

A SPECIAL REPORT ON PADDLESPO RTS

2009

KAYAKING
CANOEING
RAFTING



A Partnership
Project of:



**OUTDOOR
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PADDLESPO RTS

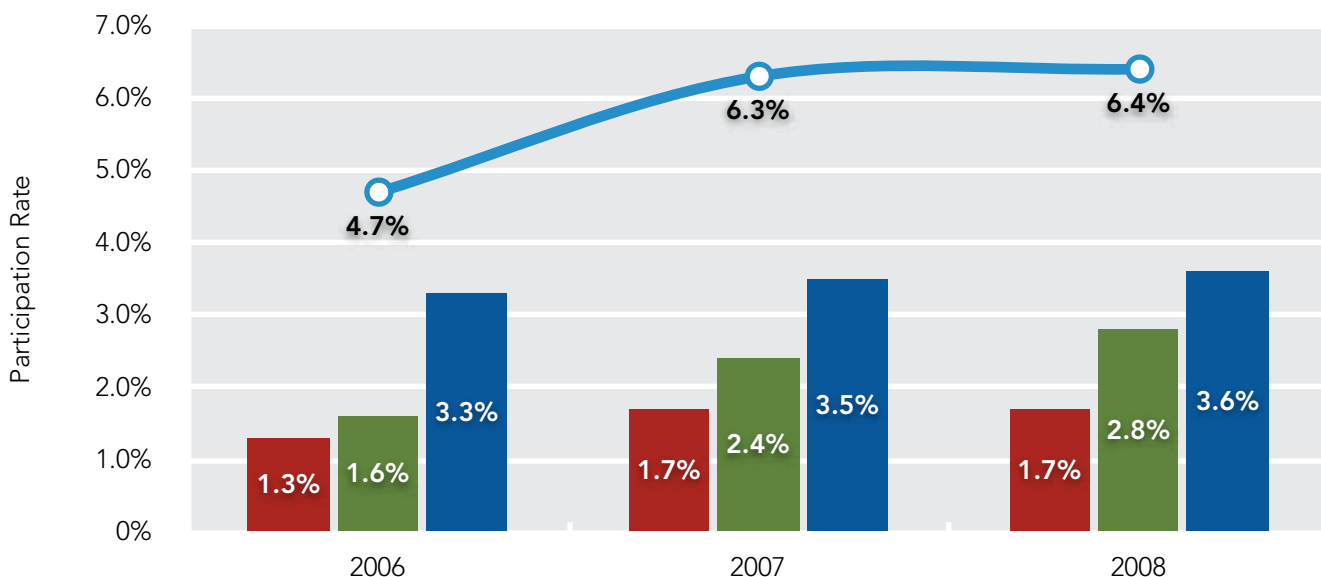
Paddlesports offer some of the most diverse outdoor experiences of any nature-based activity — giving participants the freedom to explore the rivers, lakes, streams and other waterways in their local communities and across the

country. More than 6 percent of Americans participated in paddling in 2008 — totaling over 17.8 million individuals. On average, each paddler takes 10 trips a year, contributing to 174 million annual paddling outings.

While paddling participation has increased overall in recent years, the sport does have a major outreach opportunity with minority groups and females — both significantly underrepresented in every paddlesport category.

Participation in Paddlesports

All Participants Ages 6+



2008 Participants

Paddling (Any Type)	17.8 Million	Kayaking (Any Type)	7.8 Million
Canoeing	9.9 Million	Rafting	4.7 Million

Annual Outings

In 2008, paddling participants made 174 million annual outings — in kayaks, rafts and canoes on waterways nationwide. Paddlers made an average of 10 outings each, with kayakers being the most avid enthusiasts and rafters the least. A full 43 percent of rafters made only 1 annual outing in 2008 — a testament to the unique character of the sport.

an average **10**
outings per participant

174 million annual outings

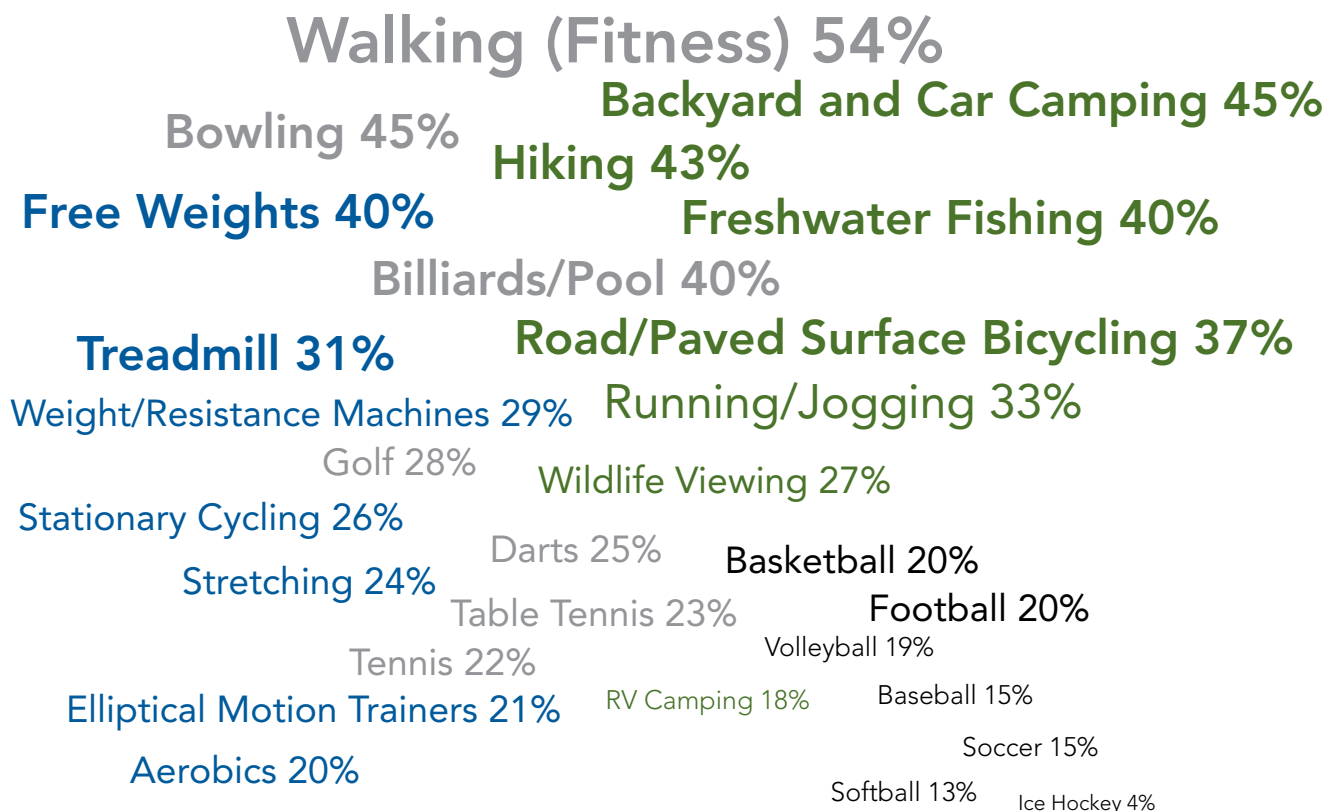


Crossover Participation

Outside of their paddling pursuits, kayakers, rafters and canoers share a passion for many of the same activities. As a result, there is great value in looking at their “crossover” participation as a group.

Paddlers clearly prefer to participate in other outdoor activities rather than spend time with team sports or indoor fitness activities. Interestingly, fitness walking, backyard and car camping, hiking, free weights and freshwater

fishing are particularly popular. Team sports ranked especially low among paddling enthusiasts — providing a valuable insight into the independent streak of many paddlers.



