

## EXECUTIVE SUMMARY

In 1994 and 1995, the National Survey of Recreation and the Environment (NSRE) was accomplished by interviewing approximately 17,000 Americans over age 15 in random-digit-dialing telephone samplings. The primary purpose was to learn about the outdoor recreation activities of people over age 15 in the United States. They were asked about their participation in 62 specific recreation activities.

### **Human Powered Outdoor Recreation: The Enthusiasts**

The Outdoor Products Council of the Sporting Goods Manufacturers Association, an NSRE sponsor, is interested in the participation patterns of individuals in human powered outdoor recreation. Activities such as hiking, canoeing and kayaking, mountain climbing, and bicycling, are included in this category. Much of this report focuses specifically on the activity patterns of individuals who reported the highest rates of participation in one or more human powered outdoor recreation activities. Enthusiasts, as defined for this report by the Outdoor Recreation Coalition of America and the study's analysts, comprise the most active one-third of participants in human powered outdoor recreation. Enthusiasts account for a large majority of outdoor recreation participation, even though their numbers are relatively small. Most outdoor recreation enthusiasts, and human powered enthusiasts in particular, are either under 25 years of age or in their 30s. They are well educated. Although most of them are men, many women are outdoor enthusiasts as well.

### **Human Powered Outdoor Recreation: Market Segments**

One of the most important results of the NSRE is the division of the U.S. population into groups with similar recreation interests. Very often people that share an interest in one recreation activity also share interests in others. Therefore, individuals who participate in human powered outdoor recreation also participate in other types of outdoor recreation. Seven interest patterns were identified. The separate patterns suggest that people in different segments are seeking different kinds of experiences from outdoor recreation. The groupings, therefore, should be meaningful for marketing of outdoor recreation services and equipment. The seven identified market segments were Sports Hogs, Fitness Buffs, Nature Lovers, Fishin' and Huntin' Avids, the Bass Club, Passives, and Do Nothings.

Sports Hogs like individual sports, team sports, winter sports, horseback riding, boating of all kinds, swimming, snorkeling, and watching outdoor sports events and concerts. There are 19.6 million Sports Hogs in the country. They like many activities, and they pursue them with gusto. They are among the best customers for sporting goods and outdoor equipment manufacturers

Fitness Buffs enjoy running, walking, biking, hiking, and swimming. There are 21.8 million of them. Findings suggest that they engage in a wide range of activities, and that they have the income to enjoy them. This segment also represents important customers

for sporting goods manufacturers and retailers.

Among the favorite activities of Nature Lovers are walking, birdwatching, wildlife and fish viewing, nature study, sightseeing, and going to visitor centers. About 26.6 million Americans over age 15 are Nature Lovers. They like quiet activities in natural settings. About two-thirds of them are women.

Fishin' and Huntin' Avids share interests in fishing, camping, group activities, walking, and hiking. They enjoy nature, but their interest leans toward use of wildlife and fish rather than toward viewing and understanding alone. Fifty-eight percent of this group is male.

Members of the Bass Club also love to fish, but they are not as enthusiastic about other activities as members of the preceding group.

Passives visit the outdoors for sightseeing, enjoyment of beaches, picnicking, getting together with family and friends, and walking. They seldom engage in more vigorous pursuits. There are 43.8 million Passive Americans over age 15. As one might expect, a large number are over 55 years old, but a surprising 17 percent are 16-24. Twenty-four percent of Passives are minority group members.

Do Nothings are the largest group (45.7 million) of Americans over age 15. Their rates of participation in all outdoor recreation activities are extremely low.

The human powered outdoor recreation market is discussed from the perspective of the seven distinct market segments identified

in the NSRE. For example, individuals involved in sports and those involved in fitness activities represent two prominent and distinct market segments of human powered outdoor recreation participation. Individuals involved in sports tend to be more social, and they are more interested in mastery—winning appears to be a primary motivator for these individuals. In addition to active participation, this group also likes to attend outdoor sporting events. Fitness participants, on the other hand, are interested in health and personal improvement. They enjoy outdoor learning activities of all types. Human powered outdoor recreation participation is therefore found in most of the seven segments, but in differing forms and frequencies. As such, this market segmentation should provide opportunities for the outdoor industry to tailor its marketing, and to more effectively allocate its marketing investment.

### **Mass Markets in Outdoor Recreation**

Results show that 94.5 percent of Americans participated in at least one of the surveyed forms of outdoor recreation in 1994. That percentage translates into 189 million participants nationwide. Walking is the single most popular activity, with about 134 million participants. Other activities with over 100 million participants include visiting a beach, gathering outdoors with the family, and sightseeing.

Activities with 60 to 99 million participants include picnicking, visiting a nature center, visiting a historic site, playing yard games, attending sporting events, outdoor pool swimming, other outdoor swimming, visiting a visitor center, and wildlife viewing. Those with 40 to 60 million participants are

boating, skiing, birdwatching, fishing, hiking, water-based nature study, running or jogging, and motorboating. Activities with 25 to 40 million participants are developed-area camping, visiting a prehistoric site, volleyball, off-road driving, softball, warmwater fishing, golf, primitive-area camping, fish viewing, and basketball.

A wide range of activities ranging from tennis to surfboarding and windsurfing attracted less than 25 million participants. Even windsurfing, the least popular of all the activities listed, attracted more than 2 million participants. Thus, there are mass markets for over 60 individual recreation activities. Many activities with less than 25 million participants—such as caving and mountain climbing—require specialized equipment and training.

### **Outdoor Recreation Trends Since 1982**

Since 1982, the population of the nation has increased and the proportion of people participating in at least one activity has risen from 89 to 94.5 percent. As a result, numbers of participants have increased for almost all activities.

In addition, in the 1994 survey a greater variety of activities were included because of their growing popularity. These activities include orienteering, mountain climbing, rock climbing, caving, and specific kinds of nature viewing. Since 1994, more such specialized activities have become more visible. Future surveys should anticipate this growing trend toward specialized outdoor activities.

### **Marketing Data on Outdoor Recreation Participants**

To assist with the marketing of individual recreation activities, various characteristics of the participants in individual activities and groups of activities were tabulated. These characteristics include distributions by age, income, race, sex, size of household, and number of cars in the household.

As one might expect, participation in activities requiring vigorous exercise is considerably higher for young and middle-aged people than for those over 60. Considerable numbers of people over 60 are participants, however. Many of these older people have greater time to recreate because they are retired, and interest in maintaining physical fitness is growing for people of all ages.

For most activities, participation is low for people with family incomes below \$25,000 per year. Interestingly, it often is also low for people with incomes above \$100,000. Participation is highest for people with family incomes between \$25,000 and \$75,000 per year. It appears, therefore, that many outdoor recreation activities are enjoyed primarily by the middle class.

Participation in team sports is greater for African-Americans than for people in other racial groups. For many, camping is a traditional family activity, and participation increases as family size increases.

### **Constraints**

People were asked if they felt constrained in their participation in outdoor recreation activities. Lack of time and money were

most frequently mentioned. A lack of people to do activities with suggests that many people might be attracted to recreate by providing compatible groups for them to join. Inadequate information was also cited. Adequate information probably has been compiled, but systems for distributing the information often fail. Concerns about personal safety were often expressed by Nature Lovers, who are predominantly female, and Do Nothings, who are predominantly over 50 years old and many of whom are minority group members.

### **Detailed Tables**

Probably the most important NSRE results are detailed tables that show rates of participation in individual activities and groups of activities. They also show distributions of participants by age, income, sex, race, and size of household. Relevant tables are located following the text in each chapter.