

SPECIAL REPORT ON FISHING AND BOATING

2011



A Partnership
Project of:



RECREATIONAL
BOATING & FISHING
FOUNDATION



OUTDOOR
FOUNDATION®

Methodology

During January and February 2011, a total of 38,742 online interviews were carried out with a nationwide sample of individuals and households from the U.S. Online Panel operated by Synovate. A total of 15,086 individual and 23,656 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 under-responding groups.

A weighting technique was used to balance the data to reflect the total U.S. 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 283,743,000 people aged six and above. The report details participation among all Americans: youth, young adults and adults.

The 2011 participation survey sample size of 38,742 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 2011, a total of 502 respondents to the January and February 2011 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 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 2011 participation survey, which focused on American participation in the 2010 calendar year. 2006, 2007, 2008 and 2009 data noted in the report was collected in previous surveys.

TABLE OF CONTENTS

Methodology	2
Fishing.....	4
Freshwater Fishing.....	22
Saltwater Fishing.....	28
Fly Fishing.....	34
Youth, A Focused Look	40
Hispanics, A Focused Look	48
Boat Ownership	56
Boating Participation.....	64
Boating Activities	70

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FISHING

More than 45.4 million Americans participated in fishing in 2010—16 percent of all Americans over age six. These enthusiasts took the nation's waterways by force, making 925 million fishing outings. On average, each fishing participant spent 20.4 days fishing last year.

Technology played a large role in helping fishing participants connect with the outdoors. A majority (53.4 percent) used a computer to search for information about outdoor recreation. More than 40 percent used mobile technologies or the internet to plan outdoor activities and more than 35 percent shared their outdoor experiences with technology as well.

Although fishing is still one of the most popular nature-based outdoor activities among Americans, overall fishing participation was down five percent in 2010. Understanding the demographics, motivations and barriers of fishing participants is critical for increasing participation rates and growing the sport. The following report provides a detailed look at existing fishing participants as well as those who don't participate in fishing but are interested in becoming active in the sport.

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+

South Atlantic

18.4% 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.

68.2% Males

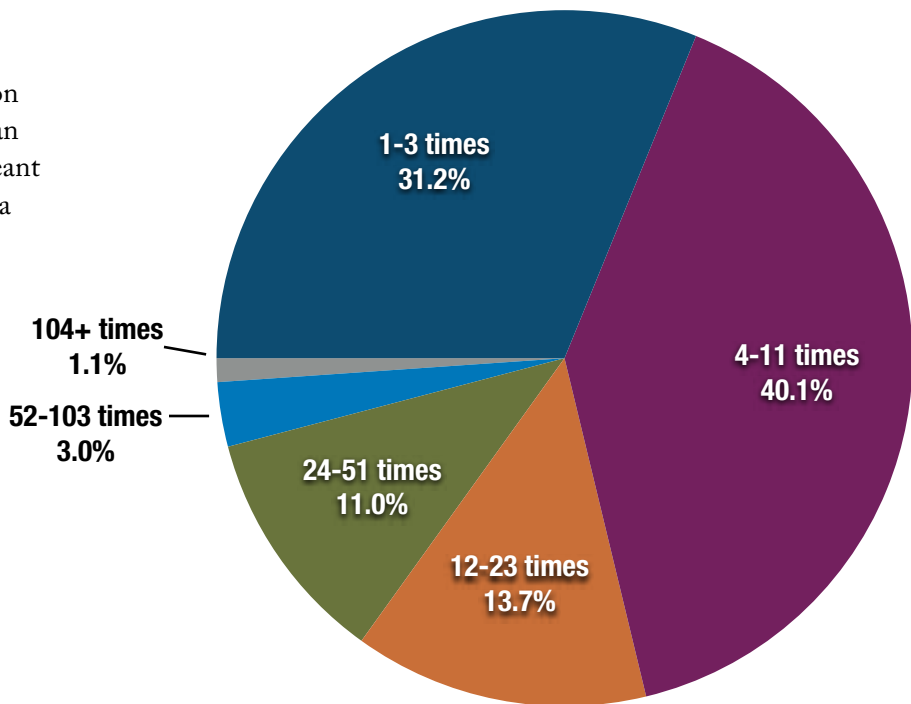
The majority of fishing participants are male.

Annual Outings

In 2010, fishing participants made 925 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.

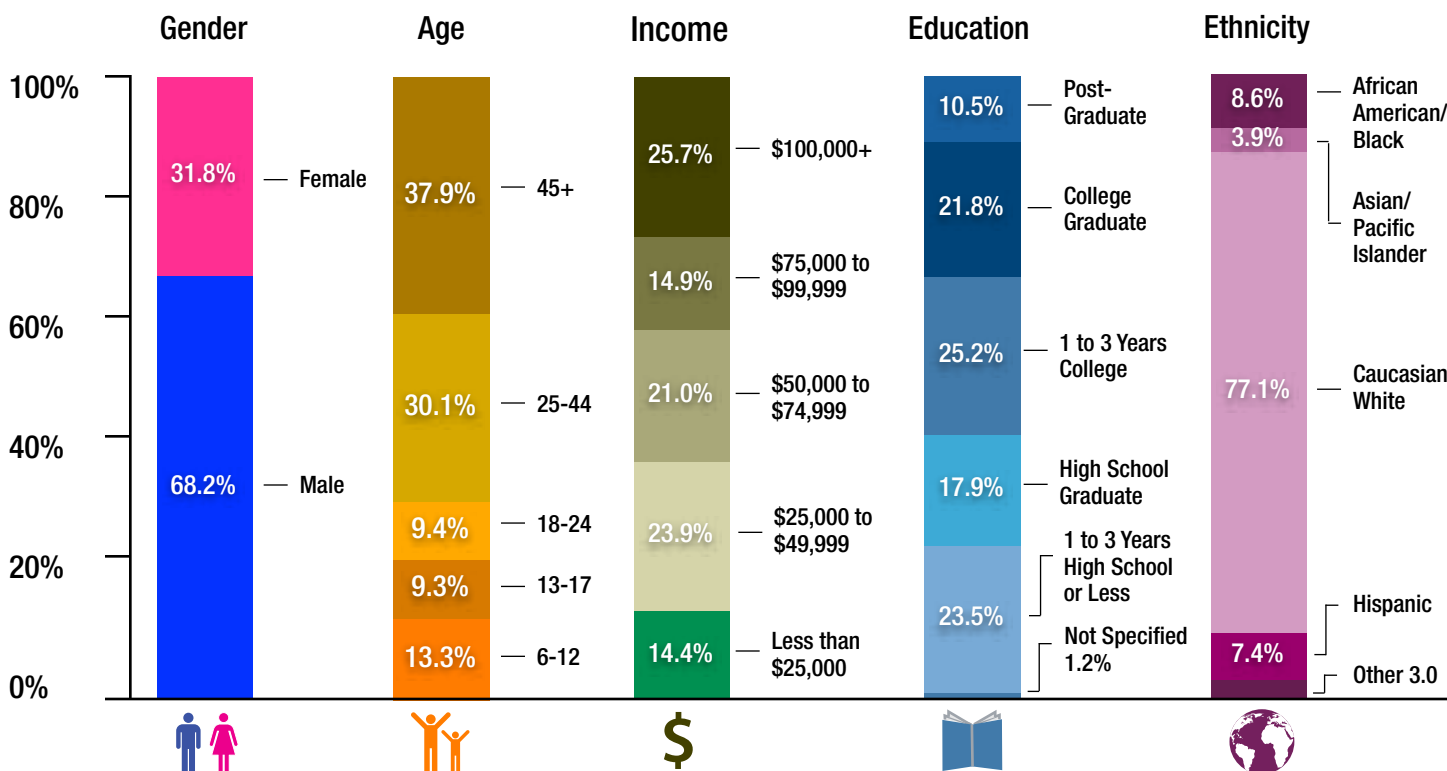
20.4 days

The average number of annual outings per fishing participant



Annual Outings Among Fishing Participants, Ages 6+

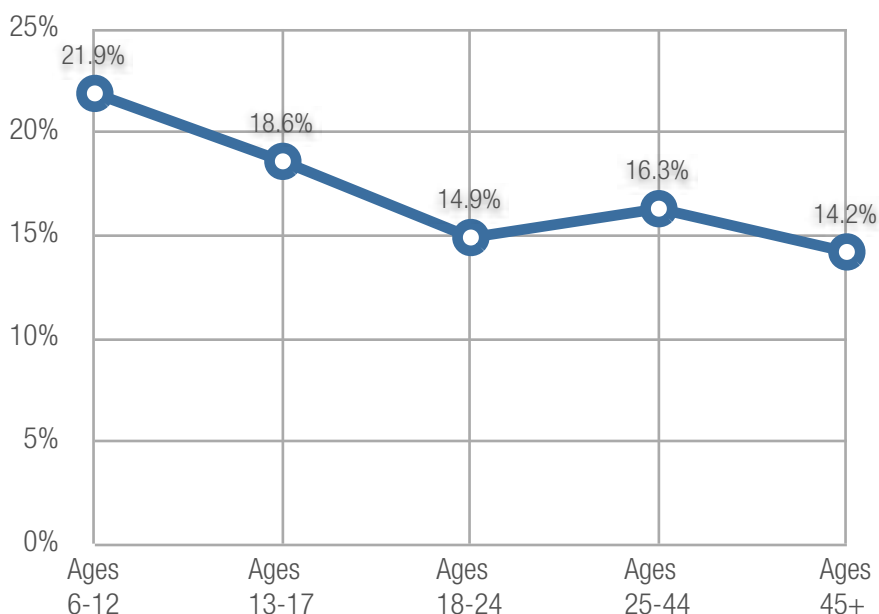
Demographics



Participation Life Cycle

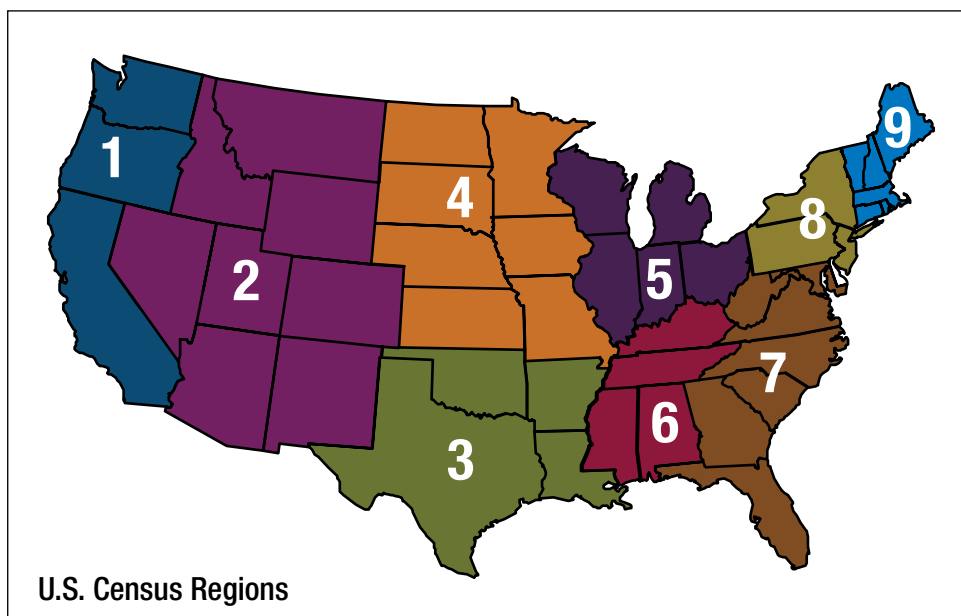
The participation rate among different age groups varies as individuals age and their lives are shaped by their environment and life experiences. A one-year snapshot of fishing participation helps describe this life cycle of participation.

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.



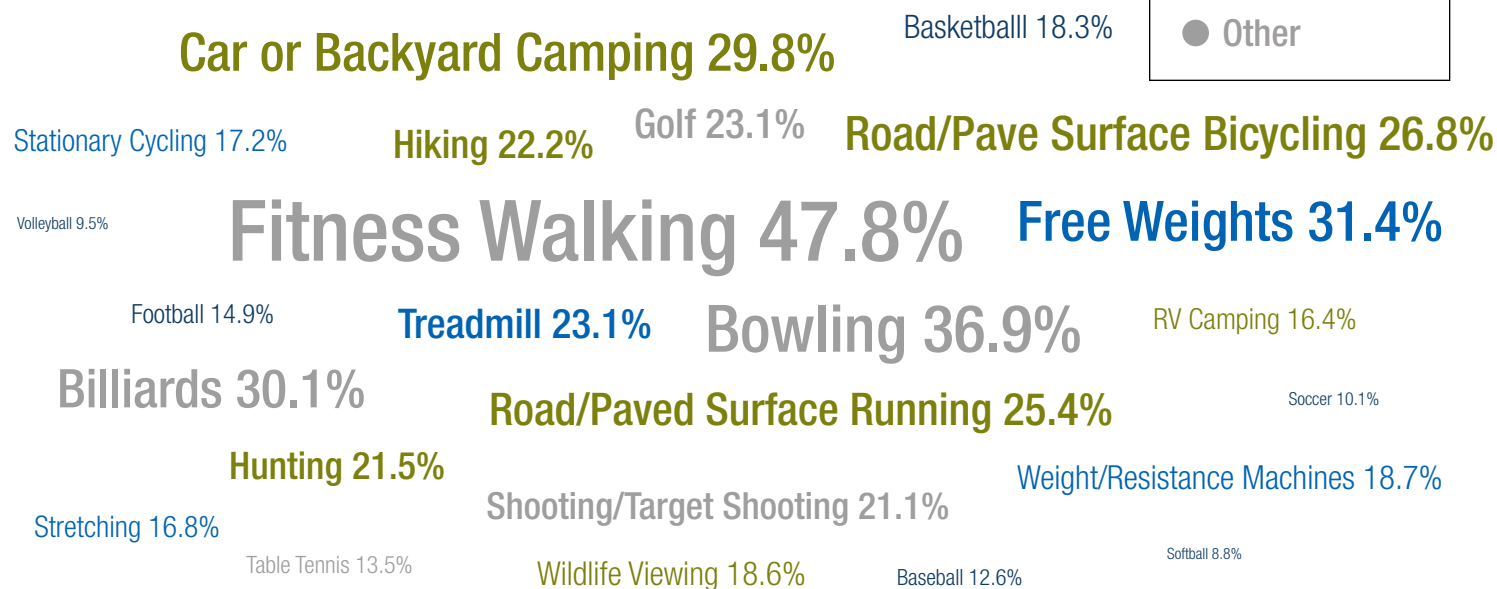
Geography of Participants

- 1. Pacific: 10.7%**
- 2. Mountain: 8.1%**
- 3. West South Central: 12.7%**
- 4. West North Central: 8.6%**
- 5. East North Central: 17.5%**
- 6. East South Central: 7.6%**
- 7. South Atlantic: 18.4%**
- 8. Middle Atlantic: 11.6%**
- 9. New England: 4.7%**



Crossover Participation

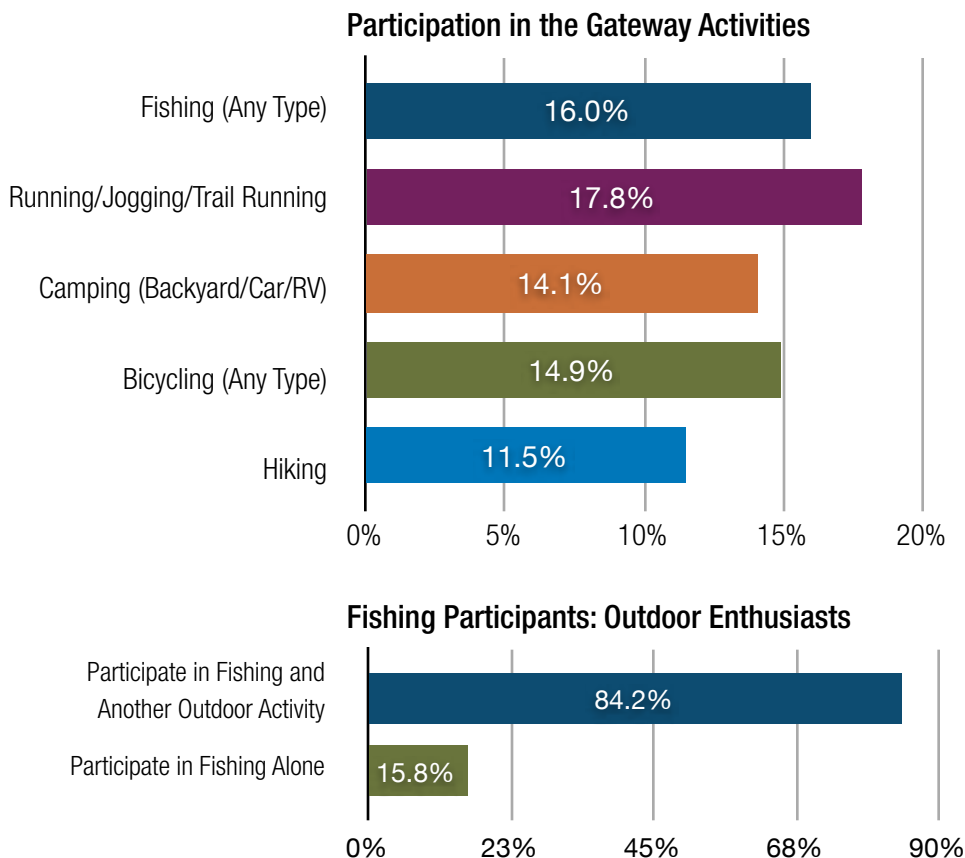
What are the top outdoor, indoor fitness, team and other activities enjoyed by fishing participants?



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. Running/jogging/trail running is the most popular of these important and influential activities, with fishing coming in a close second.

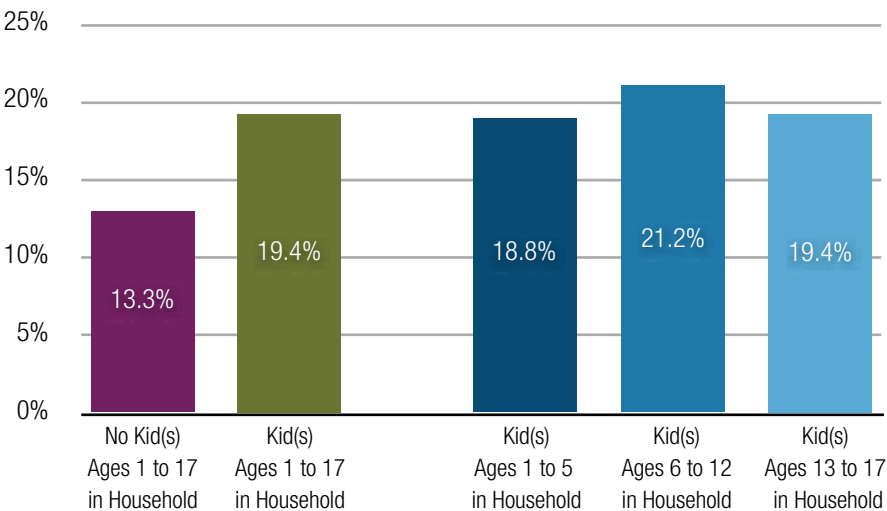
A majority—84.2 percent—of fishing participants participate in multiple outdoor activities. Only a small percentage participate in fishing alone.



Participation in Fishing Among Adults with Children

Adults 18 and older with children in their households 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.

More than 19 percent of adults (ages 18 and older) with children ages 1 to 17 in their households participate in fishing, while only 13.3 percent of adults without children in their households participate.



Perceptions of Conservation Among Fishing Participants

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

Based on 2009 data.

Top Fishing Venues

	Ages 6+
Boat	52.3%
Shoreline	50.8%
River Bank	41.1%
Pier/Jetty	26.6%
Kayak	2.3%
Other	6.4%



What Keeps Fishing Participants from Enjoying Outdoor Activities More Often?

Ages 6+

Too hot/cold/too poor weather	31.4%
Not enough vacation time	30.2%
Time spent at work instead	24.8%
Time spent with family instead	23.3%
Don't have the right gear	18.9%
No one to go with	16.7%
Other reason	15.4%
Time spent at school instead	14.0%
Time spent with friends instead	12.6%
Prefer other activities/vacation options	12.1%
Hassle of setting up/cleaning up for activities	11.5%
Not healthy/fit enough	11.3%
Don't like bugs/animals	9.5%
Rather spend time watching TV/movies	9.2%
Concerned about vulnerability/security/safety	8.8%
Hassle of planning	8.0%
Concerned about getting injured	7.2%
Don't have transportation options	7.1%
Rather spend time online	6.2%
Nowhere nearby	5.9%
Lack of sleep	5.0%
Prefer indoor fitness activities	4.8%
Prefer team sports	4.5%
Concerned about sanitation issues/getting dirty	4.3%
Don't enjoy physical activities	2.2%

Fishing Participants' Use of Technology to Share and Enhance Outdoor Experiences

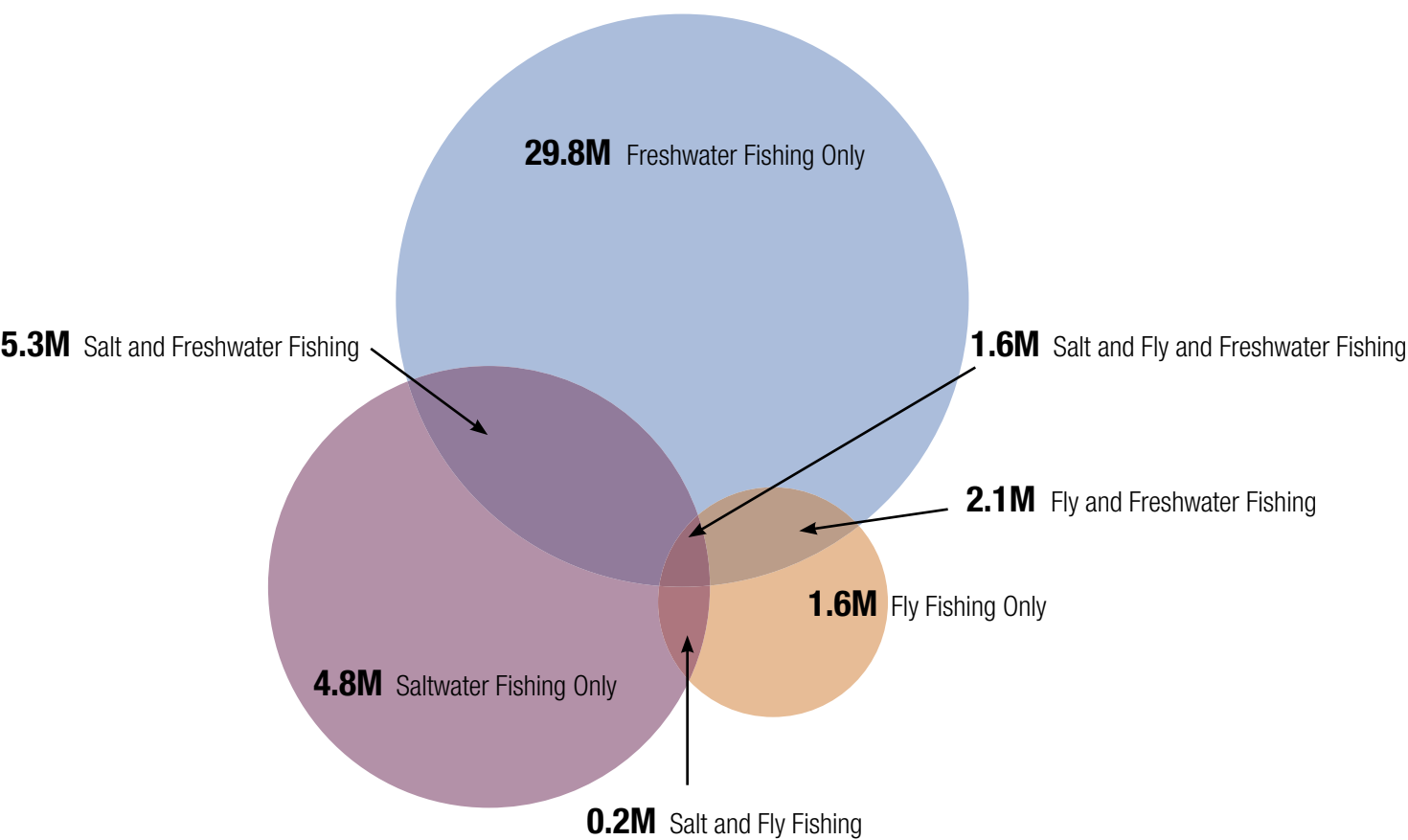
Ages 6+

I use a laptop/desktop computer to search for information about outdoor recreation activities/sites before/while/after outdoors.	53.4%
I use mobile technologies/home computers/internet to plan/organize outdoor activities.	44.4%
Mobile technologies/internet make it easier to participate in outdoor activities with friends/on my own.	40.8%
I like to share experiences in outdoor recreation with others through use of mobile technologies/internet.	36.9%
Mobile technologies take away from my enjoyment of outdoor activities.	33.5%
I use mobile technologies to search for information about outdoor recreation activities/sites before/while/after outdoors.	36.9%
Mobile technologies improve/add to my experiences in outdoor activities.	33.6%
I use mobile technologies when I participate in outdoor activities.	34.5%
I use mobile phones with GPS features/maps/location-aware apps when participating in outdoor activities.	20.4%



Overlap in Fishing Participation

The overlap chart shows very clearly how dominating the freshwater fishing category is in relation to the others. Of the 45.4 million people that fish, 29.8 million exclusively fish in the freshwater category.

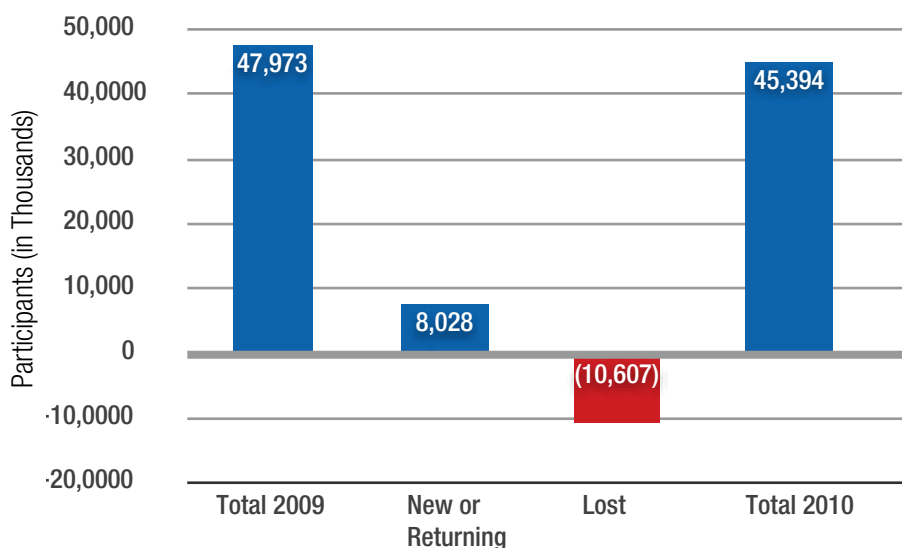


Type of Fishing Participants	Participants Ages 6+
Fly and Freshwater and Saltwater Fishing	1,573,000
Fly and Freshwater Fishing	2,125,000
Fly and Saltwater Fishing	151,000
Freshwater and Saltwater Fishing	5,332,000
Fly Fishing Only	1,630,000
Freshwater Fishing Only	29,831,000
Saltwater Fishing Only	4,753,000
Any Fishing	45,394,000

The Leaky Bucket

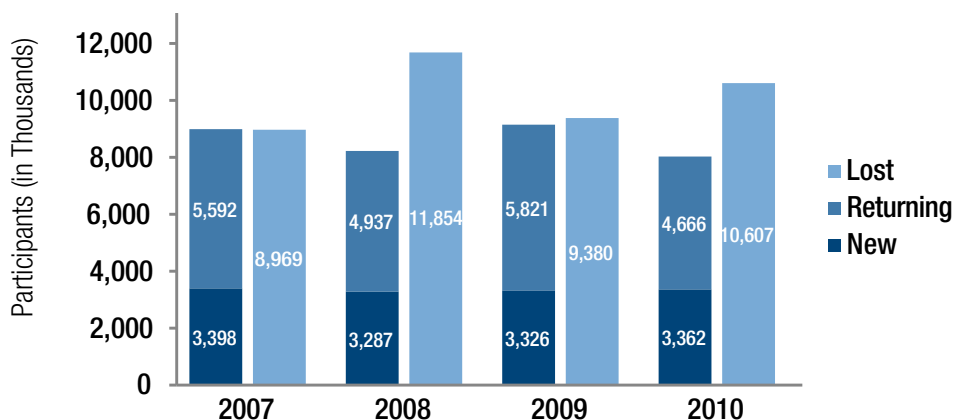
The Leaky Bucket analysis is one of the most dramatic graphical representations of what is happening with gains and losses in fishing participation. New participants join the sport at a rate of 18 percent per year; however, fishing loses participants at a rate of 19.4 percent per year.

If fishing loses participants as fast as it gains them, then the sport is destined to see lower numbers for all sorts of related categories. Everything starts with participation. If people don't participate then they don't need permits, buy equipment or take fishing trips.



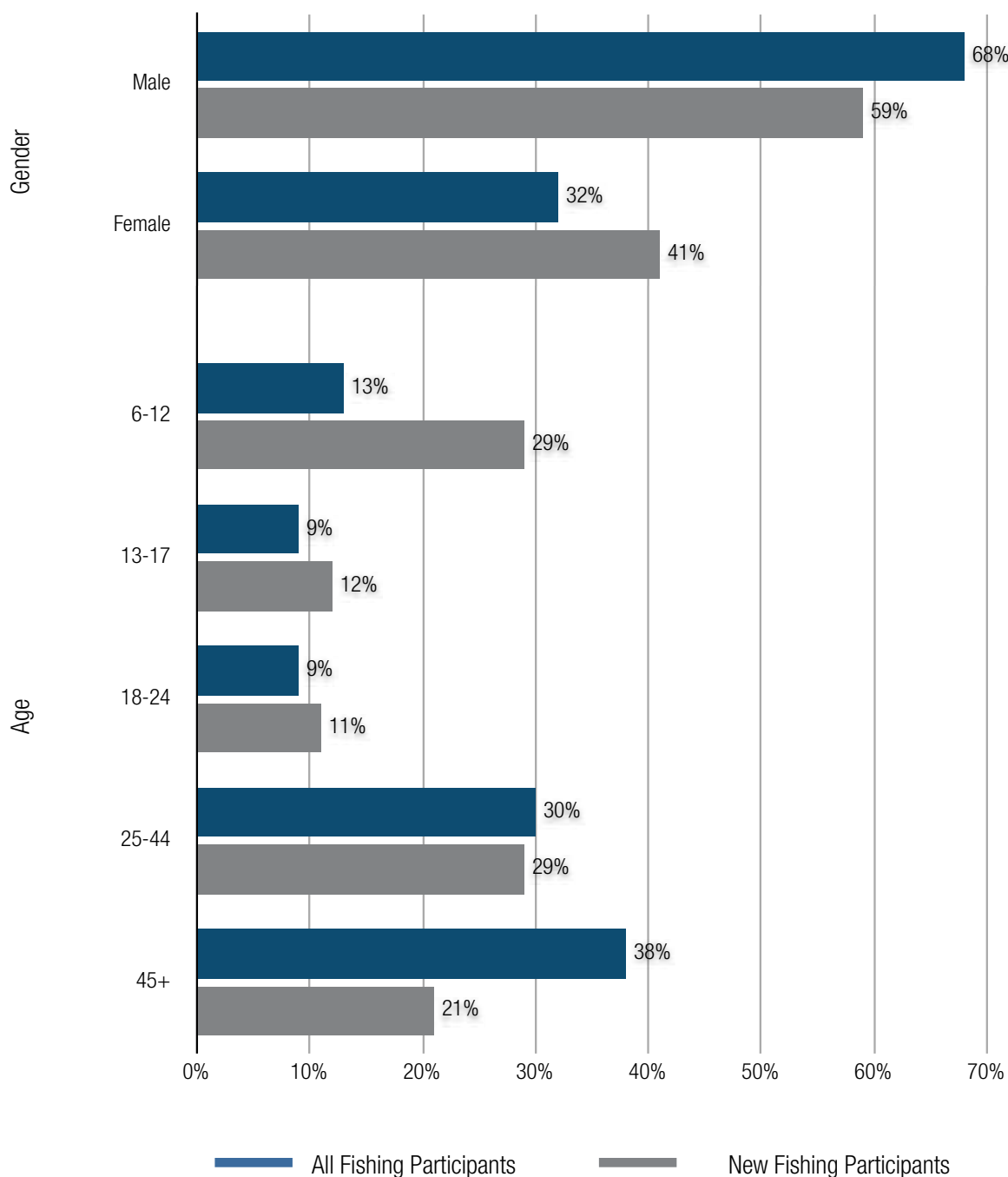
Trends in “Lost” Participants

This chart shows where the elements that go into the previous Leaky Bucket analysis come from. Fishing has been very consistent attracting new people to the sport, but fishing loses more participants than it gains each year. The good news is that the rate of loss is decreasing.



Who are the New Fishing Participants?

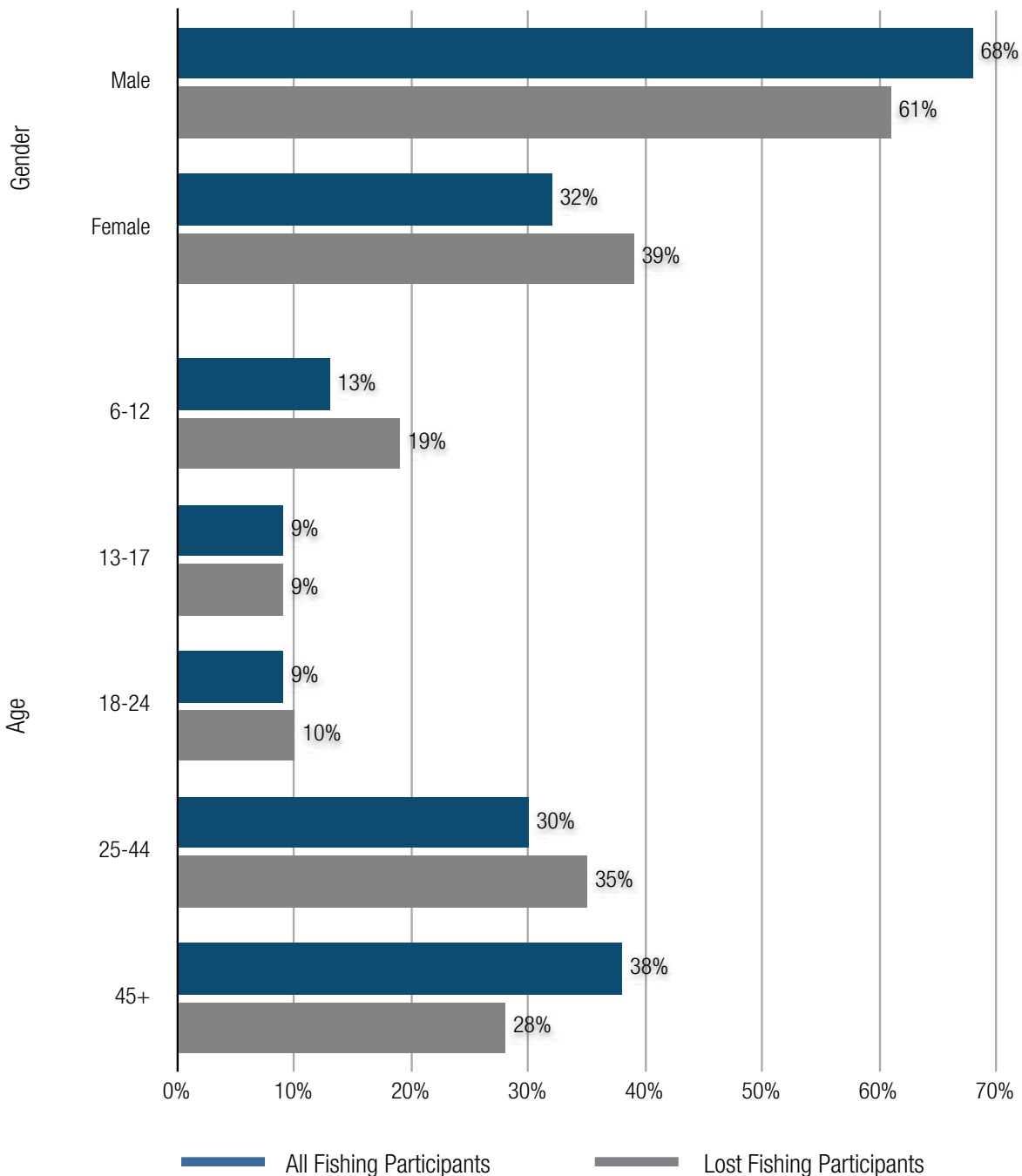
Females and youth ages six to 12 added the most new fishing participants. This means that fishing appears to be taking hold with younger participants, especially the female ones. While the sport is still very male dominated, younger women and girls represent a good longterm growth target.





Who are the Lost Fishing Participants?

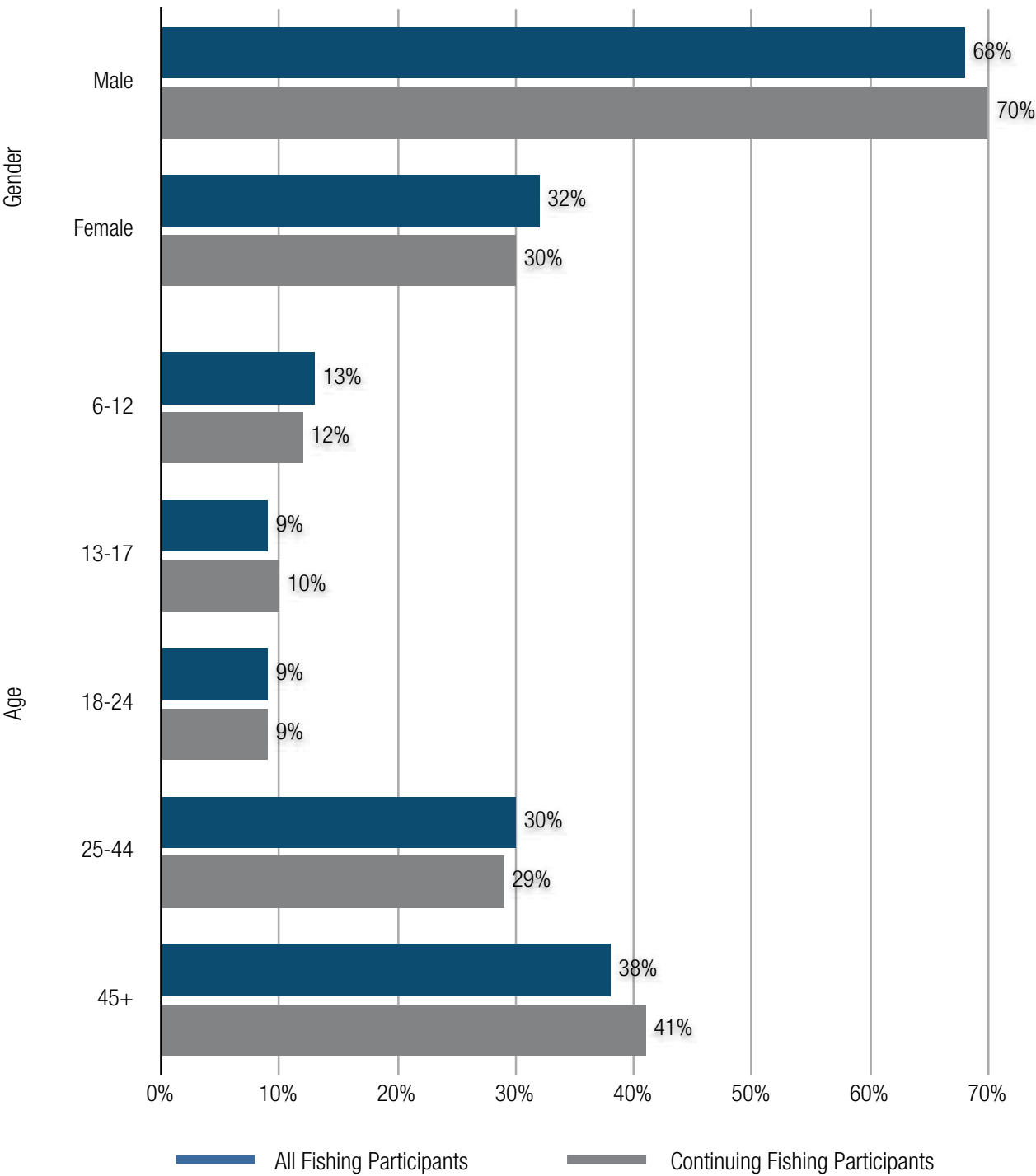
Females and youth ages six to 12 also lost the highest percentage of fishing participants.





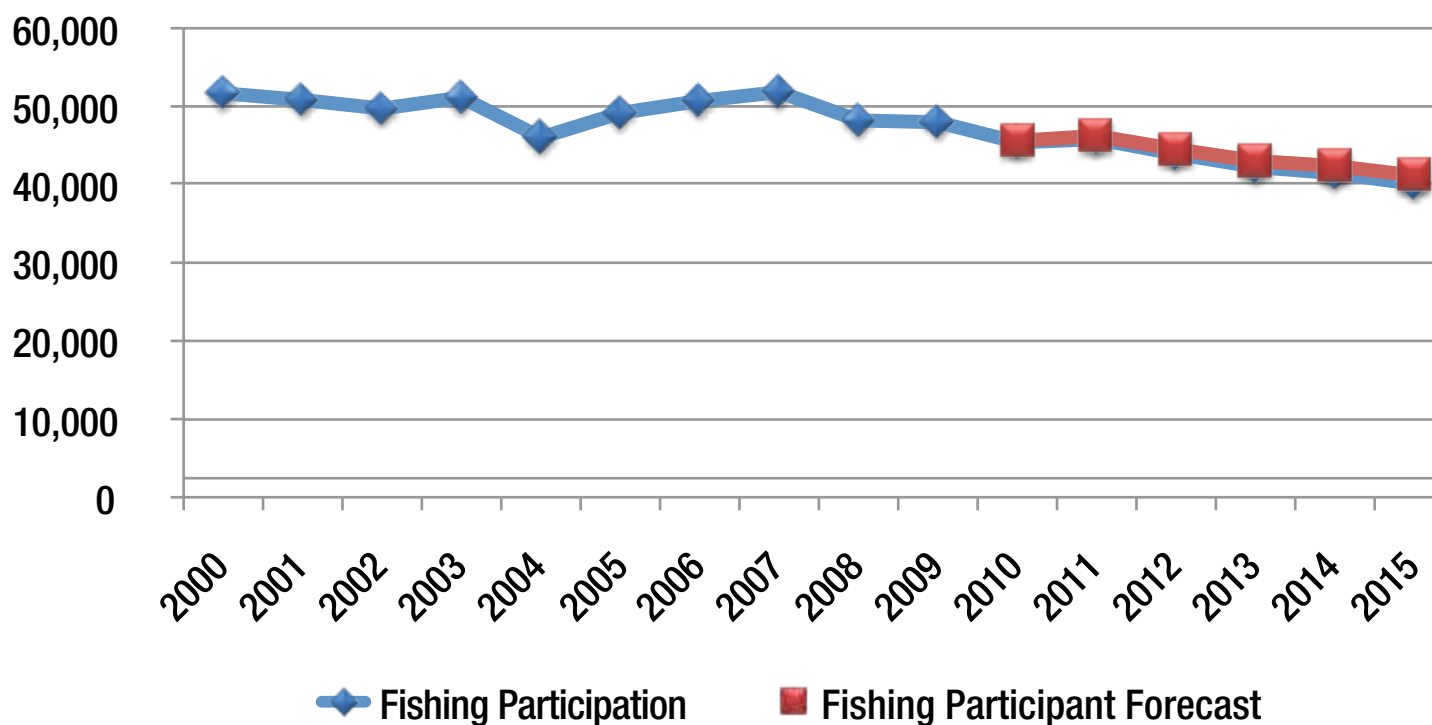
Who are the Continuing Fishing Participants?

The profile of continuing fishing participants is similar to the profile of all fishing participants. They are largely male and older than age 45.



Fishing Participant Forecast

The Fishing Participant Forecast shows that fishing will remain at its current level of participation over the next five years. That's the good news. The bad news is that even though fishing will maintain the same levels of participation in terms of the numbers of people, the rate or share of people that participate will actually show a decline as the population of the United States increases.



POTENTIAL NEW FISHING PARTICIPANTS

More than nine percent of Americans over the age of six are interested in fishing. Of those, 45.9 percent are female and 32.6 percent are minorities, two populations currently underrepresented in the sport of fishing. Most of the new potential fishing participants cited exercise and staying fit as the top motivator for wanting to get outside.

To attract more people to the sport of fishing 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 don’t participate in fishing but are interested in becoming active in the sport and identify their motivations for getting involved in outdoor activities.

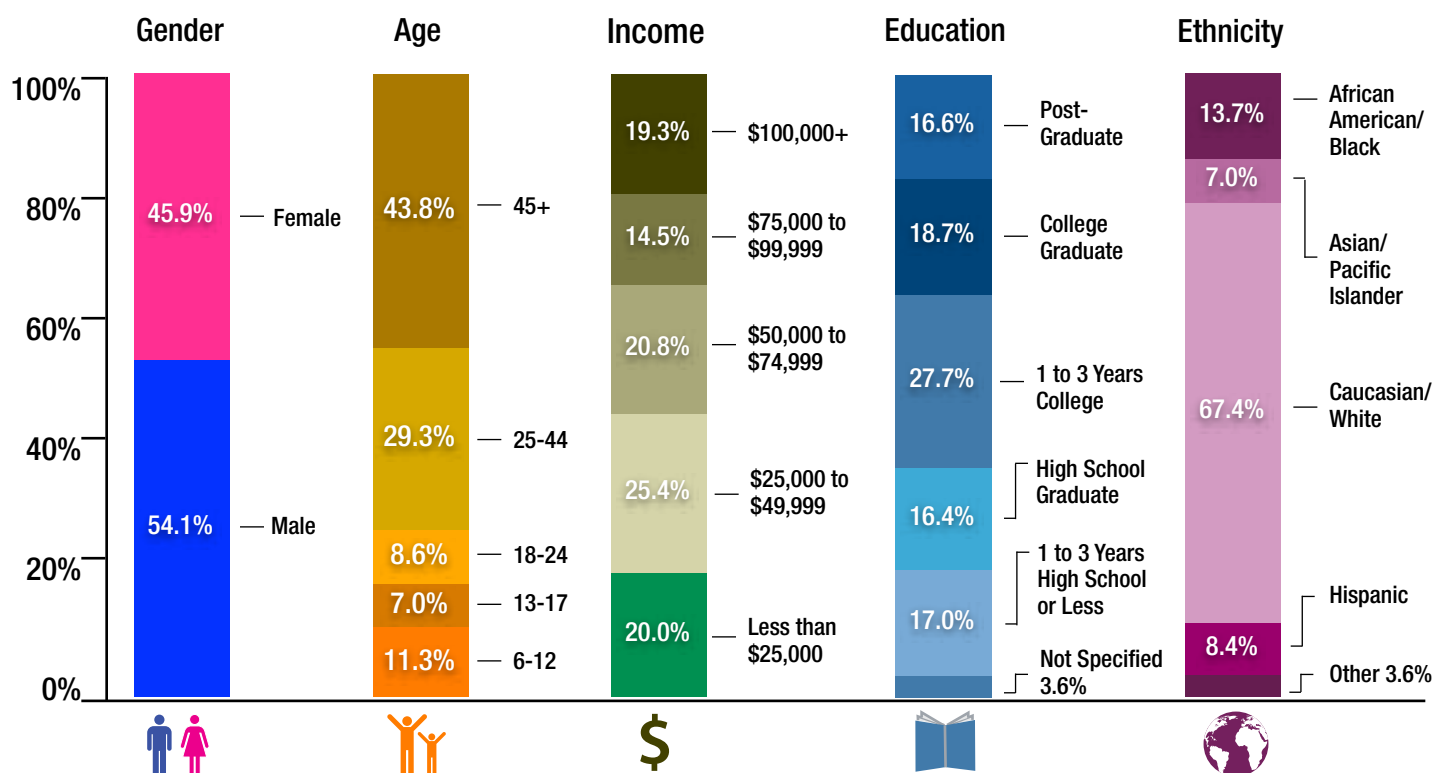
45+

The largest age bracket of potential new fishing participants.

54.6%

The percentage of people considering participation in fishing who say that outdoor activities are a good way to exercise.

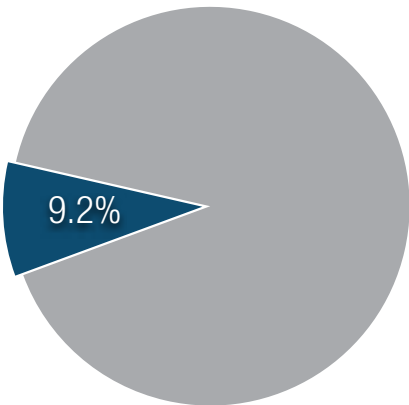
Demographics



Considering Participation in Fishing

Ages 6+

9.2% of Americans are considering participation in fishing.



Why Are You Interested in Outdoor Activities?

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 participation dominates all other fishing categories. Almost 39 million Americans, or 13.7 percent of the population, participated in freshwater fishing in 2010. To put freshwater fishing's popularity in perspective, the next most popular category, saltwater fishing, has about 27 million fewer participants.

Because freshwater streams, lakes and rivers are generally accessible throughout the United States, participation in freshwater fishing is widespread across the nation. The East North Central Region, including the five states bordering the Great Lakes, had a higher percentage of freshwater fishing participants than other regions at 19.2 percent of total participants.

In 2010, more than 23 percent of freshwater fishing participants were youth, a 10-percentage point jump since 2009.

1 to 3 Years College

The largest education bracket of freshwater fishing participants.

32.1% Females

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

Total Participation

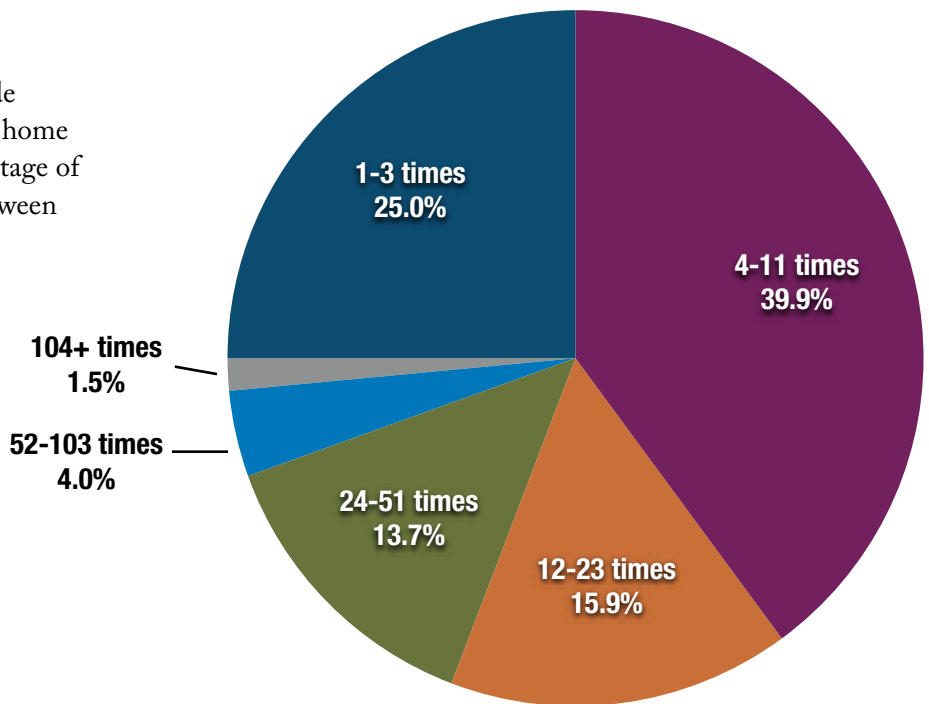
2006	43.1 million participants 16.3% of Americans ages 6+
2007	43.9 million participants 15.8% of Americans ages 6+
2008	40.3 million participants 14.4% of Americans ages 6+
2009	41.0 million participants 14.5% of Americans ages 6+
2010	38.9 million participants 13.7% of Americans ages 6+

Annual Outings

In 2010, freshwater fishing participants made 663 million annual outings—either close to home or on an overnight trip. A significant percentage of these participants (39.9 percent) get out between once a season and once a month.

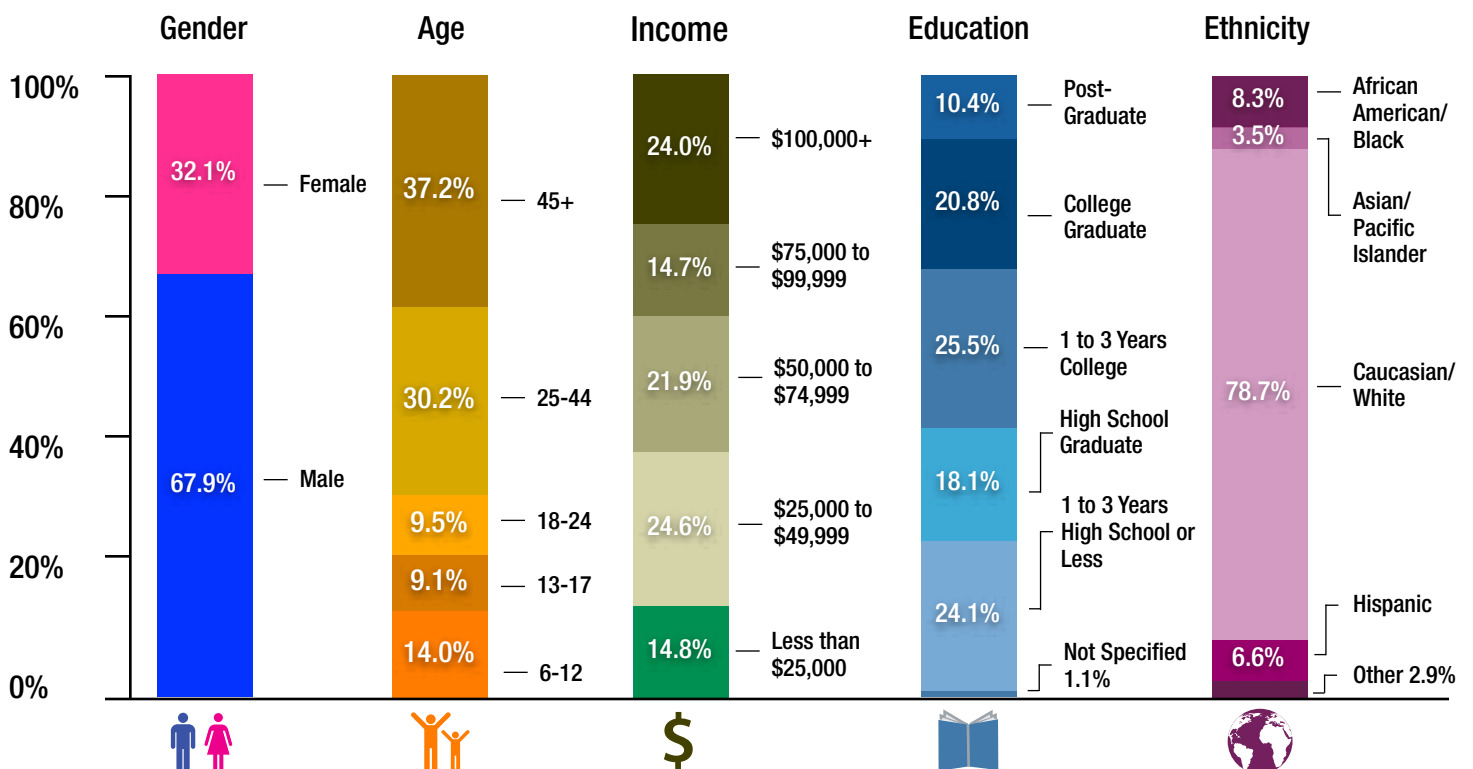
17.1 days

The average number of annual outings per freshwater fishing participant.



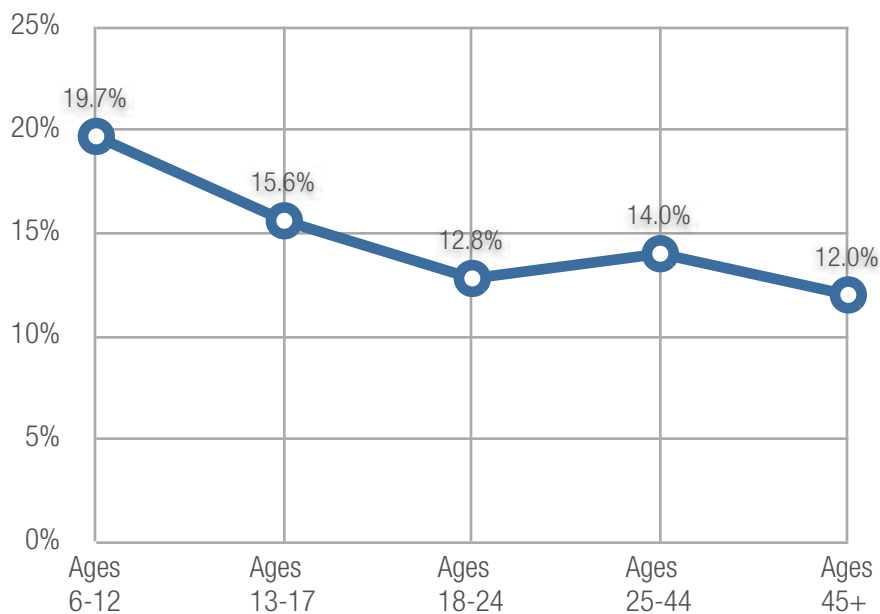
Annual Outings Among Freshwater Fishing Participants, Ages 6+

Demographics



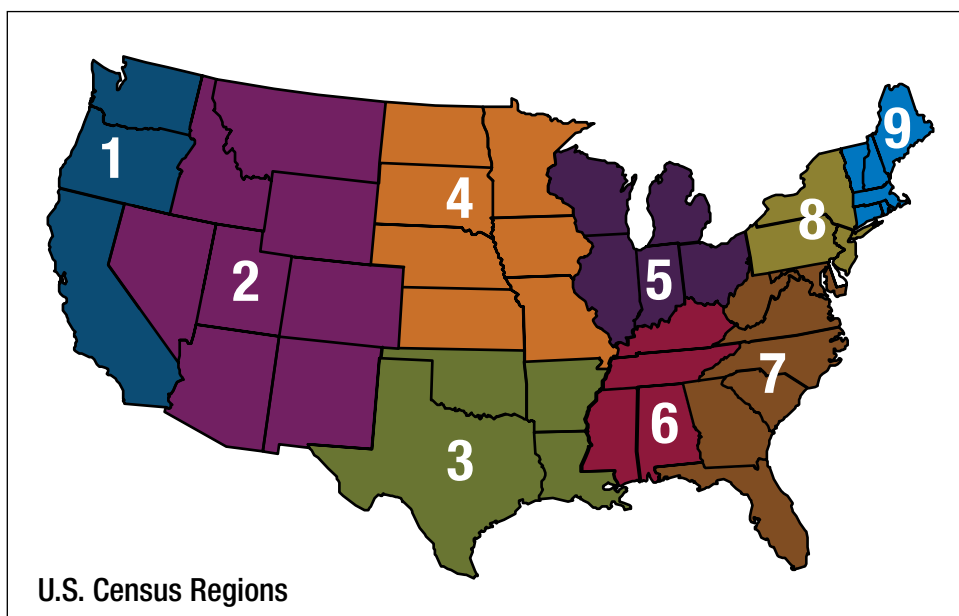
Participation Life Cycle

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

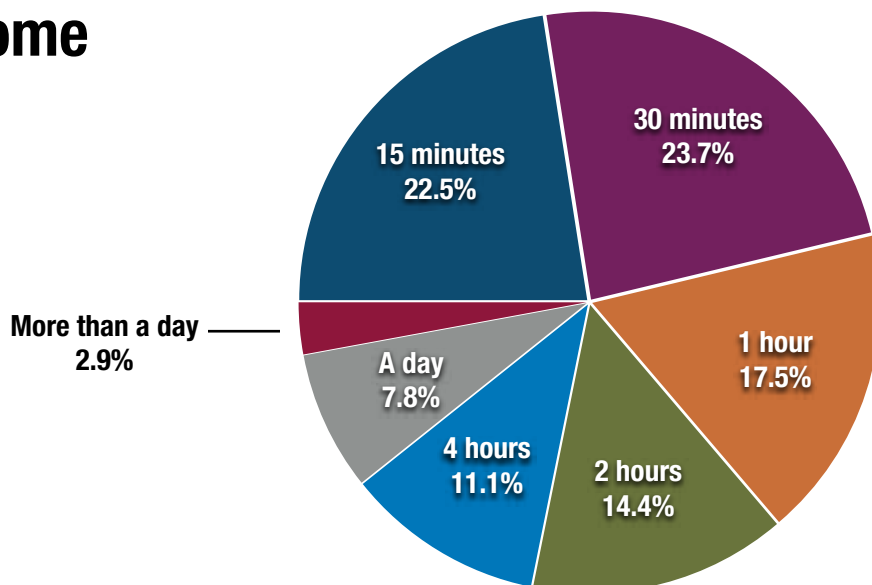
- 1. Pacific: **10.4%**
- 2. Mountain: **8.6%**
- 3. West South Central: **12.5%**
- 4. West North Central: **9.8%**
- 5. East North Central: **19.2%**
- 6. East South Central: **8.2%**
- 7. South Atlantic: **16.8%**
- 8. Middle Atlantic: **10.4%**
- 9. New England: **4.1%**





Time Traveled from Home

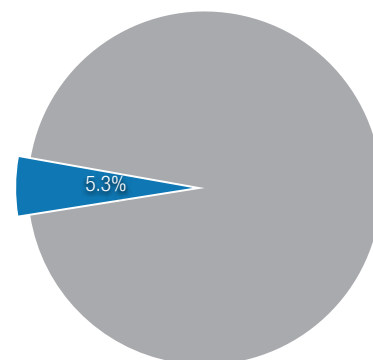
Freshwater fishing participants can travel anywhere from a few minutes to a few days from home to go fishing. Surveying the time freshwater participants traveled on their last in-season freshwater fishing trip reveals how far they usually travel and how often fishing leads them on more distant excursions.



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

First-Time Participants

5.3% of freshwater fishing participants tried the sport for the first time in 2010.



Freshwater Fishing Participants, Ages 6+

Competition and Overnight Travel

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.

* Based on 2008 data



SALTWATER FISHING

With 11.8 million participants, or 4.2 percent of the population, saltwater fishing is the second most popular type of fishing. Less accessible than freshwater fishing, saltwater fishing enthusiasts traveled the longest distance to engage in the sport. Almost 20 percent traveled a day or more on their last in-season trip.

The majority of saltwater participants are Caucasian males over the age of 45. They are the wealthiest when compared to participants in the other categories with 35.1 percent earning more than \$100,000 per year. More than 32 percent live in the South Atlantic region, which includes states along the Atlantic Coast from Maryland to Florida.

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+

South Atlantic

32.6% of saltwater fishing participants live along the southern Eastern coast—a higher percentage than any other region.

Ages 45+

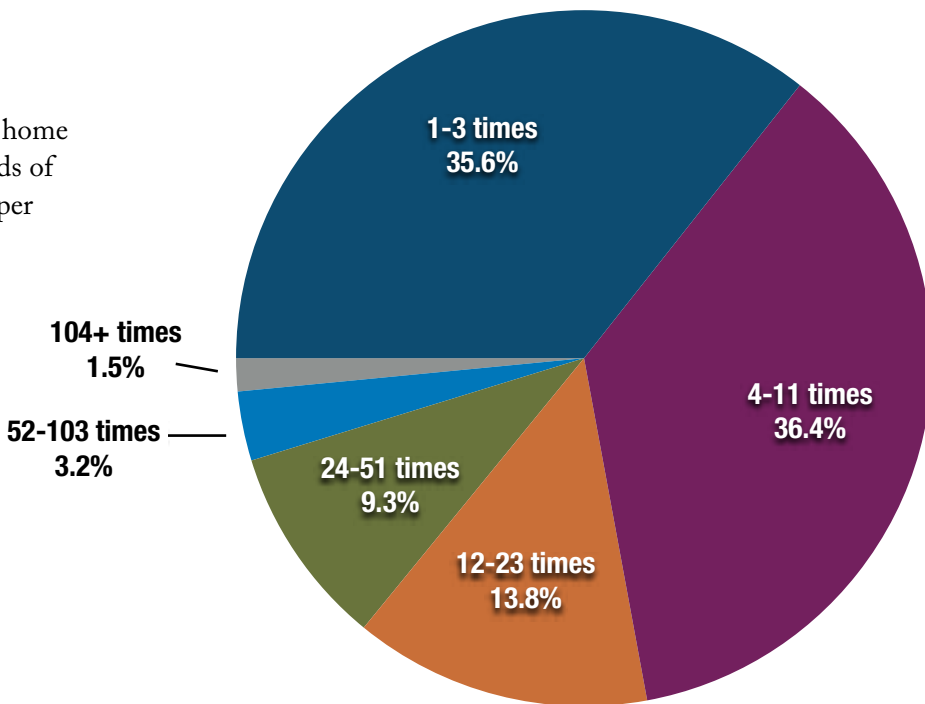
The largest age bracket of saltwater fishing participants, making up 43.5% of all participants.

Annual Outings

In 2010, saltwater fishing participants made 171 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.

14.5 days

The average number of annual outings per saltwater fishing participant.

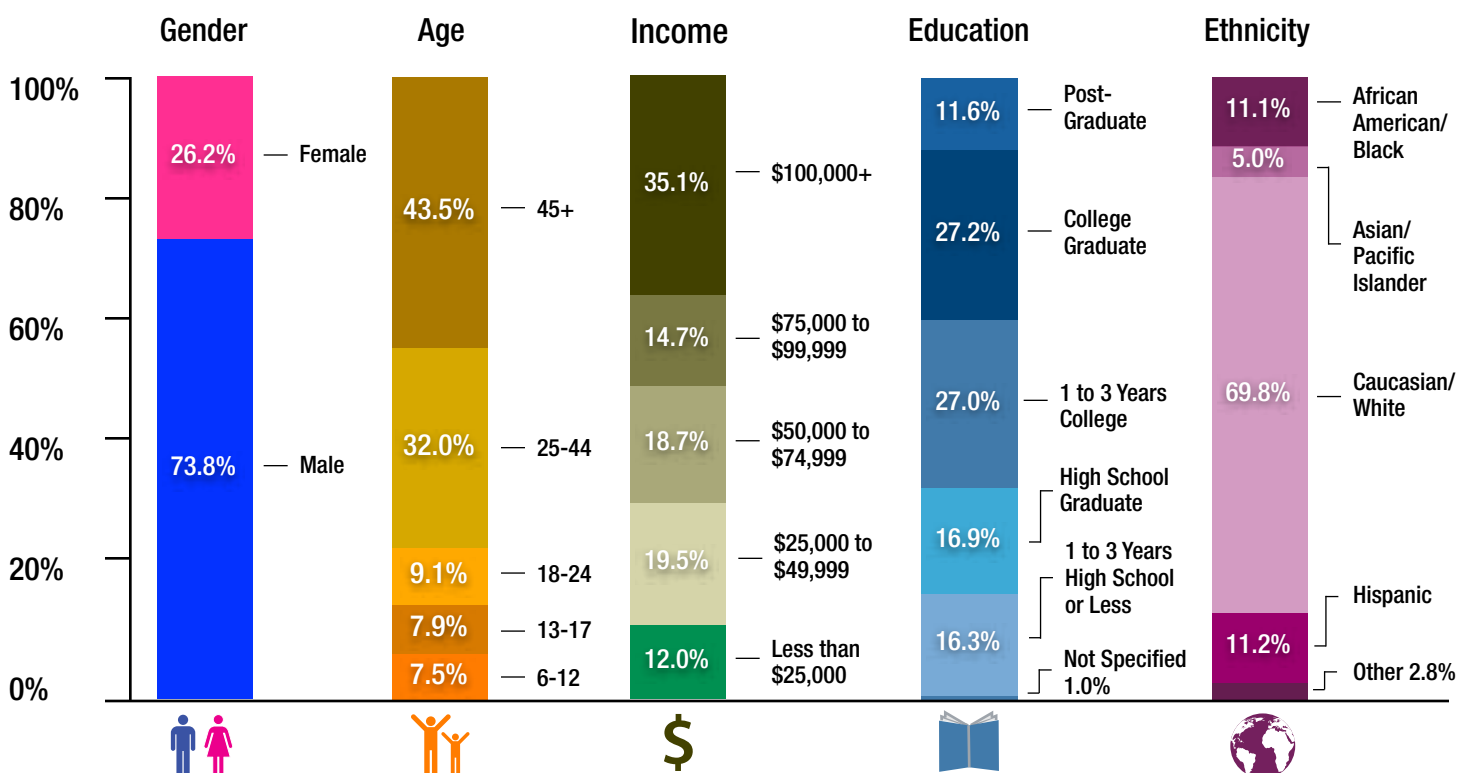


Annual Outings Among Saltwater Fishing Participants, Ages 6+

\$100,000+

The largest income bracket of saltwater fishing participants.

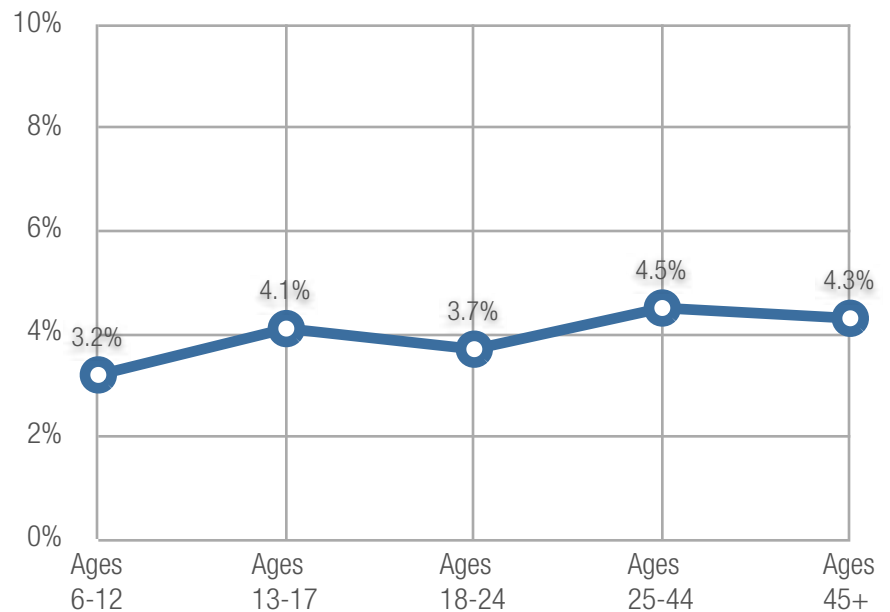
Demographics



Participation Life Cycle

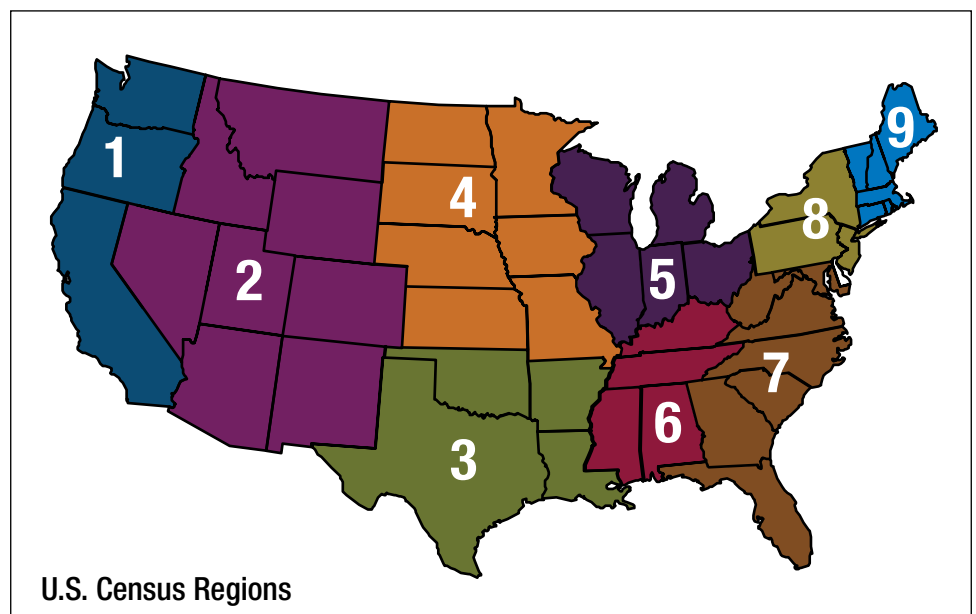
The participation rate among different age groups varies as individuals age and their lives are shaped by their environment and life experiences. A one-year snapshot of saltwater fishing participation helps describe this life cycle of participation.

Unlike many other outdoor activities, saltwater fishing participation increases among ages 25 to 44, rising higher than participation among ages 6 to 24.



Geography of Participants

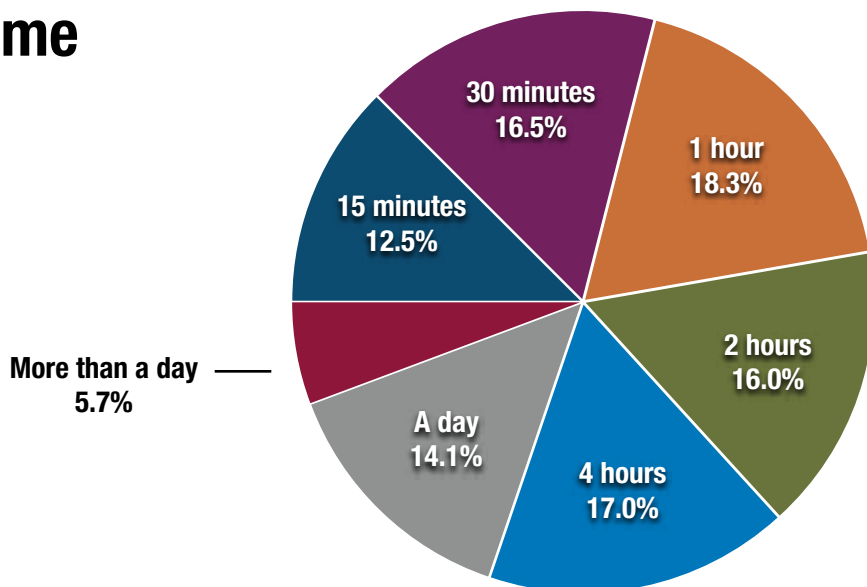
- 1. Pacific: **14.4%**
- 2. Mountain: **1.7%**
- 3. West South Central: **14.1%**
- 4. West North Central: **1.6%**
- 5. East North Central: **7.1%**
- 6. East South Central: **5.2%**
- 7. South Atlantic: **32.6%**
- 8. Middle Atlantic: **15.0%**
- 9. New England: **8.2%**





Time Traveled from Home

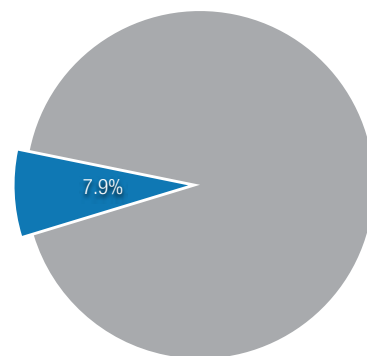
Saltwater fishing participants can travel anywhere from a few minutes to a few days from home to go fishing. Surveying the time saltwater participants traveled on their last in-season saltwater fishing trip reveals how far they usually travel and how often fishing leads them on more distant excursions.



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

First-Time Participants

7.9% of saltwater fishing participants tried the sport for the first time in 2010.



Saltwater Fishing Participants, Ages 6+

Competition and Overnight Travel

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.

* Based on 2008 data



FLY FISHING

There are 5.5 million fly fishing devotees in the United States. Although they account for only 1.9 percent of Americans over the age of six, they average 16.6 annual outings per participant, just behind the 17.1 annual outings taken by freshwater fishing participants. And, 14.9 percent of fly fishing participants tried the sport for the first time in 2010, which is positive news for recruiting new enthusiasts to the sport.

Compared to freshwater and saltwater fishing, fly fishing skews heavily male with males making up 78.9 percent of all participants. Fly fishing enthusiasts are also typically more educated than those in other categories. Forty-five percent have a college diploma or post-graduate degree.

Pacific

Most fly fishing participants live in California, Oregon and Washington.

Males

78.9% of fly fishing participants are male.

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+

73.1%

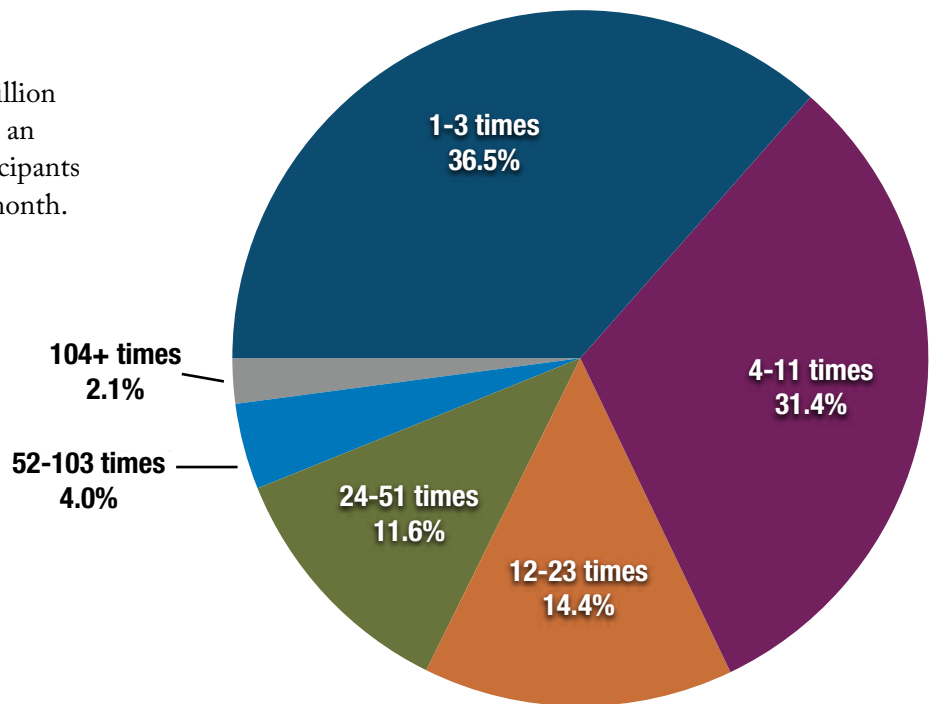
The percentage of fly fishing participants ages 25 and older.

Annual Outings

In 2010, fly fishing participants made 91 million annual outings—either close to home or on an overnight trip. Just under one-third of participants get out between once a season and once a month.

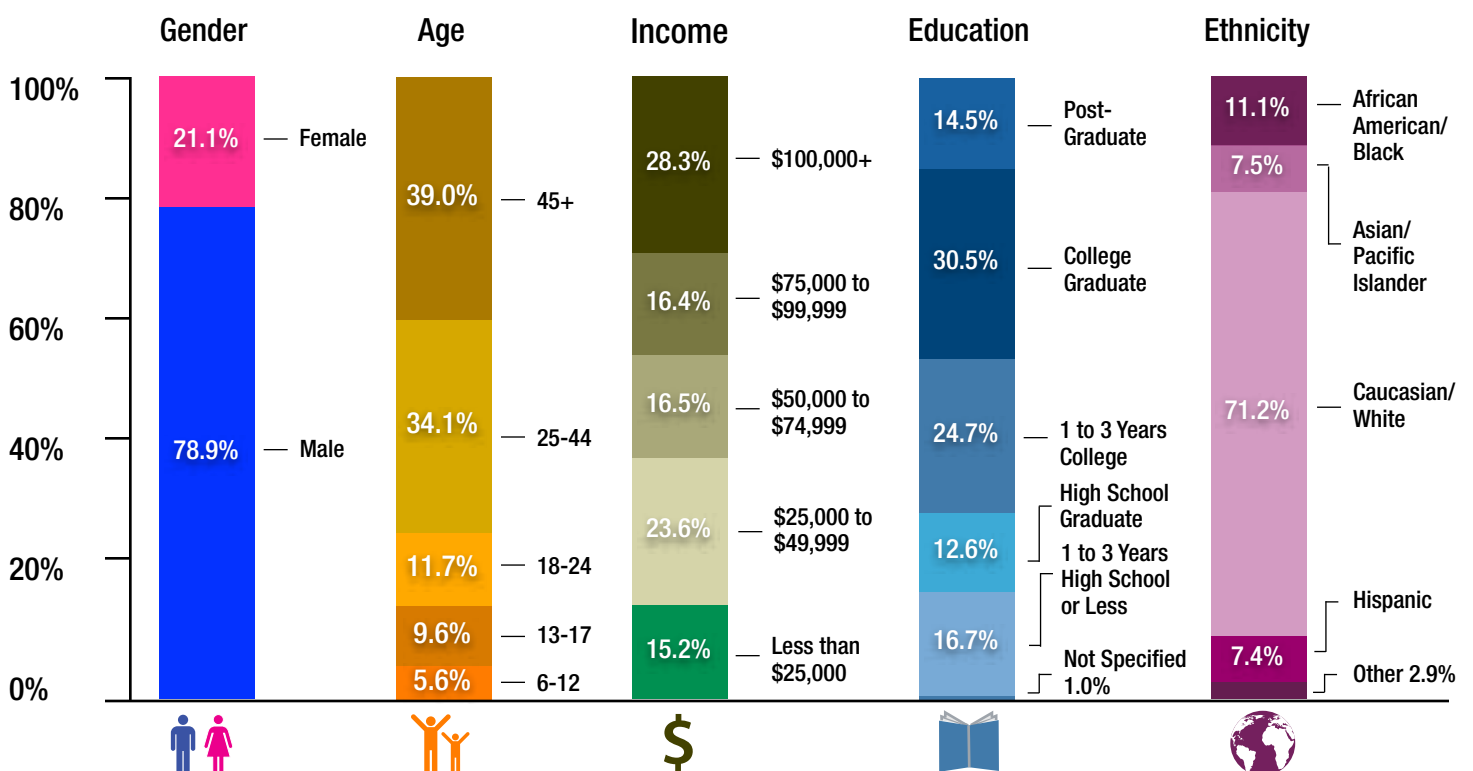
16.6 days

The average number of annual outings per fly fishing participant.



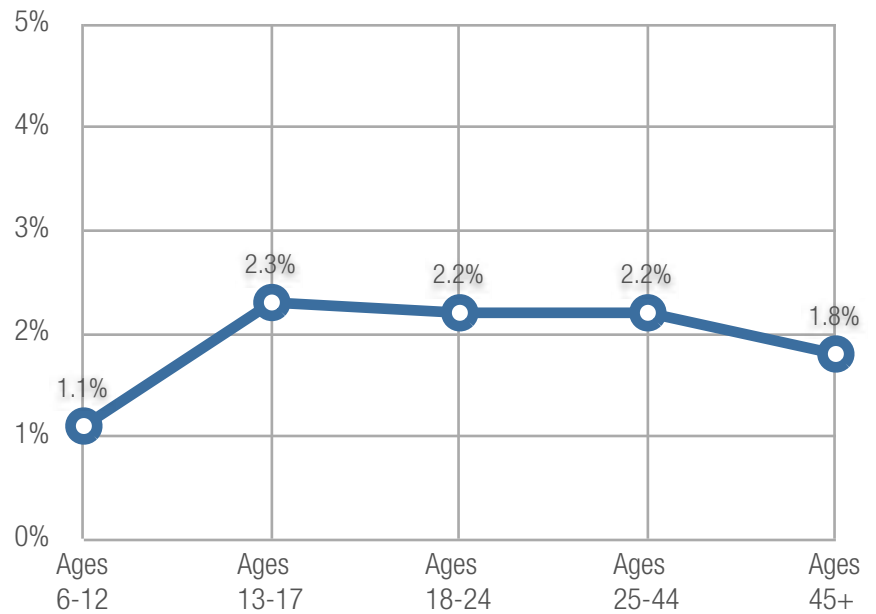
Annual Outings Among Fly Fishing Participants, Ages 6+

Demographics



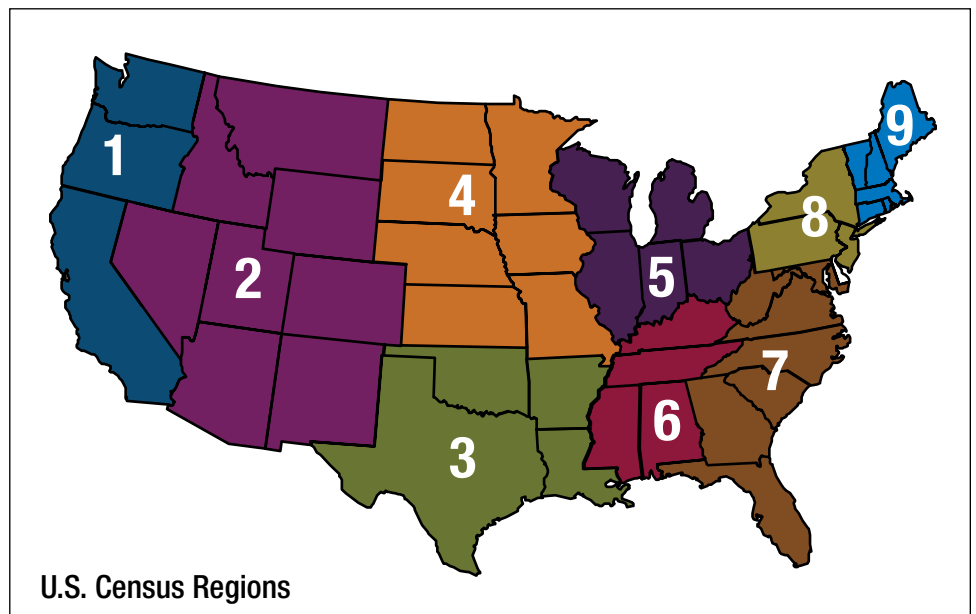
Participation Life Cycle

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.



Geography of Participants

1. Pacific: **16.5%**
2. Mountain: **13.2%**
3. West South Central: **9.7%**
4. West North Central: **4.7%**
5. East North Central: **16.1%**
6. East South Central: **6.3%**
7. South Atlantic: **15.2%**
8. Middle Atlantic: **13.7%**
9. New England: **4.7%**

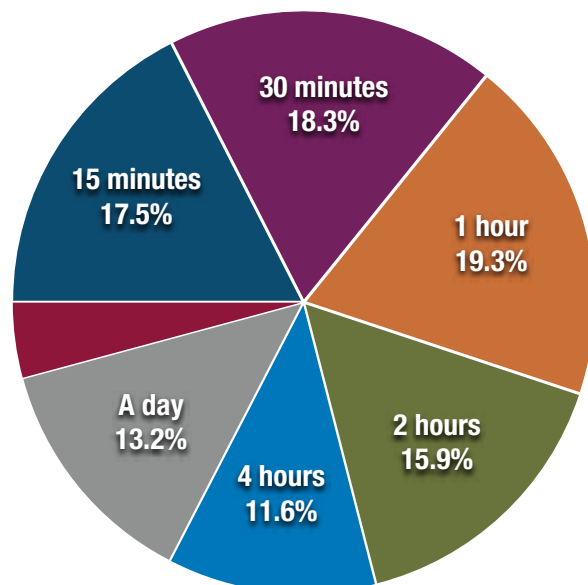




Time Traveled from Home

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.

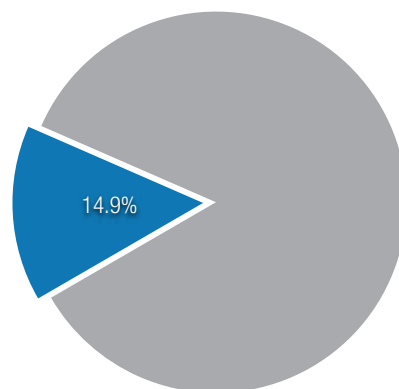
More than a day
4.2%



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

First-Time Participants

14.9% of fly fishing participants tried the sport for the first time in 2010.



Fly Fishing Participants, Ages 6+

Competition and Overnight Travel

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.

* Based on 2008 data



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. Six million, or 21.9 percent, of those in the youngest age bracket participate in fishing, while just over four million, or 18.6 percent, of adolescents participate.

The good news is that the loss rate from childhood to adolescents looks to be decreasing. In 2009, fishing saw a 6.4 percent gap between the six to 12 age bracket and the 13 to 17 age bracket. That gap narrowed to 3.3 percent in 2010.

As mentioned earlier in this report in the Leaky Bucket Analysis, inspiring youth to get outdoors is critical to the future of the sport. Research published by the Outdoor Foundation has shown that 90 percent of outdoor enthusiasts were introduced to nature-based activities between the ages of five and 18.

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

51.1%

The percentage of youth ages 13 to 17 who share experiences in outdoor recreation using mobile technologies or the internet.

Parents

Cited by 81.8 percent of youth fishing participants ages six 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'.

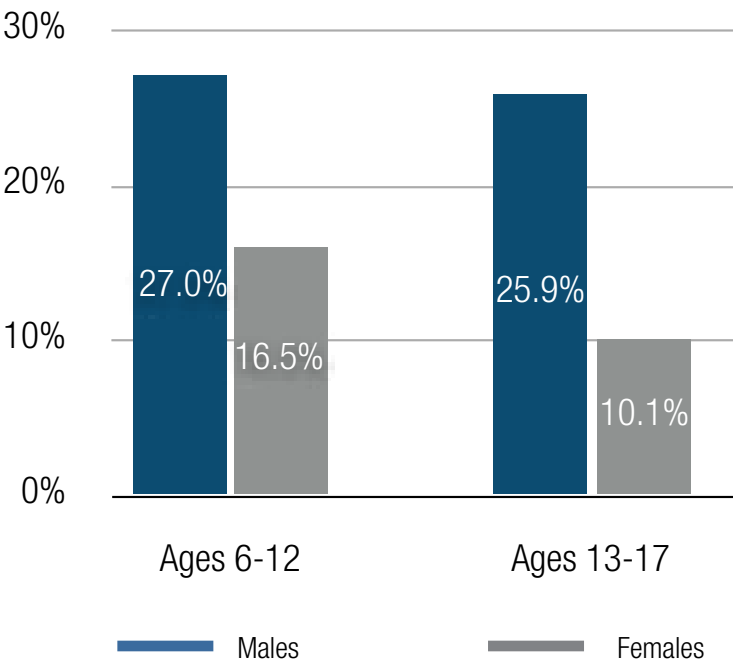
27%

The percentage of boys ages six to 12 that participate in fishing.

10.2 Million

The number of fishing participants ages six to 17, down one million since 2009.

Youth Participation in Fishing



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.



Crossover Participation

Youth Ages 6 to 17

Outdoor Activities

- 1. Road/Paved Surface Bicycling **39.7%**
- 2. Car or Backyard Camping **39.5%**
- 3. Road/Paved Surface Running **28.8%**
- 4. Hiking **24.6%**
- 5. RV Camping **19.2%**

Indoor Fitness Activities

- 1. Free Weights **21.7%**
- 2. Weight/Resistance Machines **12.1%**
- 3. Treadmill **11.7%**
- 4. Stretching **10.7%**
- 5. Home Gym Exercise **8.2%**

Team Sports

- 1. Basketball **30.7%**
- 2. Baseball **27.7%**
- 3. Football **25.4%**
- 4. Soccer **24.9%**
- 5. Volleyball **9.5%**

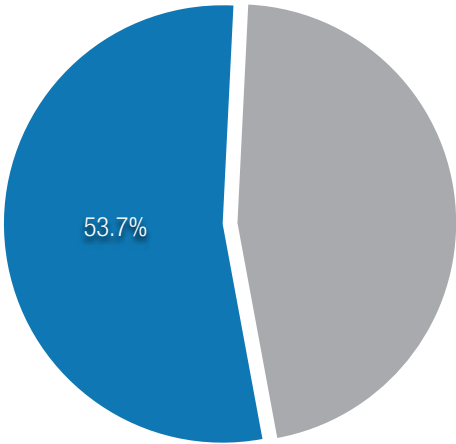
Other Activities

- 1. Bowling **41.8%**
- 2. Fitness Walking **26.6%**
- 3. Billiards **19.1%**
- 4. Skateboarding **17.8%**
- 5. Shooting and Target Shooting **16.8%**

Crossover Participation in Boating

Youth Ages 6 to 17

53.7% of youth fishing participants also participated in boating in 2010.



Youth Fishing Participants, Ages 6-17

What Keeps Youth Fishing Participants from Enjoying Outdoor Activities More Often?

	Ages 6-12	Ages 13-17
Too hot/cold/too poor weather	39.9%	34.5%
Time spent at school instead	38.3%	46.2%
Not enough vacation time	22.9%	22.9%
No one to go with	21.6%	26.1%
Don't have the right gear	20.4%	21.8%
Time spent with family instead	20.0%	20.3%
Rather spend time watching TV/movies	18.1%	12.6%
Don't have transportation options	17.8%	19.4%
Other reason	17.3%	10.4%
Time spent with friends instead	15.4%	28.9%
Prefer other activities/vacation options	14.4%	16.3%
Don't like bugs/animals	12.2%	13.3%
Concerned about vulnerability/security/safety	10.8%	6.5%
Hassle of setting up/cleaning up for activities	10.3%	10.3%
Prefer team sports	9.9%	11.1%
Rather spend time online	7.0%	9.1%
Nowhere nearby	6.9%	7.1%
Concerned about getting injured	6.2%	1.2%
Hassle of planning	5.9%	10.5%
Prefer indoor fitness activities	3.5%	3.4%
Don't enjoy physical activities	3.1%	2.9%
Not healthy/fit enough	2.8%	3.0%
Time spent at work instead	2.7%	8.5%
Lack of sleep	2.6%	3.8%
Concerned about sanitation issues/getting dirty	1.9%	2.6%

Youth Fishing Participants' Use of Technology to Share and Enhance Outdoor Experiences

	Ages 6-12	Ages 13-17
Mobile technologies take away from my enjoyment of outdoor activities.	28.7%	26.2%
I use a laptop/desktop computer to search for information about outdoor recreation activities/sites before/while/after outdoors.	27.9%	46.6%
I use mobile technologies/home computers/internet to plan/organize outdoor activities.	23.8%	45.0%
I like to share experiences in outdoor recreation with others through use of mobile technologies/internet.	21.3%	51.1%
Mobile technologies/internet make it easier to participate in outdoor activities with friends/on my own.	20.7%	42.7%
I use mobile technologies when I participate in outdoor activities.	19.8%	44.4%
Mobile technologies improve/add to my experiences in outdoor activities.	19.5%	38.5%
I use mobile technologies to search for information about outdoor recreation activities/sites before/while/after outdoors.	18.1%	31.9%
I use mobile phones with GPS features/maps/location-aware apps when participating in outdoor activities.	8.0%	14.6%



POTENTIAL NEW YOUTH FISHING PARTICIPANTS

The demographics of potential youth fishing participants are similar to the demographics of potential fishing participants of all ages. More than 39 percent of youth who are thinking about taking up fishing are minorities, and 40.6 percent are females. Top reasons for taking an interest in outdoor activities include exercise, relatives participating and a perception that the outdoors is cool.

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 don't participate in fishing but are interested in becoming active in the sport.

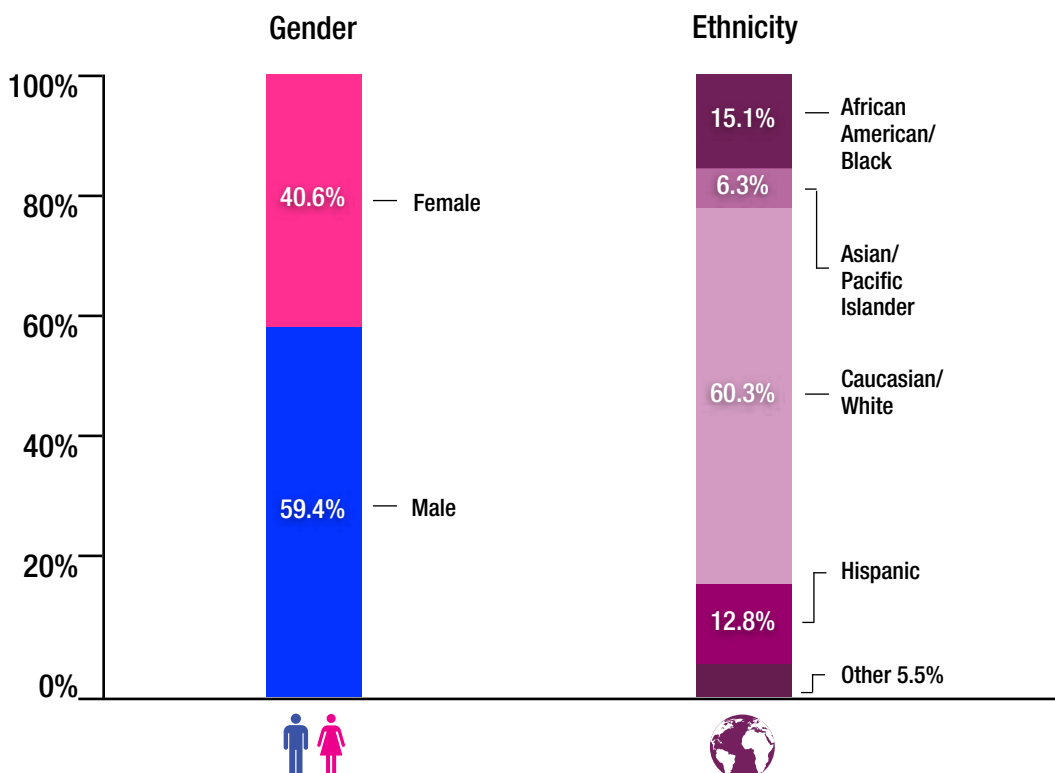
39.7%

The percentage of youth considering participation in fishing that are minorities.

Males

Almost 60% of those youths considering participation in fishing are male.

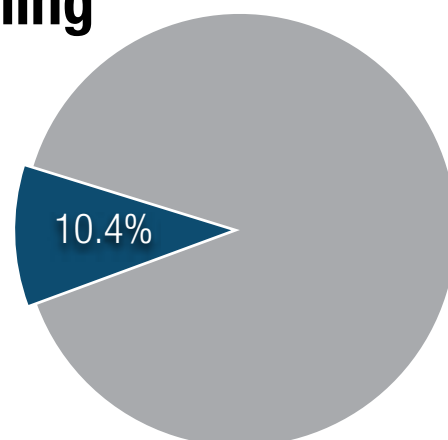
Demographics



Youth Considering Participation in Fishing

Americans Ages 6 to 17

10.4% of youth are considering participation in fishing.



Why Are You Interested in Outdoor Activities?

Americans Ages 6 to 17 Considering Participation in Fishing

	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

Hispanics are the largest minority group in the United States, but they make up a mere 7.4 percent of the fishing community. Freshwater fishing is, by far, the most popular kind of fishing among this growing group. Eleven percent of Hispanic Americans participate in freshwater fishing, and only 5.7 percent participate in saltwater fishing and 1.7 percent in fly fishing.

Those that do fish, fish a lot—21.3 days. And of those Hispanics who get out fishing, 65.4 percent are male.

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

The largest income bracket of Hispanic fishing participants.

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

age **25-44**

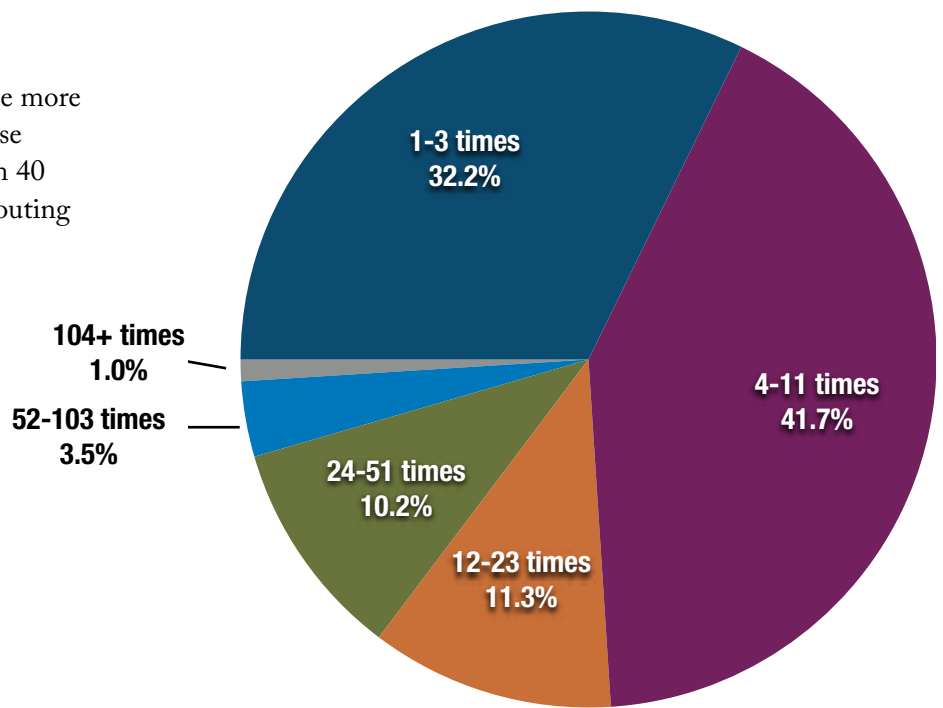
The largest age bracket of Hispanic fishing participants.

Annual Outings

In 2010, Hispanic fishing participants made more than 72 million annual outings—either close to home or on an overnight trip. More than 40 percent of participants made between one outing per month and one outing per season.

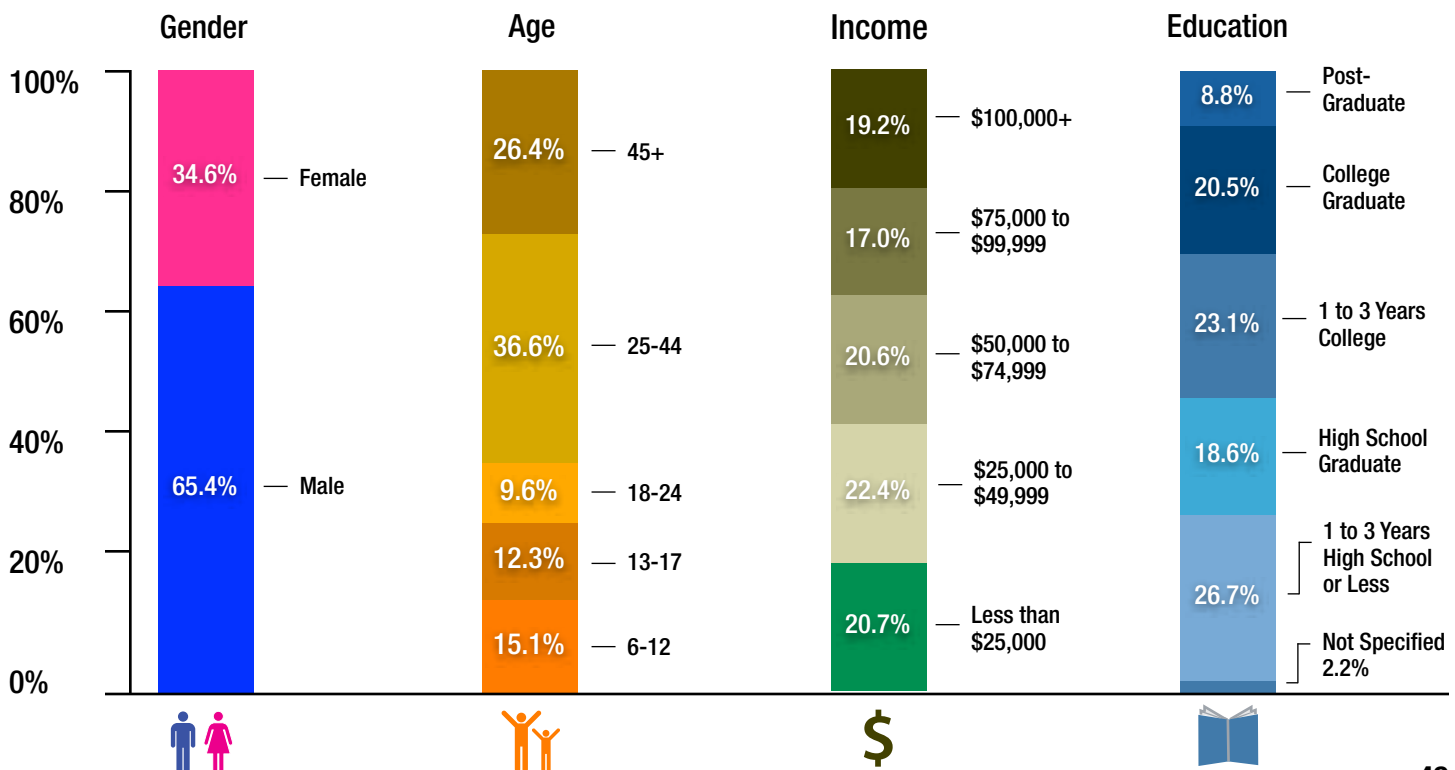
21.3 days

The average number of annual outings per Hispanic fishing participant.



Annual Outings Among Hispanic Fishing Participants, Ages 6+

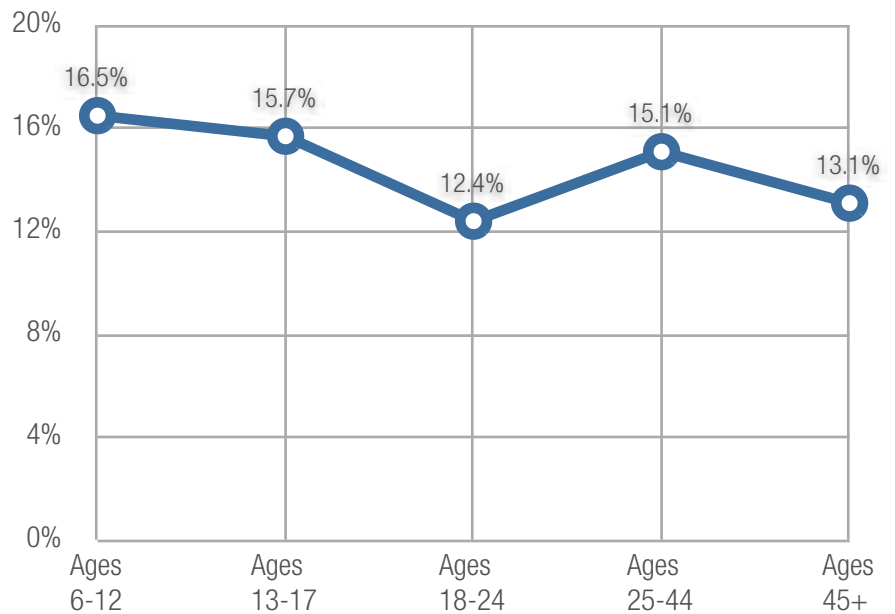
Demographics



Participation Life Cycle

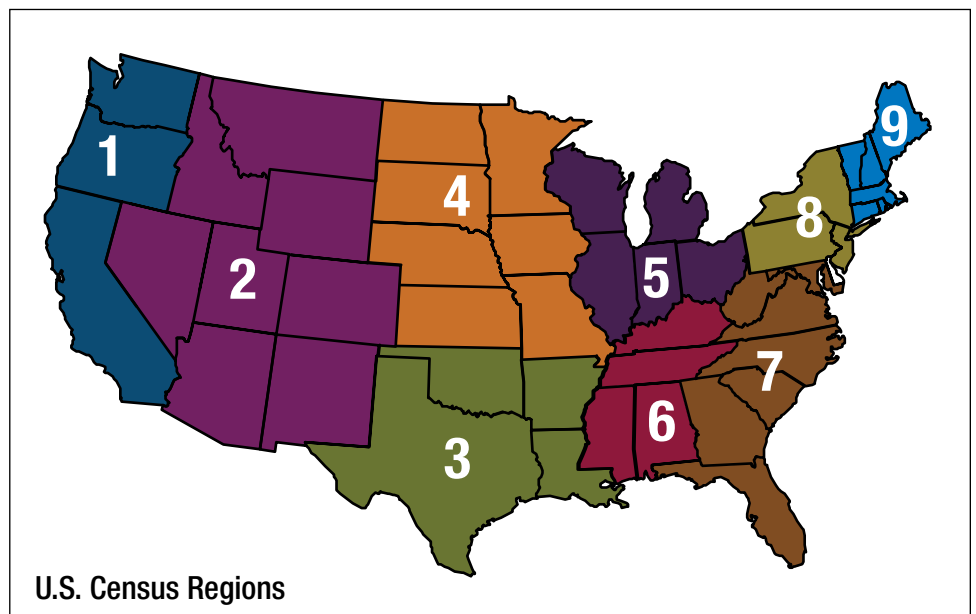
The participation rate among different age groups varies as individuals age and their lives are shaped by their environment and life experiences. A one-year snapshot of Hispanic fishing participation helps describe this life cycle of participation.

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: **20.0%**
- 2. Mountain: **13.1%**
- 3. West South Central: **24.2%**
- 4. West North Central: **4.6%**
- 5. East North Central: **6.5%**
- 6. East South Central: **2.7%**
- 7. South Atlantic: **18.7%**
- 8. Middle Atlantic: **9.1%**
- 9. New England: **1.1%**



Who Introduces Hispanic Fishing Participants to Outdoor Activities?

“Who influenced your decision to participate in outdoor activities?”		Hispanics 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 Enjoying Outdoor Activities More Often?

		Hispanics Ages 6+
Time spent with family instead		28.0%
Too hot/cold/too poor weather		27.1%
Not enough vacation time		26.3%
No one to go with		26.1%
Don't have the right gear		22.9%
Hassle of planning		20.5%
Time spent at work instead		19.3%
Other reason		19.3%
Time spent at school instead		18.8%
Concerned about getting injured		14.7%
Hassle of setting up/cleaning up for activities		13.9%
Time spent with friends instead		13.7%
Not healthy/fit enough		13.3%
Concerned about vulnerability/security/safety		12.5%
Nowhere nearby		12.3%
Prefer other activities/vacation options		11.6%
Lack of sleep		11.5%
Rather spend time watching TV/movies		11.4%
Don't like bugs/animals		9.7%
Rather spend time online		8.6%
Don't enjoy physical activities		5.5%
Concerned about sanitation issues/getting dirty		4.7%
Don't have transportation options		4.5%
Prefer indoor fitness activities		4.0%
Prefer team sports		2.8%



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 or Backyard Camping **35.3%**
2. Road/Paved Surface Running **31.5%**
3. Road/Paved Surface Bicycling **26.9%**
4. RV Camping **22.7%**
5. Hiking **21.8%**

Team Sports

1. Basketball **25.2%**
2. Football **24.0%**
3. Soccer **20.4%**
4. Volleyball **17.9%**
5. Baseball **17.5%**

Indoor Fitness Activities

1. Free Weights **36.9%**
2. Stationary Cycling **23.8%**
3. Treadmill **21.2%**
4. Aerobics **19.5%**
5. Stretching **19.2%**

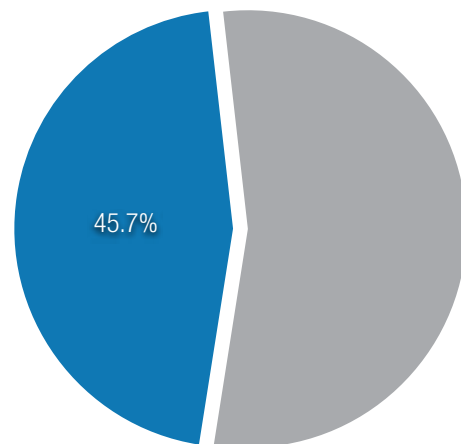
Other Activities

1. Fitness Walking **48.8%**
2. Bowling **43.1%**
3. Billiards **30.1%**
4. Golf **23.6%**
5. Darts **21.1%**

Crossover Participation in Boating

Hispanics Ages 6+

45.7% of Hispanic fishing participants also participated in boating in 2010.



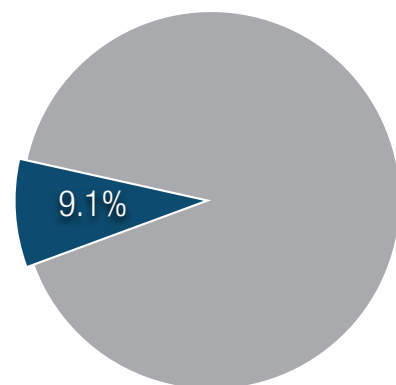
Hispanic Fishing Participants, Ages 6+

POTENTIAL NEW HISPANIC FISHING PARTICIPANTS

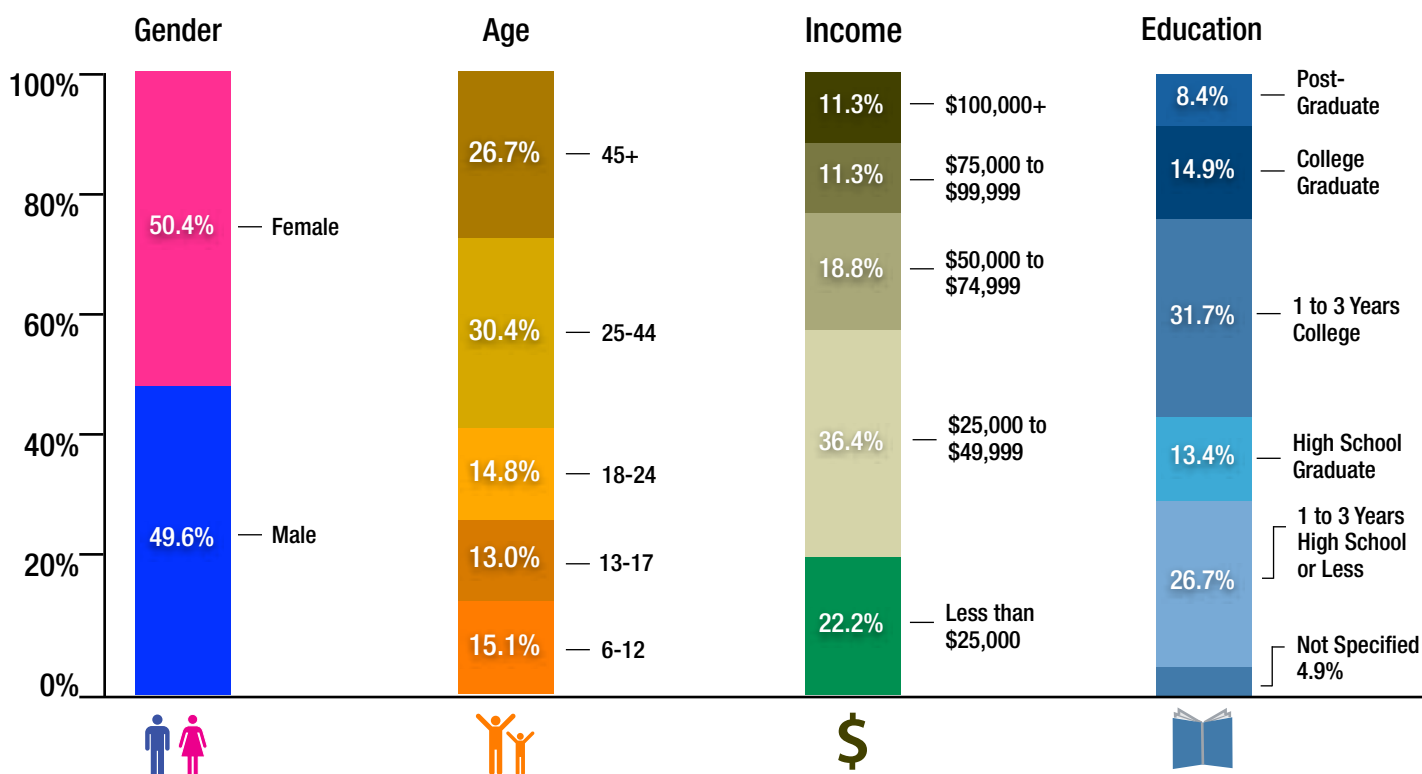
Just over nine percent of Hispanic Americans are considering participation in fishing. Although females make up only 34.6 percent of current Hispanic fishing participants, more than half of those considering joining the sport are female. The top motivator is exercise at 46.2 percent, followed closely by simply thinking the outdoors is cool at 46.1 percent.

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 U.S., Hispanics are underrepresented in outdoor activities, including fishing. The following pages profile Hispanics ages six and older who don’t participate in fishing but are interested in becoming active in the sport.

9.1% of Hispanic Americans Ages 6+ are considering participation in fishing.

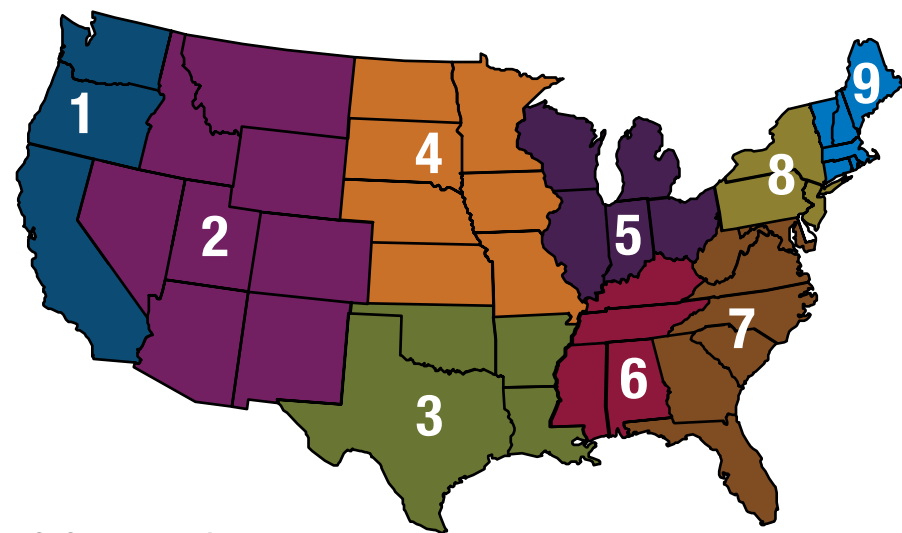


Demographics



Geography of Hispanic Americans Considering Fishing

- 1. Pacific: 21.1%
- 2. Mountain: 9.7%
- 3. West South Central: 34.4%
- 4. West North Central: 1.3%
- 5. East North Central: 7.5%
- 6. East South Central: 2.0%
- 7. South Atlantic: 9.5%
- 8. Middle Atlantic: 13.7%
- 9. New England: 0.7%



U.S. Census Regions

Why Are You Interested in Outdoor Activities?

Hispanics Ages 6+ Considering Participation in Fishing

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

For many fishing enthusiasts, boating is all part of the experience. Seven percent of Americans over the age of six own a boat. That equates to 19.9 million boat owners. Most of the privately-owned boats are bass boats at 21 percent.

The majority of boat owners—78.5 percent—own just one boat and 76.8 percent are not considering purchasing another. Most new boats (84.8 percent) were bought from a dealership, while most used boats (51.2 percent) were purchased from a friend. More than 60 percent of boat owners keep their boats at their primary residence.

It appears that, in 2010, the economic downturn was still affecting Americans, including outdoor enthusiasts. Boat ownership declined slightly from 20.5 million in 2009 to 19.9 million in 2010. Previous boat owners cite the expense as the reason for giving up their boat.

3.6%

The percentage of Americans ages 16+ who are considering buying a new or used boat.

\$100,000+

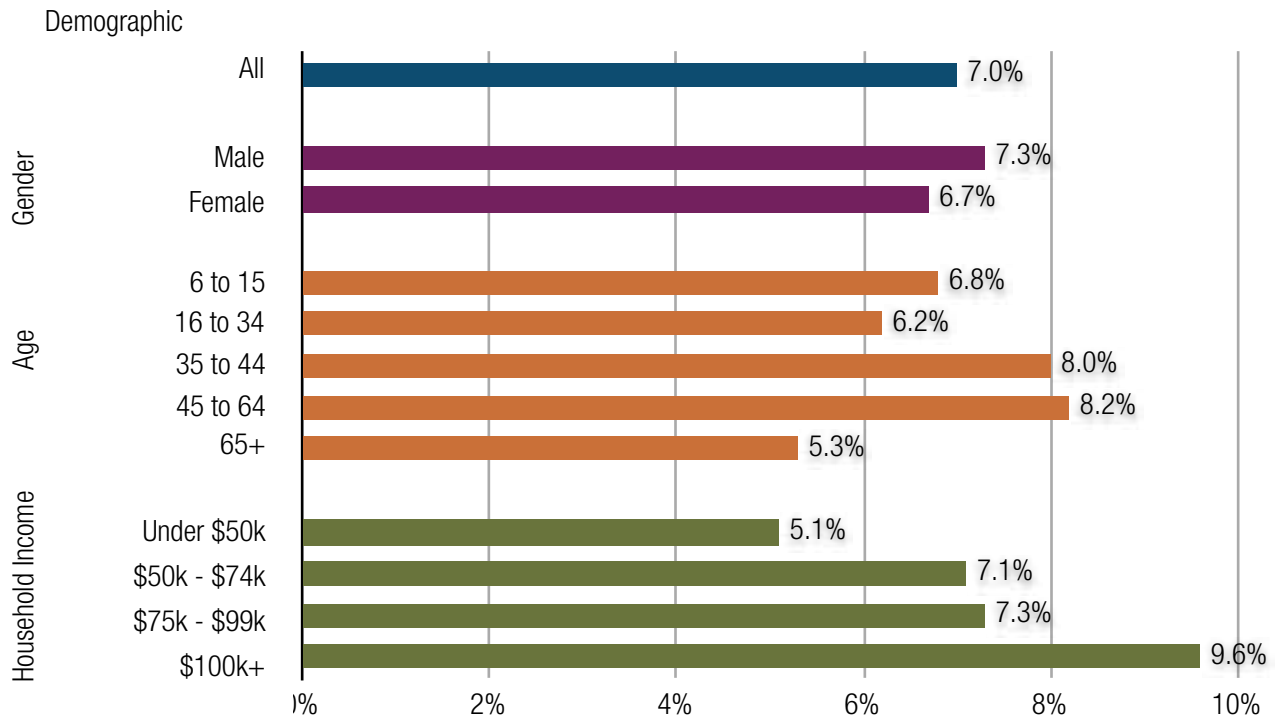
The boat ownership rate is highest in the top income bracket.

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

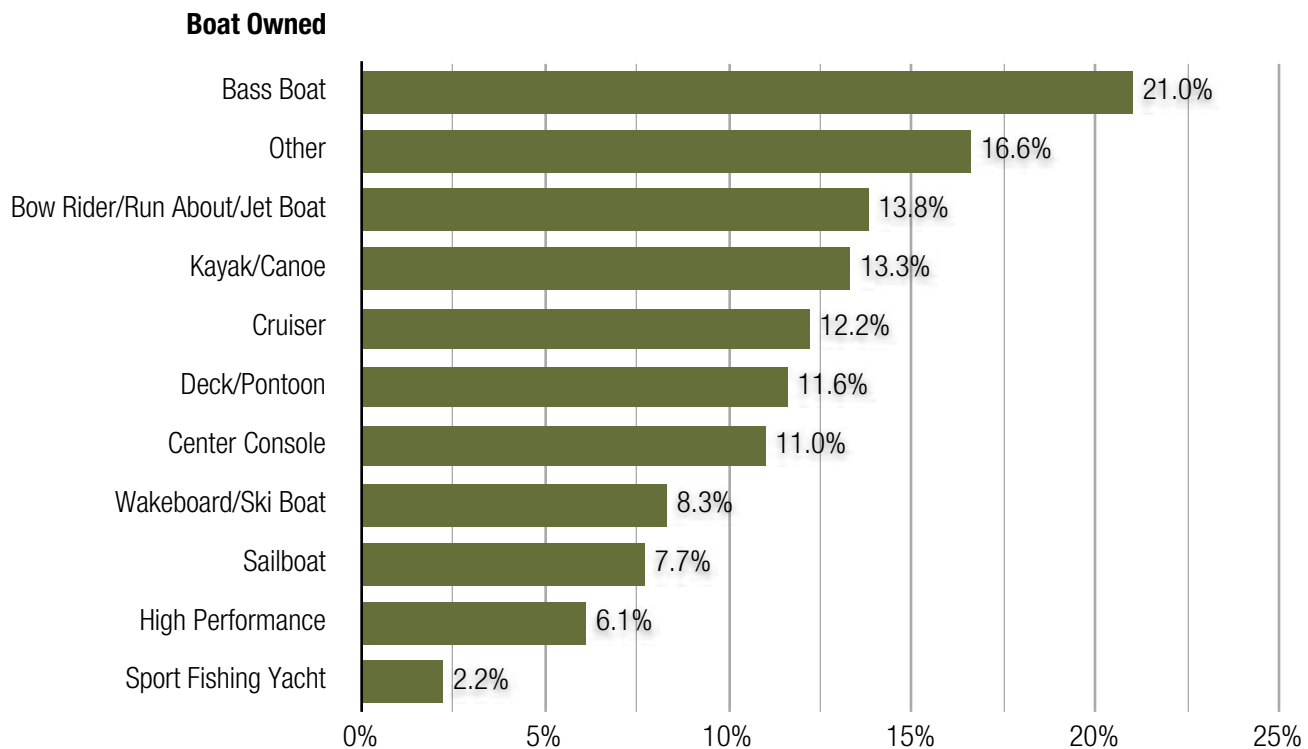
The overall boating ownership rates above are calculated from the main participation study, which uses the total population ages six and older.

Boat Ownership Rate by Demographic



Percentage of Boat Ownership, All Americans, 6+

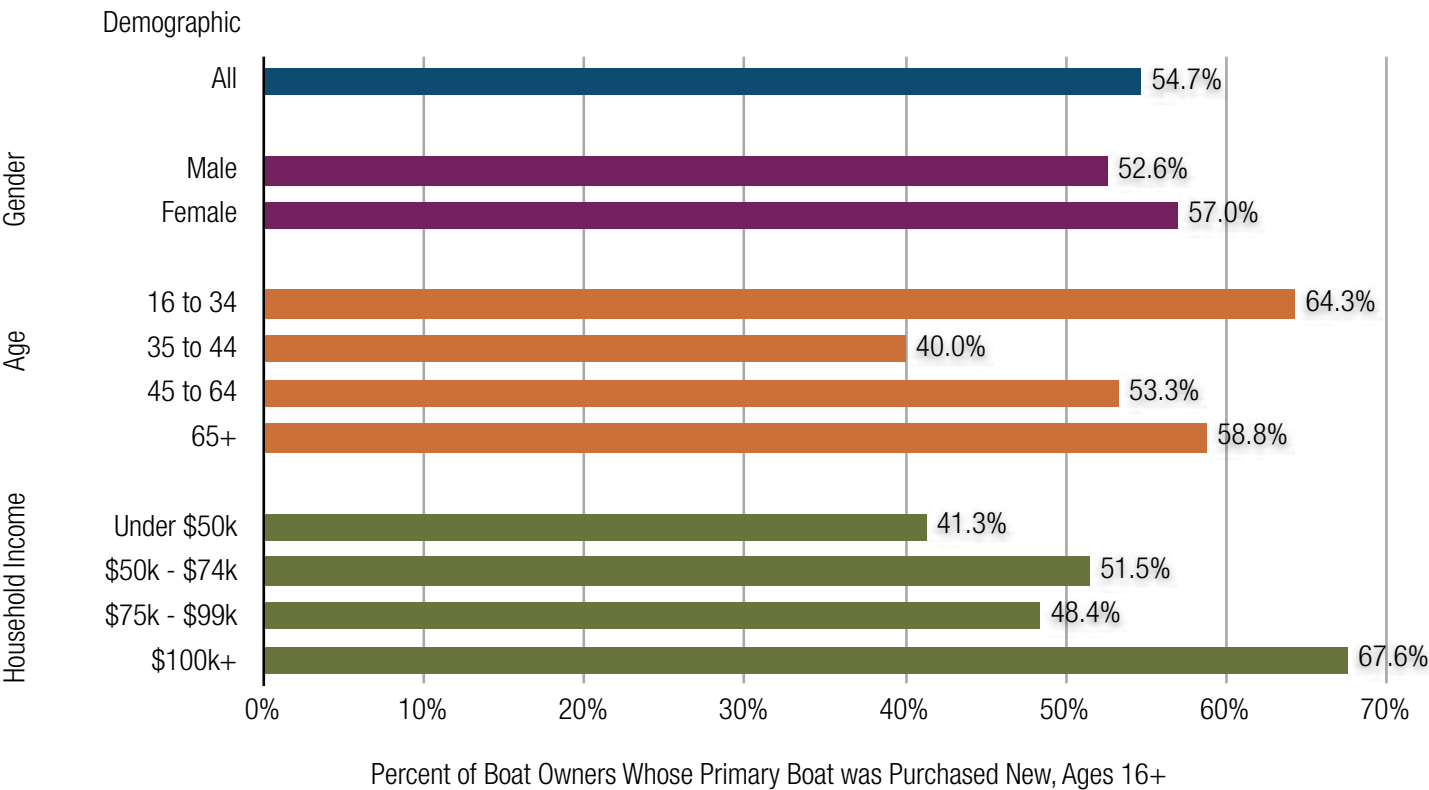
Boat Ownership by Boat Type



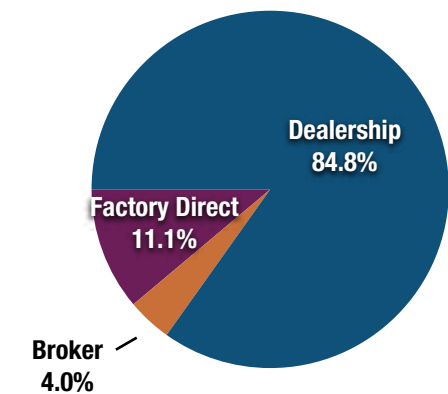
Percentage of Boat Owners, All Americans, 16+

New and Used Boat Ownership

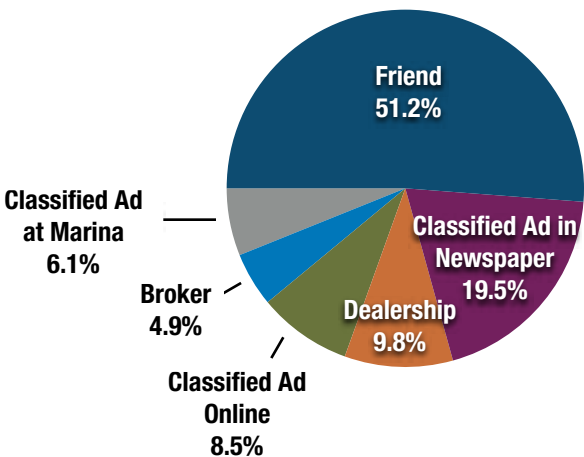
Individuals who Purchased their Boat New



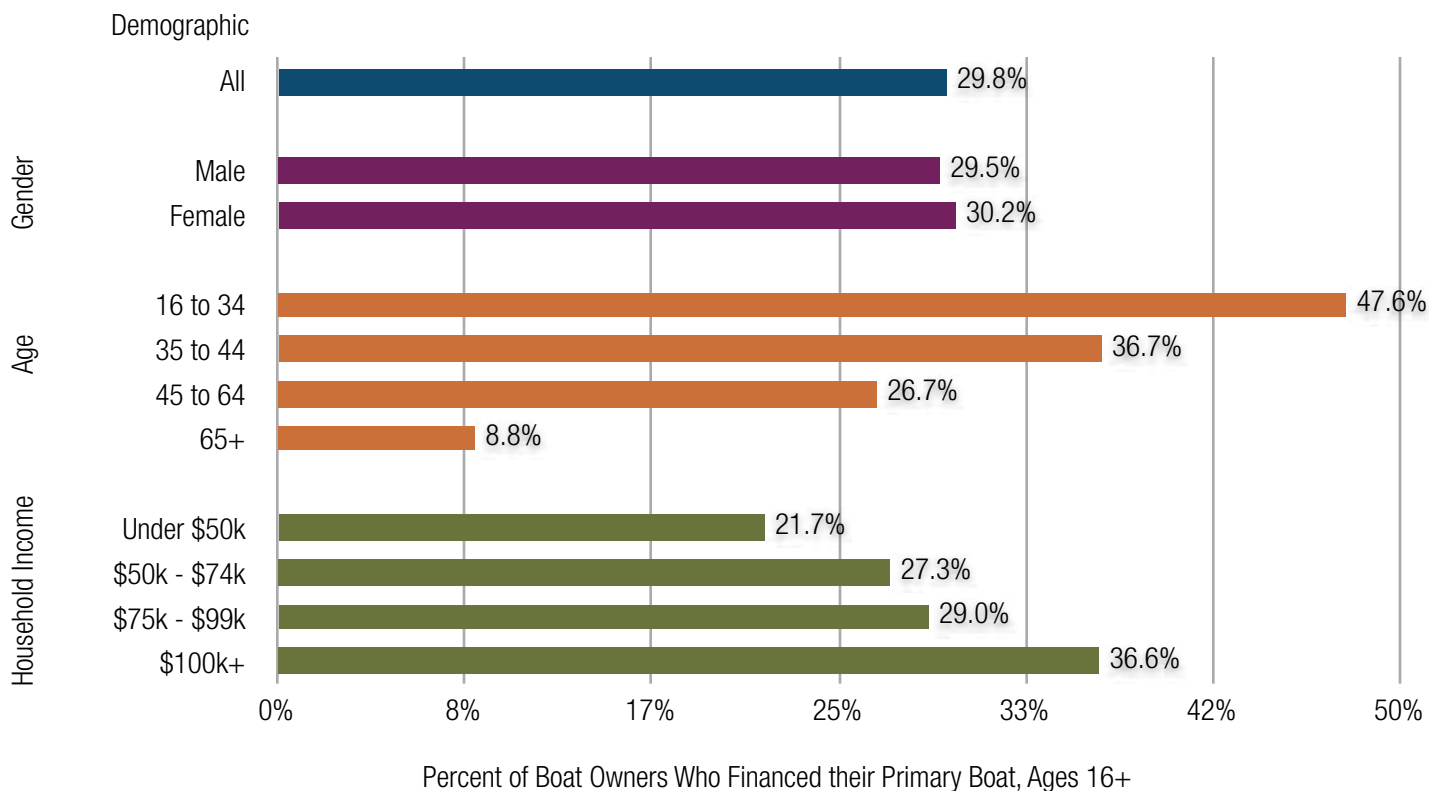
Where did you buy your new boat?



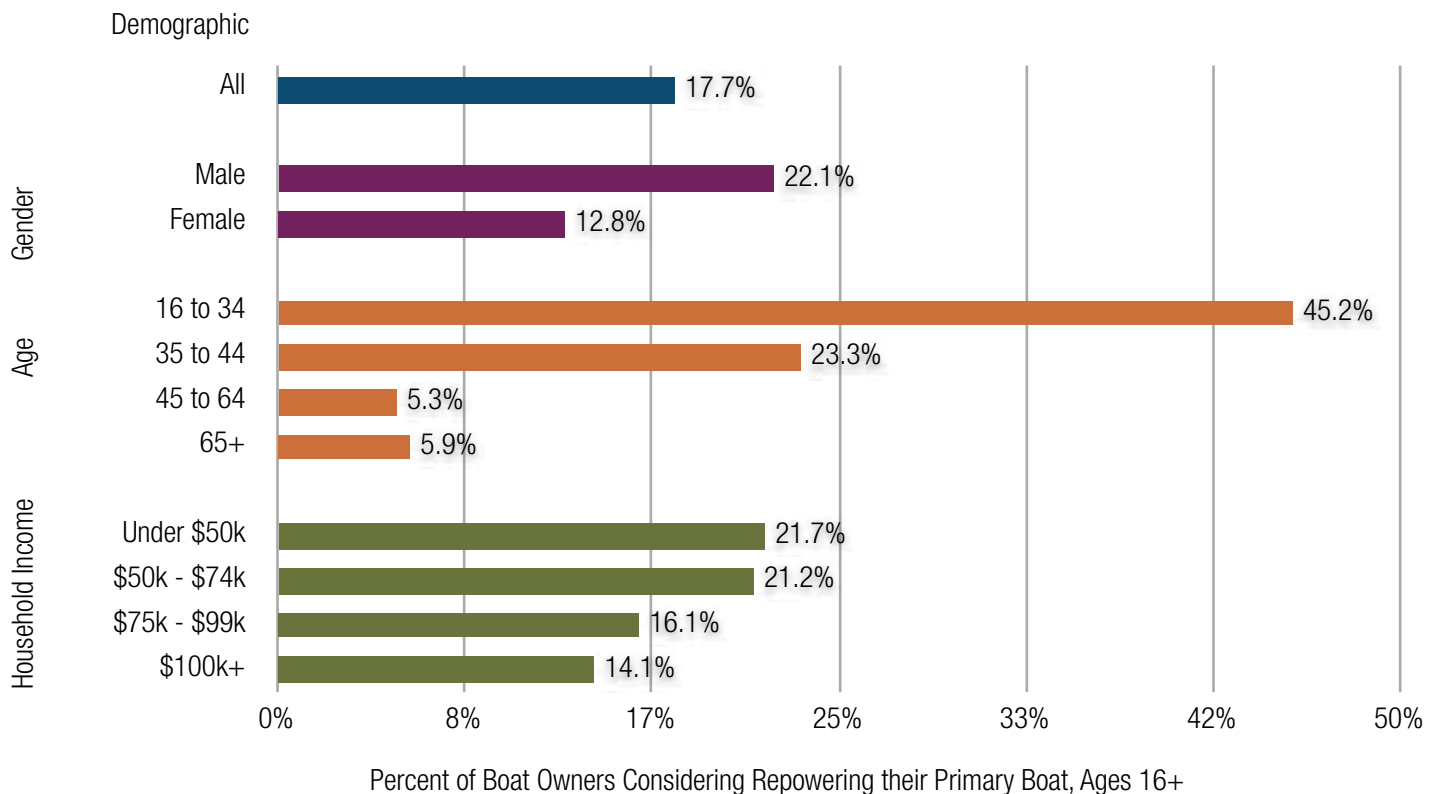
Where did you buy your used boat?



Individuals who Financed their Boat



Individuals Considering Repowering their Boat Next Year



New and Used Boat Ownership

Where is your boat stored in season?

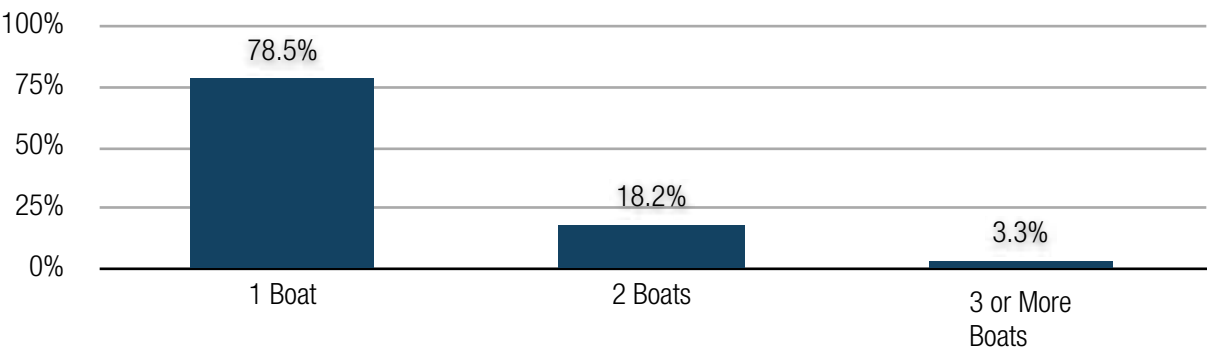
Boat Owners, Ages 16+	
On a trailer at my primary residence	60.8%
On a trailer at a storage facility/marina	12.7%
In the water at a private dock at my primary residence	11.0%
In the water at a private dock at a secondary residence less than one hour from my primary residence	6.6%
In the water at a private dock at a secondary residence one to three hours from my primary residence	2.2%
In the water at a private dock at a secondary residence over 3 hours from my primary residence	3.3%
In the water at a marina less than one hour from my primary residence	6.6%
In the water at a marina one to three hours from my primary residence	2.8%
In the water at a marina over 3 hours from my primary residence	0.6%
Somewhere else	12.7%

How much money did you spend on boating, including fuel, finance payments, accessories, maintenance, repair and upgrades in 2010?

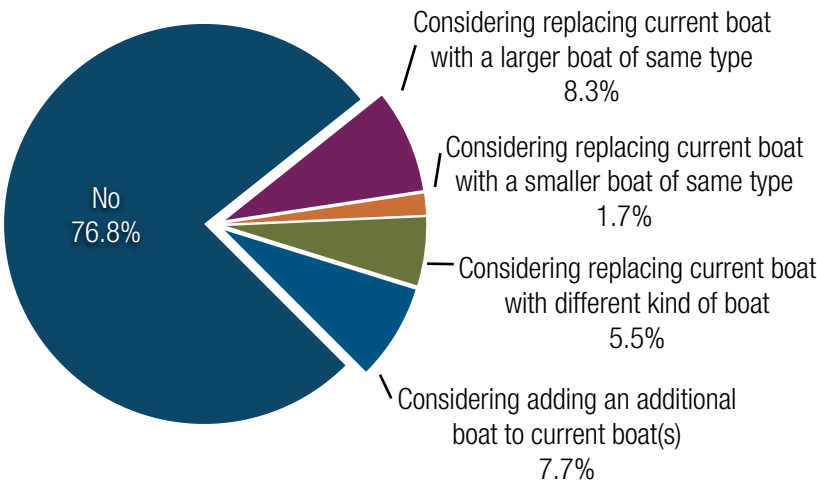
Boat Owners, Ages 16+	
Under \$500	42.5%
\$500 to \$999	16.0%
\$1,000 to \$1,999	17.7%
\$2,000 to \$4,999	11.0%
Over \$5,000	12.7%

Expanding Fleets

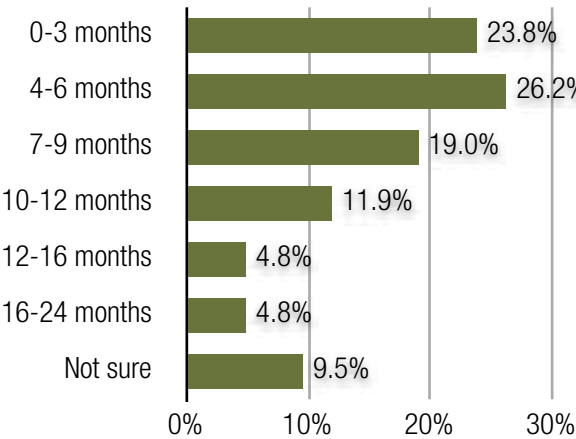
How many boats do you own?



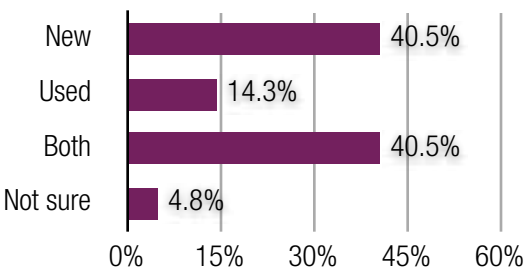
Are you considering another boat?



How soon are you considering making your purchase?



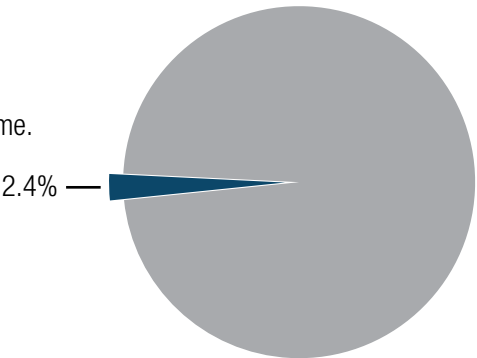
Are you considering a new or used boat?



Considering Boat Ownership for the First Time

Ages 16+

2.4% of Americans who are considering boat ownership for the first time.

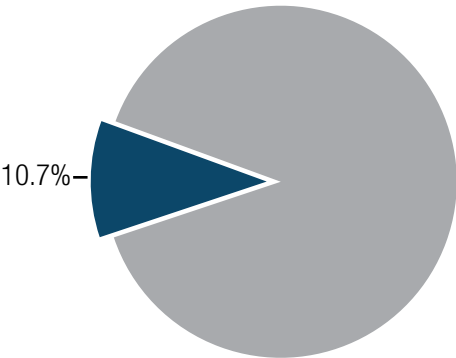


All Americans, Ages 16+,
Who Never Owned a Boat

Previous Boat Owners Considering Boat Ownership

Ages 16+

10.7% of previous boat owners who are considering boat ownership.



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

Why do you no longer own a boat?





BOATING PARTICIPATION

The number of Americans participating in boating increased from 50.4 million in 2009 to 51.4 in 2010. The average number of outings declined slightly, reducing total boating days from 705 million in 2009 to 676 million in 2010.

In the last 12 months, most (22.6 percent) of boating participants went out on the water in deck/pontoon boats. This is followed closely by kayaks/canoes (20.9 percent) and bass boats (20.2 percent).

Boating participants spent an average of 13 days on the water. Males averaged slightly higher at 14 days, and those earning \$50,000 to \$74,000 averaged 16 days.

Most boating participants enjoyed outings with friends at 61.7 percent, and most outings were taken in freshwater at 61.7 percent. Almost 21 percent of boating participants rented or chartered a boat on vacation.

61.7%

The percentage of boating participants who go out on the water with friends.

22.6%

The percentage of boating participants that go out on the water in deck/pontoon boats.

Boating Participation

18.1%

Percentage of Americans ages six and older who went boating in 2010
(51.4 million participants)

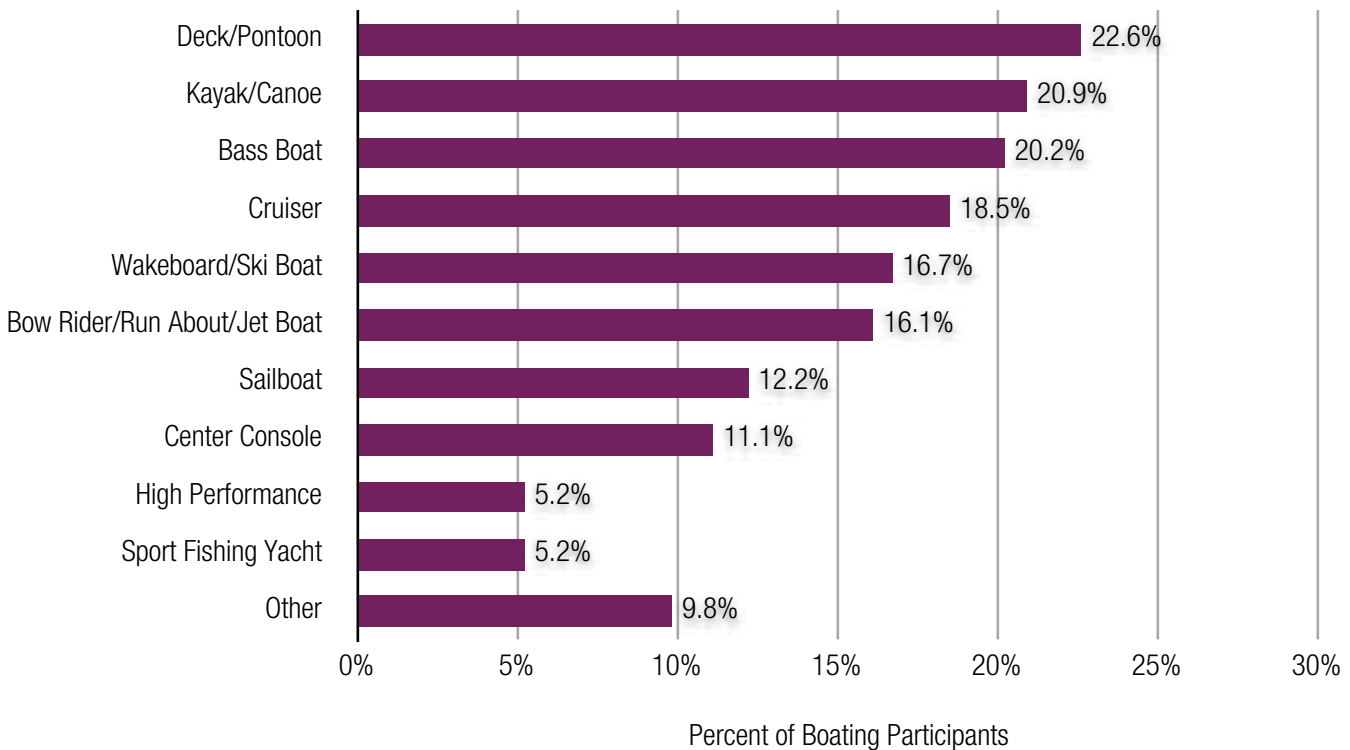
675.9M

Projected number of boating outings made by Americans ages six and older in 2010

The overall boating ownership rates above are calculated from the main participation study, which uses the total population ages six and older.

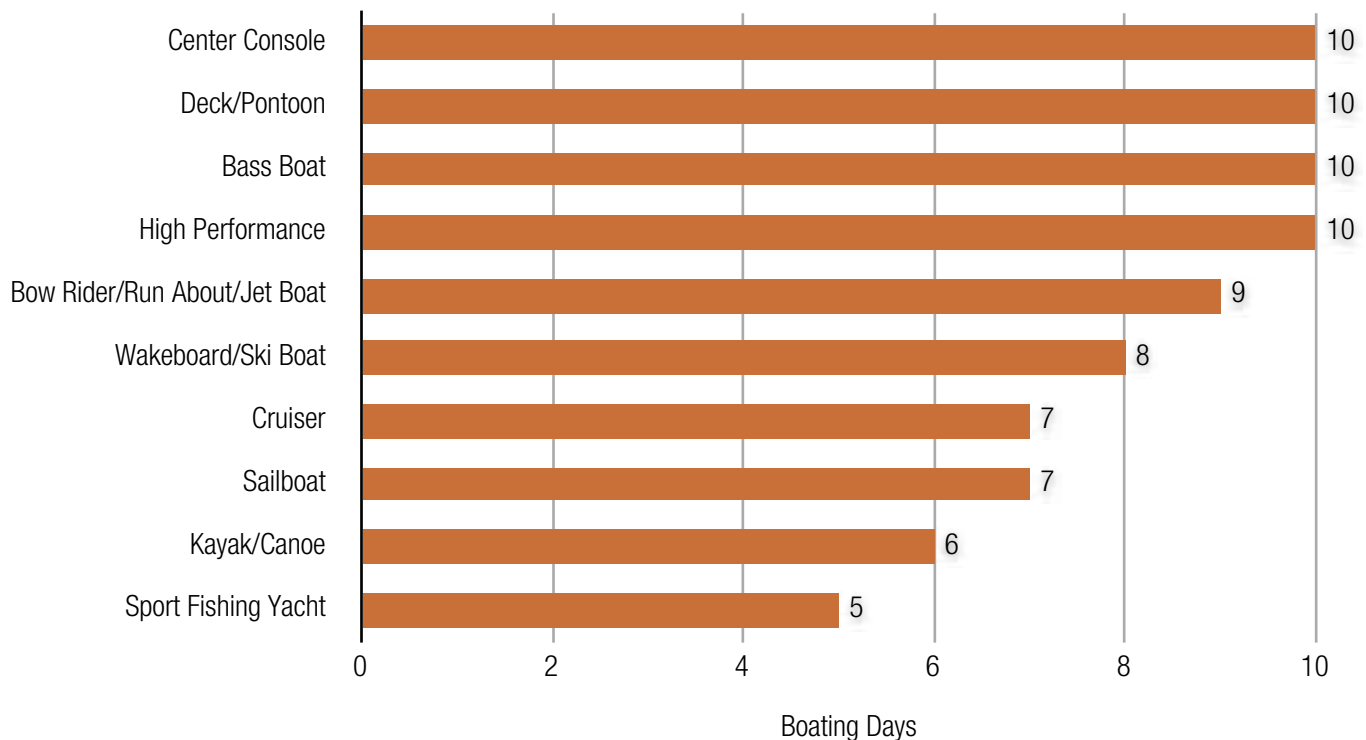
On What Type of Boat do Participants Go Out on the Water?

Ages 16+ in Last 12 Months



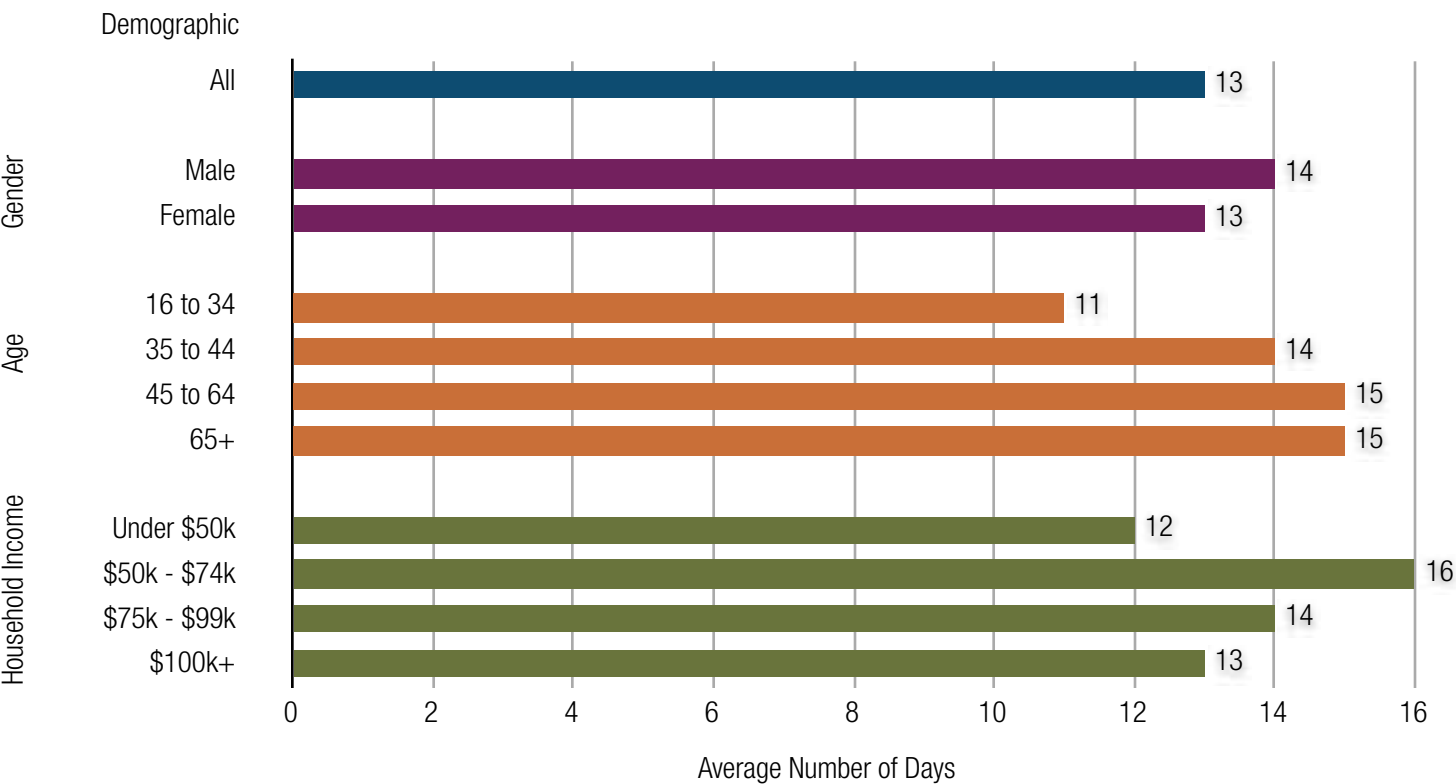
Average Annual Boating Days by Boat Type

Among Boating Participants, Ages 16+



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

Among Boating Participants, Ages 16+



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).

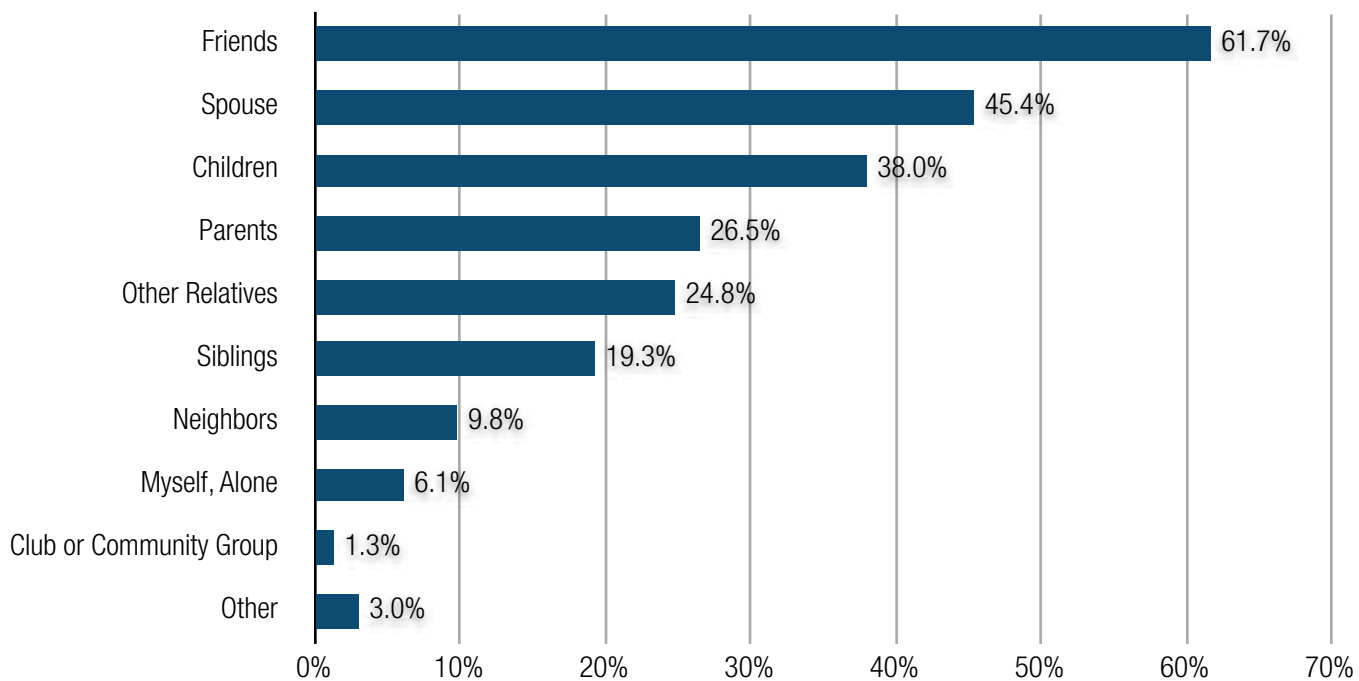
Percentage of Boating Participants Who Personally Commanded or Operated a Boat by Type Ages 16+

	All	Males	Females
Kayak/Canoe	93.8%	100.0%	87.2%
Sailboat	62.5%	72.4%	51.9%
High Performance	58.3%	76.5%	14.3%
Cruiser	50.6%	71.7%	15.6%
Bass Boat	48.4%	61.7%	24.2%
Bow Rider/Run Abouts/Jet	47.3%	66.7%	21.9%
Center Console	43.1%	51.9%	33.3%
Wakeboard/Ski Boat	42.9%	57.5%	27.0%
Deck/Pontoon	40.4%	57.7%	23.1%
Sport Fishing Yacht	29.2%	35.3%	14.3%
Other	42.2%	60.0%	28.0%



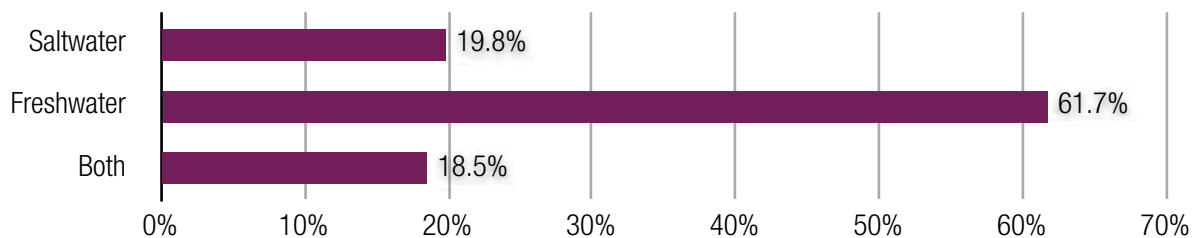
Boating Companions

Among Boating Participants, Ages 16+



Boating Water Types

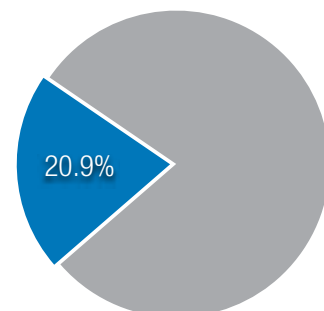
Among Boating Participants, Ages 16+



Vacation Charters/Rentals

Among Boating Participants, Ages 16+

20.9% of boating participants rented or chartered a boat while on vacation in 2010.





BOATING ACTIVITIES

In 2010, Americans enjoyed a variety of activities while boating—from waterskiing to fishing to sunbathing. Males preferred to fish while boating with 63.2 percent participating at least once in 2010, while women preferred cruising with 64.7 percent participating.

Men and women boaters spent an average of eight days fishing from a boat. Other popular boating activities included sunbathing, entertaining/socializing and kneeboarding.

Fishing

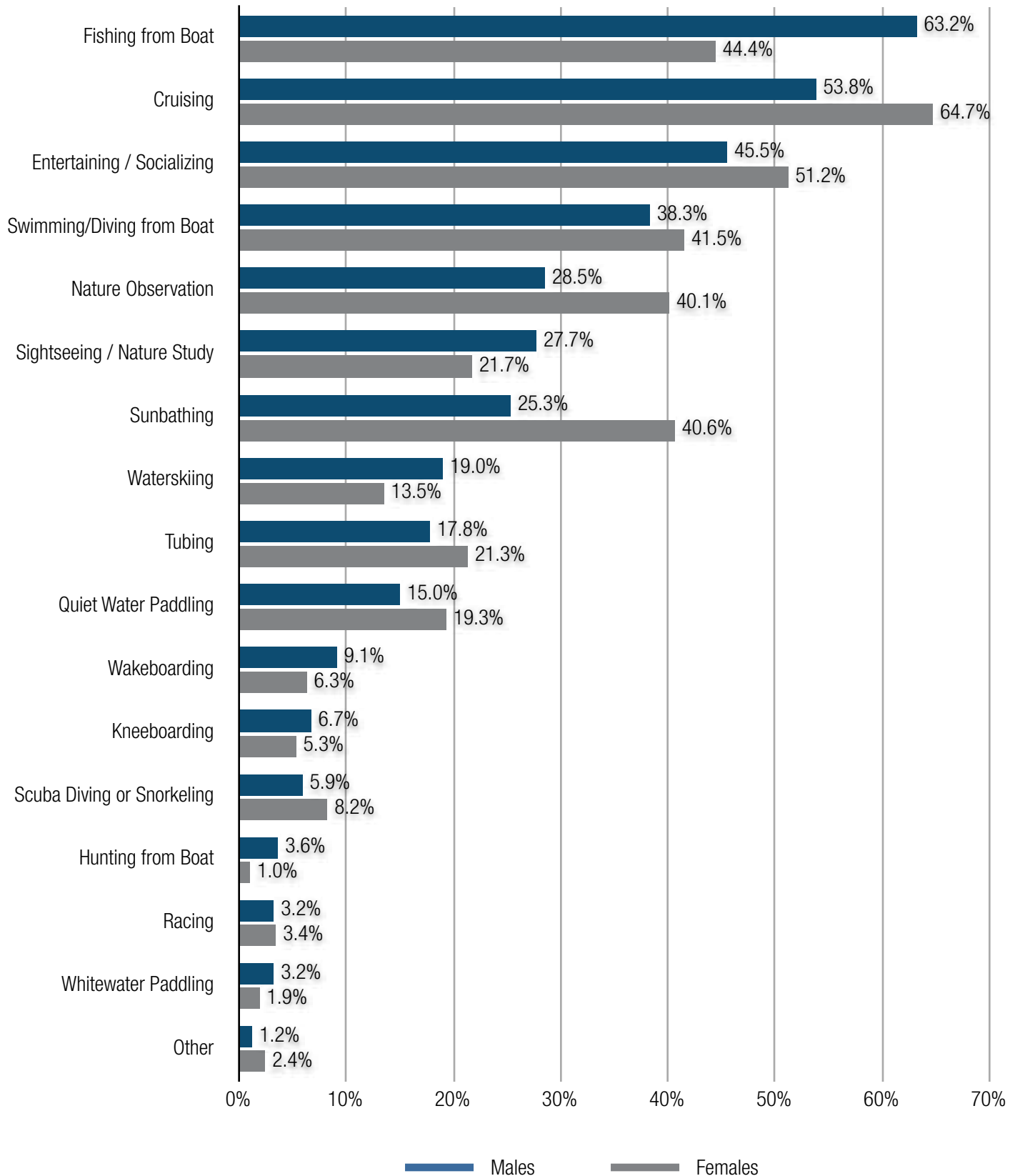
Fishing from a boat is the most popular boating activity among males over the age of 16.

64.7%

The percent of female boating participants who went cruising in 2010.

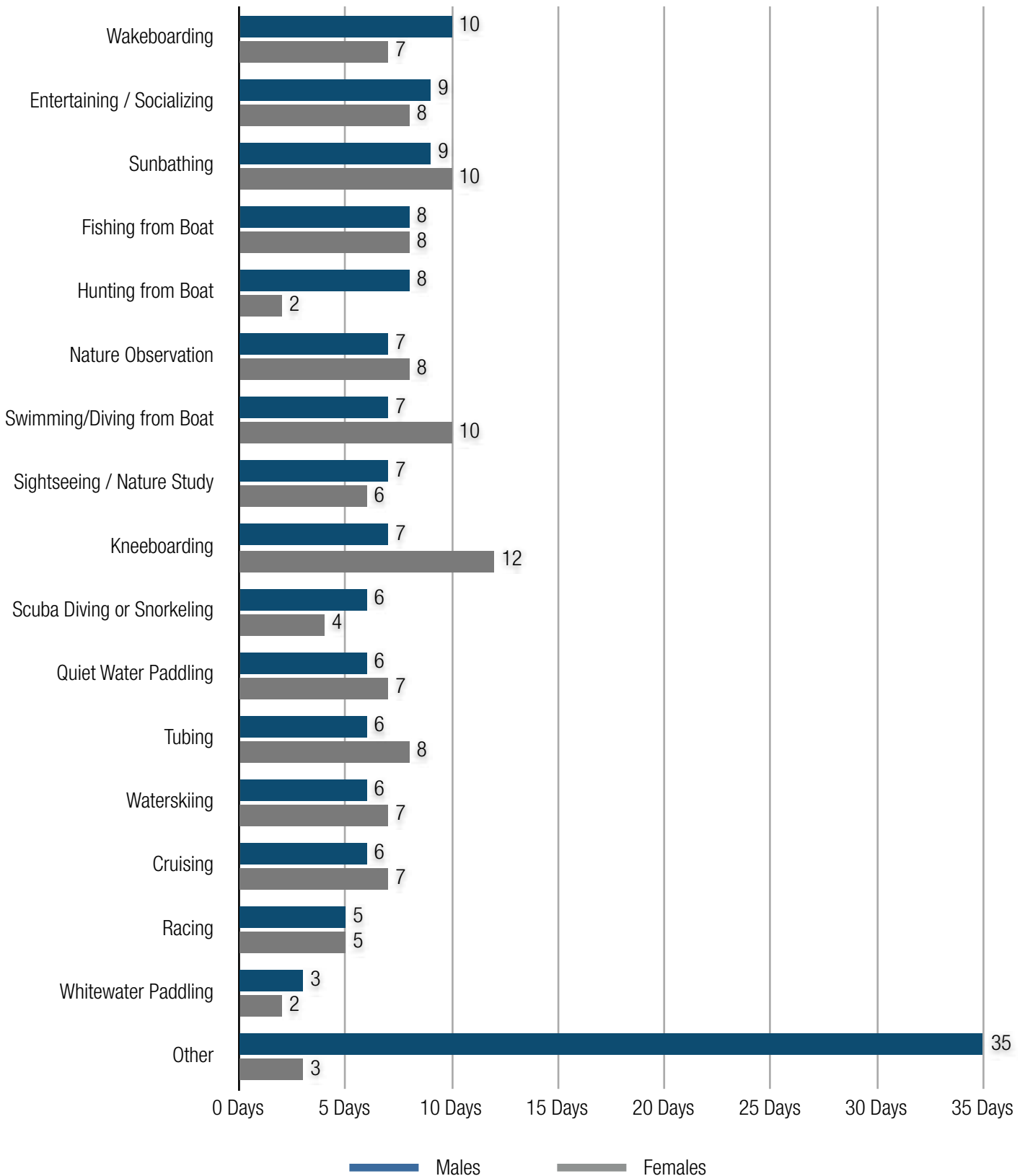
Participation in Boating Activities

Among Boating Participants, Ages 16+



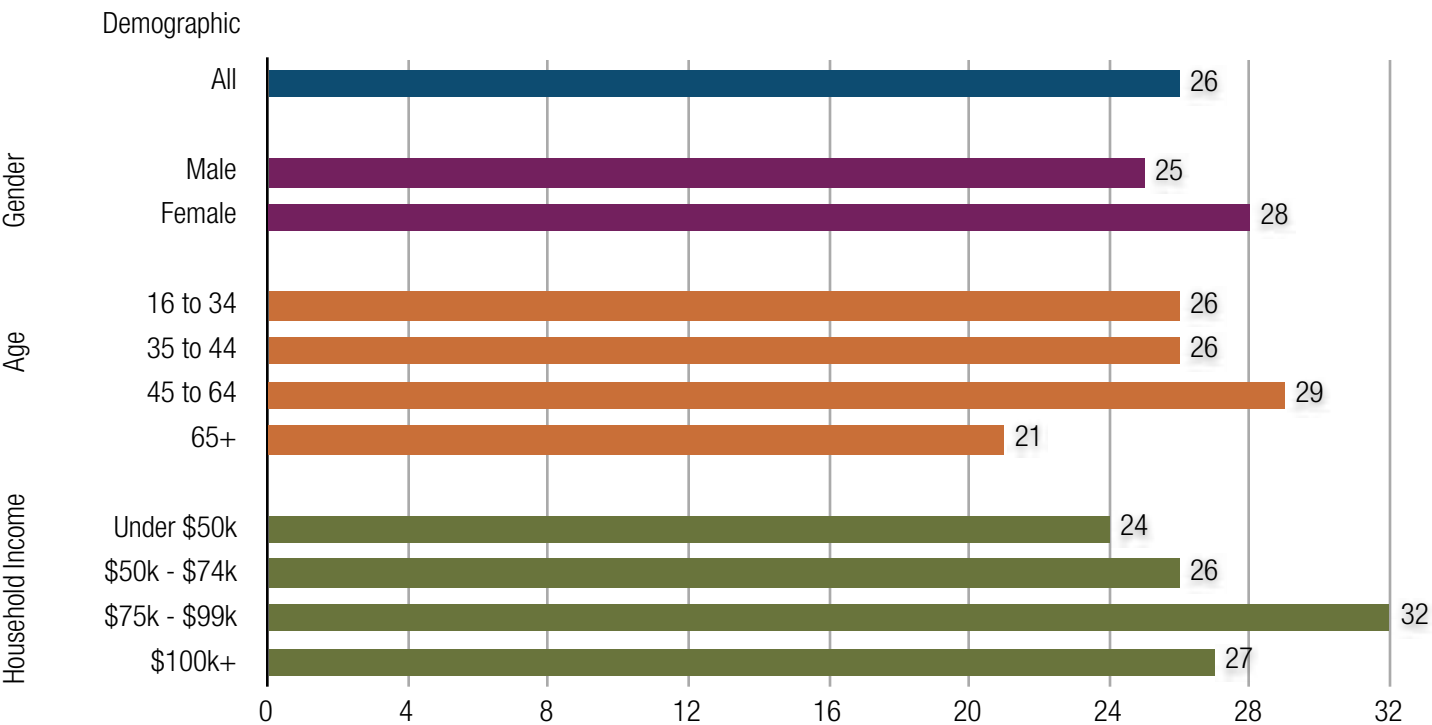
Average Number of Annual Boating Activity Days

Among Boating Participants, Ages 16+



Average Annual Participation in Boating Activities by Demographic

Among Boating Participants, Ages 16+



Fishing and Boating Outings

Ages 16+

	2010
Number of Boating Outings	560,154,031
Number of Fishing Outings	808,181,000
Number of Fishing Outings from a Boat	169,723,428
Percentage of Boating Outings with Fishing	30.3%
Percentage of Fishing Outings that were on a Boat	21.0%
Percentage of Fishing Participants who Fished from a Boat at least Once in 2010	55.1%



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