KAYAKING

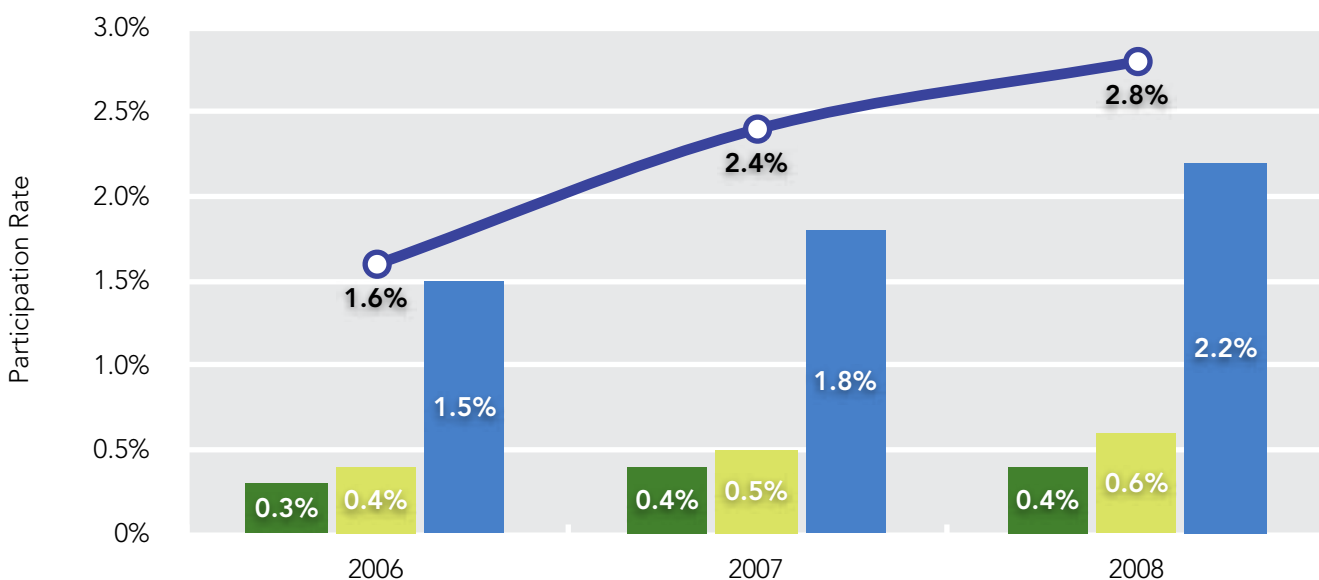
Kayaking has enjoyed steady growth over the past three years. Whitewater kayaking, sea/touring kayaking and recreational kayaking all grew in 2007 and 2008 to a combined participation of 2.8 percent of Americans.

The most popular style of kayaking is recreational kayaking, followed (by a significant margin) by sea/touring kayaking and whitewater kayaking. Most kayakers live in states bordering the Atlantic and Pacific Ocean — the New England,

Middle Atlantic, South Atlantic and Pacific regions of the United States. Overall, 7.8 million Americans participated in kayaking in 2008.

Participation in Kayaking

All Participants Ages 6+



2008 Participants

	Kayaking (Any Type)	7.8 Million		Sea/Tour Kayaking	1.8 Million
	Recreational Kayaking	6.2 Million		Whitewater Kayaking	1.2 Million

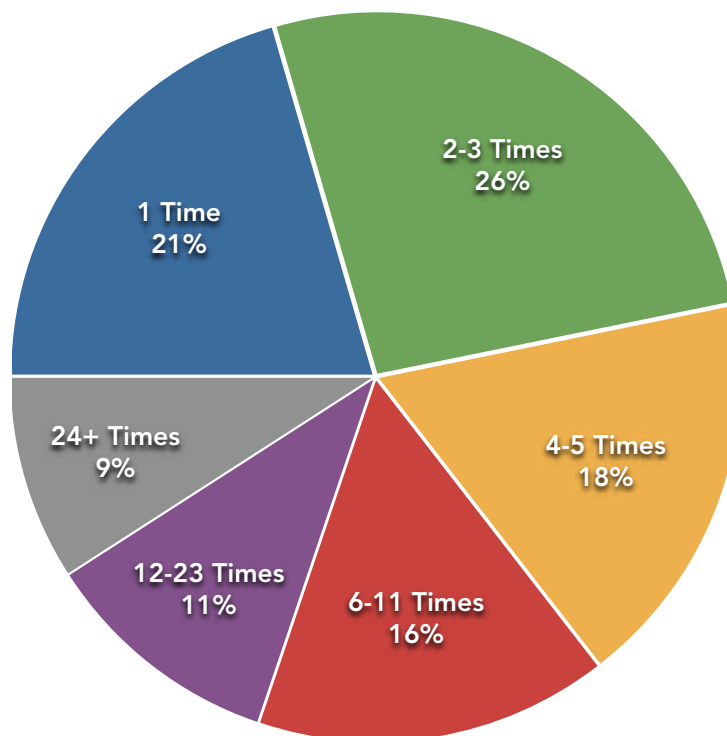


Annual Outings

In 2008, kayakers made 77.4 million annual outings. For some participants, this meant getting out once a season and for others, once a month or more.

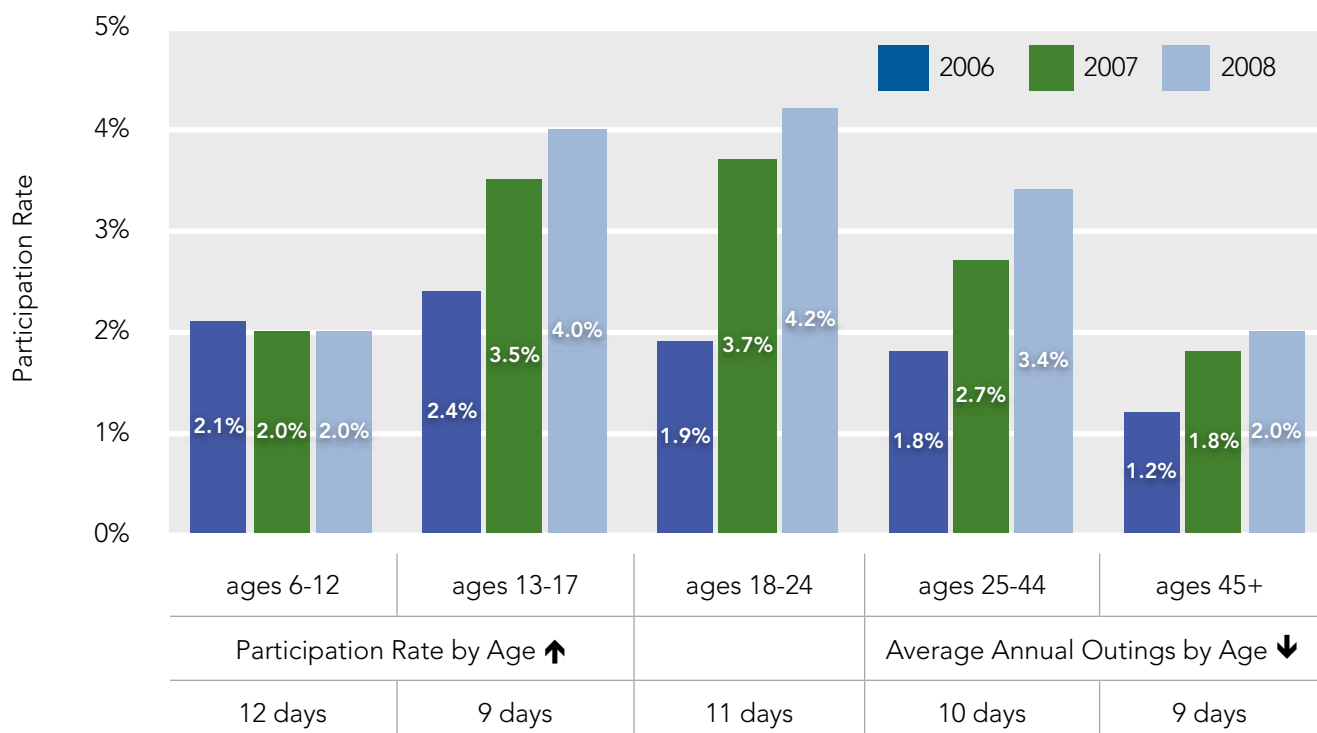
10 days

Kayakers made an average of 10 outings each in 2008.



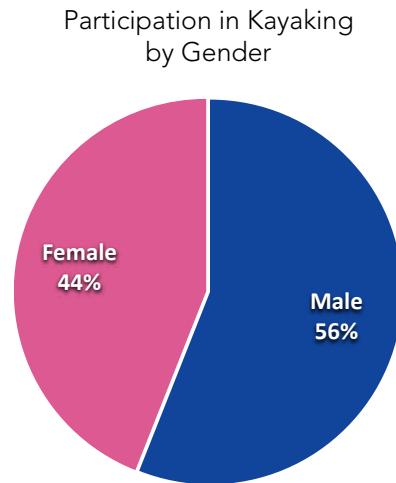
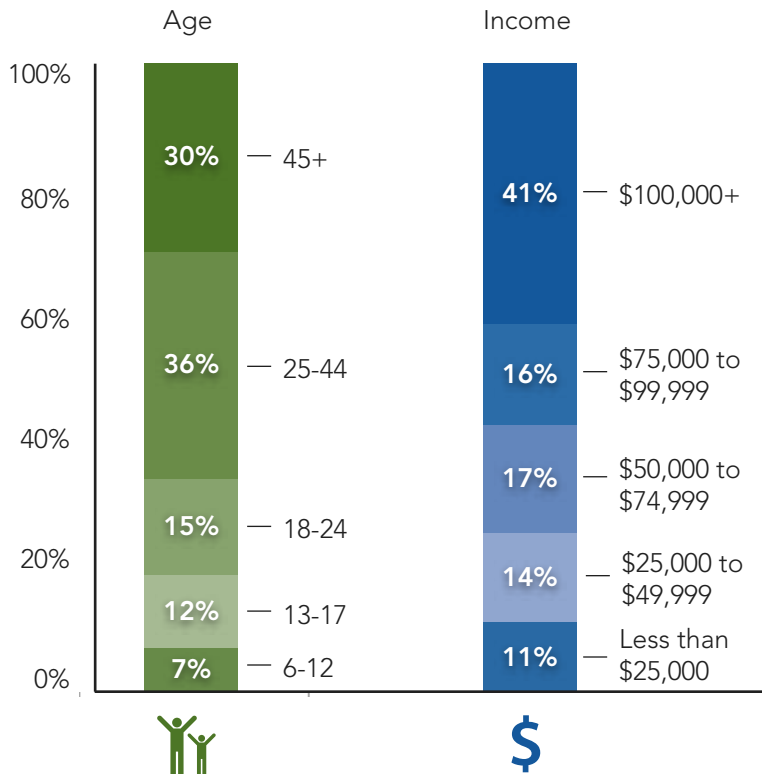
Participation in Kayaking by Age

Whitewater, Sea/Touring and Recreational Kayaking

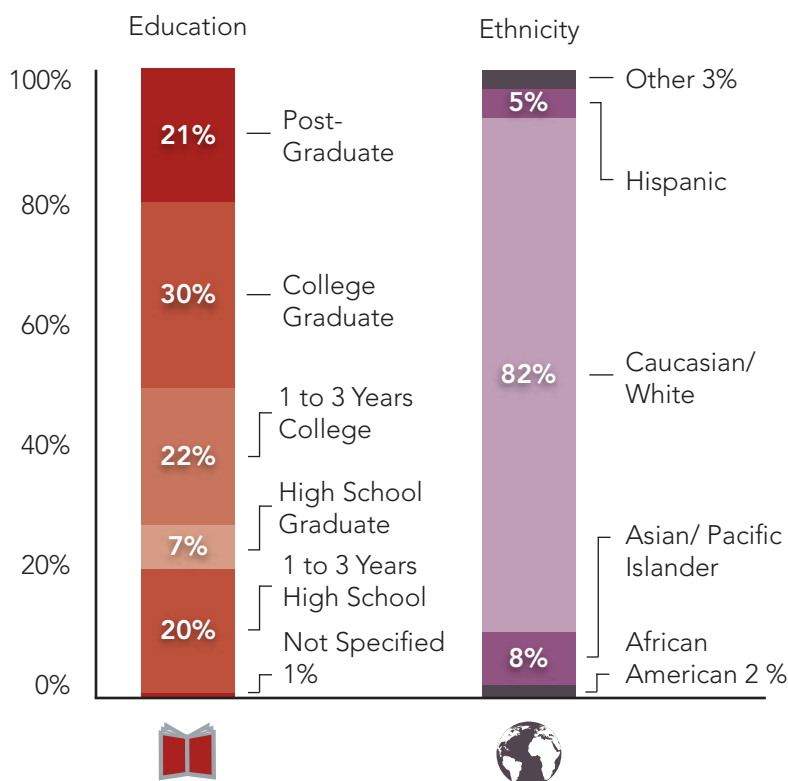
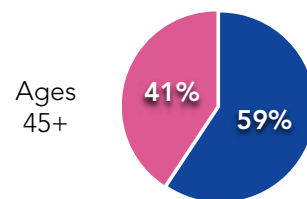
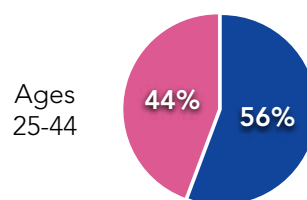
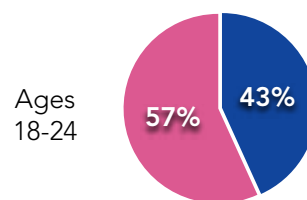
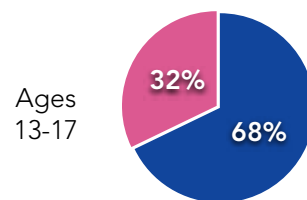
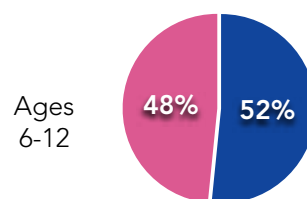


Demographics

Division of Kayaking Participants by Demographic

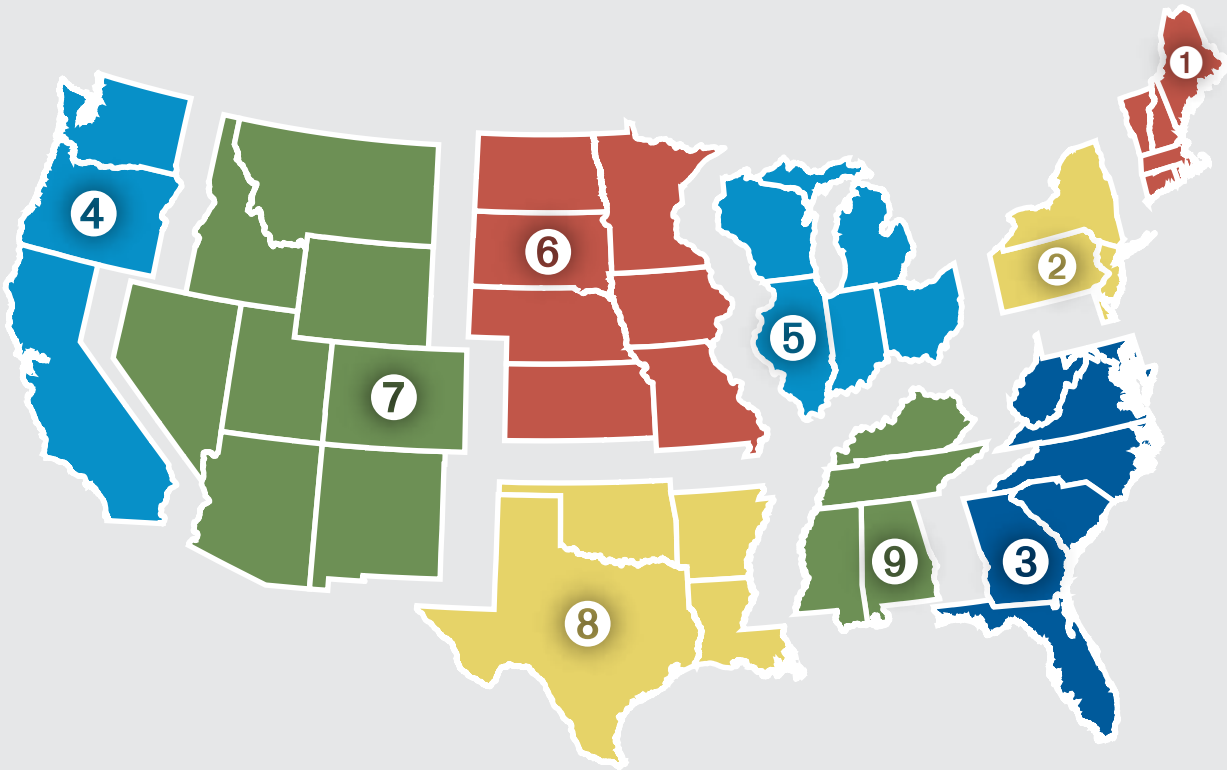


Ages 6 and Older



Participation in Kayaking by Census Region

All Americans, Ages 6 and Older



4 Pacific

Participation Rate: 2.9%

Percent of US Participants: 16.5%

6 West North Central

Participation Rate: 2.2%

Percent of US Participants: 5.2%

1 New England

Participation Rate: 7.6%

Percent of US Participants: 13.0%

7 Mountain

Participation Rate: 2.0%

Percent of US Participants: 5.0%

8 West South Central

Participation Rate: 1.5%

Percent of US Participants: 6.3%

2 Middle Atlantic

Participation Rate: 3.4%

Percent of US Participants: 16.3%

5 East North Central

Participation Rate: 2.6%

Percent of US Participants: 14.1%

3 South Atlantic

Participation Rate: 3.0%

Percent of US Participants: 20.9%

9 East South Central

Participation Rate: 1.3%

Percent of US Participants: 2.8%

RAFTING

Rafting participation is lower than participation in kayaking and canoeing and, more than any other paddlesport, is dominated by casual participants. Perhaps due to destination-based guide services, permit restrictions and seasonal

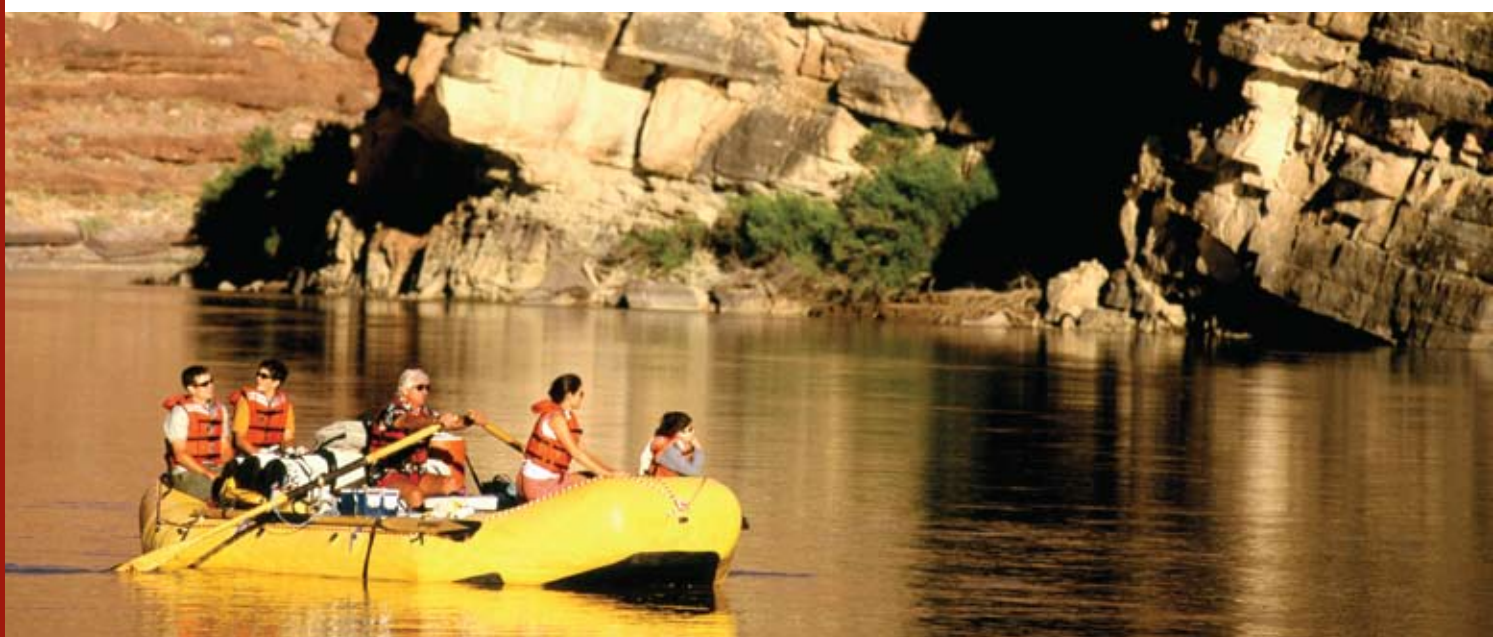
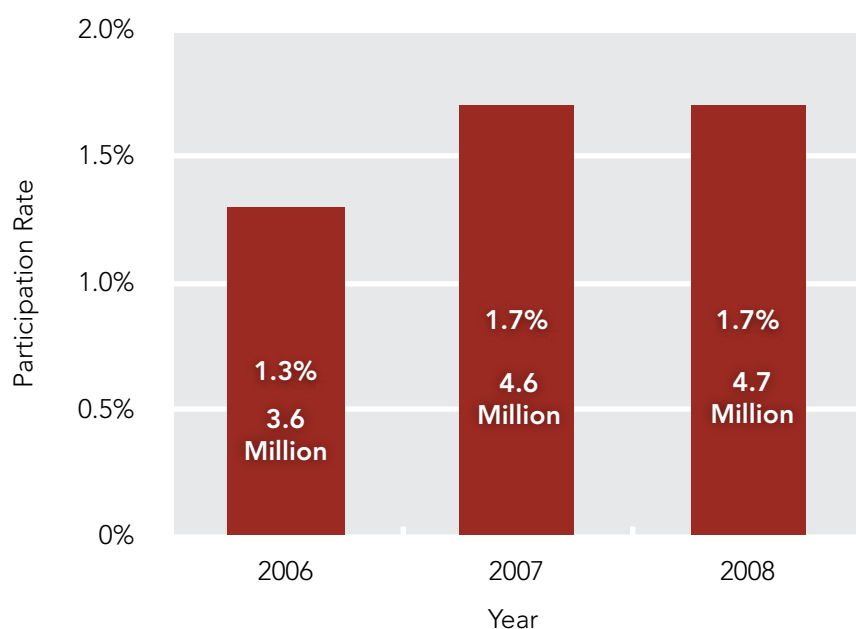
water levels, 43 percent of rafters make only one outing per year and 74 percent make three outings or less.

Overall, participation in rafting remains relatively steady and is

even increasing among adults ages 25 to 44. However participation has declined among youth ages 6 to 17 over the past two years — following a nationwide trend among youth seen in other outdoor activities.

Participation in Rafting

All Participants Ages 6+

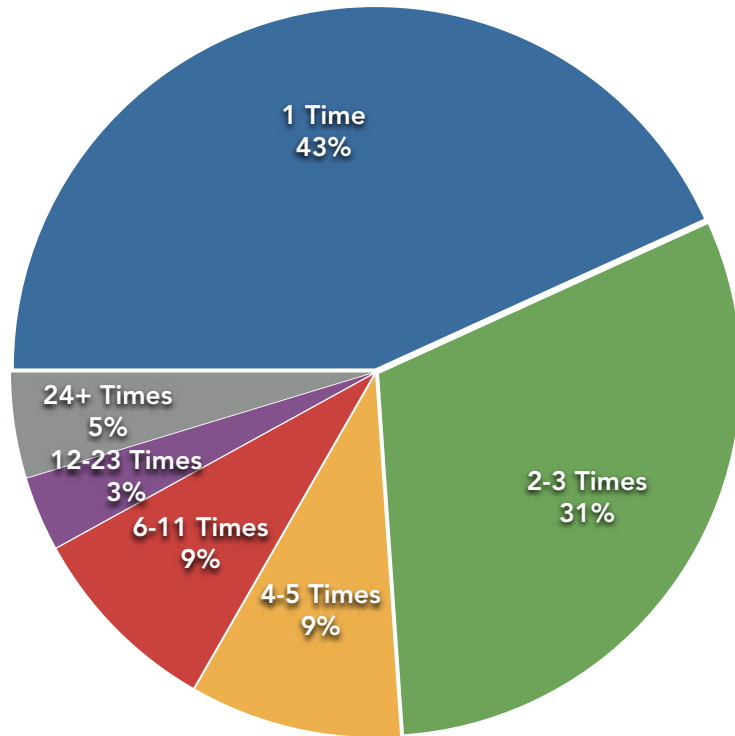


Annual Outings

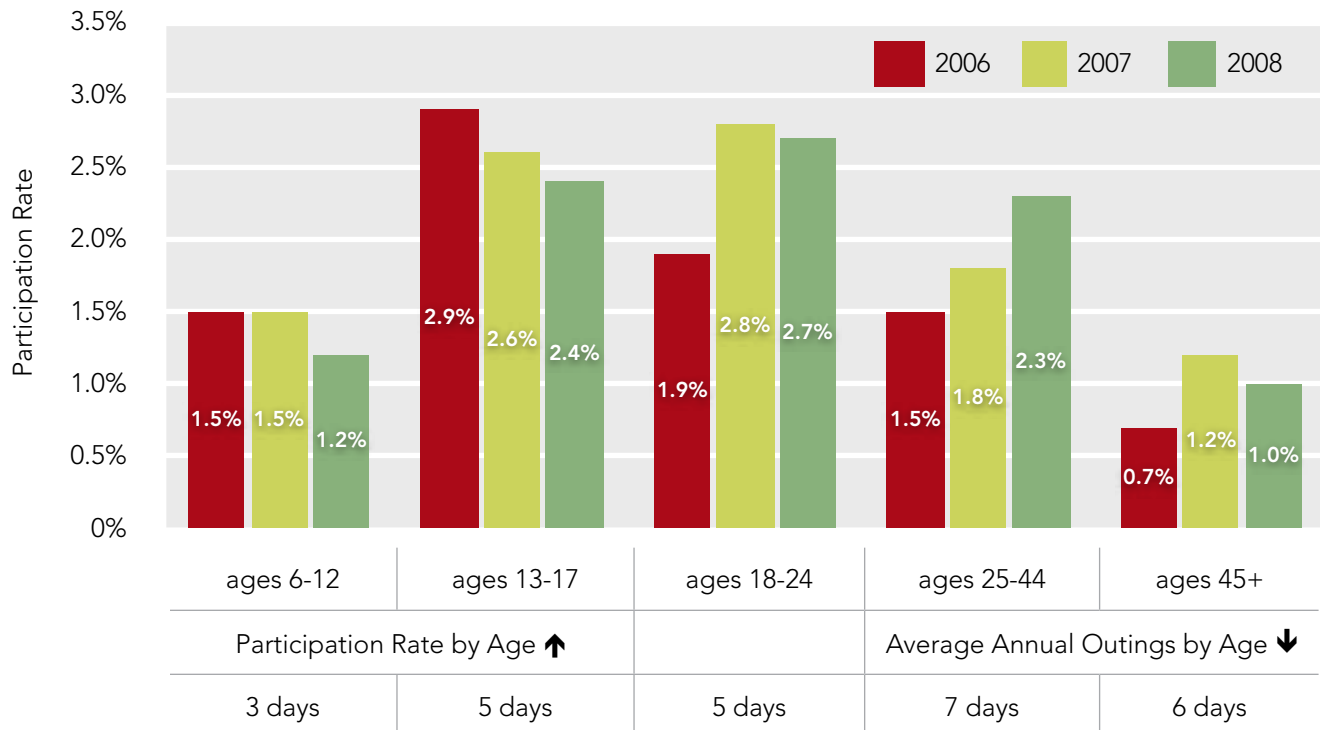
In 2008, rafting participants made 27.1 million annual outings. A large percentage of participants made only one outing in 2008, but others got out twice a month or more.

6 days

Rafters made an average of six outings each in 2008.

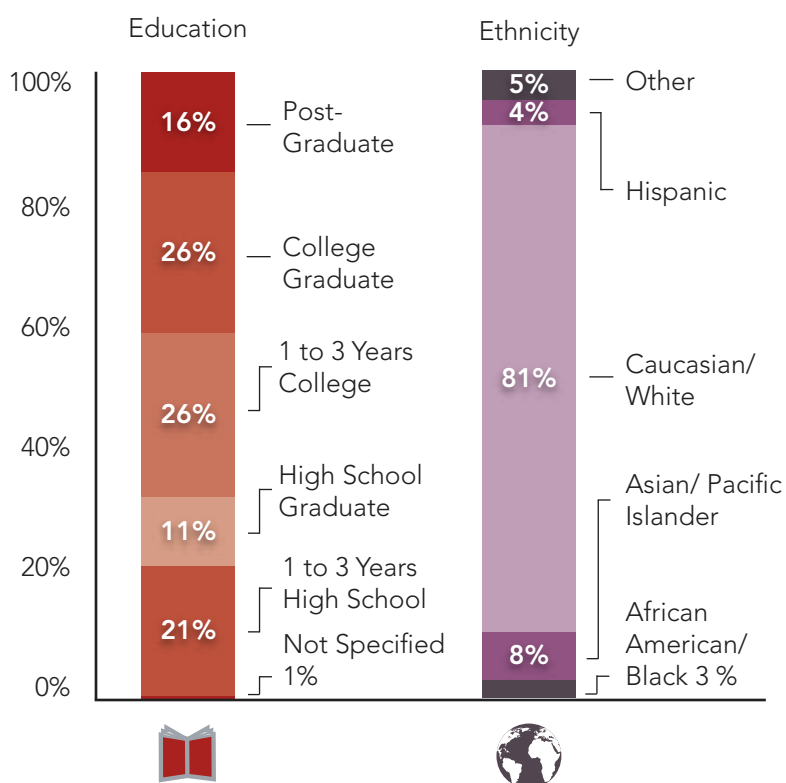
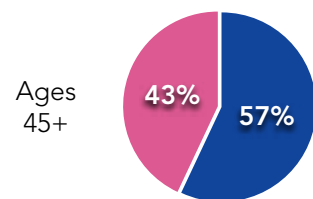
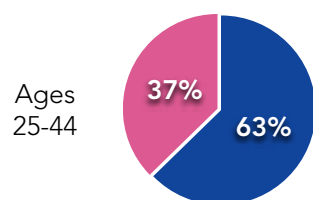
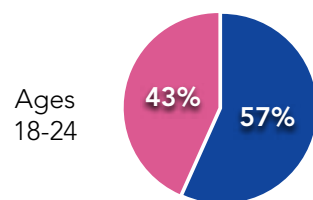
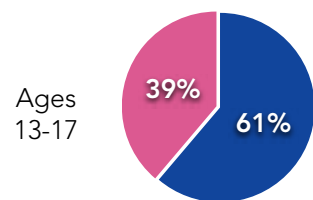
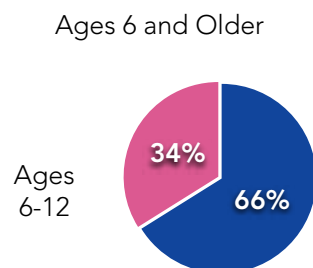
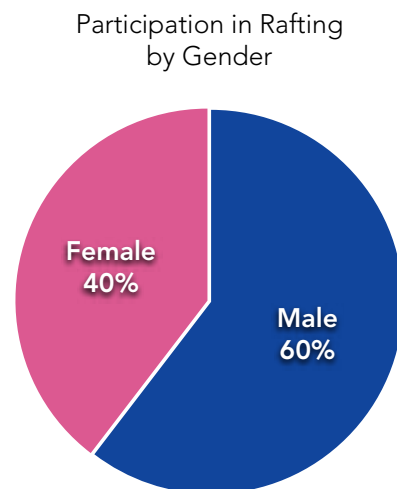
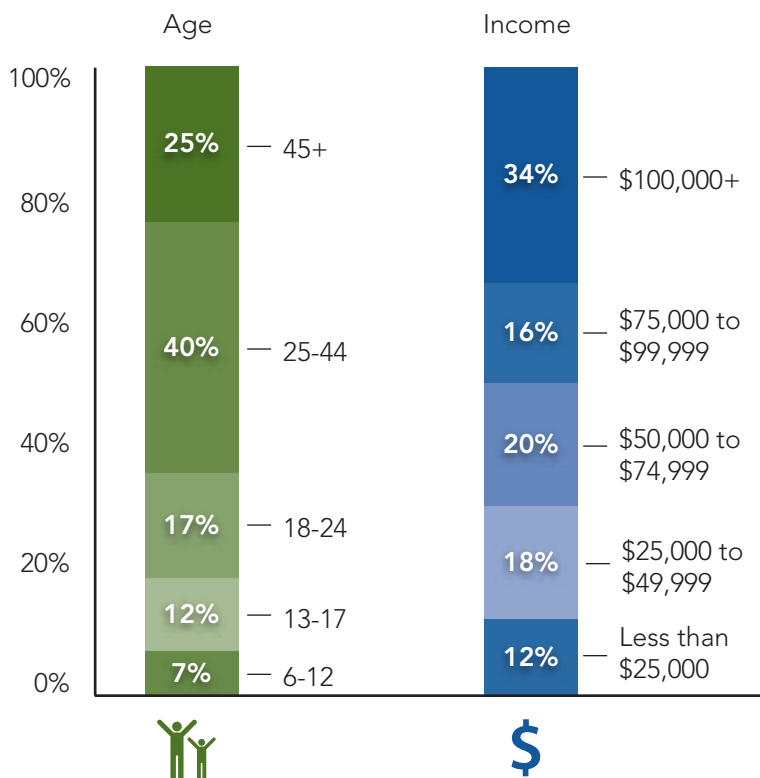


Participation in Rafting by Age
Years 2006, 2007 and 2008



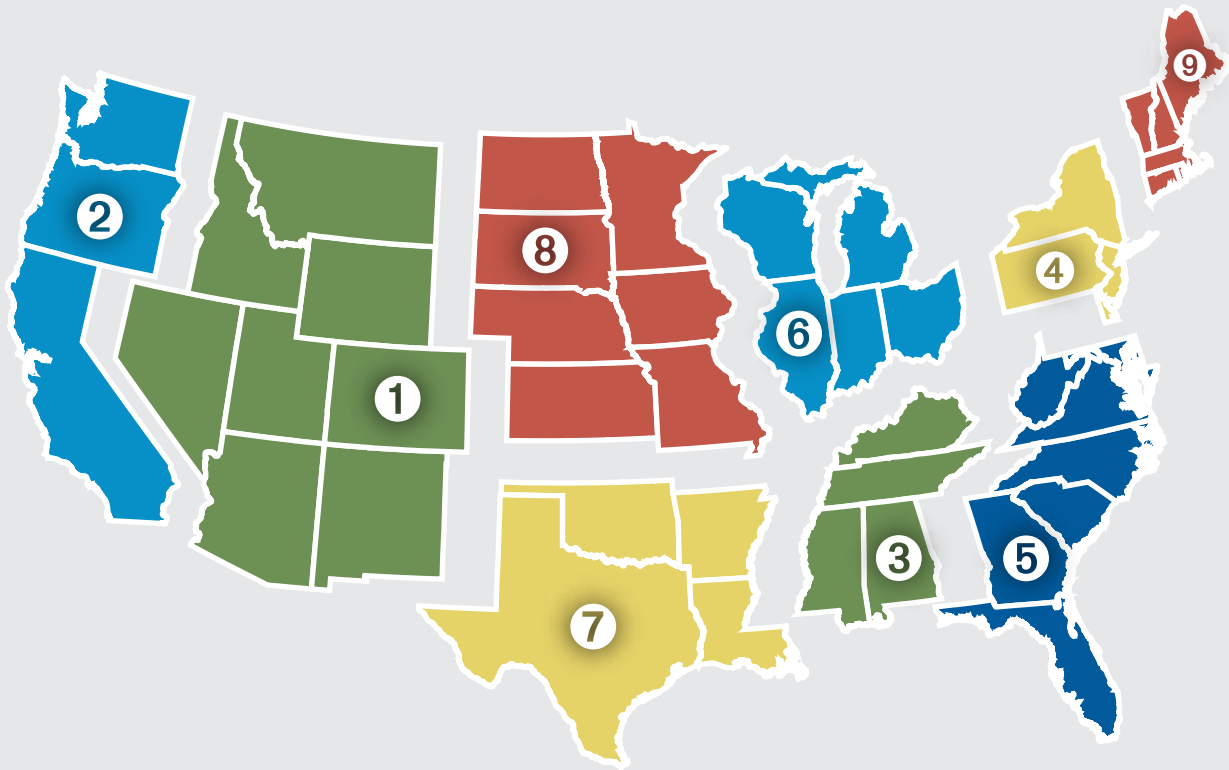
Demographics

Division of Rafting Participants by Demographic



Participation in Rafting by Census Region

All Americans, Ages 6 and Older



② Pacific

Participation Rate: 1.9%

Percent of US Participants: 18.1%

① Mountain

Participation Rate: 2.7%

Percent of US Participants: 11.6%

⑧ West North Central

Participation Rate: 1.3%

Percent of US Participants: 5.3%

⑦ West South Central

Participation Rate: 1.3%

Percent of US Participants: 8.6%

⑥ East North Central

Participation Rate: 1.5%

Percent of US Participants: 13.5%

③ East South Central

Participation Rate: 1.8%

Percent of US Participants: 6.3%

⑨ New England

Participation Rate: 1.3%

Percent of US Participants: 3.8%

④ Middle Atlantic

Participation Rate: 1.7%

Percent of US Participants: 13.5%

⑤ South Atlantic

Participation Rate: 1.6%

Percent of US Participants: 19.2%

CANOEING

Canoeing is the most popular type of paddling. Over the past three years it has experienced steady participation among Americans ages 6 and older.

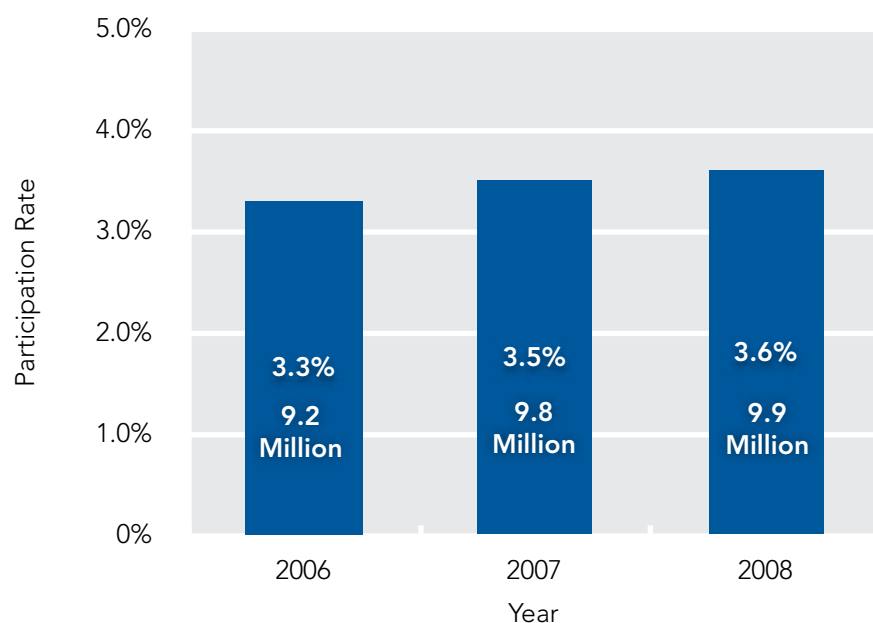
Although canoeing is more popular than kayaking, kayakers get out more frequently and have more

annual outings — 77.4 million compared to 69.5 million.

Geographically, most canoers — over 40% of all participants — are located in the East North Central and South Atlantic regions of the country, those states bordering the Great Lakes and Atlantic Ocean.

Participation in Canoeing

All Participants Ages 6+

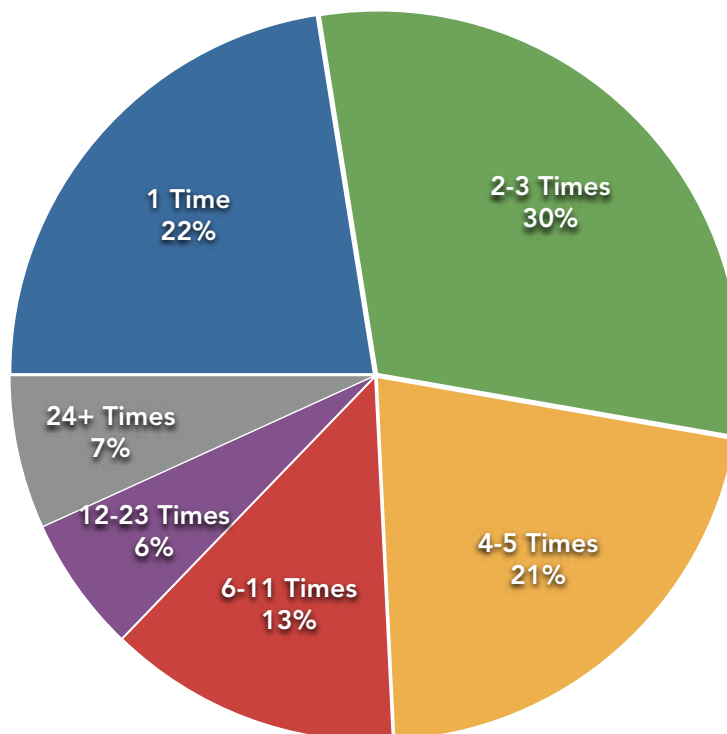


Annual Outings

In 2008, canoers made 69.5 million annual outings. For some participants, this meant getting out once a season and for others, once a month or more.

