

SPECIAL REPORT ON FISHING AND BOATING

2010



A Partnership
Project of:



RECREATIONAL
BOATING & FISHING
FOUNDATION



OUTDOOR
FOUNDATION®

Methodology

During January and February 2010, a total of 40,141 online interviews were carried out with a nationwide sample of individuals and households from the US Online Panel operated by Synovate. A total of 15,067 individual and 25,074 household surveys were completed. The total panel has more than one million members and is maintained to be representative of the U.S. population. Oversampling of ethnic groups took place to boost response from typically underresponding 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 281,658,000 people aged six and above. The report details participation among all Americans: youth, young adults and adults.

The 2009 participation survey sample size of 40,141 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 five 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 four percent of participants. Small groups' participation, 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 undo emphasis on trends extending back to 2006.

In March of 2010, a total of 503 respondents to the January and February 2010 survey 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 6 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 6 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 2010 participation survey, which focused on American participation in the 2009 calendar year. 2006, 2007 and 2008 data noted in the report was collected in previous surveys.

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FISHING

Recreational fishing is the most popular nature-based outdoor activity for Americans of all ages, attracting more than 48 million participants. With 996 million outings in 2009, fishing is recognized as the top “gateway” activity —spurring involvement in other outdoor interests. In 2009, more than 77 percent of fishing enthusiasts participated in multiple outdoor activities.

Fishing still has significant strides to make with regard to females and minorities, however. Less than 35 percent of participants are female and 18 percent are from minority groups. The struggling economy has also had an effect on participation. More than 45 percent of fishing participants say the economy impacts how often they participate in outdoor activities. More than 85 percent of those plan to spend more time participating in outdoor activities in 2010.

Understanding motivations, barriers and demographics is key to reaching new audiences and inspiring existing enthusiasts. This section provides detailed information on all fishing participation and looks into the trends and traits of specific segments.

Total Participation

| | |
|-------------|--|
| 2006 | 49.7 million participants 18.3% of Americans age 6+ |
| 2007 | 51.8 million participants 18.7% of Americans age 6+ |
| 2008 | 48.2 million participants 17.2% of Americans age 6+ |
| 2009 | 48.0 million participants 17.0% of Americans age 6+ |

South Atlantic

19.4% of fishing participants live in the Southeast’s seven seaside states, a greater percentage than any other region

\$100,000+

The largest income bracket of fishing participants, just slightly larger than households making \$25,000 to \$49,999

67% Males

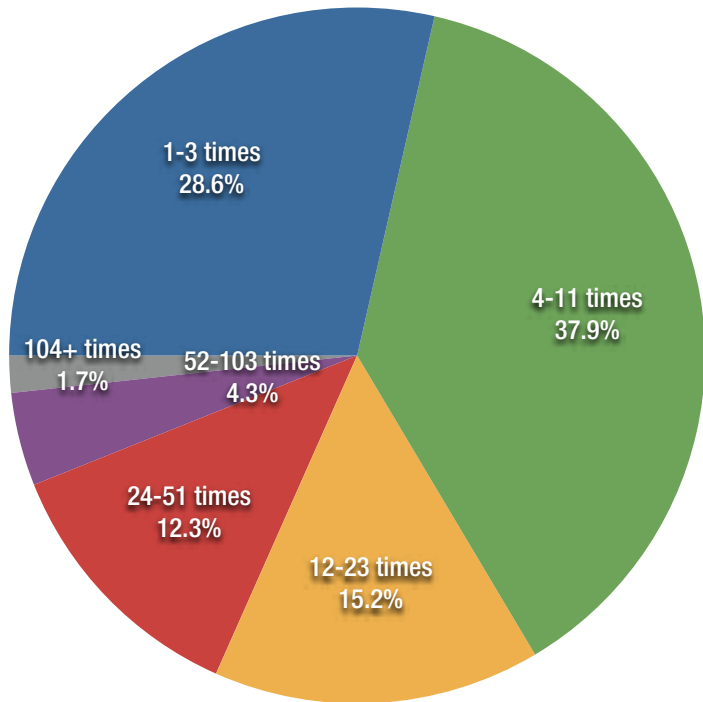
The majority of fishing participants are male

Annual Outings

In 2009, fishing participants made 996 million annual outings — either close to home or on an overnight trip. For some participants, this meant getting out once a week and for others, once a month or season.

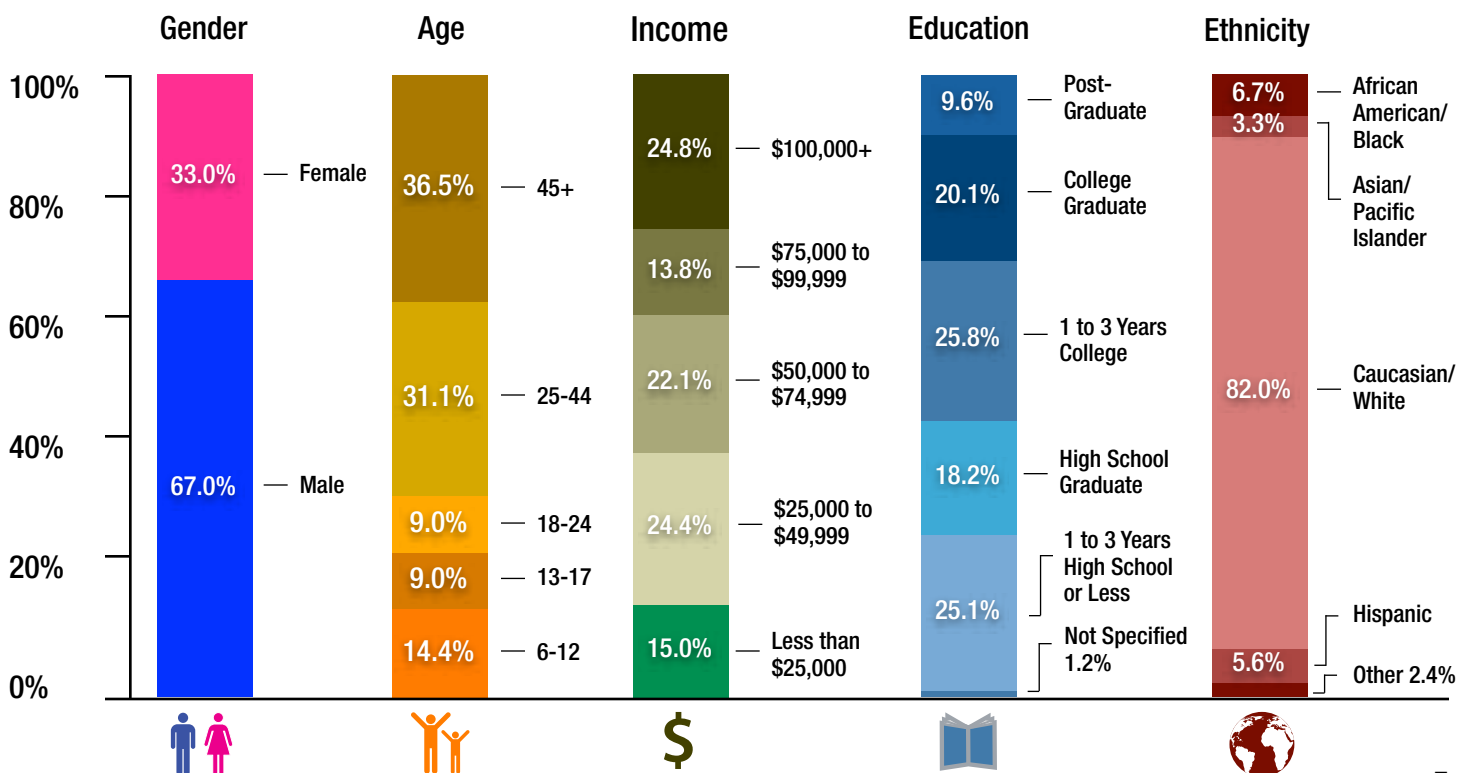
20.8 days

The average number of annual outings per fishing participant



Annual Outings Among Fishing Participants, Ages 6+

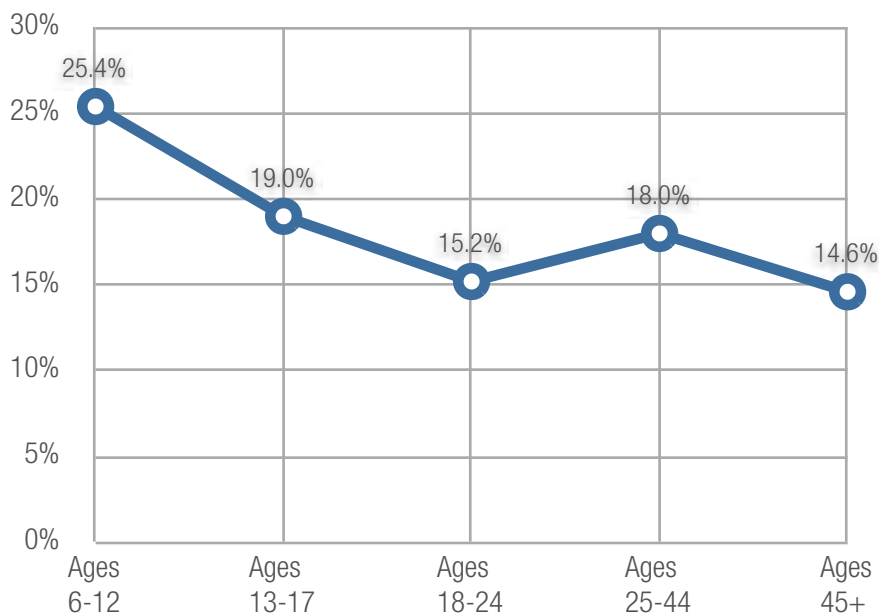
Demographics



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.

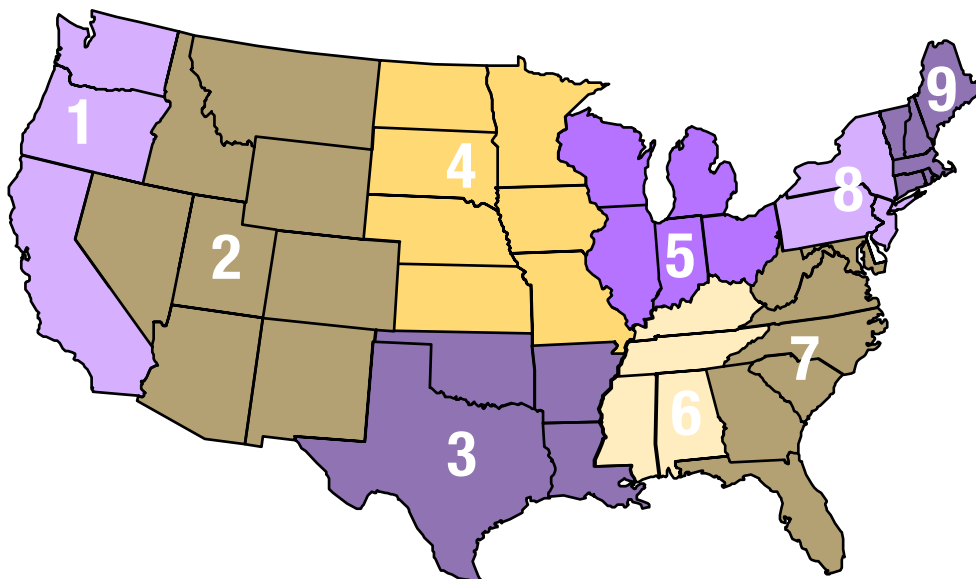
The life cycle of fishing participants is very similar to those of other outdoor activities. Although youth participation is initially high, it declines sharply in adolescence and young adulthood.



Geography of Participants

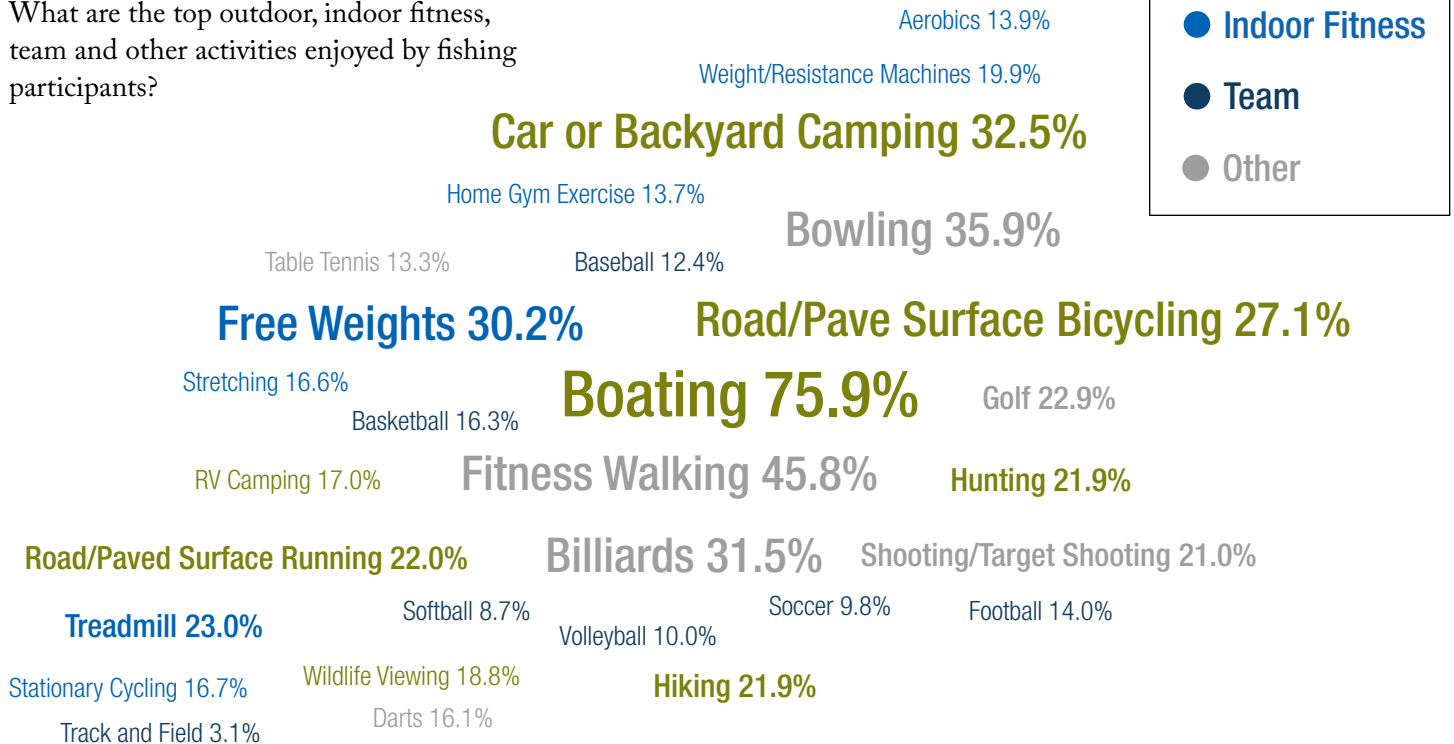
US Census Regions

1. Pacific: **11.7%**
2. Mountain: **7.9%**
3. West South Central: **11.6%**
4. West North Central: **9.1%**
5. East North Central: **18.2%**
6. East South Central: **7.8%**
7. South Atlantic: **19.4%**
8. Middle Atlantic: **10.3%**
9. New England: **4.0%**



Crossover Participation

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



Barriers Among Enthusiasts

Fishing participants must balance their enjoyment of fishing and the outdoors with other demands and responsibilities.

What keeps participants in fishing from participating more often in outdoor activities such as fishing, camping and biking?

- "Don't have the time." **49.4%**
- "Not interested." **15.2%**
- "Don't want to spend money on gear or equipment." **15.0%**
- "Not in physical shape." **11.0%**
- "Don't have friends to go with." **10.9%**
- "Too much work/schoolwork." **9.7%**

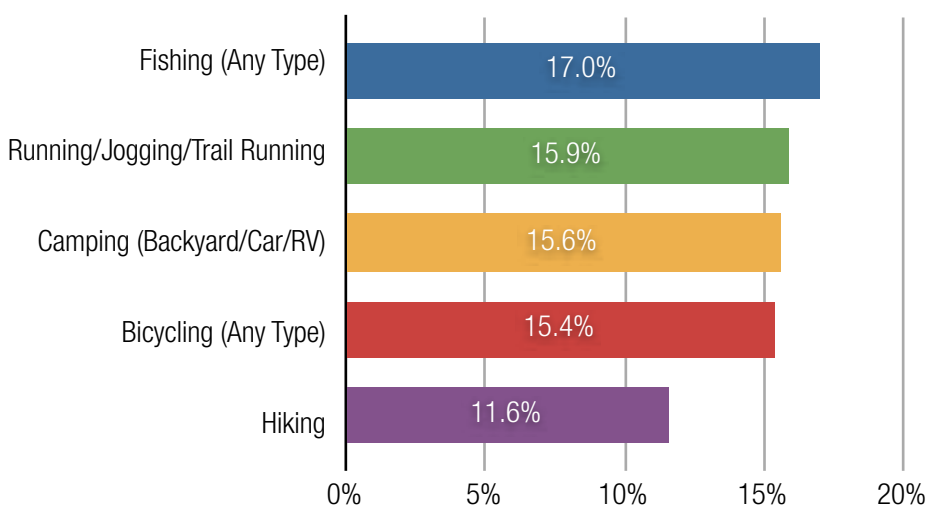
Based on 2008 data.

