

SPECIAL REPORT ON FISHING AND BOATING

2012



A Partnership
Project of:



RECREATIONAL
BOATING & FISHING
FOUNDATION



OUTDOOR
FOUNDATION™

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Executive Summary

Perhaps more than any other form of recreation, fishing and boating are critical to the health and well-being of America's outdoor heritage. By boat and on land, the first outdoor experience for many Americans is fishing, introducing tens of millions of people each year to the wonders of nature. Fishing also serves as an important bridge and top "gateway" activity that leads participants to other outdoor passions. Equally important, fishing and boating enthusiasts provide critical funding for conservation and community programs across the country through license fees and fishing-related excise taxes. The result: tens of millions of active, outdoor champions and environmental stewards and a lasting legacy of natural resources that will be passed down to future generations.

This 62-page *Special Report on Fishing and Boating* provides a comprehensive look at overall trends in participation as well as detailed information and analysis on specific fishing and boating categories — including motivations, barriers and preferences of key groups. This research publication will inform those in the fishing and boating community — and those in the entire outdoor community — about the demographics and behaviors of current participants and identify opportunities for engaging the next generation of fishing and boating enthusiasts.

Fishing Participation Trends and Opportunities

A true American tradition, fishing remains the most popular recreational activity in the country — surpassing running, camping, hiking and biking. In fact, more than 46 million Americans went fishing in 2011. That equates to 16.2 percent of the population, a slight increase from 16 percent in 2010.

There is good news for fishing this year. For the first time in the history of this special report, fishing added participants, reversing a trend and giving cause for cautious optimism. This growth is from returning fishing participants with new participants relatively flat, reinforcing the key opportunity to focus on retention strategies. Additionally, new increases were reported in participation among females and youth, important new target groups for the sport. In 2011, females and youth ages six to 12 added the most new participants — showing promise for the future and unprecedented interest in this still male-dominated activity.

The data also shows that fishing is a family-friendly activity that inspires Americans to get up and get outside. More than 19 percent of adults with children in their households participate in fishing, while only 13 percent of adults without children in their households participate. And, it's common that families don't stop their outdoor activities at fishing. Nearly 85 percent of fishing participants engage in other outdoor activities, instead of fishing alone.

The fastest growing United States population segment, Hispanic Americans, represent an extraordinary opportunity. While Hispanic Americans make up only 12 percent of fishing participants, those Hispanics that do fish make more annual fishing trips than any other group — indicating that fishing has huge appeal and potential with this group.

When engaging new audiences, it appears freshwater fishing is a great place to start since accessible freshwater sources can be found throughout the United States. Of the 16.2 percent of Americans that fish, 13.6 percent are freshwater fishing participants. Saltwater fishing is the second most popular kind of fishing, with participation that grows from childhood to adolescence and remains strong through young adulthood. Although fly fishing has the fewest number of participants, it has the greatest number of people interested in taking up the sport. Overall, more than eight percent of those Americans who don't fish are interested in trying it — a great opportunity to grow participation.

Boating Participation Trends and Opportunities

For many fishing participants, boating is all part of the experience. In fact, more than half of fishing participants fished from a boat in 2011. And, of the more than 594 million boating outings taken in 2011, almost 38 percent of them included fishing.

Although participation in boating was down slightly from 18.1 percent in 2010 to 17.8 percent in 2011, the average number of outings per boater increased. On average, each boating participant made 14 annual outings in 2011, compared to 13.2 outings in 2010. The total number of boating outings increased from 560.2 million outings to 594.2 million outings — great news for the sport.

Boat owners tend to be male adults between ages 45 and 64, earning \$100,000 or more annually. Most privately owned boats are multispecies or other kinds of fishing boats and are kept on trailers at the owner's private residence. Additionally, about 18 percent of boating participants rent or charter a boat while on vacation.

To engage potential owners, the social aspect of boating should be the focal point. Indeed, more than 63 percent of boating participants report going out on the water with friends. Boating participants are also inspired by cruising on the boat (for females) and enjoying a day of fishing (for males).

For fishing and boating communities, participation trends are very promising and indicate that outreach programs are working. In addition, these trends offer encouraging news for the overall outdoor community and America's outdoor heritage.

FISHING

More than 46 million Americans, or 16.2 percent of the population of the United States, went fishing in 2011. That represents a slight increase in fishing participation, up from 16 percent in 2010.

One of the most notable findings, the “Leaky Bucket” analysis, shows that fishing gained more participants than it lost in 2011. While eight million participants stopped fishing, 8.8 million former participants or new participants joined the sport. The net gain of nearly 800,000 participants is a significant improvement over 2010 when the sport of fishing lost 10.6 million participants and only added 8.1 million returning or new participants.

Although the number of fishing participants increased, the number of fishing outings decreased. In 2011, fishing participants took 840 million fishing trips and each participant spent an average of 18.2 days fishing. That is down from 925 million outings and an average of 20.4 annual fishing days in 2010.



46 Million

More than 46 million Americans participated in fishing in 2011.



800,000

Fishing gained nearly 800,000 new or returning participants.

Total Participation

2006	49.7 million participants 18.3% of Americans ages 6+
2007	51.8 million participants 18.7% of Americans ages 6+
2008	48.2 million participants 17.2% of Americans ages 6+
2009	48.0 million participants 17.0% of Americans ages 6+
2010	45.4 million participants 16.0% of Americans ages 6+
2011	46.2 million participants 16.2% of Americans age 6+



Females & Youth

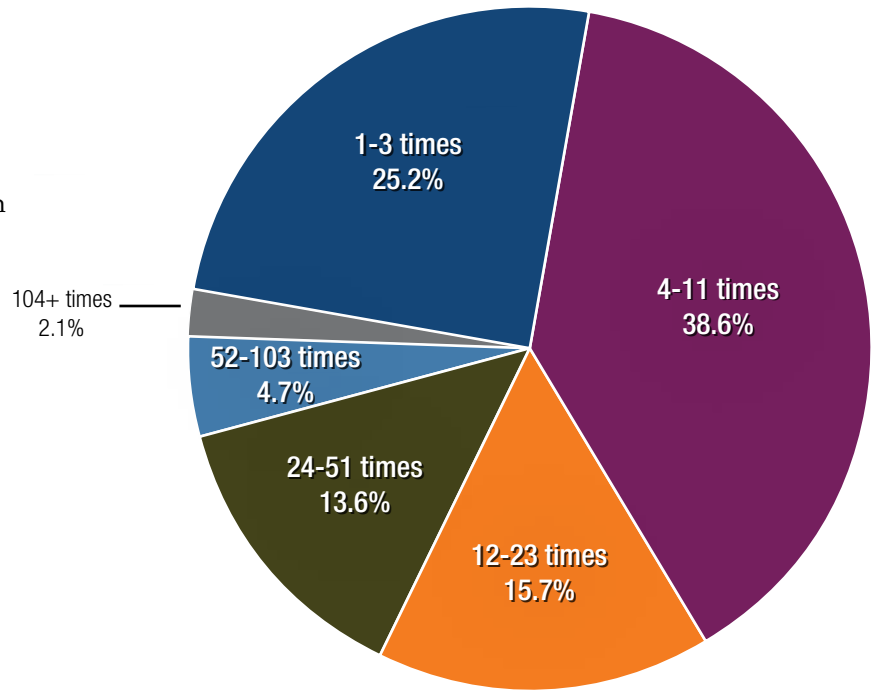
Females and youth ages six to 12 added the most new fishing participants.

Annual Outings

In 2011, fishing participants made 840 million annual outings — either close to home or on an overnight trip. For some participants, this meant fishing once a week and for others, once a month or once a season.

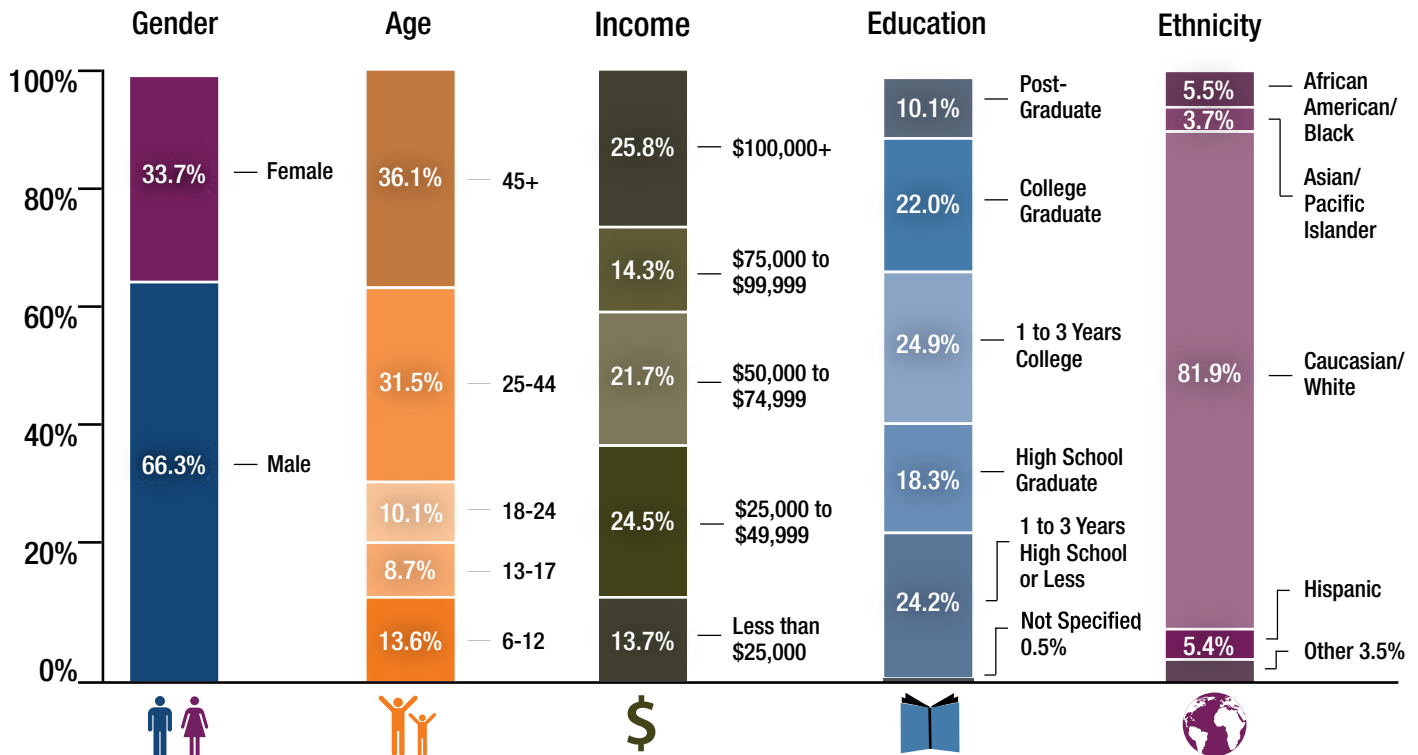
18.2 days

The average number of annual outings per fishing participant.



Annual Outings Among Fishing Participants, Ages 6+

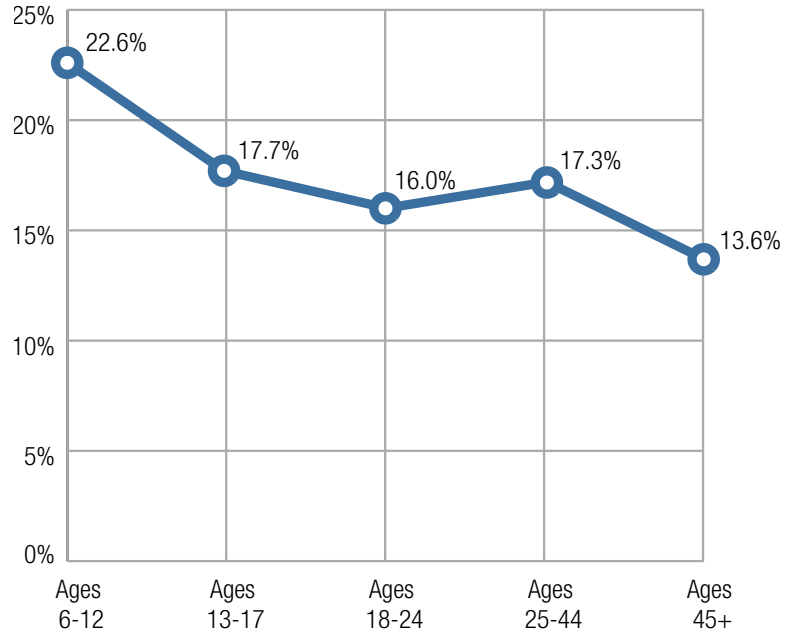
Demographics



Participation Life Cycle

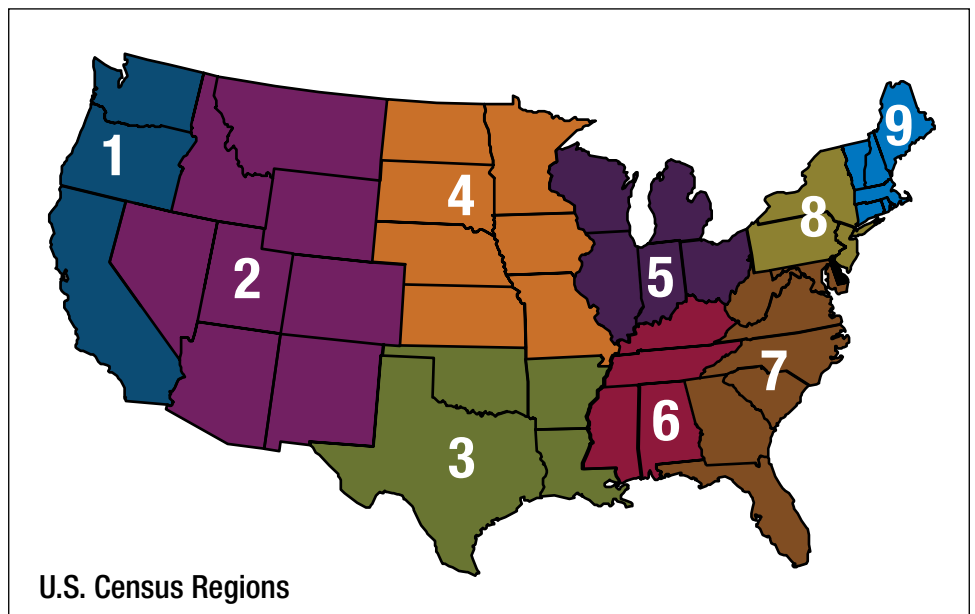
The participation rate among different age groups varies as individuals age and their lives are shaped by their environment and life experiences. A one-year snapshot of fishing participation helps describe this life cycle of participation.

The life cycle of fishing participants is similar to those in other outdoor sports and activities. Although youth participation is initially high, it declines sharply during adolescence.



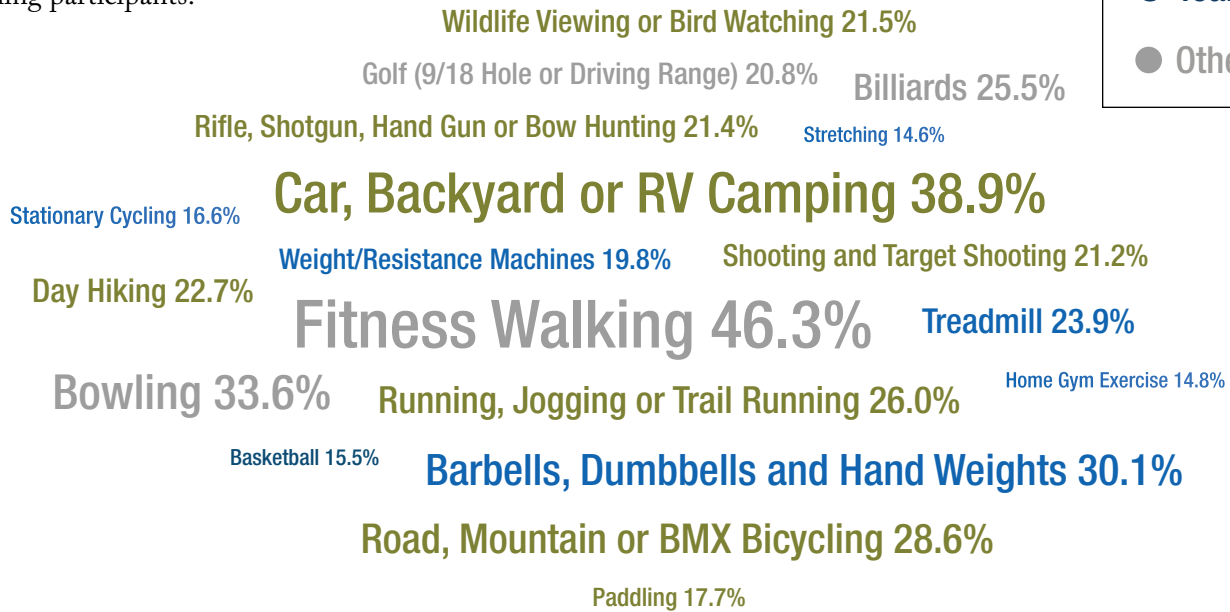
Geography of Participants

- 1. Pacific: **11.8%**
- 2. Mountain: **8.6%**
- 3. West South Central: **12.5%**
- 4. West North Central: **9.3%**
- 5. East North Central: **17.5%**
- 6. East South Central: **6.4%**
- 7. South Atlantic: **19.1%**
- 8. Middle Atlantic: **11.0%**
- 9. New England: **3.9%**



Crossover Participation

What are the top outdoor, indoor fitness, team and other activities enjoyed by fishing participants?



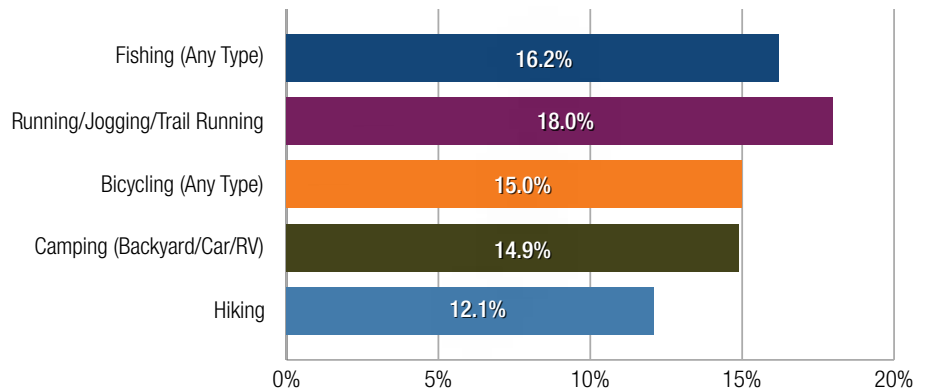
Note: Data includes top 20 most popular crossover activities.

Fishing: A Gateway to the Outdoors

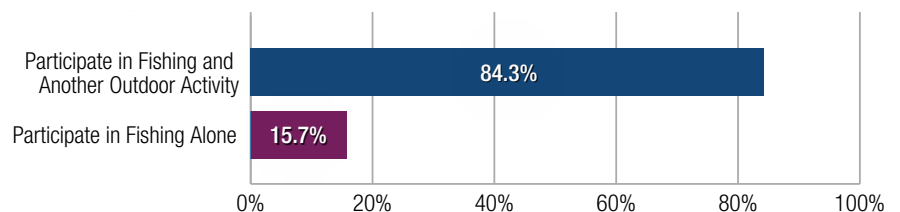
Outdoor participation often begins with one specific “gateway” activity. Accessible and popular, these pastimes often lead to participation in other outdoor endeavors. Running/jogging/trail running is the most popular gateway activity, with fishing coming in a close second.

A majority — 84.3 percent — of fishing participants participate in multiple outdoor activities. A small percentage participate in fishing alone.

Participation in the Gateway Activities



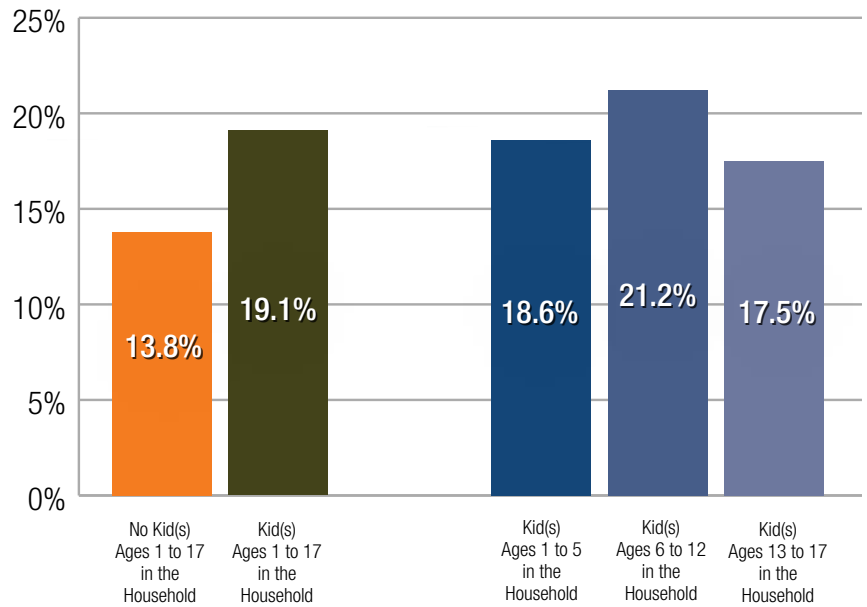
Fishing Participants: Outdoor Enthusiasts



Participation in Fishing Among Adults with Children

Adults with children in their households participate in fishing at higher levels than adults without children, suggesting that fishing is a family-friendly activity.

More than 19 percent of adults (ages 18 and older), with children ages one to 17 in their households participate in fishing, while only 13.8 percent of adults without children in their households participate.



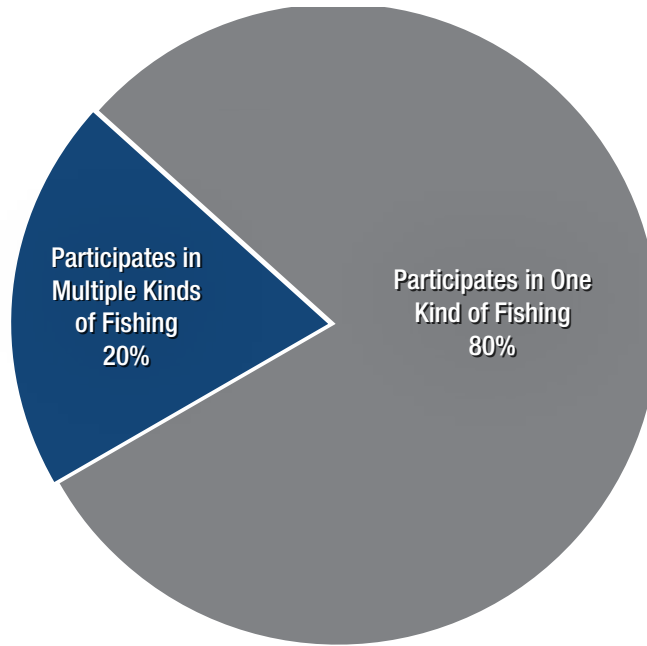
Top Fishing Venues

	Ages 6+
Boat	50.1%
Shoreline	49.2%
River Bank	41.4%
Pier/Jetty	25.6%
Kayak	2.6%
Other	6.0%



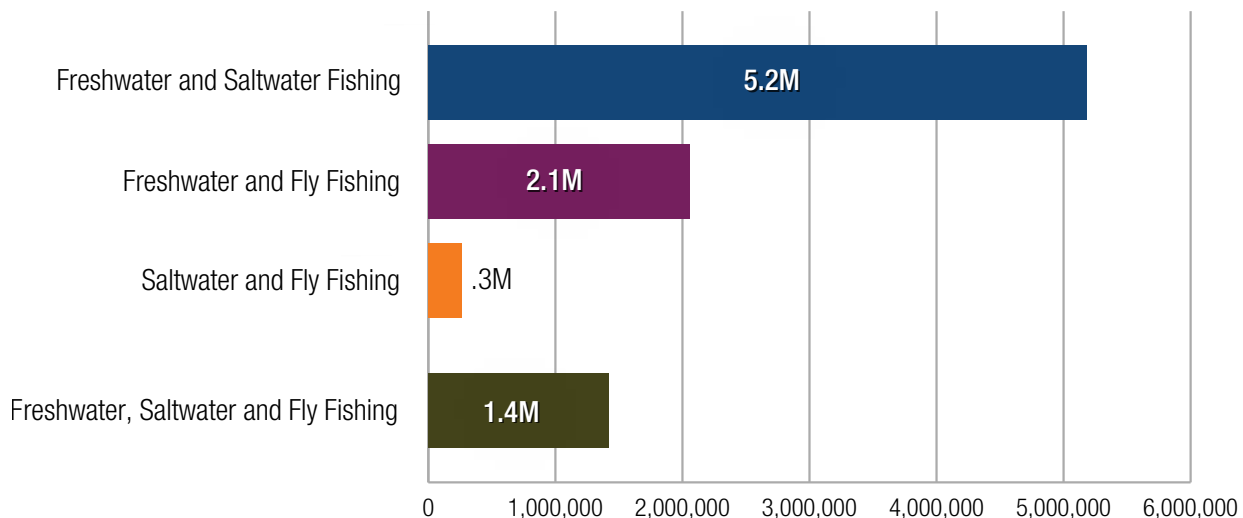
Overlap in Fishing Participation

A majority of America's fishing participants — 80 percent — participate in just one kind of fishing. Only 20 percent participate in multiple kinds of fishing.



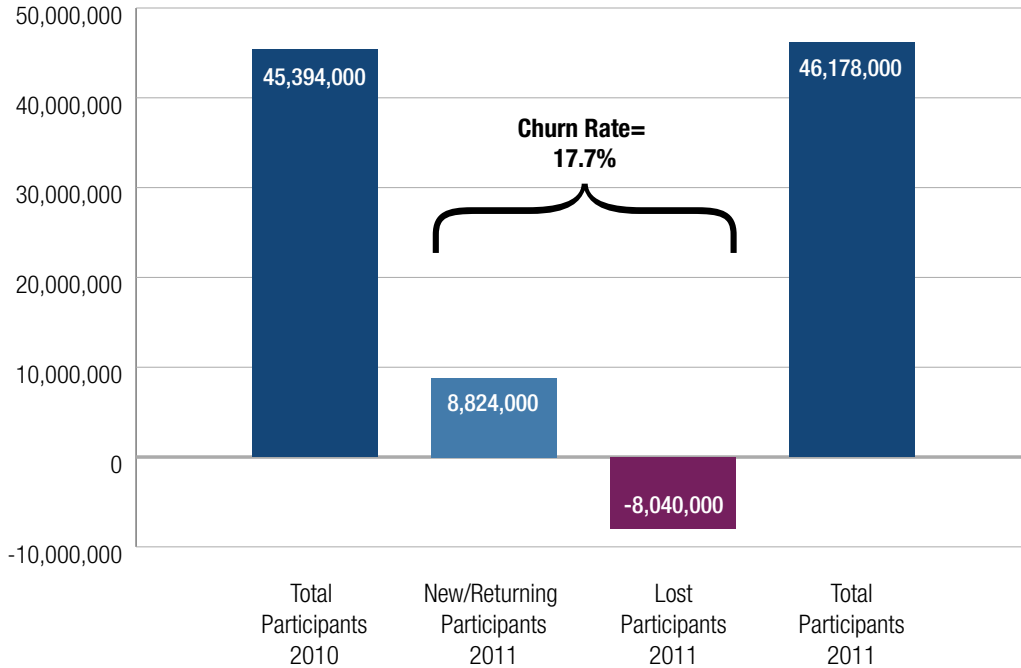
Participation Overlap by Fishing Type

The most common overlap in fishing participation is among fresh and saltwater participants. More than five million participants fish in both fresh and saltwater. A dedicated few participate in all three types of fishing. Out of 46.2 million total fishing participants, 1.4 million participate in freshwater, saltwater and fly fishing.



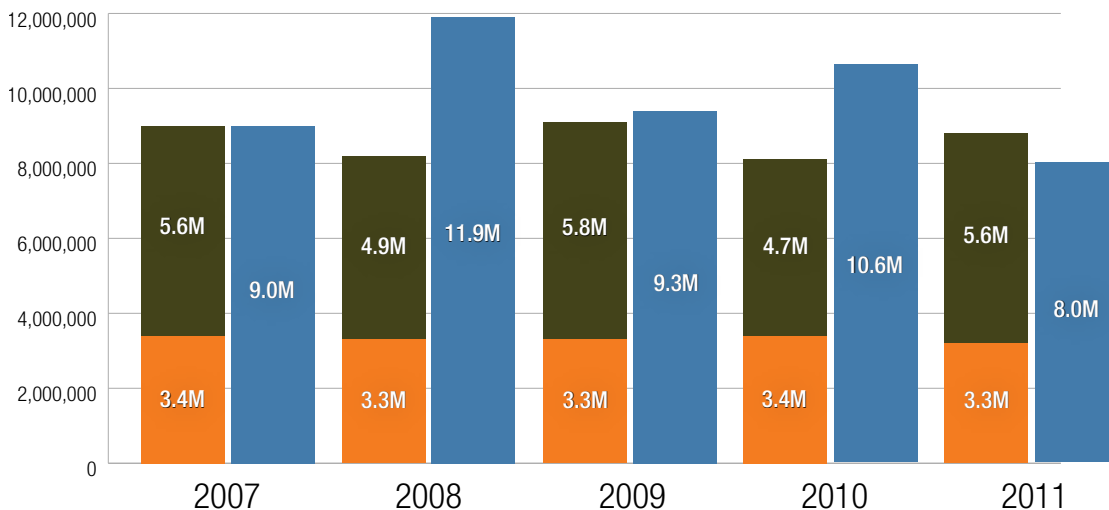
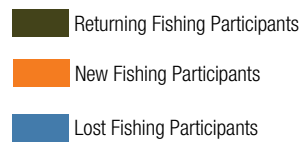
The Leaky Bucket

The “Leaky Bucket” analysis, one of the most interesting and important findings in this report, shows that fishing gained more participants than it lost in 2011. While eight million participants stopped fishing, 8.8 million former participants or new participants joined the sport. This equates to a gain of nearly 800,000 fishing participants and a churn rate of 17.7 percent.



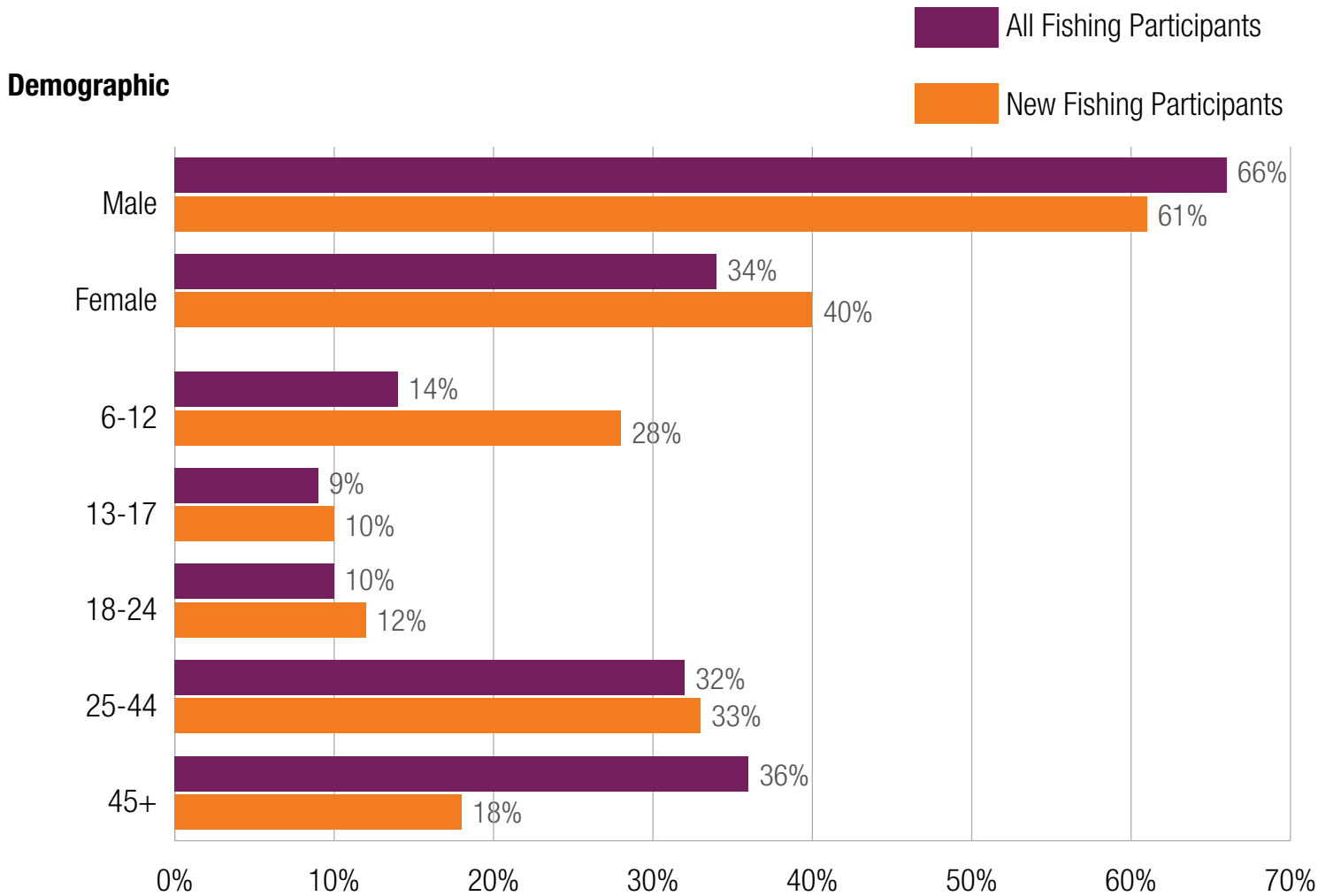
Trends in “Lost” Participants

For the first time in the history of this report, more participants joined or returned to fishing than left the activity. The addition of 800,000 participants in 2011 is a significant improvement over 2010 when the sport lost 2.5 million participants.



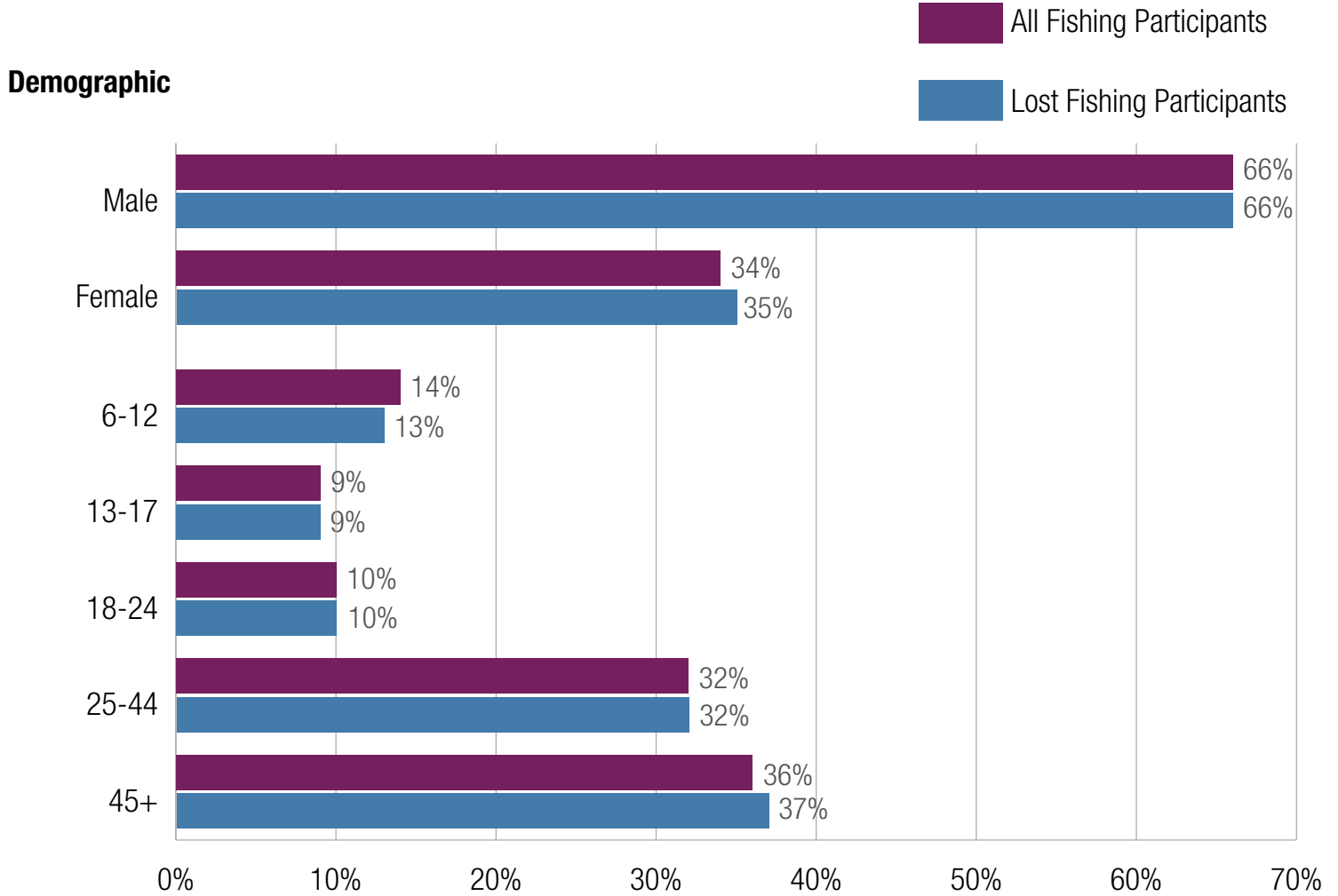
Who are the New Fishing Participants?

New fishing participants include females and youth ages six to 12. The sport of fishing is still male-dominated, but young girls are a growing group of fishing participants.



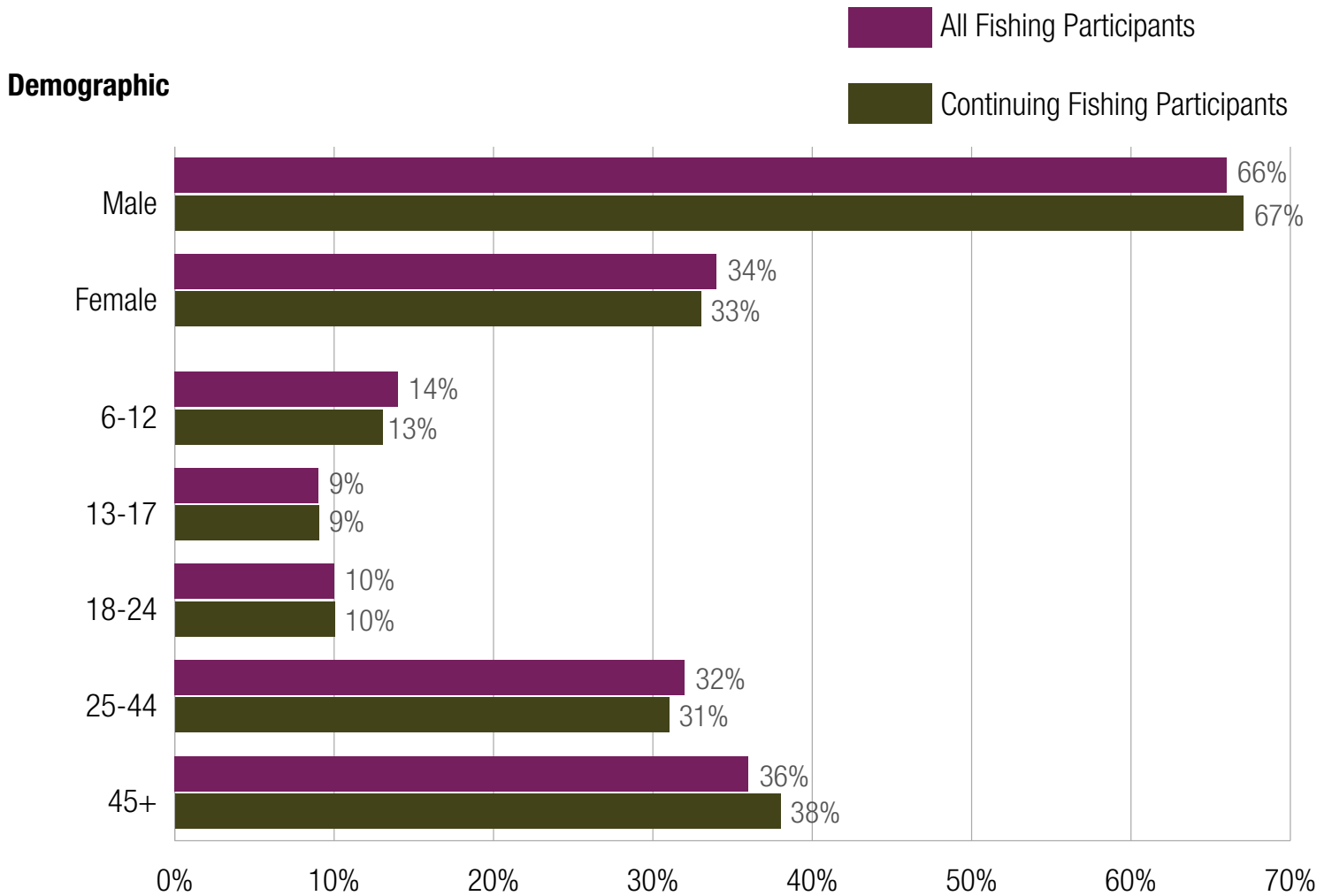
Who are the Lost Fishing Participants?

The profile of participants that decided to stop fishing is very similar to the profile of all fishing participants. Most are males over the age of 44.



Who are the Continuing Fishing Participants?

The profile of continuing fishing participants shows that slightly more males than females continued fishing from 2010 to 2011. Children ages six to 12 and adults ages 25 to 44 lost one percent of participants, while the oldest generation, ages 45 and up, gained two percent.





POTENTIAL NEW FISHING PARTICIPANTS

More than eight percent of Americans who do not currently participate in fishing are interested in taking up the sport. Of those, almost 40 percent are female, representing an opportunity to increase participation and grow the sport.

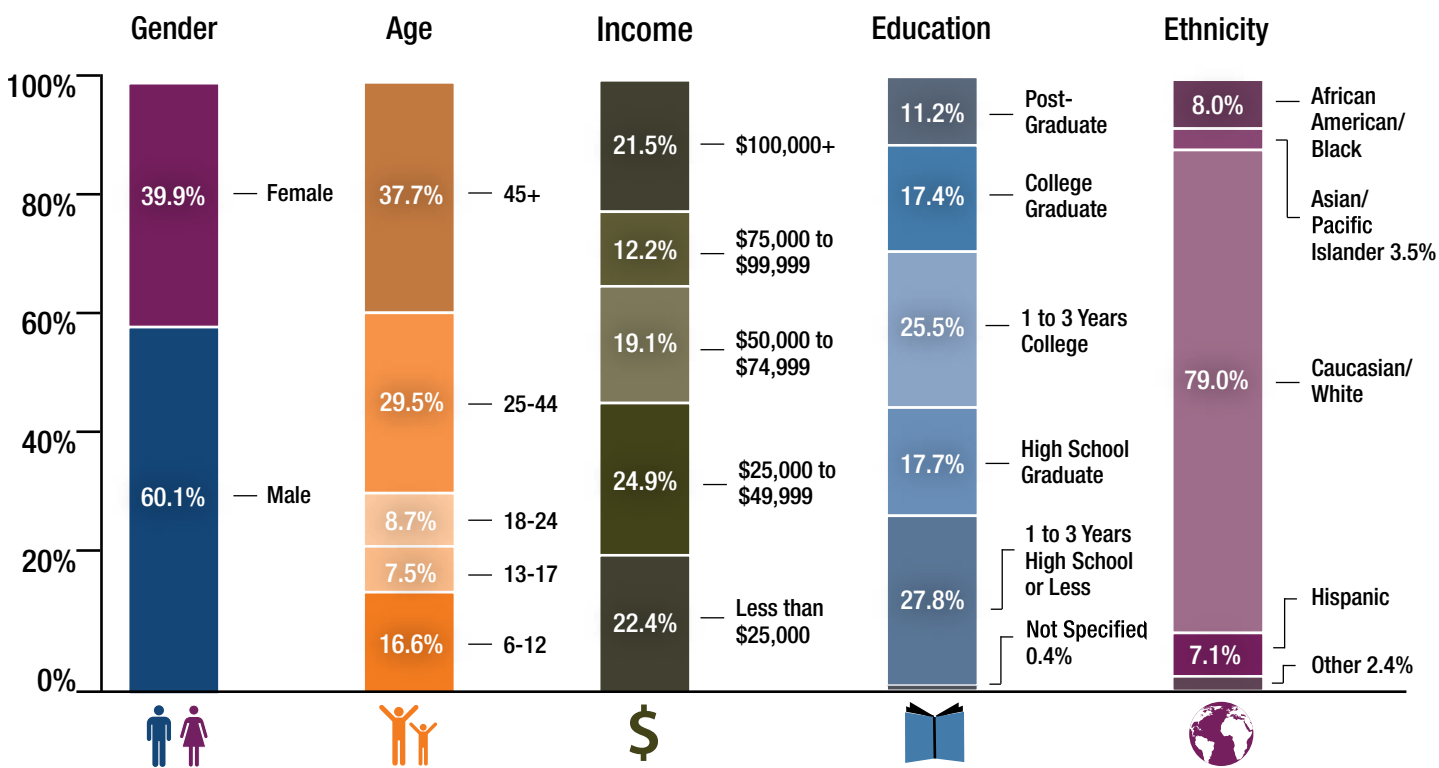
To attract more people and plug the “leaky bucket,” those considering participation in fishing must be understood and engaged. The following pages profile Americans, ages six and older, who do not currently fish but are interested in participating in the activity.



Fitness

Most potential new fishing participants are interested in outdoor activities because they provide exercise.

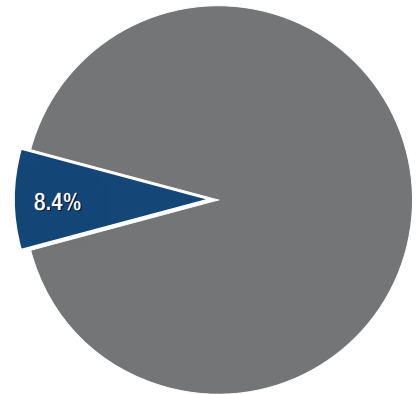
Demographics



Considering Participation in Fishing

Ages 6+

8.4% of Americans are considering participation in fishing.



Why Are You Interested in Outdoor Activities?