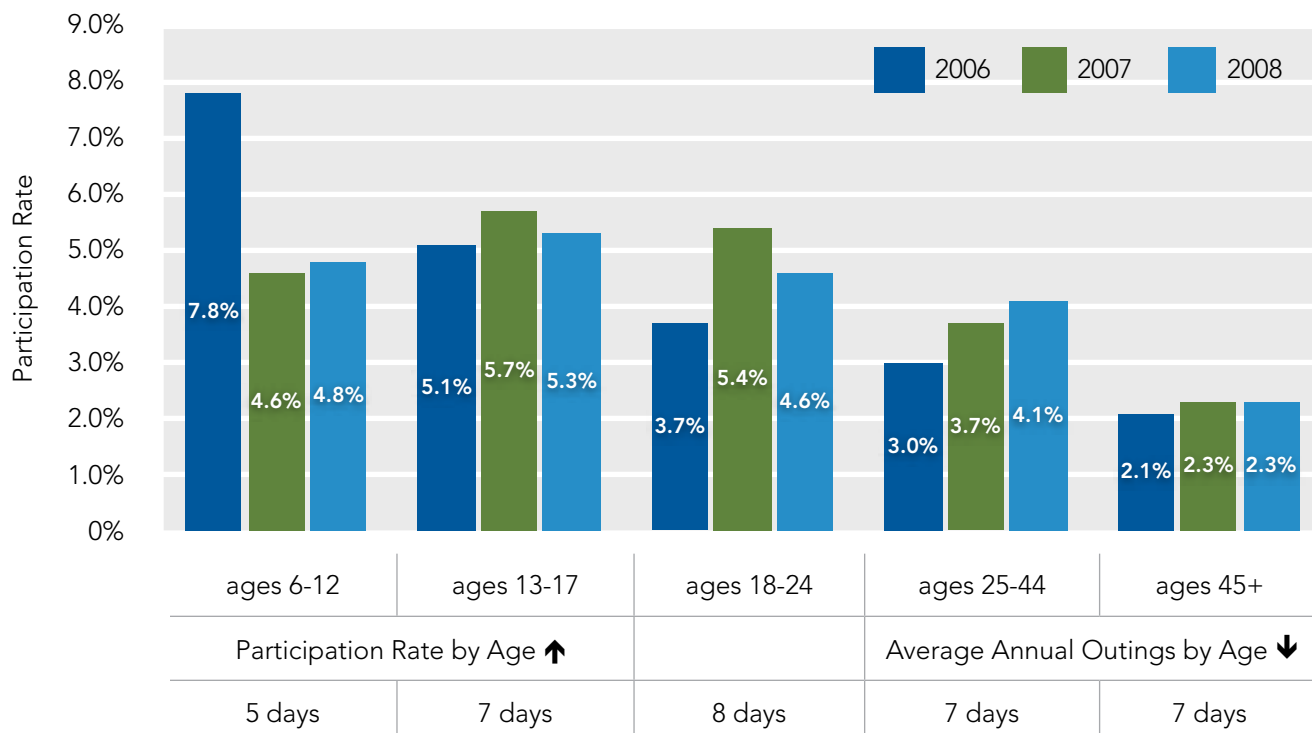
7 days

Canoers made an average of seven outings each in 2008.



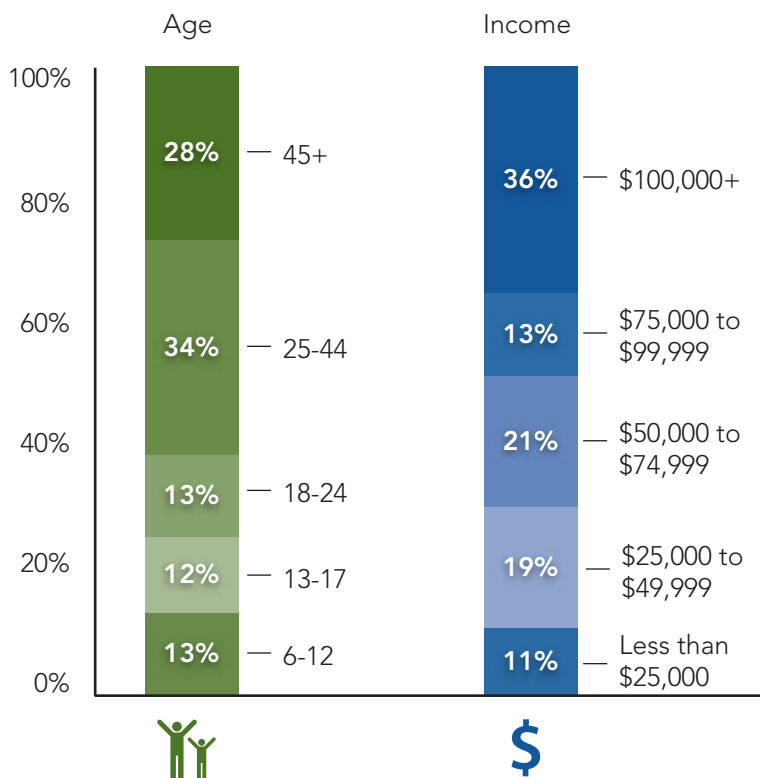
Participation in Canoeing by Age

Years 2006, 2007 and 2008

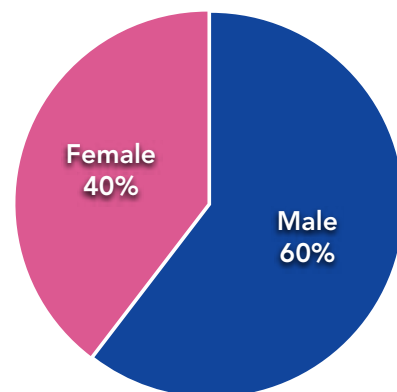


Demographics

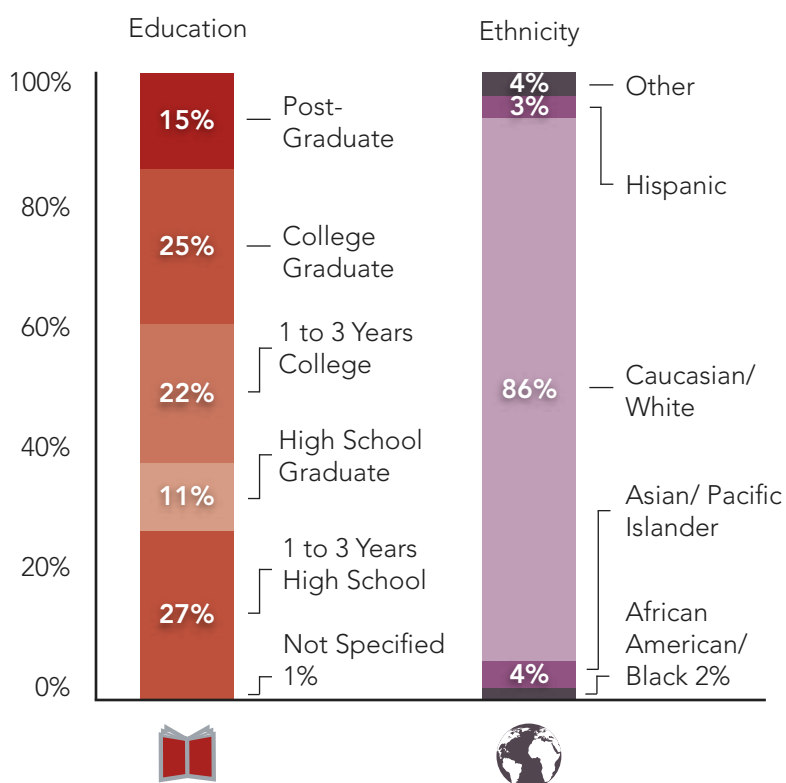
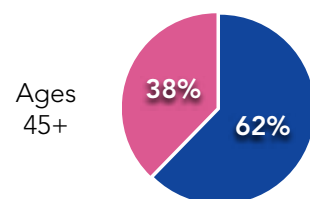
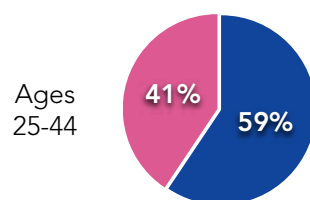
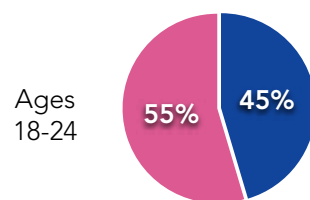
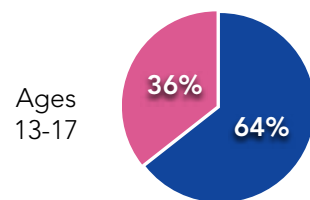
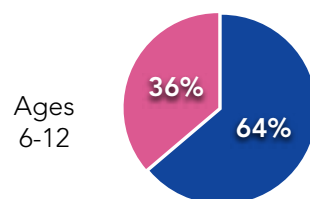
Division of Canoeing Participants by Demographic



Participation in Canoeing by Gender

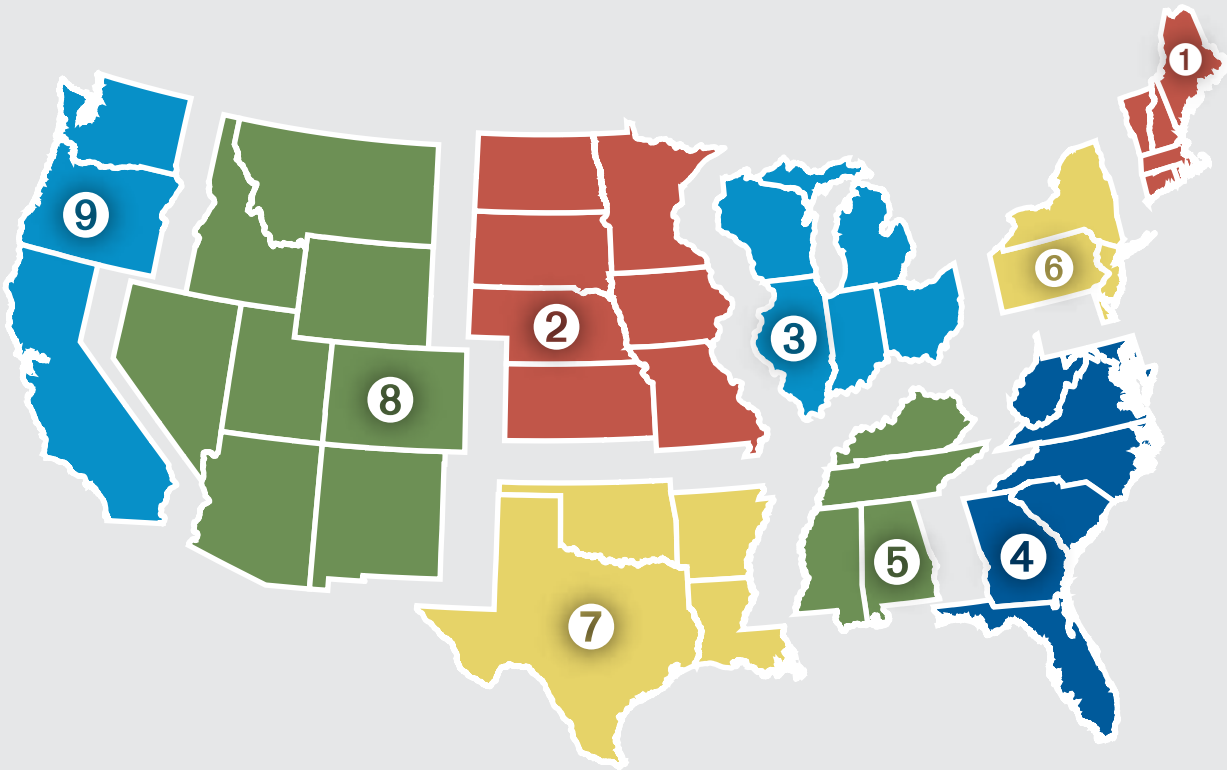


Ages 6 and Older



Participation in Canoeing by Census Region

All Americans, Ages 6 and Older



⑨ Pacific

Participation Rate: 1.9%

Percent of US Participants: 8.6%

② West North Central

Participation Rate: 5.5%

Percent of US Participants: 10.4%

① New England

Participation Rate: 6.2%

Percent of US Participants: 8.4%

⑧ Mountain

Participation Rate: 2.2%

Percent of US Participants: 4.4%

⑦ West South Central

Participation Rate: 2.4%

Percent of US Participants: 7.8%

⑥ Middle Atlantic

Participation Rate: 3.5%

Percent of US Participants: 13.2%

③ East North Central

Participation Rate: 4.7%

Percent of US Participants: 20.5%

④ South Atlantic

Participation Rate: 3.7%

Percent of US Participants: 20.6%

⑤ East South Central

Participation Rate: 3.7%

Percent of US Participants: 6.3%

MOTIVATIONS

Understanding the motivations and barriers to participation in outdoor activities among current paddlers is essential to efforts to recruit new participants and to turn current casual participants into enthusiasts. Key to this understanding is identifying what gets paddlers outdoors, who introduces paddlers to the outdoors and what keeps paddlers from getting outdoors more.

What Gets Paddlers Outdoors?

	Kayakers (All)	Rafters	Canoers
<i>It's relaxing.</i>	68% ❶	63% ❶	65% ❷
<i>It's a great way to get exercise.</i>	63% ❷	55% ❹	56% ❹
<i>It's fun.</i>	59% ❸	62% ❷	69% ❶
<i>I enjoy discovery and exploration.</i>	54% ❹	56% ❸	58% ❸
<i>I want to be healthy.</i>	51% ❺	41%	44%
<i>I get away from my usual routine.</i>	46%	47% ❺	53% ❺
<i>I like new experiences.</i>	42%	42%	41%
<i>I can participate in outdoor activities near where I live.</i>	36%	36%	37%
<i>I like challenges.</i>	34%	39%	32%
<i>I get a feeling of accomplishment.</i>	33%	30%	28%
<i>I can spend time with friends.</i>	31%	38%	33%

* What motivates you to participate in outdoor activities?





Who Introduces Paddlers to Outdoor Activities?

	Kayakers (All)	Rafters	Canoers
Friends	50% ❶	51% ❶	48% ❶
Parents	31% ❷	35% ❷	41% ❷
Myself (no one else influenced me)	30% ❸	26% ❹	26% ❹
Brothers, sisters, or other relatives	27% ❹	31% ❸	28% ❸
Community program (Boy Scouts, YMCA, neighborhood program)	11% ❺	13% ❺	16% ❺
TV, movies, magazines, books, websites about the outdoors	8%	8%	7%
Experienced mentor (trained and skilled)	8%	11%	6%
School program	7%	7%	7%
Media icon, sports figure, accomplished athlete	3%	4%	2%
Outdoor education program such as Outward Bound	3%	4%	3%

* Who influenced your decision to participate in outdoor activities?

BARRIERS

Why Don't Paddlers Participate in Outdoor Activities More Often?

	Kayakers (All)	Rafters	Canoers
<i>I don't have the time.</i>	56% ❶	56% ❶	55% ❶
<i>I don't want to spend the money on gear or equipment.</i>	17% ❷	19% ❷	16% ❸
<i>I'm not interested.</i>	17% ❸	17% ❸	19% ❷
<i>I'm involved in other activities such as team sports and fitness activities.</i>	14% ❹	13%	13% ❺
<i>I don't have friends to go with.</i>	13% ❺	14% ❺	11%
<i>I have too much schoolwork/work.</i>	13%	15% ❹	15% ❹
<i>I'm not in physical shape.</i>	9%	9%	6%
<i>There aren't places to participate in outdoor activities near where I live.</i>	9%	11%	8%
<i>I don't know how to get started, what to do, or where to go.</i>	9%	8%	8%
<i>I would rather spend free time watching TV/ movies, surfing the net, or playing video games.</i>	7%	9%	9%
<i>I'd rather spend time with friends.</i>	5%	8%	8%
<i>I don't like bugs or dirt.</i>	5%	5%	4%
<i>I don't enjoy exercise.</i>	4%	7%	5%
<i>My parents don't take me on outdoor activities.</i>	4%	4%	4%
<i>I'm worried I might get hurt.</i>	3%	3%	2%
<i>The outdoors are scary.</i>	2%	3%	1%

* What keeps you from participating in outdoor activities more?



Report Methodology

During January and February 2009 a total of 41,500 online interviews were carried out with a nationwide sample of individuals and households from the US Online Panel operated by Synovate. A total of 15,013 individual and 26,487 household surveys were completed. The total panel has over one million members and is maintained to be representative of the US population. Oversampling of ethnic groups took place to boost response from typically under-responding groups.

A weighting technique was used to balance the data to reflect the total US population aged six and above. The following variables were used: gender, age, income, household size, region and population density. The total population figure used

was 279,568,000 people aged six and above. The report details participation among all Americans, ages six and older.

The 2008 participation survey sample size of 41,500 completed interviews provides a high degree of statistical accuracy. All surveys are subject to some level of standard error—that is, the degree to which the results might differ from those obtained by a complete census of every person in the U.S. A sport with a participation rate of 5 percent of the total population has a confidence interval of plus or minus 0.21 percentage points at the 95 percent confidence level. This translates to plus or minus 4 percent of participants. Small groups, especially those with less than one million participants, can

be expected to fluctuate from year to year.

The survey methodology changed slightly in 2007 to include household interviews in addition to individual interviews. The two methodologies are comparable, and all results are indicative of the state of sports and leisure participation. Caution is recommended, however, in placing undue emphasis on trends extending back to 2006.

Charts in this report that break down participants by demographic may not always add up to 100% exactly. This is a result of rounding errors and the errors do not persist in the unrounded data.

A Partnership Project
of:



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