Fishing: A Gateway to the Outdoors

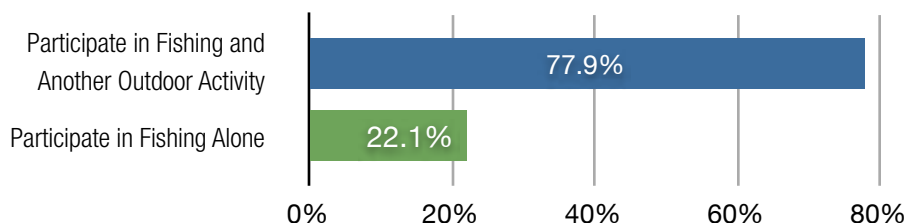
Participation in outdoor activities often begins with specific “gateway” outdoor activities. These activities — fishing, bicycling, running/jogging/trail running, camping and hiking — are popular, accessible and often lead to participation in other outdoor activities. Fishing is the most popular of these important and influential activities.

More than three quarters of fishing participants participate in multiple outdoor activities. Only a small percentage participate in fishing alone.

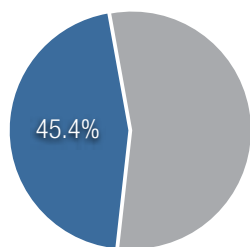
Participation in the Gateway Activities



Fishing Participants: Outdoor Enthusiasts



Fishing Participants' Time Outdoors

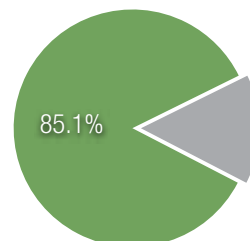


The Economy

45.4% of fishing participants say the economy impacts how often they participate in outdoor activities.

Plans for 2010

85.1% of fishing participants plan to spend more time participating in outdoor activities in 2010.

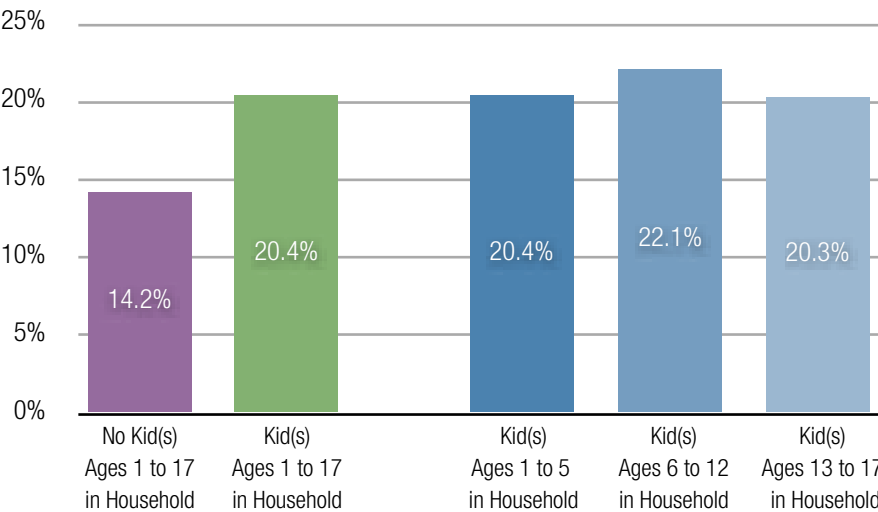




Participation in Fishing Among Adults with Youth in Their Households

Adults 18 and older with children in their household participate in fishing at higher levels than adults without children — despite the responsibilities and time commitments often associated with having younger children in the home.

20.4 percent of adults age 18 and older with children ages 1 to 17 in their household participate in fishing, while only 14.2 percent of adults without children in their household participate.



Perceptions of Conservation Among Fishing Participants

| | Fishing Participants | Fishing Non-Participants |
|---|----------------------|--------------------------|
| Preserving undeveloped land for outdoor recreation is important. | 90.2% Yes | 80.1% Yes |
| Developed parks/biking/walking trails in my neighborhood are important. | 82.5% Yes | 76.5% Yes |
| I have volunteered/donated to support environmental/conservation efforts. | 39.3% Yes | 28.7% Yes |
| There should be more outdoor education/activities during the school day. | 83.3% Yes | 72.6% Yes |
| I regularly vote | 64.9% Yes | 66.1% Yes |



FRESHWATER FISHING

Freshwater fishing, with 41 million participants in 2009, is by far the most popular type of fishing in the United States. With more than 725 million annual outings and representing more than 14 percent of the U.S. population, it is followed by saltwater fishing and fly fishing. It is also the most popular among youth, with more than 22.5 percent participation between the ages of 6 and 18. Freshwater fishing has the highest female participation and conversely the lowest minority participation. Five percent of freshwater fishing participants tried the sport for the first time in 2009.

Most individuals across the United States have easy access to freshwater lakes, rivers and ponds and are well represented in all regions across the country. The East North Central region, specifically the five states bordering the Great Lakes, has the highest percentage of freshwater fishing participants in the nation at nearly 20 percent.

Total Participation

| | |
|-------------|--|
| 2006 | 43.1 million participants 16.3% of Americans age 6+ |
| 2007 | 43.9 million participants 15.8% of Americans age 6+ |
| 2008 | 40.3 million participants 14.4% of Americans age 6+ |
| 2009 | 41.0 million participants 14.5% of Americans age 6+ |

1 to 3 Years College

The largest education bracket of freshwater fishing participants

36.9% Females

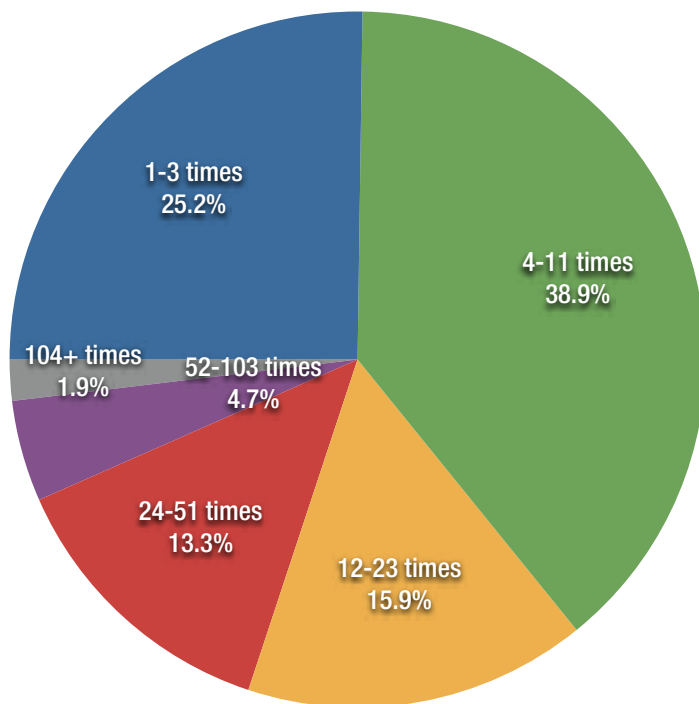
The percentage of female participants is higher in freshwater fishing than saltwater fishing and fly fishing

Annual Outings

In 2009, freshwater fishing participants made 725 million annual outings — either close to home or on an overnight trip. A significant percentage of these participants (39%) get out between once a season and once a month.

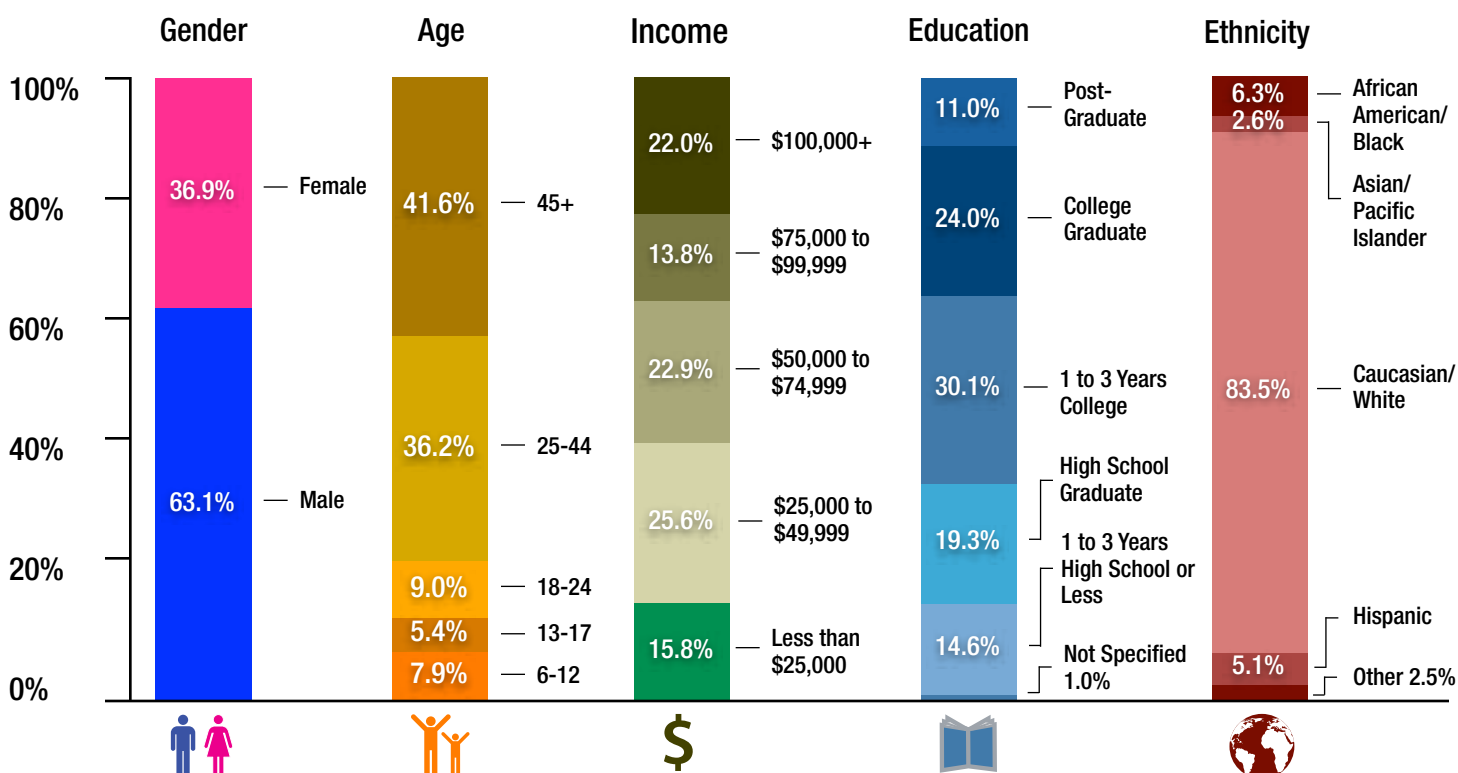
17.7 days

The average number of annual outings per freshwater fishing participant



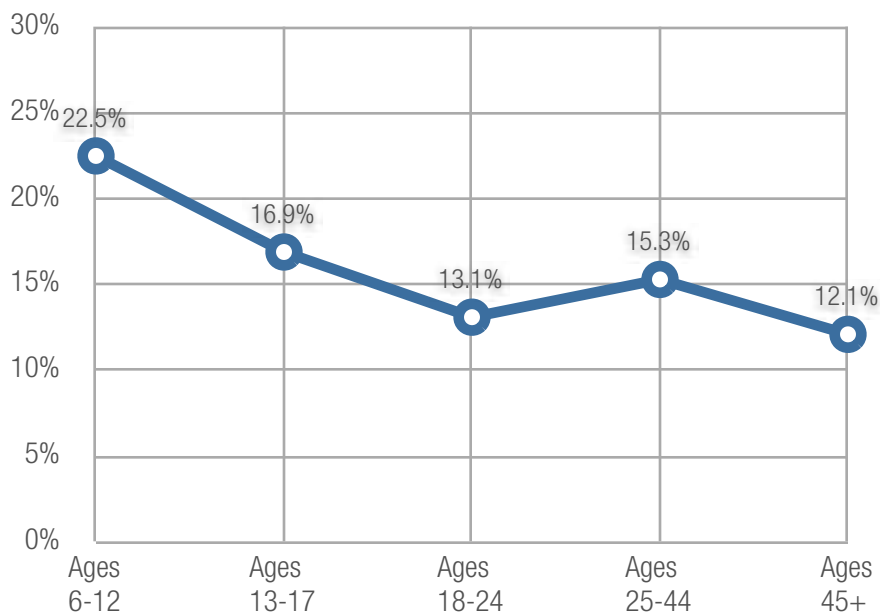
Annual Outings Among Freshwater Fishing Participants, Ages 6+

Demographics



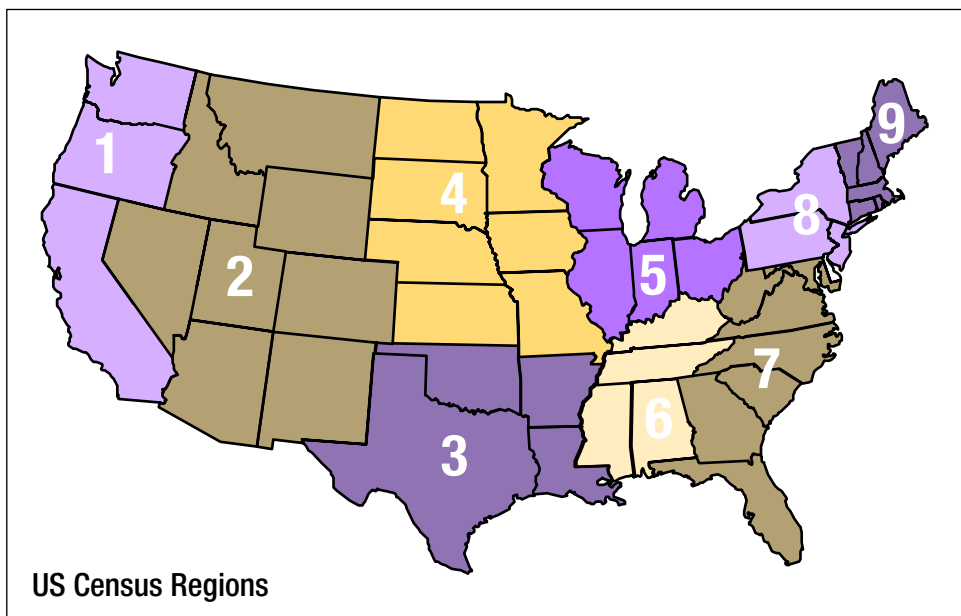
Participation Life Cycle

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

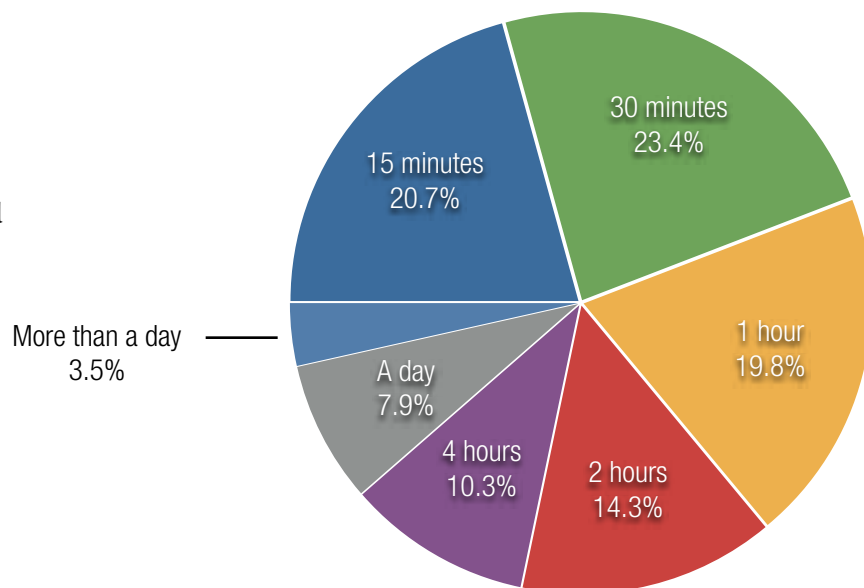
1. Pacific: **11.6%**
2. Mountain: **8.9%**
3. West South Central: **12.4%**
4. West North Central: **10.0%**
5. East North Central: **19.3%**
6. East South Central: **8.0%**
7. South Atlantic: **17.0%**
8. Middle Atlantic: **8.9%**
9. New England: **3.9%**





Time Traveled from Home

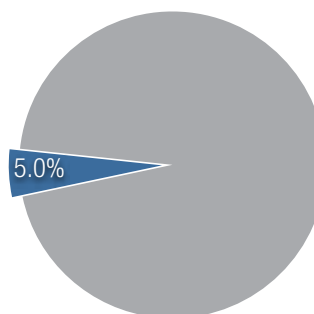
Freshwater fishing participants can travel anywhere from a few minutes to a few days from home to go fishing. Surveying the time freshwater participants traveled on their last in-season freshwater fishing trip reveals how far they usually travel and how often fishing leads them on more distant excursions.



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

First-Time Participants

5.0% of freshwater fishing participants tried the sport for the first time in 2009



Freshwater Fishing Participants, Ages 6+

Competition and Overnight Travel

2.8% of freshwater fishing participants ages 6 and older compete in freshwater fishing.

38.3% of freshwater fishing participants ages 6 and older travel overnight to participate in freshwater fishing.

* Based on 2008 data



SALTWATER FISHING

Saltwater fishing is the second most popular form of fishing, drawing 12.3 million participants in 2009 or 4.4 percent of the population, down slightly from 2008. The largest age bracket of saltwater fishing participants is over the age of 45, making up 48.1 percent of all participants.

More than 36 percent of saltwater fishing participants live along the southern east coast — a higher percentage than any other region. Eight percent of saltwater fishing participants tried the sport for the first time in 2009, and the sport shows the highest percentage of those willing to travel more than a day to participate at nearly 7 percent.

