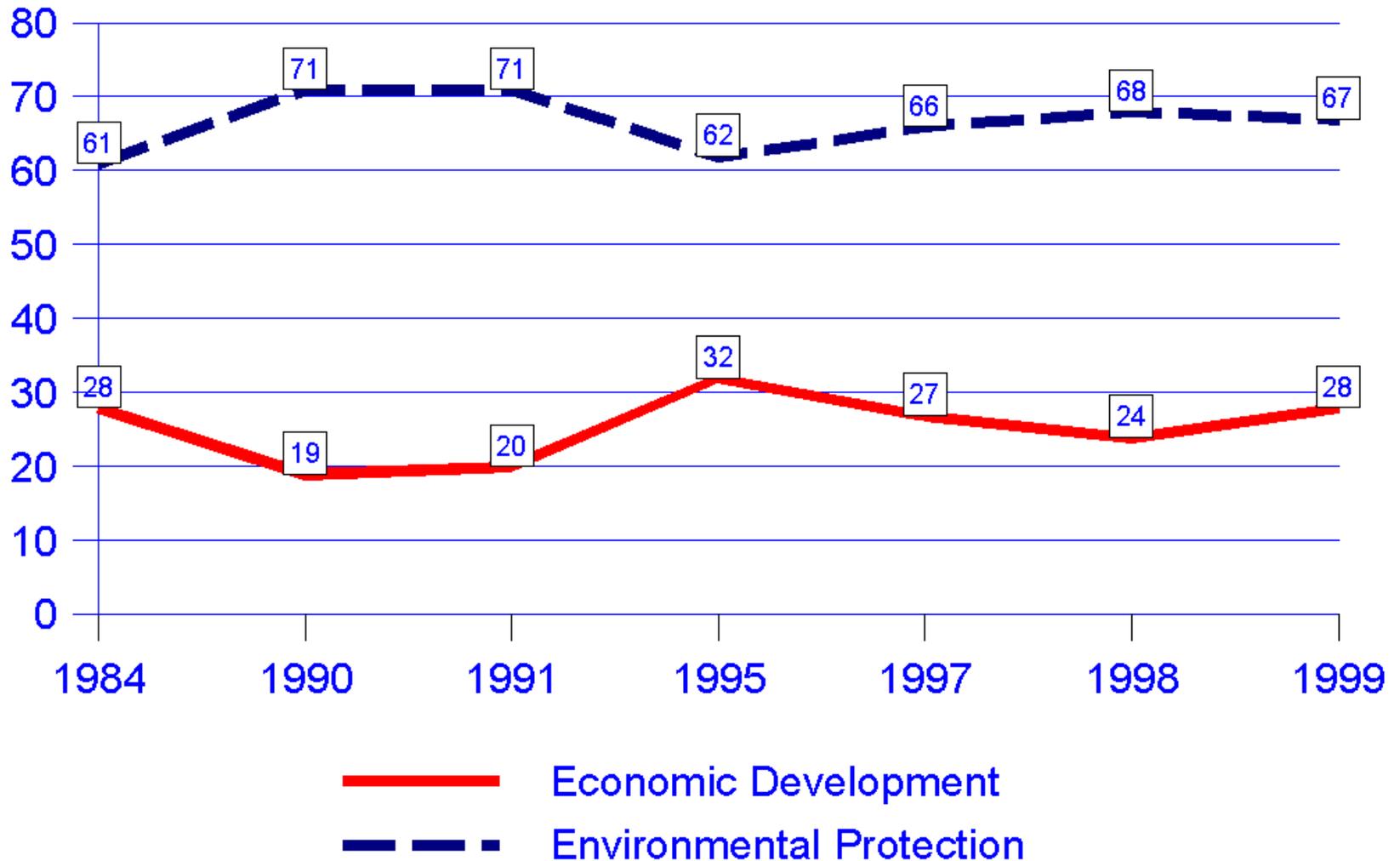
19%

Somewhat Disagree

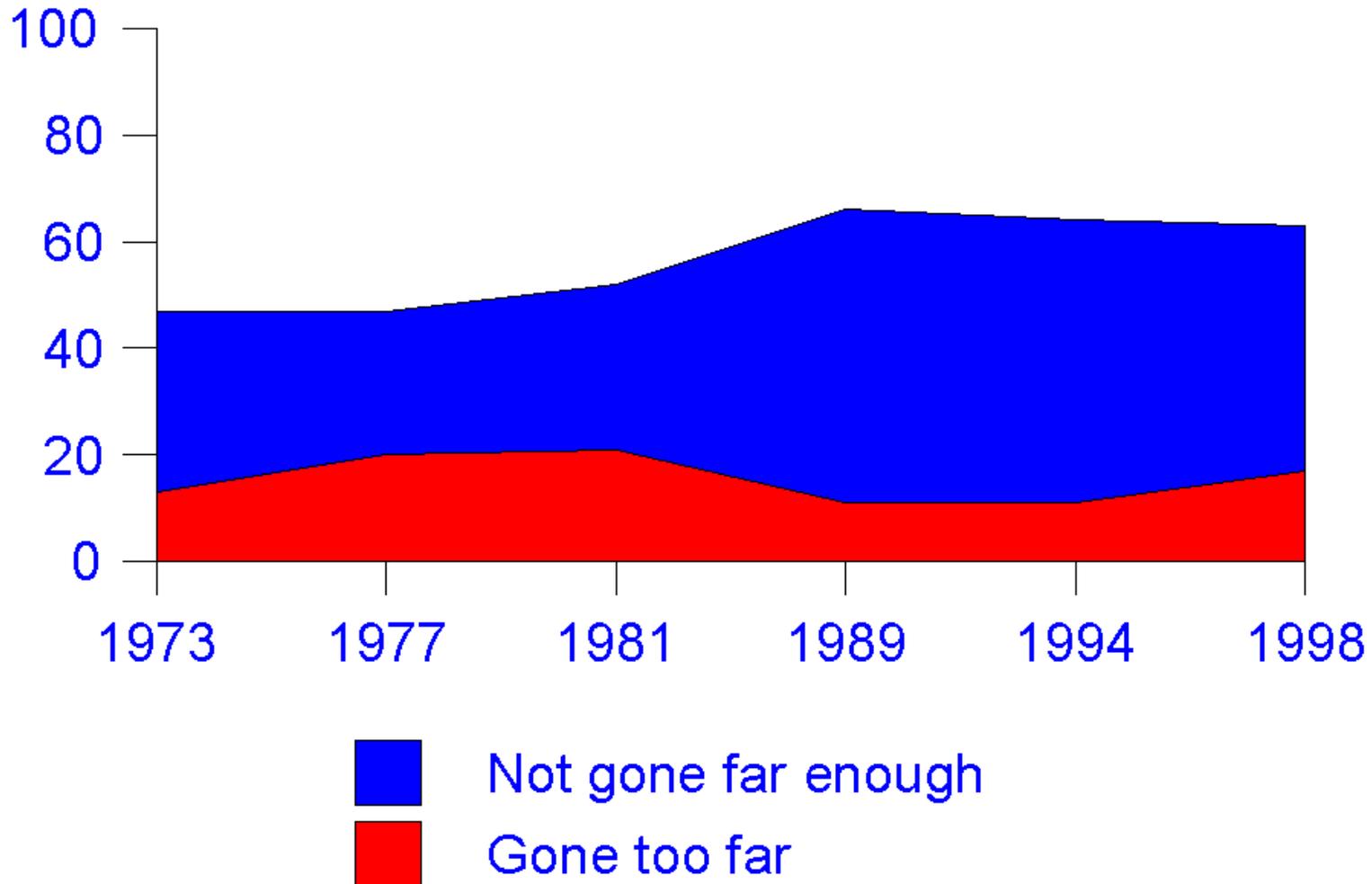
42%

Strongly Disagree

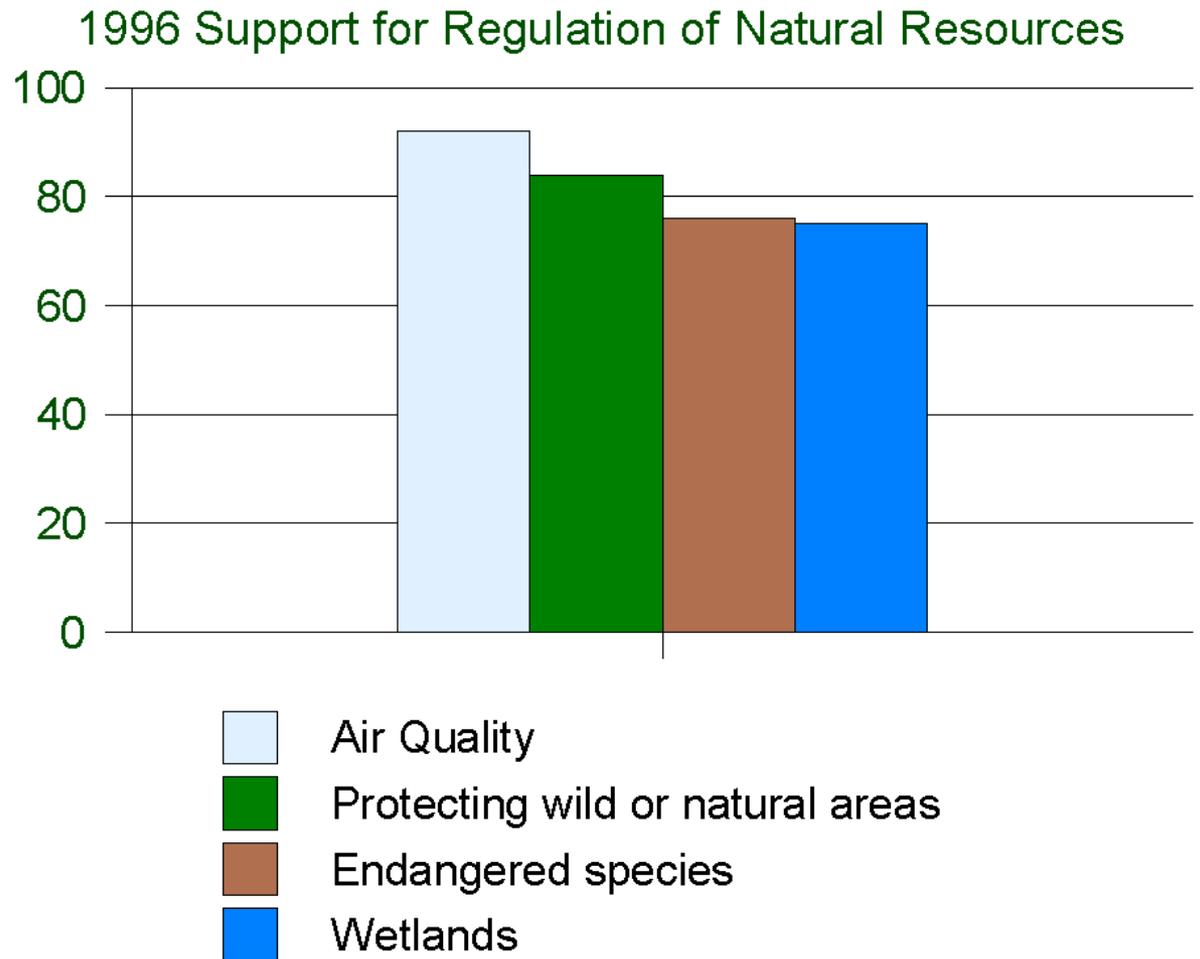
Percentages Indicating Environmental Protection or Economic Development are Highest Priority



Environmental Protection Laws and Regulations Have:



Percentage of Americans Reporting Regulation of Natural Resources is “Just the Right Amount” or has “Not Gone Far Enough.”





