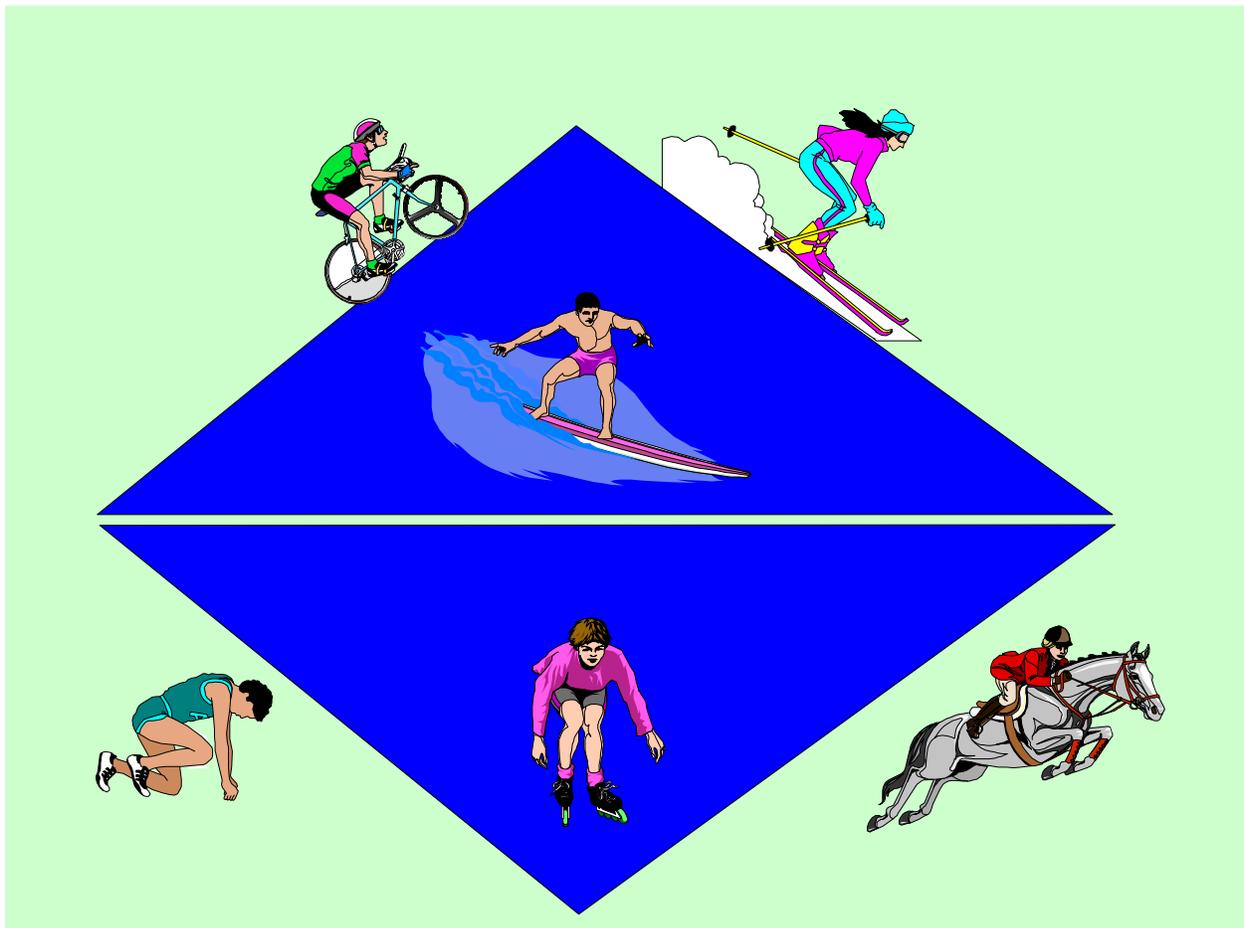


# CHAPTER 3: THE ENTHUSIASTS



Patterns of participation in outdoor recreation are similar to those for many human activities. When people find something they really like, they do it often. As a result, the most active participants account for a majority of the participation in outdoor recreation activities. These participants are the enthusiasts. Enthusiasts are defined for this report as the most active one-third of participants in each activity. In this chapter, the focus is on enthusiasts of human powered outdoor recreation.

For suppliers of outdoor recreation equipment and services, the importance of enthusiasts is obvious. Enthusiasts account for a large share of sales, and in particular may represent a greater percentage of repeat or upgrade sales. Knowing the characteristics of enthusiasts will help marketers direct advertising to them, and to others with similar characteristics who might be budding enthusiasts.

Enthusiasts dominate the outdoor recreation market. The most enthusiastic one-third account for much higher proportions of total activity—a range from 58 percent for caving to 92 percent for wildlife viewing (table 3.1). What this means is that the most active one-third of the people who report that they viewed wildlife in the past year account for 92% of the total days spent wildlife viewing. From table 3.1, it is clear that enthusiasts account for most of America’s outdoor recreation participation. On the average, between 70 percent and 80 percent of all outdoor recreation activity can be attributed to the top one-third of participants. Although table 3.1 shows the percentage of participation and number of days for enthusiasts of all activities, the majority of

the discussion in this chapter will focus on human powered enthusiasts.<sup>1</sup>

For each activity, however, there is a good deal of variation in how many participants are enthusiasts. Only 0.9 percent of the U.S. population are enthusiast cross-country skiers. Compare this with enthusiast walkers, which make up 21 percent of the population (table 3.1). It seems that the more specialized activities have fewer enthusiasts, but those enthusiasts still account for the vast majority of participation within each activity. For example, less than 2 percent of the U.S. population are mountain climbing, rock climbing, or caving enthusiasts, but those small percentages still account for the majority of participation within each activity.

For human powered activities, walking is the only activity for which enthusiasts account for over 10 percent of the U.S. population. Seven percent of the U.S. population are hiking enthusiasts, about equal with the number of biking enthusiasts nationwide. Marketing to enthusiasts of human powered activities is, on the whole, a specialized area that can be focused on the relatively few enthusiasts who represent the majority of participation.

### **Characteristics of Enthusiasts**

Within human powered outdoor recreation activities, enthusiasts are young— most are under 40 years old (table 3.2). An exception to this is walking, for which one in four enthusiasts are over 60 years old. For

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<sup>1</sup>For participation information for all human powered outdoor recreation participants, refer to the tables in chapter 5.

outdoor adventure human powered activities, such as hiking, backpacking, and rock and mountain climbing, a large percentage of participants are between 16 and 24 years old. We will see later that many of these young enthusiasts may also still live with their parents—an important characteristic to consider when marketing to this group. Human powered boating enthusiasts also tend to be young. It should be noted, however, that somewhere around one-fourth of human powered outdoor recreation enthusiasts are between 30 and 39 years old. This market segment is important because between the ages of 30 and 39, participants may be better established financially and therefore better able to afford specialized outdoor recreation equipment and services.

The overwhelming majority of outdoor recreation enthusiasts are Caucasian (table 3.3). Because the majority of the U.S. population is Caucasian, it is easy to forget that minority cultures also participate in outdoor recreation in the millions. They also represent a small but important percentage of the enthusiasts. For example, almost 14 percent of biking enthusiasts are minorities, and 15 percent of all walking enthusiasts are minorities. These enthusiasts represent emerging markets for the human powered outdoor recreation industry, as the percentage of minorities in the U.S. population grows and is expected to continue growing into the 21<sup>st</sup> century.

Enthusiasts are slightly more likely to be men than women, although a significant number of women are enthusiasts (table 3.4). For example, men and women are rafting enthusiasts in almost equal numbers, and women biking, rowing, and sailing

enthusiasts comprise over 40 percent of those participants. In sharp contrast, about seven out of ten outdoor adventure enthusiasts are men. More women than men are walking enthusiasts, however, representing over 60 percent of those participants.

On the average, enthusiasts have household incomes of between \$25,000 and \$75,000 (table 3.5). There are a few exceptions to this, but the overwhelming majority of enthusiasts, including human powered enthusiasts, can be considered upper-middle to middle class. This is an important consideration for the marketing of outdoor recreation equipment and services. Considering the young age of many human powered outdoor recreation enthusiasts, this income range is of interest. For some of these activities, about one in four enthusiasts have lower incomes. For example, between 22 and 27 percent of biking, walking, rowing, hiking, and backpacking enthusiasts have incomes below \$25,000.

Over one quarter of outdoor recreation enthusiasts live in two-person households (table 3.6). Over two-thirds of biking enthusiasts live in households of between two and four people, suggesting biking's popularity as a household activity. Other activities for which enthusiasts tend to come from households of between two and four people include downhill skiing, camping, fishing, many forms of boating, and swimming. For outdoor adventure activities, enthusiasts seem to be more likely to come from households of between two and three members.

For many human powered outdoor recreation activities, enthusiasts live in

households with four or more family members (table 3.7). One explanation for this may be the recent trend of more young people under age 25 to live at home with parents past high school. For some activities, enthusiasts seem to be somewhat likely to live alone, such as for kayaking (50 percent), and for outdoor adventure activities (about one-third).

Outdoor recreation enthusiasts are well educated (table 3.8). Between one-third and 60 percent of human powered enthusiasts are college educated. Another 20 to 30 percent have post-secondary education experience. This is an important factor to consider when marketing to enthusiast markets. They are obviously a highly literate group, and marketing targeted to this group should reflect their higher-than-average education level.

### **Marketing for Human Powered Outdoor Recreation Enthusiasts**

Enthusiasts represent a special market segment for the outdoor recreation industry. Enthusiasts participate more frequently than most in particular activities, and therefore have differing needs for outdoor recreation equipment and services. They are more likely to buy replacement equipment, especially for equipment with a limited life span. For example, enthusiast walkers and hikers will need to replace their footwear more often than non-enthusiasts. Enthusiasts are also more likely to upgrade their equipment as new technology is introduced. Lighter, stronger, or better performing materials, such as improved metal alloys in off-road bicycles, are likely to attract the attention of enthusiasts. Since enthusiasts are well educated, they are likely to

investigate the claims of equipment manufacturers, and to appreciate technological improvements. They may subscribe to specialist publications, and such publications offer an opportunity to promote new and improved equipment and services to outdoor recreation enthusiasts.

Outdoor recreation enthusiasts represent a small proportion of the total number of participants in each activity— but they also represent a majority of the total number of days of participation in each activity. The current participation profile of the human powered outdoor recreation enthusiast indicates a particular marketing strategy for the industry. It also suggests a number of areas in which marketing may expand. The outdoor industry, therefore, may want to look closely at:

1. The increasing number of women participating in all forms of outdoor recreation. As equipment becomes lighter in weight and improves in performance, more women are likely to participate in technology-driven activities. For example, as boats become lighter and stronger, more women are likely to join the ranks of canoers and kayakers. The continuing increase in women's participation in team sports will also likely influence their participation in all activities, including all human powered outdoor recreation activities.
2. Minority participation in outdoor recreation. As the proportion of minorities grows in the 21<sup>st</sup> century, their participation in outdoor recreation will also increase. It is interesting to note that although outdoor recreation marketing has not particularly focused on

minority participation, a substantial number of minorities participate in a variety of outdoor recreation activities. Marketing efforts aimed at minority participation may further boost the number of non-Caucasian enthusiasts.

3. The aging of the current enthusiast population. As the current generation of enthusiasts enters their 40s and 50s, they will probably want to continue to remain active in outdoor recreation. With the aid of technology and the trend toward better health and fitness for older adults, current enthusiasts should remain active as they grow older. Outdoor recreation equipment development and marketing should continue to cater to these enthusiasts. As they grow older, they will likely have greater incomes and willingness to allocate their resources toward continued participation.
4. Interest in viewing and learning activities. Outdoor recreation enthusiasts are well educated. As they age, they will likely want to continue learning about their favorite activities and the natural environment in which they recreate. Education-oriented outdoor recreation equipment, such as binoculars, field guides, and cameras, will likely supplement and add value to the enthusiasts' experiences as they seek to learn more about and document their outdoor recreation experiences.

5. Singles, couples, and family participants. The tables suggest that many human powered outdoor recreation participants are either single and living alone or living with parents. The tables also suggest that many human powered participants are currently in their 30s. Perhaps in the near future, outdoor recreation marketing for human powered activities should focus on both the single lifestyle and the young professional lifestyle.

### **Using the Tables**

The following tables provide specific information about outdoor recreation enthusiasts. They can provide a specific enthusiast profile for an activity or a group of related activities. When using the tables, it is always important to look at related activities for comparative information. It is also prudent to remember that the enthusiasts represent a small but vitally important market segment, and that their needs, interests, and consumer patterns will likely be different than for the less specialized outdoor recreation participant.