

Outdoor Recreation In America 2003: Recreation's Benefits to Society Challenged by Trends

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By:

RoperASW

The power of intelligence in action

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Introduction

Purpose of the Study

This study is the ninth in a series of surveys commissioned by The Recreation Roundtable and conducted by RoperASW. The first survey on outdoor recreation in 1994 demonstrated, as the Recreation Roundtable noted upon its release, that “the public associates recreation with three great issues of the 1990’s: family, the environment, and health.” Over the past ten years, the Recreation Roundtable survey has explored various aspects of Americans’ participation in, and attitudes toward, outdoor recreation—from satisfaction with recreational experiences to attitudes toward federal land management practices. The study has been conducted using comparable methodologies annually except for 2002, when external forces were judged likely to make comparison of data collected with other years difficult. The 2003 study continues this effort with a special focus on fees, volunteerism and familiarity with the various agencies managing federal recreation sites. It also continues efforts to understand the relationship between recreational participation and views on environmental issues and policies.

More specifically, the research objectives of this project were:

- To measure participation levels in a wide range of outdoor recreation activities;
- To assess the frequency of participation in these outdoor recreation activities;
- To determine people’s views about outdoor recreation and its relationship with the environment;
- To investigate people’s interest in and actual involvement in volunteerism on public lands; and
- To monitor changes in attitudes regarding recreation fees at federal sites.

Study Design

The study is based on 2,001 in-person interviews conducted with Americans 18 and older in their homes. All interviewing was conducted by RoperASW during the period of June 14 to 26, 2003. The sample reported on here is representative of the U.S. adult population.

Outdoor recreation is defined in the survey as 37 leisure activities involving the enjoyment and use of natural resources.

A complete description of the methodology, along with a copy of the questions featured in this report, is included in the Appendix at the back of this report.

Availability On The Internet

This report, and information on reports from prior years, will be available on the Internet through www.funoutdoors.com. Also available at this site are links to other key recreation data sources.

STUDY HIGHLIGHTS

- Americans continue to participate in a wide range of recreation activities. While this participation varies by region, income and race, outdoor recreation is a pervasive leisure-time use across the nation. Nine in ten Americans (87%) participated in an outdoor recreational activity over the past twelve months and the mean number of activities enjoyed by those participants was 5.4 of the 37 outdoor recreation activities we track.
- Beginning in 2001 and even more strongly in 2003, a long-time pattern of increasing outdoor recreation participation changed into downward trend. For 2003, only 6 tracked activities showed an increase in participation (percentage of the public reporting participation over the past twelve months) while 21 showed a decline in participation. Only one activity, driving for pleasure, showed a substantial increase (up 7 points from 2001). Concerns about travel arising from the events of September 11, 2001, are likely to have contributed to this decline but other factors, including leisure time opportunities on the Internet and increased offerings through cable and satellite TV channels are also likely factors.
- There was also a significant reported decline in frequency of participation in outdoor recreational activities. There was a 5 point drop between 2001 and 2003 in the percentage of the public reporting participation in recreational activities several times per week (26% versus 21%) and a 7 point drop in those reporting participation several times per month (29% versus 22%).
- The drop in frequency of participation was especially noteworthy among young adults, a trend first noted in the 2001 survey. It is noteworthy that this group reports high access to the Internet. 18-29 year olds are now less likely to be frequent recreation participants (19%) than Americans between the ages of 30 and 44 (24%) or those 45 to 59 (22%). Four in 10 young adults are likely to engage in recreation either less than monthly or never.
- Previous surveys demonstrate widespread public recognition of the positive contributions to quality of life resulting from participation in outdoor recreation. The public links recreation to overall happiness, family unity, health, improved educational opportunities and deterrence of crime and substance abuse. Declines in participation in so many recreational activities and the overall frequency of participation clearly put the benefits arising from recreation participation at risk.
- Federal lands continue to be a magnet for recreation, with 55% of the respondents reporting a visit to an area managed by a federal agency over the past twelve months. Americans continue to be unable to accurately recognize the roles of various federal agencies, however, based upon a divergence between the visitation data collected by these agencies and the management roles at the sites as reported by respondents.

- Willingness to volunteer on federal lands is strong, with 21% of all Americans expressing a personal interest in being a public lands volunteer. Of those interested, 24% reported actual volunteer activities on public lands over the past year. Volunteerism interest is higher among active recreationists in general and much higher among participants in certain activities, notably canoers/kayakers (57%), wildlife viewers (46%) and RVers (41%). Interest in volunteerism is also very high among Roper's special category of "Influentials," at 45%. Interest in volunteerism on public lands appears to have declined over ten years and may reflect cynicism bred by media stories about United Way, the American Red Cross and controversial expenditures at some federal sites.
 - Of those who have visited a federal recreation site recently, most are willing to pay more in fees than they were charged. But this willingness has decreased from earlier studies, likely reflecting more and higher fees at federal sites.
 - The study shows interesting correlations between recreation participation and environmental attitudes, with those most concerned about the environment being especially active in recreation. 82% of Greenback Greens and 75% of True-Blue Greens reported participation in outdoor recreation at least monthly, versus 57% of the public overall.
 - The 2003 data shows a continuing growth in ownership and use of electronic communications and leisure options by the American public. Those in government and in the recreation industry must address this phenomenon and consider the efficacy of a strategy to convert a potential deterrent to recreation participation into a catalyst for increased participation, potentially including use of new technologies from GPS units to interpretive information downloaded to PDAs to enhance outdoor experiences.
 - The outdoor recreation industry once again was credited by the public with a high level of environmental responsibility, scoring higher than any other industry in RoperASW's *Green Gauge Survey*.
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SECTION 1: Outdoor Recreation Participation in 2003

Americans participate in a wide range of outdoor recreation activities, and this participation is nearly universal. There are substantial variations in this participation by region, income and race, but outdoor recreation remains a pervasive leisure-time use across the nation. Nine in ten Americans (87%) participated in an outdoor recreational activity over the past twelve months and the mean number of activities enjoyed by those participants was 5.4 of the 37 outdoor recreation activities tracked by this survey.

There has been some change in the relative popularity of specific outdoor recreation undertakings over the past decade, but walking for fitness/recreation, driving for pleasure and swimming continue to be the three top choices of the public. Each was listed by more than four in ten Americans.

Beginning in 2001 and even more strongly in 2003, a long-time pattern of increasing outdoor recreation participation changed into downward trend. For 2003, only 6 tracked activities showed an increase in participation (percentage of the public reporting participation over the past twelve months) while 21 showed a decline in participation. Only one activity, driving for pleasure, showed a substantial increase (up 7 points from 2001). Concerns about travel arising from the events of September 11, 2001, are likely to have contributed to this decline but other factors, including leisure time opportunities on the Internet and increased offerings through cable and satellite TV channels are also likely factors.

There was also a significant reported decline in frequency of participation in outdoor recreational activities. There was a 5 point drop between 2001 and 2003 in the percentage of the public reporting participation in recreational activities several times per week (26% versus 21%) and a 7 point drop in those reporting participation several times per month (29% versus 22%).

The drop in frequency of participation was especially noteworthy among young adults, a trend first noted in the 2001 survey. It is noteworthy that this group reports high access to the Internet. 18-29 year olds are now less likely to be frequent recreation participants (19%) than Americans between the ages of 30 and 44 (24%) or those 45 to 59 (22%). Four in 10 young adults are likely to engage in recreation either less than monthly or never. The decline in frequency of participation was greatest in young adults, increasing faster than among any other age group.

Especially noteworthy is the disparity in outdoor recreation participation in various regions of the country. Residents of the Northeast and South are significantly less likely to participate in virtually all forms of outdoor recreation than those in the Midwest and the West. Those in the Northeast participate near or above the national average in only seven of 37 of the monitored activities, and the percentage that report participation in “none” is one in five, seven points higher than the national level. Tennis is the only activity in which participation by Northeast residents exceeds the national average by three points of more. And Northeasterners participate in an average of just 3.6 different outdoor recreation activities annually as compared with a national average of 4.7. Southerners score slightly higher, with an average of 3.8 different outdoor recreation activities annually (compared to the national average of 4.7) and are near or above the national participation rate for ten activities.

In contrast, Midwestern residents exceed national participation rates for every one of the monitored activities and report participation in an average of 7.0 different activities annually. Only 8% of those in the Midwest report no participation in outdoor recreation. Westerners are not far behind, reporting participation in an average of 4.7 activities, and participation was below the national average for just seven activities. Swimming and fishing are the activities lagging farthest behind national participation rates. The West also had the lowest percentage of residents reporting no outdoor recreation participation – 6% – less than half the national rate.

Research in previous years has shown a clear correlation between income, education and higher participation in outdoor recreation. This correlation was still present in the 2003 research. Those with a college degree or higher reported participation in an average of 5.9 activities, compared to a national average of 4.7 and 3.7 for those with a high school degree or less. Similarly, those with household incomes of \$75,000 or more reported participation in an average of 5.8 different activities while those with household incomes below \$30,000 reported an average of 3.8 activities.

Disparity in participation by ethnic background also continued. White Americans participated in an average of 5.2 different outdoor recreation activities compared to 2.3 for African Americans and 3.5 for Hispanic Americans. The sole activity in which African American participation approached average levels was running; for most other activities, the rate of participation was 50% or more below national averages.

Recreation participation by families with children is generally above the national average, and families with one or more children under the age of seven are the most active. Family members participate in a mean number of 5.4 activities annually versus 4.7 for the average adult. Families participate above the national average in most activities and especially in swimming (14 points above average), picnicking (eight points higher), tent camping and walking (both six points higher), fishing and camping (five points higher), bicycling (four points higher) and wildlife viewing and horse-riding (both three points above average).

Outdoor Recreation Activities Participated In Past Year: Trend Data

% who have participated in during past year; activities ranked by 2003 data

	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2003</u>
	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>	<u>%</u>
Walking for fitness/recreation	NA	45	39	42	47	42	57	49	46
Driving for pleasure	40	36	33	34	39	35	41	36	43
Swimming	35	31	28	31	33	40	39	40	41
Picnicking	33	29	24	26	30	32	36	36	38
Fishing	26	24	22	20	22	28	26	28	28
Bicycling	21	20	16	19	19	22	23	23	22
Running/jogging	19	16	13	12	16	16	18	21	19
Campground camping	16	16	12	12	15	21	17	18	18
Hiking	18	18	12	15	17	15	19	22	18
Outdoor photography	15	15	10	13	15	12	17	17	17
Bird watching	14	11	8	11	10	11	16	18	16
Wildlife viewing	18	15	10	14	16	15	16	20	16
Visiting cultural sites	NA	NA	12	14	18	16	16	17	15
Golf	11	12	11	11	12	12	13	12	13
Motor boating	10	9	5	8	9	11	9	12	10
Back packing	13	12	8	7	10	10	9	10	9
Canoeing/kayaking	6	5	4	5	5	7	5	7	8
Hunting	8	7	7	5	7	8	8	8	8
RV camping	8	8	6	7	7	9	9	9	8
Wilderness camping	NA	NA	NA	NA	NA	NA	8	8	7
Horseback riding	6	5	5	4	4	6	5	6	6
Motorcycling	7	5	6	4	4	6	5	6	6
Off road vehicle driving	5	5	5	5	7	7	7	7	6
Target shooting	8	6	5	4	5	7	6	6	6
Tennis	9	9	7	8	5	6	8	8	6
Mountain biking	5	5	4	4	4	6	5	5	5
Personal water craft (e.g. jet skis)	NA	NA	NA	3	5	5	5	6	5
Downhill skiing	6	6	5	5	5	4	4	5	4
Water-skiing	6	6	3	4	4	6	4	6	4
In-line skating	NA	4	4	5	6	5	5	6	3
Rock climbing	4	4	3	3	4	3	4	4	3
Rowing	3	2	1	2	1	1	2	2	3
Sailing	4	3	3	3	2	3	2	4	3
Snorkeling/Scuba diving	4	3	3	3	3	4	3	4	3
Cross-country skiing	2	3	2	2	2	1	2	2	2
Snowboarding	NA	NA	NA	NA	1	3	2	3	2
Snowmobiling	2	3	2	1	2	2	2	2	2

(NA) denotes not asked

Winners and Losers: Changes in % of the American Population Engaging in Key Outdoor Recreation Activities

Increased Participation (6)	No Change (10)	Decreased Participation (21)
Driving for pleasure (+7)	Fishing	Walking for fitness (-3)
Swimming (+1)	Outdoor photography	Bicycling (-1)
Picnicking (+2)	Campground camping	Running/jogging (-2)
Golf (+1)	Hunting	Hiking (-4)
Canoeing/kayaking (+1)	Target shooting	Wildlife viewing (-4)
Rowing (+1)	Motorcycling	Bird watching (-2)
	Horseback riding	Visiting cultural sites (-2)
	Mountain biking	Backpacking (-1)
	Cross-country skiing	Motorboating (-2)
	Snowmobiling	RV camping (-1)
		Wilderness camping (-1)
		Tennis (-2)
		Off-road vehicle use (-1)
		In-line skating (-3)
		Personal watercraft use (-1)
		Downhill skiing (-1)
		Waterskiing (-2)
		Rock climbing (-1)
		Snorkeling/scuba (-1)
		Sailing (-1)
		Snowboarding (-1)

Overall Frequency of Recreation Participation of the American Public 2001 Versus 2003

	2001	2003
Several times weekly	25.9%	21.2%
Several times monthly	28.6%	22.2%
Once per month	14.8%	13.7%
Less often	18.9%	30.4%
Never	9.6%	10.6%

Frequency of Recreation Participation by Age, 2001 vs. 2003

	Most frequent participants (several times per week), as % of all in category			Participated at least monthly, as % of all in category			Least frequent participants (never, less than monthly), as % of all in category		
	2003	2001	Change	2003	2001	Change	2003	2001	Change
All ages	21	26	-5	36	43	-7	41	28	+13
18-29	19	27	-8	41	51	-10	38	21	+17
30-44	24	27	-3	40	45	-5	34	25	+9
45-59	22	22	0	30	45	-15	46	30	+16
60+	18	27	-9	31	31	0	48	40	+8

SECTION 2: Volunteerism in the Outdoors

A key focus of this year's research was interest in volunteerism on public lands, stimulated in part by the relaunch of the Take Pride in America program, which seeks to recruit and recognize volunteers on federal, state and local public lands. The survey found that willingness to volunteer on federal lands is strong, with 21% of all Americans expressing a personal interest in being a public lands volunteer. Of those interested, 24% reported actual volunteer activities on public lands over the past year.

Volunteerism interest is significantly higher among active recreationists in general and much higher among participants in certain outdoor activities, notably canoers/kayakers (57%), skiers (52%), backpackers and climbers (both 47%), wildlife viewers (46%), hikers (44%), mountain bikers (43%) and RVers (41%). Interest in volunteerism is also very high among those in the special category of "Influentials," at 45%. Interest in volunteerism on public lands appears to have declined over ten years and may reflect cynicism bred by media stories about United Way, the American Red Cross and controversial expenditures at some federal sites.

Despite high interest, actual volunteerism on public lands involves few Americans – under 6% of the adult population. Even among recreationists, only about one third of those reporting an interest actually volunteer.

Interest in volunteerism declines with age – from 26% of those between the ages of 18 and 29 to just 9% of those over 70. Yet actual volunteerism is strongest among young adults and those in late career/early retirement years (ages 60-69), with 8% of those in each category reporting actual volunteer activities on public lands. Divorced Americans report a higher level of interest in volunteering on public lands and a significantly higher actual level of volunteerism (26% and 12%) than married Americans (20% and 7%). Finally, middle-income Americans are tops in both interest and actual volunteerism, substantially ahead of those in families with incomes below \$30,000 or above \$150,000 annually.

The chief reason reported for not volunteering by those reporting an interest is "too busy," at 53%. Yet the second most common reason was that they "didn't know how to get started" as volunteers – one in four of all who have an interest in public lands volunteerism. This suggests a opportune target for the recreation industry and public land agencies: recreationists who now visit public lands but are not currently volunteers.

**Volunteerism on Public Lands – Status of Those Reporting an Interest
(21% of all respondents)**

	All with interest	Gen Xers	Boomers	Pre-Boomers	Influentials	Household income \$50K+	Blue Collar
Already Volunteers	24%	18%	26%	30%	40%	29%	17%
Too busy	40%	51%	38%	27%	39%	36%	43%
Don't know how to get started	18%	16%	17%	19%	9%	24%	22%
Didn't for other reason	18%	14%	19%	24%	11%	10%	16%

**Interest in Volunteerism on Public Lands by Environmental Attitudes
(Roper Green Gauge Segmentation)**

Group	% Indicating interest in volunteerism on public lands	% Indicating a recent visit to federal lands
All Americans	21	55
True-Blue Greens	34	74
Greenback Greens	40	63
Sprouts	20	58
Grouzers	22	65
Basic Browns	14	43

	Total Population	Actual Public Land Volunteers	Index
Survey Base Size	2001	112	
Male	48%	52%	108%
Female	52%	48%	93%
18-29	22%	29%	136%
30-44	31%	29%	92%
45-59	26%	22%	87%
60+	22%	20%	91%
under \$30K	25%	16%	63%
\$30-\$50K	21%	19%	91%
\$50K+	27%	40%	148%
\$75K+	15%	22%	150%
College Grad	24%	36%	146%

Source: Roper ASW
Independent Research
Study, June 2003
(n=2001)

SECTION 3: Visitors to Federal Recreation Sites

Federal lands are magnets for recreation. Agency statistics suggest that there are in excess of one billion recreation-related visits to federally-operated sites annually. Fifty-five percent of the respondents to this study reported a visit to an area managed by a federal agency over the past twelve months.

As indicated in previous surveys, Americans appear unable to accurately recognize the identities of various federal outdoor recreation-providing agencies. Based upon visitation data collected by the federal agencies, the U.S. Army Corps of Engineers hosts a greater number of visits annually than any other agency, followed by the Forest Service. However, the public reports in this survey a higher likelihood to have visited a National Park Service site. Part of this likely involves the role of other entities: more than half of all downhill skiing occurs on national forests, yet many of those who ski at resorts such as Vail and Aspen, Mammoth and Snowbird may not recognize that they are skiing on national forest lands upon which these businesses have permits. And many U.S. Army Corps of Engineers lakes are accessed through marinas operating under permits or state and county parks constructed on Corps lands. Further, it is likely that the public associates beautiful areas with parks, whether or not the areas are actually managed by the National Park Service.

While a majority of Americans report visits to federal recreation sites over the past twelve months, these visitors differ from the overall American public. Moreover, there are important differences in the characteristics of visitors to sites managed by the agencies.

One key difference involves regions. Although federal lands cover nearly one-third of the U.S., they are distributed unevenly. Most federal lands are located in the west, and relatively little of the lands of the Northeast are federally managed. Thus, it is not surprising that Northeast US residents constitute just 16% of the visitors to federal sites, despite constituting more than 19% of the population. Midwesterners are clearly over-represented, comprising 28% of all federal site visitors while numbering only 23% of the U.S. population. Westerners are also over-represented, with 22% of the population and 25% of all visitors. Southerners are under-represented at 32% of all federal site visitors but 36% of the U.S. population.

There are other interesting variations in visitation patterns to federal lands. Hispanic Americans are under-represented among visitors to national forests, wildlife refuges and national parks, but are in rough alignment with overall population percentages among visitors to U.S. Army Corps of Engineers and BLM sites. This is likely attributable to location of the areas and activities offered. African Americans are under-represented among visitors to each of the land systems.

Families are over-represented among visitors to Corps, Forest Service and National Park Service Sites, and younger adults (ages 18-29) are over-represented among visitors to national forests and national park sites. Families with incomes of \$50,000 to \$75,000 are over-represented among visitors at each of the land systems. Federal site visitors are above average in PC ownership and internet access at home.

Of those who have visited a federal recreation site recently, most are willing to pay more in fees than they were charged. But this willingness has decreased from earlier studies, likely reflecting more and higher fees at federal sites.

**Reported Visits to Federally Managed Recreation Sites
Over the Past Twelve Months**

Managing Agency	% Of Respondents Reporting Visit During Past Year
Visited At Least One Federal Site Over Past Two Years	55
Visited National Park Service Site	32
Visited Forest Service Site	28
Visited Fish and Wildlife Service Site	22
Visited U.S. Army Corps of Engineers Site	14
Visited Bureau of Land Management Site	9

**VARIATIONS IN VISITATIONS TO FEDERAL RECREATION SITES
BY REGION**

	NorthEast	MidWest	South	West
% of total US pop	19.3	23.3	35.6	21.7
% reporting visit to federal site	16.0	27.6	32.0	24.6
±	-3	+5	-3	+3

Key Variations in Visitor Characteristics by Federal Agency Sites

	Bureau of Land Management	US Army Corps of Engineers	US Fish and Wildlife Service	USDA Forest Service	National Park Service
% public reporting a visit	9%	14%	22%	28%	32%
Demographic variations in visitors	↓African/Americans ↑ urban ↑ small cities ↑ \$50K, \$75K hhlds	↓African/Americans ↑ families ↑ 45-59 ↑ \$50K, \$75K hhlds	↓African/Americans ↓Hispanics ↑ \$50K, \$75K hhlds	↓ African/Americans ↓Hispanics ↑ small cities ↑ suburbs ↑ families ↑ 18-29 ↑ \$50K, \$75K hhlds	↓ African/Americans ↓Hispanics ↓ rural ↑ families ↑ 18-29 ↑ 45-59 ↑ \$50K, \$75K hhlds ↓ <\$30K hhlds
Regional variations	↓ Northeast ↑ West	↓ Northeast ↑ Midwest	↓ Northeast ↑ Midwest	↓ Northeast ↑ West	↓ Northeast ↑ West
Influentials	↑ @ 18%	↑ @ 38%	↑ @ 41%	↑ @ 47%	↑ @ 52%
Green Gauge segmentation			↑ True-Blues ↑ Grouzers	↑ True-Blues ↑ Greenbacks	↑ True-Blues ↑ Greenbacks ↑ Grouzers
Recreational activities	↑ All, especially skiers, off-road bicyclists, backpackers	↑ All, esp. canoers/ kayakers, wildlife viewers, equestrians, hikers, golfers, motorboaters	↑ All, especially RVers, equestrians, off-road bicyclists, canoers/kayakers and skiers	↑ All, esp. skiers, off-road bicyclists, equestrians, canoers/ kayakers, backpackers and RVers	↑ All, esp. skiers, off-road bicyclists, equestrians, canoers/ kayakers, RVers and hikers
Frequency	↑ several times monthly	↑ several times weekly	↑ several times monthly ↑ once/month	↑ several times monthly	↑ several times monthly ↑ once/month
Technology linkages	↑ PC ownership ↑ home web accessor	↑ PC ownership ↑ home web accessor	↑ PC ownership ↑ home web accessor	↑ PC ownership ↑ home web accessor	↑ PC ownership ↑ home web accessor

SECTION 4: Policy Implications and Opportunities

Previous surveys demonstrate widespread public recognition of the positive contributions to quality of life resulting from participation in outdoor recreation. The public links recreation to overall happiness, family unity, health, improved educational opportunities and deterrence of crime and substance abuse. Declines in participation in so many recreational activities and the overall frequency of participation clearly put the benefits arising from recreation participation at risk.

- The study shows interesting correlations between recreation participation and environmental attitudes, with those most concerned about the environment being especially active in recreation. 82% of Greenback Greens and 75% of True-Blue Greens reported participation in outdoor recreation at least monthly, versus 57% of the public overall.
- The 2003 data shows a continuing growth in ownership and use of electronic communications and leisure options by the American public. Those in government and in the recreation industry must address this phenomenon and consider the efficacy of a strategy to convert a potential deterrent to recreation participation into a catalyst for increased participation, potentially including use of new technologies from GPS units (such as geo-caching) to interpretive information downloaded to PDAs to enhance outdoor experiences.

The outdoor recreation industry once again was credited by the public with a high level of environmental responsibility, scoring higher than any other industry. The highest ratings come from young adults (ages 18 to 29), blue collar workers and those living in the South and Midwest.

There appears to be a shift in public environmental attitudes underway. Between 2001 and 2003, the percentage of Basic Browns has climbed noticeably from 28% to 38% of the public. Declines were seen among True-Blue Greens (down 3 points), Sprouts (down 2 points) and Grouzers (down 4 points).

The recreation community is in an enviable position because new and significant forces are viewing recreation as a means to achieve important public policy objectives. These forces include federal health interests, under the leadership of the Centers for Disease Control and Prevention, federal tourism and economic development agencies and anti-crime agencies.

**Changes in Environmental Attitudes: Roper Segmentation
2001 Versus 2003 in percentages**

	True-Blue Greens	Greenback Greens	Sprouts	Grouzers	Basic Browns
2001	12%	5%	33%	20%	28%
2003	9%	5%	31%	16%	38%

Recreation and Technology

	All Americans	Those reporting participation several times each week	Those reporting participation but less than monthly
Cable TV	72%	68%	76%
Dish for satellite TV	15%	14%	15%
Accessed Internet at home within 30 days	50%	60%	45%
Own a cell phone	58%	67%	52%

Leisure-Related Technologies and American Generations

	All Americans	Ages 18-29	Ages 30-44	Ages 45-59
Have cable	72%	68%	74%	75%
Have satellite dish	15%	16%	14%	14%
Use PC at home	53%	60%	65%	52%
Access Internet at home	50%	52%	63%	49%
Have cell phone	58%	62%	68%	62%

Definition of Terms

Segmentation Analysis: the clustering technique used in this study looks for homogeneous groups which exist in the sample of population examined; it does 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 behavior can cut both ways – both pro- and anti-environment.

Grouzers are not much 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.

Influentials represent respondents who report engaging in some or all activities on a list that includes running for political office, writing a letter to the editor, making public speeches or writing articles, working in political campaigns, serving as an officer of a civic/fraternal organization, signing a petition, etc. Influentials have done three or more of these things (not counting signing a petition) and may be roughly equated with “thought leaders.”