Enthusiasts of saltwater fishing are, on average, wealthier than freshwater enthusiasts — the largest income bracket among these participants is \$100,000 and higher. In terms of diversity, this report shows that saltwater fishing attracts the most minorities of the three fishing types — nearly 24 percent of saltwater participants are minorities, compared to 21.5 percent for fly fishing and 16.5 percent for freshwater.

South Atlantic

36.1% of saltwater fishing participants live along the southern Eastern coast — a higher percentage than any other region

Ages 45+

The largest age bracket of saltwater fishing participants, making up 48.1% of all participants

Total Participation

| | |
|------|---|
| 2006 | 12.5 million participants 4.6% of Americans age 6+ |
| 2007 | 14.4 million participants 5.2% of Americans age 6+ |
| 2008 | 13.8 million participants 4.9% of Americans age 6+ |
| 2009 | 12.3 million participants 4.4% of Americans age 6+ |

Annual Outings

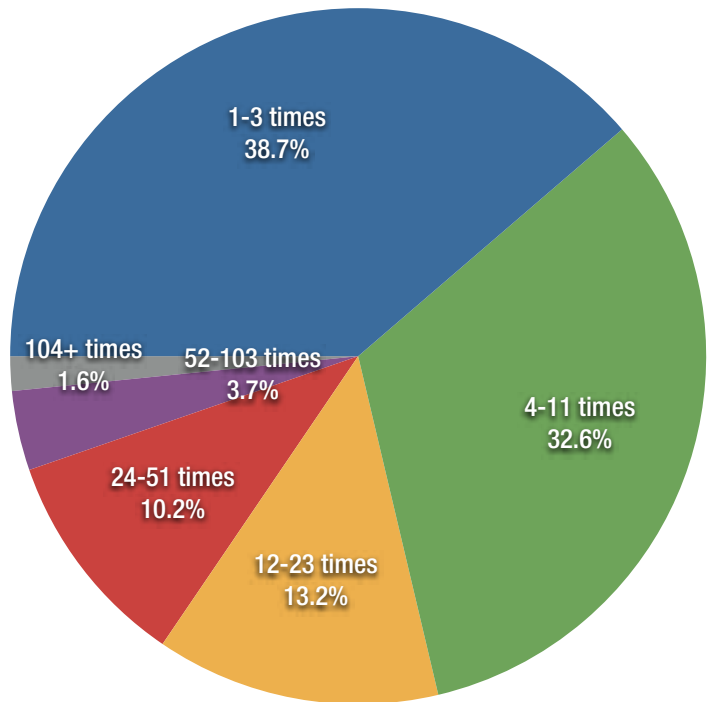
In 2009, saltwater fishing participants made 184 million annual outings — either close to home or on an overnight trip. More than two thirds of participants made an average of one outing per month or less.

14.9 days

The average number of annual outings per saltwater fishing participant

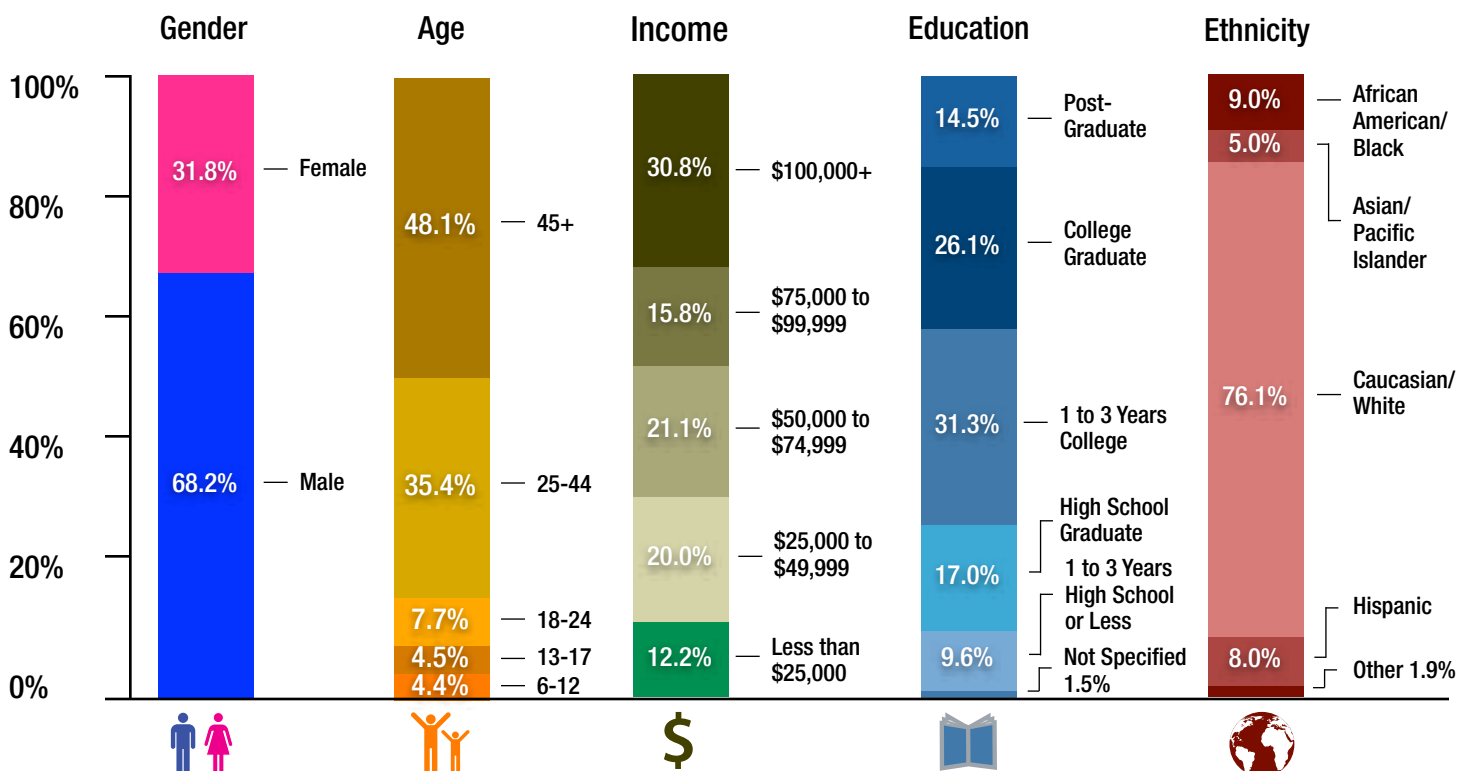
\$100,000+

The largest income bracket of saltwater fishing participants



Annual Outings Among Saltwater Fishing Participants, Ages 6+

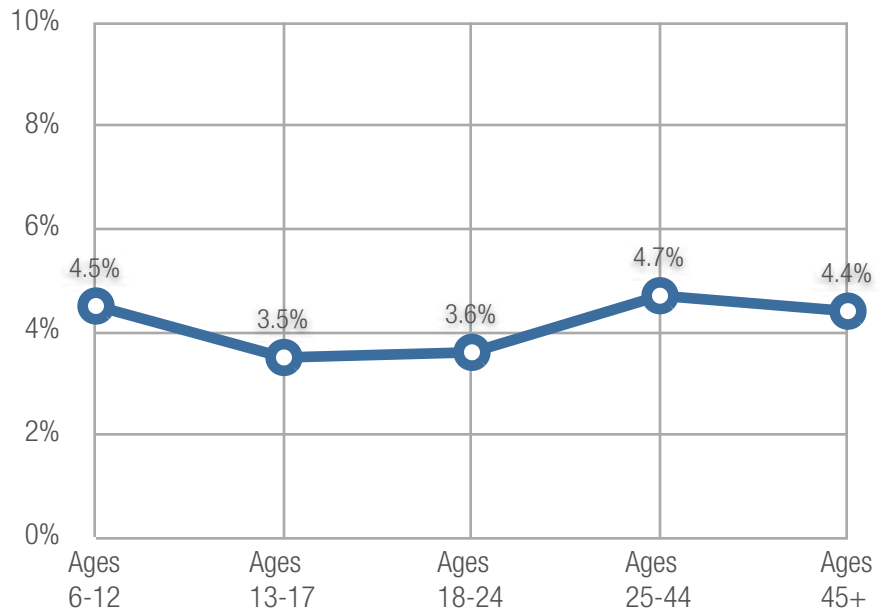
Demographics



Participation Life Cycle

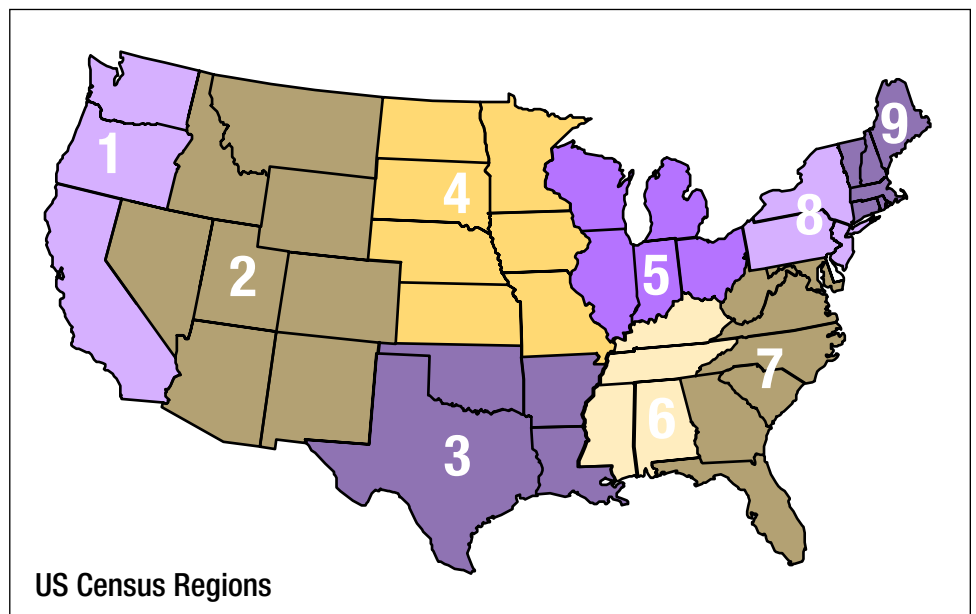
The participation rate among different age groups varies as individuals age and their lives are shaped by their environment and life experiences. A one-year snapshot of saltwater fishing participation helps describe this life cycle of participation.

Unlike many other outdoor activities, saltwater fishing participation increases among ages 25 to 44, rising higher than participation among ages 6 to 12.



Geography of Participants

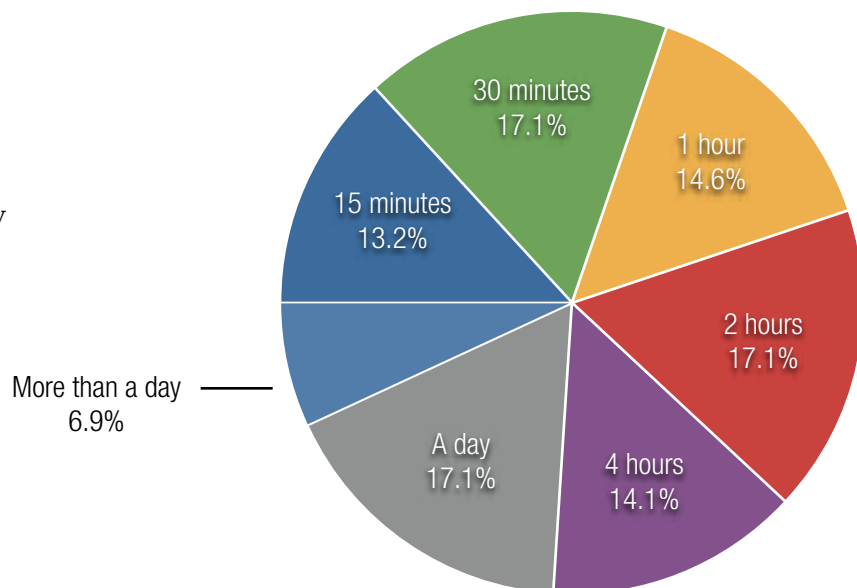
1. Pacific: **15.5%**
2. Mountain: **2.9%**
3. West South Central: **12.9%**
4. West North Central: **2.0%**
5. East North Central: **5.7%**
6. East South Central: **4.6%**
7. South Atlantic: **36.1%**
8. Middle Atlantic: **14.5%**
9. New England: **5.8%**





Time Traveled from Home

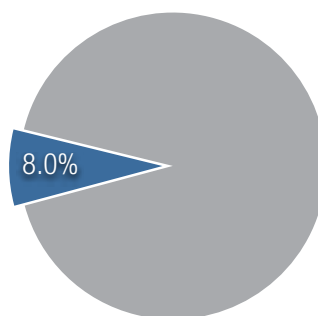
Saltwater fishing participants can travel anywhere from a few minutes to a few days from home to go fishing. Surveying the time saltwater participants traveled on their last in-season saltwater fishing trip reveals how far they usually travel and how often fishing leads them on more distant excursions.



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

First-Time Participants

8.0% of saltwater fishing participants tried the sport for the first time in 2009



Saltwater Fishing Participants, Ages 6+

Competition and Overnight Travel

1.8% of saltwater fishing participants ages 6 and older compete in saltwater fishing.

44.4% of saltwater fishing participants ages 6 and older travel overnight to participate in saltwater fishing.

* Based on 2008 data



FLY FISHING

With a dedicated group of just 5.6 million Americans, fly fishing accounts for only 2 percent of Americans but represents 87 million annual outings. Nearly three-quarters of these participants are male, and most fall in the \$100,000 and higher income bracket.

Unlike many other outdoor activities, participation among these enthusiasts is skewed much older, with 83.9 percent of participants ages 25 and older and only 16.1 percent of participants ages 6 to 24.

Fly fishing has significant growth opportunities across a number of demographics, particularly females (25.2 percent of participants), minority groups (21.5 percent of participants) and youth (16.1 percent of participants). Encouraging figures show that 11.6 percent of fly fishing participants tried the sport for the first time in 2009.

Easy access to great fly fishing areas across the country results in a broad representation, but most fly fishing participants live in the nation's central mountain states and California, Oregon and Washington.

Pacific and Mountain

Most fly fishing participants live in the nation's central mountain states and California, Oregon and Washington

Males

74.8% of fly fishing participants are male

Total Participation

| | |
|-------------|--|
| 2006 | 6.1 million participants 2.2% of Americans age 6+ |
| 2007 | 5.8 million participants 2.1% of Americans age 6+ |
| 2008 | 5.9 million participants 2.1% of Americans age 6+ |
| 2009 | 5.6 million participants 2.0% of Americans age 6+ |

7.8%

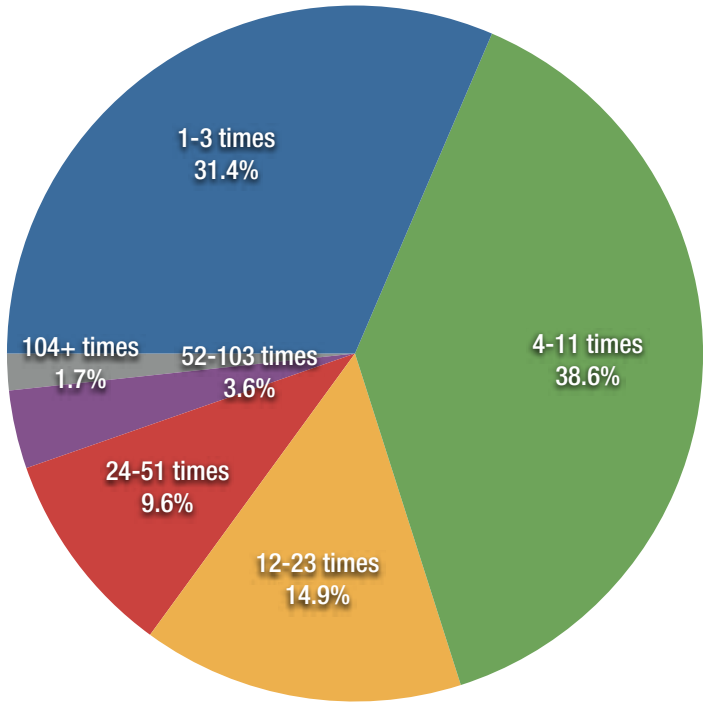
The percentage of fly fishing participants under the age of 18 — lower than freshwater fishing and saltwater fishing

Annual Outings

In 2009, fly fishing participants made 87 million annual outings — either close to home or on an overnight trip. More than one third of participants get out between once a season and once a month.

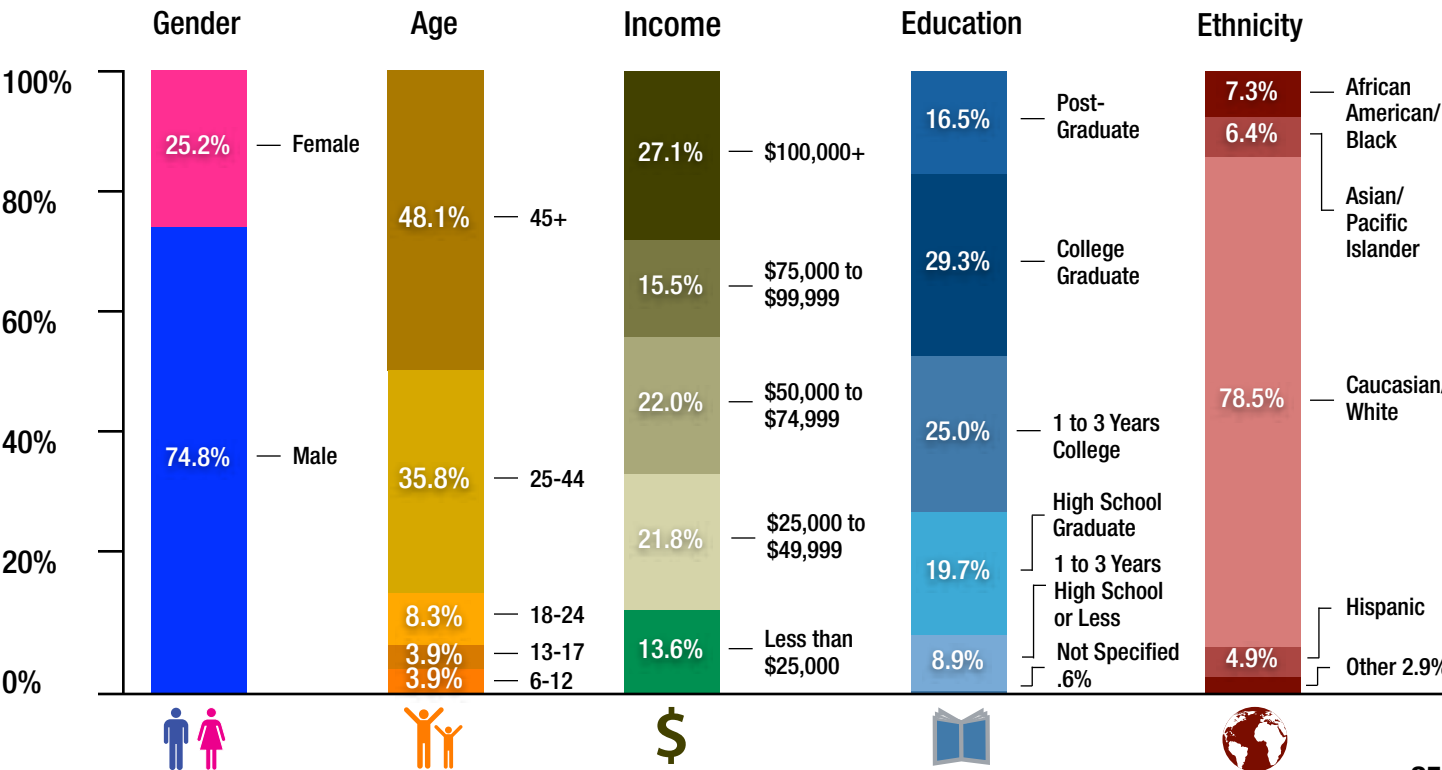
15.6 days

The average number of annual outings per fly fishing participant



Annual Outings Among Fly Fishing Participants, Ages 6+

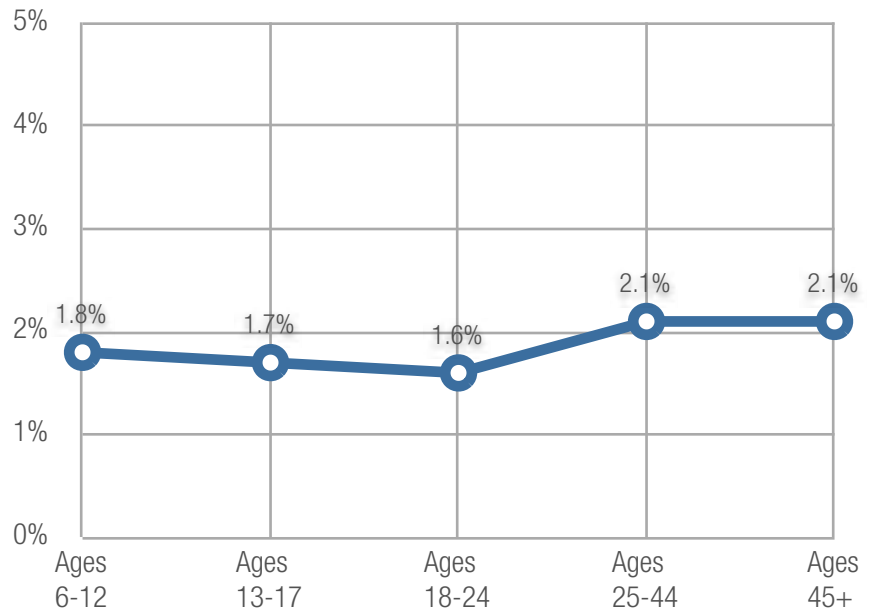
Demographics



Participation Life Cycle

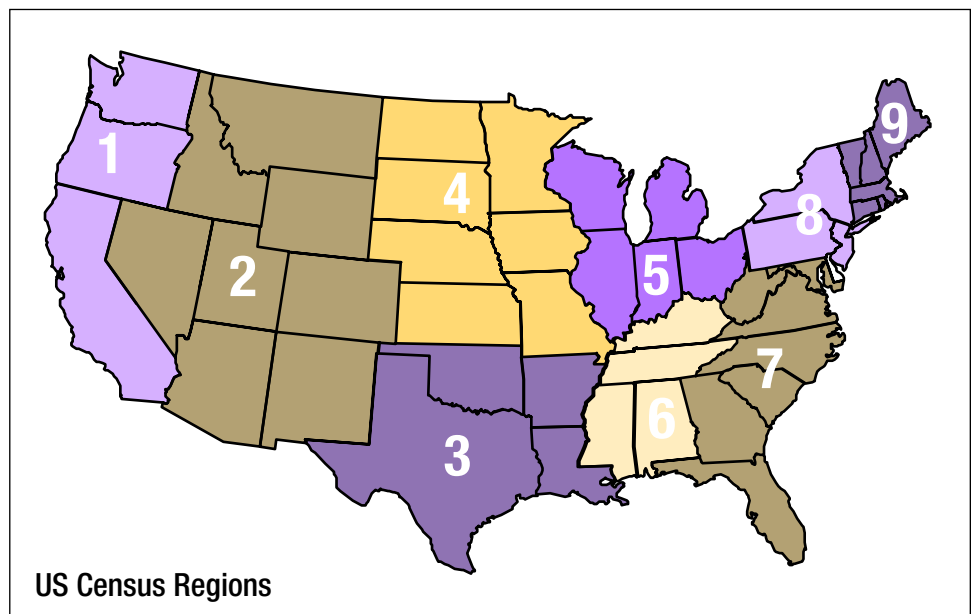
The participation rate among different age groups varies as individuals age and their lives are shaped by their environment and life experiences. A one-year snapshot of fly fishing participation helps describe this life cycle of participation.

Participation in fly fishing is higher in older age brackets than younger brackets. Only 7.8% of fly fishing participants are under the age of 18.



Geography of Participants

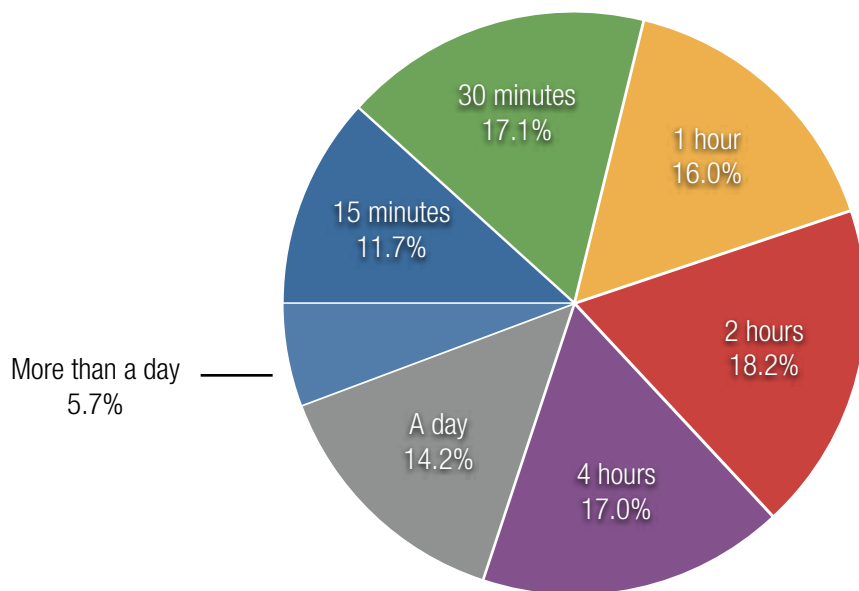
1. Pacific: **16.2%**
2. Mountain: **16.6%**
3. West South Central: **8.7%**
4. West North Central: **7.0%**
5. East North Central: **13.8%**
6. East South Central: **6.2%**
7. South Atlantic: **13.7%**
8. Middle Atlantic: **12.8%**
9. New England: **5.0%**





Time Traveled from Home

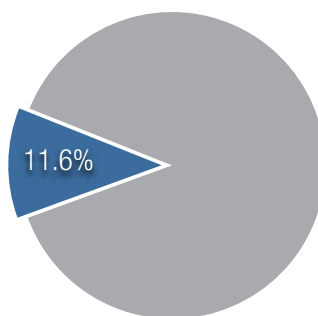
Fly fishing participants can travel anywhere from a few minutes to a few days from home to go fishing. Surveying the time fly participants traveled on their last in-season fly fishing trip reveals how far they usually travel and how often fishing leads them on more distant excursions.



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

First-Time Participants

11.6% of fly fishing participants tried the sport for the first time in 2009



Fly Fishing Participants, Ages 6+

Competition and Overnight Travel

20.1% of fly fishing participants ages 6 and older compete in fly fishing.

45.2% of fly fishing participants ages 6 and older travel overnight to participate in fly fishing.

* Based on 2008 data



YOUTH

With more than 6.9 million participants ages 6 to 12 in 2009, 25.4 percent of the youngest ages tracked in this report are fishing participants. By the ages of 13 to 17, however, only 19 percent participate, many citing barriers of time, other sports/activities, schoolwork, TV and video games. Like participation in many outdoor activities, boys' and girls' participation in fishing falls through adolescence. Girls participation, however, falls significantly more than boys, down 44.0 percent as opposed to 12.9 percent in 2009.

The future of any sport lies in engaging its youngest members. This report shows that 'next-gen' anglers, those under 18 years of age, make up more than 23 percent of all fishing participants. Reaching individuals in their early years is critical, according to past research by The Outdoor Foundation, which shows that 90 percent of adult outdoor enthusiasts were introduced to nature-based activities between the ages of 5 and 18.

This section focuses on youth and includes key insights on demographics, motivations and barriers.

46.9%

The percentage of youth ages 13 to 17 whose friends influenced their decision to participate in outdoor activities

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 |

Parents

Cited by 81.8% of youth fishing participants ages 6 to 12 as an influence in their decision to participate in outdoor activities

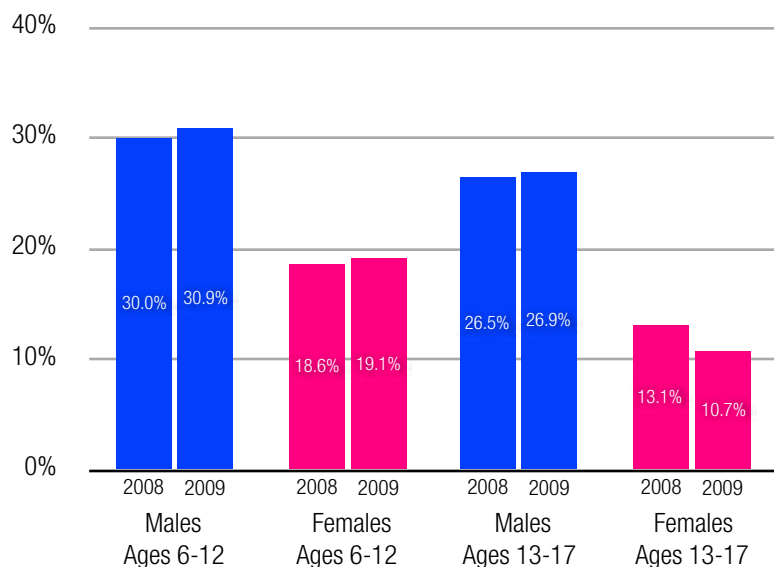
Boys and Girls

Like participation in many outdoor activities, boys' and girls' participation in fishing declines in adolescence, ages 13 to 17. Girls participation, however, declines significantly more than boys, down 44.0% from ages 6 to 12 to ages 13 to 17 in 2009, as opposed to 12.9% among boys.

30.9%

The percentage of boys ages 6 to 12 that participates in fishing

Youth Participation in Fishing



11.2 Million

The number of fishing participants ages 6 to 17, unchanged from 2008

Who Introduces Youth Fishing Participants to Outdoor Activities?

| "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, web sites 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% |

Based on 2008 data.

What Do Youth Fishing Participants Enjoy about Outdoor Activities?

| "What motivated your decision to participate in outdoor activities?" | Ages 6 to 12 | Ages 13 to 17 |
|--|--------------|---------------|
| It's fun | 78.6% | 63.5% |
| I enjoy discovery and exploration | 50.9% | 44.5% |
| It's relaxing | 36.7% | 46.5% |
| I can participate in outdoor activities near my house | 33.8% | 30.0% |
| I like new experiences | 31.7% | 34.8% |
| It's a great way to get exercise | 29.8% | 35.9% |
| I get away from my usual routine | 28.1% | 40.9% |
| I can spend time with friends | 26.2% | 31.5% |
| I want to be healthy | 23.9% | 24.7% |
| I like challenges | 23.2% | 34.2% |
| I get a feeling of accomplishment | 15.8% | 18.1% |
| Some other reason not listed | 15.7% | 8.2% |

Based on 2008 data.

What Keeps Youth Fishing Participants from Getting Outdoors More Often?

| "What keeps you from participating in outdoor activities more often?" | Ages 6 to 12 | Ages 13 to 17 |
|---|--------------|---------------|
| I don't have the time | 23.4% | 39.6% |
| I'm involved in other activities such as team sports and fitness activities | 21.0% | 17.8% |
| I have too much schoolwork | 20.0% | 33.7% |
| I would rather spend free time with TV/movies/computers/video games | 18.5% | 19.7% |
| There aren't places to do outdoor activities near where I live | 17.4% | 13.5% |
| I'm not interested | 16.3% | 20.4% |
| My parents don't take me to go on outdoor activities | 15.7% | 9.1% |
| I'd rather spend time with my friends in other activities | 11.2% | 23.7% |
| I don't know how to get started, what to do or where to go | 8.8% | 5.3% |
| I don't want to spend the money on gear or equipment | 7.9% | 11.8% |
| I don't have friends who would go with me | 6.1% | 11.4% |
| I'm worried I might get hurt | 4.9% | 1.8% |
| The outdoors are frightening | 3.2% | 0.6% |
| I don't like bugs or dirt | 3.1% | 3.7% |
| I don't enjoy exercise | 3.0% | 4.6% |
| I'm not in physical shape | 1.1% | 4.7% |

Based on 2008 data.

Crossover Participation, Youth Ages 6 to 17

What are the top outdoor, fitness, team/ball and other activities and sports enjoyed by fishing participants ages 6 to 17?

Outdoor Activities

1. Road/Paved Surface Bicycling **44.9%**
2. Car or Backyard Camping **39.8%**
3. Road/Paved Surface Running **26.5%**
4. Hiking **20.4%**
5. RV Camping **18.5%**

Team Sports

1. Basketball **28.1%**
2. Baseball **25.3%**
3. Football **24.1%**
4. Soccer **23.7%**
5. Volleyball **11.1%**

Indoor Fitness Activities

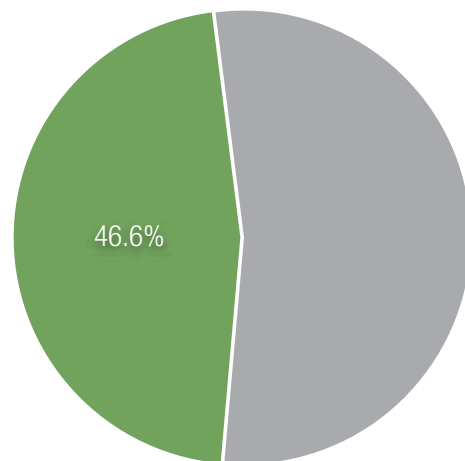
1. Free Weights **18.1%**
2. Stretching **10.6%**
3. Weight/Resistance Machines **10.3%**
4. Treadmill **8.5%**
5. Home Gym Exercise **7.8%**

Other Activities

1. Bowling **42.7%**
2. Fitness Walking **23.7%**
3. Skateboarding **19.4%**
4. Billiards **19.0%**
5. Shooting and Target Shooting **15.5%**

Crossover Participation in Boating, Youth Ages 6 to 17

46.6% of youth fishing participants, ages 6 to 17, participated in boating in 2009



Youth Fishing Participants,
Ages 6 to 17

HISPANICS

Currently the largest minority population in the United States, Hispanics are underrepresented in many outdoor activities, including fishing, accounting for only 5.6 percent of total participants. With 2.6 million participants, 13.6 percent of Hispanics over the age of 6 fish — more than 70 percent are male. In 2009, Hispanic fishing participants made more than 62 million annual outings in 2009. Nearly 50 percent have household incomes of less than \$50,000.

The most common participation barrier cited among Hispanics is lack of time, followed by a perceived lack of access to fishing areas and school work. Understanding the demographics, motivations and preferences of Hispanic participation is essential to successfully engaging this important group.

Total Participation

2007 2.1 million participants
16.1% of Hispanics age 6+

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

2008 2.4 million participants
13.7% of Hispanics age 6+

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

2009 2.6 million participants
13.6% of Hispanics age 6+

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

Youth

17.4% of Hispanics ages 6 to 12 participate in fishing, a higher percentage than any other age bracket

**\$25,000-
\$49,999**

The largest income bracket of Hispanic fishing participants

age **25-44**

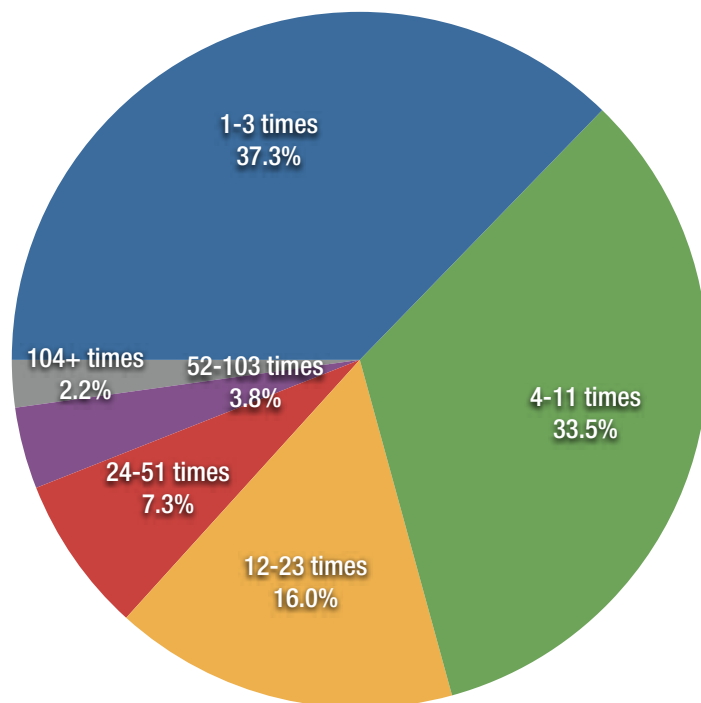
The largest age bracket of Hispanic fishing participants

Annual Outings

In 2009, Hispanic fishing participants made over 62 million annual outings — either close to home or on an overnight trip. Slightly more than one third of participants made between one outing per month and one outing per season.

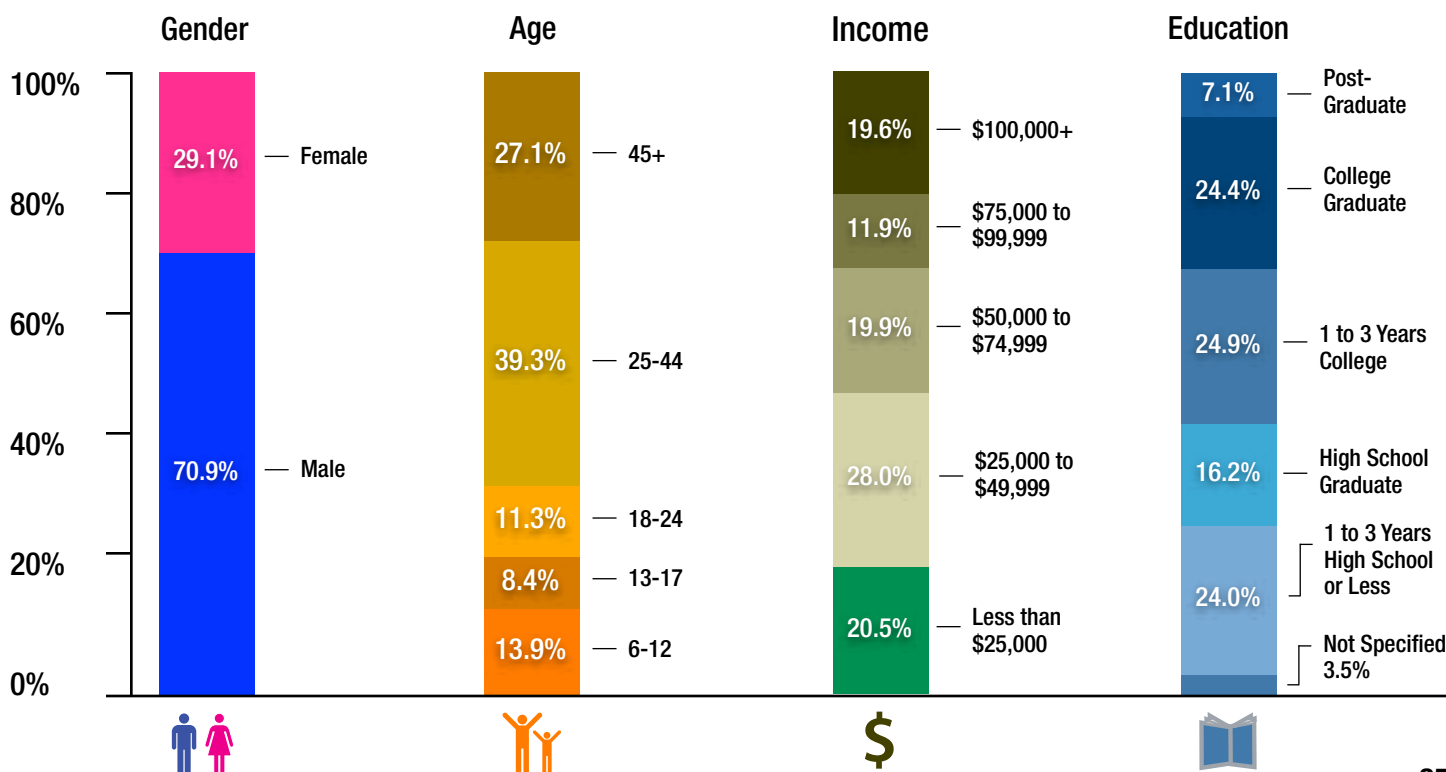
23.7 days

The average number of annual outings per Hispanic fishing participant



Annual Outings Among Hispanic Fishing Participants, Ages 6+

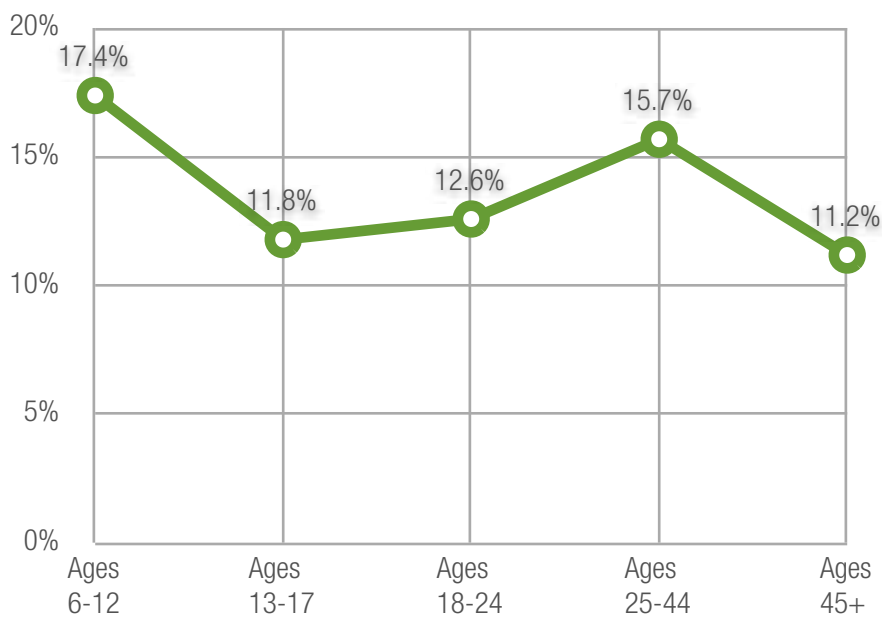
Demographics



Participation Life Cycle

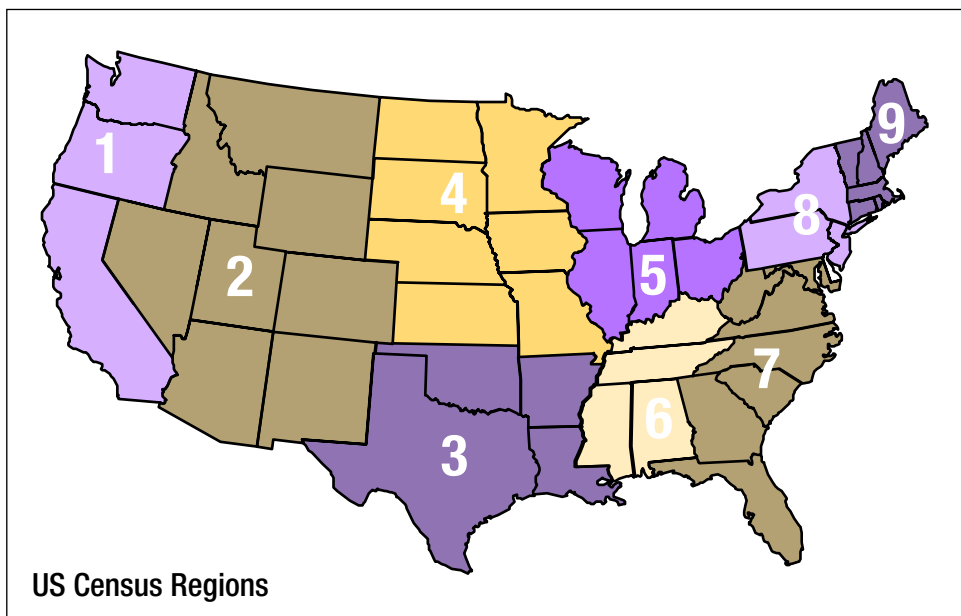
The participation rate among different age groups varies as individuals age and their lives are shaped by their environment and life experiences. A one-year snapshot of Hispanic fishing participation helps describe this life cycle of participation.

The Hispanic life cycle of fishing participation is very similar to those of other outdoor activities. Although youth participation is initially high, it declines sharply in adolescence, recovering some among young adults ages 25 to 44.



Geography of Participants

1. Pacific: **18.7%**
2. Mountain: **13.0%**
3. West South Central: **17.1%**
4. West North Central: **3.5%**
5. East North Central: **11.5%**
6. East South Central: **1.6%**
7. South Atlantic: **26.5%**
8. Middle Atlantic: **7.3%**
9. New England: **0.9%**



What Do Hispanic Fishing Participants Enjoy about Outdoor Activities?

| "What motivated your decision to participate in outdoor activities?" | Ages 6 + |
|---|-----------------|
| It's relaxing | 63.4% |
| It's fun | 60.9% |
| It's a great way to get exercise | 47.6% |
| I get away from my usual routine | 46.2% |
| I enjoy discovery and exploration | 45.7% |
| I want to be healthy | 40.3% |
| I like new experiences | 33.3% |
| I like challenges | 29.4% |
| I can spend time with friends | 29.3% |
| I can participate in outdoor activities near my house | 25.4% |
| I get a feeling of accomplishment | 19.4% |
| Some other reason not listed | 13.4% |

Based on 2008 data.

Who Introduces Hispanic Fishing Participants to Outdoor Activities?

| "Who influenced your decision to participate in outdoor activities?" | Ages 6 + |
|---|-----------------|
| Friends | 46.1% |
| Parents | 44.8% |
| Brothers, sisters, or other relatives | 39.1% |
| Myself (no one else influenced me) | 23.4% |
| Community program (Boy Scouts, YMCA, neighborhood program) | 10.6% |
| School program | 8.5% |
| Something else not listed | 5.8% |
| TV programs, movies, magazines, books, web sites about the outdoors | 4.5% |
| Media icon, sports figure, accomplished athlete | 4.0% |
| Experienced mentor (trained and skilled) | 3.4% |
| Outdoor education program such as Outward Bound | 0.8% |

Based on 2008 data.

What Keeps Hispanic Fishing Participants from Getting Outdoors More Often?

| "What keeps you from participating in outdoor activities more often?" | | Ages 6+ |
|---|--|---------|
| I don't have the time | | 53.3% |
| There aren't places to participate in outdoor activities near where I live | | 17.0% |
| I have too much work/schoolwork | | 14.1% |
| I would rather spend free time with TV/movies/computers/video games | | 14.1% |
| I don't know how to get started, what to do or where to go | | 11.4% |
| I don't want to spend the money on gear or equipment | | 11.1% |
| I'm not interested | | 11.0% |
| I'm not in physical shape | | 9.8% |
| I'm involved in other activities such as team sports and fitness activities | | 7.6% |
| I'm worried I might get hurt | | 6.6% |
| The outdoors are frightening | | 5.7% |
| I don't have friends who would go with me | | 5.7% |
| I'd rather spend time with friends in other activities | | 5.7% |
| I don't enjoy exercise | | 2.7% |
| I don't like bugs or dirt | | 2.3% |

Based on 2008 data.

Crossover Participation, Hispanics Ages 6+

What are the top outdoor, fitness, team/ball and other activities and sports enjoyed by Hispanic fishing participants ages 6 and older?

Outdoor Activities

1. Car or Backyard Camping **33.7%**
2. Road/Paved Surface Bicycling **29.5%**
3. Road/Paved Surface Running **27.5%**
4. Hiking **22.7%**
5. RV Camping **21.7%**

Team Sports

1. Basketball **23.4%**
2. Football **21.7%**
3. Soccer **17.9%**
4. Volleyball **16.1%**
5. Baseball **14.2%**

Indoor Fitness Activities

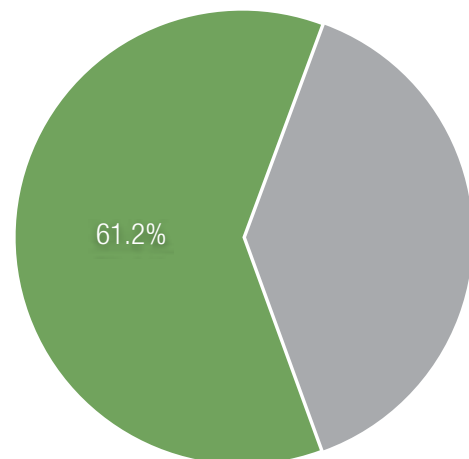
1. Free Weights **38.6%**
2. Weight/Resistance Machines **22.6%**
3. Treadmill **22.4%**
4. Stationary Cycling **21.2%**
5. Aerobics **20.7%**

Other Activities

1. Fitness Walking **46.6%**
2. Bowling **34.0%**
3. Billiards **29.8%**
4. Golf **22.5%**
5. Shooting or Target Shooting **21.1%**

Crossover Participation in Boating, Hispanics Ages 6+

61.2% of Hispanic fishing participants, ages 6+, participated in boating in 2009



Hispanic Fishing Participants,
Ages 6+

BOAT OWNERSHIP

Boating is an integral part of the fishing experience for many enthusiasts. More than 7 percent of all Americans over age 16 — approximately 20.5 million — own a boat, and an additional 9.6 million enthusiasts are considering ownership.

7.9 percent of males versus 6.6 percent of females own a boat. Bass boats are the most popular boat type at 18.6 percent, followed by deck/pontoon at 14.5 percent, closely followed by kayak/canoe at 13.6 percent and cruisers at 12.4 percent.

The majority of owners (78.5 percent) own only one boat. Nearly 50 percent of boaters purchased their boat new, and, of those, 87.2 percent purchased from dealerships. Those buying used boats sourced them primarily from friends and newspaper ads. Only 3.8 percent of potential first-time owners, but 15.9 percent of previous owners are considering boat ownership. Cost, time and storage concerns were the top reasons for no longer owning a boat.

Ownership Rates

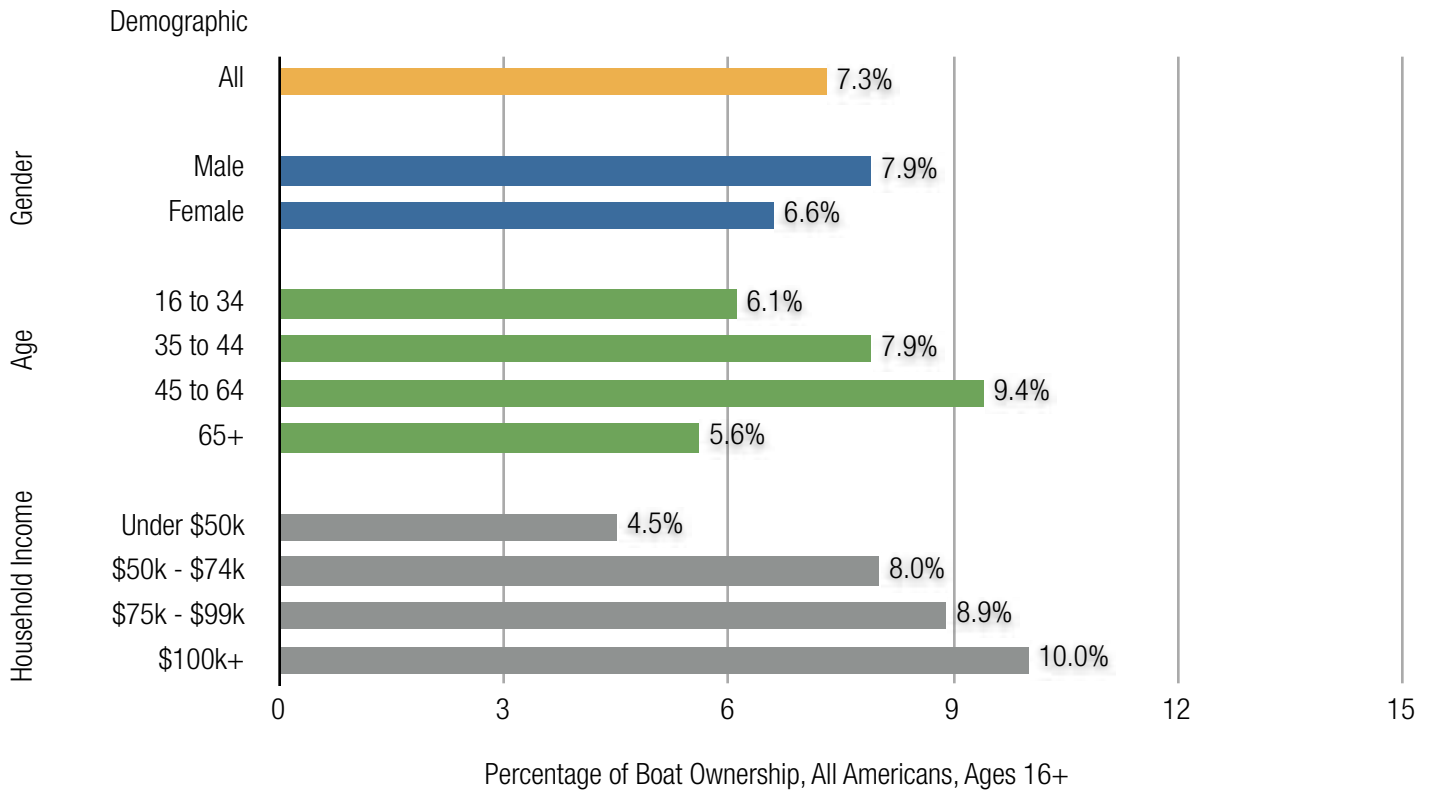
7.3%

Percentage of Americans ages 16 and older who own a boat (20.5 million Americans)

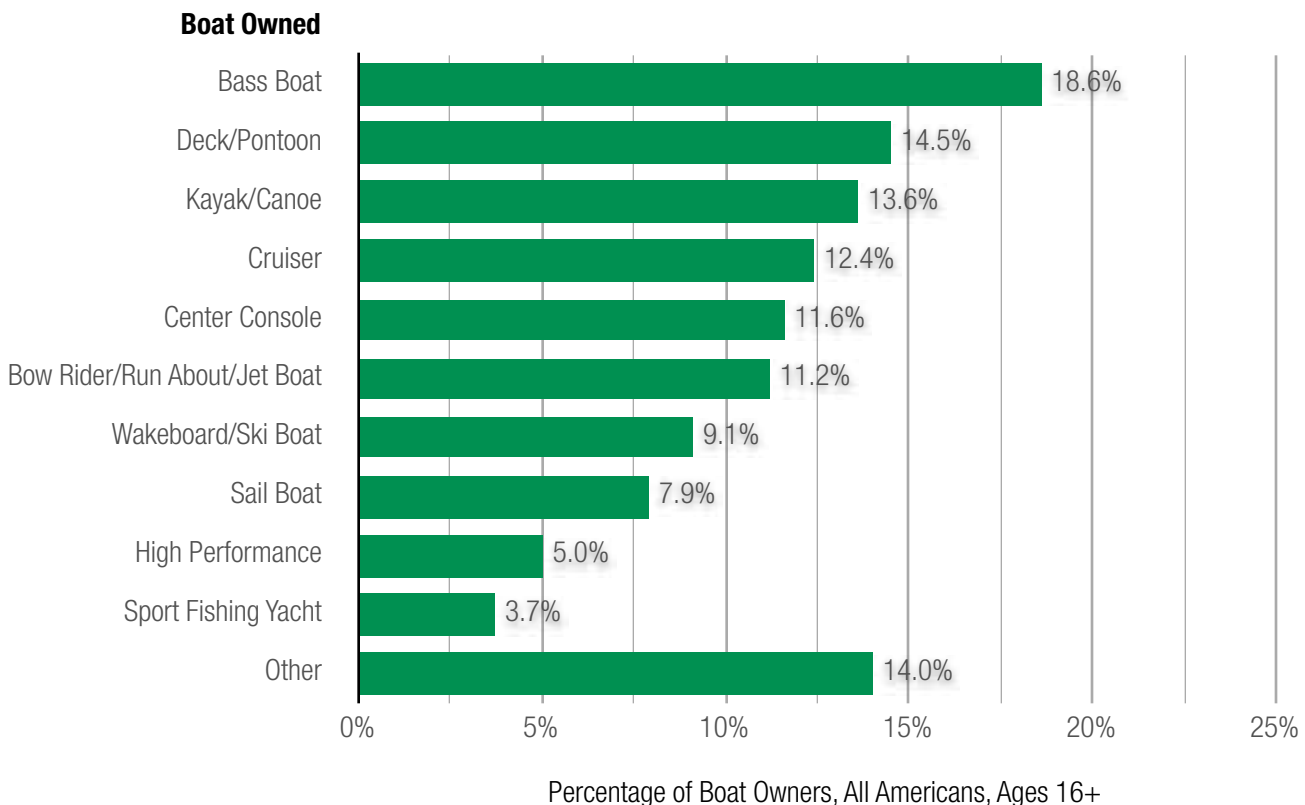
3.4%

The estimated percentage of Americans ages 16 and older who don't own a boat but are considering ownership (9.6 million Americans)

Boat Ownership Rate by Demographic

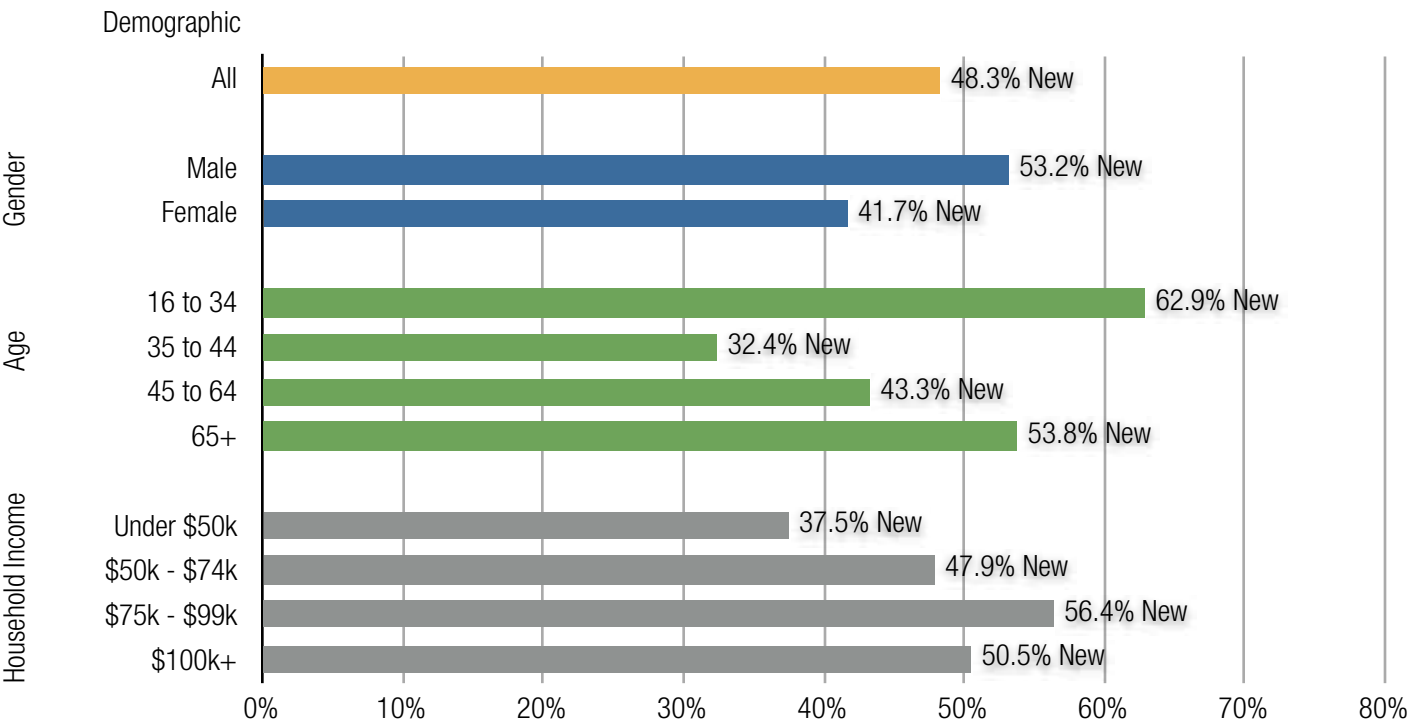


Boat Ownership by Boat Type



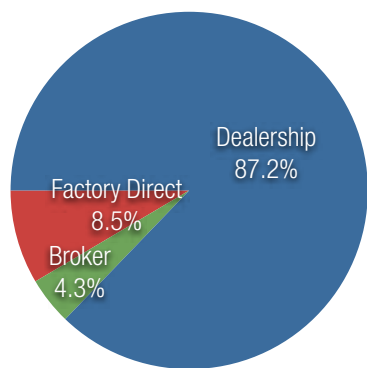
New and Used Boat Ownership

Was your primary boat purchased new?

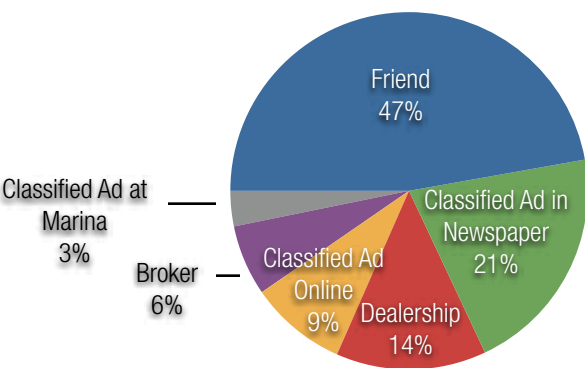


Percent of Boat Owners Whose Primary Boat was Purchased New, All Americans, Ages 16+

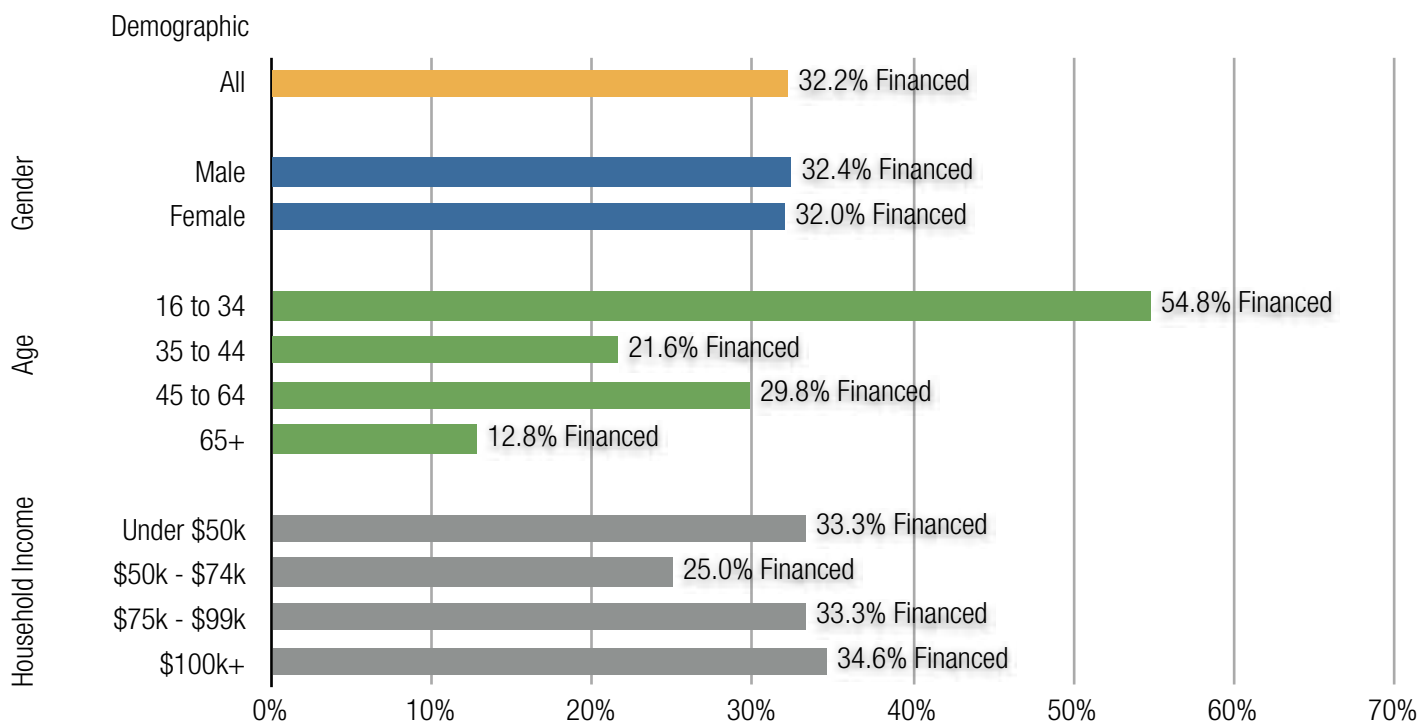
Where did you buy your new boat?



Where did you buy your used boat?

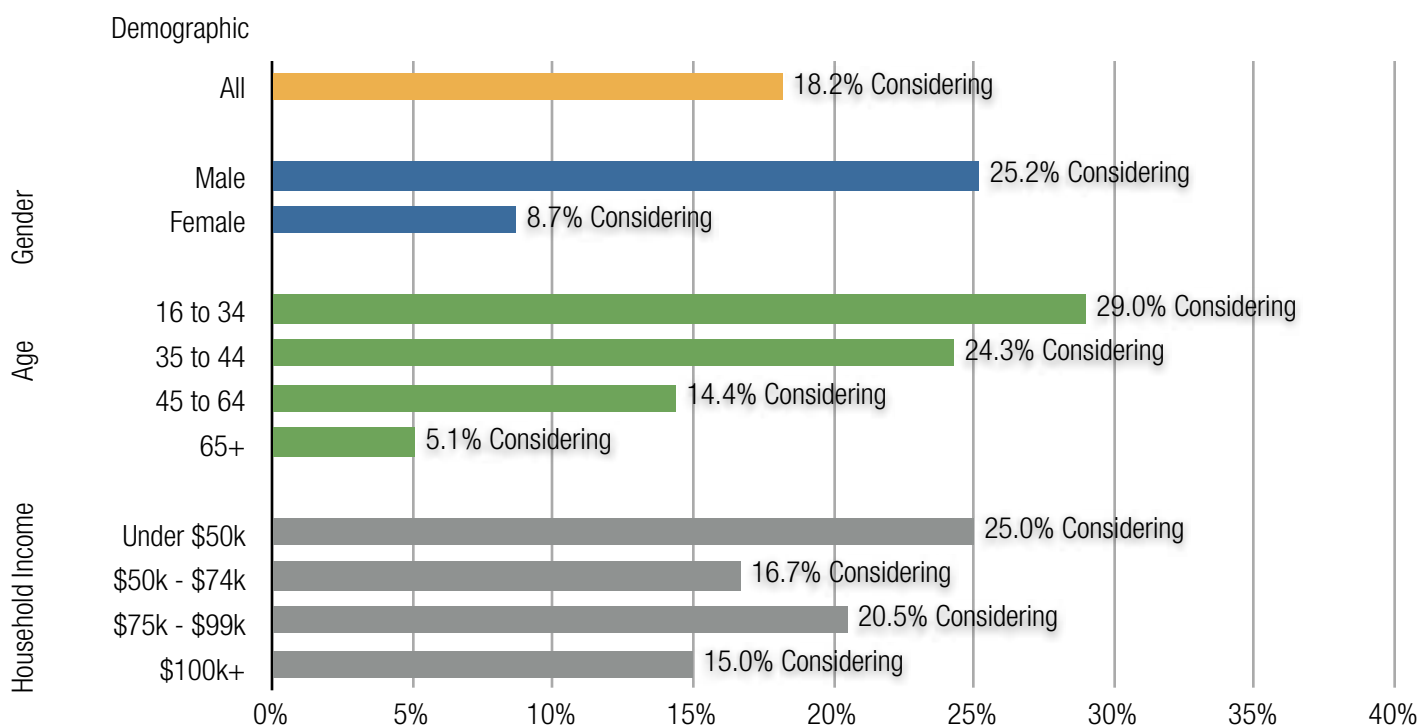


Did you finance your boat purchase?



Percent of Boat Owners Who Financed their Primary Boat Purchased, All Americans, Ages 16+

Are you considering repowering your primary boat in the next year?



Percent of Boat Owners Considering Repowering their Primary Boat, All Americans, Ages 16+

Where is your boat stored in season?

Boat Owners, All Americans, Ages 16+

| | |
|--|-------|
| On a trailer at my primary residence | 55.4% |
| On a trailer at a storage facility/marina | 10.7% |
| In the water at a private dock at my primary residence | 13.6% |
| In the water at a private dock at a secondary residence less than one hour from my primary residence | 8.3% |
| In the water at a private dock at a secondary residence one to three hours from my primary residence | 5.8% |
| In the water at a private dock at a secondary residence over 3 hours from my primary residence | 4.1% |
| In the water at a marina less than one hour from my primary residence | 9.1% |
| In the water at a marina one to three hours from my primary residence | 2.5% |
| In the water at a marina over 3 hours from my primary residence | 1.7% |
| Somewhere else | 9.9% |

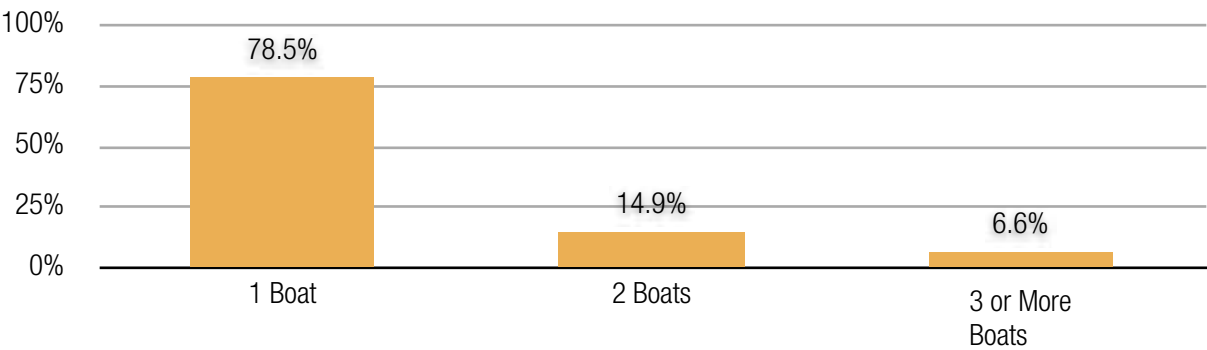
How much money did you spend on boating, including fuel, finance payments, accessories, maintenance, repair and upgrades in 2009?