LONG-TERM
TRENDS

At Present

- **Over 97.6 percent report activities**
- **Most are adding to their recreation menu**
- **Living longer means staying active longer**

Shifts in Outdoor Recreation Markets

- **Technology innovations are making more areas, more accessible:**
 - Jet boats
 - Light-weight gear
 - Sub-zero sports clothing
 - Sticky climbing shoes
 - Night scopes
- **Risk/Adventure pursuits are gaining in popularity:**
 - Base jumping
 - Falls shooting
 - Mountain boarding
 - "Jet skiing"
- **Traditional outdoor activities still growing (moderately); consumptive activities declining; viewing/learning activities on the rise.**

TRENDS



1980's

- Almost 90 percent of Americans participated in Outdoor Recreation
- Walking, picnicking, sightseeing, swimming, fishing, & bicycling the most popular activities

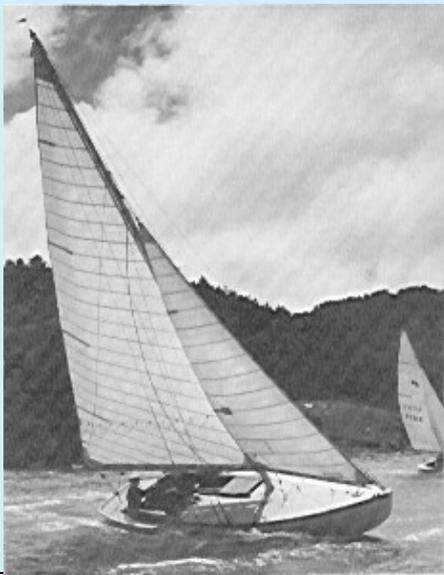
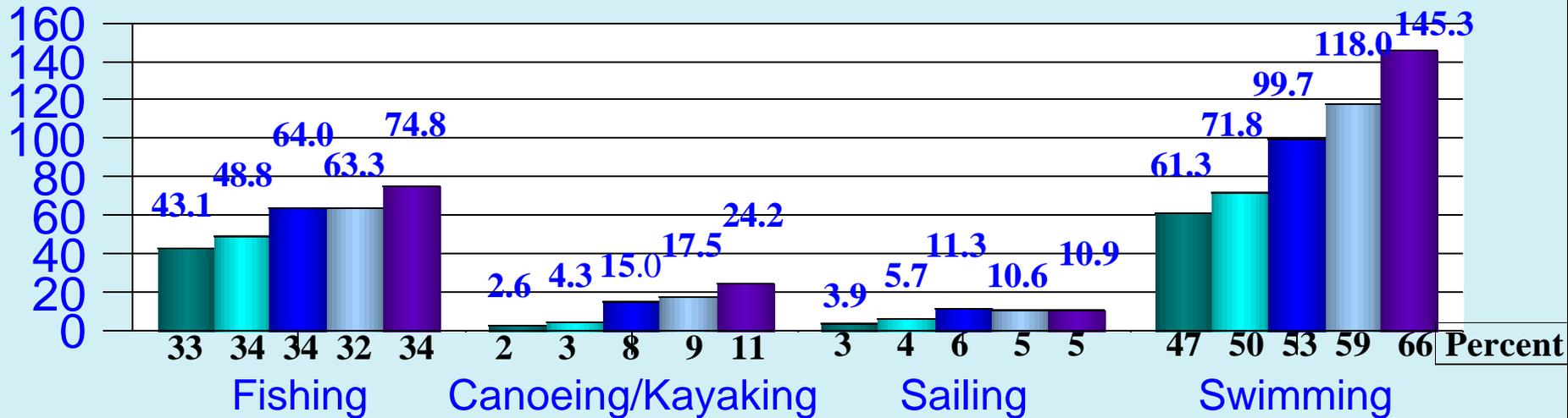
1990's

- 97 percent participated
- List of pursuits getting longer, more diverse
- Walking, sightseeing, swimming, picnicking, boating most popular

Long-Term Trends - Water

(12 or older)

Millions Participating



- 1960 (131 million)
- 1965 (144 million, 10% more)
- 1982-83 (188 million, 44% more)
- 1994-95 (216 million, 65% more)
- 1999-2000 (220 million, 68% more)



Activities Adding the Most Participants 16 or older, 1982-2002

Millions

Growth No. in 2002

Walking	85.4	179.0
Bird watching	50.0	71.2
Hiking	48.4	73.1
Swimming/river, lake, or ocean	36.4	92.9
Sightseeing	32.7	114.0
Picnicking	31.8	116.6
Bicycling	27.4	83.9
Developed camping	22.8	52.8
<u>Motor boating</u>	17.8	51.4
Off-road driving	17.3	36.7

PARTICIPATION TRENDS IN THE UNITED STATES

Activity	Millions of participants 1994-95	Millions of participants 2000-02	% change 1994- 2002
<u>Kayaking</u>	<u>2.58</u>	<u>7.29</u>	<u>182.56</u>
Snowboarding	4.43	10.53	137.70
<u>Jet skiing</u>	<u>9.26</u>	<u>20.31</u>	<u>119.33</u>
View/photo fish	26.82	53.06	97.84
Snowmobiling	6.95	11.81	69.93
View wildlife	61.11	95.26	55.88
Backpacking	14.80	22.76	53.78
Day hiking	46.68	70.62	51.29
<u>Canoeing</u>	<u>13.76</u>	<u>20.63</u>	<u>49.93</u>