Based on 2010 data

Americans Ages 6+ Considering Participation in Fishing

	Ages 6 +
Outdoor activities are a good way to get exercise/stay fit	54.6%
I can do outdoor activities near my home	42.4%
Outdoor activities are cool	38.1%
I want to relax/manage stress	37.5%
Outdoor activities are affordable	36.1%
I want a change from my usual routine	32.6%
I want to try something new	28.7%
I like challenges	23.6%
My friends participate	18.7%
My parents, brothers, sisters, other relatives participate	16.6%
My kids are the right age now	13.6%
Outdoor activities look fun in magazines, books, websites, TV, movies	12.2%
A school, community, other organized program introduced me	5.3%
Other reason	6.8%

FRESHWATER FISHING

Freshwater fishing is, by far, the most popular kind of fishing. Almost 39 million Americans, or 13.6 percent of the population, went to lakes, rivers and streams to fish in 2011. Although the number of freshwater participants remained the same from 2010 to 2011, note that saltwater and fly fishing combined have about 21 million fewer participants than freshwater fishing.

Freshwater fishing is the most popular form of fishing among females, children and adolescents. Almost 34 percent of freshwater fishing participants are females and more than 23 percent are youth and adolescents ages six to 17.

Because most Americans have relatively easy access to freshwater fishing, participation is fairly spread out across the nation. At 19.7 percent, the East North Central Region, including the five states bordering the Great Lakes, has a slightly higher participation rate than other regions.

Total Participation

2006	43.1 million participants 16.3% of Americans ages 6+
2007	43.9 million participants 15.8% of Americans ages 6+
2008	40.3 million participants 14.4% of Americans ages 6+
2009	41.0 million participants 14.5% of Americans ages 6+
2010	38.9 million participants 13.7% of Americans ages 6+
2011	38.9 million participants 13.6% of Americans ages 6+

! Popular

Freshwater fishing is the most popular form of fishing with almost 39 million participants.



East North Central

19.7 percent of freshwater fishing participants live in the five states bordering the Great Lakes, a greater percentage than any other region.



30 Minutes or Less

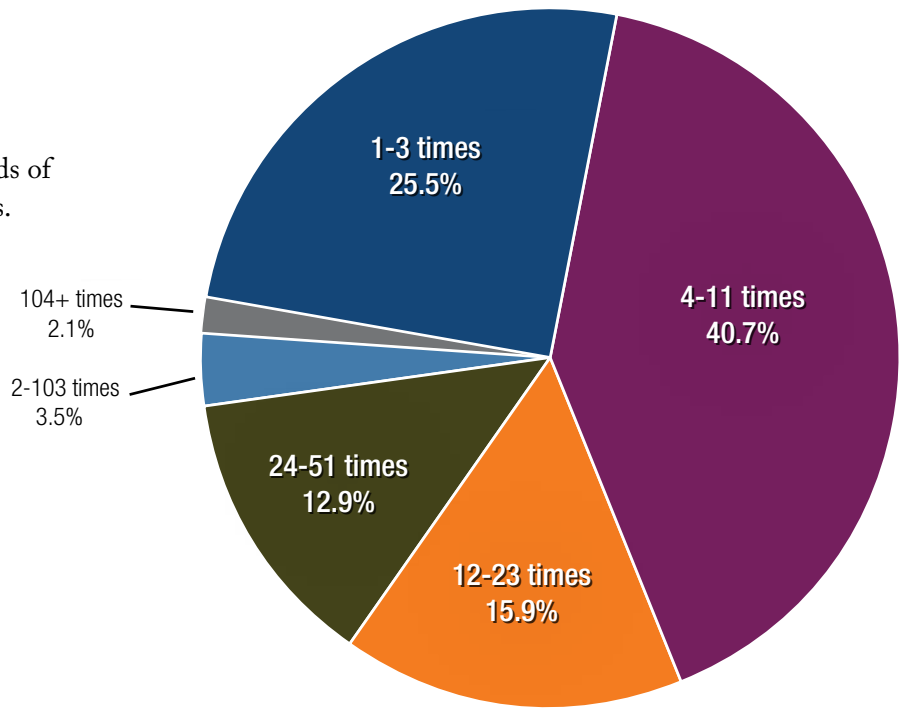
Freshwater fishing participants spend the least amount of time traveling to their fishing destinations with 46.2 percent traveling for 30 minutes or less.

Annual Outings

In 2011, freshwater fishing participants made 606 million annual outings — either close to home or on an overnight trip. About two-thirds of participants averaged 11 annual outings or less.

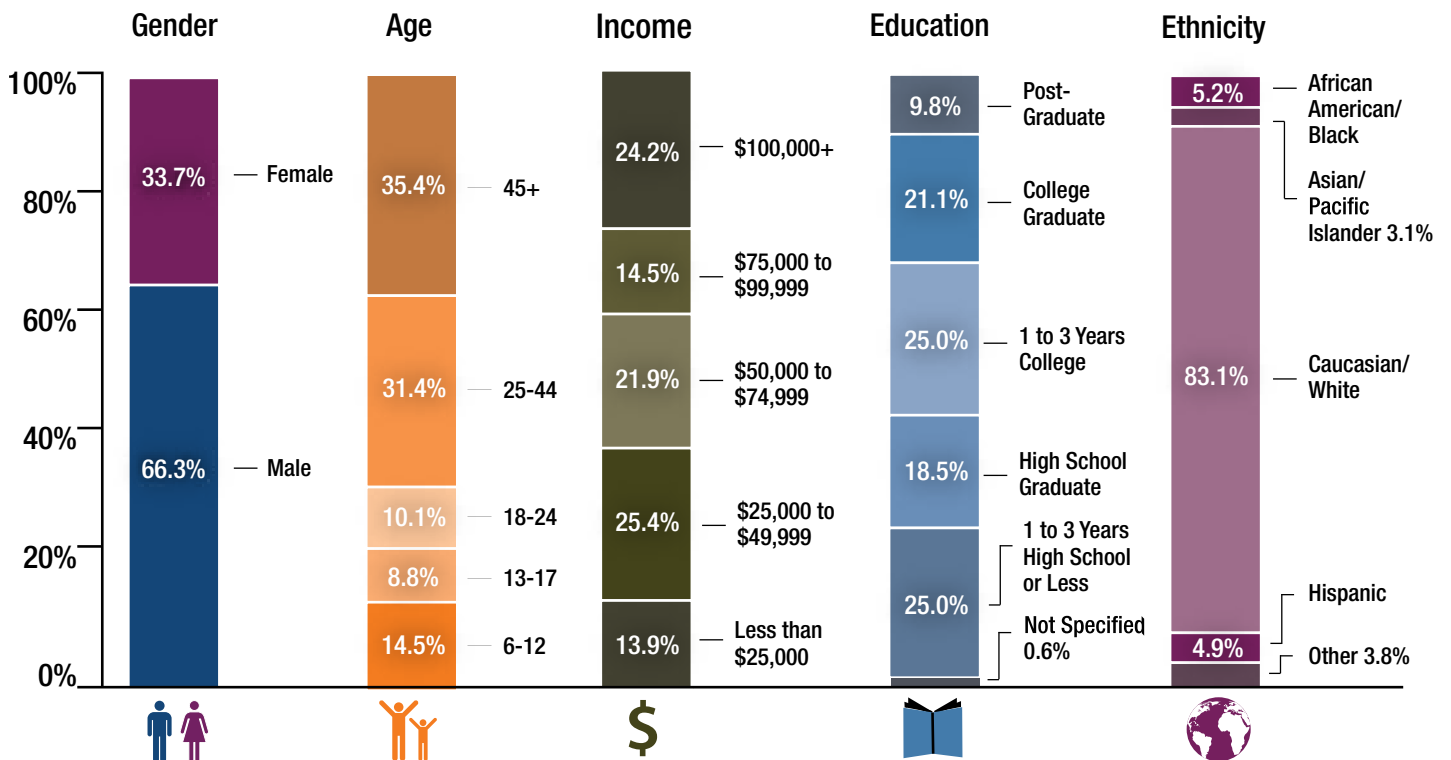
15.6 days

The average number of annual outings per freshwater fishing participant.



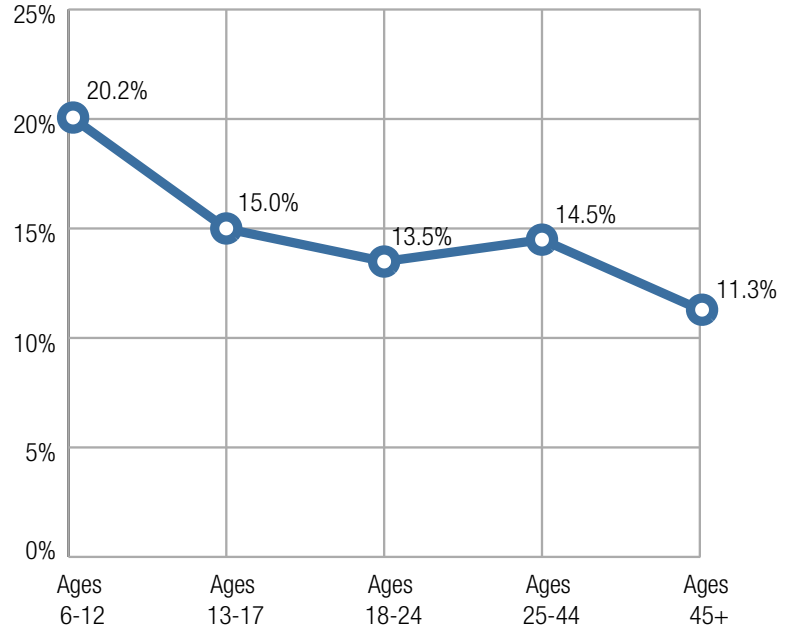
Annual Outings Among Freshwater Fishing Participants, Ages 6+

Demographics



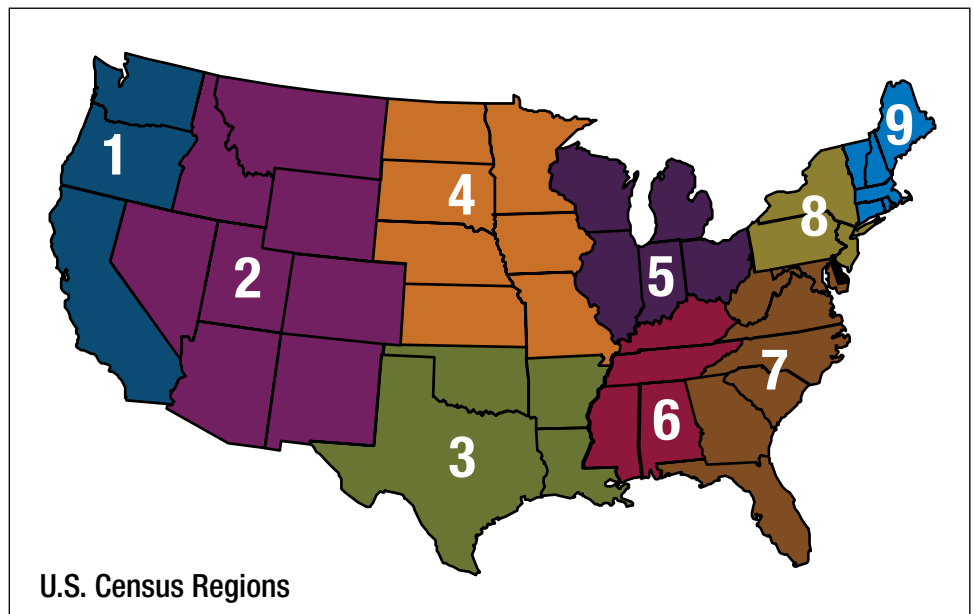
Participation Life Cycle

The participation rate among different age groups varies as individuals age and their lives are shaped by their environment and life experiences. A one-year snapshot of freshwater fishing participation helps describe this life cycle of participation.



Geography of Participants

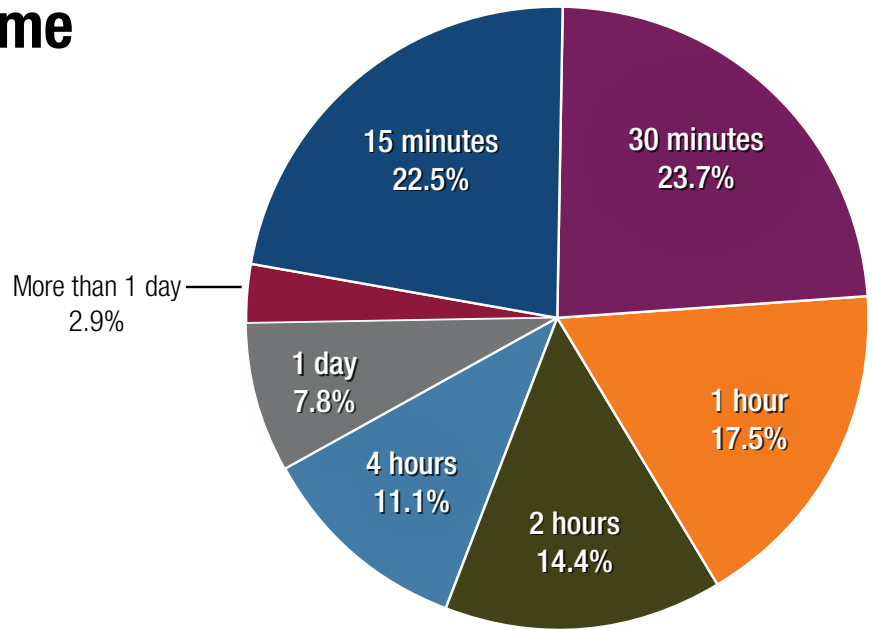
- 1. Pacific: **11.4%**
- 2. Mountain: **9.3%**
- 3. West South Central: **12.2%**
- 4. West North Central: **10.6%**
- 5. East North Central: **19.7%**
- 6. East South Central: **7.0%**
- 7. South Atlantic: **16.5%**
- 8. Middle Atlantic: **9.8%**
- 9. New England: **3.6%**



Time Traveled from Home

Based on 2010 data

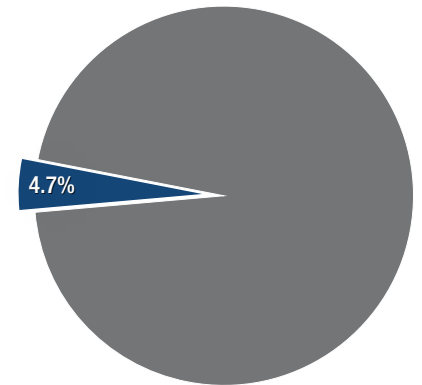
Freshwater fishing participants can travel anywhere from a few minutes to a few days from home to go fishing. Surveying the time freshwater participants traveled on their last in-season freshwater fishing trip reveals how far they usually travel and how often fishing leads them on more distant excursions.



Time Participants Traveled from Home on Their Last In-Season Freshwater Fishing Trip, Ages 6+

First-Time Participants

4.7% of freshwater fishing participants tried the sport for the first time in 2011.



Freshwater Fishing Participants, Ages 6+

Competition and Overnight Travel

Based on 2008 data

2.8% of freshwater fishing participants ages six and older compete in freshwater fishing.

38.3% of freshwater fishing participants ages six and older travel overnight to participate in freshwater fishing.

SALTWATER FISHING

Saltwater fishing is the second most popular type of fishing, including 12 million participants, or 4.2 percent of the population. Less accessible than freshwater fishing, saltwater fishing participants tend to live in the coastal United States. Almost 37 percent live in the southern states that border the Atlantic Ocean from Maryland to Florida.

Saltwater fishing participants tend to be Caucasian males over the age of 45. They are the wealthiest when compared to participants in the other categories with 32 percent earning more than \$100,000 per year.



South Atlantic

36.5 percent of saltwater fishing participants live along the southeastern coast, a significantly higher percentage than any other region.



Adult Participation

Unlike other fishing types, saltwater fishing participation is highest among adults ages 25 to 44.



4 Hours or More

Saltwater fishing participants spend the most amount of time traveling to their fishing destinations with 36.8 percent traveling for four hours or more.

Total Participation

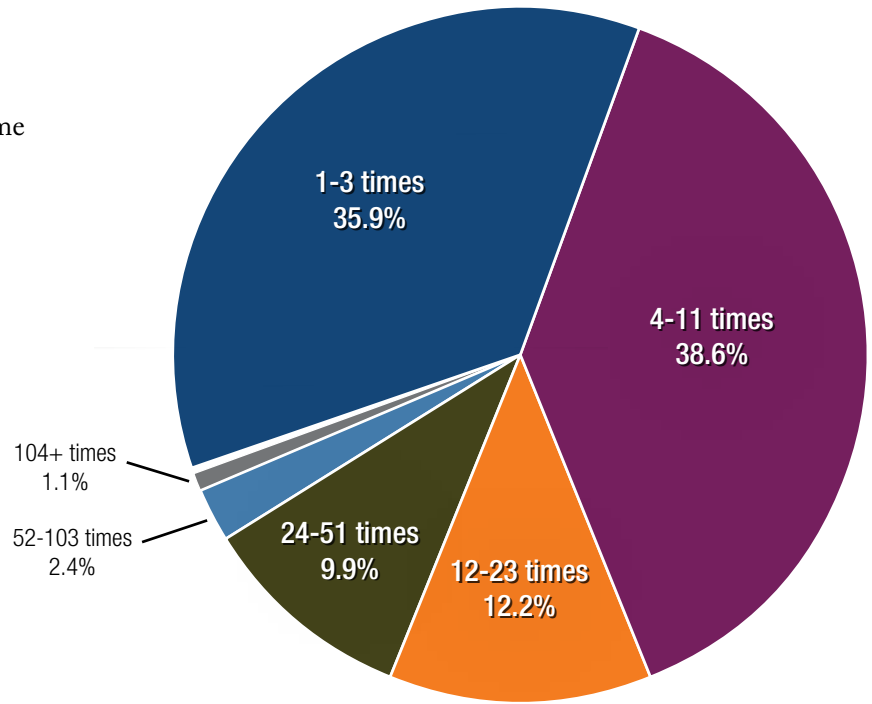
2006	12.5 million participants 4.6% of Americans ages 6+
2007	14.4 million participants 5.2% of Americans ages 6+
2008	13.8 million participants 4.9% of Americans ages 6+
2009	12.3 million participants 4.4% of Americans ages 6+
2010	11.8 million participants 4.2% of Americans ages 6+
2011	12.0 million participants 4.2% of Americans ages 6+

Annual Outings

In 2011, saltwater fishing participants made 153 million annual outings — either close to home or on an overnight trip. Nearly three-fourths of participants made an average of one outing per month or less.

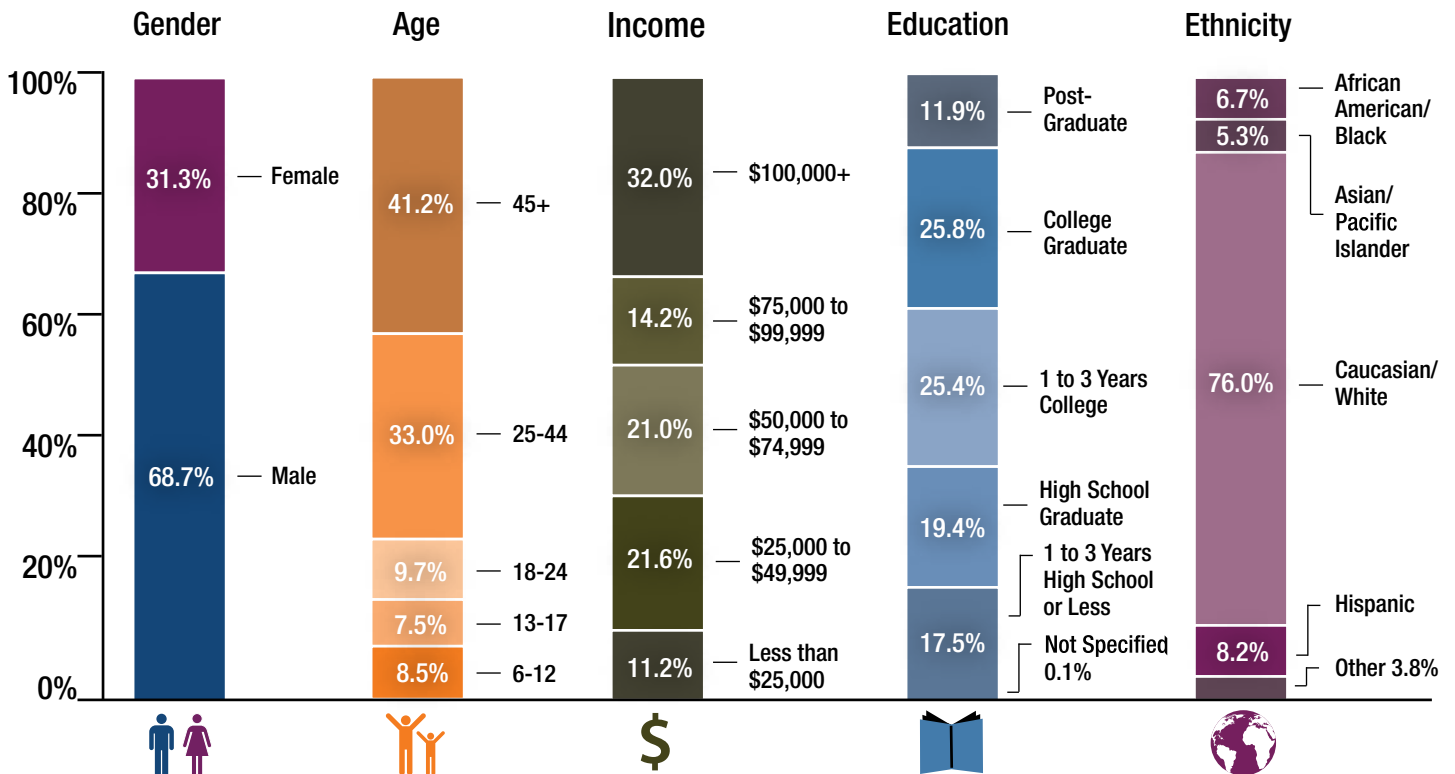
12.8 days

The average number of annual outings per saltwater fishing participant.



Annual Outings Among Saltwater Fishing Participants, Ages 6+

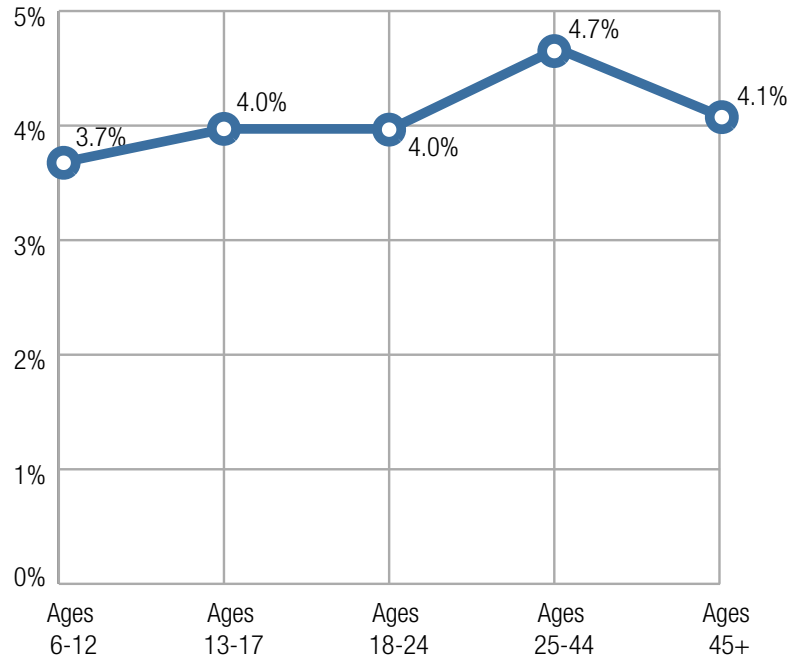
Demographics



Participation Life Cycle

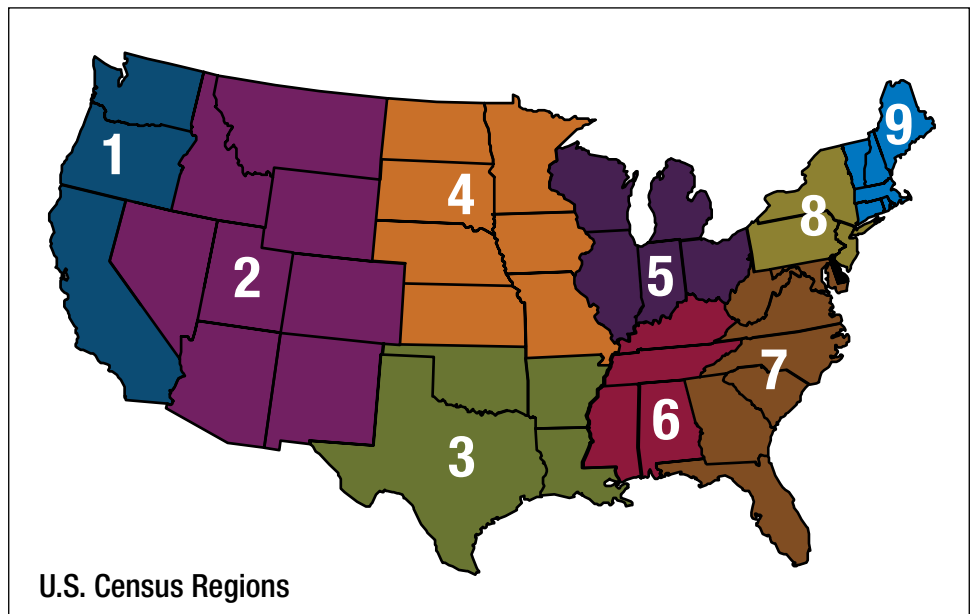
The participation rate among different age groups varies as individuals age and their lives are shaped by their environment and life experiences. A one-year snapshot of saltwater fishing participation helps describe this life cycle of participation.