Boat Owners, All Americans, Ages 16+

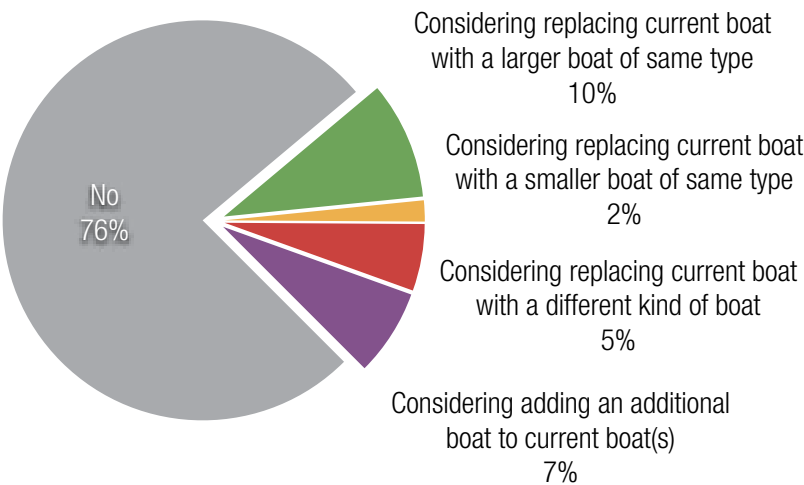
| | |
|--------------------|-------|
| Under \$500 | 40.5% |
| \$500 to \$999 | 15.3% |
| \$1,000 to \$1,999 | 14.5% |
| \$2,000 to \$4,999 | 15.7% |
| Over \$5,000 | 14.0% |

Expanding Fleets

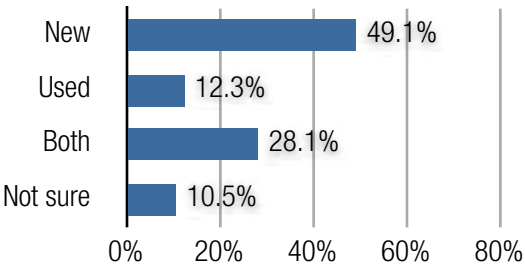
How many boats do you own?



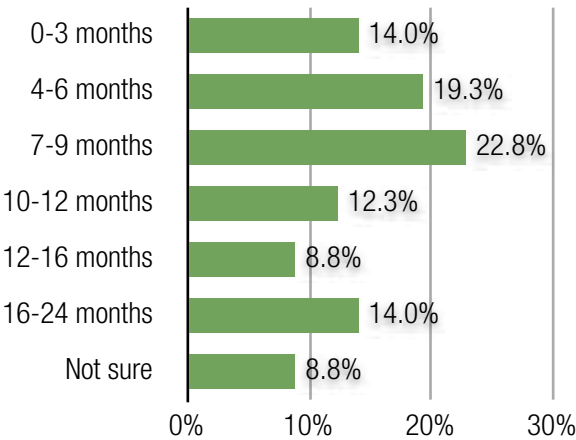
Are you considering another boat?



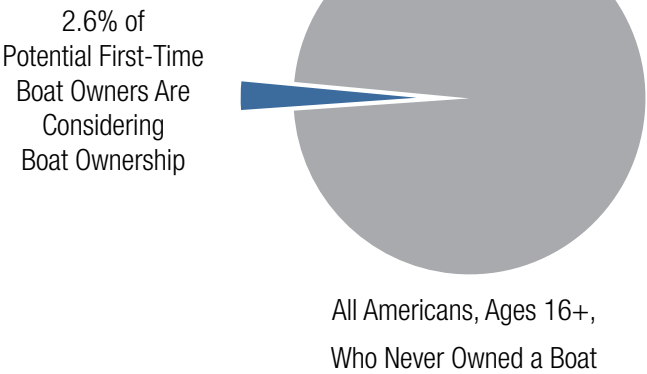
Are you considering a new or used boat?



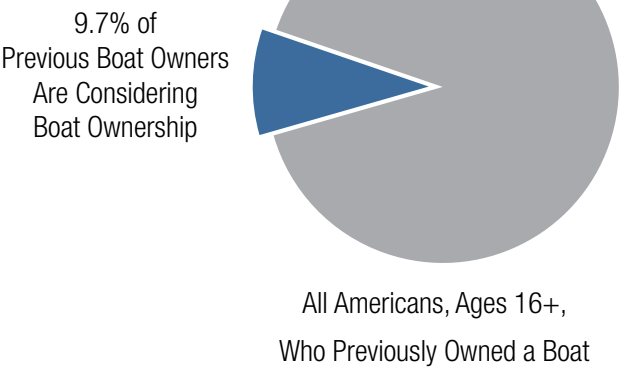
How soon are you considering making your purchase?



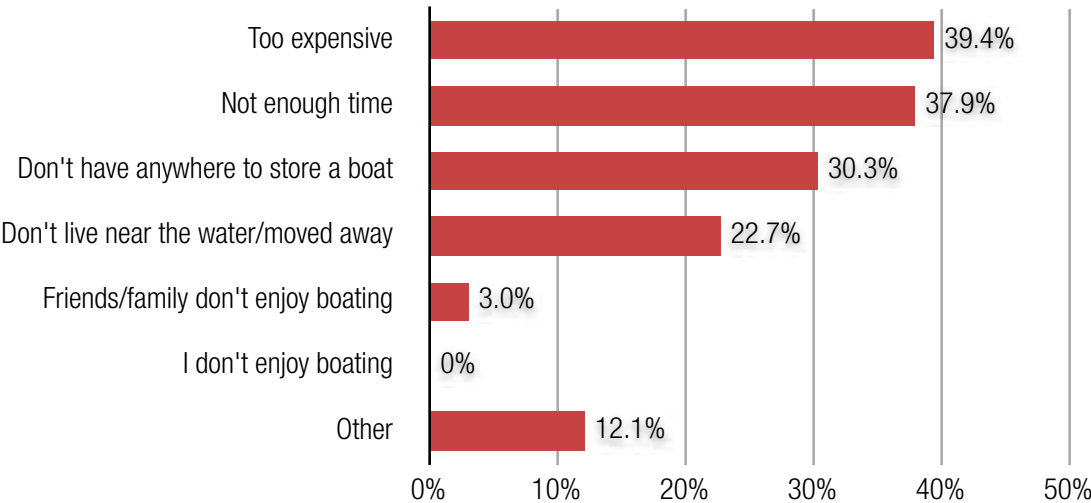
Considering Boat Ownership for the First Time



Previous Boat Owners Considering Boat Ownership



Why do you no longer own a boat?





BOATING PARTICIPATION

In 2009, more than 50 million participants or 17.9 percent of Americans age 16 and older went boating. This enthusiasm for boating resulted in a total of 705 million boating days in 2009, with 21 average annual days spent on the water.

While many Americans currently own a boat, many also enjoy boating without the commitment of ownership. Twenty-three percent of boating participants rented or chartered a boat while on vacation in 2009.

This section includes valuable insights on recreational boating participation among different demographics and boat types, including a look at the percentage of Americans who personally operated, sailed or rowed boats.

Boating Participation

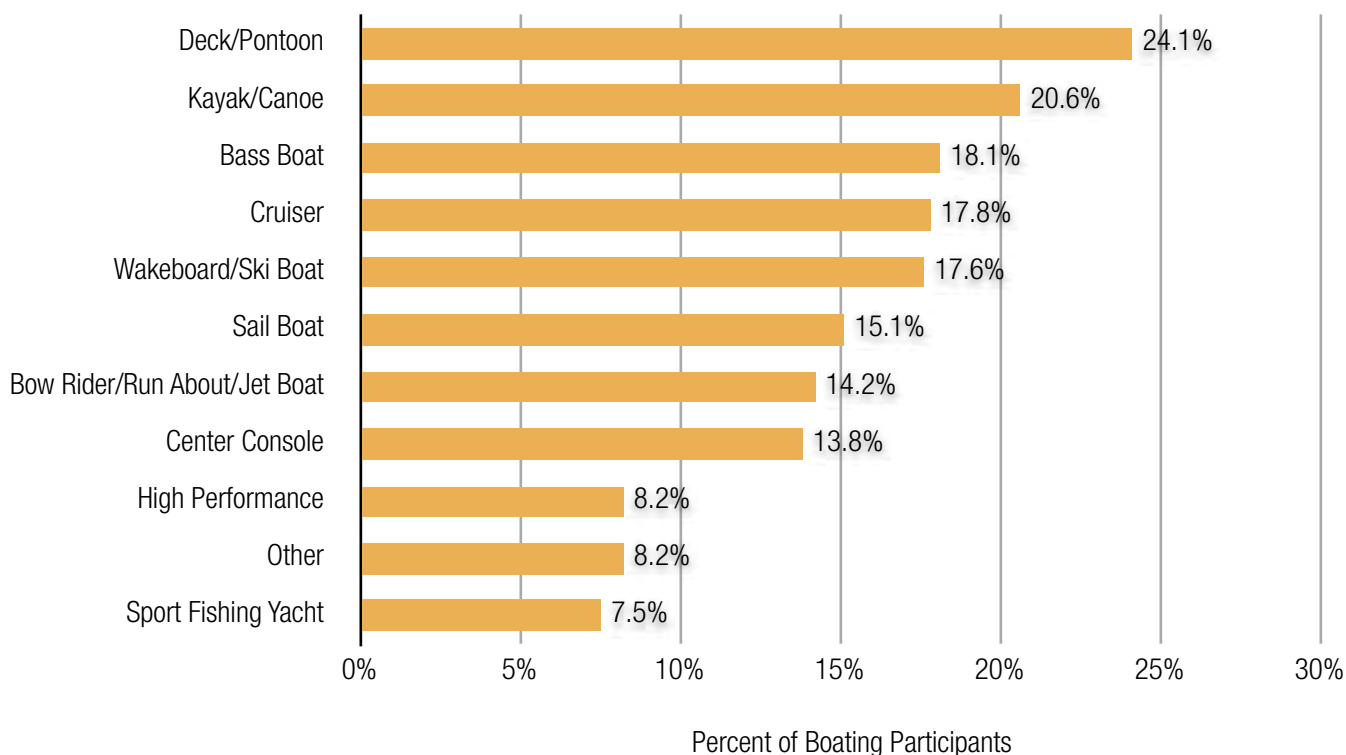
| | |
|--------------------|--|
| 17.9% | Percentage of Americans age 16 and older who went boating in 2009 (50.4 million participants) |
| 705 million | Projected number of boating outings made by Americans age 16 and older in 2009 |

16 days

The typical number of annual boating outings that boating participants make in sport fishing yachts.

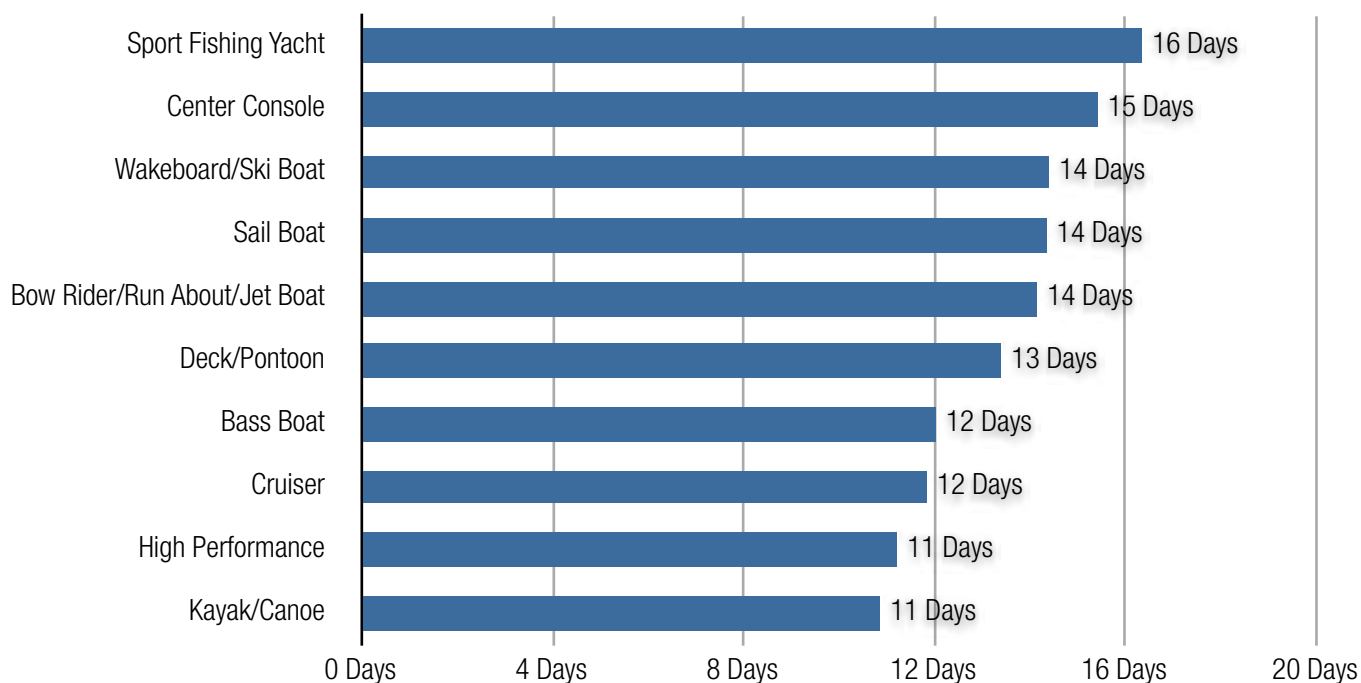
On What Type of Boat do Participants Go Out on the Water?

Ages 16 and Older



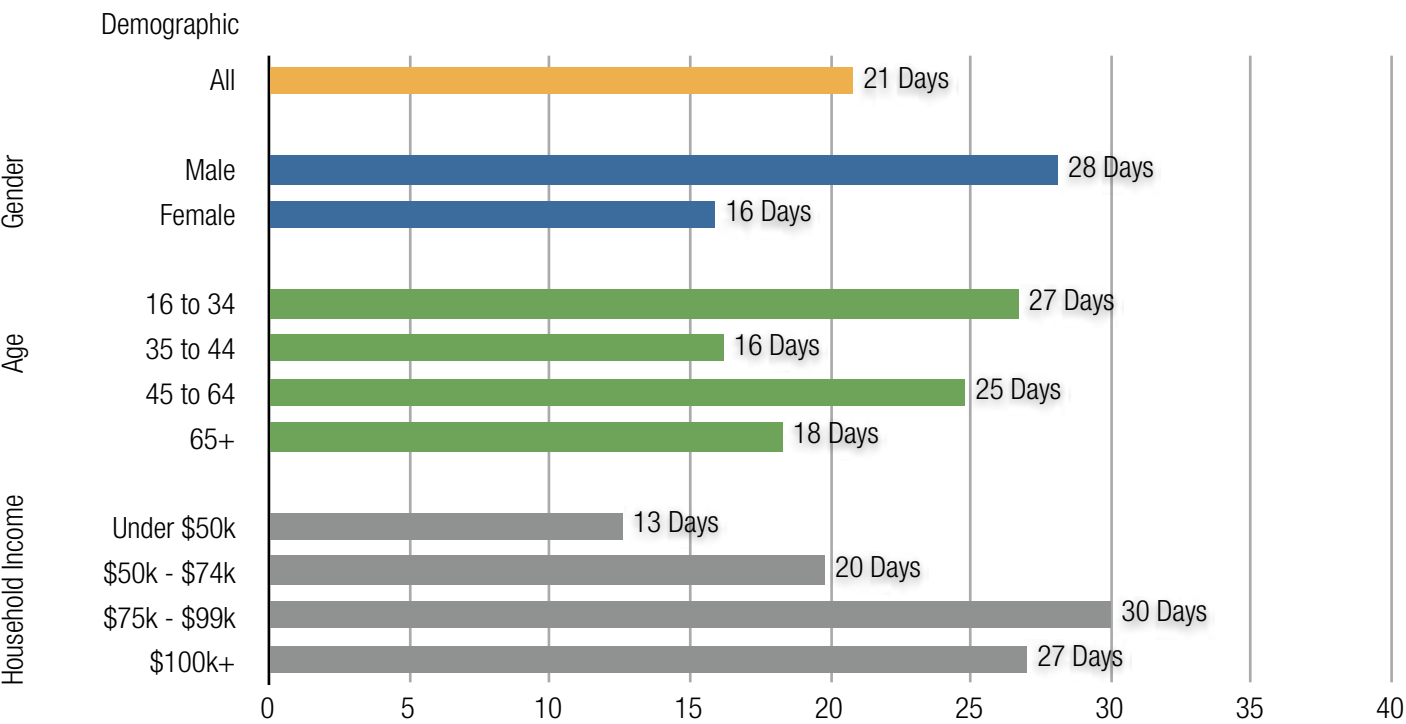
Average Annual Boating Days by Boat Type