PARTICIPATION TRENDS IN THE UNITED STATES

Activity	Millions of participants 1994-95	Millions of participants 2000-02	% change 1994- 2002
<u>Coldwater fishing</u>	<u>20.27</u>	<u>28.81</u>	<u>42.13</u>
Developed camping	40.53	55.73	37.50
Drive off-road	27.26	37.21	36.50
<u>Rafting</u>	<u>14.88</u>	<u>20.22</u>	<u>35.89</u>
Walk for pleasure	130.66	177.00	35.47
Visit nature centers	90.93	122.28	34.48
Family gathering	120.97	156.78	29.60
View birds	52.83	69.26	31.10
<u>Motor-boating</u>	<u>47.0</u>	<u>51.8</u>	<u>10.2</u>

PARTICIPATION BY SETTING

Activity	Millions of participants (2002) 2003	White water No's	Ocean No's	Salt water No's
<u>Kayaking</u>	(7.3) 13.6	2.6	5.1	2.1
<u>Canoeing</u>	(20.6) 26.2	3.8	1.5	2.1

N.B. Preliminary data results for 2003

Regions Where Participants Reside

Type of Activity	Millions of Participants				National
	South	North	Rocky Mtn./ Great Plains	Pacific Coast	
Trail/street/road	59.6	82.6	15.7	30.4	188.4
Viewing/learning	44.5	66.2	12.4	23.1	146.1
Camping	18.5	27.4	7.5	12.4	66.5
Hunting	8.8	9.6	2.9	2.1	23.7
Outdoor adventure	35.2	50.5	11.1	19.8	117.0
<u>Boating/floating</u>	<u>23.6</u>	<u>35.3</u>	<u>6.7</u>	<u>10.8</u>	<u>76.5</u>
Fishing	26.8	29.2	6.7	9.1	72.4
Swimming	40.1	57.6	9.2	21.2	127.4
Ski/sledding/snowmobiling	8.9	31.9	5.2	8.3	54.4
Outdoor team sport	14.6	21.3	3.9	7.4	46.9
Social activities	53.3	74.6	14.4	27.6	169.9

FASTEST GROWING

Kayaking

Snowboarding

Jet skiing

View or
photograph fish

Snow-mobiling

Ice Fishing

Sledding

View wildlife

Backpacking

Day hiking

Bicycling

Horseback riding

Canoeing

Mountain climbing

Coldwater
fishing

Developed
camping

Drive off-road

Rafting

Walk for pleasure

Surfing

Visit nature
centers

Visit arch. sites

View birds

Family gathering

SLOWEST GROWING

Motor-boating

Primitive camping

Sailing

Visit historic sites

Downhill skiing

Snorkeling/ scuba

Visit beach/waterside

Anadromous fishing

Caving

Small game hunt..

Migratory bird
hunting

Picnicking

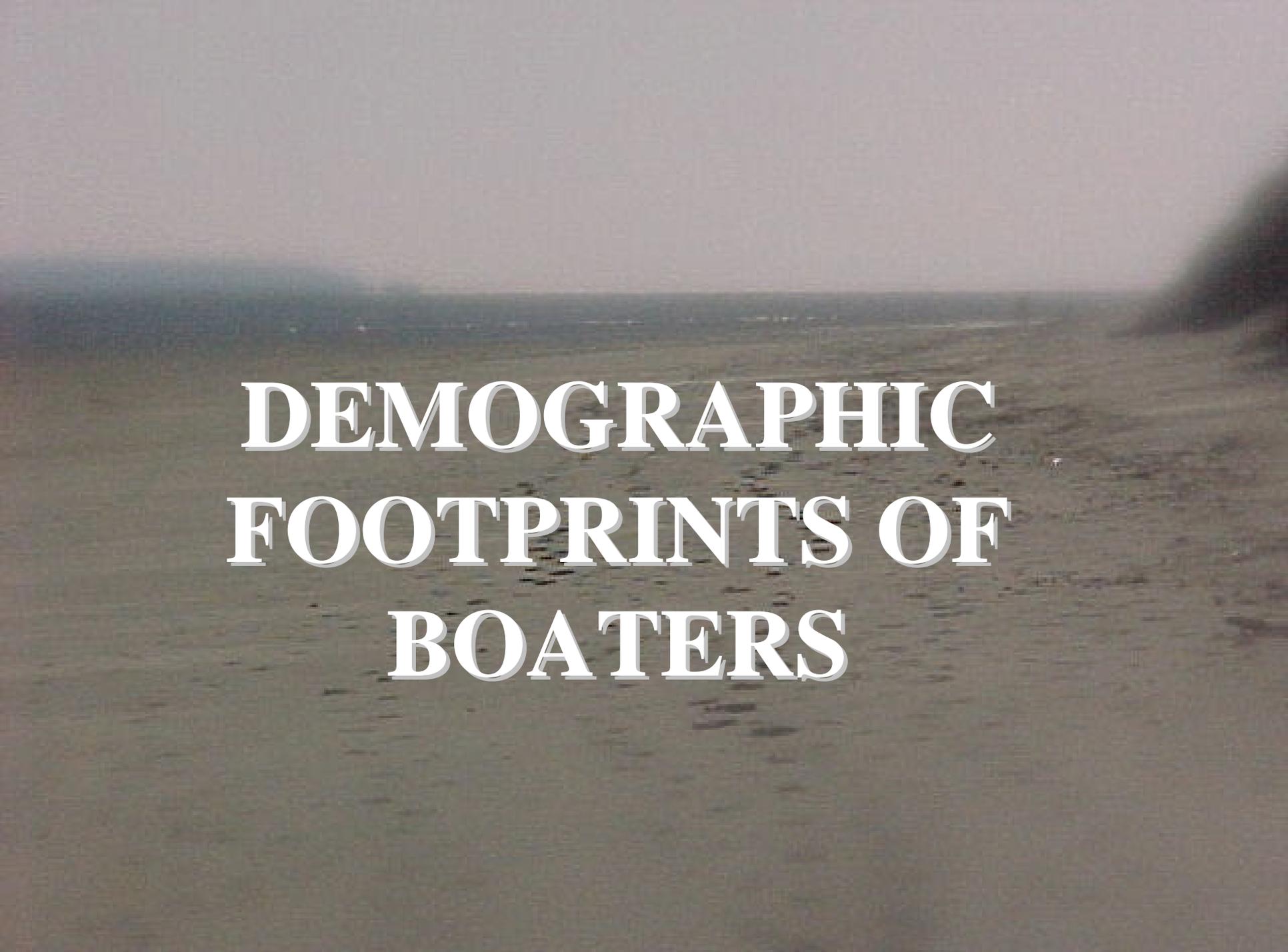
Warm-water fishing

Saltwater fishing

Swimming

Projected Demand to 2020

Activities	Millions Participating (1995)	Indexed % Change (Base year is 1995)		
		People	Days	Trips
<u>Water-Based</u>				
Going to the Beach	124	1.24	1.17	1.17
Motor Boating	47	1.21	1.14	1.16
Swimming	78	1.21	1.12	1.09
Fishing	58	1.17	1.17	1.10
Canoeing	14	1.15	1.28	1.14
Rafting/Floating	15	1.07	1.17	1.10
<u>Winter-Based</u>				
Cross-Country Skiing	6	1.26	0.96	1.12
Downhill Skiing	17	1.22	1.31	1.36
Snowmobiling	7	1.09	1.32	1.35

The background of the slide is a photograph of a vast, flat, sandy landscape, likely a beach or dunes, under a hazy, overcast sky. The sand is a light, muted brown color, and the horizon is visible in the distance. The overall tone is desaturated and somewhat somber.

DEMOGRAPHIC FOOTPRINTS OF BOATERS

CANOERS

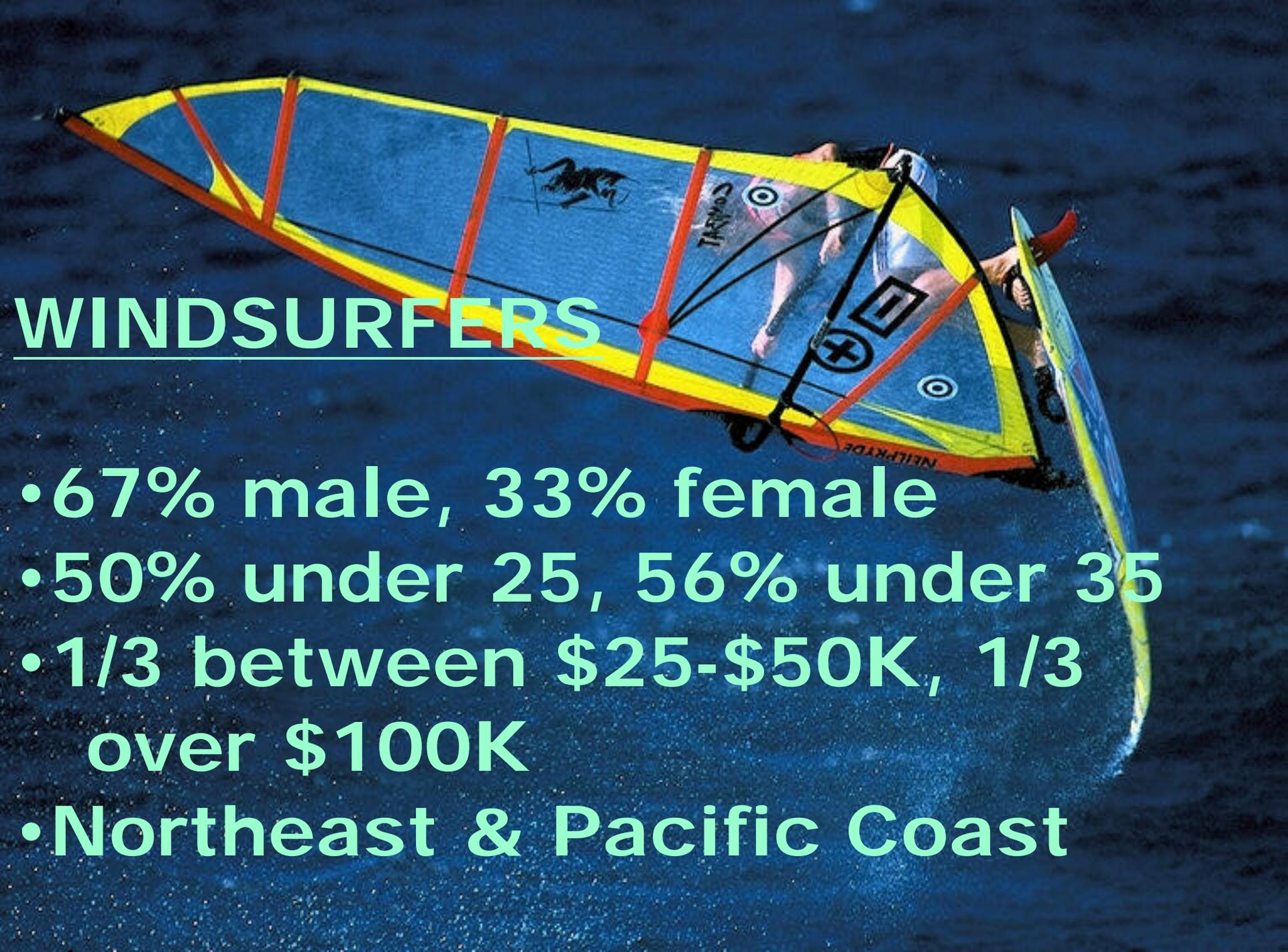
- 43% female, 57% male
- 87% non-Hispanic white
- 33% under 25,
77% under 45
- Incomes \$25K to \$75K
- Under 80% urban
- Favored by Northeasterners
& Midwesterners

KAYAKERS

- 44% female, 56% male
- 85% non-Hispanic white
- 60% under 35, 40% under 25
- Over 1/3 earn under \$25K
- 85% urban
- Heavier participation in New England & Pacific Coast States

SAILERS

- **48% female, 52% male**
- **84% Non-Hispanic white**
- **44% under 35**
- **Middle to high income earners**
- **87% urban**
- **Favored in the North-east**



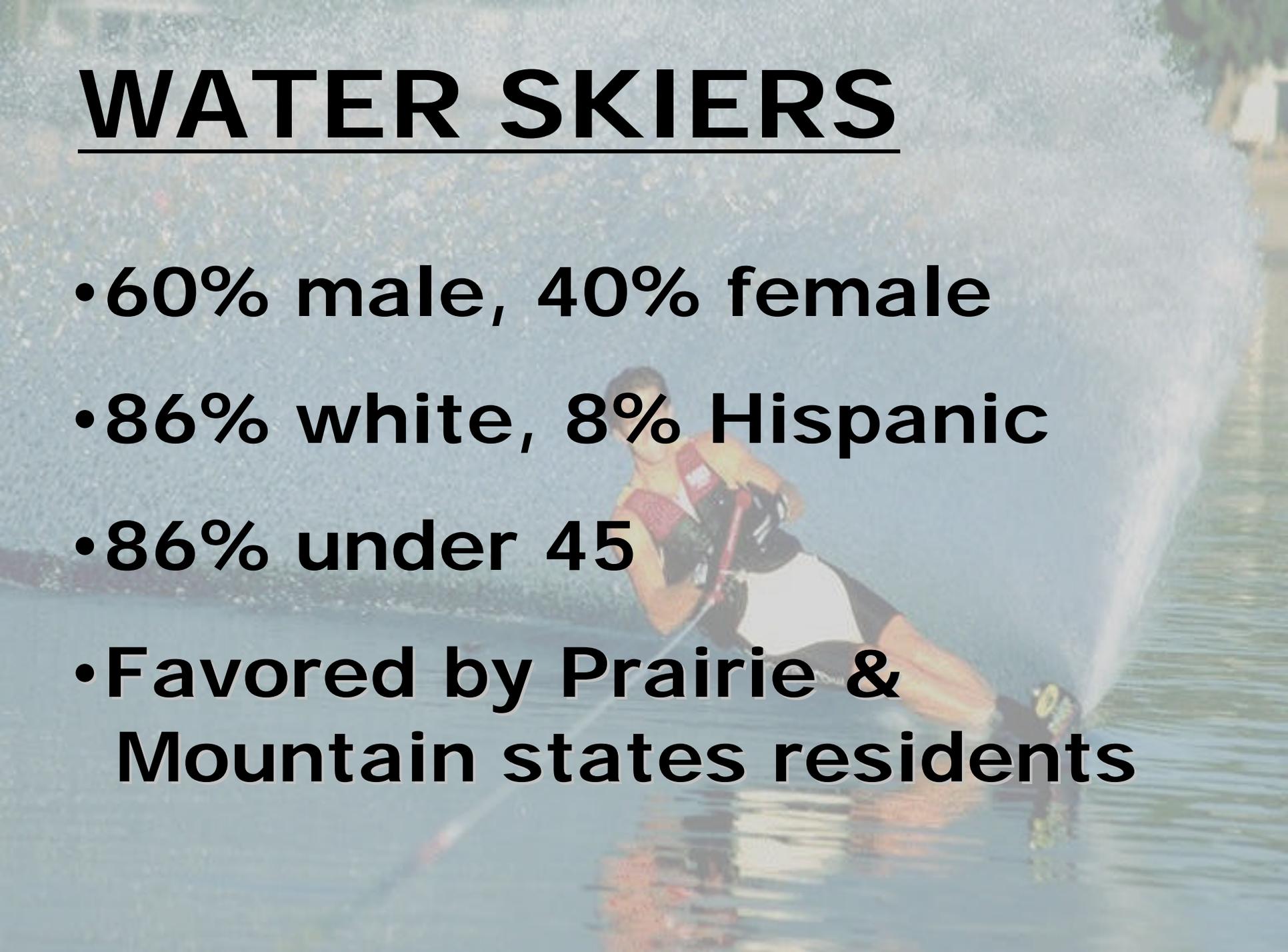
WINDSURFERS

- 67% male, 33% female
- 50% under 25, 56% under 35
- 1/3 between \$25-\$50K, 1/3 over \$100K
- Northeast & Pacific Coast

MOTOR BOATERS

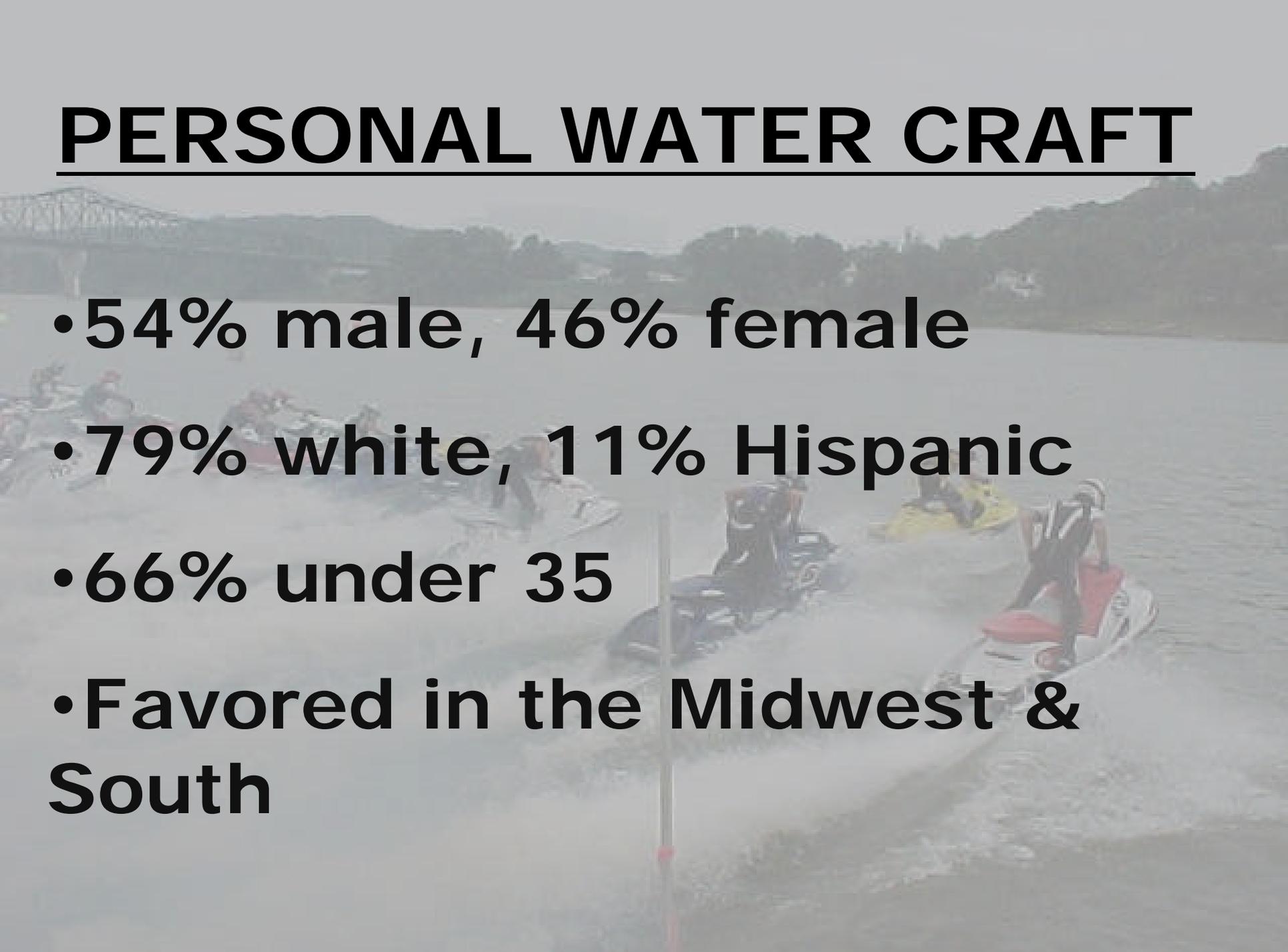
- 57% male, 43% female
- 52% between \$25K & \$75K
- 77% urban
- Favored in the Lake, Midwest & South Atlantic states
- 58 % between 25 & 55

WATER SKIERS



- 60% male, 40% female
- 86% white, 8% Hispanic
- 86% under 45
- Favored by Prairie & Mountain states residents

PERSONAL WATER CRAFT

A group of people are riding personal watercraft (jet skis) on a large body of water. The water is choppy, and the riders are wearing life jackets. In the background, there is a bridge and some hills. The overall scene is a recreational water activity.

- 54% male, 46% female
- 79% white, 11% Hispanic
- 66% under 35
- Favored in the Midwest & South

Estimated ratios of percentage of participants to percentage of total population for outdoor activities by race & country.

Group	Walking	Swimming Outdoors	Hiking	Motor Boating	Downhill Skiing	Big Game Hunting
Percent of Total Population	83.8	43.8	33.4	24.4	8.3	8.2
Race/Ethnicity						
White	1.02	1.15	1.03	1.25	1.20	1.28
Black	1.00	0.49	0.34	0.34	0.33	0.27
American Indian	1.00	1.00	1.14	1.14	1.57	2.00
Asian/ PI	1.08	0.92	0.96	0.54	1.46	0.23
Hispanic	0.88	0.75	1.42	0.50	0.55	0.43
Place of Birth						
United States	1.02	1.04	0.93	1.06	1.05	1.07
Another Country	0.81	0.56	1.67	0.37	0.44	0.30

Estimated ratios of percentage of participants to percentage of total population for outdoor activities by age & income.

Group	Walking	Swimming Outdoors	Hiking	Motor Boating	Downhill Skiing	Big Game Hunting
Percent of Total Population	83.8	43.8	33.4	24.4	8.3	8.2
Age						
16-24	1.02	1.37	1.11	1.24	1.89	1.17
25-34	1.01	1.21	1.20	1.16	1.32	1.25
35-44	1.03	1.19	1.21	1.15	1.14	1.13
45-54	1.01	0.99	1.04	1.00	0.78	0.99
55-64	0.98	0.68	0.78	0.81	0.32	0.82
65+	0.94	0.37	0.55	0.51	0.12	0.54
Income						
<\$15,000	0.91	0.62	0.88	0.57	0.48	0.38
\$15,000-\$24,999	0.98	0.79	0.98	0.63	0.41	0.81
\$25,000-\$49,000	1.02	1.10	1.04	1.07	0.75	1.31
\$50,000-\$74,999	1.08	1.28	1.11	1.36	1.17	1.38
\$75,000-\$99,999	1.09	1.39	1.20	1.59	1.86	1.21
\$100,000+	1.09	1.43	1.29	1.67	2.76	1.09

***BEING MORE
EFFECTIVE IN
OUTREACH,
LISTENING, AND
INFORMING***

**The Urban
Beach Boys
(3.8%)**

**The Inactives
(22.0%)**

**Young
New England
Wind Surfers
(0.9%)**

Segmenting for more effective communication and education

**Nature
Lovers
(27.2%)**

**The Noreaster
Musclers (6.2%)**

**The Thrill
Seekers (8.3%)**

**Hunt-n-Fish
Men's Motor Club
(6.3%)**

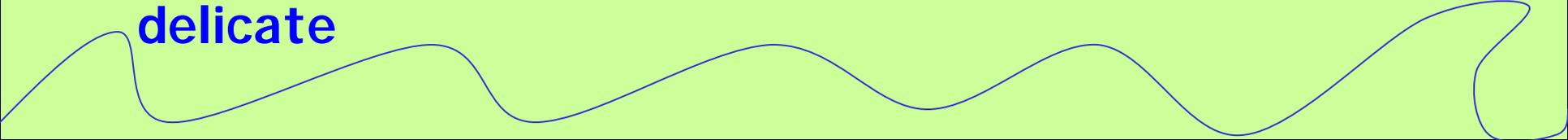
**The Take it Easies
(25.3%)**

Hunt-n-Fish Men's Motor Club (6.3%)



- Hunt, fish, motorized, camp, **motorboat (53%), canoe**
- Don't participate in beach activities or much in viewing/learning
- 88% male, 90% white, under 45, U.S. born, much more rural, Prairie & Southern
- Belong to wildlife conservation group, read nature magazines, woodworking, own a business, garden, have pets & do home improvements
- Humans were meant to rule over the earth & environmental crisis is exaggerated

The Urban Beach Boys (3.8%)

- ⌘ Diving, Surfing, Snorkeling, Kayaking, Sailing, Backpacking, Snowboarding, Saltwater Fishing, Water Skiing, Jet Skiing. more active than most people in most activities, except hunting
 - ⌘ Two-thirds white, Asian/Pacific Islanders well represented, majority under 35, U.S. born, & urban
 - ⌘ South Atlantic & Pacific Coast
 - ⌘ Regularly go to movies, use internet at home, participate in environmental groups, invest, & attend classes, involved as a youth volunteer, into the arts
 - ⌘ Feel humans are abusing the earth, we're on a course for ecological catastrophe & the balance of nature is delicate
- 

Young New England Wind Surfers (0.9%)



- ▲ Windsurfing (71%), surfing, kayaking (48%), sailing (68%), non-motorized winter activities, diving, snorkeling, rowing (28%) & canoeing (55%)
- ▲ More active than most Americans in all activities, including water & jet skiing
- ▲ >85% white; 2/3's male; ½ under 25; urban, U.S. born
- ▲ New England & Pacific Coast strongly represented
- ▲ Into movies, lifelong learning classes, participate with environmental groups, regularly attend movies, belong to country club, use internet & into the stock market
- ▲ Strongly believe environmental crisis is greatly exaggerated, though we are nearing the earth's limits



The Noreaster Musclers (6.2%)

- Cross-country skiing, rowing (31%), kayaking (28%), canoeing (53%), downhill skiing, sailing (25%), hiking, visiting a wilderness, backpacking, snowboarding, bicycling & fishing
- They don't hunt, but are active in most other activities
- Somewhat more male than female, white & Asian/Pacific Islander, young to middle aged, urban, from New England, Prairie, Mountain & Pacific states
- Members of conservation groups, use internet at home, attend concerts, have vacation property, invest, belong to country club
- More belief that we are abusing the earth, the balance of nature is delicate & may be heading for disaster

The Thrill Seekers (8.3%)



-  Waterskiing (62%), jet skiing (68%), rafting (46%), snowmobiling, snowboarding, motorboating (83%), downhill skiing, driving off-road, rowing & canoeing
-  Very active across a large number of activities
-  Equally male/female, white & American Indians well represented, two thirds under 35, almost all born in the U.S., from Plains states
-  Youth volunteers, belong to a country club, use the internet, attend movies, watch sports on TV, gather with friends & neighbors
-  Balance of nature is delicate, humans are abusing the earth, & a disaster is looming

SUMMARY POINTS

- Society has changed dramatically in the last few decades, & it shows up in our outdoor recreation
- Outdoor recreation is growing & diversifying as a part of Americans' lifestyles, almost everyone is involved at some level
- Walking, birding, hiking, swimming are at the top of the activity growth list, not far behind is motor boating

SUMMARY CONTINUED

- Population will continue its rapid growth with some groups literally exploding in numbers
- Increasingly women, Asian/Pacific Islander, Hispanic, older & urban people participating. OR is still very much a white male pursuit
- Indicators point to rise of outdoor recreation & more demands on water resources
- People are showing strong concern for the environment & its water resources
- Need to be smart about outreach & education strategies

NSRE 2005

- **Sponsors, Partners, Working group, etc**
- **Sponsoring surveys, modules, questions**
- **Individual reports, by State, activity, demographics**
- **Contact ggreen@fs.fed.us**



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