Unlike many other outdoor activities, saltwater fishing participation increases among adults ages 25 to 44, rising higher than participation among ages six to 24.



Geography of Participants

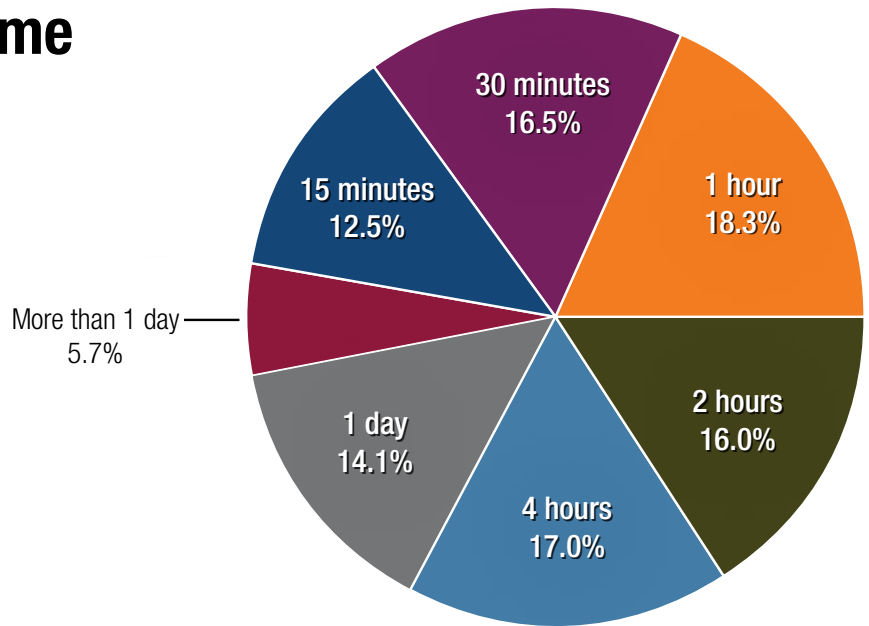
- 1. Pacific: **13.3%**
- 2. Mountain: **2.0%**
- 3. West South Central: **15.2%**
- 4. West North Central: **2.2%**
- 5. East North Central: **5.3%**
- 6. East South Central: **4.1%**
- 7. South Atlantic: **36.5%**
- 8. Middle Atlantic: **14.7%**
- 9. New England: **6.7%**



Time Traveled from Home

Based on 2010 data

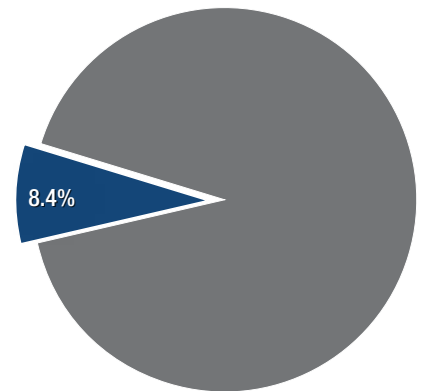
Saltwater fishing participants can travel anywhere from a few minutes to a few days from home to go fishing. Surveying the time saltwater participants traveled on their last in-season saltwater fishing trip reveals how far they usually travel and how often fishing leads them on more distant excursions.



Time Participants Traveled from Home on Their Last In-Season Saltwater Fishing Trip, Ages 6+

First-Time Participants

8.4% of saltwater fishing participants tried the sport for the first time in 2011.



Saltwater Fishing Participants, Ages 6+

Competition and Overnight Travel

Based on 2008 data

1.8% of saltwater fishing participants ages six and older compete in saltwater fishing.

44.4% of saltwater fishing participants ages six and older travel overnight to participate in saltwater fishing.

FLY FISHING

There are 5.7 million fly fishing participants in the United States, accounting for two percent of the population. Although fly fishing has the fewest number of participants, it has the highest rate of first-time participants. In fact, 14.4 percent of fly fishing participants tried the activity for the first time in 2011, which is good news for those recruiting new fly fishing enthusiasts.

Fly fishing is popular among men, with males making up 76.4 percent of all participants. Participants also tend to be older and more educated than those in other categories. More than 42 percent of participants are over the age of 45, and more than 44 percent have a college or post-graduate degree.

Total Participation

2006	6.1 million participants 2.2% of Americans ages 6+
2007	5.8 million participants 2.1% of Americans ages 6+
2008	5.9 million participants 2.1% of Americans ages 6+
2009	5.6 million participants 2.0% of Americans ages 6+
2010	5.5 million participants 1.9% of Americans ages 6+
2011	5.7 million participants 2.0% of Americans ages 6+



Males

76.4 percent of fly fishing participants are male, higher than any other group.



Middle Atlantic

Most fly fishing participants live in New York, New Jersey or Pennsylvania.



New Participants

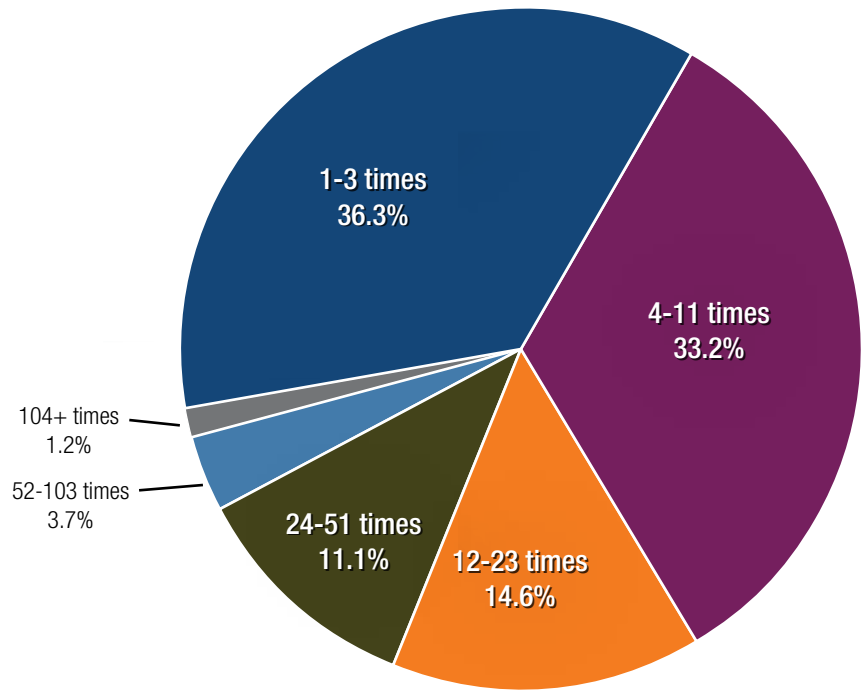
Fly fishing has the highest rate of first-time participants at 14.4 percent.

Annual Outings

In 2011, fly fishing participants made 81 million annual outings — either close to home or on an overnight trip. More than one-third of fly fishing participants went an average of once per month or more.

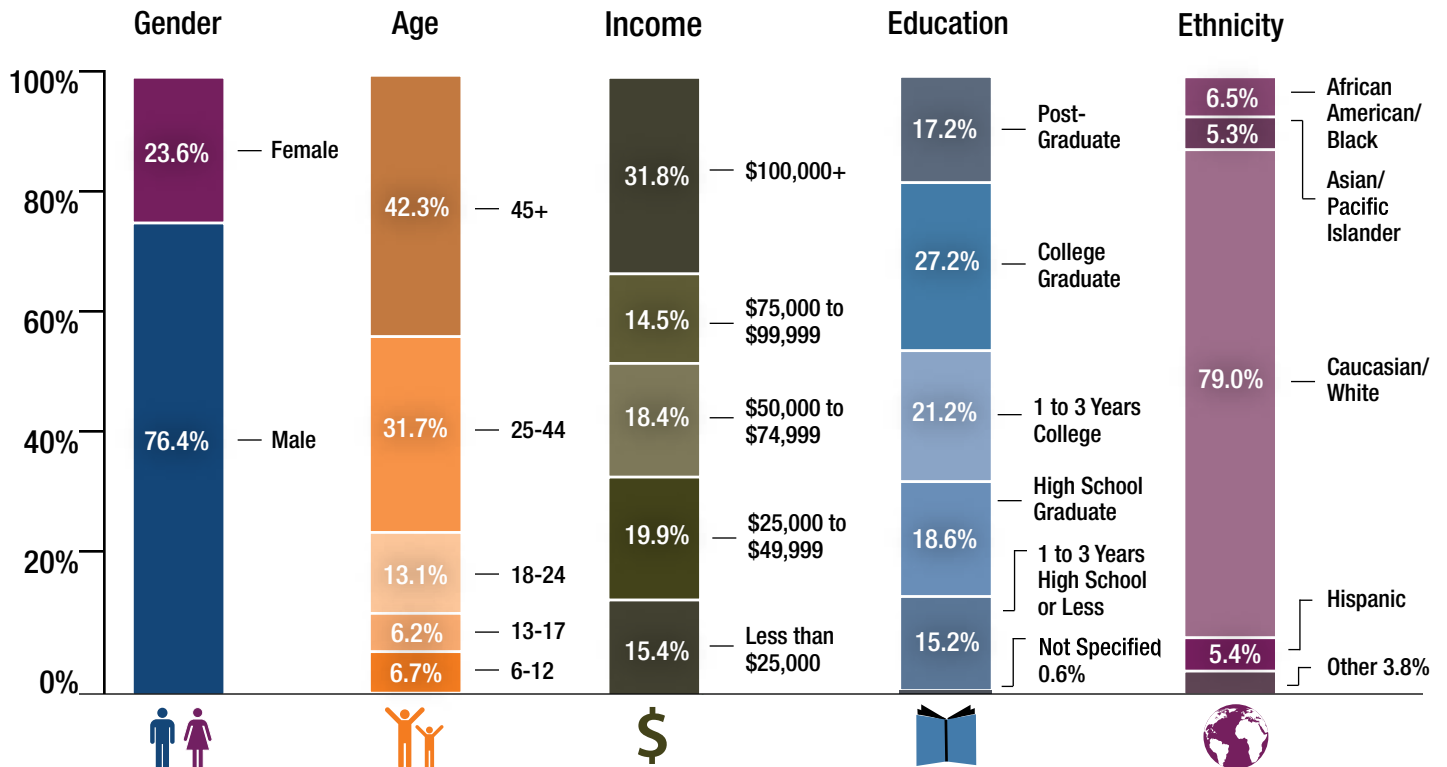
14.2 days

The average number of annual outings per fly fishing participant.



Annual Outings Among Fly Fishing Participants, Ages 6+

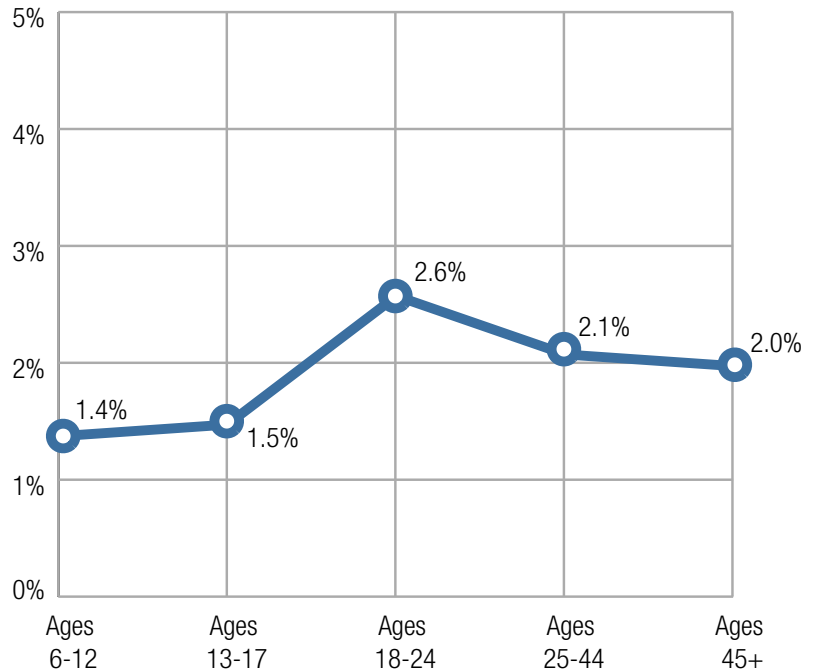
Demographics



Participation Life Cycle

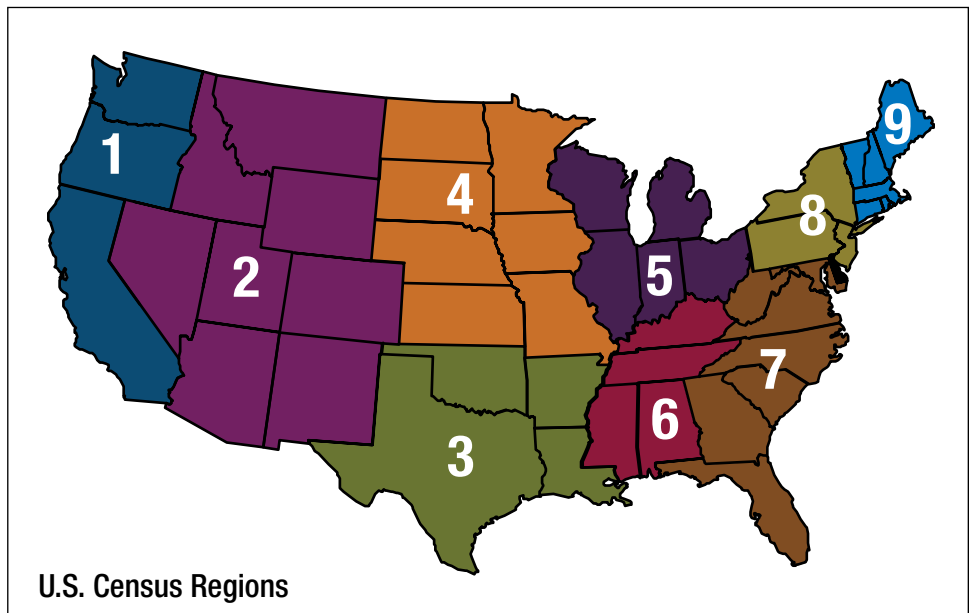
The participation rate among different age groups varies as individuals age and their lives are shaped by their environment and life experiences. A one-year snapshot of fly fishing participation helps describe this life cycle of participation.

Fly fishing participation increases among those ages 18 to 24. Although the gain is modest, participation rates in all other fishing types either remain the same or drop from adolescence to adulthood.



Geography of Participants

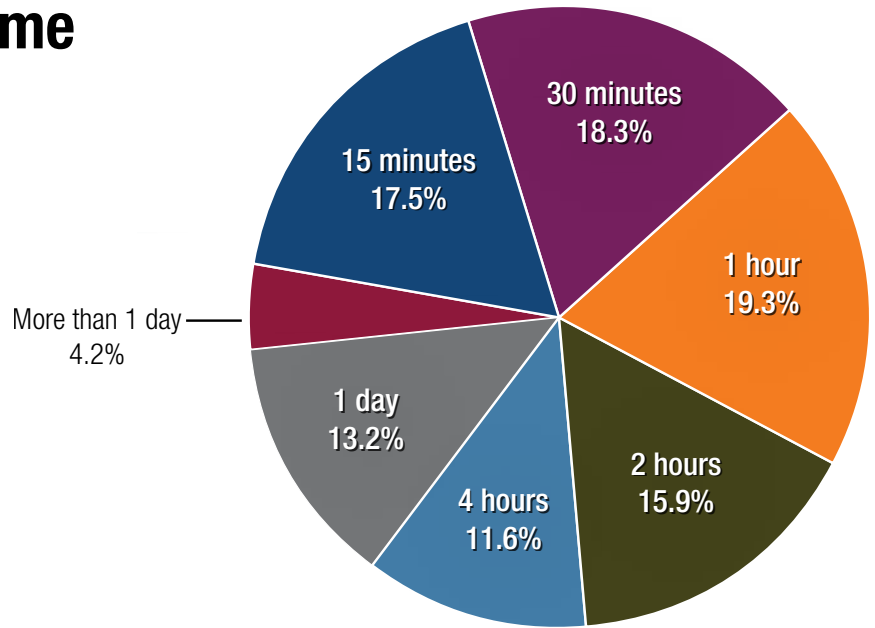
1. Pacific: **15.1%**
2. Mountain: **14.4%**
3. West South Central: **9.8%**
4. West North Central: **6.1%**
5. East North Central: **12.2%**
6. East South Central: **3.8%**
7. South Atlantic: **15.6%**
8. Middle Atlantic: **16.6%**
9. New England: **6.4%**



Time Traveled from Home

Based on 2010 data

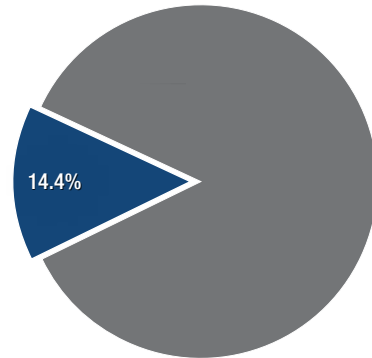
Fly fishing participants can travel anywhere from a few minutes to a few days from home to go fishing. Surveying the time fly fishing participants traveled on their last in-season fly fishing trip reveals how far they usually travel and how often fishing leads them on more distant excursions.



Time Participants Traveled from Home on Their Last In-Season Fly Fishing Trip, Ages 6+

First-Time Participants

14.4% of fly fishing participants tried the sport for the first time in 2011.



Competition and Overnight Travel

Based on 2008 data

20.1% of fly fishing participants ages six and older compete in fly fishing.

45.2% of fly fishing participants ages six and older travel overnight to participate in fly fishing.

YOUTH

Typical of most outdoor activities, fishing participation rates peak between the ages of six and 12 and then decrease during the adolescent years from 13 to 17. Almost 23 percent, or 6.3 million, of those in the youngest age bracket participate in fishing. The number of participants decreases to four million, or 17.7 percent, among adolescents.

While the participation rate among children slightly improved by one percentage point from 2010 to 2011, the adolescent participation rate lost about one percentage point. This drop widened the childhood to adolescence participation loss rate to 4.9 percent, up from 3.3 percent in 2010.

Total Participation

2007	Ages 6-12	7.9 million participants 27.8% of age group
	Ages 13-17	4.5 million participants 20.5% of age group
2008	Ages 6-12	6.7 million participants 24.8% of age group
	Ages 13-17	4.5 million participants 20.2% of age group
2009	Ages 6-12	6.9 million participants 25.4% of age group
	Ages 13-17	4.3 million participants 19.0% of age group
2010	Ages 6-12	6.0 million participants 21.9% of age group
	Ages 13-17	4.2 million participants 18.6% of age group
2011	Ages 6-12	6.3 million participants 22.6% of age group
	Ages 13-17	4.0 million participants 17.7% of age group



10.3 Million

More than 10 million Americans ages six to 17 participated in fishing in 2011.



Parents

81.8 percent of fishing participants ages six to 12 are introduced to outdoor activities by their parents.

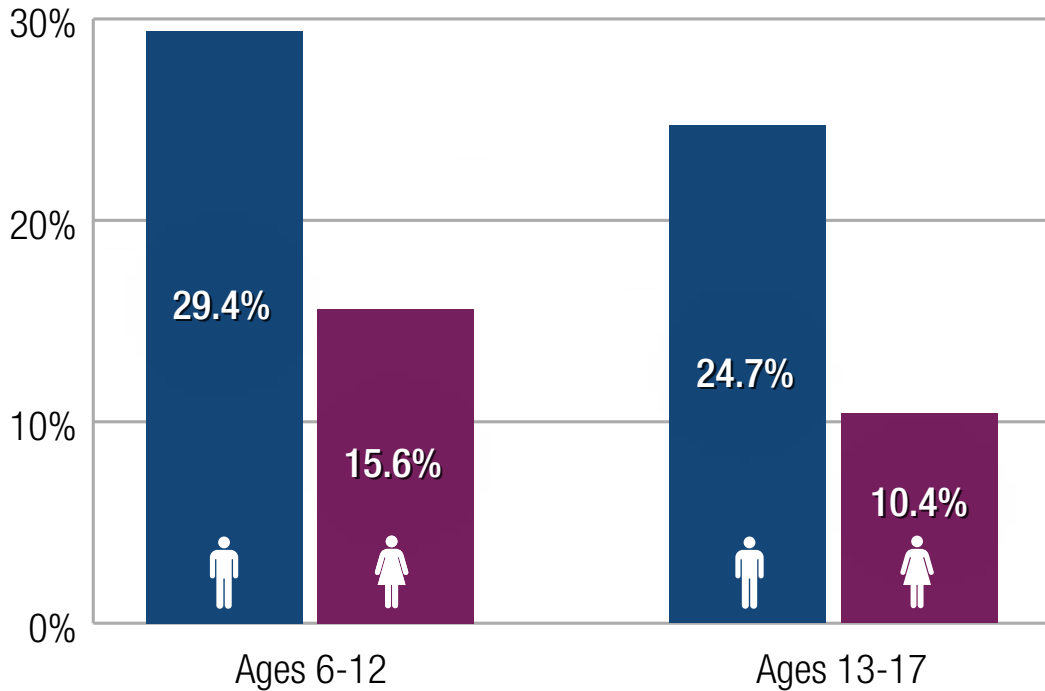


Boating

Almost 44 percent of youth fishing participants ages six to 17 also participate in boating.

Youth Participation in Fishing by Gender

Like participation in many outdoor activities, boys' and girls' participation in fishing declines from childhood, ages six to 12, to adolescence, ages 13 to 17. Participation among girls declines slightly more than among boys.



Who Introduces Youth Fishing Participants to Outdoor Activities?

Based on 2010 data

“Who influenced your decision to participate in outdoor activities?”	Ages 6 to 12	Ages 13 to 17
Parents	81.8%	76.6%
Brothers, sisters, or other relatives	39.8%	29.1%
Friends	31.0%	46.9%
Community program (Boy Scouts, YMCA, neighborhood program)	13.8%	12.9%
School program	9.2%	10.9%
Myself (no one else influenced me)	9.1%	12.7%
TV programs, movies, magazines, books, websites about the outdoors	4.8%	5.1%
Something else not listed	3.4%	2.1%
Experienced mentor (trained and skilled)	1.8%	4.4%
Media icon, sports figure, accomplished athlete	1.3%	0.8%
Outdoor education program such as Outward Bound	0.7%	2.2%

Crossover Participation

Youth Ages 6 to 17

Outdoor Activities

1. Car, Backyard or RV Camping **47.1%**
2. Road, Mountain or BMX Bicycling **43.4%**
3. Running, Jogging or Trail Running **27.4%**
4. Hiking **23.6%**
5. Paddling **16.9%**

Indoor Fitness Activities

1. Free Weights **17.0%**
2. Treadmill **11.1%**
3. Weight/Resistance Machines **10.9%**
4. Stretching **9.1%**
5. Home Gym Exercise **8.6%**

Team Sports

1. Basketball **27.4%**
2. Baseball **24.5%**
3. Football **23.4%**
4. Soccer **23.3%**
5. Volleyball **9.1%**

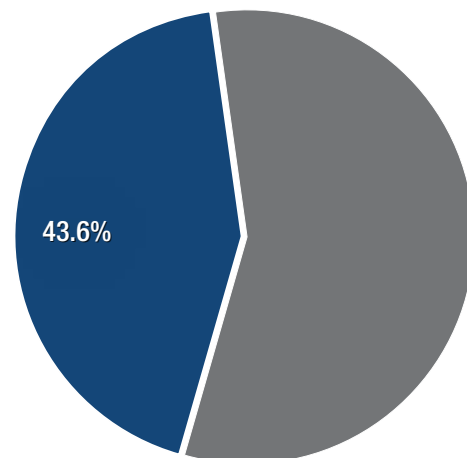
Other Activities

1. Bowling **42.8%**
2. Fitness Walking **26.1%**
3. Shooting and Target Shooting **15.7%**
4. Billiards **15.6%**
5. Table Tennis **14.7%**

Crossover Participation in Boating

Youth Ages 6 to 17

43.6% of youth fishing participants also participated in boating in 2011.



Youth Fishing Participants, Ages 6-17



POTENTIAL NEW YOUTH FISHING PARTICIPANTS

There is a great opportunity to engage young minority populations in fishing. Almost 11 percent of Hispanic youth and 9.5 percent of African American youth say they are interested in fishing.

Connecting with youth is essential to building a strong fishing base. The following pages help describe the demographics and motivations of those young people who do not participate in fishing but are interested in becoming active in the sport.



Males

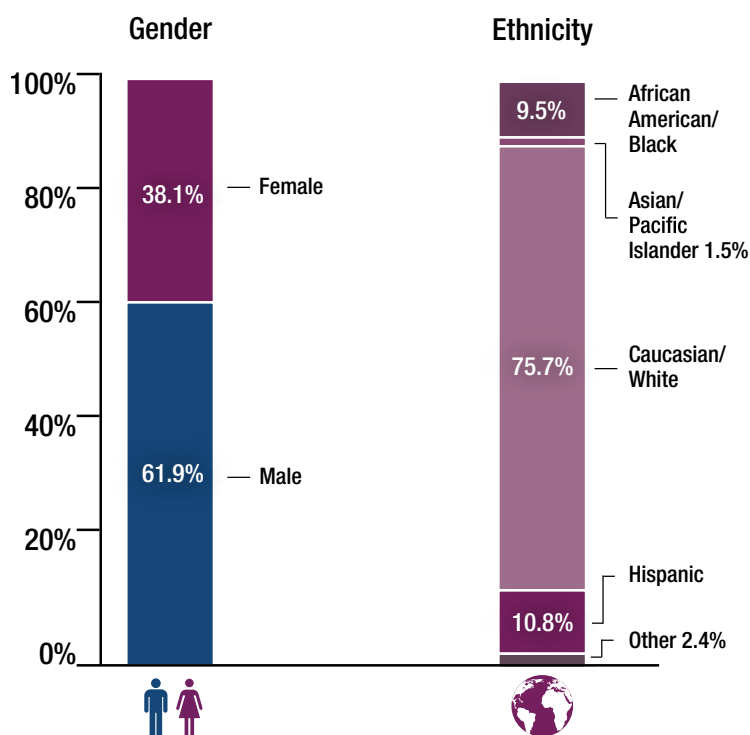
Almost 62 percent of youth considering participation in fishing are male.

Demographics



Parents

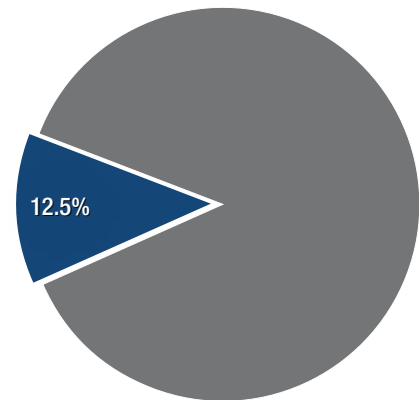
More than 50 percent of adolescents considering participation in fishing are interested because their parents and other relatives participate.



Youth Considering Participation in Fishing

Americans Ages 6 to 17

12.5% of youth are considering participation in fishing.



Why Are You Interested in Outdoor Activities?

Americans Ages 6 to 17 Considering Participation in Fishing

Based on 2010 data

	Ages 6-12	Ages 13-17
Outdoor activities are cool	48.1%	49.9%
My friends participate	29.4%	34.3%
My parents/brothers/sisters/other relatives participate	38.5%	50.3%
A school/community/other organized program introduced me	15.6%	11.6%
Outdoor activities look fun in magazines/books/websites/TV/movies	17.7%	14.8%
Outdoor activities are a good way to get exercise/stay fit	39.0%	48.9%
I want to try something new	33.1%	28.1%
I like challenges	18.9%	29.6%
I want a change from my usual routine	13.8%	20.0%
I can do outdoor activities near my home	34.0%	40.4%
Outdoor activities are affordable	18.6%	33.2%
I want to relax / manage stress	15.0%	10.9%
My kids are the right age now	9.0%	2.6%
Other reason	6.7%	0.0%

HISPANICS

Although Hispanics are the largest minority group in the United States, they make up only 11.9 percent of America's fishing participants. At a participation rate of nine percent, freshwater fishing is the most popular kind of fishing among Hispanics.

Hispanic American fishing participants fish a lot compared to other groups. Hispanics fish the most often out of any fishing category or demographic group, averaging 20 fishing days per year.

Total Participation

2007 2.1 million participants
16.1% of Hispanics ages 6+

11.9% Freshwater Fishing
7.6% Saltwater Fishing
1.9% Fly Fishing

2008 2.4 million participants
13.7% of Hispanics ages 6+

10.4% Freshwater Fishing
6.2% Saltwater Fishing
1.5% Fly Fishing

2009 2.6 million participants
13.6% of Hispanics ages 6+

10.6% Freshwater Fishing
4.8% Saltwater Fishing
1.7% Fly Fishing

2010 3.4 million participants
14.5% of Hispanics ages 6+

11.0% Freshwater Fishing
5.7% Saltwater Fishing
1.7% Fly Fishing

2011 3.1 million participants
11.9% of Hispanics ages 6+

9.0% Freshwater Fishing
4.6% Saltwater Fishing
1.4% Fly Fishing



Adult Participation

Unlike overall fishing participation, Hispanic fishing participation reaches its highest rate among those adults ages 45 and up.



West South Central

24 percent of Hispanic fishing participants live in Texas, Louisiana, Arkansas and Oklahoma.



Fitness Walking

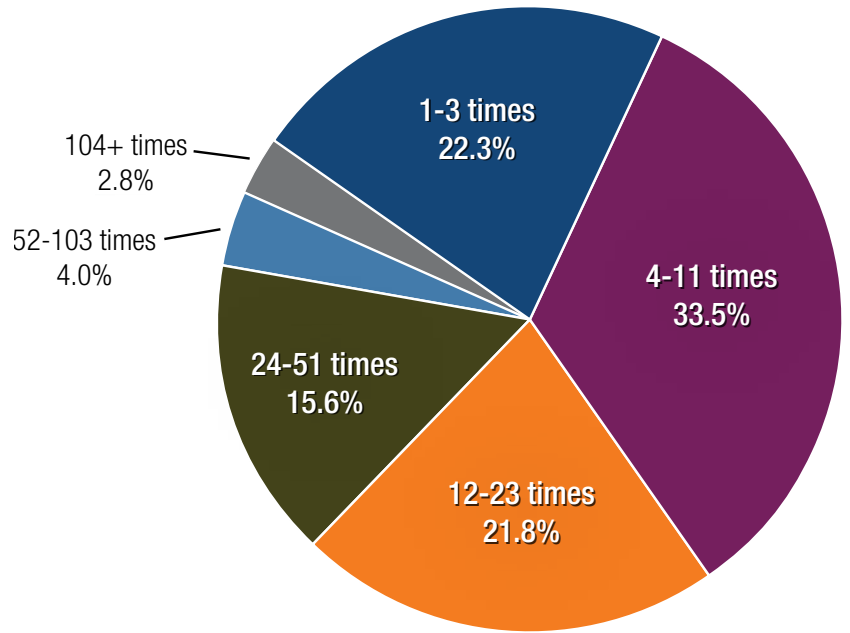
More than 49 percent of Hispanic fishing participants also participate in fitness walking.

Annual Outings

In 2011, Hispanic fishing participants made more than 62 million annual outings — either close to home or on an overnight trip. More than half of participants made one per season or less.

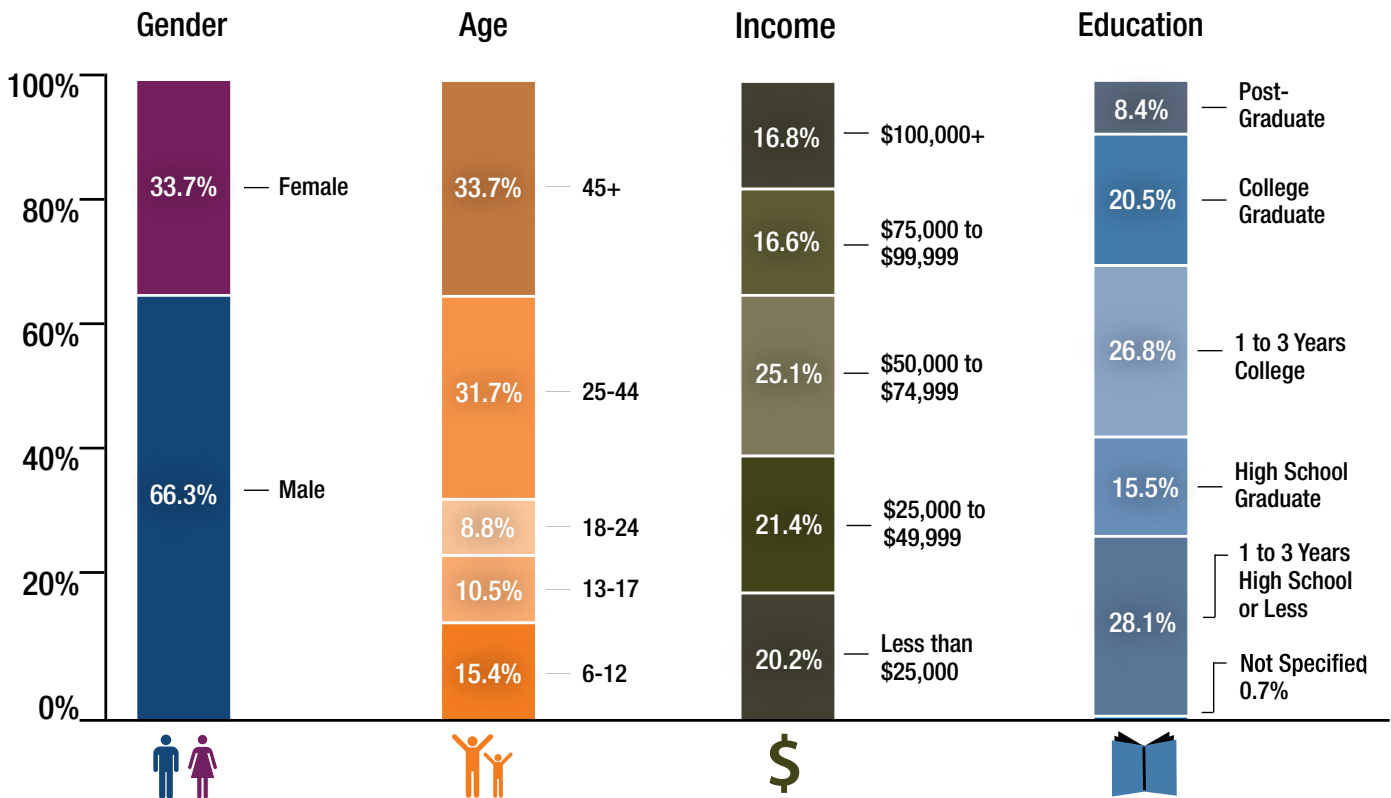
20.0 days

The average number of annual outings per Hispanic fishing participant.



Annual Outings Among Hispanic Fishing Participants, Ages 6+

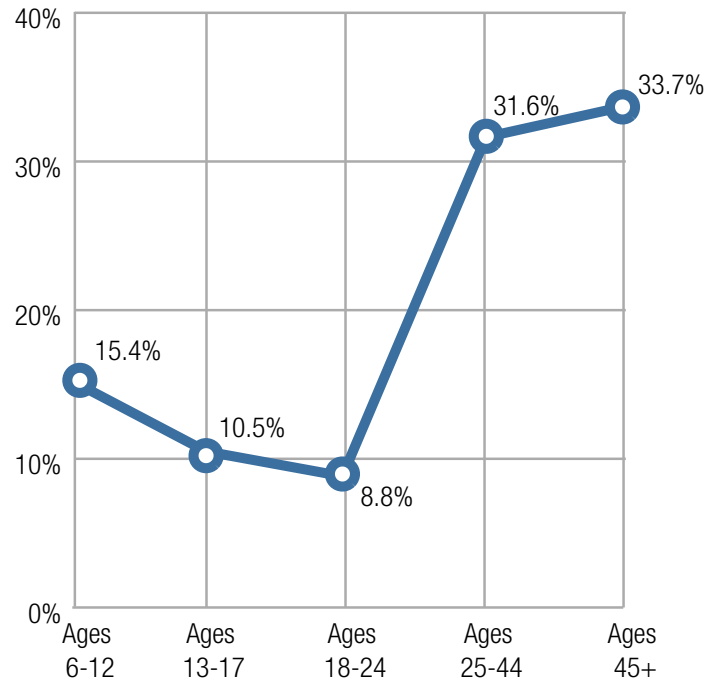
Demographics



Participation Life Cycle

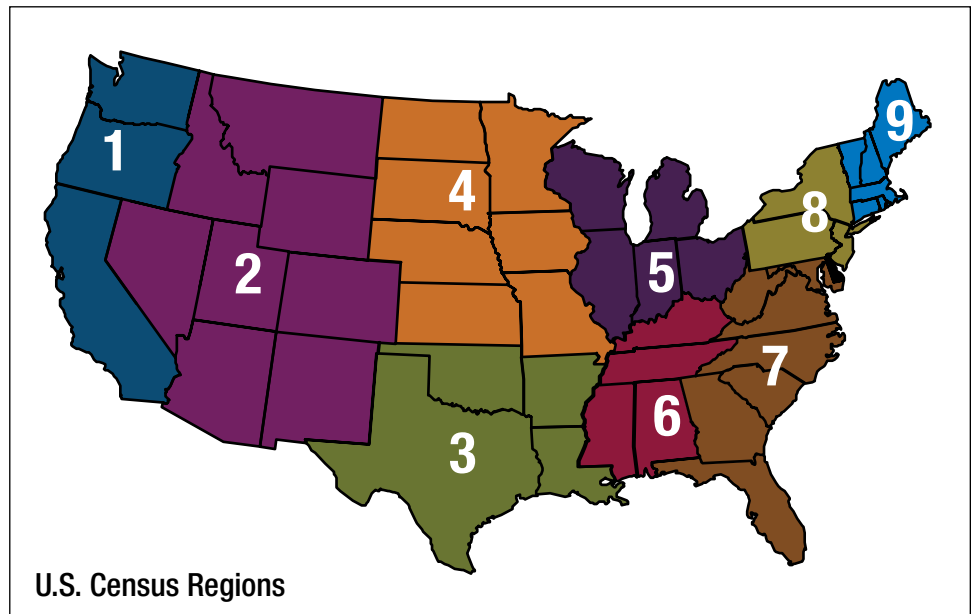
The participation rate among different age groups varies as individuals age and their lives are shaped by their environment and life experiences. A one-year snapshot of Hispanic fishing participation helps describe this life cycle of participation.

The Hispanic life cycle of fishing participation is different from those of other outdoor activities. Like some outdoor activities, participation rates decline during adolescence and young adulthood; however, rates jump among participants ages 24 to 44 and continue to climb for those ages 45 and up.



Geography of Participants

- 1. Pacific: **16.4%**
- 2. Mountain: **15.5%**
- 3. West South Central: **24.0%**
- 4. West North Central: **4.8%**
- 5. East North Central: **10.8%**
- 6. East South Central: **0.5%**
- 7. South Atlantic: **13.8%**
- 8. Middle Atlantic: **10.2%**
- 9. New England: **4.0%**



Crossover Participation

Hispanics Ages 6+

What are the top outdoor, fitness, team/ball and other activities and sports enjoyed by Hispanic fishing participants ages six and older?

Outdoor Activities

1. Car, Backyard or RV Camping **41.6%**
2. Road, Mountain or BMX Bicycling **35.0%**
3. Running, Jogging or Trail Running **30.3%**
4. Wildlife Viewing or Bird Watching **21.0%**
5. Hiking **20.4%**

Team Sports

1. Basketball **16.6%**
2. Football **15.4%**
3. Baseball **9.9%**
4. Soccer **9.3%**
5. Softball **7.9%**

Indoor Fitness Activities

1. Free Weights **35.2%**
2. Treadmill **23.8%**
3. Weight/Resistance Machines **21.1%**
4. Home Gym Exercise **19.2%**
5. Stationary Cycling **18.3%**

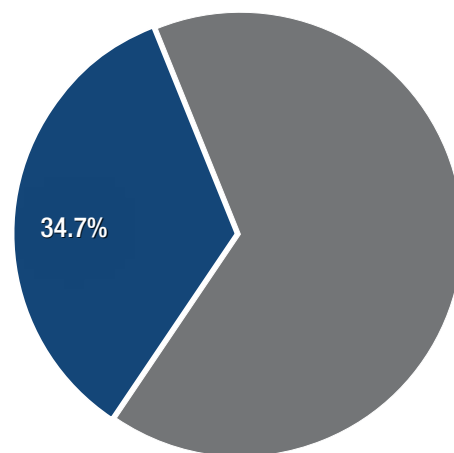
Other Activities

1. Fitness Walking **49.1%**
2. Bowling **31.4%**
3. Billiards **27.4%**
4. Golf **20.7%**
5. Shooting and Target Shooting **17.7%**

Crossover Participation in Boating

Hispanics Ages 6+

34.7% of Hispanic fishing participants also participated in boating in 2011.



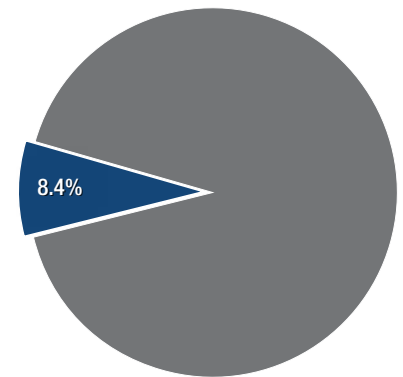
Hispanic Fishing Participants, Ages 6+

POTENTIAL NEW HISPANIC FISHING PARTICIPANTS

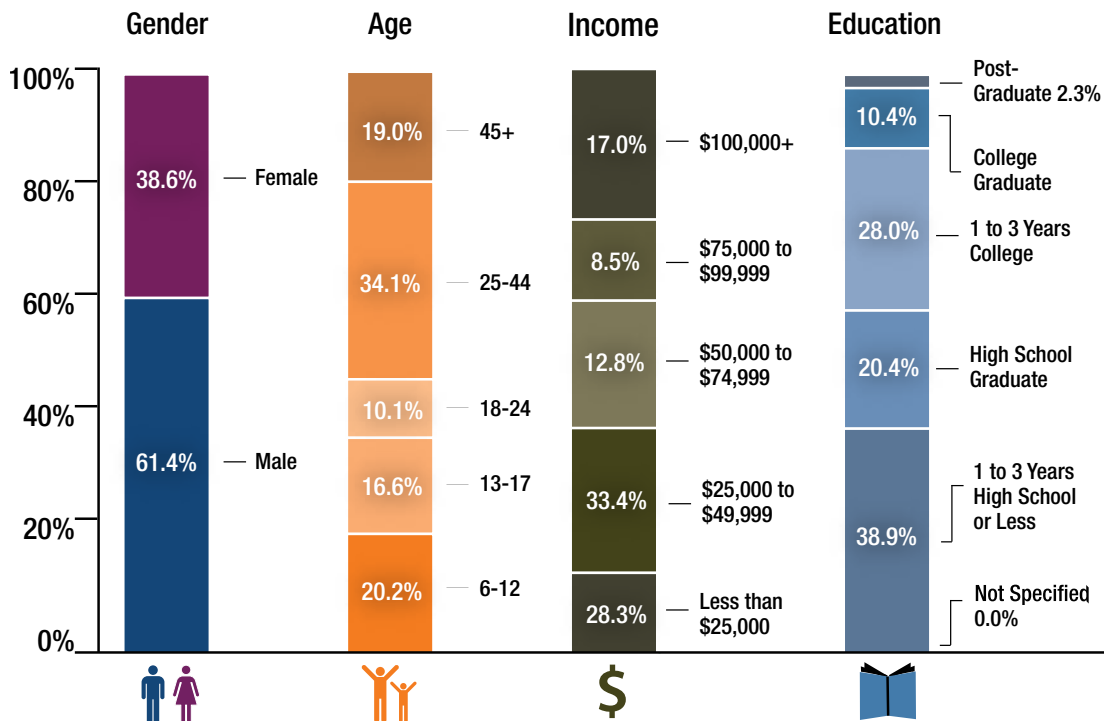
More than eight percent of Hispanic Americans over the age of six are considering participation in fishing. Compared to current Hispanic participants, potential Hispanic participants tend to be younger with almost 37 percent under age 17; less wealthy with 61.7 percent earning less than \$49,999 per year; and less educated with 59.3 percent having a high school diploma or less.

To attract more people to the sport of fishing and plug the “leaky bucket,” it is critical that the Hispanic population is understood and engaged. The largest minority in the United States, Hispanic Americans are underrepresented in outdoor activities, including fishing. The following pages profile Hispanics ages six and older who do not participate in fishing but are interested in becoming active in the activity.

8.4% of Hispanic Americans Ages 6+ are considering participation in fishing.

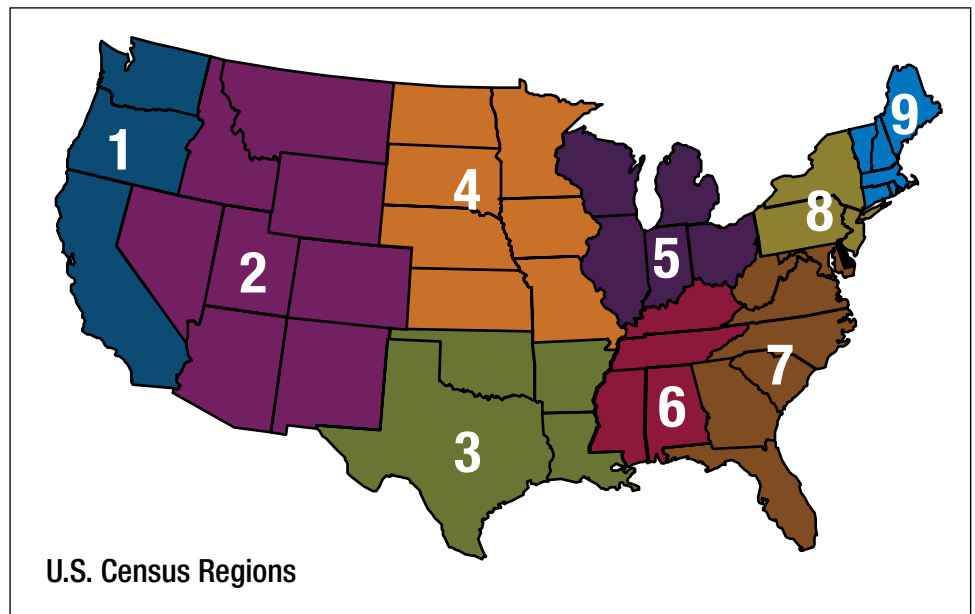


Demographics



Geography of Hispanic Americans Considering Fishing

- 1. Pacific: **26.7%**
- 2. Mountain: **16.2%**
- 3. West South Central: **12.6%**
- 4. West North Central: **0.0%**
- 5. East North Central: **8.4%**
- 6. East South Central: **3.4%**
- 7. South Atlantic: **22.2%**
- 8. Middle Atlantic: **8.3%**
- 9. New England: **2.3%**



Why Are You Interested in Outdoor Activities?

Hispanics Ages 6+ Considering Participation in Fishing

Based on 2010 data

Hispanics Ages 6+

Outdoor activities are a good way to get exercise/stay fit	46.2%
Outdoor activities are cool	46.1%
I want to relax/manage stress	38.3%
I want to try something new	38.1%
I want a change from my usual routine	37.5%
I can do outdoor activities near my home	35.0%
I like challenges	31.8%
Outdoor activities are affordable	30.3%
My parents/brothers/sisters/other relatives participate	27.8%
My friends participate	21.8%
Outdoor activities look fun in magazines/books/websites/TV/movies	20.0%
My kids are the right age now	13.4%
A school/community/other organized program introduced me	3.4%
Other reason	2.1%

BOAT OWNERSHIP

The number of boat owners increased by 2.7 million from 2010 to 2011, signaling that the nation's uncertain economy may finally be stabilizing. In 2011, there were 22.6 million boat owners, or 7.9 percent of the population. Boat purchasing may continue to rise with 10 million Americans saying they are considering a boat purchase.

The majority of boat owners — 79.6 percent — own just one boat. Most are new boats bought from dealerships (80.2 percent), while most previously-owned boats are purchased from friends (41.1 percent). More than 52 percent of boat owners keep their boats at their primary residence.

Ownership Rates

2009	7.3% of Americans ages 6+ own a boat 20.5 million Americans own a boat
2010	7.0% of Americans ages 6+ own a boat 19.9 million Americans own a boat
2011	7.9% of Americans ages 6+ own a boat 22.6 million Americans own a boat

The overall boating ownership rates above are calculated from the Outdoor Foundation's *2011 Outdoor Participation Report*, which uses the total population ages six and older.



22.6 Million

22.6 million Americans own a boat.



Dealership

More than 80 percent of new boats were purchased at a dealership.

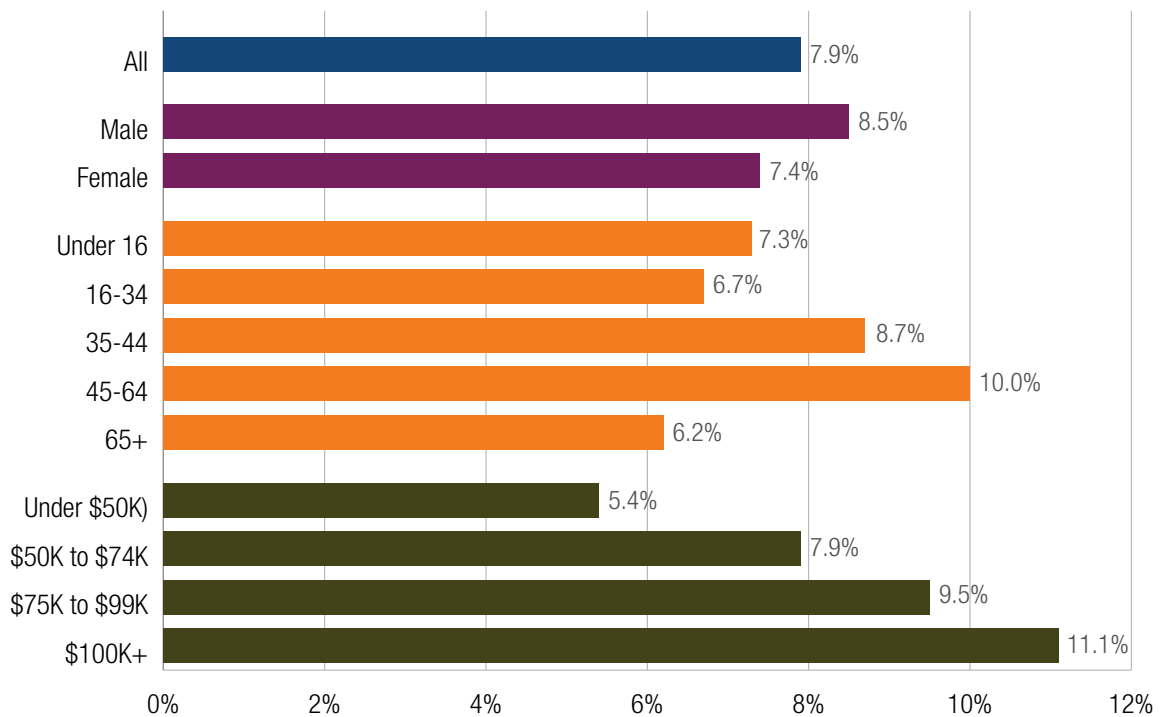


Maintenance/Storage

Almost 38 percent of former boat owners no longer own a boat because of the maintenance and/or storage costs.

Boat Ownership Rate by Demographic

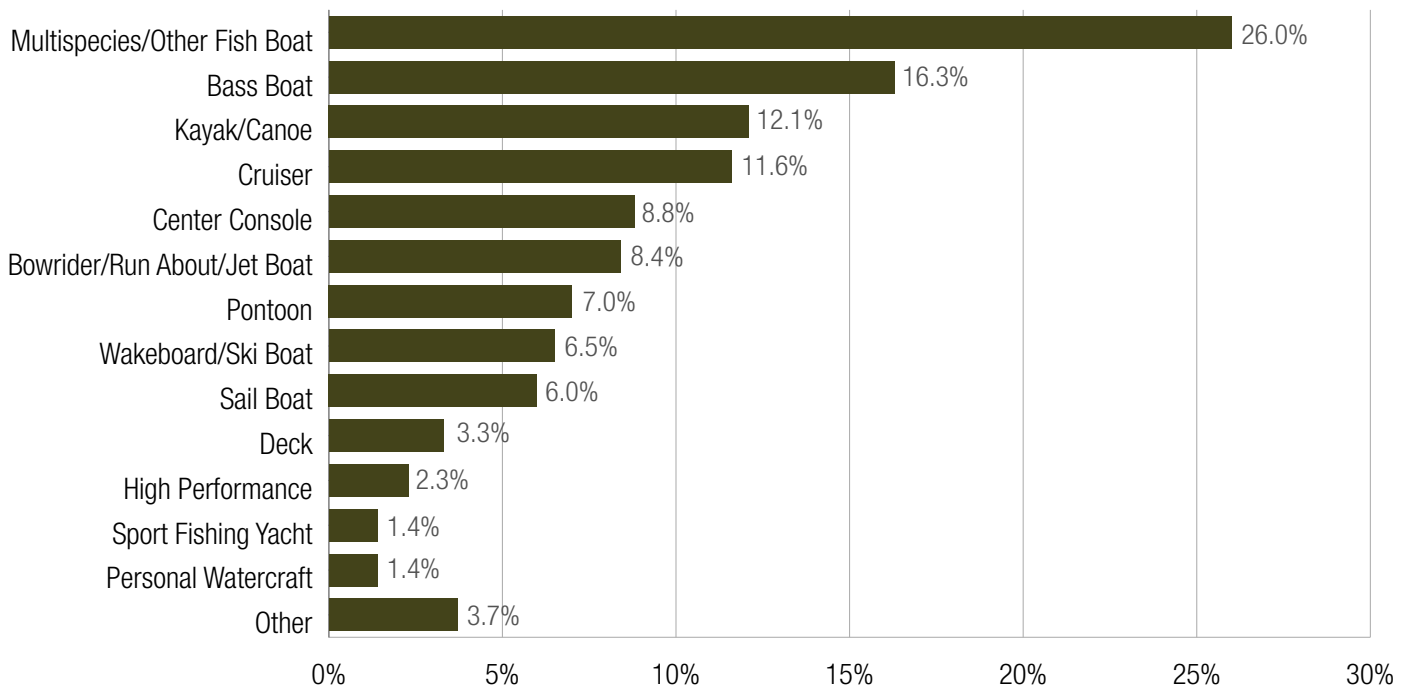
Demographic



Percentage of Boat Ownership, All Americans, 6+

Boat Ownership by Boat Type

Boat Owned

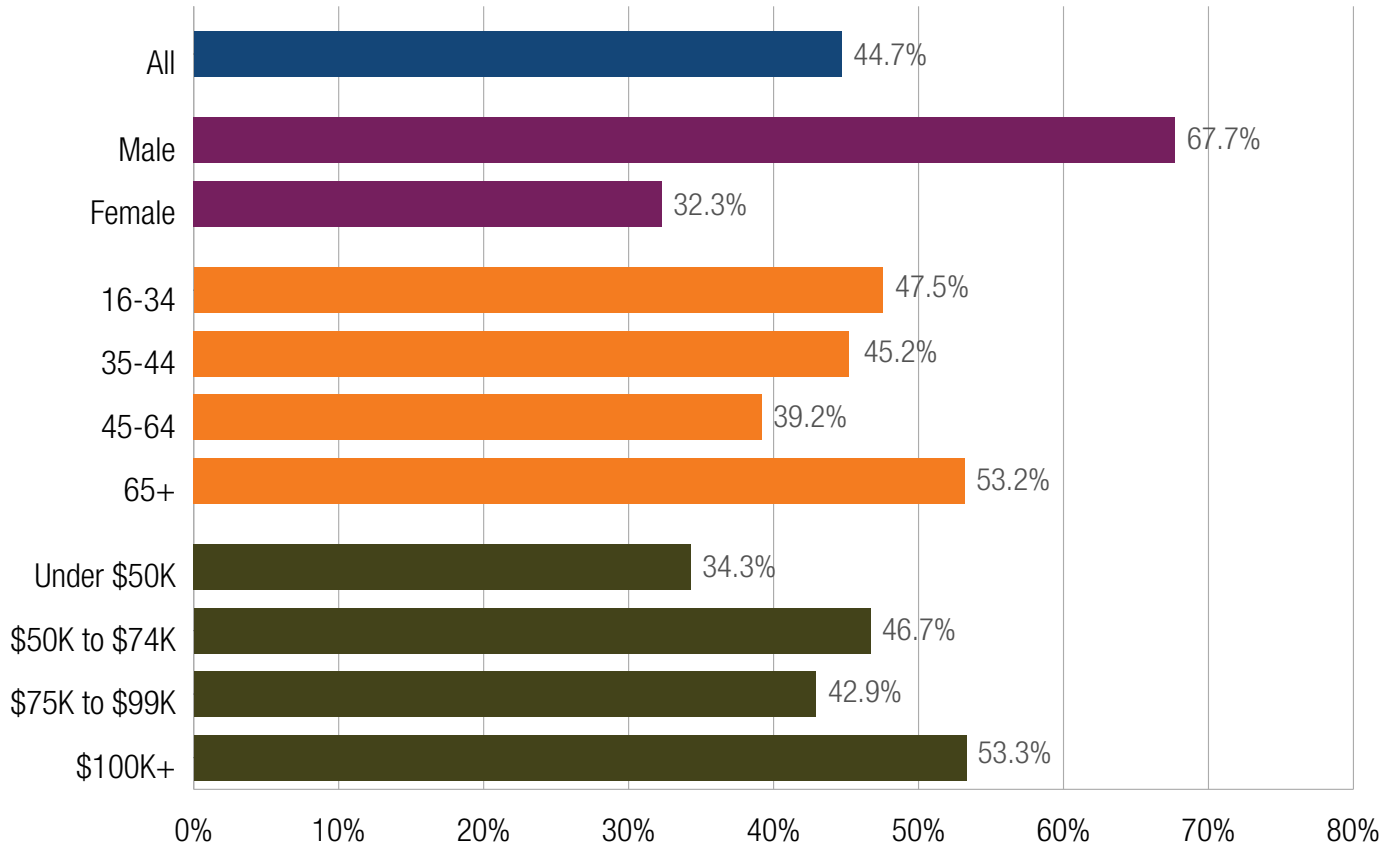


Percentage of Boat Owners, All Americans, 16+

New and Previously-Owned Boat Ownership

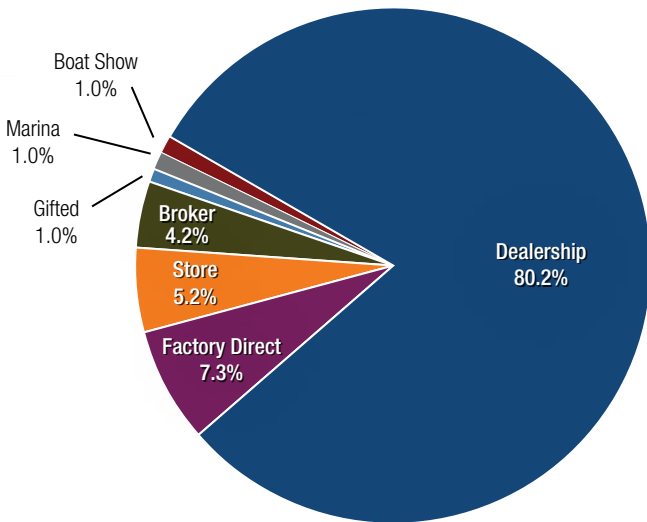
Individuals who Purchased their Boat New

Demographic

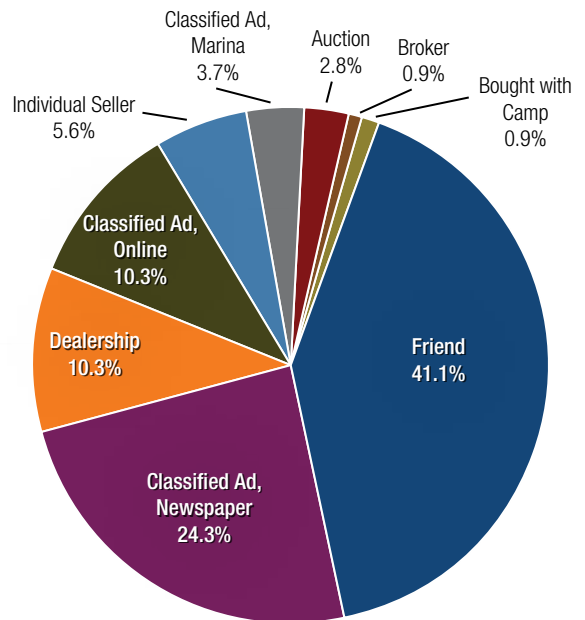


Percent of Boat Owners Whose Primary Boat was Purchased New, Ages 16+

Where did you buy your new boat?

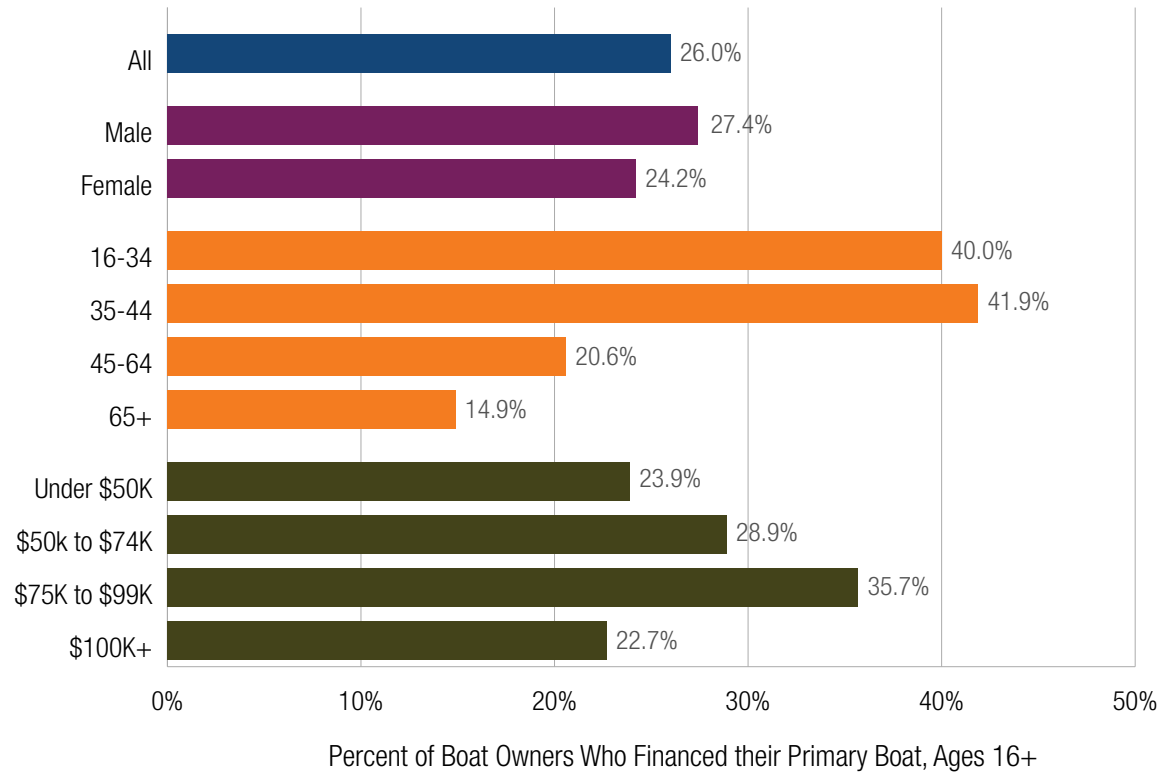


Where did you buy your pre-owned boat?



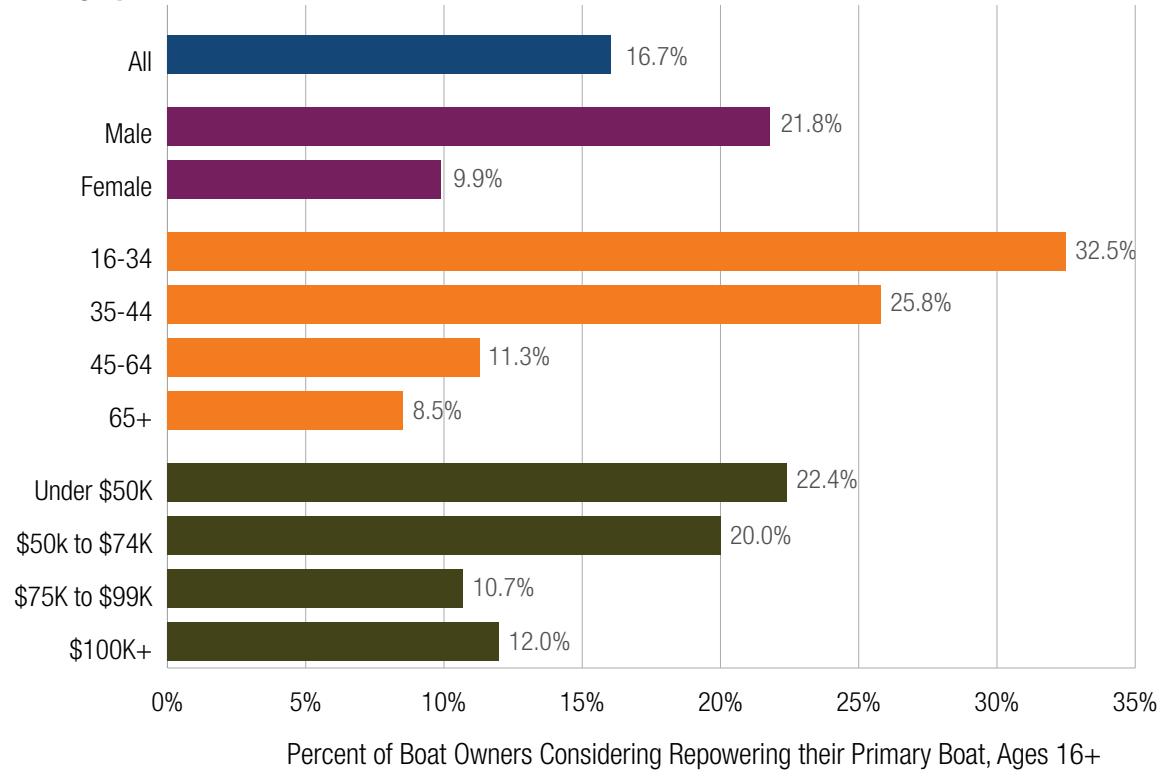
Individuals who Financed their Boat

Demographic



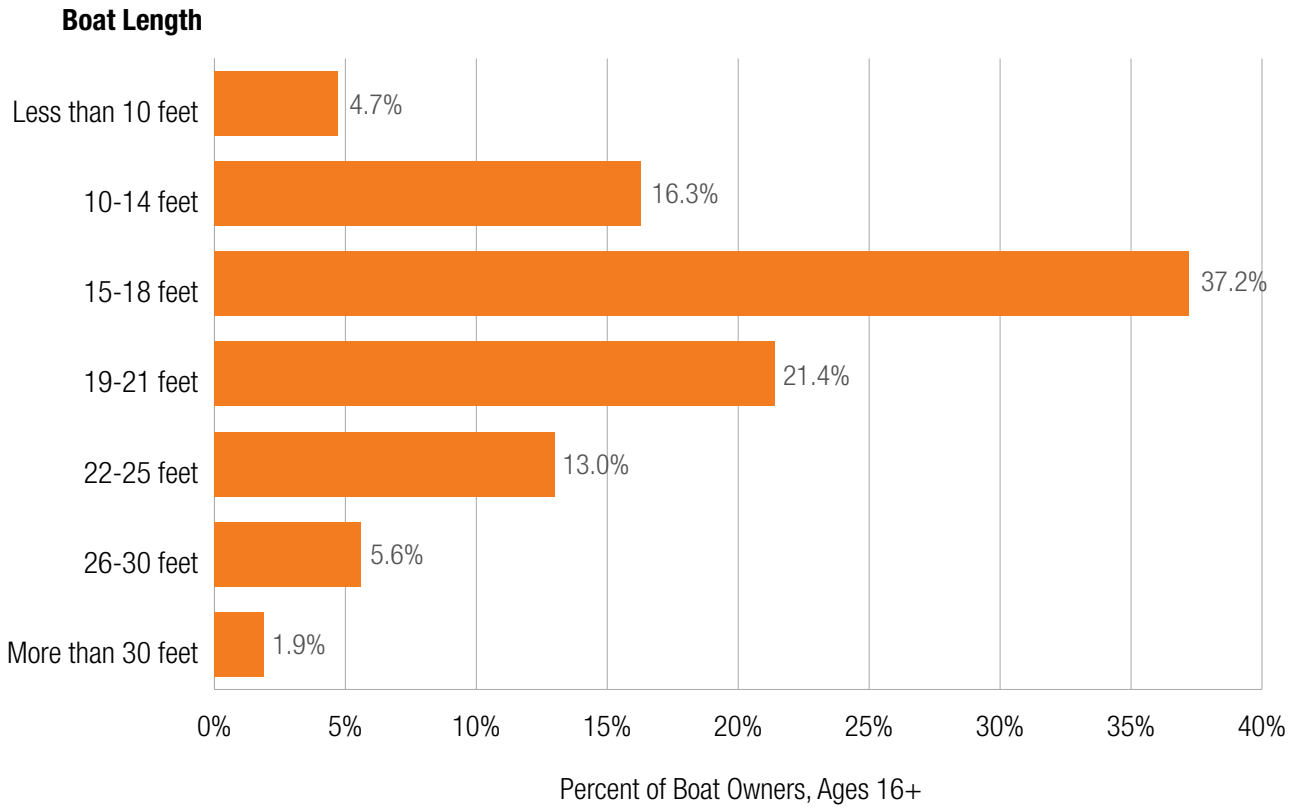
Individuals Considering Repowering their Boat Next Year

Demographic

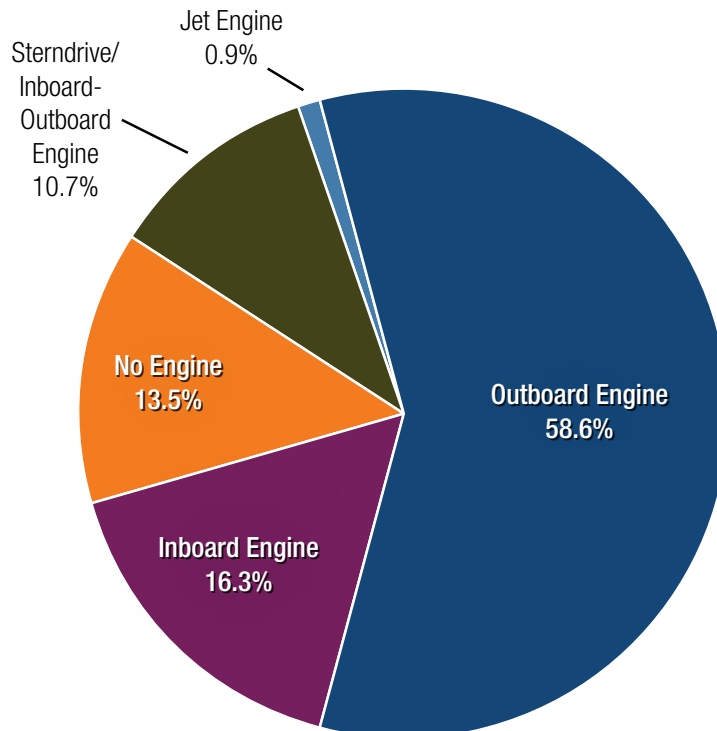


New and Previously-Owned Boat Ownership

What length is your existing boat?



What type of propulsion does your boat have?



Where do you keep your boat during the boating season?

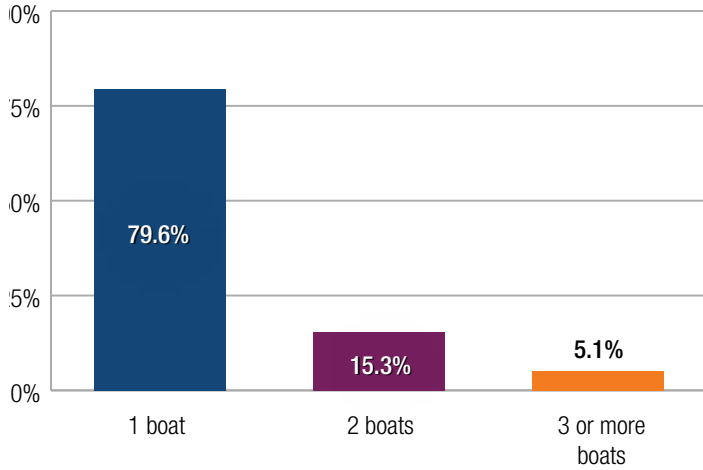
Boat Owners, Ages 16+	
On a trailer at my primary residence	52.1%
On a trailer at a storage facility/marina	11.2%
In the water at a private dock at my primary residence	8.4%
In the water at a private dock at a secondary residence less than one hour from my primary residence	7.9%
On a trailer at my vacation/second residence	7.4%
In the water at a marina less than one hour from my primary residence	6.0%
At my home in a garage/barn/basement	4.7%
In the water at a private dock at a secondary residence one to three hours from my primary residence	3.3%
In the water at a private dock at a secondary residence over three hours from my primary residence	1.4%
In the water at a marina one to three hours from my primary residence	1.4%
In the water at a marina over three hours from my primary residence	0.9%
A different kind of private dock	1.4%
Somewhere else	2.3%

How much money did you spend on boating, including fuel, finance payments, accessories, maintenance, repair and upgrades in 2011?

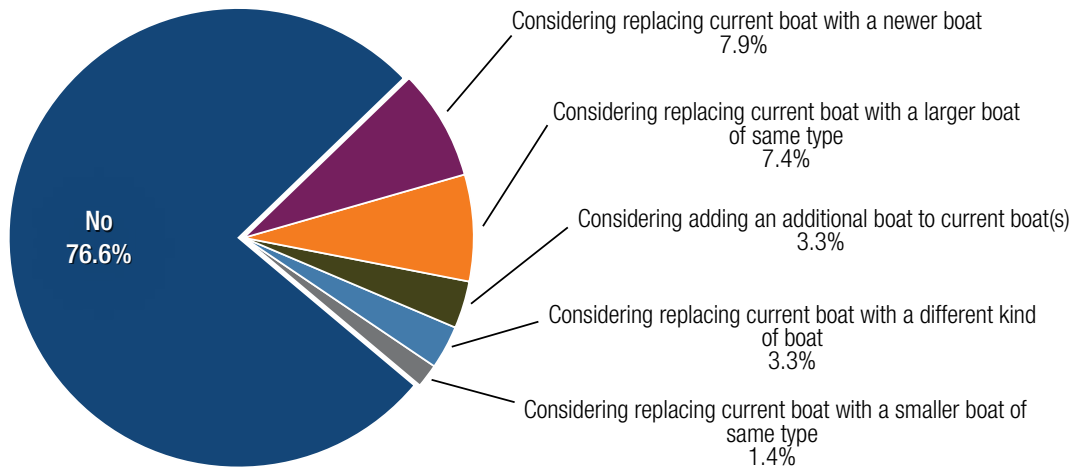
Boat Owners, Ages 16+	
Under \$500	46.5%
\$500 to \$999	17.7%
\$1,000 to \$1,999	12.1%
\$2,000 to \$4,999	14.4%
Over \$5,000	9.3%

Expanding Fleets

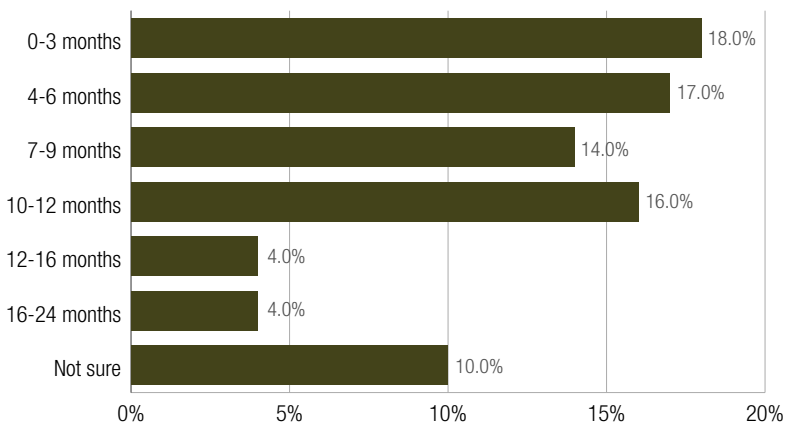
How many boats do you own?



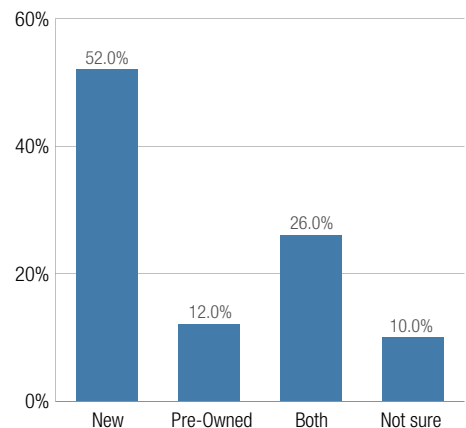
Are you considering purchasing another boat?



How soon are you considering making your purchase?

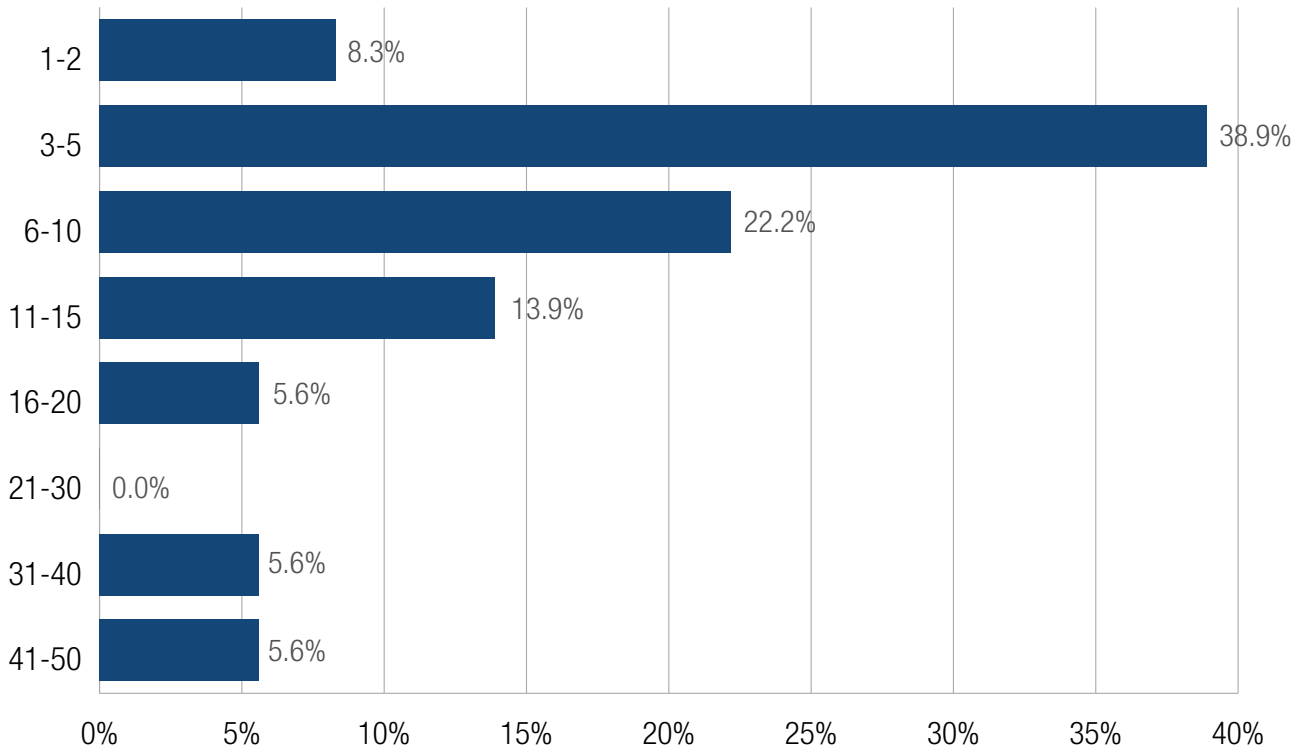


Are you considering a new or pre-owned boat?



How old is the engine you are considering replacing?

Engine Age (Years)



Percent of Boat Owners Considering Buying a New Engine, Ages 16+

What type of engine are you planning to purchase in the next 12 months?

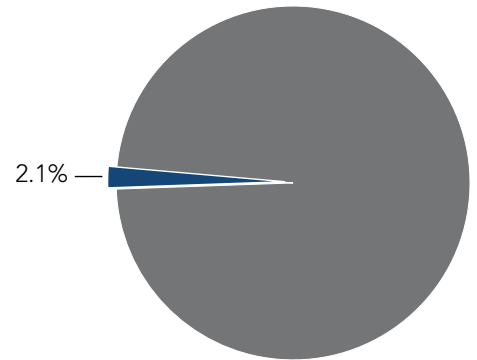
Boat Owners Planning to Buy a New Engine, Ages 16+

Outboard Engine - Gasoline	63.9%
Inboard Engine - Gasoline	11.1%
Outboard Engine - Diesel	8.3%
Outboard Engine - Electric	8.3%
Stern Drive Engine - Gasoline	2.8%
Inboard engine - Diesel	2.8%
Jet Drive Engine	2.8%
Stern Drive Engine - Diesel	0.0%

Considering Boat Ownership for the First Time

Ages 16+

2.1% of Americans are considering boat ownership for the first time.

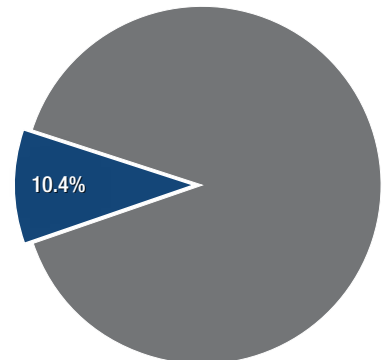


All Americans, Ages 16+,
Who Never Owned a Boat

Previous Boat Owners Considering Boat Ownership

Ages 16+

10.4% of previous boat owners are considering owning a boat again.



All Americans, Ages 16+,
Who Previously Owned a Boat

Why do you no longer own a boat?

Boat Owners, Ages 16+

Cost of maintenance/storage	37.8%
Cost of fuel	27.8%
Time constraints	17.8%
No longer live near water	15.6%
Not employed/reduced income	8.9%
Lost boating partner (friend)	8.9%
Lost interest in boating	7.8%
Lost boating partner (spouse, significant other)	6.7%
No longer participate in boating-related activities	6.7%
Health reasons	5.6%

Note: top 10 reasons for no longer owning a boat included.



BOATING PARTICIPATION

Americans ages six and up participate in boating at a rate of 17.8 percent, down slightly from 18.1 percent in 2010. The good news is that the average number of outings per boater increased from 13.2 annual outings to 14 annual outings. Overall, the total number of boating outings increased from 675.9 million outings to 710.1 million outings.

Boating participants went out on the water most in pontoon boats at a rate of 22.4 percent. This is followed closely by kayaks, canoes or row boats at 20.4 percent and cruisers at 19.6 percent.

Boating participants spend an average of 14.2 days on the water. Those between ages 45 and 64 average the highest at 18.3 days.

Most boating participants enjoy outings with friends at 63.1 percent, and most outings are taken in freshwater at 63.7 percent. More than 18 percent of boating participants rent or charter a boat while on vacation.



18.3 Days

Boating participants ages 45 to 64 spend an average of 18.3 annual days boating, the most boating days of any demographic.



Friends

More than 63 percent of boating participants go out on the water with friends.



Freshwater

Almost 64 percent of participants go boating in freshwater.

Boating Participation

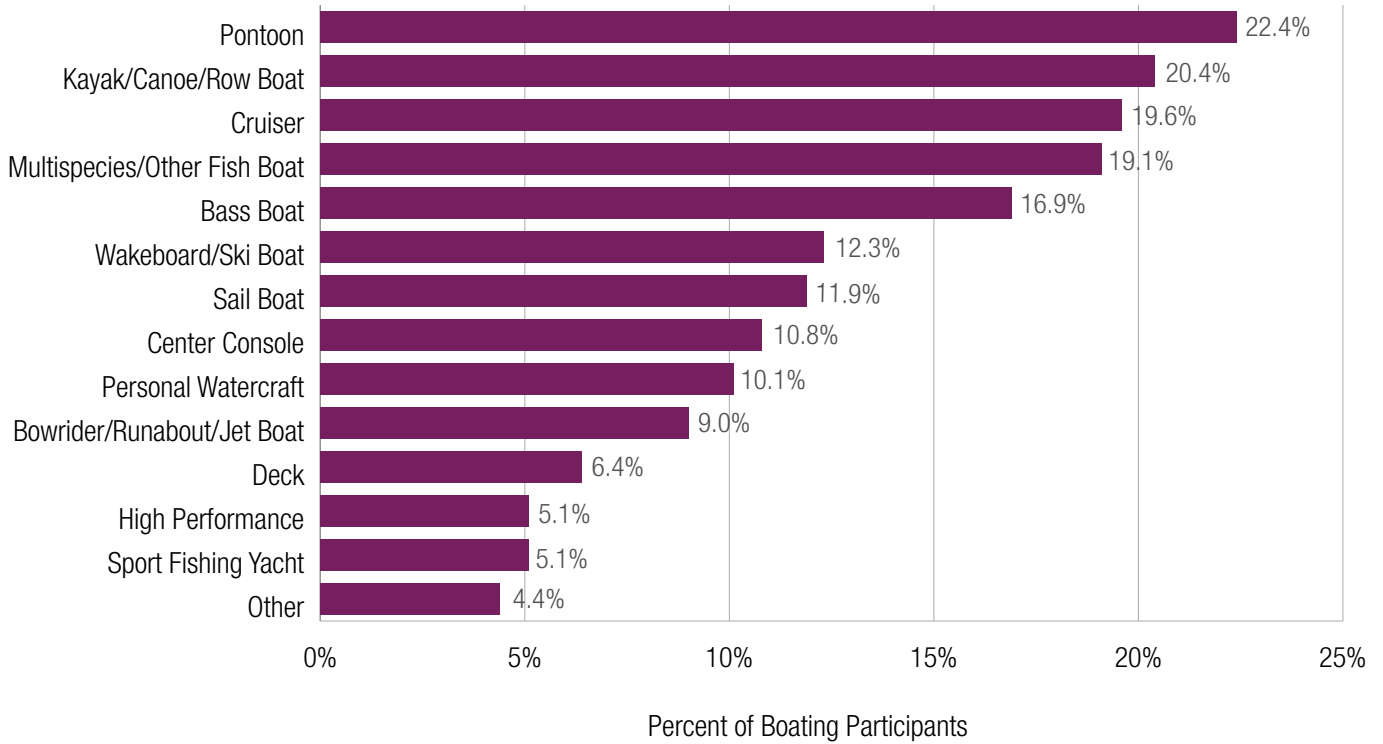
17.8% Percentage of Americans ages 6 and older who went boating in 2011 (50.9 million participants)

710.1M Projected number of boating outings made by Americans ages 6 and older in 2011

The overall boat ownership rates above are calculated from the Outdoor Foundation's 2011 *Outdoor Participation Report*, which uses the total population ages six and older.

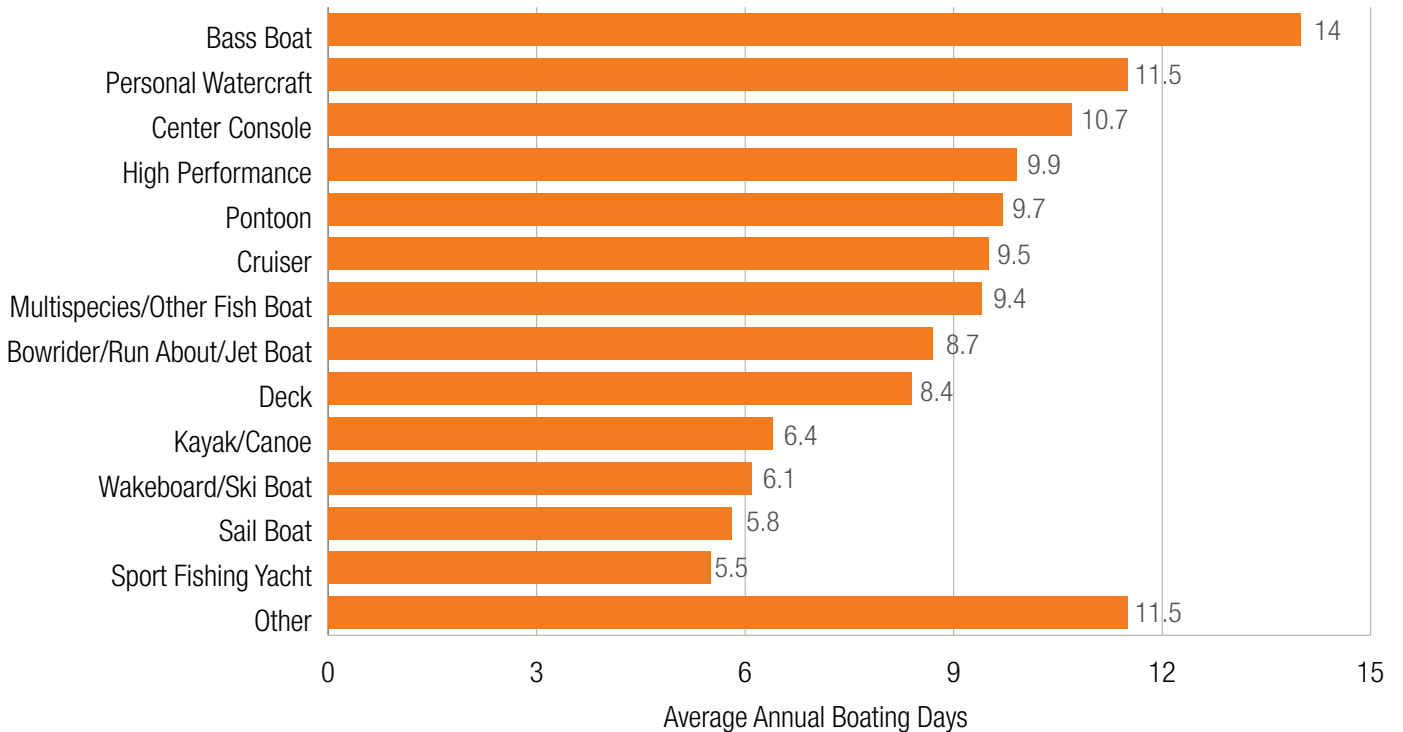
On Which Types of Boats Did You Go Out on the Water?

Ages 16+ in Last 12 Months



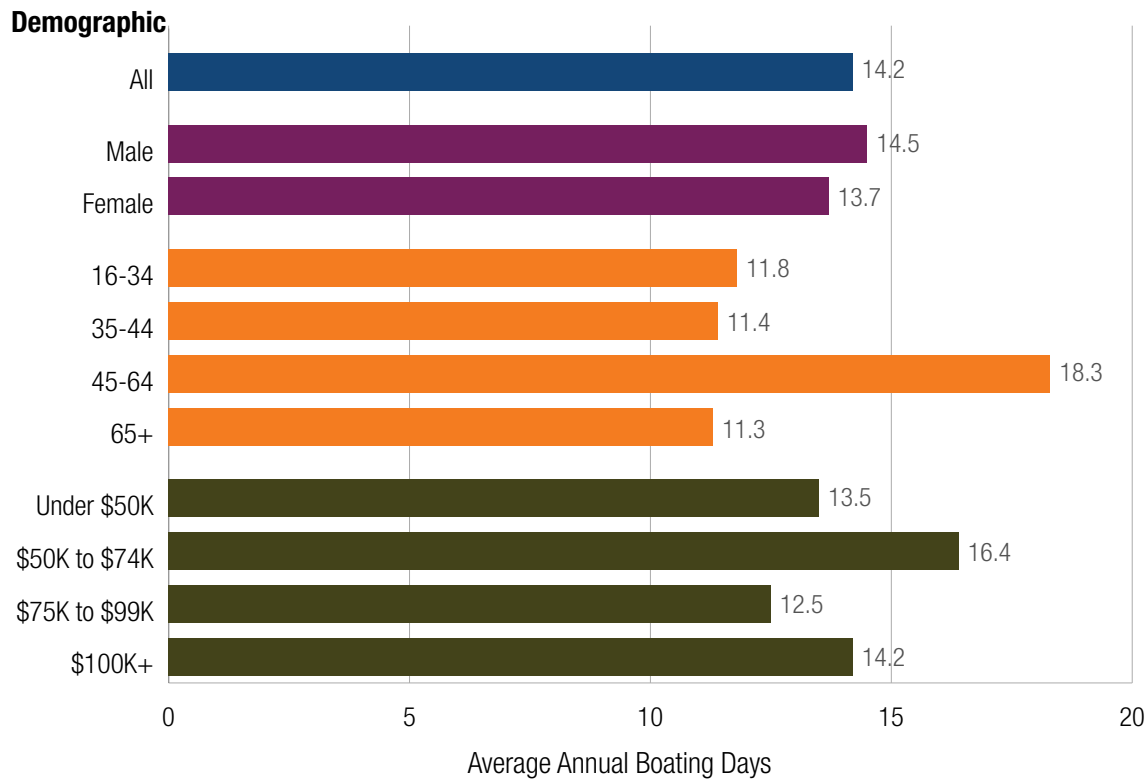
Average Annual Boating Days by Boat Type

Among Boating Participants, Ages 16+



Average Number of Annual Boating Days by Demographic

Among Boating Participants, Ages 16+



Note: The average number of boating days per participant is calculated by summing up the reported days spent boating for all boat types. While this average is representative of the extent of their boating participation, it may not equate to the number of days they spent on the water since participants may use two different boat types on the same day (e.g. a powerboat and a personal watercraft).

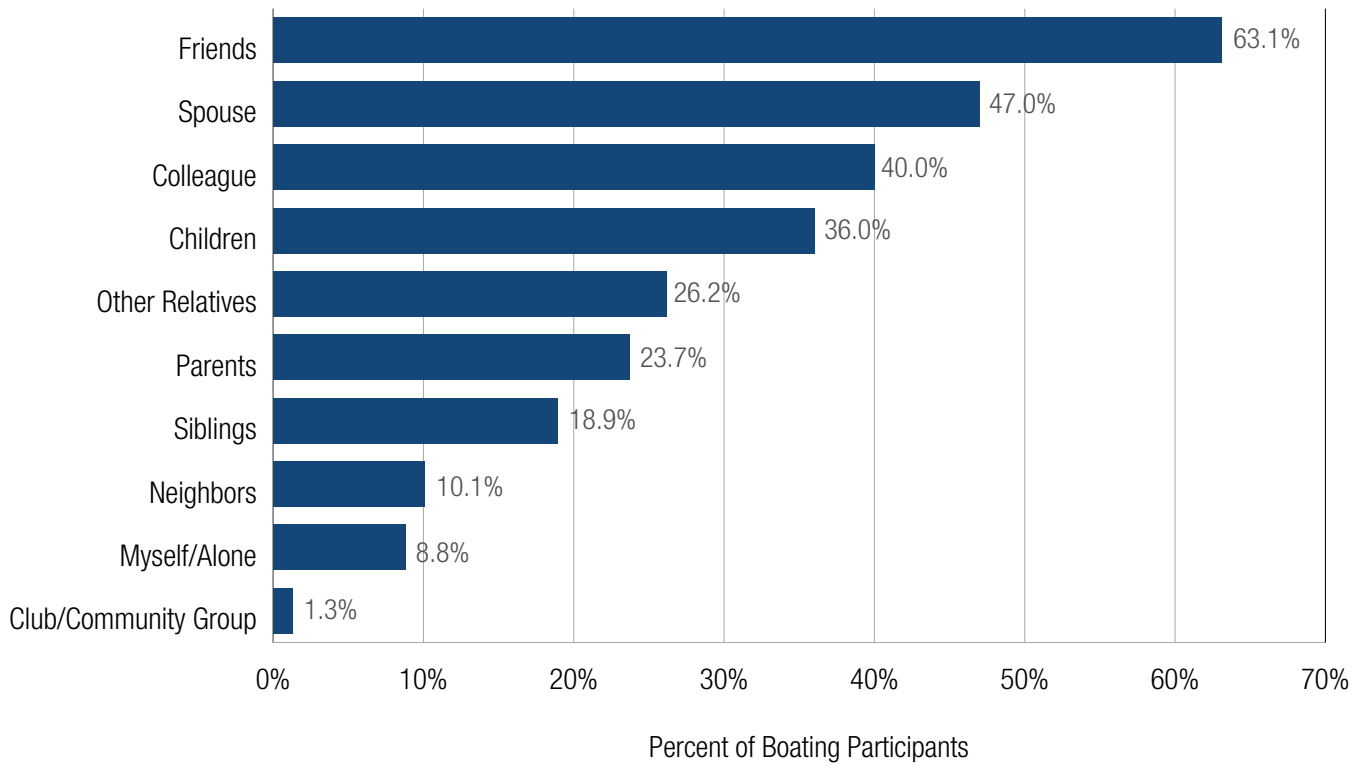
Percentage of Boating Participants Who Personally Commanded or Operated a Boat by Type

Ages 16+

	All	Males	Females
Kayak/Canoe/Row Boat	92.5%	95.8%	88.9%
Personal Watercraft	84.8%	96.4%	66.7%
Bass Boat	61.0%	72.4%	26.3%
Other	50.0%	61.5%	28.6%
Pontoon	47.1%	56.1%	30.6%
Center Console	46.9%	47.2%	46.2%
Wakeboard/Ski Boat	46.4%	62.5%	25.0%
Bowrider/Run About/Jet Boat	46.3%	66.7%	17.6%
Deck	44.8%	50.0%	33.3%
Cruiser	43.8%	71.1%	15.9%
Sport Fishing Yacht	43.5%	50.0%	0.0%
High Performance	39.1%	53.3%	12.5%
Sail Boat	35.2%	44.8%	24.0%

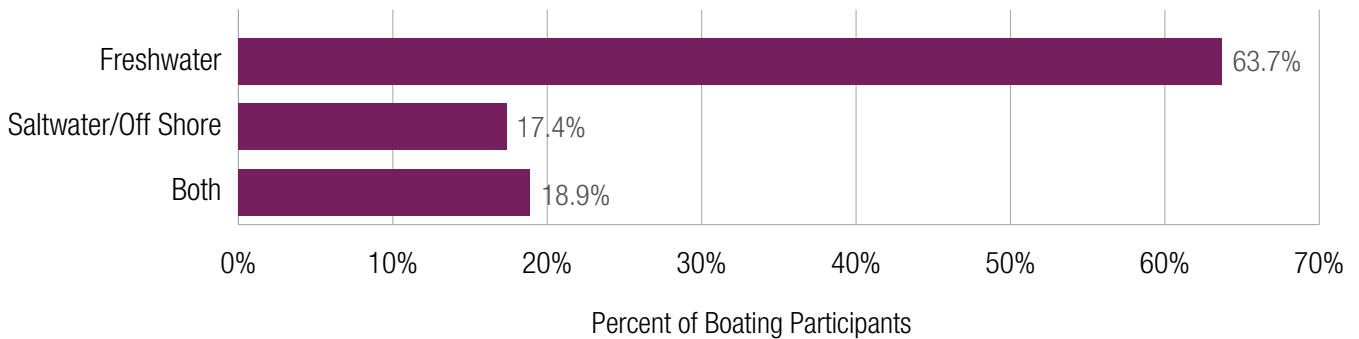
Boating Companions

Among Boating Participants, Ages 16+



Boating Water Types

Among Boating Participants, Ages 16+



BOATING ACTIVITIES

Americans enjoy a variety of activities while boating — from hunting to paddling. Males prefer to fish with 64 percent fishing while boating. Women prefer cruising with 58.9 percent participating.

Men enjoy the most number of days per year enjoying activities on the boat with an average of 5.3 days per year spent kneeboarding, followed closely by 5.2 days per year spent fishing. Women spend an average of 4.8 days per year scuba diving/snorkeling, followed by 4.7 days per year sunbathing.



Fishing

Fishing from a boat is the most popular boating activity among males over the age of 16 with 64 percent participation.



Scuba/Snorkeling

Female boating participants spend an average of 4.8 days per year scuba diving or snorkeling, the most annual days per female participant.



Adults

Adult boating participants ages 45 to 64 spend the most annual days doing boating activities at 40.2 average days per participant.

Participation in Boating Activities by Gender

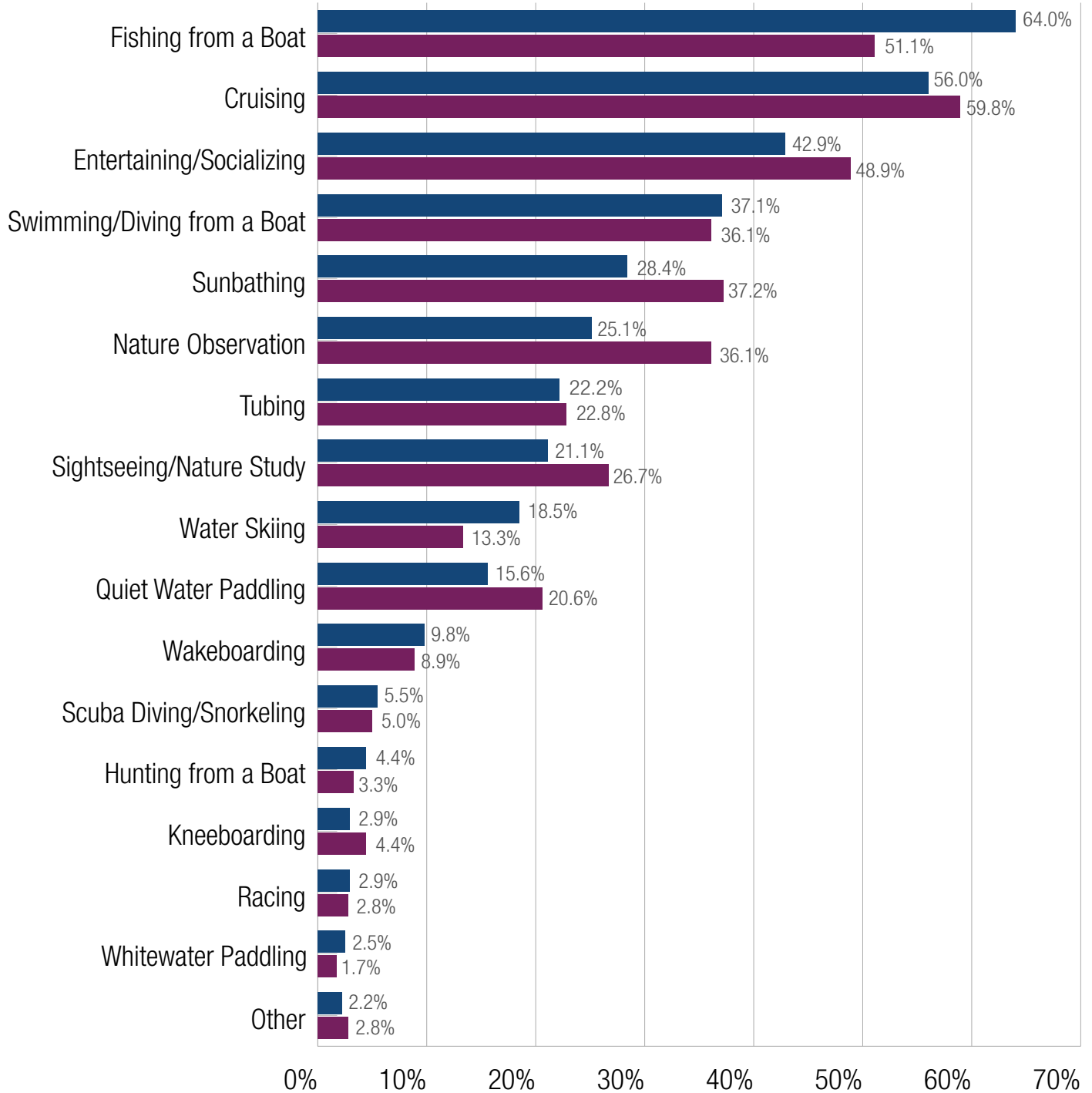
Among Boating Participants, Ages 16+



Male



Female



Participation Rate Among Boaters

Boating Activity Days by Gender

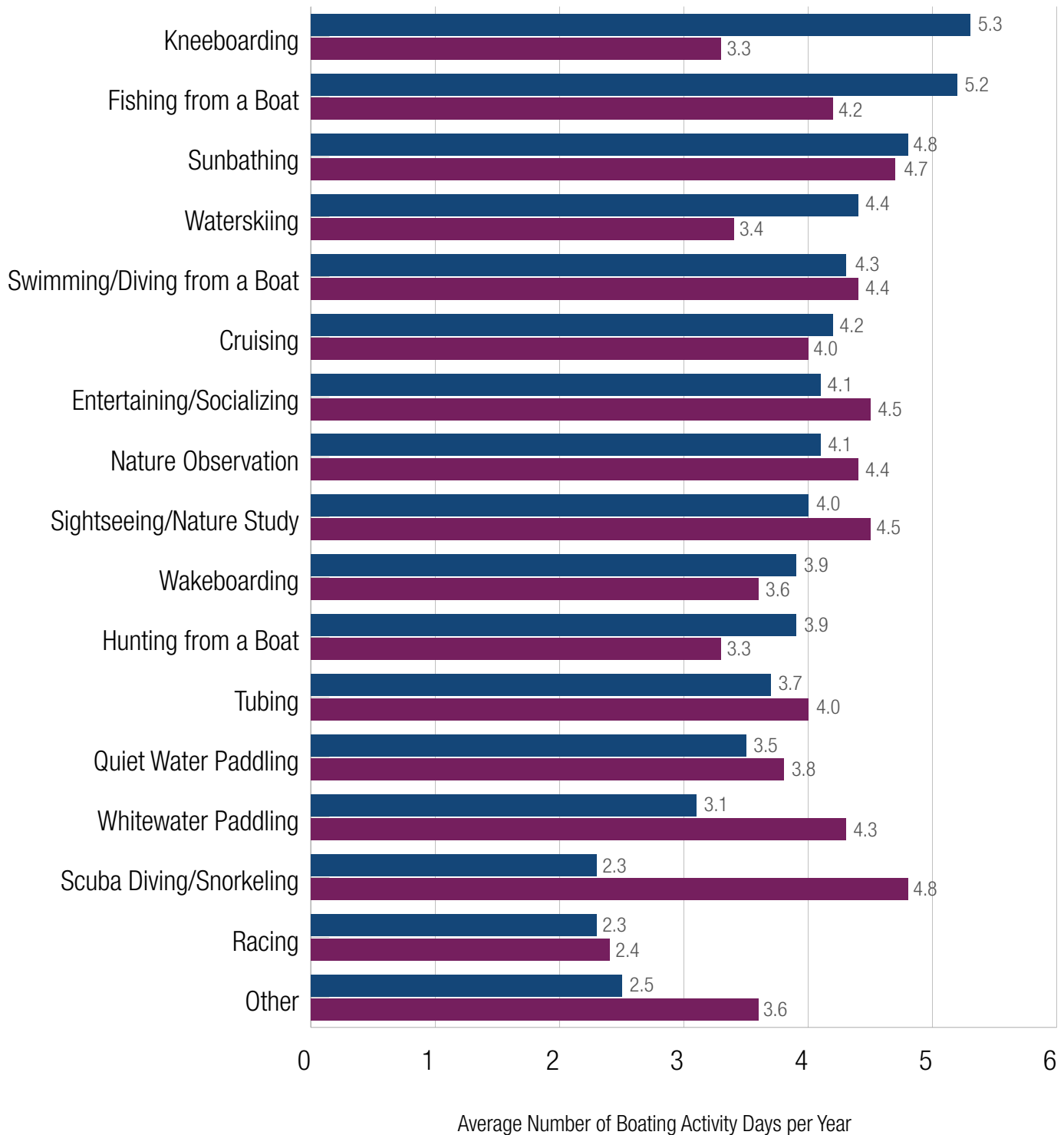
Among Boating Participants, Ages 16+



Male

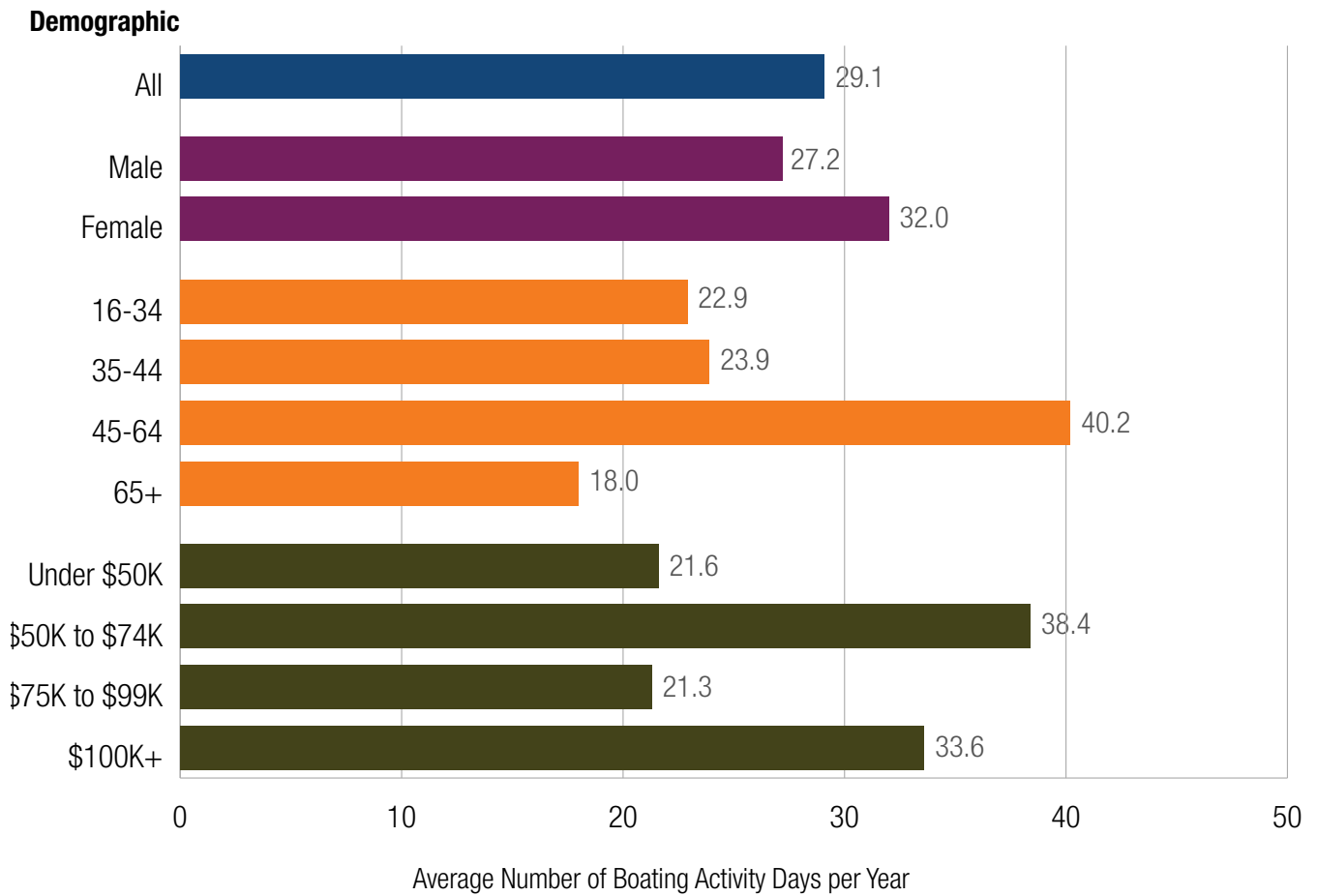


Female



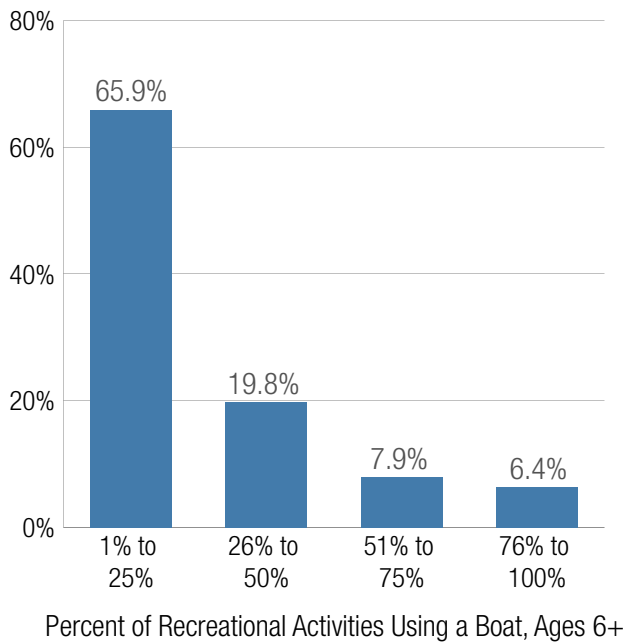
Participation in Boating Activities by Demographic

Among Boating Participants, Ages 16+



Percentage of Recreational Activities Involving a Boat

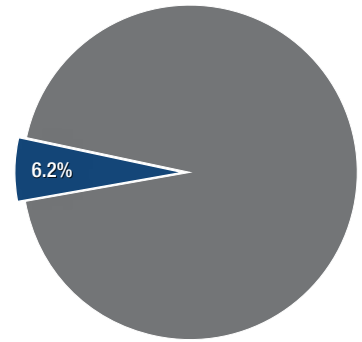
Among Boating Participants, Ages 6+



Boating Club Memberships

Among Boating Participants, Ages 6+

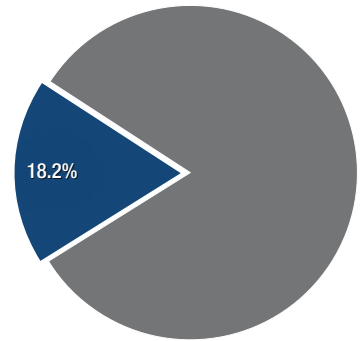
6.2% of boating participants belonged to a boating club that provides boats for a fee.



Vacation Charters/Rentals

Among Boating Participants, Ages 16+

18.2% of boating participants rented or chartered a boat while on vacation in 2011.



Fishing and Boating Outings

Ages 6+

	2011
Number of Boating Outings	594,184,478
Number of Fishing Outings	720,806,850
Number of Fishing Outings from a Boat	224,601,733
Percentage of Boating Outings with Fishing	37.8%
Percentage of Fishing Outings that were on a Boat	31.2%
Percentage of Fishing Participants who Fished from a Boat at least Once in 2011	53.4%



Method

Each year the Physical Activity Council (PAC) carries out the largest sports participation study in the USA. During January and February 2012, a total of 38,172 online interviews were carried out with a nationwide sample of individuals and households from the US Online Panel operated by Synovate. A total of 15,113 individual and 23,059 household surveys were completed. The total panel has more than one million members and is maintained to be representative of the U.S. population age six and older.

In March of 2012, a total of 508 respondents from the PAC Study ages 16 and older were selected for follow-up interviews on boating participation. Results from these interviews provide nationally representative data on boating participation among all Americans and can be projected to produce national numbers.

Youth Interviews

All interviews of children under 13 were carried out following the guidelines set out in the Children's Online Privacy Protection Act of 1998 (COPPA). No children were contacted directly. The panel is a balanced sample of households with children in each age group, but contact is always made through designated adult panelists. The adult panelist receives the survey invitation on behalf of a specified child, age six to 12, and they are asked to complete the survey together. Respondents ages 13 to 17 are contacted in a manner similar to respondents ages six to 12, but they are asked to complete the survey themselves.

Notes

Unless otherwise noted, the data in this report was collected during the latest 2012 participation survey, which focused on American participation in the 2011 calendar year.

A Partnership Project of:

