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The Recreation Roundtable
1225 New York Avenue, NW
Washington, D.C. 20005

**Outdoor Recreation
In America 1999:
The Family and the
Environment[®]**

**R O P E R
S T A R C H**

TURNING DATA INTO INTELLIGENCE WORLDWIDESM

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Introduction

This is the sixth annual national survey performed for The Recreation Roundtable. The study has two purposes:

- To investigate Americans' participation in and general attitudes toward outdoor recreation in the broadest sense.
- To determine Americans' attitudes toward the relationship between outdoor recreation and the environment.

The study is based on 2,000 in-person interviews with Americans 18 and older conducted in their homes during the period of June 19 to July 5, 1999. This is a representative sample of the American adult population.

Outdoor recreation is defined here as leisure activities involving the enjoyment and use of natural resources. Included among the 36 outdoor recreation activities presented to respondents are pursuits ranging from popular forms such as walking, swimming, and running, to other less-prevalent activities such as nature photography, sailing, and snowmobiling.

Summary

The 1999 Recreation Roundtable study focuses on two primary issues related to outdoor recreation in society. One is the relationship between outdoor recreation and the public generally, and with particular emphasis on family life. The second is the relationship between outdoor recreation and the environment. Namely, to what extent does recreation have a positive or negative impact on environmental protection? Is outdoor recreation a potentially harmful "extractive industry" like mining, logging or ranching? Or, is outdoor recreation an ideal way to encourage and develop stronger environmental attitudes and behaviors?

The following is a summary of the key findings from this report.

- More Americans are participating in outdoor recreation on a monthly basis. The data show a steady increase since 1994 and recent jump since 1998 in the percentage of Americans who recreate at least once a month. This is good news for companies in the recreation industry as the growing number of recreationists means a growing number of consumers and patrons.
- For Americans today, the most important reasons to recreate are fun, fitness and family time. Recreation drivers have not changed significantly in order of importance. However, there has been a considerably increase in the percentage of Americans saying many aspects of outdoor recreation are "important" reasons to participate suggesting that Americans are more likely today than five years ago to see the benefits of outdoor activities.
- Many families use outdoor recreation as a way to form bonds and transfer important values to children. A sizable number of Americans feel recreation strengthens the family as a unit and the children as individuals.
- While environmental concern across the nation peaked a decade ago, it is still "top of mind" when considering national problems. Perhaps most importantly, many of the specific environmental problems viewed as most serious affect recreation.
- Many Americans see recreation as one of the main reasons to protect the environment. Indeed, a sizable number say the key driver for environment protection is to "preserve recreation areas and national parks."
- While Americans are concerned about the environment, they do not think the answer to environmental protection is forbidding the use of public lands. In fact, nearly two in three Americans say outdoor recreation, overall, has a "good effect" on the environment. More than three quarters of the public say outdoor activities has either a "good effect" or "no effect." Americans who consider outdoor activity a detriment to the environment may avoid it or discourage others from doing it. This suggests a need for the recreation industry to communicate with the public about the actual effects of outdoor recreation on the environment.
- Many Americans think the key to environmentally safe recreation is responsible behavior. In addition, nearly nine in ten say outdoor recreation benefits the environment because it gives people a reason to care about environmental protection. The same number say that if people would follow the rules in parks and recreation areas, there would be no significant effects of their land use on the environment.
- A proprietary Roper environmental segmentation demonstrates clearly that a linkage exists between pro-environmental activism and high levels of outdoor recreation participation. The one in ten most environmentally active Americans also are the most involved personally in and supportive of outdoor recreation.

PART 1: AMERICANS' ATTITUDES TOWARD OUTDOOR RECREATION: A HISTORICAL PERSPECTIVE

Trends such as the frequency of outdoor recreation and the role of recreation in Americans' daily lives, can affect companies in industries from lodging providers to outdoor clothiers. The following piece of this report will describe how often Americans are recreating, reasons why they participate and the role recreation plays in the family.

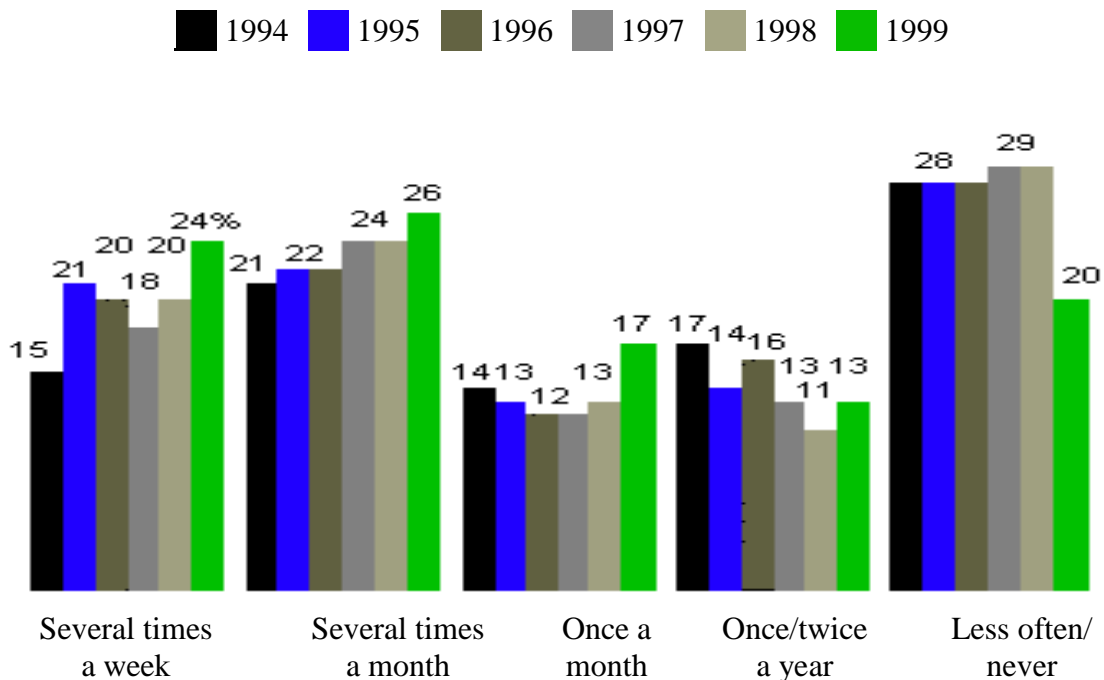
SECTION 1: AMERICANS' PARTICIPATION IN OUTDOOR RECREATION

More Americans Participating in Outdoor Recreation At Least Monthly

Results of the 1999 Recreation Roundtable study show outdoor activities on the rise. The number who engage in outdoor recreation *at least* once a month has increased 10 points to 67% in the past year. Nearly a quarter of the public (24%) recreate "several times a week," 4 points higher than in 1998 and 9 points higher than the first Recreation Roundtable study fielded in 1994. Likewise, the number who recreate "several times a month" is up moderately compared to last year (up 2 points) and significantly compared to 1994 (up 5 points). Every year since 1994, nearly three in ten Americans said they participated in outdoor recreation "less than once a year" or "never;" however, this year that number drops to two in ten.

This year's increase in outdoor recreation frequency is a logical continuation of a steady rise that we have seen throughout the 1990s. However, the large jump exhibited since last year may be indicative of the fact that this year's Recreation Roundtable study was conducted during the latter part of the summer - a time of great outdoor activity.

How Often Americans Participate In Outdoor Recreation



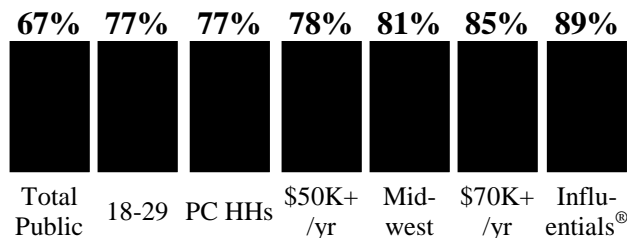
Who's Recreating Most?

Young adults and Americans with annual household incomes of \$50,000 or more are more inclined than the total public to engage in outdoor activity frequently. Indeed, more than three-quarter of both these groups (77% and 78%, respectively) participate in outdoor recreation at least monthly, versus 67% of all Americans. As well, 77% of personal computer owners come out from behind their monitors for some time outdoors at least once a month.

Frequency of outdoor activity appears to increase as household income increases. Eighty-five percent of Americans with annual incomes of \$75,000 or more recreate at least monthly, 7 points higher than \$50,000-plus households. Influential Americans, the most socially and politically active group in the nation, are the most recreationally active. Nearly nine in ten of this group recreate at least monthly (89%).

Who's Engaging In Outdoor Recreation Most Often

% saying they engage in outdoor activity at least monthly



Outdoor Recreation Moves Into "Middle America"

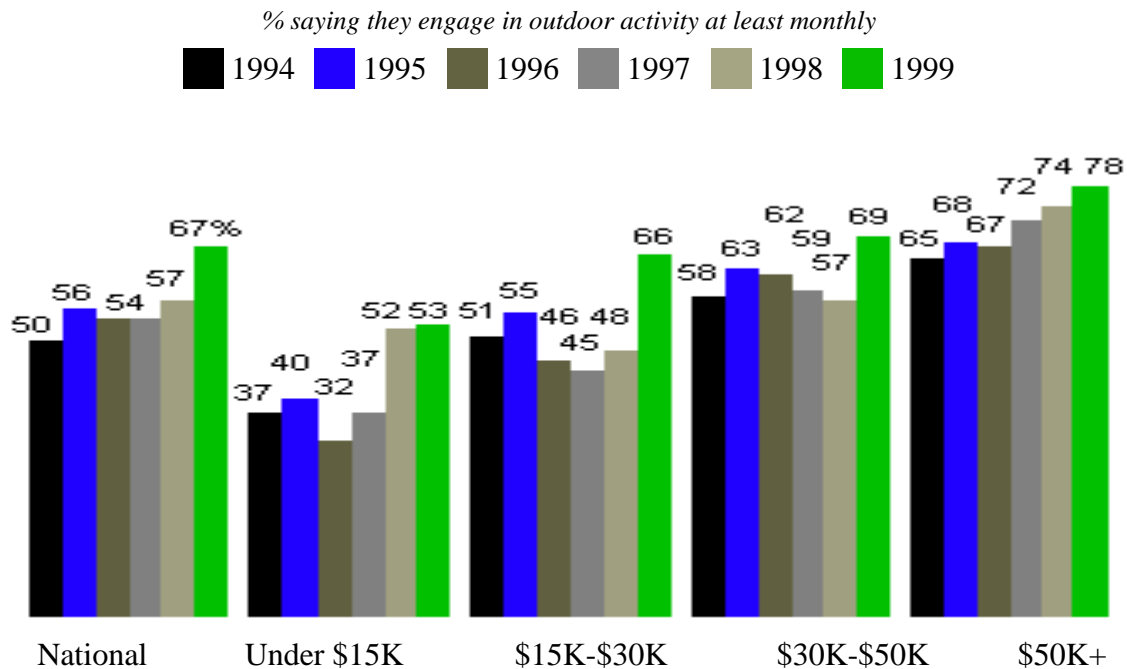
A look at Recreation Roundtable results since 1994 shows Americans in households of \$50,000 or more have always been more frequent recreationists than their counterparts. This year, more than three in four of this group (78%) spend time in an outdoor activity at least monthly, compared to 69% of those with incomes between \$30,000 and \$49,999, 66% of those with incomes between \$15,000 and \$29,999 and 53% of those making less than \$15,000 a year.

While affluent Americans are doing their part to contribute to the overall increase in outdoor recreation frequency (up 4 points since 1998), it's middle income families who are driving this trend. Americans in households with incomes between \$15,000 and \$29,999 have shown an increase of 18 points since last year in the number recreating at least monthly. Two-thirds of this group participate in outdoor activity on a monthly basis, up from 48% in 1998.

In keeping with the theme of outdoor recreation in "Middle America," Americans in the Midwest have also shown a significant increase since last year in outdoor recreation participation. More than eight in ten (81%) say they participate in outdoor recreation at least monthly, up from 66% last year.

Affluent Americans Are Most Active But, Outdoor Recreation Moving Into "Middle America"

How Often Americans Participate In Outdoor Recreation



Participation in Specific Recreational Activities

Despite the increase in the number of Americans participating in outdoor activities frequently, there have been few changes in the specific activities Americans are doing. The five most popular activities this year: walking (42%), swimming (40%), driving for pleasure (35%) picnicking (32%) and fishing (28%) have been the top activities for the past five years. The only change in order among these activities is swimming's move from third to second place, driven by a 7-point increase since last year. The following are other key findings from this year's study.

- Walking (42%, down 5 since 1998) and driving for pleasure (35%, down 4) have declined somewhat.
- More Americans are embracing the "great outdoors" by fishing (28%, up 6 since 1998) and campground camping (21%, up 6).
- The popularity of swimming is at an all-time high.
- Many activities show slight - but not statistically significant - increases in participation during the past year. Some examples are:
 - Boating/rowing activities - Motor boating (11%, up 2), canoeing/kayaking (7%, up 2), and water-skiing (6%, up 2)
 - "Extreme" sports - Mountain biking (6%, up 2) and snowboarding (3%, up 2)
 - Activities using recreation vehicles - RV camping (9%, up 2) and motorcycling (6%, up 2)

Outdoor Recreation Participation During Past Year

% who have participated in during past year

	1994	1995	1996	1997	1998	1999	Pt. change since 1998
	%	%	%	%	%	%	%
Walking for fitness/recreation	NA	45	39	42	47	42	-5
Driving for pleasure	40	36	33	34	39	35	-4
Swimming	35	31	28	31	33	40	+7
Picnicking	33	29	24	26	30	32	+2
Fishing	26	24	22	20	22	28	+6
Bicycling	21	20	16	19	19	22	+3
Visiting cultural sites	NA	NA	12	14	18	16	-2
Hiking	18	18	12	15	17	15	-2
Wildlife viewing	18	15	10	14	16	15	-1
Running/jogging	19	16	13	12	16	16	--
Outdoor photography	15	15	10	13	15	12	-3
Campground camping	16	16	12	12	15	21	+6
Golf	11	12	11	11	12	12	--
Bird watching	14	11	8	11	10	11	+1
Back packing	13	12	8	7	10	10	--
Motor boating	10	9	5	8	9	11	+2
RV camping	8	8	6	7	7	9	+2
Hunting	8	7	7	5	7	8	+1
Off road vehicle driving	5	5	5	5	7	7	--
In-line skating	NA	4	4	5	6	5	-1
Tennis	9	9	7	8	5	6	+1
Downhill skiing	6	6	5	5	5	4	-1
Canoeing/kayaking	6	5	4	5	5	7	+2
Target shooting	8	6	5	4	5	7	+2
Personal water craft (e.g. jet skis)	NA	NA	NA	3	5	5	--
Motorcycling	7	5	6	4	4	6	+2
Horseback riding	6	5	5	4	4	6	+2
Mountain biking	5	5	4	4	4	6	+2
Water-skiing	6	6	3	4	4	6	+2
Rock climbing	4	4	3	3	4	3	-1
Sailing	4	3	3	3	2	3	+1
Snorkeling/Scuba diving	4	3	3	3	3	4	+1
Cross-country skiing	2	3	2	2	2	1	-1
Snowmobiling	2	3	2	1	2	2	--
Rowing	3	2	1	2	1	1	--
Snowboarding	NA	NA	NA	NA	1	3	+2

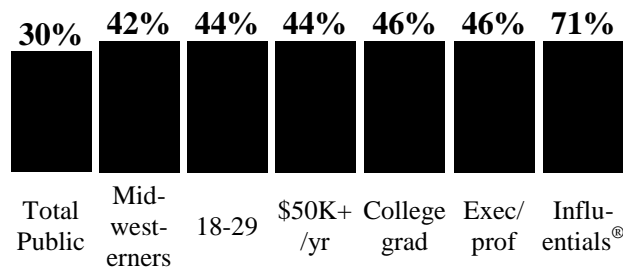
(NA) denotes not asked

Influential Americans Do Greatest Variety of Activities

Roper data show many Americans are multi-talented - or at least have varied recreational interests. Three in ten of the total public (30%) have done at least six different activities in the past twelve months. This percentage increases by roughly half for Midwesterners (42%), 18-29 year olds (44%), \$50,000-plus households (44%), college graduates (46%) and Executive/professionals (46%). Influential Americans (71%) are more than twice as likely as all Americans to have done six or more activities in the past year.

Influentials[®] Most Apt To Do A Variety Of Recreational Activities

% saying they have participated in six or more of the activities about which they were asked



Most Important Reasons to Participate in Outdoor Recreation













Fun, fitness and family are top on the list of reasons Americans participate in outdoor activities. When asked to rate the importance of certain recreational aspects, 83% of Americans rate "fun" as an important factor. But health and fitness aspects like "relaxation" (80%) and "health and exercise" (79%) are not far behind. Family togetherness receives a high rating. Nearly three in four Americans name this as an important reason to get active (74%). Clearly, many American families participate in outdoor recreation as a way to bond.

As further evidence of Americans' tendency to link outdoor recreation with family bonding, "being with family" is seen as a slightly more important reason to do outdoor activities than "being with friends" (63%). "Being with friends" is a bigger driver of outdoor recreation than is "being alone" (39%) or "for competition" (26%).

Perhaps most noteworthy is the fact that Americans are seeing many aspects of outdoor recreation as more important reasons to participate. Over twelve trended reasons to get active, an average of 64% of Americans say they are important, up 10 points since 1995. "Fun" (up 13), "family" (up 13) and "nature" (up 14), in particular, have risen in importance since that time.

Most Important In Recreation: Fun, Fitness And Family

% saying is an important reason for participating in outdoor recreation*

			Pt. Diff From 1995
To have fun		83%	+13
For relaxation		80%	+12
For health and exercise		79%	+9
For the family to be together		74%	+13
To experience nature		73%	+14
To reduce stress		73%	+9
To teach good values to children		64%	+12
To be with friends		63%	+11
For excitement		59%	+11
To learn new skills		53%	+11
To be alone		39%	-1
For competition		26%	+2

* "Important" is defined as a "four" or "five" on a scale from "one" to "five" with "five" meaning "very important."

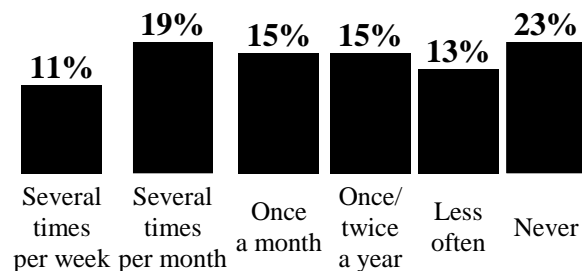
SECTION 2: OUTDOOR RECREATION AND THE FAMILY

Frequency of Family Time Outdoors

While many American families bond over the dinner table or in front of the TV, a sizable number do so through outdoor activity. Nearly half of all Americans (45%) say they "engage in outdoor recreation as a family" at least once a month, and over one in ten (11%) do so more than once a week. Clearly, for many Americans, camping, fishing or hitting a hiking trail is part of the daily household routine. These active families are balancing their participation in recreational activities with work, laundry, house cleaning and homework. Nearly a quarter of all Americans (23%) say they "never" do outdoor recreation as a family. Thirty-nine percent of those who "never" spend family time outdoors are 60 years or older and are apt to be empty-nesters.

How Often Family Time Is Spent Outdoors

% saying how often they "engage in outdoor recreation as a family"

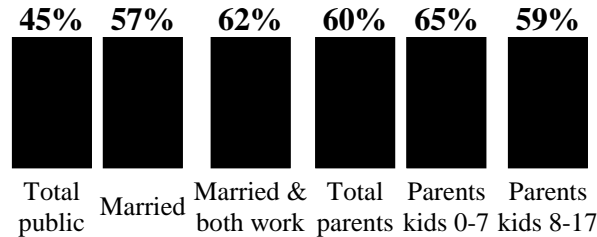


Who's Recreating As A Family Most?

Not surprisingly, married Americans and parents are the groups most apt to say they "engage in outdoor recreation as a family" at least monthly. Compared to the total public (45%), married Americans (57%) are 12 points more apt to be active at least monthly. Interestingly, this percentage increases - if only slightly - for those families in which both spouses work (62%) suggesting many families balance the responsibilities of two jobs and the home and still make time for an outing.

Families With Young Children "Play Together" Most Often

% saying they "engage in outdoor recreation as a family" at least monthly



Parents of young children are most inclined to frequently "play together" as a family. Indeed, 65% of parents with kids between the ages of 0 and 7 engage in outdoor recreation as a family once a month or more. This percentage drops six points for parents with children 8 to 17; still, it is noteworthy that 59% of Americans manage to engage their children in outdoor activity - even through their adolescent and teen years.

Other groups more apt than the total public (45%) to engage in outdoor recreation as a family at least monthly are:

- Americans between the ages of 30 and 44 (56%)
- Women between the ages of 18 and 49 (56%)
- Midwesterners (57%)
- Americans in households with annual incomes of \$50,000 or more (58%)
- Influentials® (62%)
- Americans in households with annual incomes of \$75,000 or more (64%)

Which Families Are Most Apt To "Play Together"?

% saying they "engage in outdoor recreation as a family" at least monthly



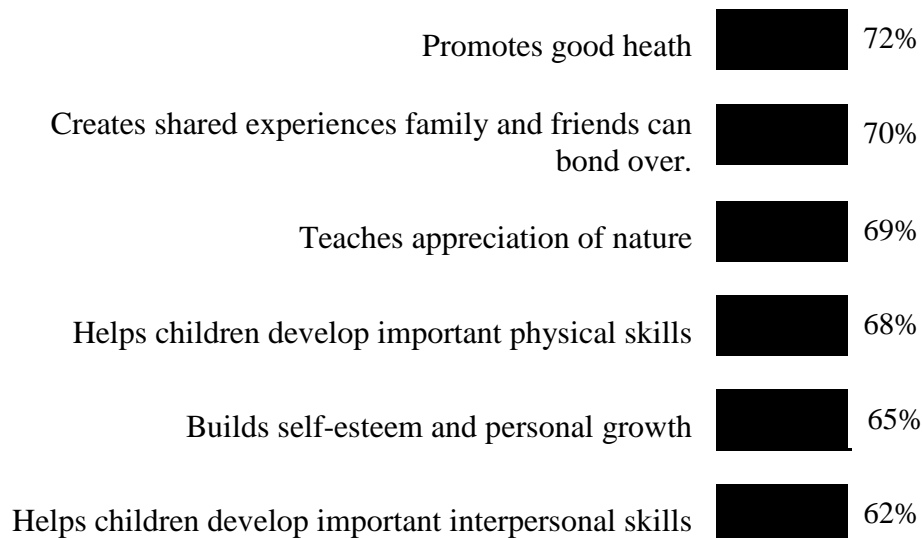
Reasons Outdoor Recreation May Benefit Children

Perhaps driven by their own fond memories of playing as children, Americans see a host of reasons why today's young people should engage in outdoor activities. When asked from a list of six possible benefits whether each is a major reason, minor reason or not a reason for children to take part in outdoor recreation, more than six in ten Americans said each was a "major reason." The benefit that comes out on top - if only by two points - is "promotes good health" (72%). Good health is followed closely by "creates shared experiences family and friends can bond over" (70%), further evidence that outdoor activities are seen as ways to bring people together literally and figuratively.

Nearly seven in ten Americans say the fact that outdoor recreation "teaches appreciation of nature" (69%) and "helps children develop important physical skills" (68%) makes them "major reasons" for kids to go out and play. More than six in ten Americans say recreation's ability to "build self-esteem and personal growth" (65%) and "help children develop important interpersonal skills" (62%) are the most important reasons to see children active.

Americans See Many Benefits Of Outdoor Recreation For Children

% saying item is a "major reason" for children to take part in outdoor recreation



SECTION 3: FEDERAL LAND USAGE

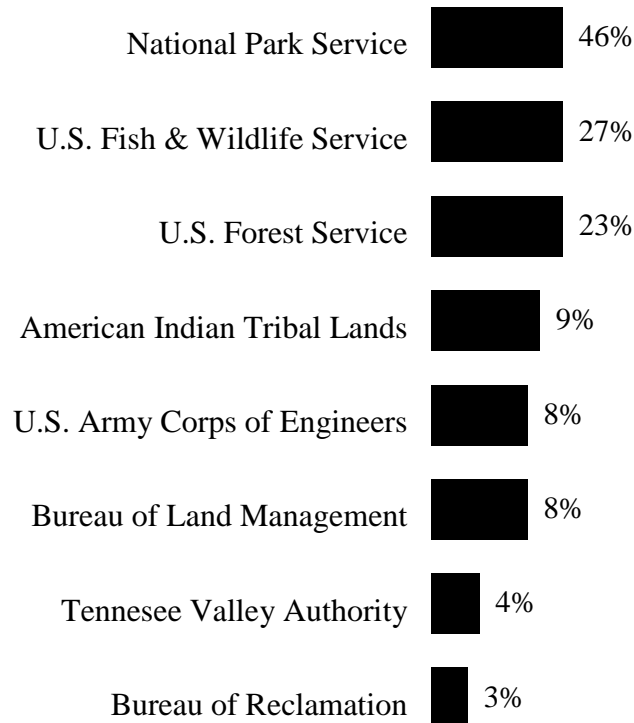
Use of Lands Managed By Specific Federal Agencies

When American recreationists head into the great outdoors, where do they go? Lands managed by the National Park Service remain most visited. Nearly half of all Americans say they have personally patronized National Park Service land during the past twelve months (46%), placing it far ahead of the second and third most popular lands, U.S. Fish and Wildlife Service lands (27%) and U.S. Forest Service lands (23%).

These data differ from actual numbers of visits as tabulated by these agencies. The likely reason is that the public does not understand the differences between lands managed by different agencies. They may, for example, believe they are in a National Park, while they are actually in a National Forest. In addition, Roper data show the number of visitors, whereas other data may show the number of visits.

Americans Flocking To Public Lands

% who have personally used public lands managed by each agency in the last 12 months



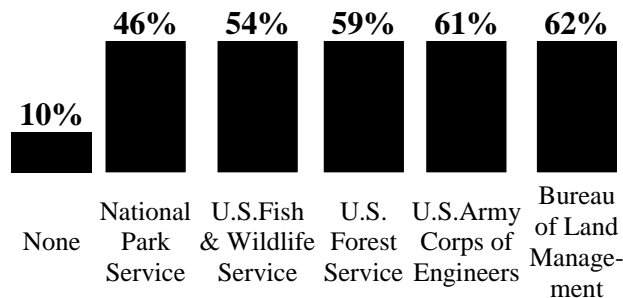
Note: while this question has been asked in the past, data from these prior studies were not used for trending purposes due to a change in the wording of the question. The current wording is an improvement over previous askings.

Lands Used By Americans With The Most Varied Recreational Interests

Avid recreationists, those who have participated in six or more outdoor activities in the past year, are using every type of public land available to them - especially the less popular lands. The lands used most often by the total public such as those managed by the National Park Service and the Fish and Wildlife Service are used least often by this group (46% and 54%, respectively). Americans with the most varied recreational interests prefer lands managed by the U.S. Army Corps of Engineers or the rarely-marked lands in the West managed by the Bureau of Land Management. Indeed, 61% and 62% of avid recreationists have used these lands in the past year, respectively. This may reflect a desire to "escape the crowds at Yellowstone," as well as a likely better understanding of which lands they are on by more avid participants.

Some Lands More Apt To Attract Visitors With Varied Tastes In Outdoor Recreation

% saying they have participated in six or more of the activities about which they were asked



PART 2: RECREATIONAL ISSUES AND THE ENVIRONMENT

This section will discuss the relationship between outdoor recreation and the environment. It will address Americans' level of environmental concern, their reasons for wanting environmental protection and their opinions regarding the impact of outdoor activity on the environment.

SECTION 1: ENVIRONMENTAL ATTITUDES IN THE "DECADE OF THE ENVIRONMENT"

Pollution in Top Ten on List of National Problems

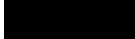
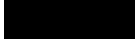
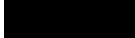

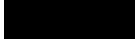


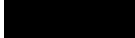





The 1990s have been dubbed the "Decade of the Environment." Kicked off by the well-publicized Exxon Valdez oil spill, an era of strong environmental concern and extensive media coverage ensued which included Earth on the cover of *Time Magazine*. While environmental concern has peaked and valleyed since its zenith in the early 1990s, we have seen environmental consciousness become internalized and pro-environmental behaviors such as recycling incorporated into Americans' daily lives. Environmentalism is a mainstream value in American culture.

This year, ten years after the intense reaction to the oil-covered Alaskan coast and the first of Roper's annual environmental studies, the *Green Gauge Reports*, the environment is still "top of mind" when considering national problems. In fact, 1999 *Green Gauge* data show concern about the pollution of air and water has slipped two notches and traded places with "foreign relations*," yet remains in the top ten on a list of fourteen national concerns. Fifteen percent of all Americans say this problem is one of the "top two or three" about which they are "most personally concerned." Top on that list is "crime" at 42% and "how young people think and act" at 32%. However, unlike other issues which come and go, environmental concern has come and stayed.

* Note that this survey was fielded during the time of the Kosovo War.

Pollution Ranks Tenth On List Of National Concerns

% naming as a top concern

			Pt. change From 1998
Crime		42%	-1
How young people act		32%	--
Government corruption		31%	+2
Court system		30%	-1
Drug abuse		29%	--
Money to pay bills		24%	+1
Quality of education		22%	--
Foreign relations		17%	+4
Inflation and high prices		16%	--
Pollution of air and water		15%	-2
Alcoholism		9%	-1
Recession and unemployment		6%	-1
Fuel and energy shortage		2%	--

Source: 1999 Green Gauge Report






Many Americans See Recreation as One of Main Reasons to Protect the Environment

When Americans are asked to choose the most important reasons to protect the environment, "to protect human health" is named most often. The most recent *Green Gauge* study results show 56% of Americans say it is one of their top one or two reasons. Nearly half of all Americans believe protecting the environment should be done for posterity's sake. Indeed, "health" is followed by "to protect resources for future generations" (48%).

For many Americans, recreation is the key driver to environmental protection. Nearly a third (31%) want clean air, soil and water to "ensure the existence of natural places and wildlife" - and likely to ensure the enjoyment of these areas and animals. One in five Americans want to have safe and clean places for recreation; 20% name "to preserve recreation areas/national parks" one of the main reasons to protect the environment.

Many Americans See Recreation As A Main Reason For Environmental Responsibility

% naming as one of their top one or two reasons

			Pt. change From 1998
Protect human health		56%	-1
Protect resources for future generations		48%	--
Ensure existence of natural places and wildlife		31%	+2
Preserve recreation areas/national parks		20%	-1
Protect resources for the economy		18%	--

Source: 1999 Green Gauge Report

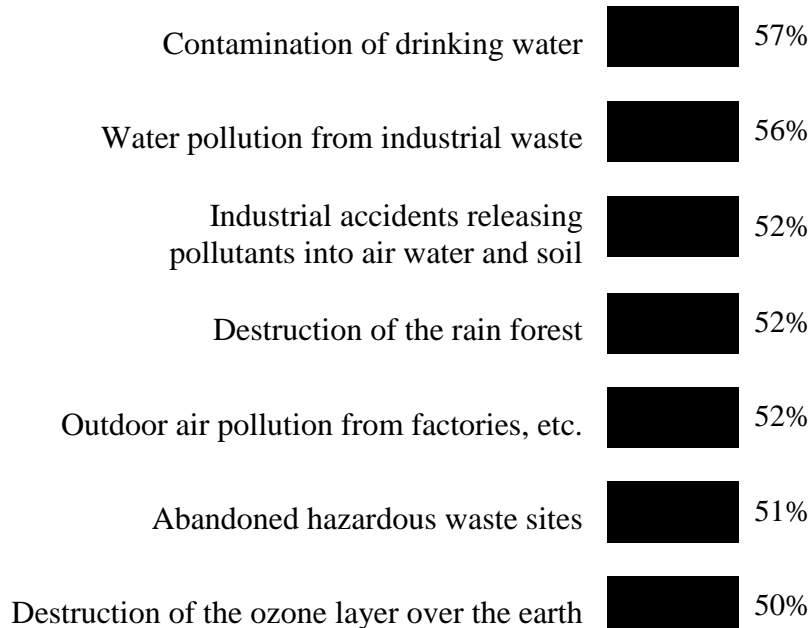
Many of Most Serious Specific Environmental Concerns Affect Recreation

To best understand the level of Americans' environmental concerns, it is important to consider their opinions regarding the seriousness of specific environmental problems. When asked about the seriousness of 29 environmental issues, more than half of all Americans considered the top seven concerns "very serious."

Many specific environmental concerns can impact American recreationists and recreational activity. For example, 56% of Americans are very worried about "water pollution from industrial waste." As water is a key magnet for recreation, these concerns may be deterring some Americans from enjoying water-related activities in their spare time. Likewise, 50% of the public consider the "destruction of the ozone layer over the earth" a "very serious" concern. Any perceived disappearance of this shield to harmful ultra-violet rays could be keeping potential recreationists indoors.

Top Specific Environmental Concerns

% saying problem is a "very serious" concern



Source: 1999 Green Gauge Report

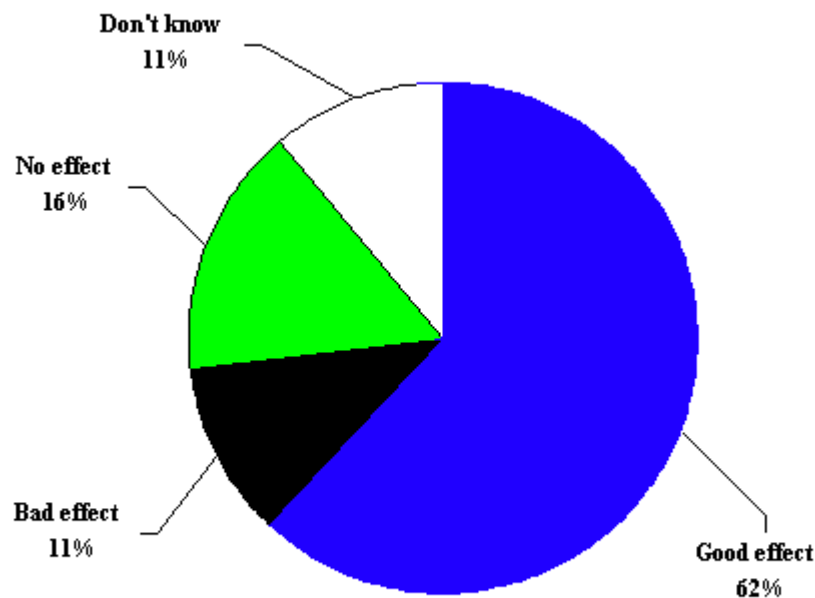
Opinions Regarding The Overall Effect of Outdoor Recreation on the Environment

While Americans are undoubtedly concerned about the environment, they do not think the answer to environmental protection is forbidding the use of public lands. In fact, more than three in four Americans (78%) say outdoor recreation, overall, has a "good effect" or "no effect" on the environment and, 62% believe its effects are "good." Meanwhile, just 11% say it has a "bad effect." Another 11% say they "don't know" how outdoor activity affects land, water and soil suggesting a need to communicate with the public about the benefits and detriments of outdoor recreation to the environment. Americans who "never" participate in outdoor recreation are most apt to say they "don't know" about the environmental effects of these activities (24%).

Southerners (67%, 5 points higher than the total public), Influentials[®] (68%, 6 points higher) and those living in rural areas (67% of "D" Markets, 5 points higher) are all slightly more apt than all Americans to say outdoor recreation is beneficial to the environment.

Most Americans Think Outdoor Recreation Benefits The Environment

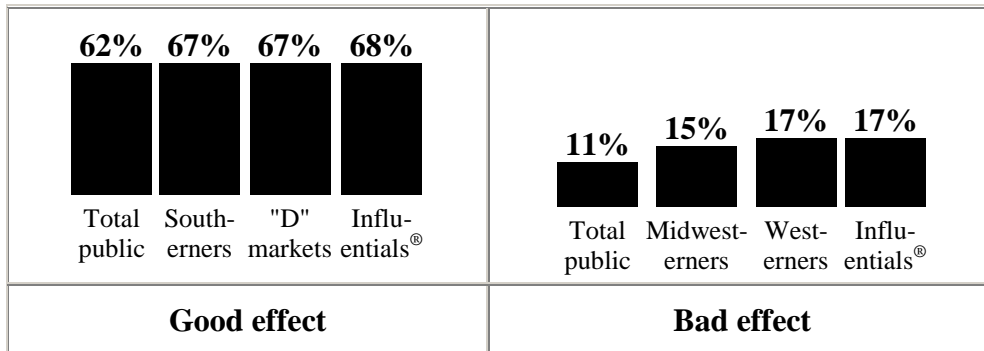
% saying whether they think, overall, outdoor recreation has a good effect, bad effect or no effect on the environment



Midwesterners and Westerners are slightly less optimistic than the total public about recreational use of land. Indeed, these groups are 4 and 6 points more likely, respectively, to say outdoor activity has a "bad effect" on the environment. Interestingly, Influentials®, who are more optimistic than the total public, are also more apt to be pessimistic about the effect of outdoor recreation. Seventeen percent of this group say outdoor recreation has a bad effect on the environment, 6 points higher than all Americans. Still, the number of Influential Americans who say outdoor recreation has a "good effect" outnumber those who say it has a "bad effect" by four to one (68% vs. 17%). Influentials®, who are typically an informed group, know enough to have an opinion one way or the other.

Opinions Regarding The Effect Of Outdoor Recreation On The Environment

% saying whether outdoor recreation has a good effect on the environment or a bad effect

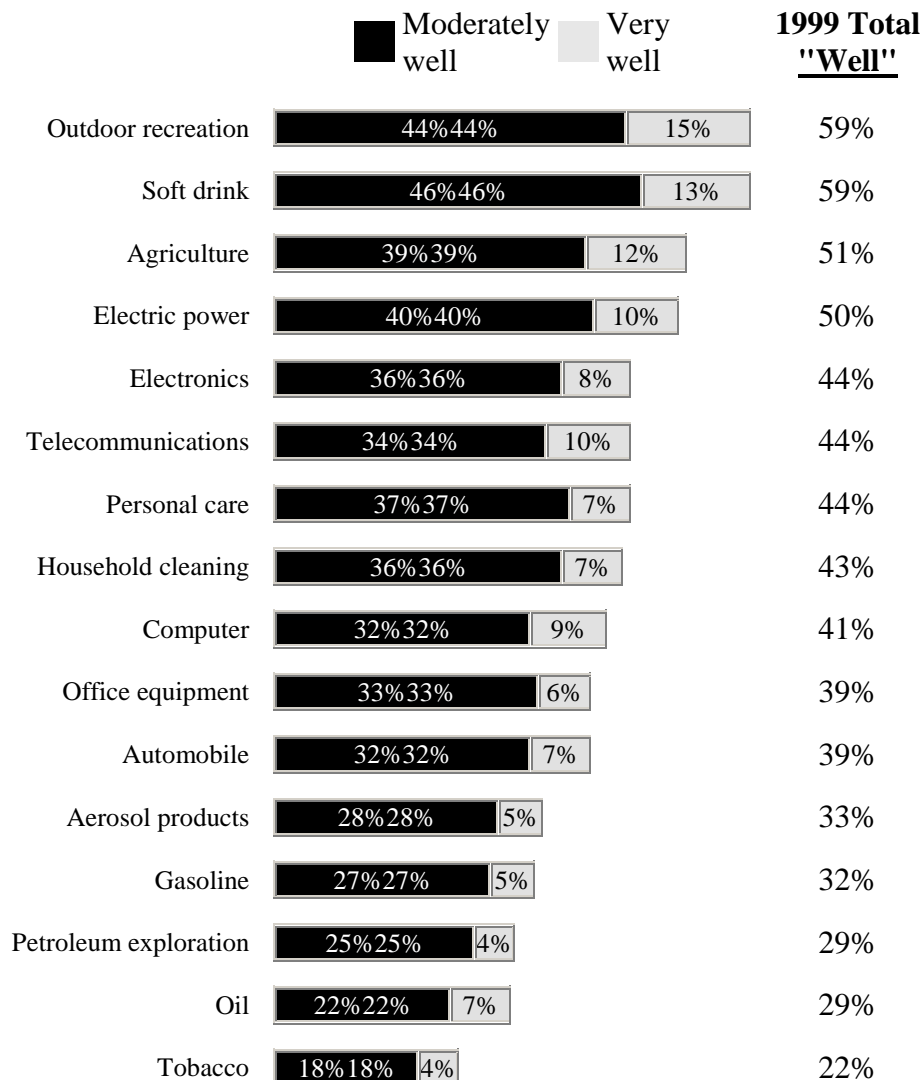


High Marks For The Outdoor Recreation Industry

Considering the fact that the majority of Americans believe outdoor recreation has a positive effect on the environment, it is not surprising that the outdoor recreation industry earns high marks for environmental responsibility. Indeed, when asked how well thirty-three industries are fulfilling their environmental responsibilities, the outdoor recreation industry ties for number one with the soft drink industry, one that is practically synonymous with recycling. Nearly six in ten Americans say the outdoor recreation industry is fulfilling their environmental responsibilities "very" or "moderately well" (59%). Thirteen percent of the public say this industry is doing "not too well" and, just 5% say "not at all well." Nearly a quarter of all Americans say they "don't know" (23%) how well the outdoor recreation industry is doing with regard to fulfilling their environmental responsibilities.

Outdoor Recreation Industry Earns High Rating For Environmental Responsibility

% saying how well each industry is doing fulfilling its environmental responsibility



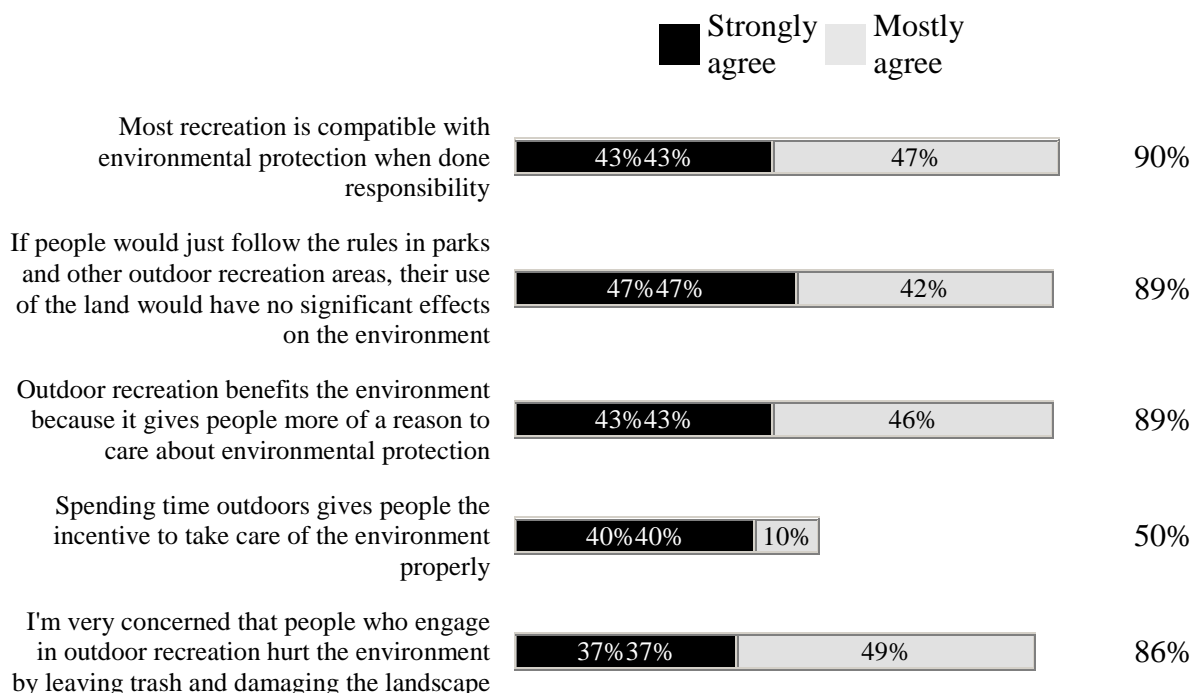
The Role of Rules and Responsibility Regarding Outdoor Recreation and The Environment

Whether catchy and comical as in the "Give A Hoot, Don't Pollute" campaign or deeply moving as in the campaign showing a Native American crying one tear, we were reminded several years ago of the importance of using natural resources responsibly. These campaigns stuck with the American public. Indeed, many Americans think the key to environmentally-safe recreation is responsible behavior. Nearly half of all Americans (47%) strongly agree with the statement: "if people would just follow the rules in parks and other outdoor recreation areas, their use of the land would have no significant effects on the environment," and 42% "mostly agree." Similarly, 90% "strongly" or "mostly agree" that "most recreation is compatible with environmental protection when done responsibly." Still, many have doubts about how responsible recreationists can be. Seventy-six percent say they are "very concerned that people who engage in outdoor recreation hurt the environment by leaving trash and damaging the landscape."

Nearly nine in ten Americans believe outdoor recreation can, in many ways, promote environmental responsibility. Eighty-nine percent "strongly" or "mostly agree" with the statement: "Outdoor recreation benefits the environment because it gives people more of a reason to care about environmental protection." And, 86% agree that "spending time outdoors gives people the incentive to take care of the environment properly." These findings suggest the need for - and potentially great receptivity to - outdoor ethics efforts.

Rules And Responsibility Key To Environmentally Safe Recreation

% saying they "strongly agree" with the listed statement



SECTION 2: ENVIRONMENTAL SEGMENTS AND OUTDOOR RECREATION

A Look at the Environmental Segments

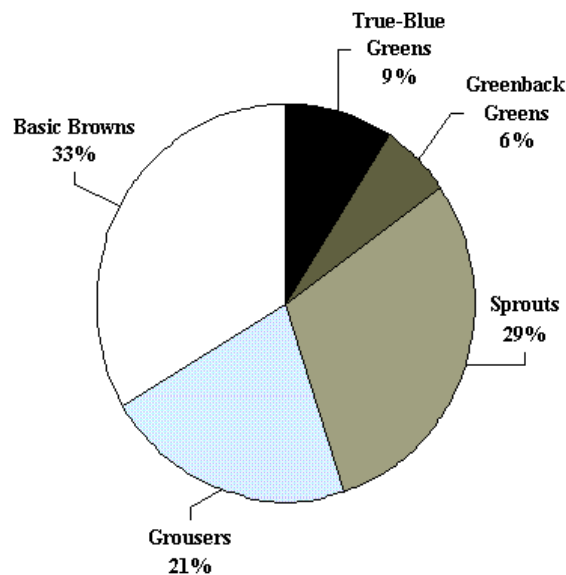
Since the start of *Green Gauge* in 1990, Roper has been conducting a segmentation of the American public based on environmental behaviors. By having Americans say whether they "do on a regular basis," "do from time to time," or "don't really bother about," fourteen different environmental behaviors, five groups emerge within the public. These groups range from the most environmentally committed True-Blue Greens to the least environmentally committed Basic Browns. An average of 46% of True-Blue Greens regularly do the fourteen pro-environmental activities, compared to an average of just 6% for Basic Browns.

Between these extremes on the environmental activism scale are: the Greenback Greens, the Sprouts, and the Grouzers. The Greenback Greens are identified as Americans who support the environmental cause by paying premiums for pro-environmental products. The Sprouts are those who are sympathetic to the cause but not significantly personally involved. The Grouzers are those who take part in a few pro-environmental activities and see the environment as someone else's problem.

Despite high levels of concern about some environmental problems, more than half of all Americans are Basic Browns or Grouzers. A third of the nation (33%) belongs to the Basic Brown group and 21% are Grouzers. These high percentages suggest many Americans feel pro-environmental behaviors are too inconvenient or expensive. Roughly one in ten Americans are the environmentally dedicated True-Blue Greens and 6% are Greenback Greens. About three in ten (29%) are the "fence-sitting" Sprouts.

Size Of The Environmental Segments

% of total public in each segment



Source: 1999 Green Gauge Report

Opinions Regarding the Effect of Outdoor Recreation on the Environment

Across the segments, True-Blue Greens are most optimistic regarding the effect of outdoor activity on the environment. Sixty-eight percent of this group say outdoor recreation has a "good effect" on the environment, 6, 3, and 8 points higher than Sprouts, Grouzers and Basic Browns, respectively. Interestingly, Greenback Greens are least optimistic. Fifty-seven percent of this group say outdoor recreation has a "good effect" and one in five (20%) say it has a "bad effect," the highest among the groups by at least 8 points.

The Effect Of Outdoor Recreation On The Environment: A Look Across The Segments

% saying whether they think, overall, outdoor recreation has a good effect, bad effect, or no effect on the environment

	Total public	True-Blue Greens	Green-back Greens	Sprouts	Grouzers	Basic Browns
	%	%	%	%	%	%
Good effect	62	68	57	62	65	60
Bad effect	11	12	20	12	8	9
No effect	16	15	18	13	17	19
Don't know	11	5	5	13	10	12

True-Blue Greens Most Frequent Recreationists

True-Blue Greens, by definition, are regularly taking part in a number of pro-environmental activities. Since this group is more apt to believe outdoor activity actually benefits the environment, it is not surprising that they engage in outdoor recreation more often than the other segments. Simply stated, for True-Blue Greens, outdoor activity is another pro-environmental activity in which they take part on a regular basis. It may also be true that True-Blue Greens enjoy outdoor activity so much that they are driven to do other pro-environmental activities such as recycling to preserve the land and bodies of water on which they recreate. Wherever the cycle begins, True-Blue Greens are avid outdoorsmen and women. Indeed, more than a third of True-Blue Greens (37%) engage in outdoor recreation several times per week, versus 30% of Greenback Greens, 28% of Sprouts, 19% of Grouzers and 18% of Basic Browns.

Americans on the less active end of the environmental scale should not be described as non-recreationists. While not as often as True-Blue Greens and Greenback Greens, sizable numbers of Grouzers and Basic Browns are heading outdoors for some recreation. Indeed, 45% of Grouzers engage in outdoor activity at least monthly while 40% of Basic Browns do so at least monthly.

True-Blue Greens Recreate Most Often







% saying how often they engage in outdoor recreation

	Total public	True-Blue Greens	Green-back Greens	Sprouts	Grouzers	Basic Browns
	%	%	%	%	%	%
Several times per week	24	37	30	28	19	18
Several times per month	26	33	31	26	26	22
Once a month	17	16	14	18	18	16
Once/twice a year	13	8	15	11	14	15
Less often	9	3	6	8	9	12
Never	11	2	5	10	12	16

When True-Blue Greens set out to enjoy the outdoors they could be doing any number of activities; this group has the most varied taste in outdoor activities of all the segments. More than half of True-Blue Greens (52%) have participated in six or more outdoor activities during the past year. Greenback Greens are not far behind in terms of activity variety. Forty-five percent of this group participated in six or more in the past year, compared to 33% of Sprouts, 24% of Grouzers and 21% of Basic Browns.

True-Blue Greens Most Apt To Do A Variety Of Activities

% saying they have participated in six or more of the activities about which they were asked

	Mean number of activities
Total public 	30% 4.5
True-Blue Greens 	52% 6.6
Greenback Greens 	31% 6.0
Sprouts 	33% 4.9
Grouzers 	24% 4.1
Basic Browns 	23% 3.5

The Environmental Segments and Participation in Specific Outdoor Recreation Activities

Now that we have discussed the frequency of outdoor recreation among the segments, as well as variation in recreation interests, we should focus on the specific activities in which the segments engage. When asked from a list of activities which they have done in the past year, activity preferences for all the segments mimic those of the total public. Indeed, most favored among all the segments is "walking for fitness/recreation." Walking is followed by "swimming" and "picnicking," in some order, for all the segments. Unlike the other three segments, True-Blue Greens and Greenback Greens include bicycling in their top five activities. Meanwhile, Sprouts, Grouzers and Basic Browns express a greater affinity for fishing than for the other activities. Among Sprouts and Grouzers, fishing ranks fifth. For Basic Browns, the old saying "I'd rather be fishing" rings particularly true. Fishing ranks fourth for this group, behind walking, swimming, and picnicking.

True-Blue Greens stand out from the other segments with regard to a number of specific activities. They are significantly more apt than Greenback Greens, Sprouts, Grouzers and Basic Browns to have gone walking (63%, at least 13 points higher than the other segments), hiking (30%, at least 4 points higher), wildlife viewing (28%, at least 5 points higher), bird watching (27%, at least 13 points higher), and motor boating (17%, at least 8 points higher) in the past year. As well, True-Blue Greens are more likely to have engaged in outdoor photography in the past twelve months (28%, at least 7 points higher).

Greenback Greens are statistically on par or above True-Blue Greens with regard to their participation in many specific activities - especially some of the most popular ones. For example, roughly the same percentage of Greenback Greens as True-Blue Greens have driven for pleasure (46% of Greenback Greens vs. 45% of True-Blue Greens), gone swimming (49% vs. 52%) and gone fishing (32% vs. 31%). And, a slightly higher percentage of Greenback Greens have gone bicycling during the past year (38% vs. 33%).

Outdoor Recreation Participation Across Environmental Segments

% who have participated in during past year

	Total public	True-Blue Greens	Green-back Greens	Sprouts	Grouzers	Basic Browns
	%	%	%	%	%	%
Walking for fitness/recreation	42	63	50	47	38	35
Swimming	40	52	49	41	45	30
Driving for pleasure	35	45	46	40	34	24
Picnicking	32	45	49	35	32	32
Fishing	28	31	32	28	27	28
Bicycling	22	33	38	24	23	14
Campground camping	21	28	29	23	19	17
Visiting cultural sites	16	31	28	20	12	7
Running/jogging	16	18	20	15	18	15
Hiking	15	30	26	19	10	10
Wildlife viewing	15	28	23	19	9	10
Outdoor photography	12	28	21	13	10	7
Golf	12	15	16	14	10	11
Motor boating	11	17	9	12	9	10
Bird watching	11	27	14	13	9	5
Back packing	10	19	17	9	8	7
RV camping	9	13	13	11	7	8
Hunting	8	6	5	7	7	11
Off road vehicle	7	7	6	11	7	5
Canoeing/kayaking	7	11	9	7	6	5
Target shooting	7	9	8	8	6	7
Motorcycling	6	5	6	6	6	6
Horseback riding	6	9	10	6	4	5
Mountain biking	6	8	10	7	4	4
Water-skiing	6	7	5	5	5	6
Tennis	6	11	6	7	8	4
In-line skating	5	9	8	5	4	4
Personal water craft (e.g. jet skis)	5	7	8	5	4	6
Downhill skiing	4	7	7	5	6	2
Snorkeling/Scuba diving	4	9	4	4	4	3
Rock climbing	3	4	4	4	4	2
Sailing	3	6	3	3	3	2
Snowboarding	3	1	4	4	3	2
Snowmobiling	2	3	3	3	2	1
Rowing	1	2	2	1	1	1
Cross-country skiing	1	4	1	1	1	*

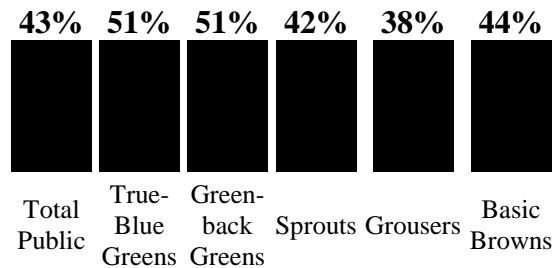
Opportunity to Experience Nature Valued Across the Segments

The recreational behaviors of the environmental segments show, overall, a "stair step effect." Essentially, the most environmentally active consumers are the most recreationally active consumers, the least environmentally active consumers are the least recreationally active consumers and the environmental fence-sitters are moderately active. As True-Blue Greens and Greenback Greens are already more avid recreationists, companies in the recreation industry face the challenge of engaging more Sprouts, Grouzers and Basic Browns in outdoor activity. Due to their placement on the environmental scale, these groups are not likely to be won over by campaigns designed to educate or address broad, seemingly-distance problems such as global warming or the rain forest destruction.

However, those on the less environmentally active end do have a general appreciation for nature and see the opportunity to experience nature as a key driver to outdoor recreation. When asked the importance of specific reasons to participate in outdoor recreation, sizable numbers of Sprouts, Grouzers and Basic Browns say "experiencing nature" is "very important." While not as high as True-Blue Greens and Greenback Greens (51% each), rough four in ten of Sprouts (42%), Grouzers (38%) and Basic Browns (44%) consider bonding with nature a "very important" reason to get outdoors.

Opportunity To Experience Nature Valued Across The Segments

% saying experiencing nature is a "very important" reason to participate in outdoor recreation

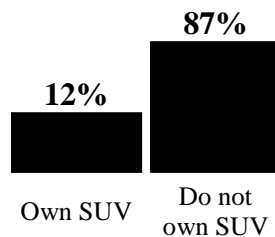


SECTION 3: RECREATION AND TRANSPORTATION

Ownership of Sports Utility Vehicles

As driving for pleasure is a popular activity among all environmental segments, it is important to understand what kind of vehicles these groups are driving. Anyone who has been on the road during the past decade must have noticed the increasing number of sport utility vehicles (SUVs). More than one in ten Americans (12%) own an SUV today. The most environmentally active and the most recreationally active Americans are slightly more apt than the total public to own an SUV. As 16% of both True-Blue Greens and those who recreate several times a week own this kind of automobile, much of their driving for pleasure may be in a sports utility vehicle.

Sport Utility Vehicle Ownership



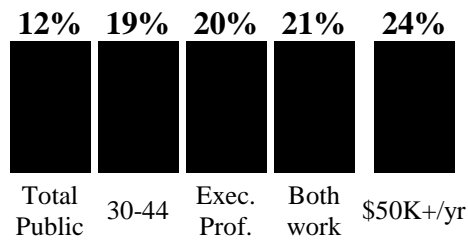
True-Blue Greens And Frequent Recreationists More Apt To Own An SUV



What Other Groups Are More Apt to Own an SUV?

Many SUVs, especially those with luxury features, carry a high price tag. For this reason, it is not surprising that those most apt to own one of these vehicles are from affluent and dual-income homes. Indeed, 21% of Americans in households where both partners work own an SUV and those in households with incomes of \$50,000 or more are twice as likely as the average American to own an SUV (24%). Executive/professionals (20%) and Americans between the ages of 30 and 44 (19%) are also more inclined than the total public to own. The latter group are likely in their primary parenting years and see an SUV as a sporty and comfortable vehicle in which they can pack a picnic and the kids.

Who's Most Apt To Own An SUV?

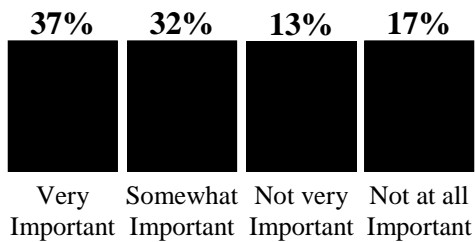


Recreation As A Factor In SUV Purchases

Despite the ease with which an SUV can function as an errand and carpool vehicle, many owners are buying and using this automobile for fun. More than a third of SUV owners (37%) say the potential recreational use of an SUV was "very important" in their decision to buy. And, an additional 32% say it was "somewhat important." Clearly a sizable number of SUV owners chose to buy in order to have the option of easy hunting or hiking. Considering the comfort and style of many SUV models, driving for pleasure may also be a choice activity of many owners.

Importance Of Recreational Use In SUV Purchasing Decision

Based on SUV owners



TECHNICAL APPENDIX

Methodology

The survey was conducted among 2,000 men and women 18 years of age and over. Interviews were conducted by Roper Starch Worldwide in person, in respondents' homes. Interviewing was conducted between June 19 and July 5, 1999.

The segmentation analysis used a clustering technique to look for homogeneous groups which exist in the sample of the population examined; it did not create these groups. Rather, the technique, (K-Means clustering procedure) identifies members of existing groups by looking at the responses of each respondent in the sample to see if that respondent is similar to any existing group and, simultaneously, different from the respondents in any other groups. In this case, we selected environmental behavior as our criteria, and we used these items as the basis for grouping or segmenting the population. Briefly, the Segmentation Groups can be described as follows:

True-Blue Greens are the environmental leaders and activists.

Greenback Greens are the environmental spenders - people willing to pay to improve the environment, but with little time to get involved themselves.

Sprouts are the middling swing group whose attitudes and behaviors can cut both ways - both pro-environmental and anti-environmental.

Grousers are not very involved in environmental activities for many reasons, but mainly because they think others are not doing much either.

Basic Browns are the least involved in the environment because they think indifference to the environment is mainstream.

Sampling Method

The persons interviewed in this study comprise a representative sample of the population of the continental United States, ages 18 and older - exclusive of institutionalized segments of the population (military bases, nursing homes, prisons, etc.).

A multi-stage probability sample of interviewing locations is employed in the research. The probabilities of selection at each stage are based on the latest U.S. Census population data, and detailed Census maps are used to identify and locate the selected areas.

At the first stage, 1,000 counties are selected with probabilities proportionate to population, after all the counties in the 48 contiguous states and the District of Columbia are ordered by population size within 18 strata. The strata are constructed by classifying counties as metropolitan or non-metropolitan with each of the nine Census Geographic Divisions.