Boating Participants, Ages 16 and Older



Average Number of Annual Boating Days by Demographic^{NOTE}

Among Boating Participants, Ages 16 and Older



NOTE: The **average number of boating days per boating participant** is calculated by summing each participant’s reported boating days 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

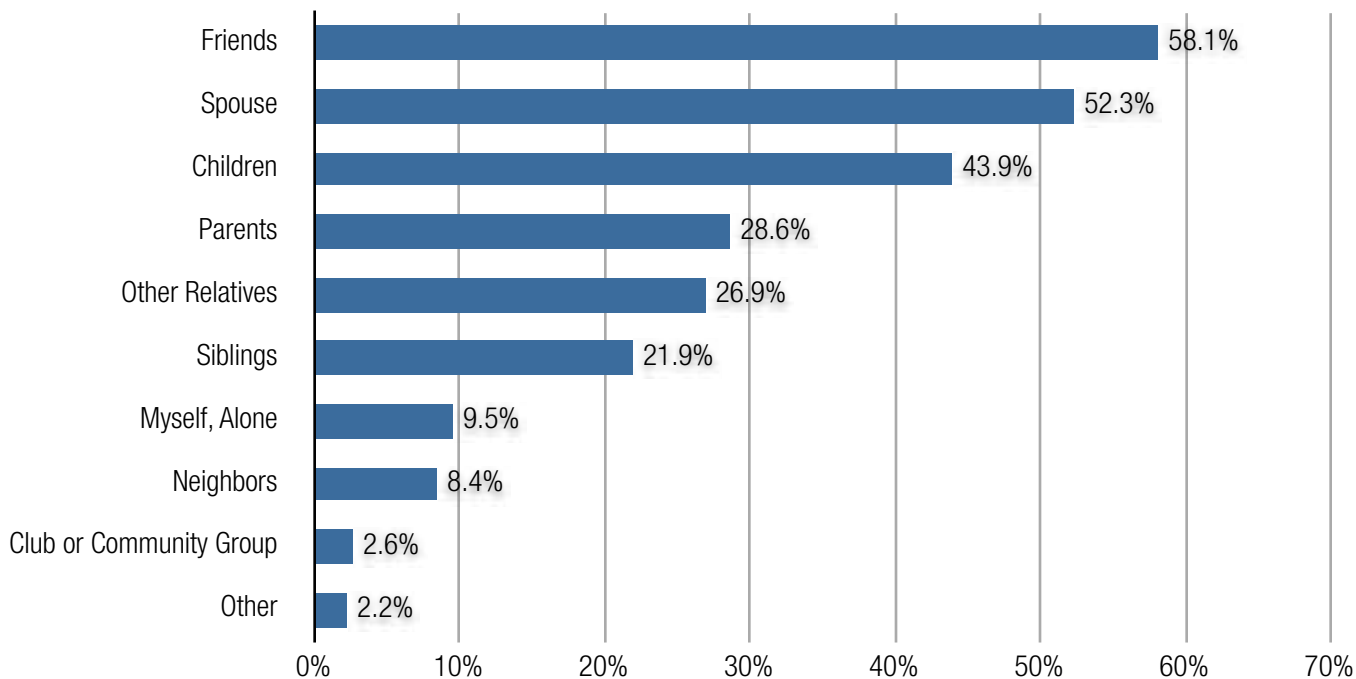
Ages 16 and Older

| | All | Males | Females |
|-------------------------------|-------|-------|---------|
| Kayak/Canoe | 96.9% | 98.2% | 94.9% |
| Bow Rider/Run Abouts/Jet Boat | 80.3% | 93.0% | 56.5% |
| Other | 68.4% | 76.0% | 53.8% |
| Wakeboard/Ski Boat | 63.4% | 69.8% | 51.7% |
| Center Console | 57.8% | 71.1% | 38.5% |
| Deck/Pontoon | 54.5% | 71.2% | 35.8% |
| Bass Boat | 53.6% | 70.6% | 27.3% |
| Cruiser | 53.0% | 61.8% | 35.7% |
| Sail Boat | 50.0% | 61.1% | 38.2% |
| High Performance | 47.4% | 51.7% | 33.3% |
| Sport Fishing Yacht | 40.0% | 43.5% | 33.3% |



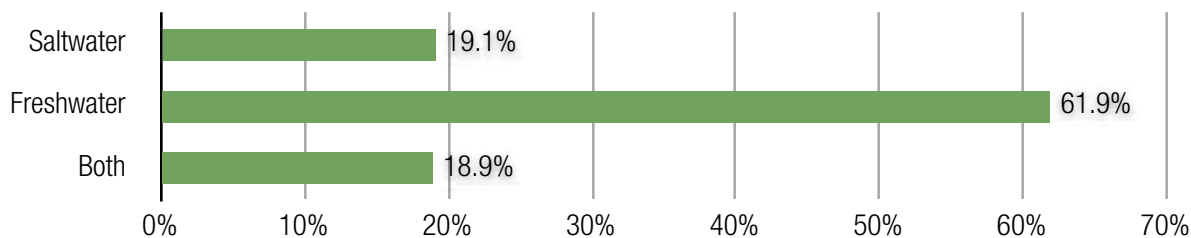
Boating Companions

Among Boating Participants, Ages 16 and Older



Boating Water Types

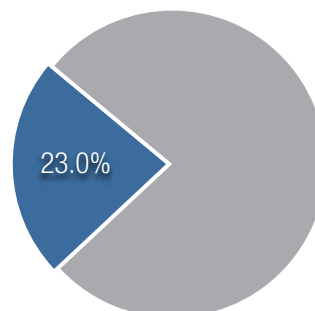
Among Boating Participants, Ages 16 and Older



Vacation Charters/Rentals

Among Boating Participants, Ages 16 and Older

23.0% of boating participants rented or chartered a boat while on vacation in 2009





BOATING ACTIVITIES

Boating participants do not limit their recreation to fishing while out on the water. More than 60 percent of boating participants over age 16 went cruising in 2009. The average participation for males was 58 times per year and females 40 times per year.

Enthusiasts participate in a number of different activities from swimming to entertaining. Males, individuals with household incomes from \$75 - \$99K, seniors and individuals ages 45 to 64 are especially active, participating in all boating activities more frequently than other demographics.

After cruising, fishing from a boat is the second most popular boating activity. Among the boating activities with the highest number of annual activity days per participant are whitewater paddling, hunting, scuba diving, snorkeling and quiet water paddling.

In all, the variety of activities enjoyed while boating reveals the depth of the connection boating participants have with the water.

60 percent

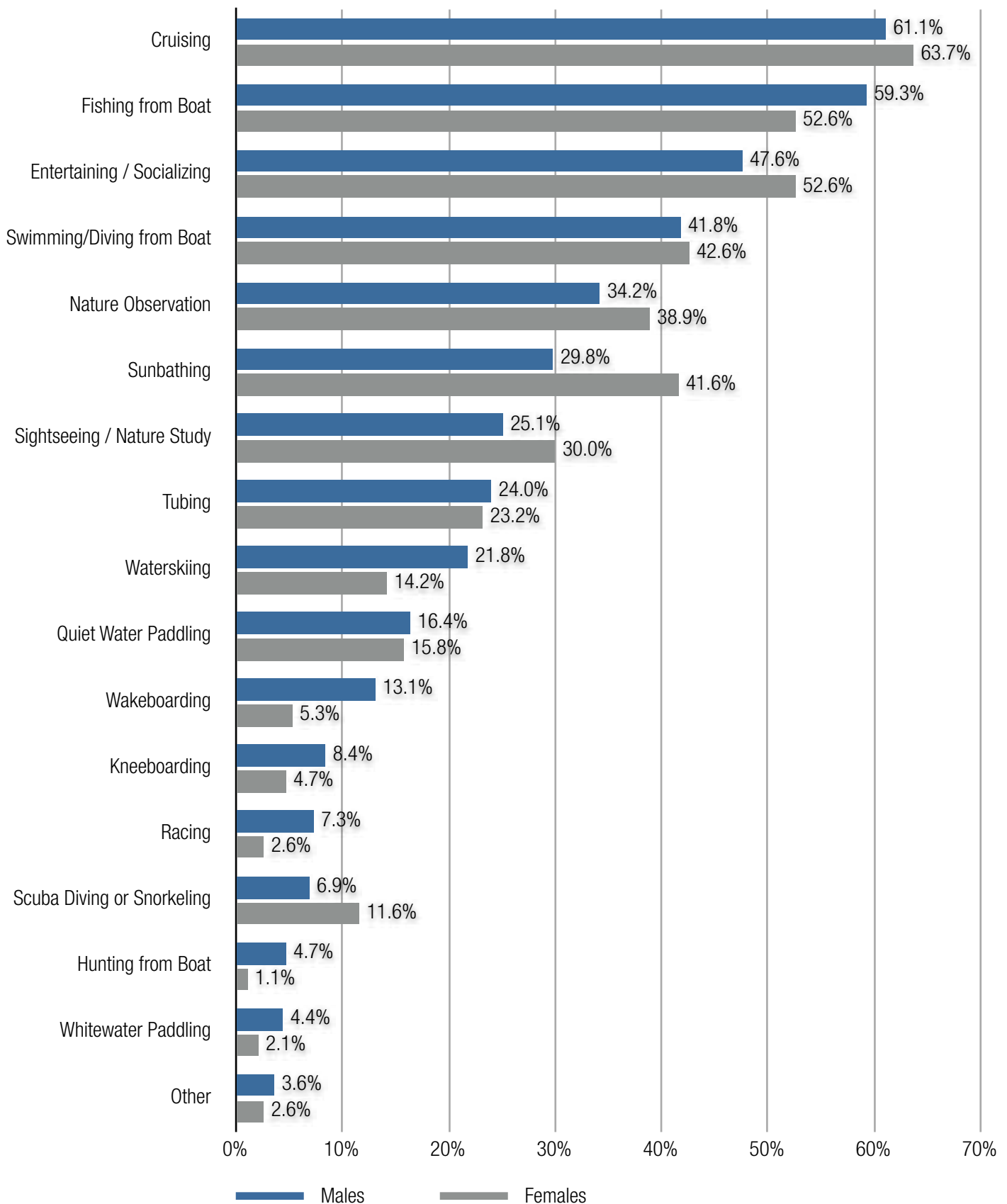
More than 60 percent of male and female boating participants went cruising in 2009

Fishing

After cruising, fishing from a boat is the second most popular boating activity

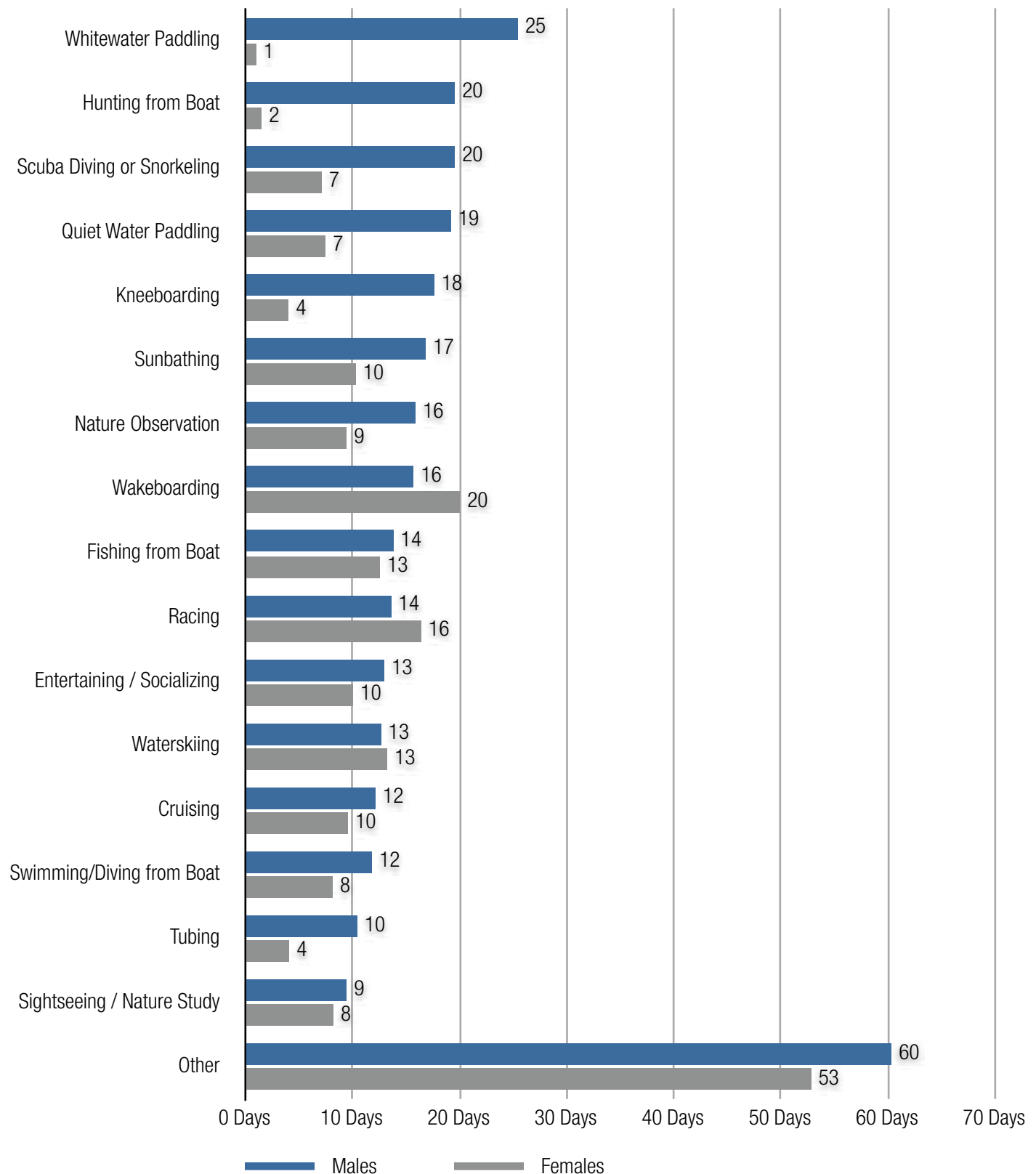
Participation in Boating Activities

Among Boating Participants, Ages 16 and Older



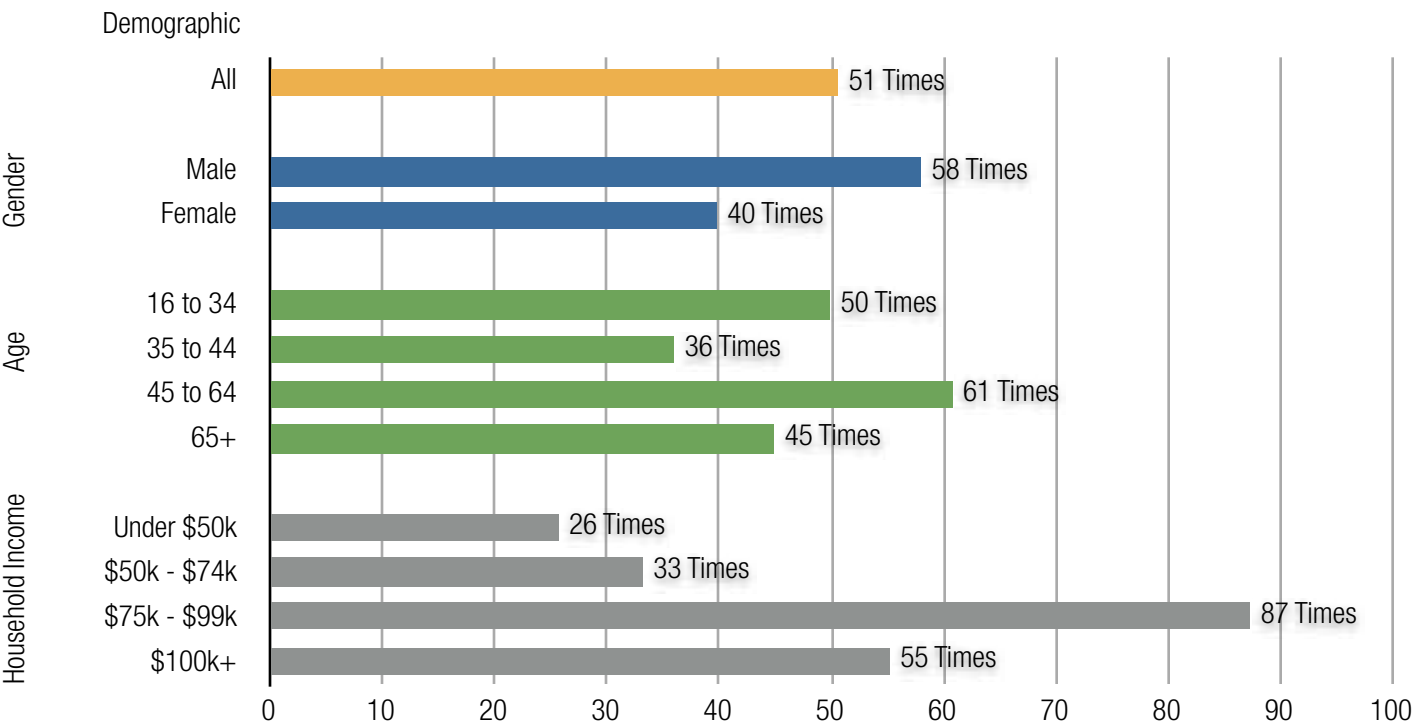
Average Number of Annual Boating Activity Days

Among Boating Participants, Ages 16 and Older



Average Annual Participation in Boating Activities by Demographic^{NOTE}

Among Boating Participants, Ages 16 and Older





A Partnership Project of:

