

SPECIAL REPORT ON FISHING AND BOATING 2013



A PARTNERSHIP
PROJECT OF:



RECREATIONAL
BOATING & FISHING
FOUNDATION



OUTDOOR
FOUNDATION™

CONTENTS

Executive Summary	1
Fishing	3
Freshwater Fishing	17
Saltwater Fishing	21
Fly Fishing	25
Youth, A Focused Look	29
Hispanics, A Focused Look	35
Boat Ownership	41
Boating Participation	51
Boating Activities	55
Method	61



Recreational Boating & Fishing Foundation

500 Montgomery Street, Suite 300

Alexandria, VA 22314

www.TakeMeFishing.org

The Outdoor Foundation

4909 Pearl East Circle, Suite 300

Boulder, CO 80301

www.outdoorfoundation.org

® Recreational Boating & Fishing Foundation and Recreational Boating & Fishing Foundation logo are registered trademarks of Recreational Boating & Fishing Foundation.

® The Outdoor Foundation and The Outdoor Foundation logo are registered trademarks of The Outdoor Foundation.

© 2013, All Rights Reserved



2013 Special Report on Fishing and Boating

Executive Summary

Recreational boating and fishing are cornerstones of the American outdoor experience. The accessibility of fishing and the draw of the water lead many Americans to make boating and fishing an integral part of their recreational plans.

Fishing — on lakes, streams, rivers and seas — is one of the most popular outdoor activities. As a “gateway activity,” it not only connects Americans with the outdoors and a healthy lifestyle, but also introduces them to other outdoor activities. As active outdoor participants, Americans learn the value of environmental stewardship and a healthy connection to nature, while also supporting public lands and community programs nationwide through license fees and fishing-related excise taxes.

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

Fishing Participation Trends and Opportunities

Forty-seven million Americans participated in fishing in 2012, making one billion annual outings or 21.3 outings each on average, up from 18.2 average outings in 2011. This equates to a participation rate of 16.4 percent of Americans ages six and older.

For the second year in a row, fishing added a significant number of new participants, growing by more than

800,000 Americans in 2012. In addition to boosting participation numbers, the influx of new participants continues to bring greater gender diversity to the sport, which is historically male-dominated. A disproportionately high number of new participants in 2012 were female, ages six to 12 and ages 25 to 44.

And while the diversity of new fishing participants is improving, the diversity of future participants — those non-participants interested in trying fishing — is even better. Though just fewer than two-thirds of current fishing participants are male, females represent more than 46 percent of those interested in trying fishing. Similarly, the ethnic diversity of those interested in fishing is also richer than the current fishing population. Nearly 27 percent of potential participants are ethnically diverse, while 21.8 percent of current participants are diverse.

The fastest growing United States population segment, Hispanic Americans, represent an extraordinary opportunity for the future of fishing. While Hispanic Americans made up only 5.6 percent of fishing participants in 2012, their percentage of the American population was far higher. While 8.8 percent of Americans who don't participate in fishing are interested in trying the sport, a slightly lower percentage of Hispanics, 7.2 percent, are considering fishing. Of these, 69.5 percent are male and 42.2 percent are ages 25 to 44. The highest concentration of current Hispanic fishing participants is in the West South Central region of the U.S., which includes Texas, Louisiana, Arkansas and Oklahoma.

Freshwater fishing is, by far, the most popular type of fishing. Freshwater fishing has significantly more participants than saltwater and fly fishing, and freshwater participants make more outings annually, on average. One

in five youth ages six to 12 participate in freshwater fishing, and youth and young adults ages six to 24 make up nearly a third of freshwater fishing participants.

Saltwater fishing is the second most popular type of fishing, but with only 12.0 million participants versus freshwater fishing's 39.1 million participants. In 2012, 12.5 percent of saltwater fishing participants were first-time participants, up from 8.4 percent first-time participants in 2011.

Fly fishing participation grew in 2012 to 6.0 million participants from 5.7 million participants the year before. Much of the participation growth was driven by first-time participants who made up 20.5 percent of all fly fishing participants, up from 14.4 percent in 2011.

Boating Participation Trends and Opportunities

The connection between fishing and boating is clear through the habits of fishing participants. In 2012, 48 percent of fishing participants fished from a boat at least once, and 58.1 percent of boating outings involved fishing, up from 37.8 percent of outings in 2011.

More than 16 percent of Americans ages six and older participated in boating in 2012, making 805.5 million boating outings. On average, boating participants made 17.2 outings in 2012, up from 14.2 in 2011 and 13.2 in 2010. Participants most commonly got out on pontoon boats, kayaks, canoes and row boats.

Boat ownership was down slightly from 22.6 million owners in 2011 to 21.2 million in 2012, but an additional 14.4 million Americans were considering boat ownership in 2012. Boat ownership rates rise as household income increases, and two-thirds of boat owners own one boat. The percentage of boat owners who own a kayak or canoe increased significantly from 12.1 percent in 2011 to 20.7 percent in 2012. Nearly six percent of Americans ages 16 and older were considering a purchase last year, up from 3.8 percent in 2011 and 3.6 percent in 2010.

The social aspects of boating provide an excellent opportunity for engaging new boat owners and boating participants. Over 60 percent of boating participants share their time on the water with friends, and the most popular boating activities are perfect for groups. Cruising, entertaining, fishing and nature observation are popular activities among females, and fishing, cruising, swimming and entertaining are popular activities among males.

The growth in fishing and continued interest in boating and boat ownership in the U.S. are promising trends and strong indicators for their future health. Outreach programs targeting growing and underrepresented demographics will only help increase future generations of enthusiasts and foster stronger connections between Americans, the outdoors and healthy lifestyles.

FISHING

Forty-seven million Americans participated in fishing in 2012, and, for the second year in a row, the sport added nearly 800,000 or more new participants, pushing participation among ages six and older to 16.4 percent.

Participants made one billion fishing outings in 2012, averaging 21.3 days per participant. Freshwater fishing remained the most popular type of fishing, contributing 667 million of the year's outings. Most outings took place on boats, shorelines and riverbanks.

Fishing participation trends higher among males, adults with children in their household and younger age groups. As with many outdoor activities, minorities and females are underrepresented, though in 2012, 41 percent of first-time fishing participants were female, while only 34 percent of existing participants were female.



47 Million

47 million Americans participated in fishing in 2012, up from 46.2 million in 2011.



1 Billion

Fishing participants made one billion outings in 2012.



41% Females

Forty-one percent of first-time fishing participants are female.

Total Participation

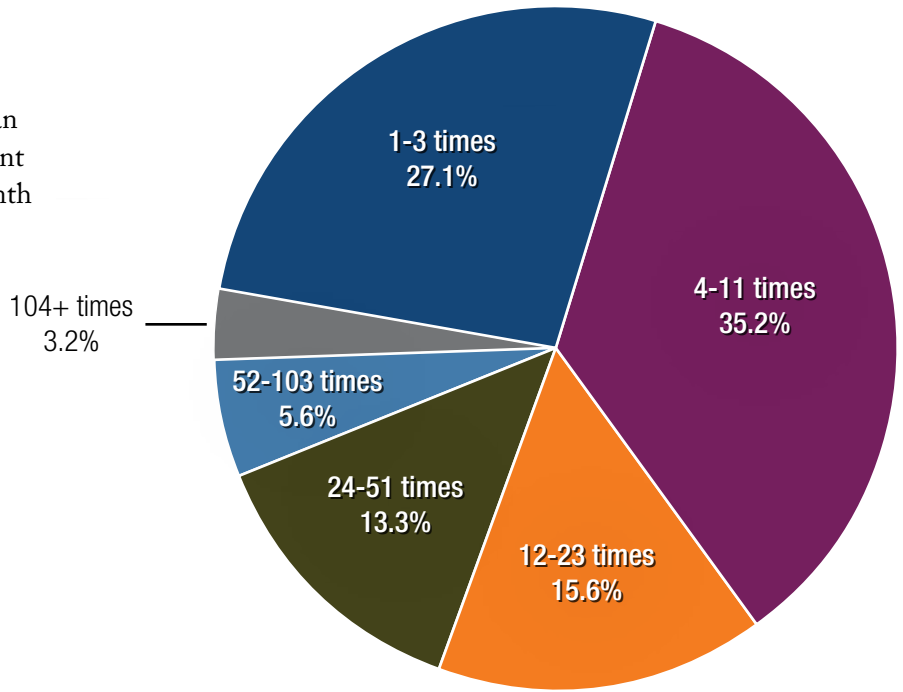
2006	49.7 million participants 18.3 percent of Americans ages 6+
2007	51.8 million participants 18.7 percent of Americans ages 6+
2008	48.2 million participants 17.2 percent of Americans ages 6+
2009	48.0 million participants 17.0 percent of Americans ages 6+
2010	45.4 million participants 16.0 percent of Americans ages 6+
2011	46.2 million participants 16.2 percent of Americans ages 6+
2012	47.0 million participants 16.4 percent of Americans ages 6+

Annual Outings

In 2012, fishing participants made one billion annual outings — either close to home or on an overnight trip. For some participants, this meant fishing once a week and for others, once a month or once a season.

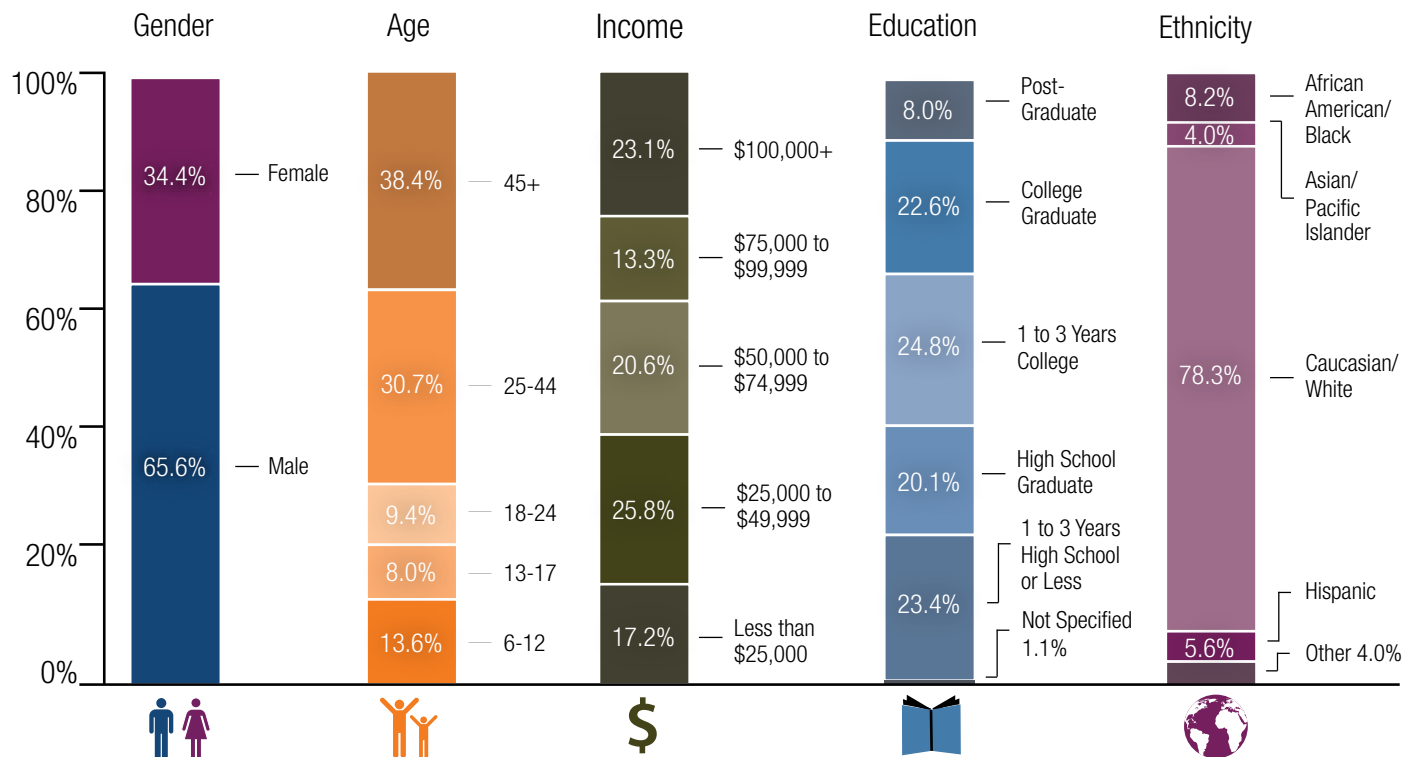
21.3 days

The average number of annual outings per fishing participant, up 17 percent from 18.2 days in 2011.



Annual Outings
Fishing Participants, Ages 6+

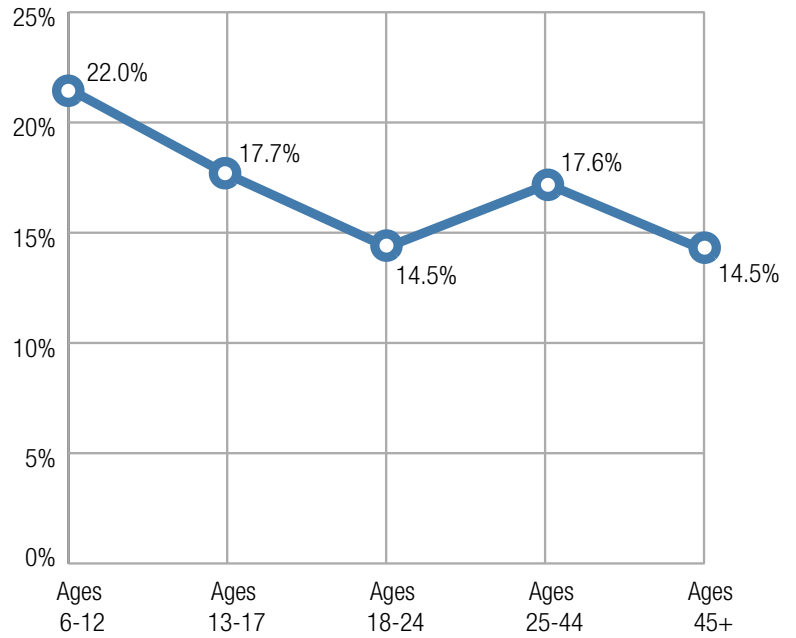
Demographics



Participation Life Cycle

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

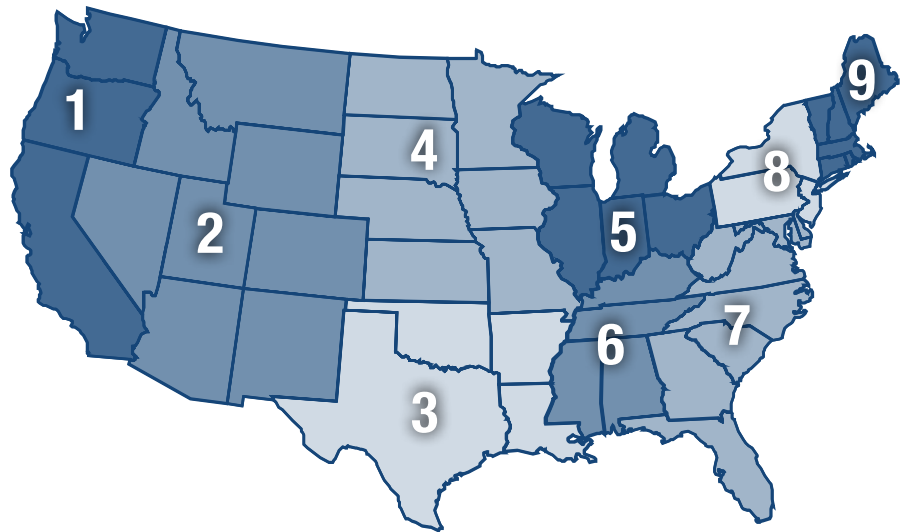
The life cycle of fishing participants is similar to those in other outdoor sports and activities. Although youth participation is initially high, it declines sharply during adolescence.



Geography of Participants

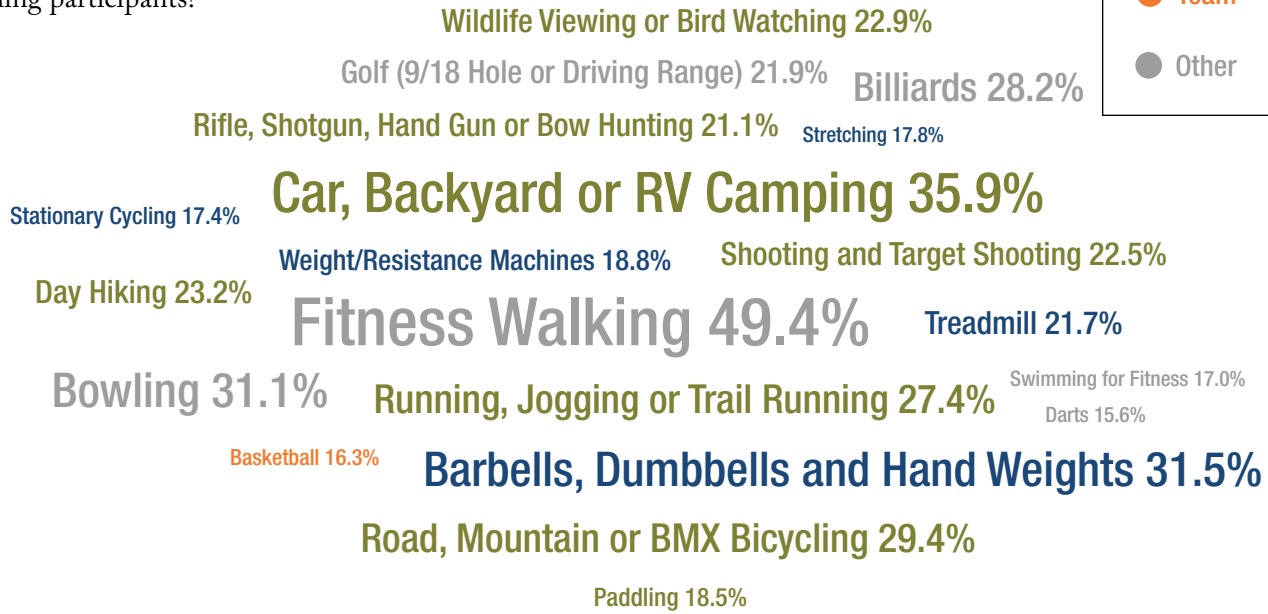
U.S. Census Regions

- 1. Pacific: **12.4%**
- 2. Mountain: **7.4%**
- 3. West South Central: **12.2%**
- 4. West North Central: **9.9%**
- 5. East North Central: **15.6%**
- 6. East South Central: **7.7%**
- 7. South Atlantic: **19.0%**
- 8. Middle Atlantic: **11.6%**
- 9. New England: **4.3%**



Crossover Participation

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



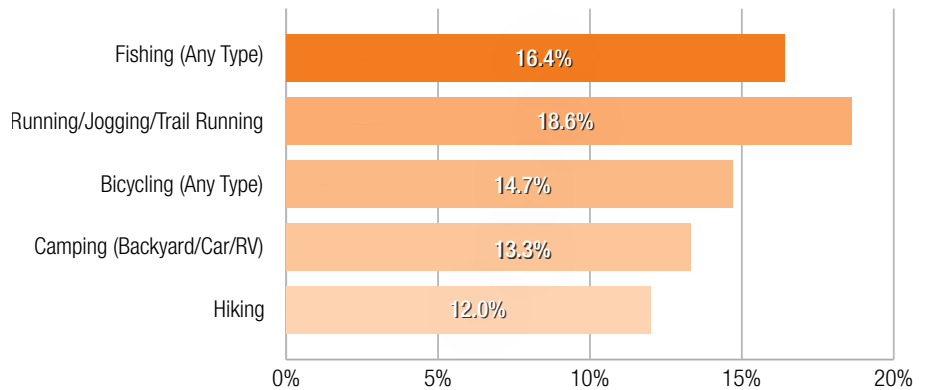
Note: Data includes top 20 most popular crossover activities.

Fishing: A Gateway to the Outdoors

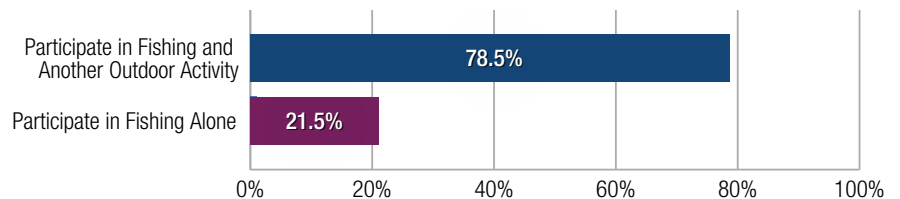
Outdoor participation often begins with one specific “gateway” activity. Accessible and popular, these pastimes often lead to participation in other outdoor endeavors. Running/jogging/trail running is the most popular gateway activity, with fishing coming in second.

A majority — 78.5 percent — of fishing participants participate in multiple outdoor activities. A small percentage participate in fishing alone.

Participation in the Gateway Activities



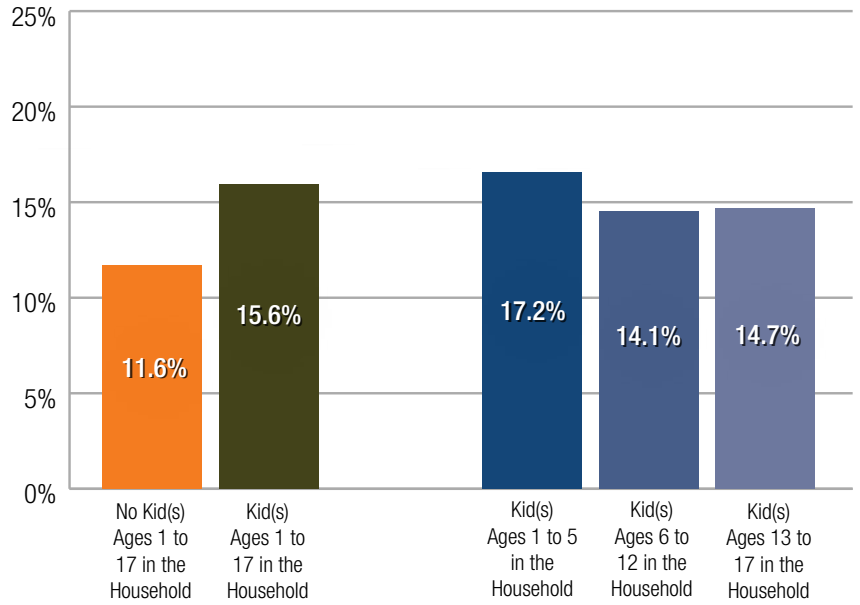
Fishing Participants: Outdoor Enthusiasts



Participation in Fishing Among Adults with Children

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

More than 15 percent of adults (ages 18 and older), with children ages one to 17 in their households participate in fishing, while only 11.6 percent of adults without children in their households participate.



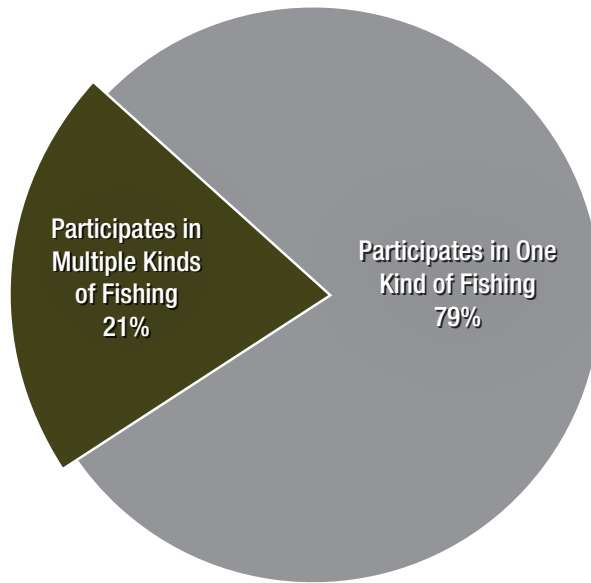
Top Fishing Venues

	Ages 6+
Shoreline	51.3%
Boat	46.0%
River Bank	44.1%
Pier/Jetty	26.5%
Kayak	3.6%
Other	6.0%



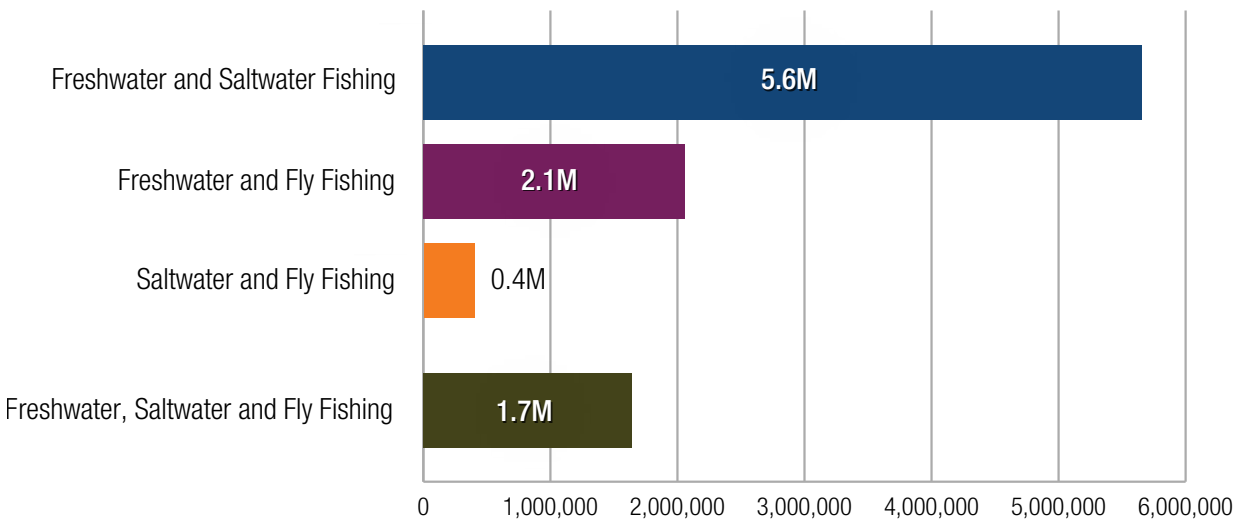
Overlap in Fishing Participation

A majority of America's fishing participants — 79 percent — participate in just one kind of fishing. Only 21 percent participate in multiple kinds of fishing.



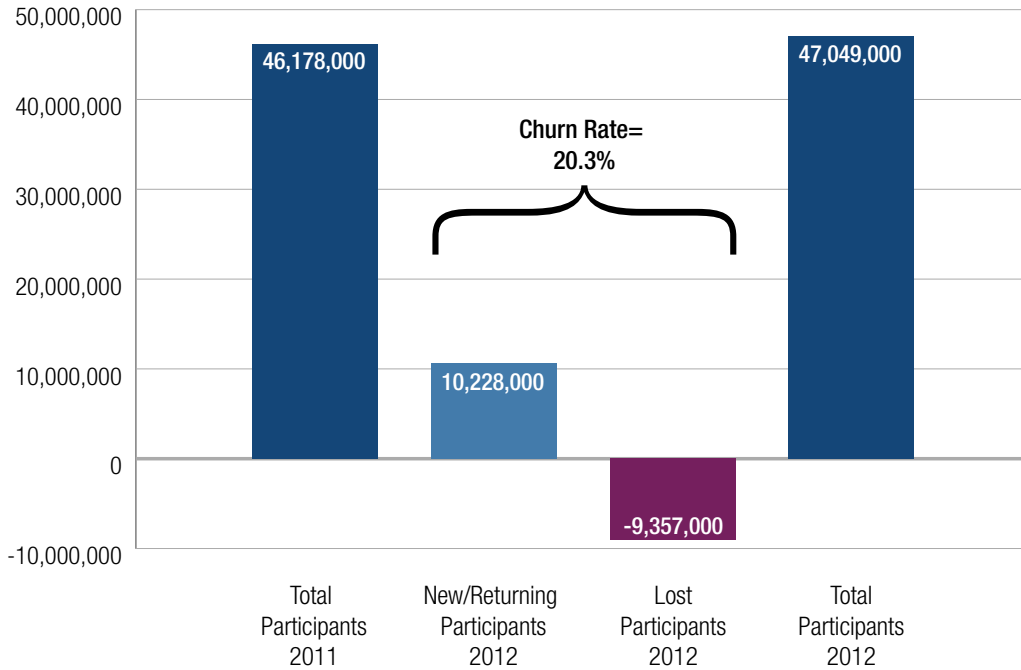
Participation Overlap by Fishing Type

The most common overlap in fishing participation is among fresh and saltwater fishing. 5.6 million participants fish in both fresh and saltwater. A dedicated few participate in all three types of fishing. Out of 47.0 million total fishing participants, 1.7 million participate in freshwater, saltwater and fly fishing.



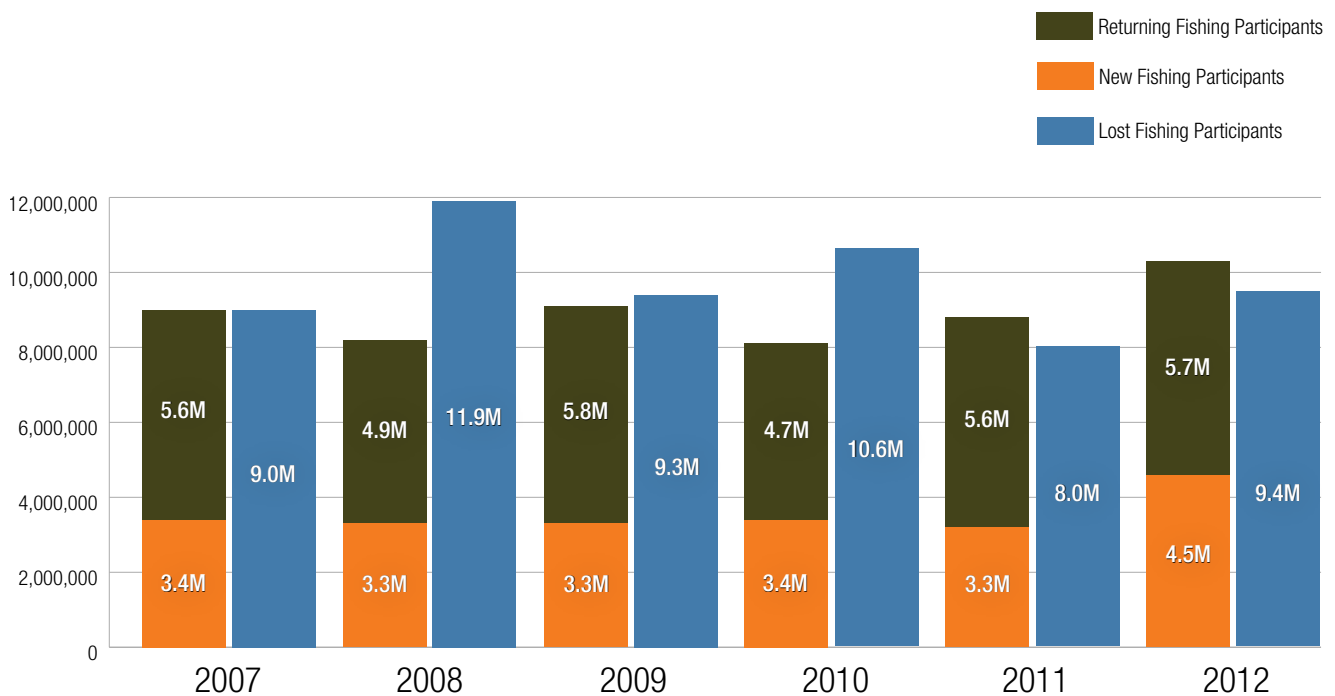
The Leaky Bucket

The “Leaky Bucket” analysis, one of the most interesting and important findings in this report, shows that fishing gained more participants than it lost in 2012. While 9.4 million participants stopped fishing, 10.2 million former participants or new participants joined the sport. This equates to a gain of more than 870,000 fishing participants and a churn rate of 20.3 percent.



Trends in “Lost” Participants

For the second year in a row, more participants joined or returned to fishing than left the activity. The addition of 871,000 participants in 2012 is up from 800,000 additional participants in 2011.

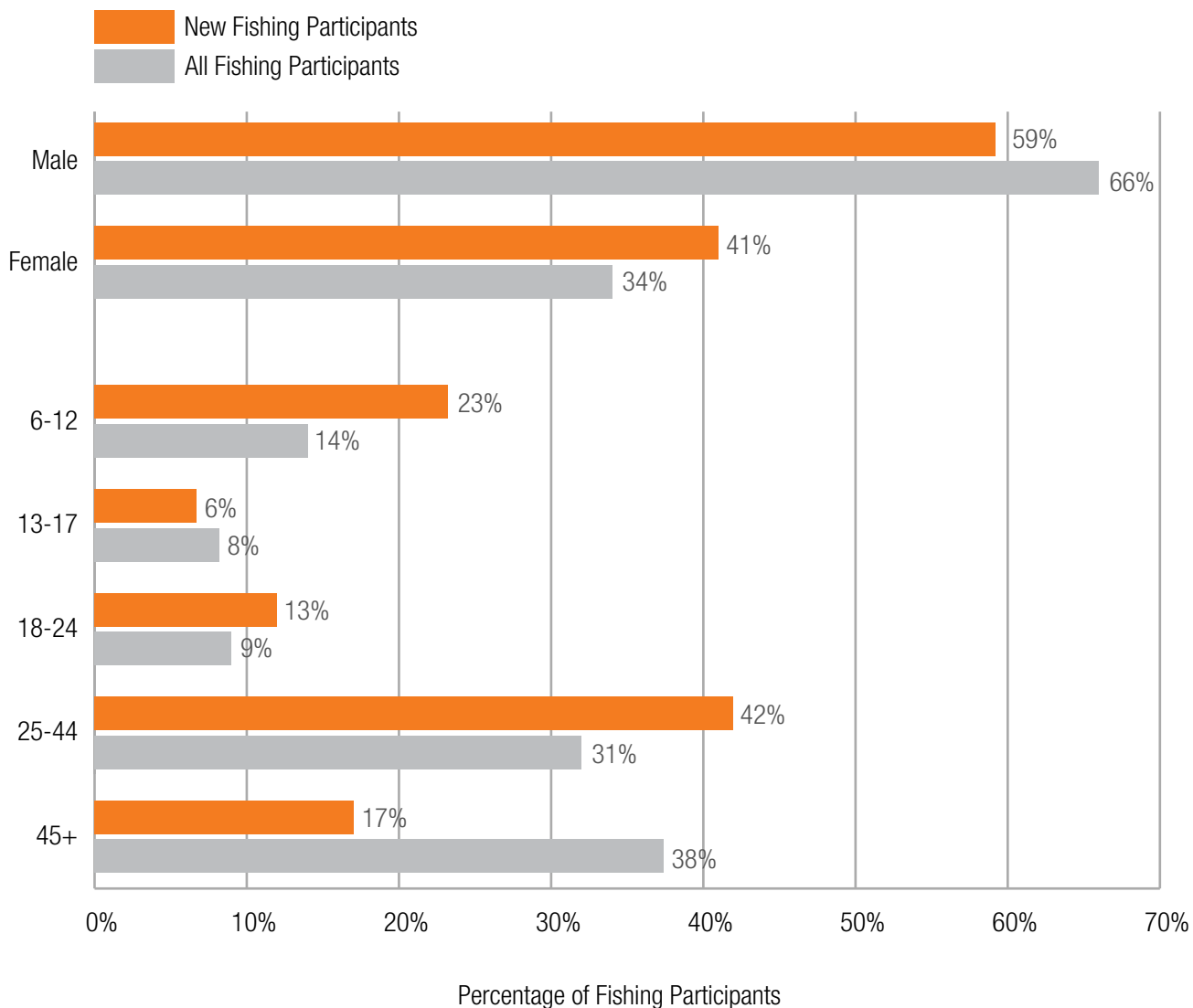


Who are the New Fishing Participants?

New fishing participants include higher percentages of females, ages six to 12 and ages 25 to 44. The sport of fishing is still male-dominated, but females are a growing group of fishing participants.

New Fishing Participants by Demographic

Ages 6+

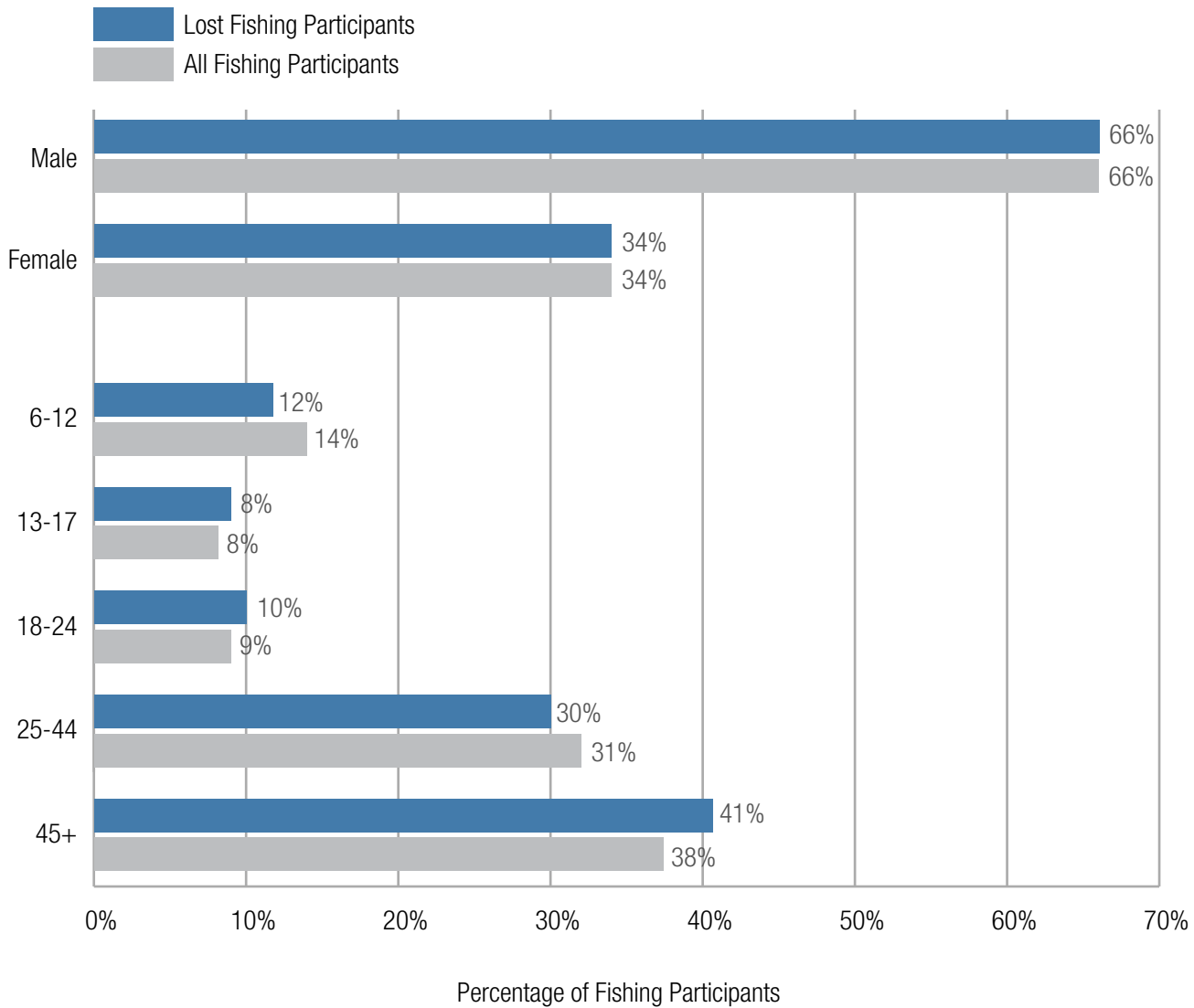


Who are the Lost Fishing Participants?

The profile of participants that decided to stop fishing is very similar to the profile of all fishing participants. Most are males age 45 and older.

Lost Fishing Participants by Demographic

Ages 6+

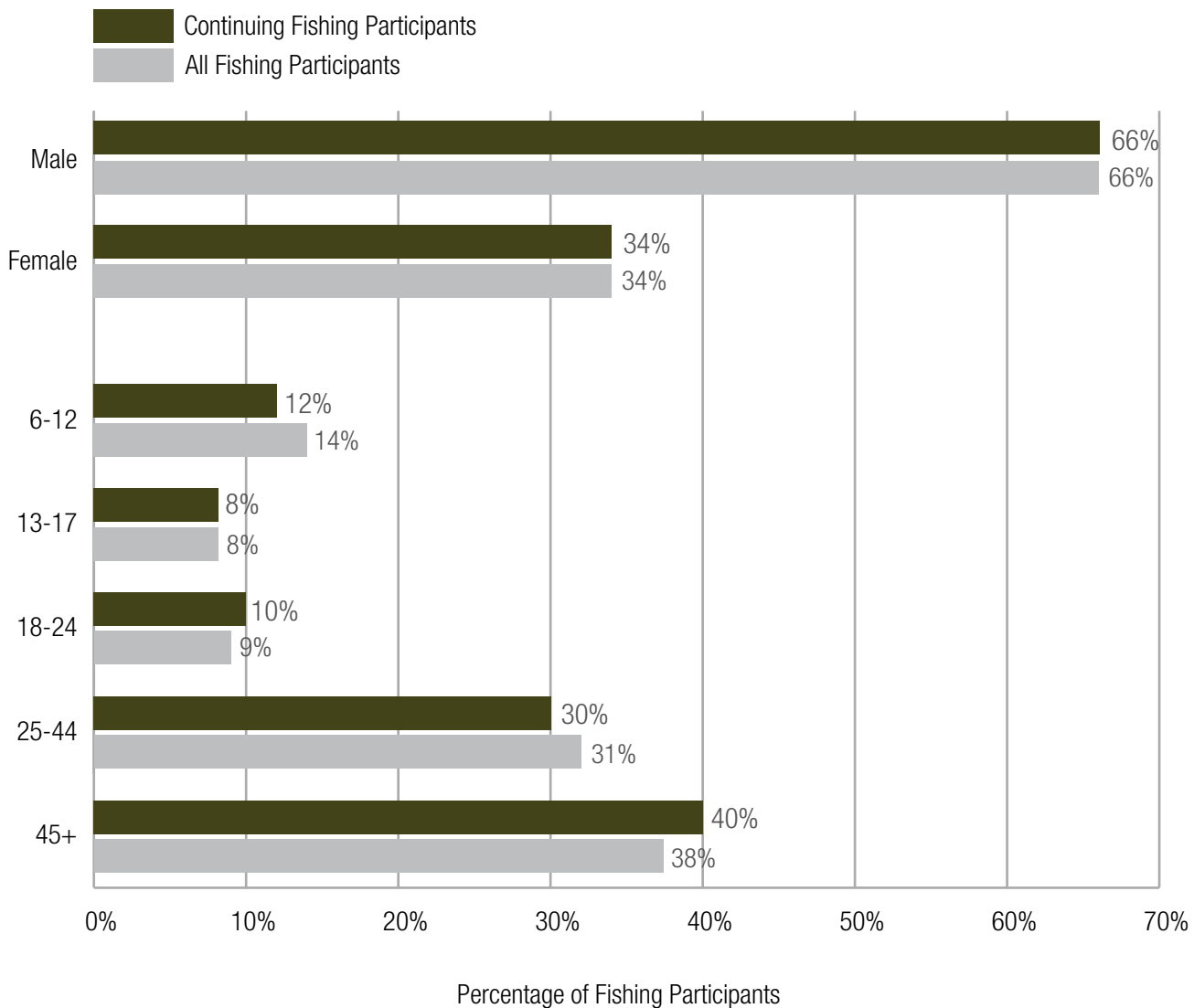


Who are the Continuing Fishing Participants?

As with lost fishing participants, the profile of continuing fishing participants is very similar to the profile of all fishing participants, with only small variations.

Continuing Fishing Participants by Demographic

Ages 6+





POTENTIAL NEW FISHING PARTICIPANTS

Almost nine percent of Americans who do not currently participate in fishing are considering taking up the sport. And while almost two-thirds of current fishing participants are male, females represent more than 46 percent of those interested in trying fishing. Similarly, the ethnic diversity of those interested in fishing is also richer than current fishing population. These demographics represent a favorable opportunity for the sport fishing in the coming years.

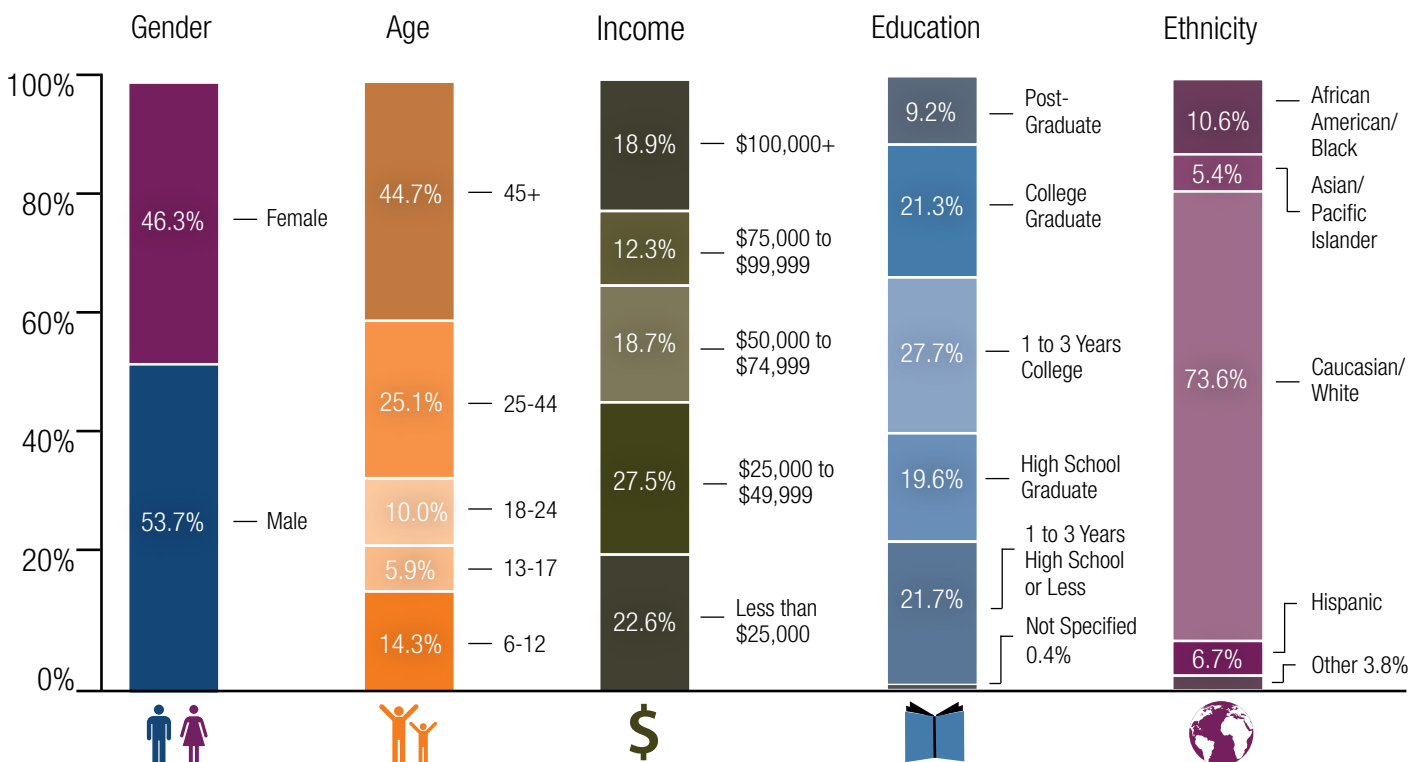
The following pages profile Americans, ages six and older, who do not currently fish but are interested in participating in the activity.



Females

46.3 percent of people considering fishing participation are female.

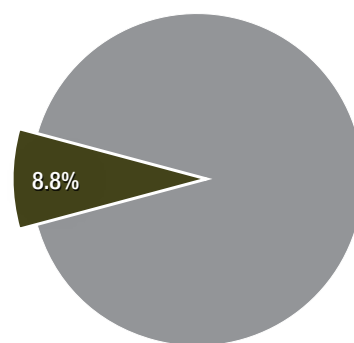
Demographics



Considering Participation in Fishing

Ages 6+

8.8% of Americans are considering participation in fishing.



Why Are You Interested in Outdoor Activities?

Americans Ages 6+ Considering Participation in Fishing

Based on 2010 data

	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

More Americans participate in freshwater fishing than any other type of fishing, and freshwater fishing participants make more fishing outings, on average, than participants in other types of fishing. In 2012, 13.6 percent of Americans ages six and older, 39.1 million people, participated in freshwater fishing, getting out an average of 17.1 days each.

One in five youth ages six to 12 participate in freshwater fishing and youth and young adults ages six to 24 make up nearly a third of fishing participants. Freshwater fishing is the least diverse of all fishing types, however, with 79.9 percent Caucasian/white participants.

Because most Americans have relatively easy access to freshwater fishing, participation is fairly spread out across the nation. The East North Central and South Atlantic regions, have the highest percentage of participants at 17.5 percent and 17.1 percent respectively.

Total Participation

2006	43.1 million participants 16.3 percent of Americans ages 6+
2007	43.9 million participants 15.8 percent of Americans ages 6+
2008	40.3 million participants 14.4 percent of Americans ages 6+
2009	41.0 million participants 14.5 percent of Americans ages 6+
2010	38.9 million participants 13.7 percent of Americans ages 6+
2011	38.9 million participants 13.6 percent of Americans ages 6+
2012	39.1 million participants 13.6 percent of Americans ages 6+



Popular

Freshwater fishing is the most popular form of fishing with more than 39 million participants making 667 million annual outings.



Youth

32.3 percent of freshwater fishing participants are under 25 years old, giving it the highest percentage of youth of any form of fishing.



667 Million

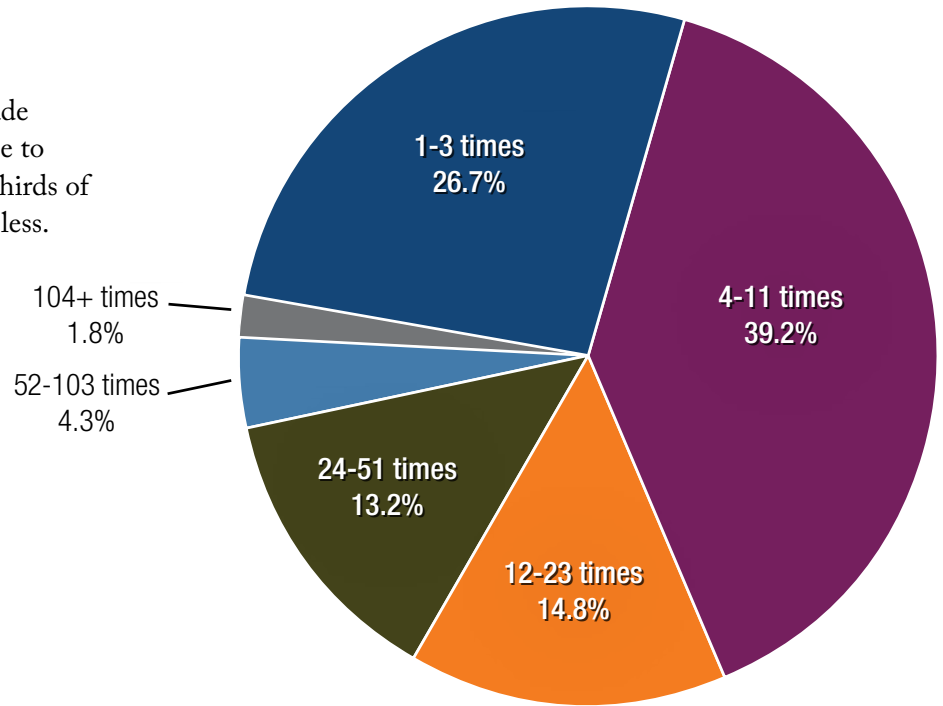
Freshwater fishing participants made 667.3 million outings in 2012.

Annual Outings

In 2012, freshwater fishing participants made 667.3 million annual outings — either close to home or on an overnight trip. About two-thirds of participants averaged 11 annual outings or less.

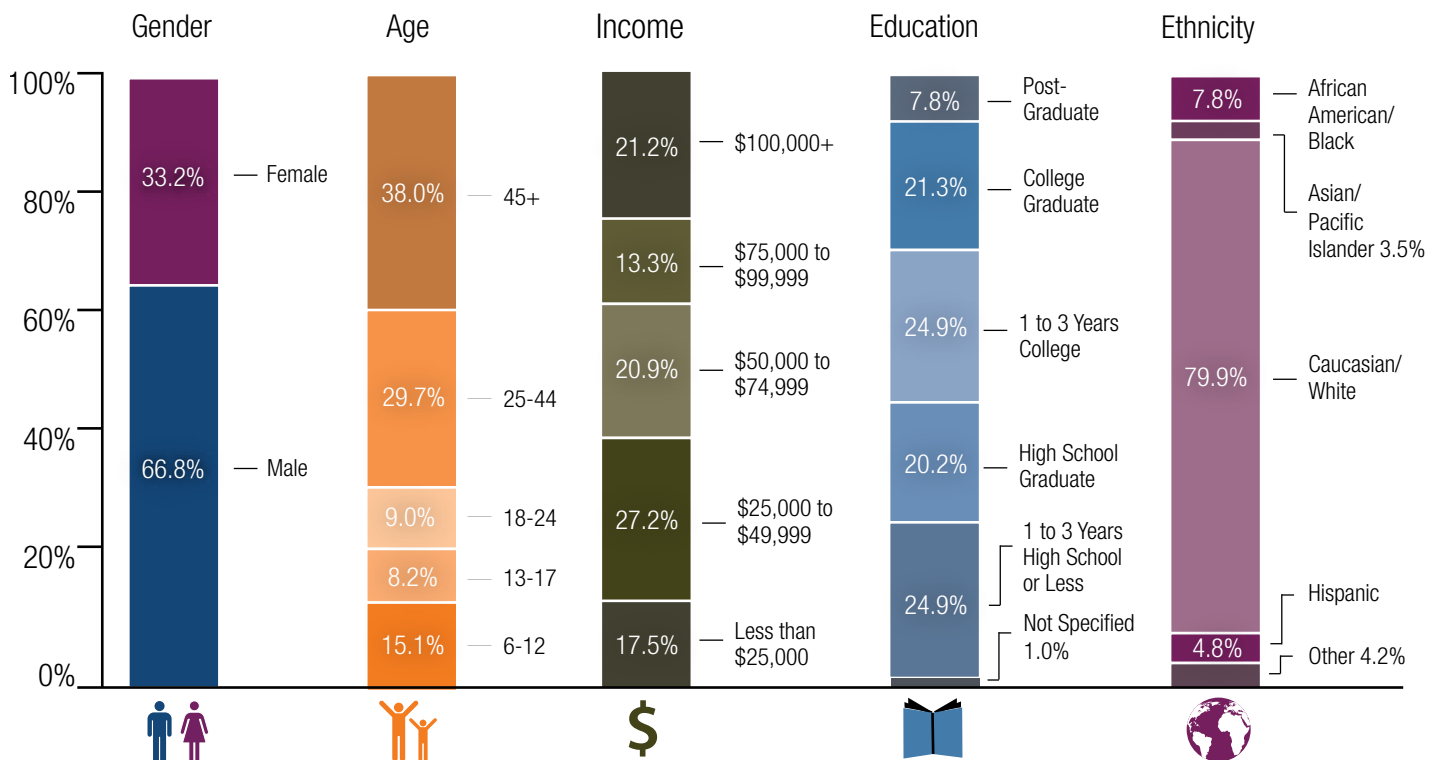
17.1 days

The average number of annual outings per freshwater fishing participant.



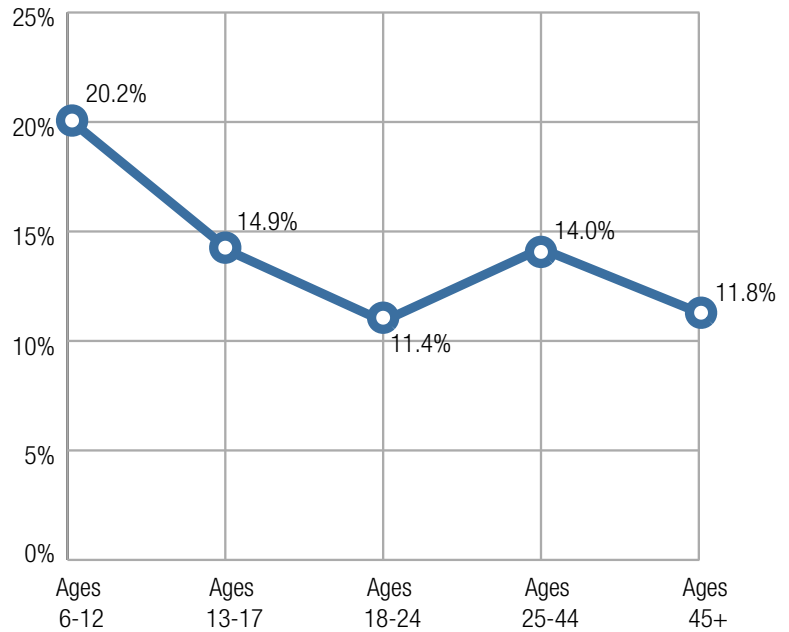
Annual Outings
Among Freshwater Fishing Participants,
Ages 6+

Demographics



Participation Life Cycle

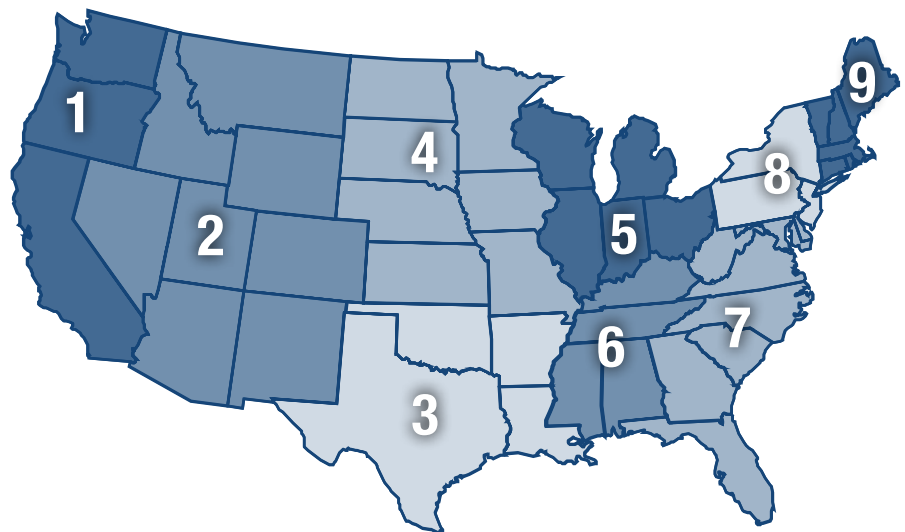
The participation rate among different age groups varies as individuals age and their lives are shaped by their environment and life experiences. A one-year snapshot of freshwater fishing participation helps describe this life cycle of participation.



Geography of Participants

U.S. Census Regions

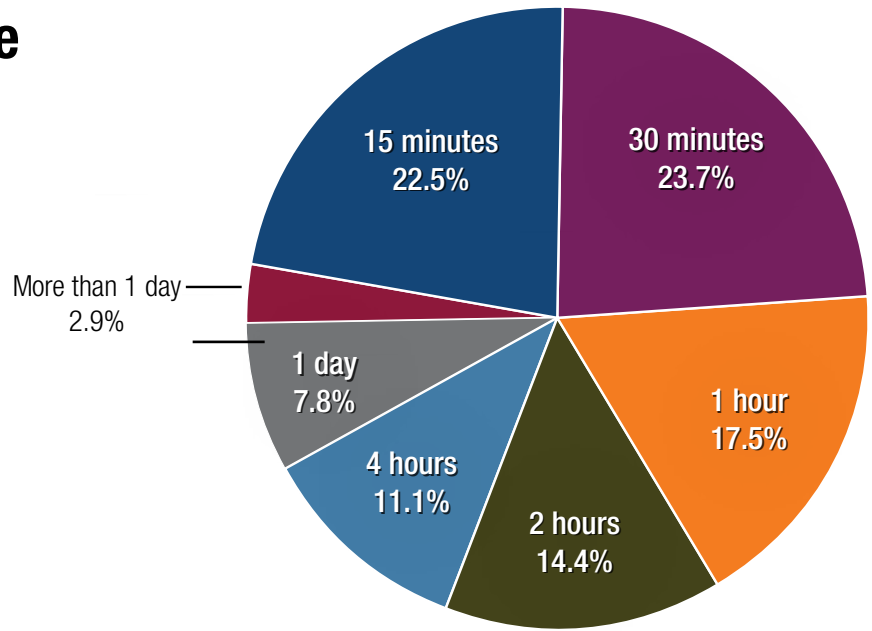
- 1. Pacific: **11.1%**
- 2. Mountain: **8.2%**
- 3. West South Central: **11.9%**
- 4. West North Central: **11.5%**
- 5. East North Central: **17.5%**
- 6. East South Central: **8.5%**
- 7. South Atlantic: **17.1%**
- 8. Middle Atlantic: **10.2%**
- 9. New England: **4.0%**



Time Traveled from Home

Based on 2010 data

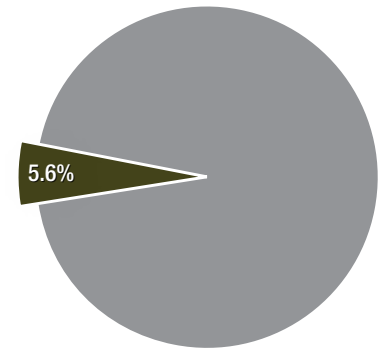
Freshwater fishing participants can travel anywhere from a few minutes to a few days from home to go fishing. Surveying the time freshwater participants traveled on their last in-season freshwater fishing trip reveals how far they usually travel and how often fishing leads them on more distant excursions.



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

First-Time Participants

5.6% of freshwater fishing participants tried the sport for the first time in 2012.



Freshwater Fishing Participants Ages 6+

Competition and Overnight Travel

Based on 2008 data

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

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

SALTWATER FISHING

Less accessible than freshwater fishing, saltwater fishing is the second most popular type of fishing, with 12 million participants, or 4.2 percent of Americans ages six and older. Though participants come from across the nation, most participants are clustered in coastal states.

Unlike many other outdoor activities, saltwater fishing participation remains high or increases among older age groups, peaking at 4.7 percent among ages 25 to 44.

Not surprisingly, saltwater fishing participants spend the most amount of time traveling to fishing venues with more than a third of participants traveling four hours or more.



South Atlantic

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



Ages 45+

44.4 percent of saltwater fishing participants are ages 45 and older.



4 Hours or More

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

Total Participation

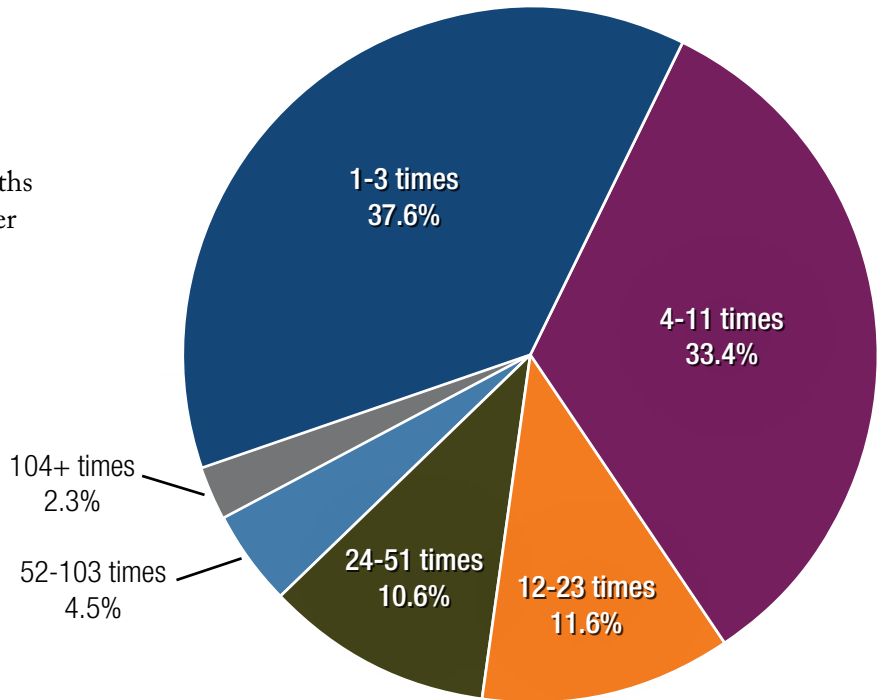
2006	12.5 million participants 4.6 percent of Americans ages 6+
2007	14.4 million participants 5.2 percent of Americans ages 6+
2008	13.8 million participants 4.9 percent of Americans ages 6+
2009	12.3 million participants 4.4 percent of Americans ages 6+
2010	11.8 million participants 4.2 percent of Americans ages 6+
2011	12.0 million participants 4.2 percent of Americans ages 6+
2012	12.0 million participants 4.2 percent of Americans ages 6+

Annual Outings

In 2012, saltwater fishing participants made 200.3 million annual outings — either close to home or on an overnight trip. Nearly three-fourths of participants made an average of one outing per month or less.

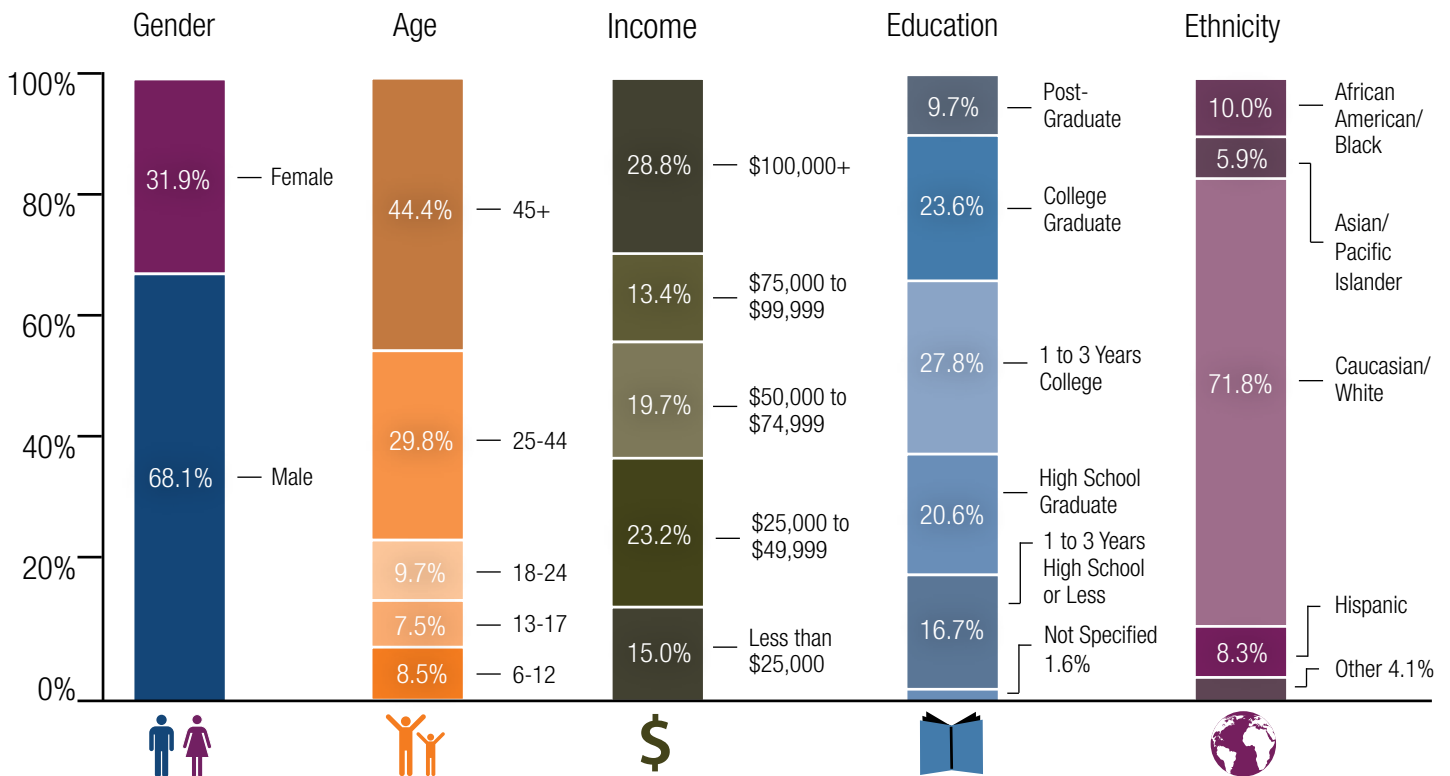
16.7 days

The average number of annual outings per saltwater fishing participant, up 31 percent from 12.8 days in 2011.



Annual Outings
Among Saltwater Fishing Participants,
Ages 6+

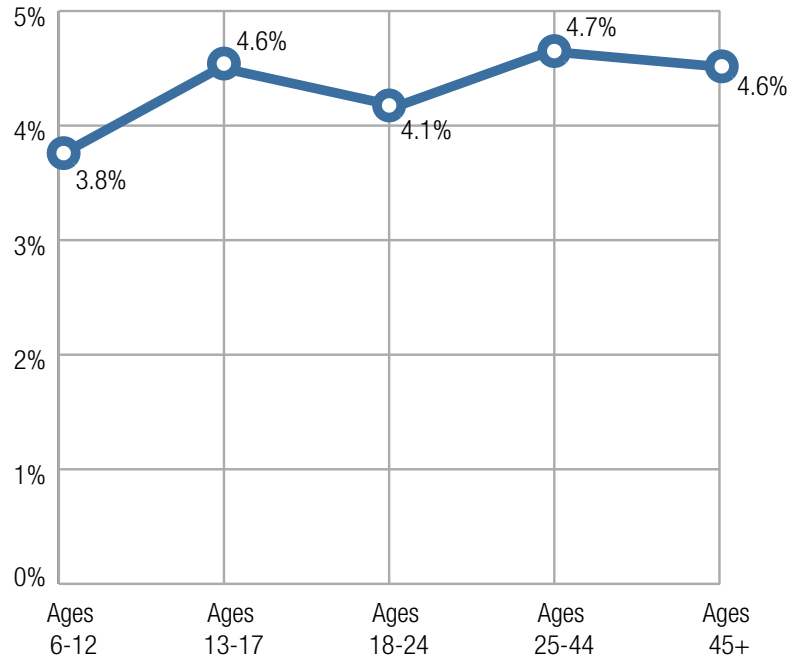
Demographics



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.

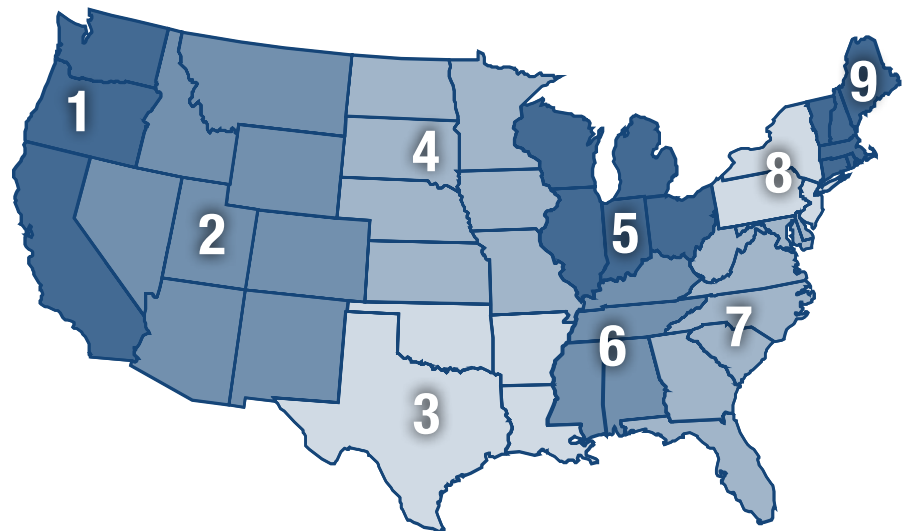
Unlike many other outdoor activities, saltwater fishing participation remains high or increases among older age groups.



Geography of Participants

U.S. Census Regions

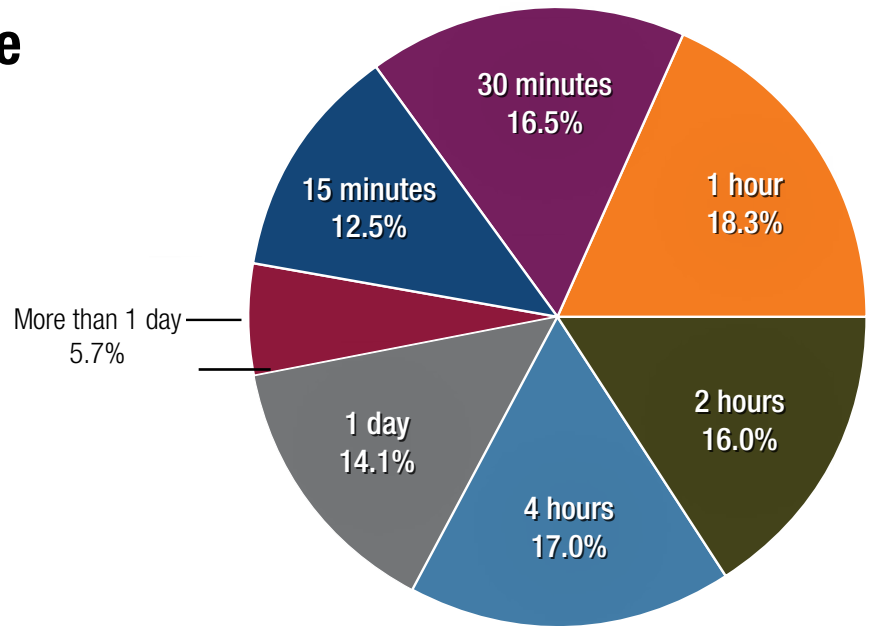
1. Pacific: **16.6%**
2. Mountain: **3.1%**
3. West South Central: **14.5%**
4. West North Central: **2.4%**
5. East North Central: **5.4%**
6. East South Central: **6.4%**
7. South Atlantic: **31.7%**
8. Middle Atlantic: **12.8%**
9. New England: **7.0%**



Time Traveled from Home

Based on 2010 data

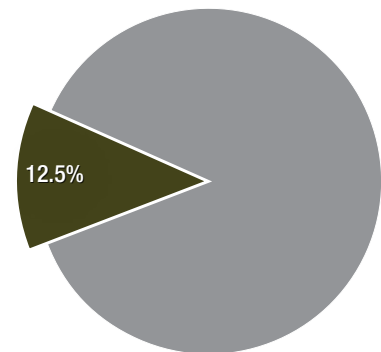
Saltwater fishing participants can travel anywhere from a few minutes to a few days from home to go fishing. Surveying the time saltwater participants traveled on their last in-season saltwater fishing trip reveals how far they usually travel and how often fishing leads them on more distant excursions.



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

First-Time Participants

12.5% of saltwater fishing participants tried the sport for the first time in 2012, up 4.1 percentage points from 8.4 percent in 2011.



Saltwater Fishing Participants, Ages 6+

Competition and Overnight Travel

Based on 2008 data

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

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

FLY FISHING

Fly fishing popularity lags behind saltwater and freshwater fishing, but its six million participants are also the most diverse of all fishing types. More than 28 percent of fly fishing participants are from diverse backgrounds.

Fly fishing also had the highest number of first-time participants in 2012 — 20.5 percent — representing an influx of new participants but also a higher turnover of existing participants.

Fly fishing's popularity increases as participants age, peaking at 3.3 percent among ages 25 to 44.



Ages 25-44

Participation in fly fishing peaks among ages 25-44 at 3.3 percent.



Diversity

Fly fishing is the most diverse form of fishing with 28.5 percent non-Caucasian participants.

Total Participation

2006	6.1 million participants 2.2 percent of Americans ages 6+
2007	5.8 million participants 2.1 percent of Americans ages 6+
2008	5.9 million participants 2.1 percent of Americans ages 6+
2009	5.6 million participants 2.0 percent of Americans ages 6+
2010	5.5 million participants 1.9 percent of Americans ages 6+
2011	5.7 million participants 2.0 percent of Americans ages 6+
2012	6.0 million participants 2.1 percent of Americans ages 6+



New Participants

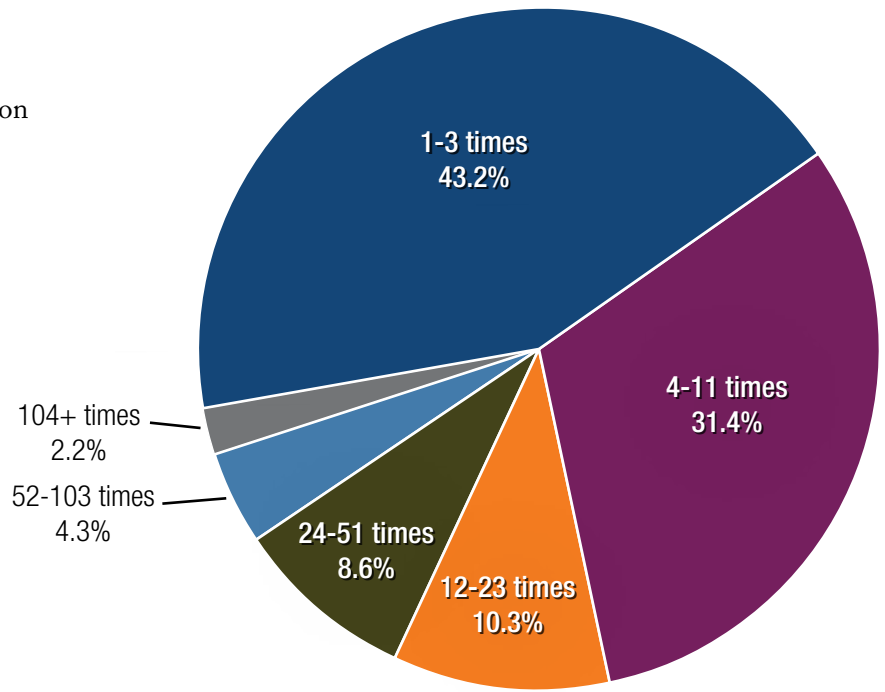
Fly fishing has the highest rate of first-time participants with 20.5 percent first-time fly fishing participants in 2012.

Annual Outings

In 2012, fly fishing participants made 94.0 million annual outings — either close to home or on an overnight trip. More than one-quarter of fly fishing participants went an average of once per month or more.

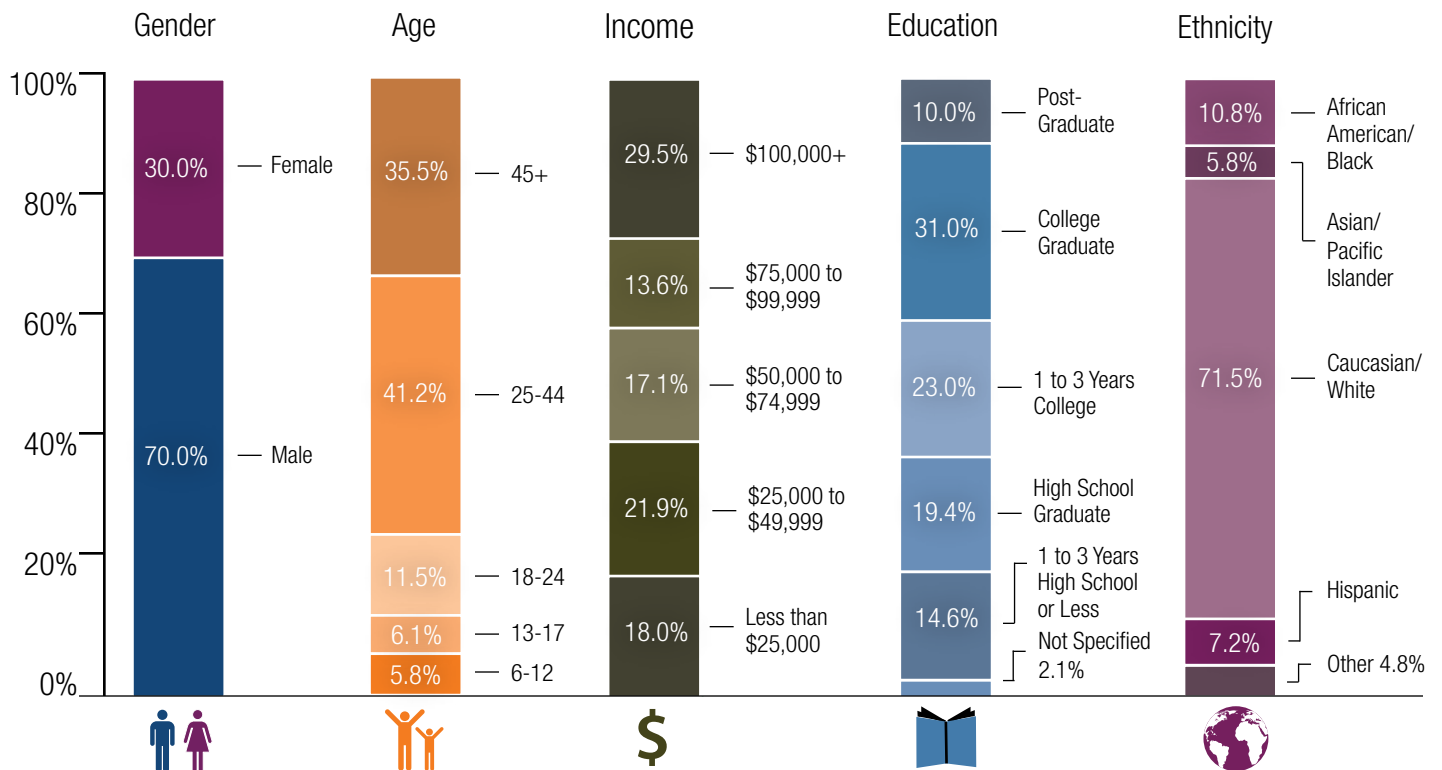
15.6 days

The average number of annual outings per fly fishing participant.



Annual Outings
Among Fly Fishing Participants,
Ages 6+

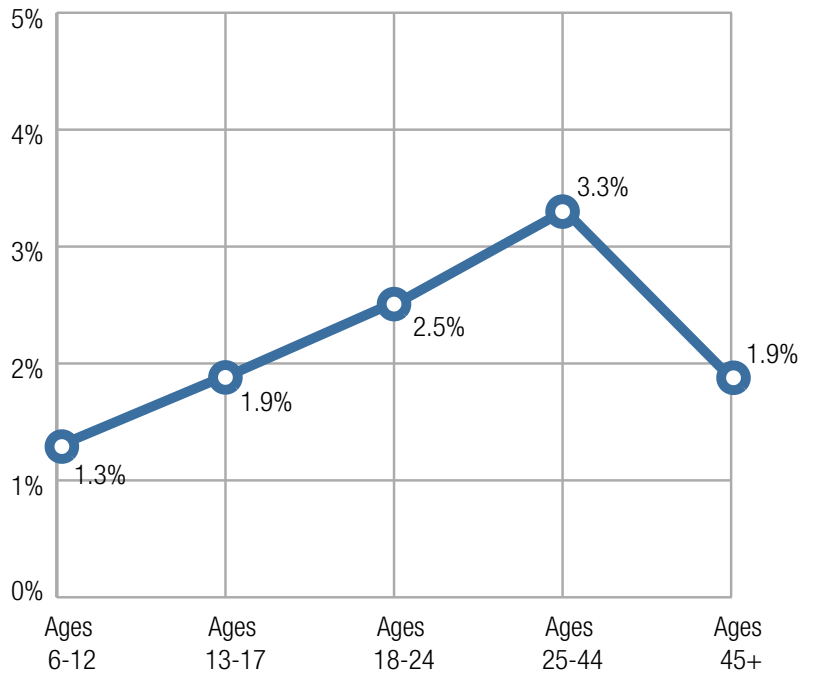
Demographics



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.

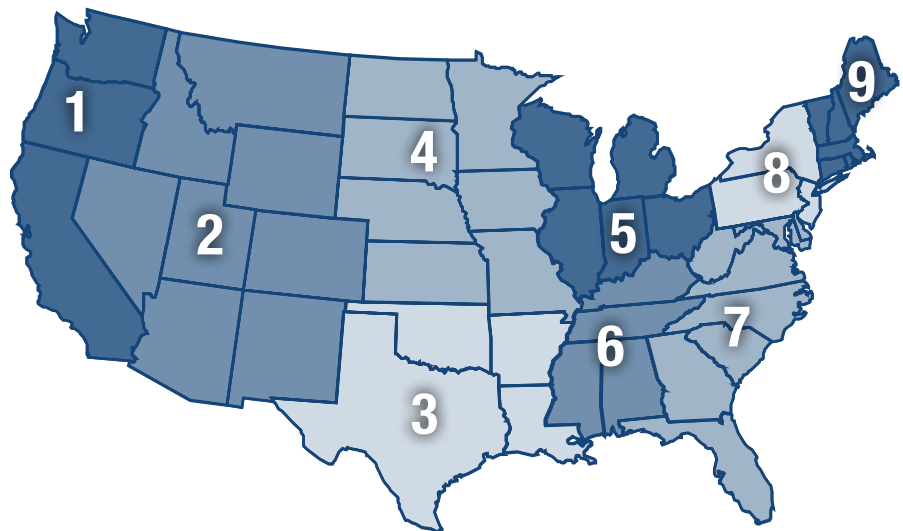
Fly fishing participation increases in each age group until declining among participants ages 45 and older.



Geography of Participants

U.S. Census Regions

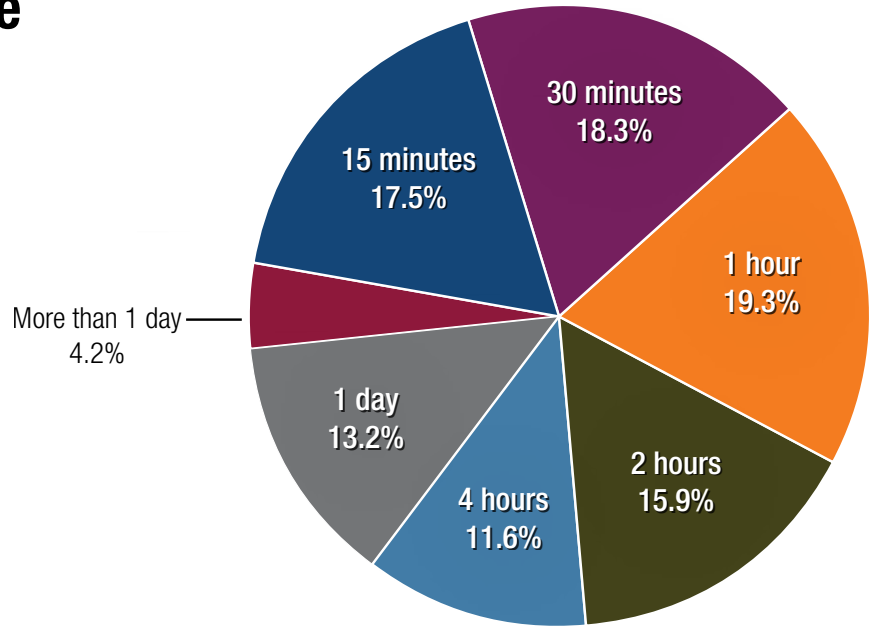
- 1. Pacific: **18.9%**
- 2. Mountain: **11.4%**
- 3. West South Central: **10.1%**
- 4. West North Central: **7.2%**
- 5. East North Central: **12.9%**
- 6. East South Central: **5.1%**
- 7. South Atlantic: **15.8%**
- 8. Middle Atlantic: **16.6%**
- 9. New England: **2.0%**



Time Traveled from Home

Based on 2010 data

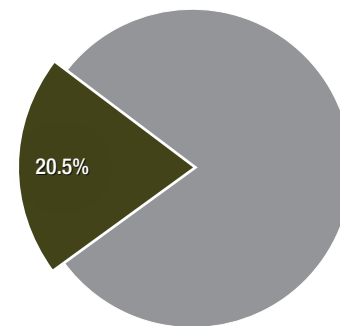
Fly fishing participants can travel anywhere from a few minutes to a few days from home to go fishing. Surveying the time fly fishing participants traveled on their last in-season fly fishing trip reveals how far they usually travel and how often fishing leads them on more distant excursions.



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

First-Time Participants

20.5% of fly fishing participants tried the sport for the first time in 2012, up 6.1 percentage points from 14.4 percent in 2011.



Fly Fishing Participants, Ages 6+

Competition and Overnight Travel

Based on 2008 data

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

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

YOUTH

The future of fishing is in today's young participants. Typically, as with most outdoor activities, fishing participation rates are highest in the youngest age group, ages six to 12, and then decline as participants age, recovering slightly in young adulthood and middle age. Youth participation declines are sharper among females than among males.

In 2012, 27.4 percent of males ages six to 12 participated in fishing and 16.6 percent of females of the same age participated. Among ages 13 to 17, these numbers drop to 24.7 percent of males and 10.2 percent of females.

Total Participation

2007	Ages 6-12	7.9 million participants 27.8 percent of age group
	Ages 13-17	4.5 million participants 20.5 percent of age group
2008	Ages 6-12	6.7 million participants 24.8 percent of age group
	Ages 13-17	4.5 million participants 20.2 percent of age group
2009	Ages 6-12	6.9 million participants 25.4 percent of age group
	Ages 13-17	4.3 million participants 19.0 percent of age group
2010	Ages 6-12	6.0 million participants 21.9 percent of age group
	Ages 13-17	4.2 million participants 18.6 percent of age group
2011	Ages 6-12	6.3 million participants 22.6 percent of age group
	Ages 13-17	4.0 million participants 17.7 percent of age group
2012	Ages 6-12	6.4 million participants 22.0 percent of age group
	Ages 13-17	3.8 million participants 17.7 percent of age group



Females

Participation declines among females ages 13 to 17 more sharply than among males of the same age.



Parents

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

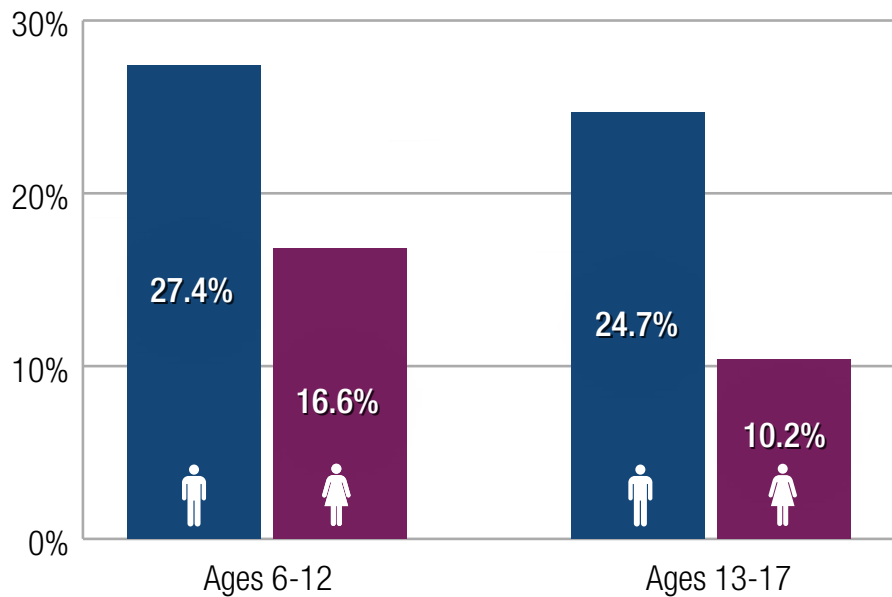


Boating

More than 45 percent of youth fishing participants ages six to 17 also participate in boating.

Youth Participation in Fishing by Gender

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



Who Introduces Youth Fishing Participants to Outdoor Activities?

Based on 2010 data

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

Crossover Participation

Youth Ages 6 to 17

Outdoor Activities

1. Road, Mountain or BMX Bicycling **47.8%**
2. Car, Backyard or RV Camping **42.9%**
3. Running, Jogging or Trail Running **31.6%**
4. Hiking **23.5%**
5. Paddling **21.3%**

Indoor Fitness Activities

1. Free Weights **18.4%**
2. Stretching **11.0%**
3. Treadmill **10.7%**
4. Weight/Resistance Machines **10.3%**
5. Exercise to Music **8.4%**

Team Sports

1. Basketball **28.0%**
2. Football **23.3%**
3. Baseball **22.6%**
4. Soccer **20.6%**
5. Volleyball **10.0%**

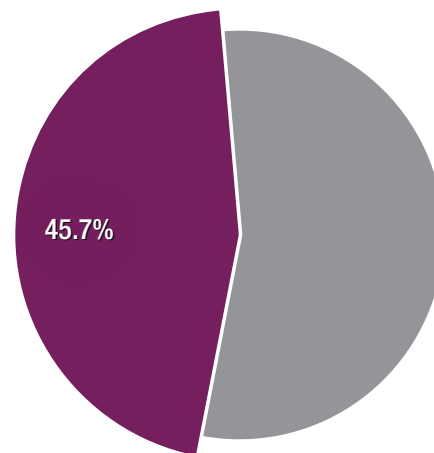
Other Activities

1. Bowling **35.5%**
2. Fitness Walking **28.7%**
3. Swimming for Fitness **18.6%**
4. Golf **15.5%**
5. Shooting and Target Shooting **15.3%**

Crossover Participation in Boating

Youth Ages 6 to 17

45.7% of youth fishing participants also participated in boating in 2012.



Youth Fishing Participants,
Ages 6-17



POTENTIAL NEW YOUTH FISHING PARTICIPANTS

Growing youth participation in fishing builds a strong foundation for the sport today and in years to come. The following pages help describe the demographics and motivations of those young people who do not participate in fishing but are interested in the sport.

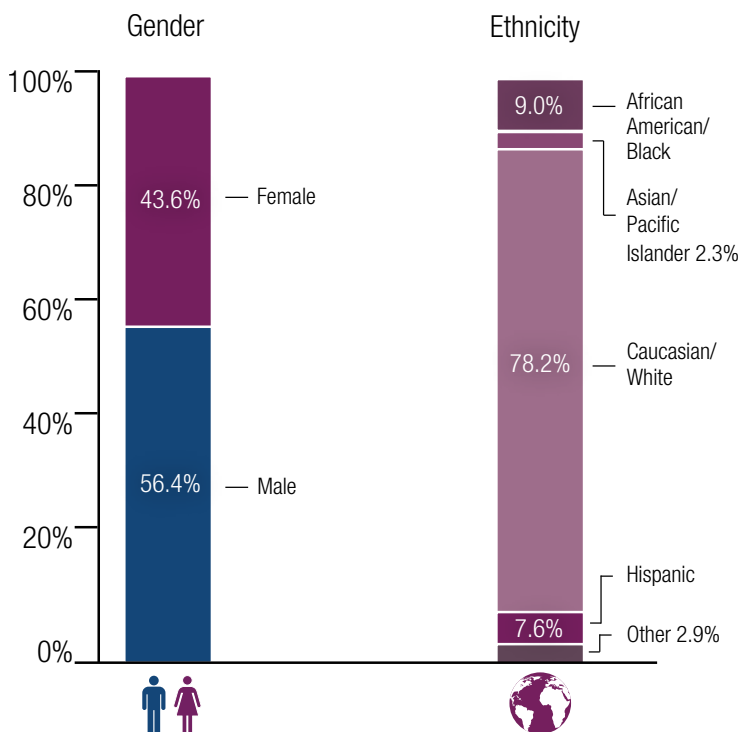
One in 10 youth who do not participate in fishing are considering picking up a rod and reel. Of these, 43.6 percent are female. Young participants are most drawn to the outdoors by friends, family and their perception that outdoor activities are “cool.”



43.6% Female

43.6 percent of potential new youth fishing participants are female.

Demographics



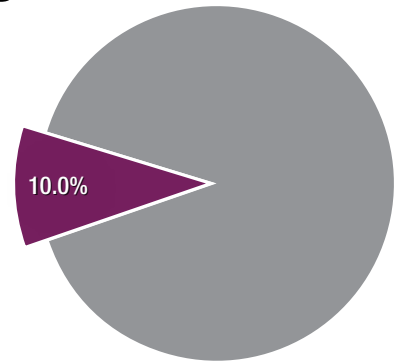
Cool

Almost 50 percent of adolescents considering participation in outdoor activities are interested because they think outdoor activities are cool.

Youth Considering Participation in Fishing

Americans Ages 6 to 17

10.0% of youth are considering participation in fishing.



Why Are You Interested in Outdoor Activities?

Americans Ages 6 to 17 Considering Participation in Fishing

Based on 2010 data

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

HISPANICS

Hispanics are the largest minority group in the United States, and their population is growing rapidly, but they make up only 5.6 percent of America's fishing participants. Nearly a quarter of Hispanic fishing participants live in the West South Central region of the U.S., which includes Texas, Louisiana, Arkansas and Oklahoma.

Freshwater fishing is the most popular type of fishing among Hispanics and 38 percent of Hispanic fishing participants participated in boating.

Total Participation

Hispanics, Ages 6+

2008 Fishing (All): 13.7 percent, 2.4 million participants
Freshwater Fishing: 10.4 percent
Saltwater Fishing: 6.2 percent
Fly Fishing: 1.5 percent

2009 Fishing (All): 13.6 percent, 2.6 million participants
Freshwater Fishing: 10.6 percent
Saltwater Fishing: 4.8 percent
Fly Fishing: 1.7 percent

2010 Fishing (All): 14.5 percent, 3.4 million participants
Freshwater Fishing: 11.0 percent
Saltwater Fishing: 5.7 percent
Fly Fishing: 1.7 percent

2011 Fishing (All): 11.9 percent, 3.1 million participants
Freshwater Fishing: 9.0 percent
Saltwater Fishing: 4.6 percent
Fly Fishing: 1.4 percent

2012 Fishing (All): 13.8 percent, 2.8 million participants
Freshwater Fishing: 9.4 percent
Saltwater Fishing: 5.6 percent
Fly Fishing: 3.0 percent



Ages 25 to 44

Adults, ages 25 to 44, make up more than 45 percent of Hispanic fishing participants.



West South Central

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



Camping

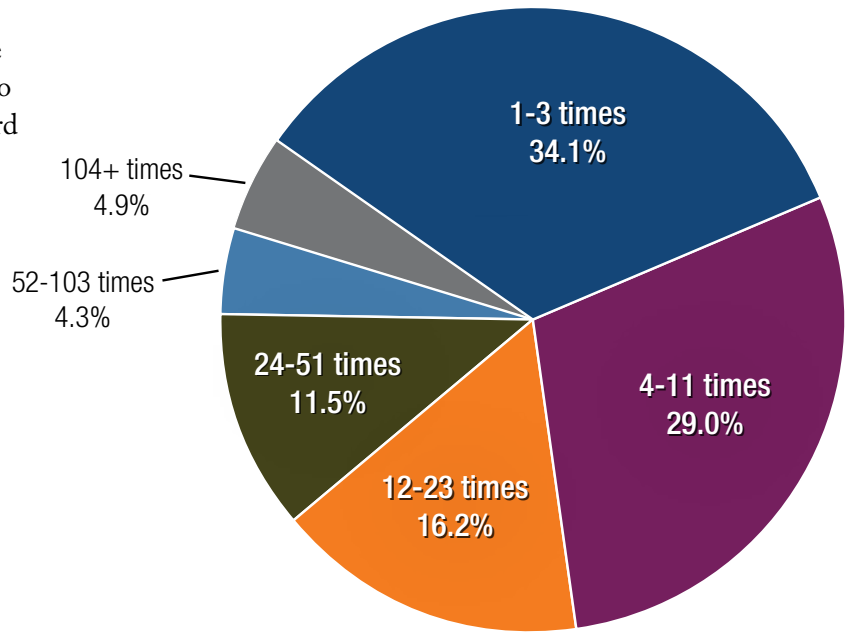
Camping is the most popular outdoor activity among Hispanic fishing participants.

Annual Outings

In 2012, Hispanic fishing participants made more than 59.3 million annual outings — either close to home or on an overnight trip. More than one-third of participants made one outing per month or more.

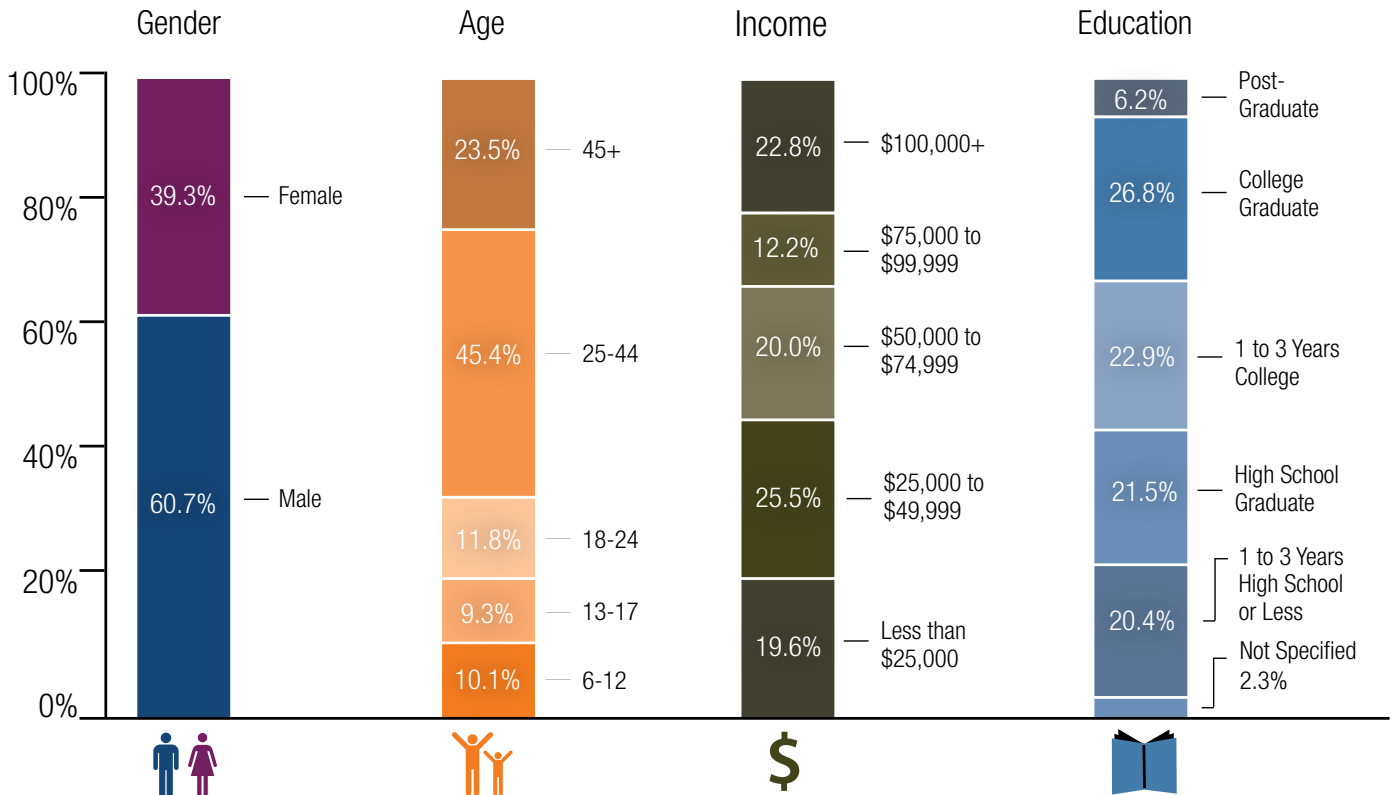
21.6 days

The average number of annual outings per Hispanic fishing participant.



Annual Outings
Among Hispanic Fishing Participants,
Ages 6+

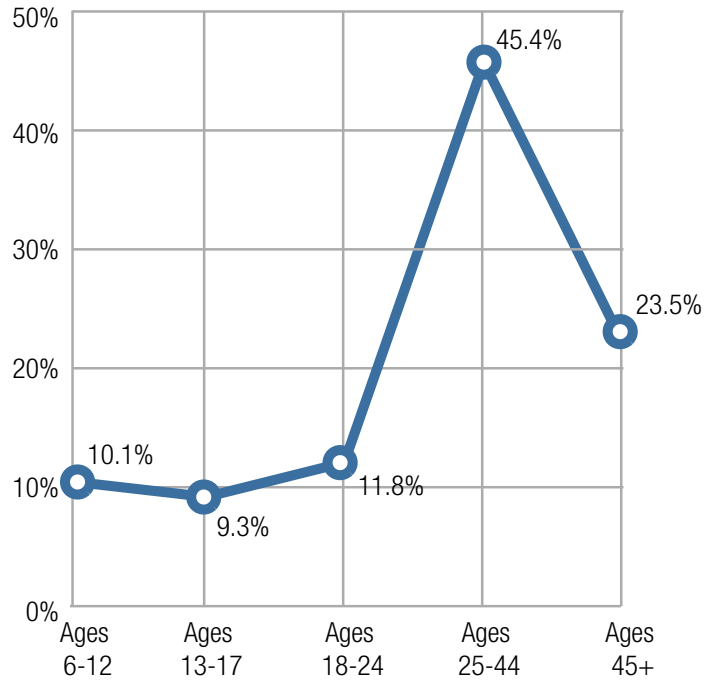
Demographics



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.

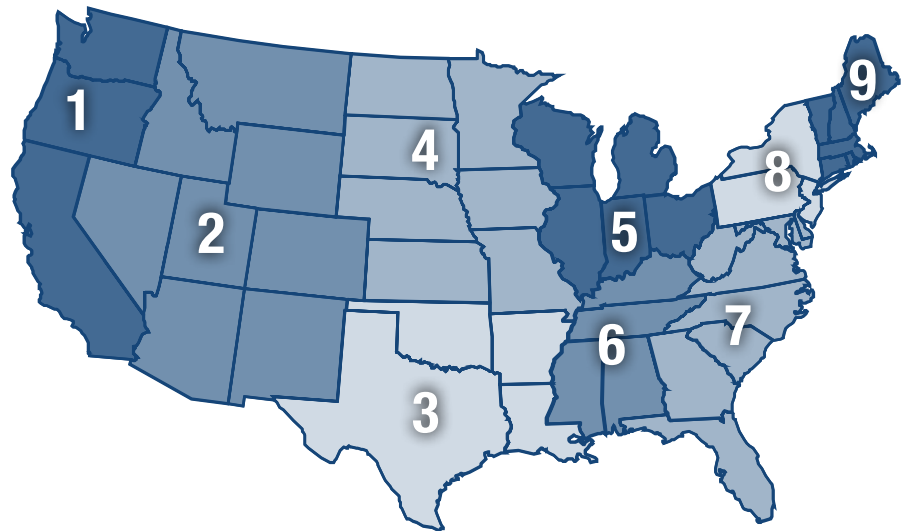
The Hispanic life cycle of fishing participation declines slightly during adolescence before increasing in young adulthood and then peaking among participants ages 25 to 44.



Geography of Participants

U.S. Census Regions

- 1. Pacific: **18.0%**
- 2. Mountain: **11.7%**
- 3. West South Central: **23.8%**
- 4. West North Central: **1.7%**
- 5. East North Central: **8.1%**
- 6. East South Central: **1.8%**
- 7. South Atlantic: **17.0%**
- 8. Middle Atlantic: **14.5%**
- 9. New England: **3.6%**



Crossover Participation

Hispanics Ages 6+

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

Outdoor Activities

1. Car, Backyard or RV Camping **34.8%**
2. Running, Jogging or Trail Running **33.5%**
3. Road, Mountain or BMX Bicycling **30.9%**
4. Paddling **21.5%**
5. Hunting **20.6%**

Team Sports

1. Basketball **19.5%**
2. Football **18.9%**
3. Soccer **17.3%**
4. Baseball **15.9%**
5. Volleyball **15.8%**

Indoor Fitness Activities

1. Free Weights **32.1%**
2. Stationary Cycling **23.6%**
3. Weight/Resistance Machines **22.8%**
4. Treadmill **21.6%**
5. Home Gym Exercise **19.5%**

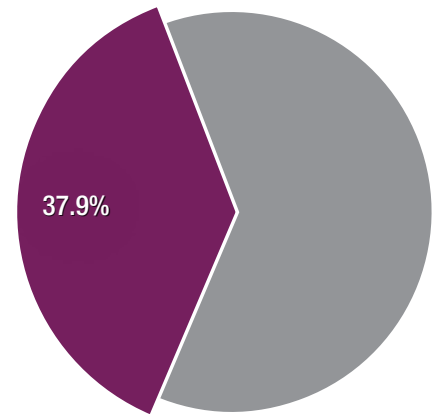
Other Activities

1. Fitness Walking **45.9%**
2. Bowling **29.7%**
3. Billiards **25.6%**
4. Golf **19.5%**
5. Shooting and Target Shooting **15.9%**

Crossover Participation in Boating

Hispanics Ages 6+

37.9% of Hispanic fishing participants also participated in boating in 2012, up 3.2 percentage points from 34.7 percent in 2011.



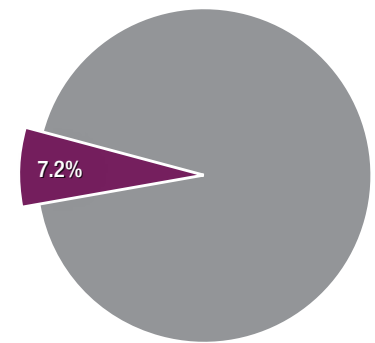
Hispanic Fishing Participants,
Ages 6+

POTENTIAL NEW HISPANIC FISHING PARTICIPANTS

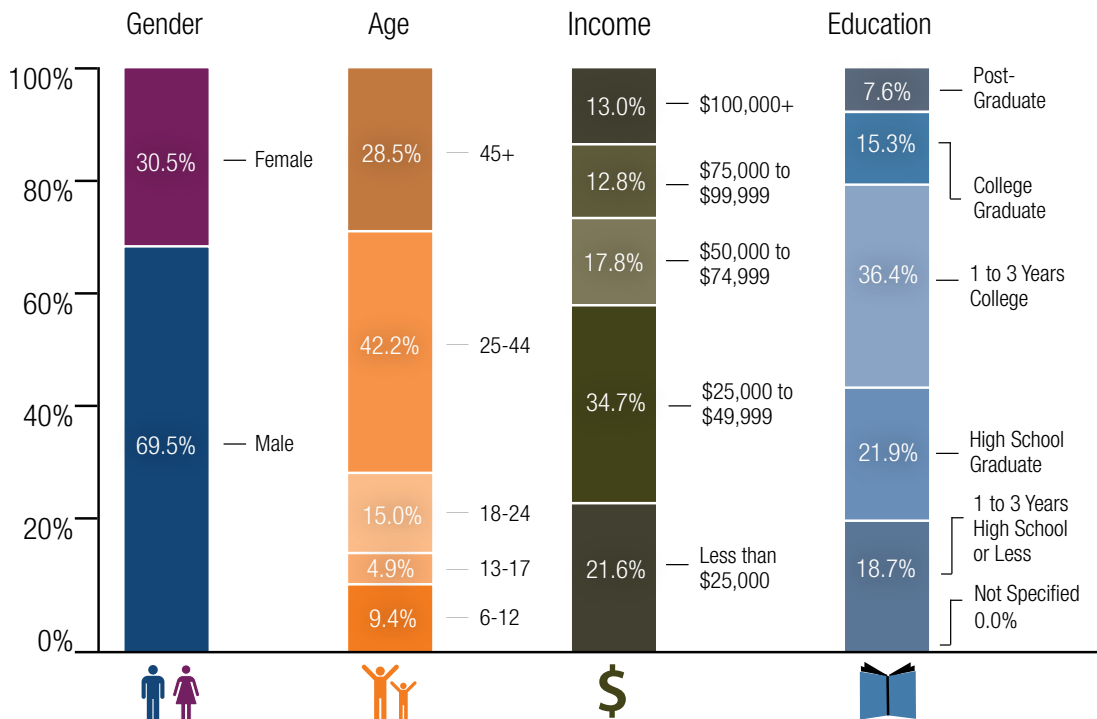
Hispanics, the largest minority population in the United States, are underrepresented in outdoor activities, including fishing. As their population continues to grow, it will be increasingly critical for the future of fishing to understand and engage new Hispanic participants.

7.2% of Hispanic Americans Ages 6+ are considering participation in fishing.

While 8.8 percent of all Americans who don't participate in fishing are interested in trying the sport, a slightly lower percentage of Hispanics, 7.2 percent, are considering fishing. Of these, 69.5 percent are male, 42.2 percent are ages 25 to 44 and 34.7 percent have a household income between \$25,000 and \$50,000. The following pages present a full profile of Hispanics ages six and older who do not participate in fishing but are interested in becoming active in the activity.



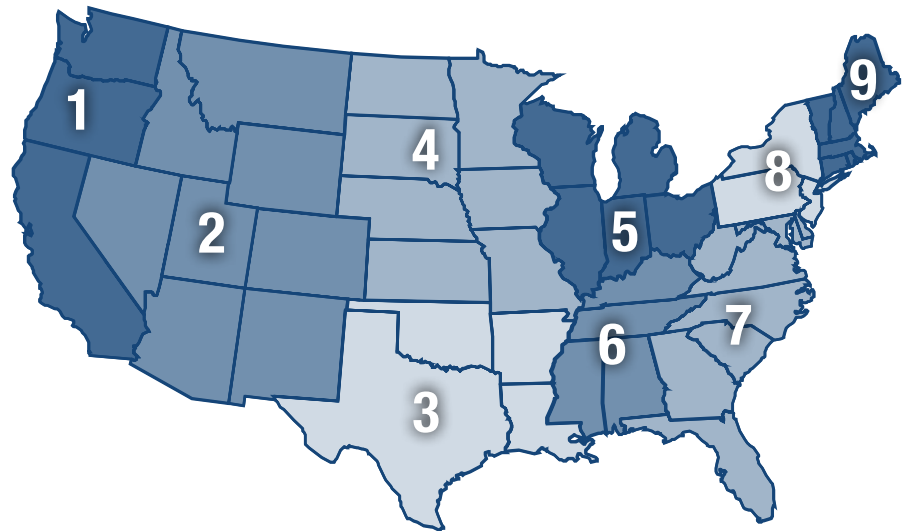
Demographics



Geography of Hispanic Americans Considering Fishing

U.S. Census Regions

- 1. Pacific: **28.2%**
- 2. Mountain: **10.3%**
- 3. West South Central: **25.3%**
- 4. West North Central: **2.5%**
- 5. East North Central: **4.9%**
- 6. East South Central: **0.0%**
- 7. South Atlantic: **14.9%**
- 8. Middle Atlantic: **12.2%**
- 9. New England: **1.6%**



Why Are You Interested in Outdoor Activities?

Hispanics Ages 6+ Considering Participation in Fishing

Based on 2010 data

	Hispanics Ages 6+
Outdoor activities are a good way to get exercise/stay fit	46.2%
Outdoor activities are cool	46.1%
I want to relax/manage stress	38.3%
I want to try something new	38.1%
I want a change from my usual routine	37.5%
I can do outdoor activities near my home	35.0%
I like challenges	31.8%
Outdoor activities are affordable	30.3%
My parents/brothers/sisters/other relatives participate	27.8%
My friends participate	21.8%
Outdoor activities look fun in magazines/books/websites/TV/movies	20.0%
My kids are the right age now	13.4%
A school/community/other organized program introduced me	3.4%
Other reason	2.1%

BOAT OWNERSHIP

More than 21 million Americans ages six and older own a boat and an additional 14.4 million Americans ages six and older are considering purchasing a boat. The rate of boat ownership rises as household income increases, and among boat owners, two-thirds own just one boat.

The most popular boats are kayaks/canoes and bass boats, and most boats are stored on trailers at the owners' primary residences. Americans primarily buy their new boats from dealerships and their used boats from friends.

The following pages profile boat owners, their boats, boat purchases and investments and prospective boat owners.



21.2 Million

21.2 million Americans ages six and older own a boat.



Dealership

More than 65 percent of new boats were purchased at a dealership. More than 38 percent of used boats were purchased from a friend.



Kayaks/Canoes

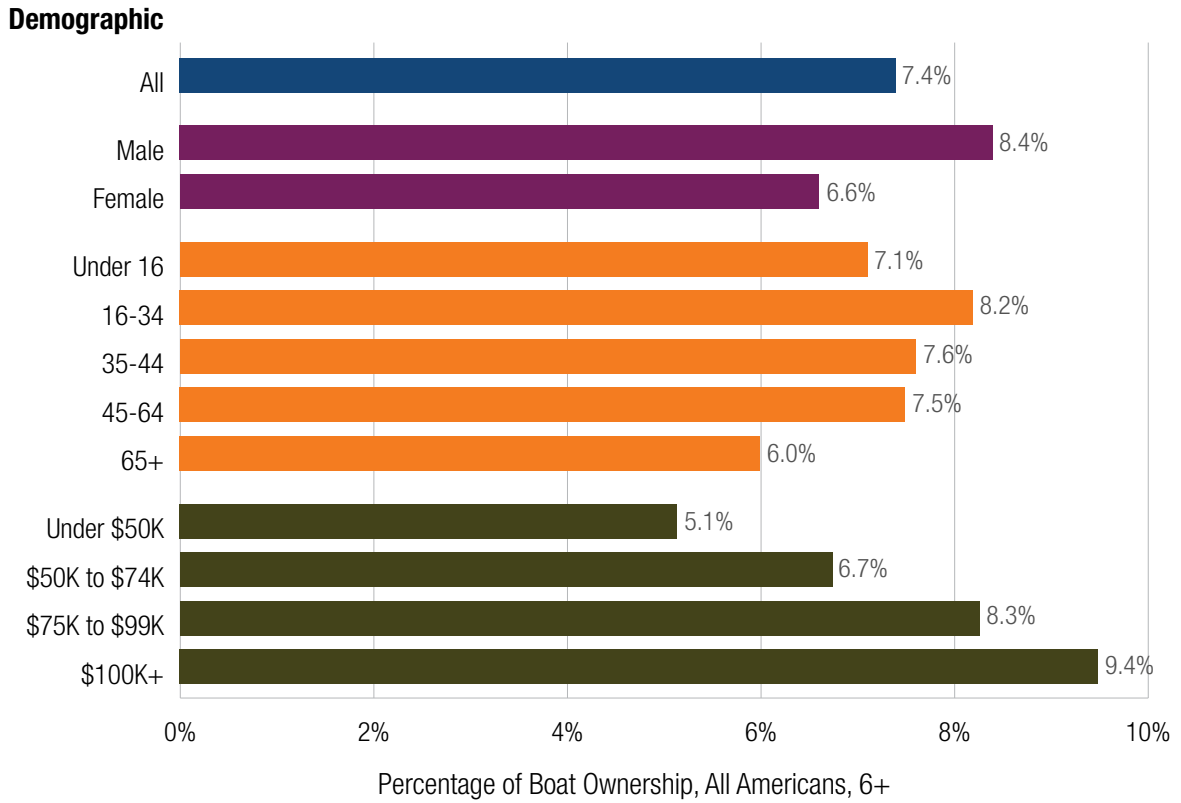
20.7 percent of boat owners owned a kayak or canoe in 2012, up 8.6 percentage points from 2011.

Ownership Rates

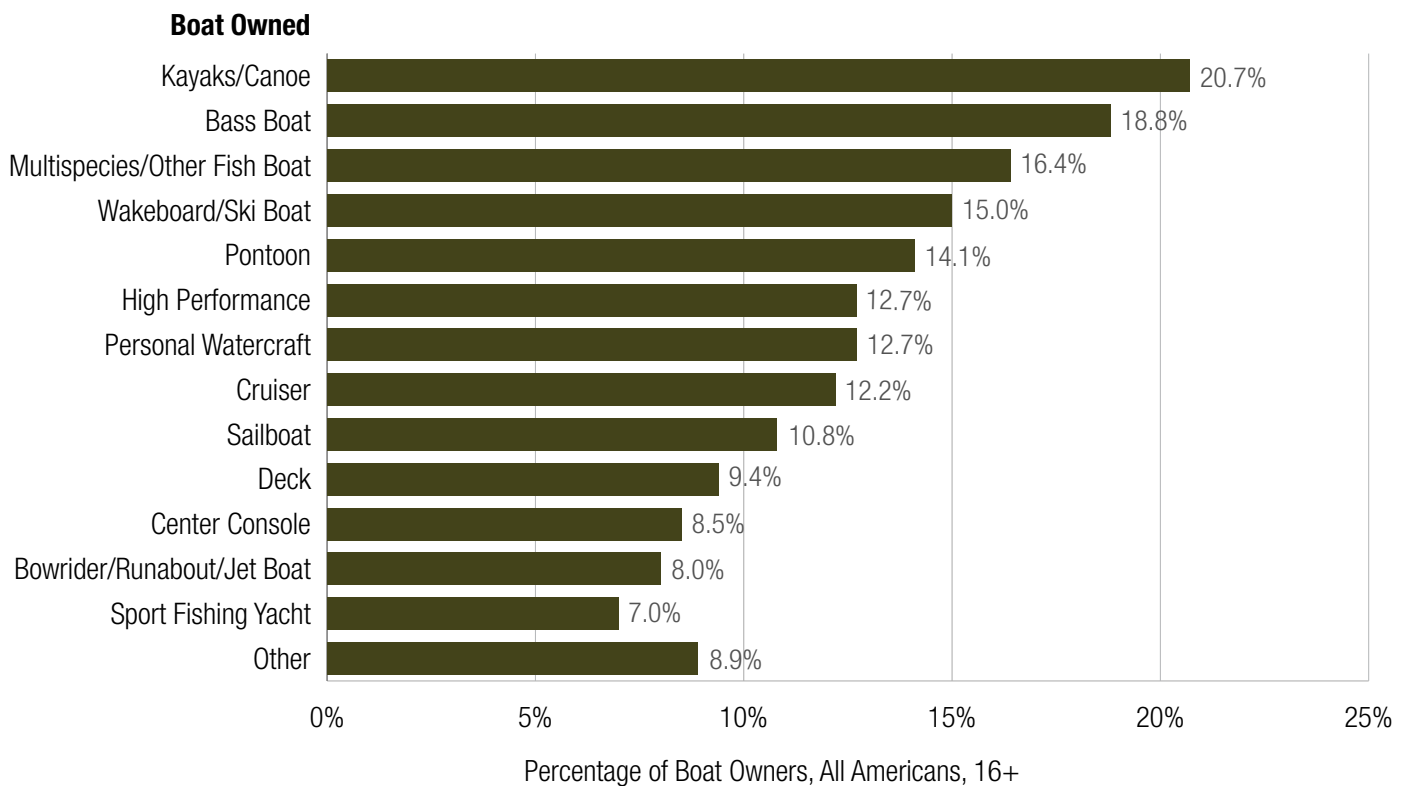
2009	7.3 percent of Americans ages 6+ own a boat 20.5 million Americans own a boat
2010	7.0 percent of Americans ages 6+ own a boat 19.9 million Americans own a boat
2011	7.9 percent of Americans ages 6+ own a boat 22.6 million Americans own a boat
2012	7.4 percent of Americans ages 6+ own a boat 21.2 million Americans own a boat

The overall boating ownership rates above are calculated from the Outdoor Foundation's 2013 Outdoor Participation Report, which uses the total population ages six and older.

Boat Ownership Rate by Demographic



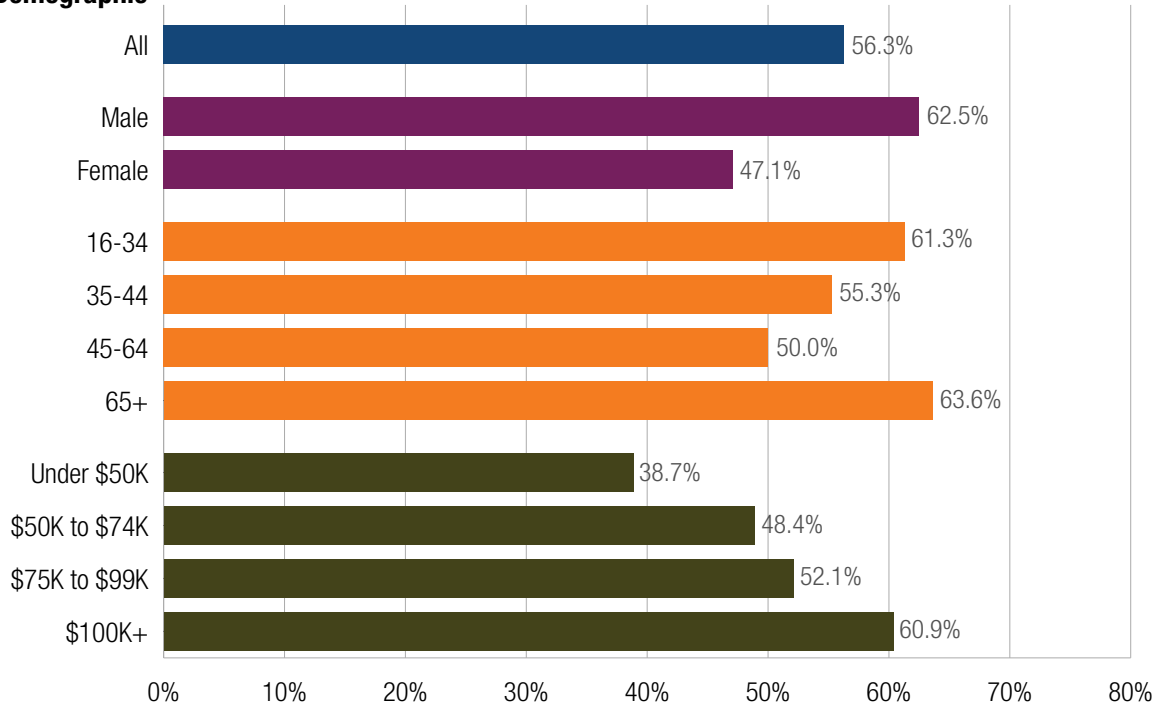
Boat Ownership by Boat Type



New and Previously-Owned Boat Ownership

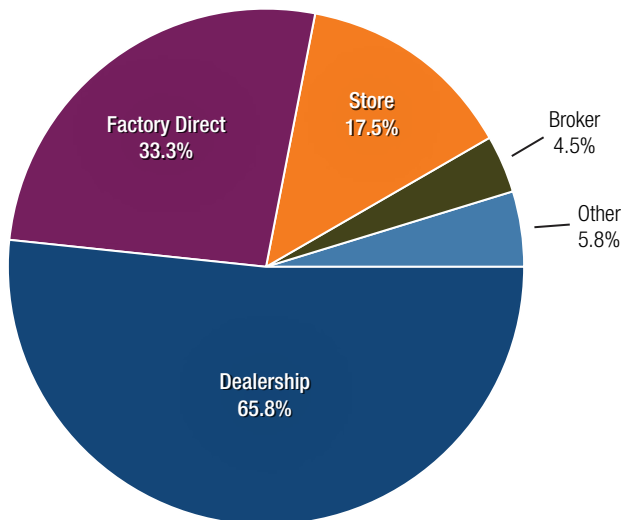
Individuals Who Purchased Their Boat New

Demographic

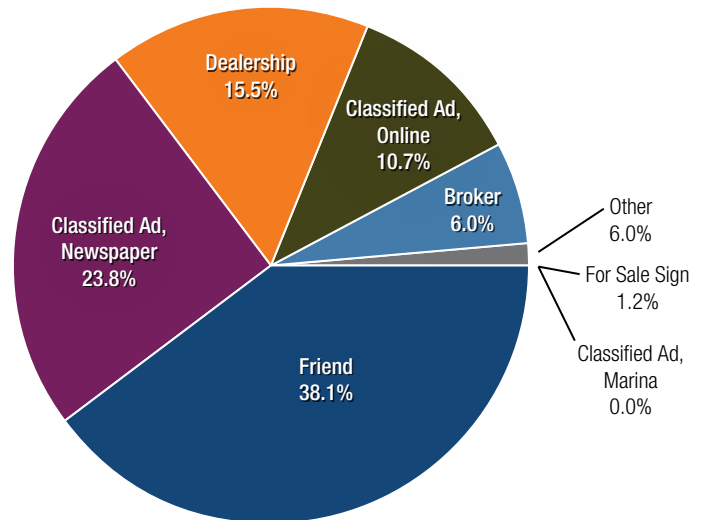


Percent of Boat Owners Whose Primary Boat was Purchased New, Ages 16+

Where Did You Purchase Your New Boat?

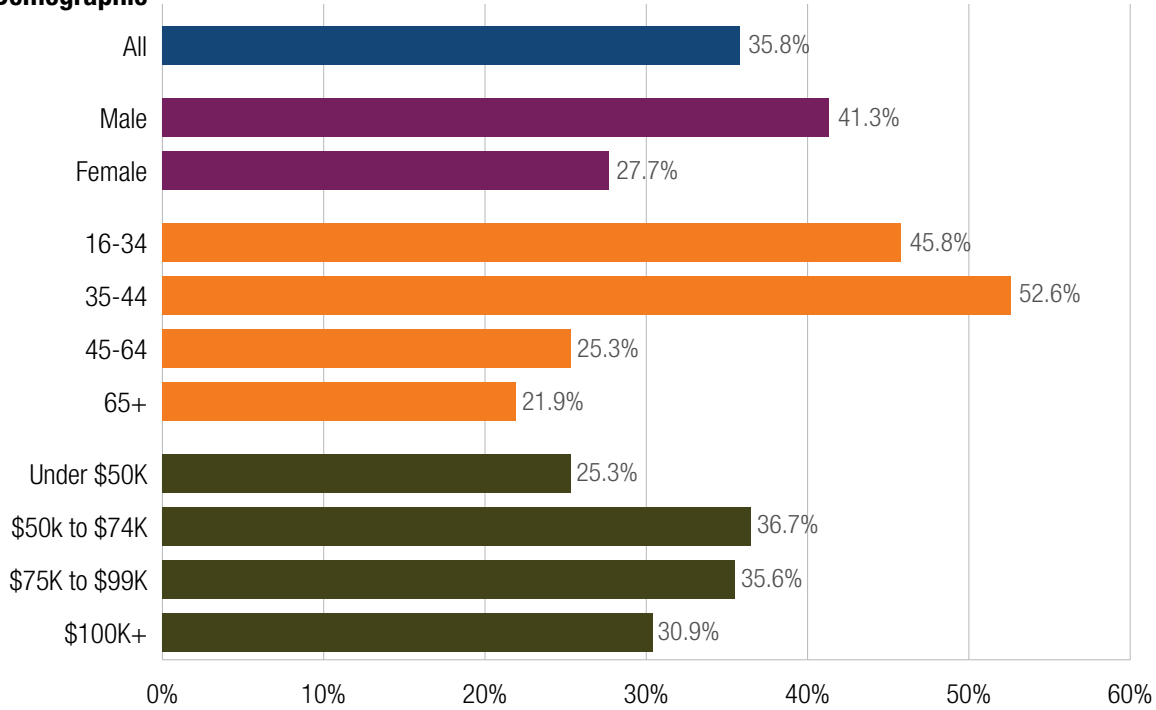


Where Did You Buy Your Pre-Owned Boat?



Individuals Who Financed Their Boat

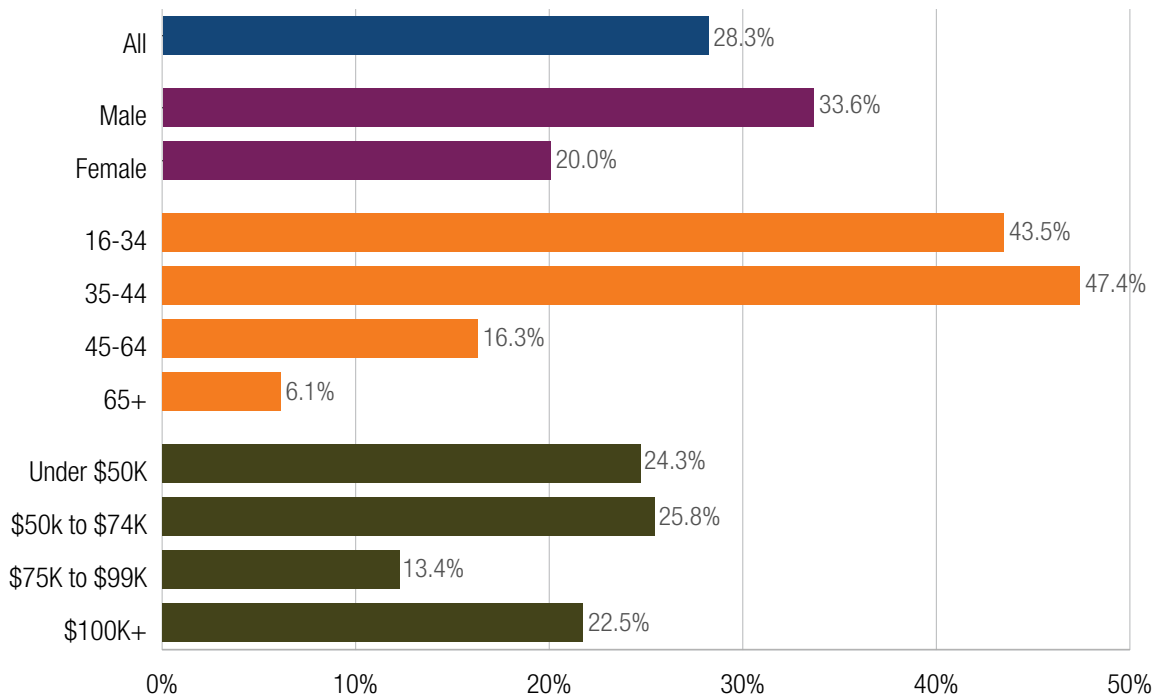
Demographic



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

Individuals Considering Repowering Their Boat Next Year

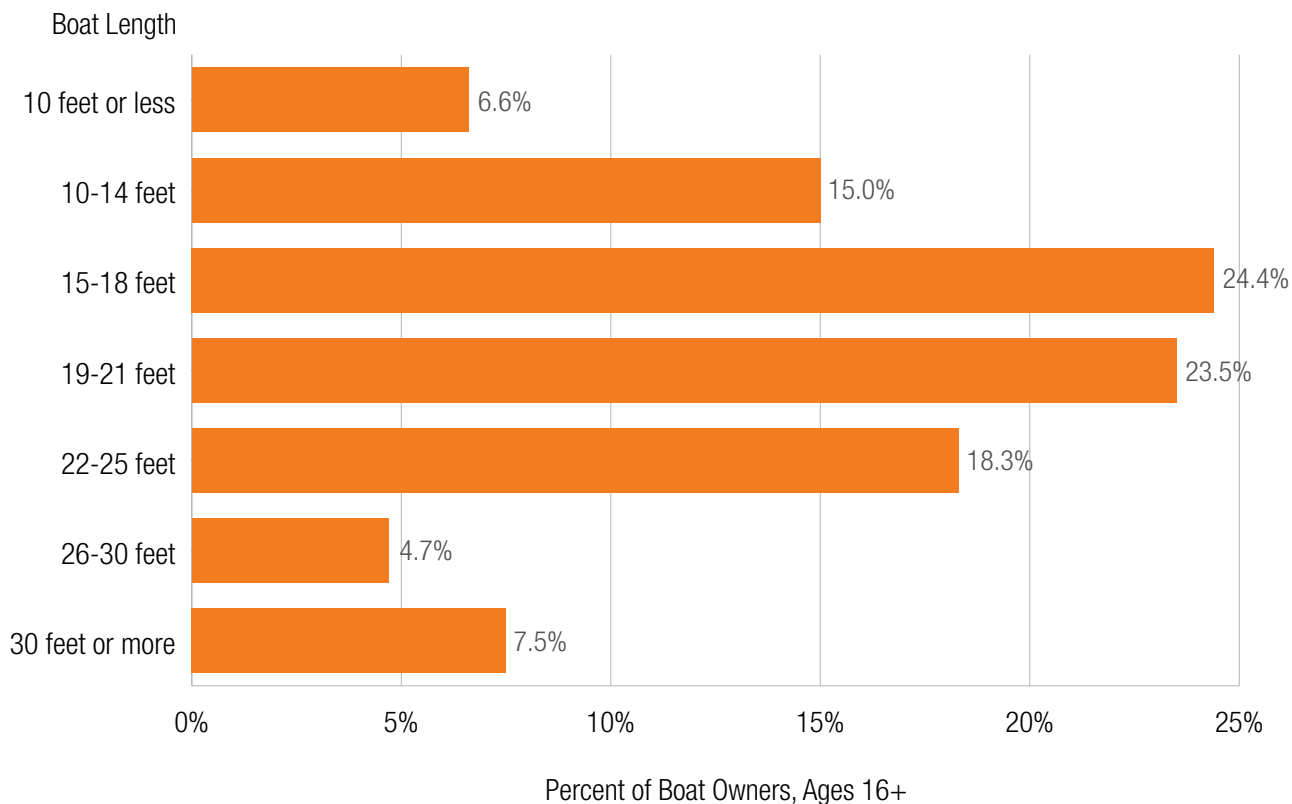
Demographic



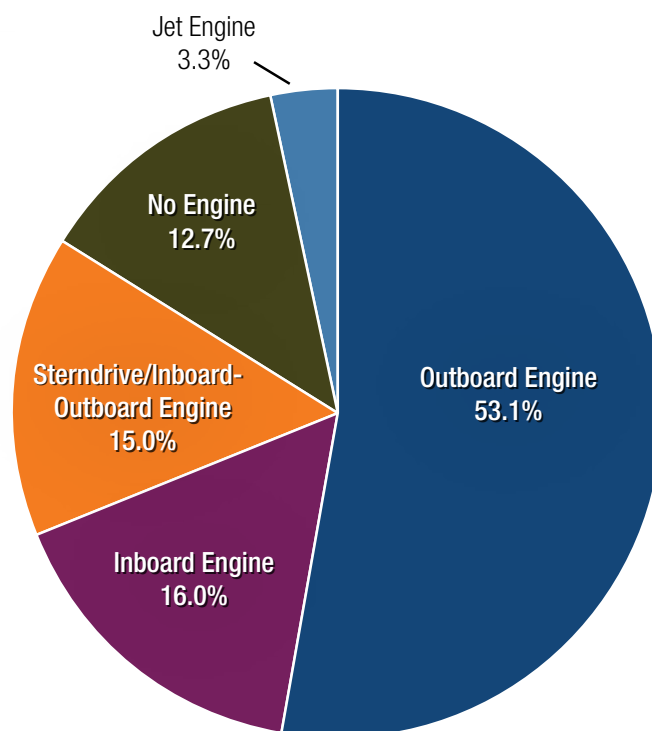
Percent of Boat Owners Considering Repowering their Primary Boat, Ages 16+

New and Previously-Owned Boat Ownership

What Length Is Your Existing Boat?



What Type Of Propulsion Does Your Boat Have?



Where Do You Keep Your Boat During The Boating Season?

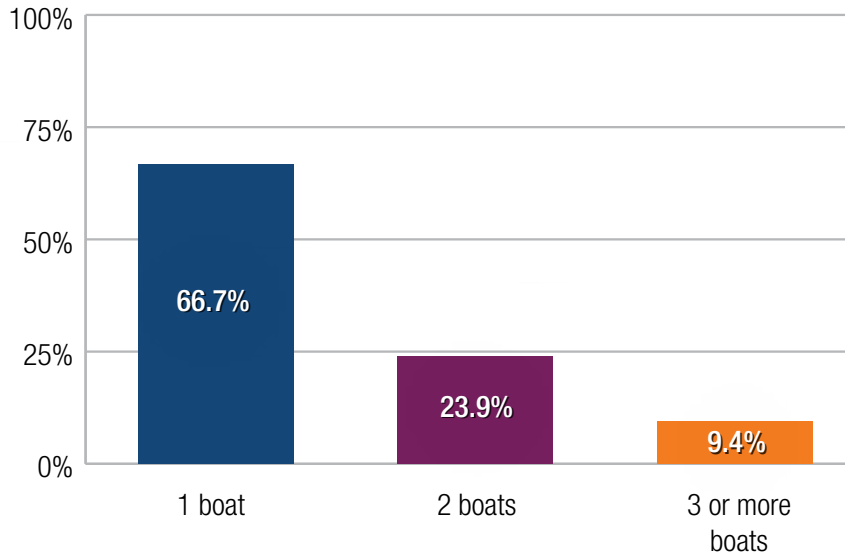
Boat Owners, Ages 16+	
On a trailer at my primary residence	54.9%
On a trailer at a storage facility/marina	7.5%
In the water at a marina less than one hour from my primary residence	5.2%
In the water at a marina one to three hours from my primary residence	0.9%
In the water at a marina more than three hours from my primary residence	0.5%
In the water at a private dock at my primary residence	8.5%
In the water at a private dock at a secondary residence less than one hour from my primary residence	4.2%
In the water at a private dock at a secondary residence one to three hours from my primary residence	2.8%
In the water at a private dock at a secondary residence more than three hours from my primary residence	5.2%
On a trailer at my vacation/second residence	7.5%
Somewhere else	2.8%

How Much Money Did You Spend On Boating, Including Fuel, Finance Payments, Accessories, Maintenance, Repair And Upgrades In 2012?

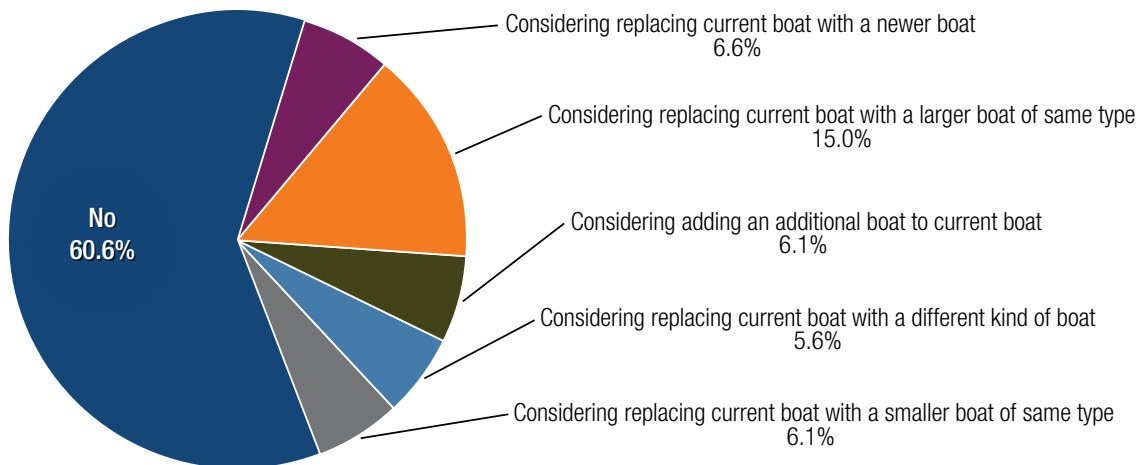
Boat Owners, Ages 16+	
Under \$500	30.5%
\$500 to \$999	15.5%
\$1,000 to \$1,999	18.3%
\$2,000 to \$4,999	17.4%
More than \$5,000	18.3%

Expanding Fleets

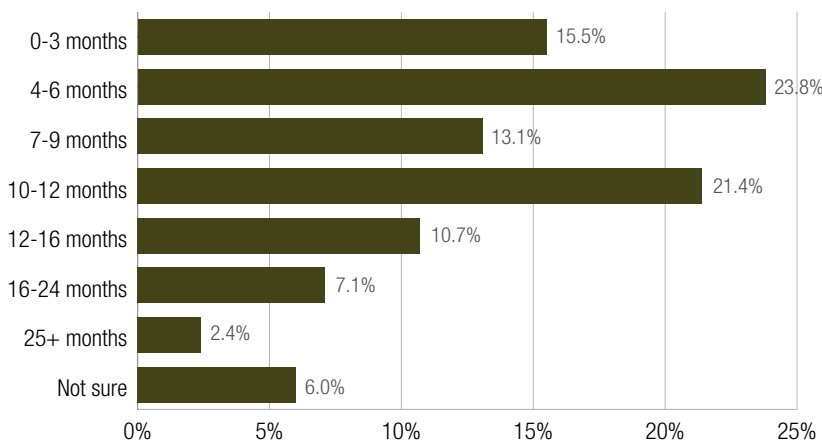
How Many Boats Do You Own?



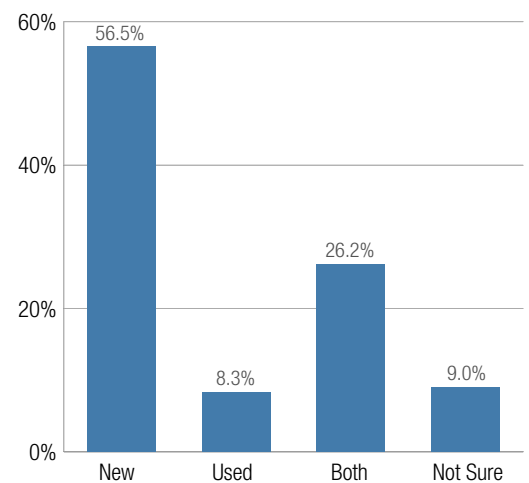
Are You Considering Purchasing Another Boat?



How Soon Are You Considering Making Your Purchase?

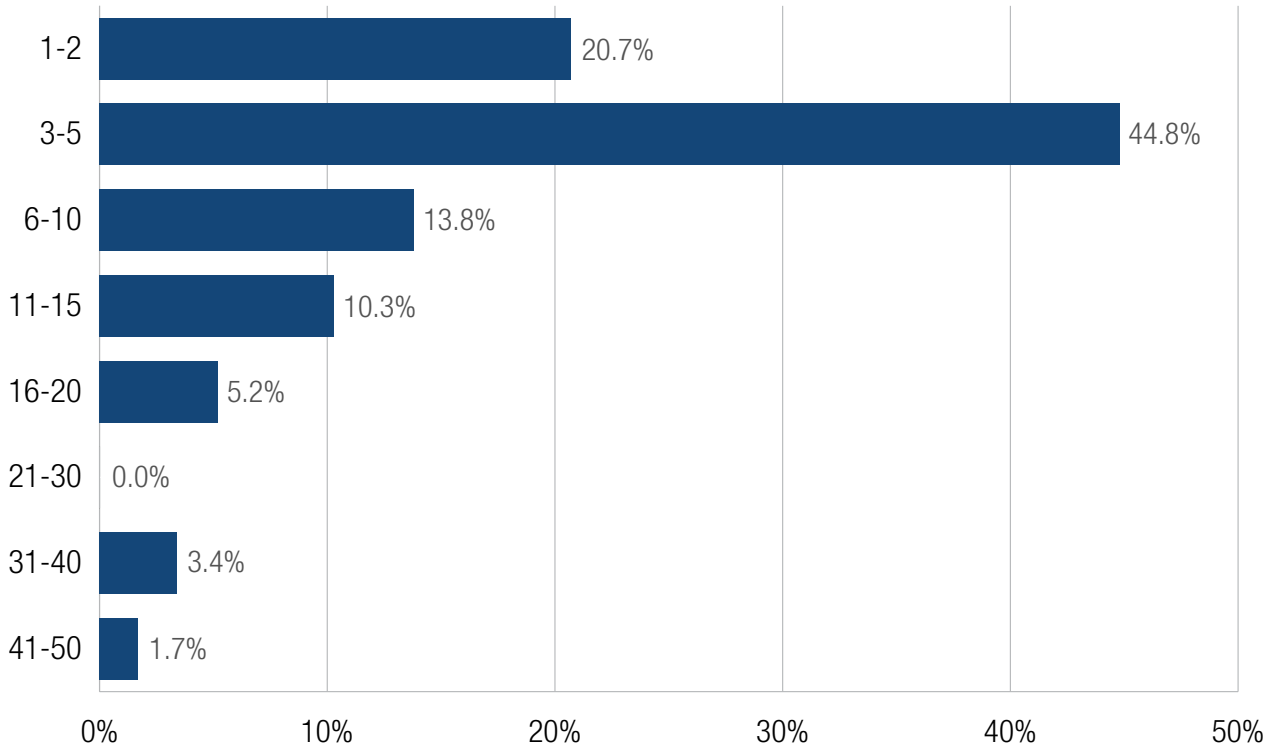


Are You Considering A New Or Pre-Owned Boat?



How Old Is The Engine You Are Considering Replacing?

Engine Age (Years)



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

What Type Of Engine Are You Planning To Purchase In The Next 12 Months?

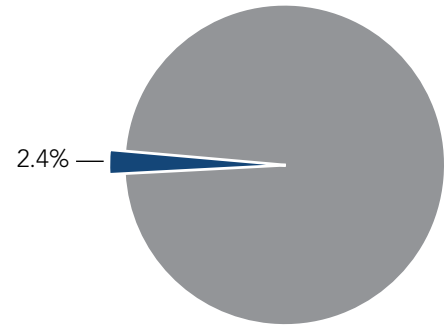
Boat Owners Planning to Buy a New Engine, Ages 16+

Outboard Engine - Gasoline	55.0%
Outboard Engine - Electric	16.7%
Outboard Engine - Diesel	11.7%
Sterndrive Engine - Gasoline	5.0%
Inboard Engine - Gasoline	3.3%
Inboard Engine - Diesel	3.3%
Jet Drive Engine	3.3%
Sterndrive Engine - Diesel	0.0%
Other	1.7%

Considering Boat Ownership for the First Time

Ages 16+

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

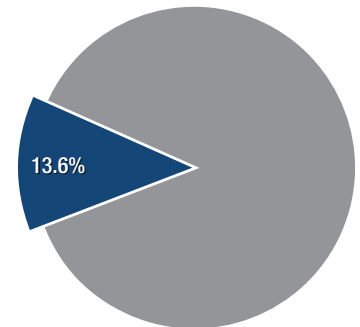


All Americans, Ages 16+, Who Never Owned a Boat

Previous Boat Owners Considering Boat Ownership

Ages 16+

13.6% of previous boat owners are considering owning a boat again.



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

Why do you no longer own a boat?

Boat Owners, Ages 16+

Cost of maintenance/storage	41.1%
Cost of fuel	21.5%
Time constraints	20.6%
No longer live near water	17.8%
Not employed/reduced income	12.1%
Health reasons	7.5%
No/fewer place(s) to launch boat	7.5%
No/fewer place(s) to dock/store the boat	6.5%
Lost interest in boating	5.6%
Lost boating partner (spouse, significant other)	5.6%
Water too shallow for boating	5.6%
Lost boating partner (friend)	2.8%
No longer participate in boating-related activities	1.9%
No/fewer place(s) available for boating	1.9%



BOATING PARTICIPATION

Sixteen percent of Americans ages six and older participated in boating in 2012 making an average 17.2 outings each, or 805.5 million outings in total. This represents a significant increase in average outings over last year, up from 14.2 in 2011.

The most popular boats for these outings are pontoon boats and kayaks, canoes and row boats. More than 50 percent of boating participants spent time only on fresh water.

Males go boating more often than females, getting out an average 24.6 times versus females' 12.8 times. Those with household incomes more than \$100,000 also get out more frequently - 25.7 times on average.



16.3% Participation

16.3 percent of Americans ages six and older, 46.8 million people, participated in boating in 2012.



17.2 Days

Boating participants make an average of 17.2 outings each year.



Freshwater

56 percent of boating participants went boating only on freshwater.

Boating Participation

16.3%

Percentage of Americans ages six and older who went boating in 2012 (46.8 million participants).

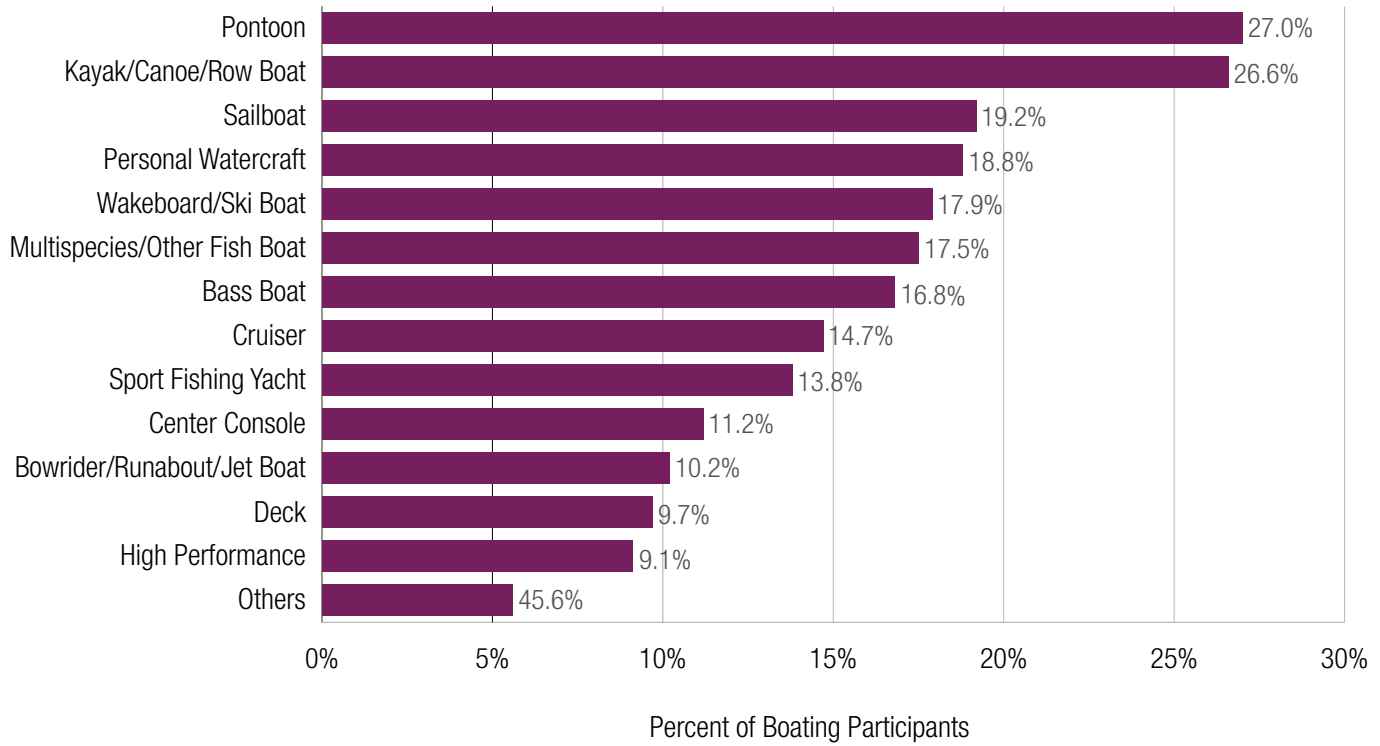
805.5M

Projected number of boating outings made by Americans ages six and older in 2012.

The overall boat ownership rates above are calculated from the Outdoor Foundation's 2013 Outdoor Participation Report, which uses the total population ages six and older.

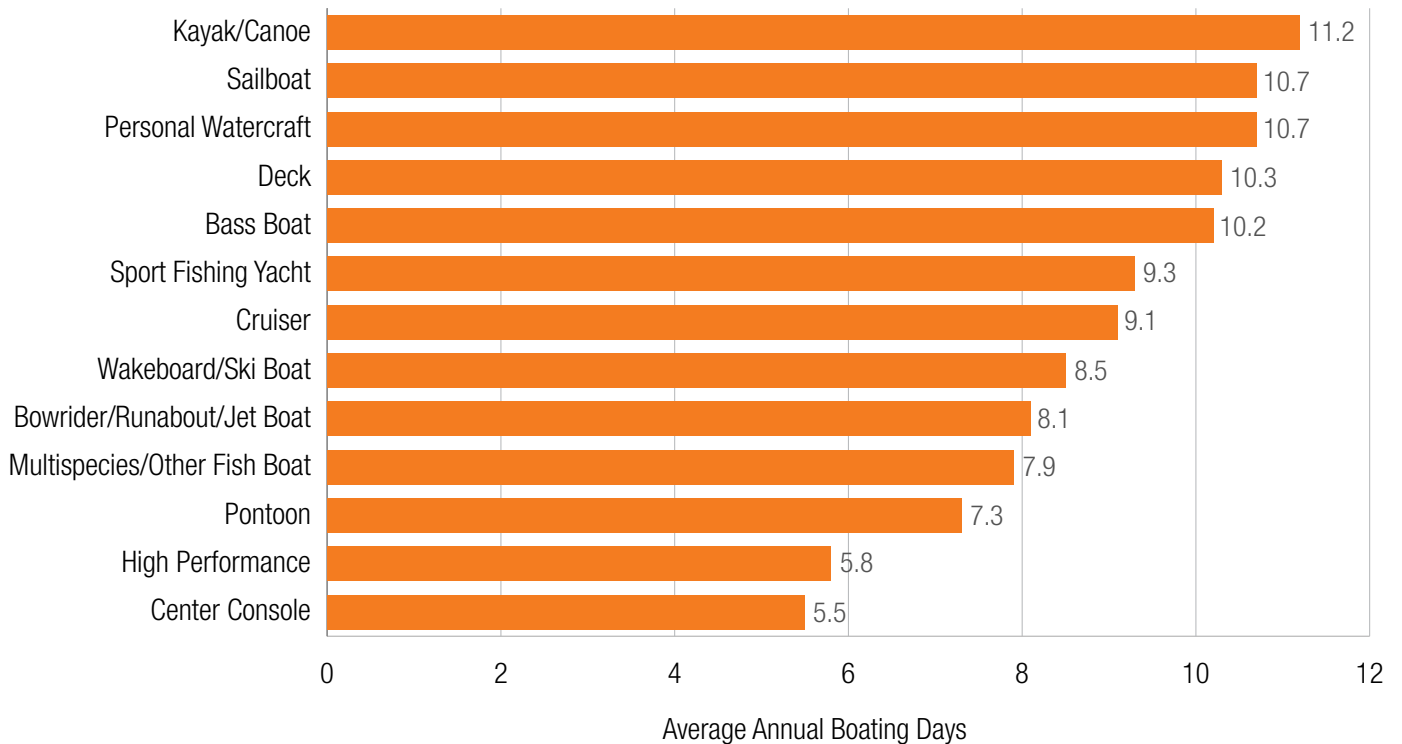
On Which Types of Boats Did You Go Out on the Water?

Ages 16+ in Last 12 Months



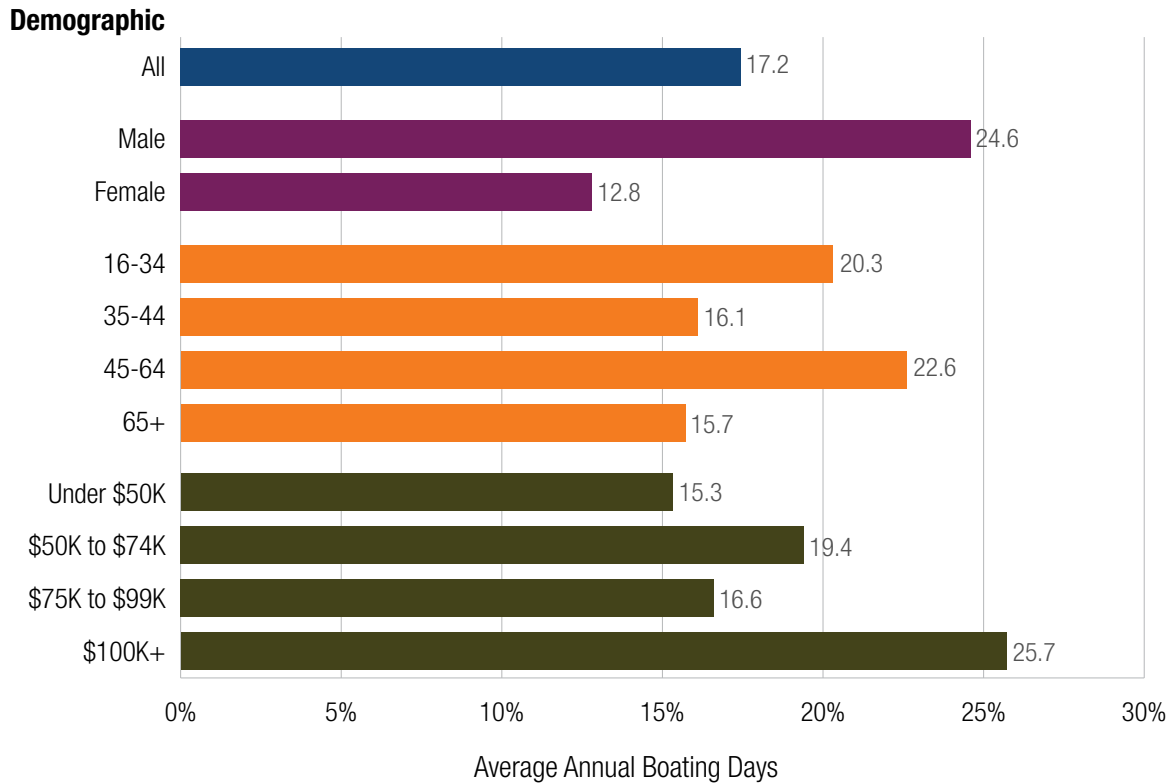
Average Annual Boating Days by Boat Type

Among Boating Participants, Ages 16+



Average Number of Annual Boating Days by Demographic

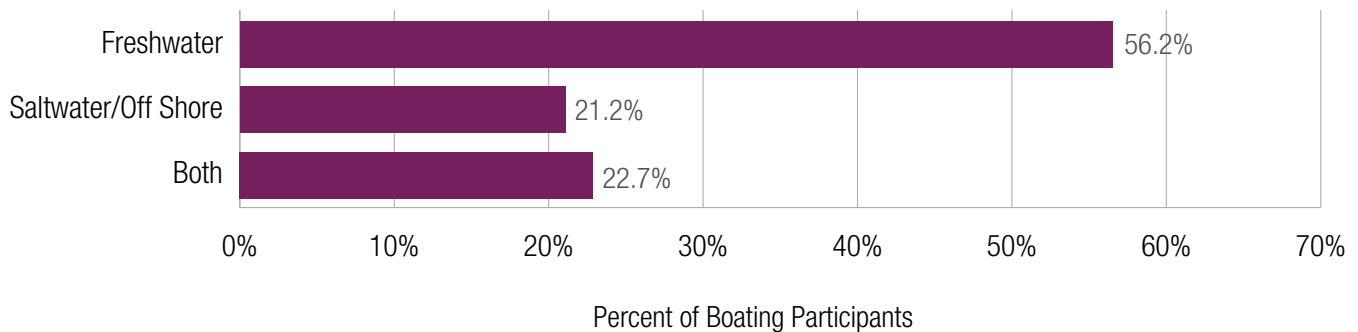
Among Boating Participants, Ages 16+



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

Boating Water Types

Among Boating Participants, Ages 16+



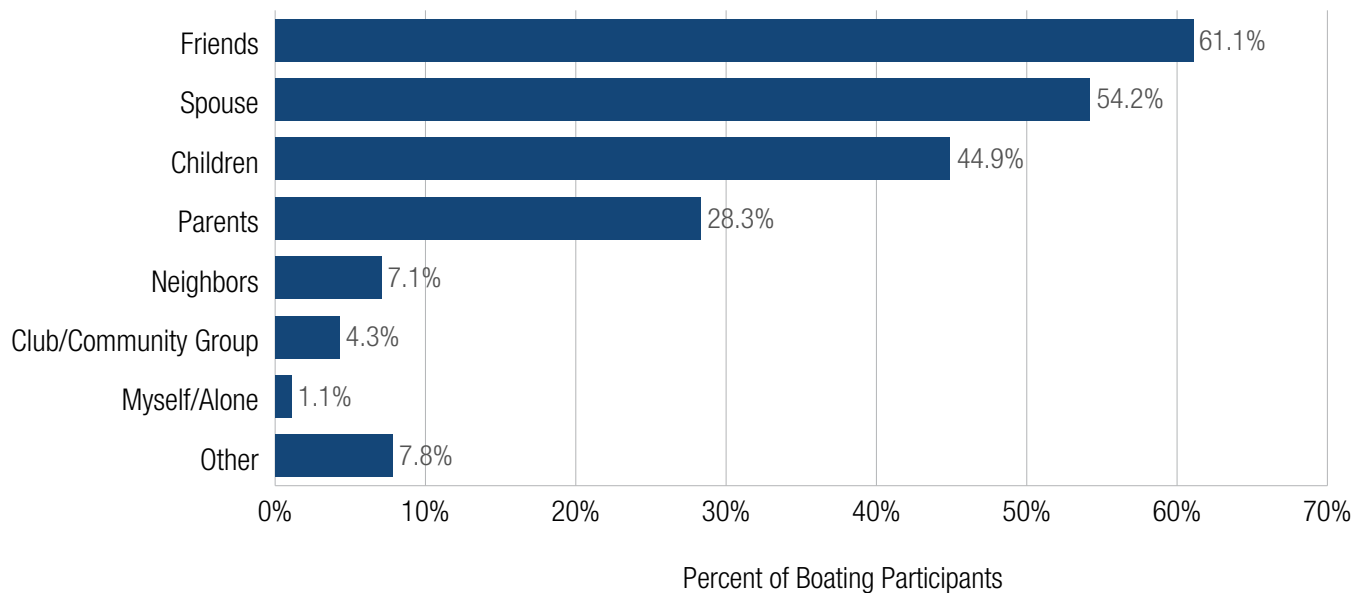
Percentage of Boating Participants Who Personally Commanded or Operated a Boat by Type

Ages 16+

	All	Males	Females
Kayak/Canoe	94.3%	94.0%	95.0%
Personal Watercraft	86.2%	98.1%	68.6%
Deck	77.8%	86.7%	60.0%
High Performance	73.8%	92.0%	47.1%
Bowrider/Runabout/Jet Boat	68.1%	79.3%	50.0%
Cruiser	67.6%	78.7%	42.9%
Center Console	67.3%	75.0%	41.7%
Bass Boat	66.7%	79.6%	37.5%
Wakeboard/Ski Boat	65.1%	87.2%	36.1%
Sailboat	62.9%	69.8%	52.8%
Multispecies/Other Fish Boat	60.5%	71.2%	31.8%
Sport Fishing Yacht	51.6%	56.5%	38.9%
Pontoon	48.8%	64.4%	26.9%
Other	69.2%	82.4%	44.4%

Boating Companions

Among Boating Participants, Ages 16+



BOATING ACTIVITIES

Forty-five percent of boaters ages six and older involve boating in more than a quarter of their recreational activities. These activities vary from fishing to whitewater paddling.

Fishing, cruising and swimming are the most popular activities among males and cruising, sunbathing, fishing, entertaining and nature watching are the most popular activities among females.

Fishing, popular among both males and females, takes place on 58 percent of boating outings, and 44 percent of fishing outings occur on a boat. Forty-eight percent of fishing participants fished from a boat at least once in 2012.



Fishing & Cruising

Fishing is the most popular boating activity among males and cruising is the most popular activity among females.



Active Boaters

45 percent of boating participants involve boats for more than a quarter of their recreational activities.

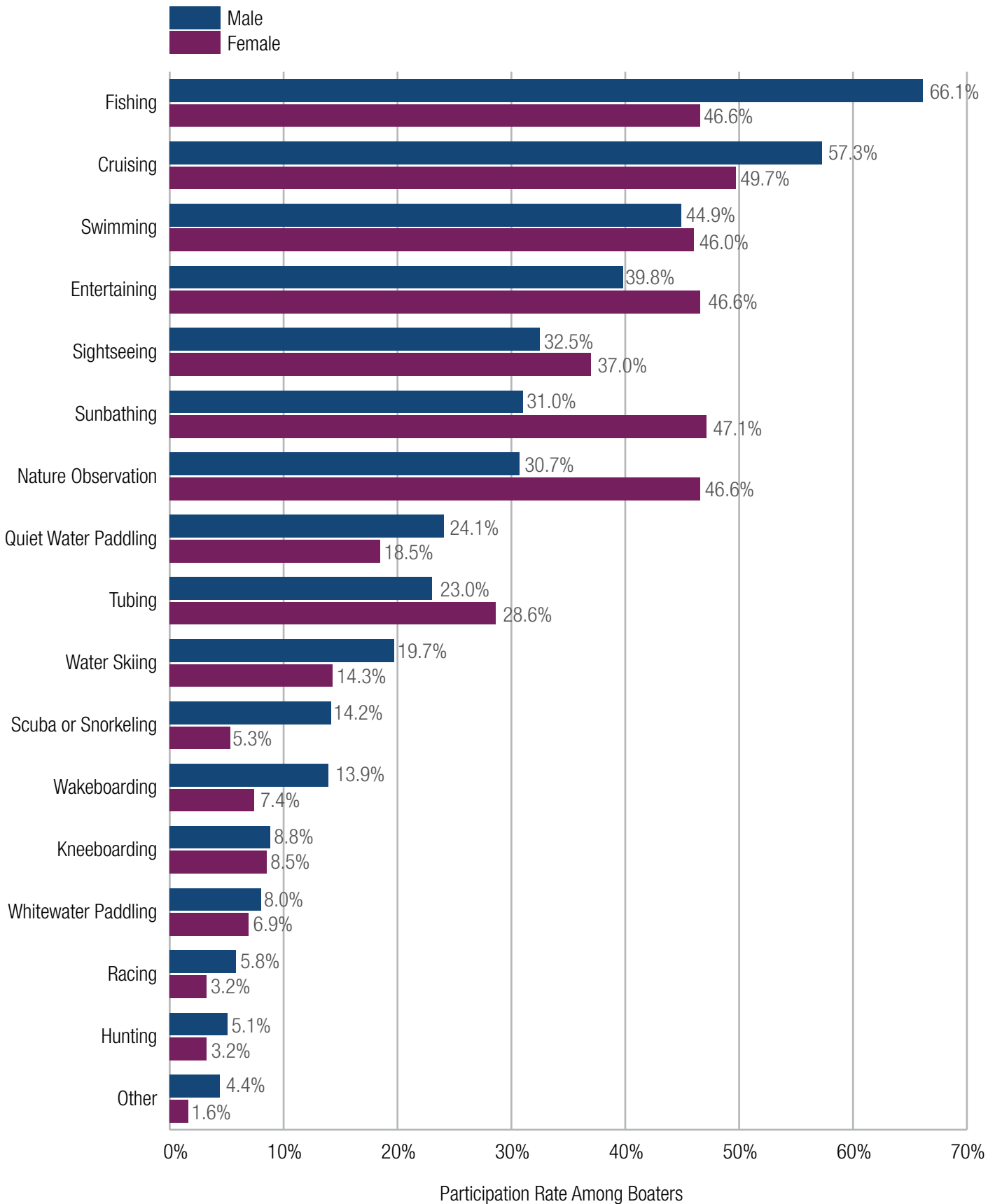


Vacation Rentals

More than 40 percent of boating participants rented or chartered a boat while on vacation.

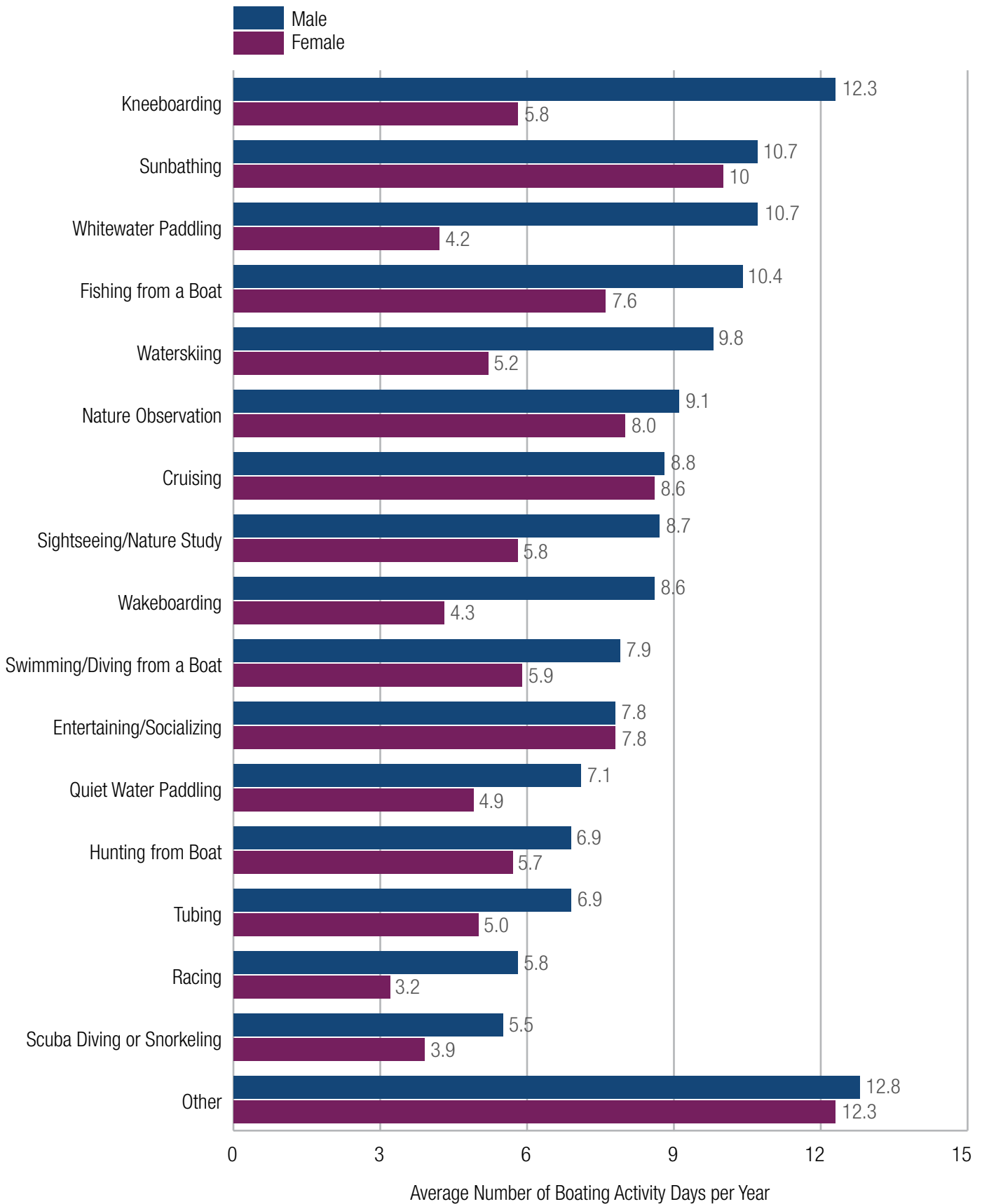
Participation in Boating Activities by Gender

Among Boating Participants, Ages 16+



Boating Activity Days by Gender

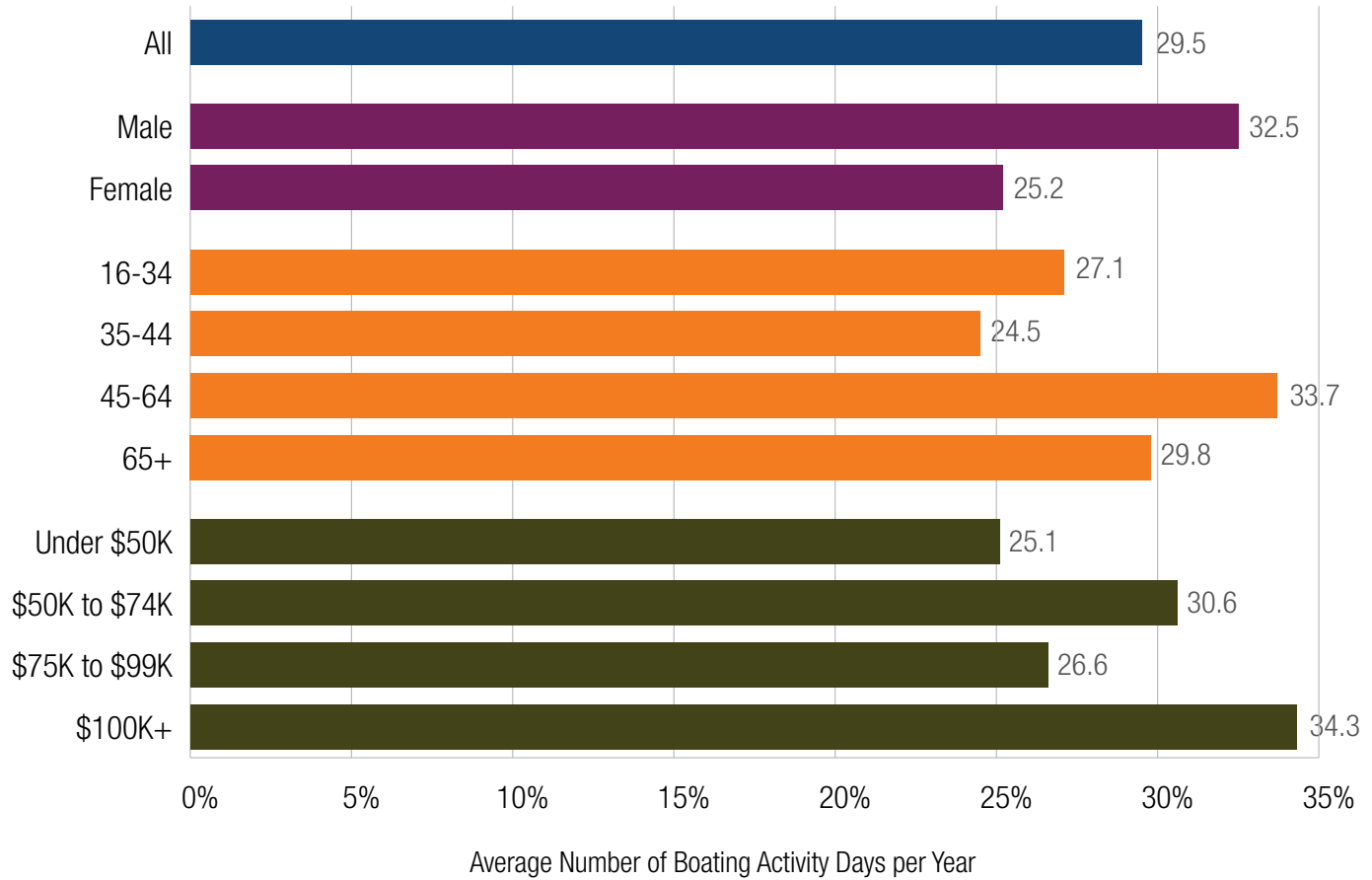
Among Boating Participants, Ages 16+



Participation in Boating Activities by Demographic

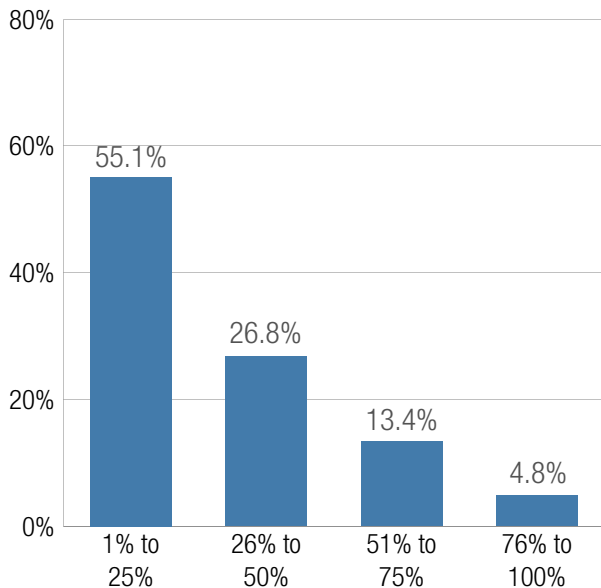
Among Boating Participants, Ages 16+

Demographic



Percentage of Recreational Activities Involving a Boat

Among Boating Participants, Ages 6+

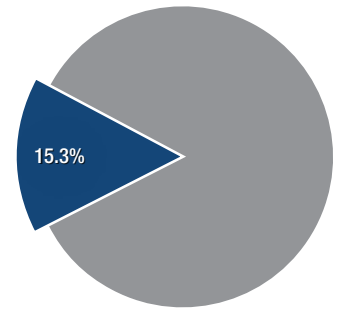


Percent of Recreational Activities Using a Boat, Ages 6+

Boating Club Memberships

Among Boating Participants, Ages 6+

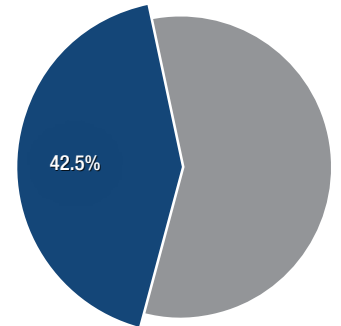
15.3% of boating participants belonged to a boating club that provides boats for a fee, up 9.1 percentage points from 6.2 percent in 2011.



Vacation Charters/Rentals

Among Boating Participants, Ages 16+

42.5% of boating participants rented or chartered a boat while on vacation in 2012, up 24.3 percentage points from 18.2 percent in 2011.



Fishing and Boating Outings

Ages 16+

	2012
Number of Boating Outings	669,908,062
Number of Fishing Outings	877,558,000
Number of Fishing Outings from a Boat	389,216,584
Percentage of Boating Outings with Fishing	58.1%
Percentage of Fishing Outings that were on a Boat	44.4%
Percentage of Fishing Participants who Fished from a Boat at least Once in 2012	48.1%



Method

Each year the Physical Activity Council (PAC) carries out the largest sports participation study in the USA. During January and February 2013, a total of 42,363 online interviews were carried out with a nationwide sample of individuals and households from the US Online Panel operated by Synovate/IPSOS. A total of 15,770 individual and 26,593 household surveys were completed. The total panel has more than one million members and maintained to be representative of the U.S. population age six and older.

In March of 2013, a total of 503 respondents from the PAC Study ages 16 and older were selected for follow-up interviews on boating participation. Results from these interviews provide nationally representative data on boating participation among all Americans and can be projected to produce national numbers.

Throughout the analysis, a weighting technique was used in order for the data to better represent the 2012 US population of 287,138,000 ages six and over. Variables used for the analysis included age, gender, income, household size, region, population density and panel join date.

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 respondent's age 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 2013 participation survey, which focused on American participation in the 2012 calendar year.





A partnership
project of:

