PADDLESPORTS

Paddlesports offer some of the most diverse outdoor experiences of any nature-based activity — giving participants the freedom to explore the rivers, lakes, streams and other waterways in their local communities and across the country. More than 6 percent of Americans participated in paddling in 2008 — totaling over 17.8 million individuals. On average, each paddler takes 10 trips a year, contributing to 174 million annual paddling outings.

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

### Participation in Paddlesports

#### All Participants Ages 6+

<table>
<thead>
<tr>
<th>Year</th>
<th>Participation Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>2006</td>
<td>4.7%</td>
</tr>
<tr>
<td>2007</td>
<td>6.3%</td>
</tr>
<tr>
<td>2008</td>
<td>6.4%</td>
</tr>
</tbody>
</table>

#### 2008 Participants

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

### Annual Outings

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

An average 10 outings per participant

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

Paddlers clearly prefer to participate in other outdoor activities rather than spend time with team sports or indoor fitness activities. Interestingly, fitness walking, backyard and car camping, hiking, free weights and freshwater fishing are particularly popular. Team sports ranked especially low among paddling enthusiasts — providing a valuable insight into the independent streak of many paddlers.

### Crossover Participation

- **Walking (Fitness)**: 54%
- **Bowling**: 45%
- **Free Weights**: 40%
- **Billiards/Pool**: 40%
- **Treadmill**: 31%
- **Weight/Resistance Machines**: 29%
- **Golf**: 28%
- **Stationary Cycling**: 26%
- **Stretching**: 24%
- **Elliptical Motion Trainers**: 21%
- **Aerobics**: 20%
- **Backyard and Car Camping**: 45%
- **Hiking**: 43%
- **Freshwater Fishing**: 40%
- **Road/Paved Surface Bicycling**: 37%
- **Running/Jogging**: 33%
- **Wildlife Viewing**: 27%
- **Darts**: 25%
- **Table Tennis**: 23%
- **Tennis**: 22%
- **RV Camping**: 18%
- **Basketball**: 20%
- **Football**: 20%
- **Volleyball**: 19%
- **Baseball**: 15%
- **Soccer**: 15%
- **Softball**: 13%
- **Ice Hockey**: 4%

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

The most popular style of kayaking is recreational kayaking, followed (by a significant margin) by sea/touring kayaking and whitewater kayaking. Most kayakers live in states bordering the Atlantic and Pacific Ocean — the New England, Middle Atlantic, South Atlantic and Pacific regions of the United States. Overall, 7.8 million Americans participated in kayaking in 2008.
Annual Outings

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

10 days

Kayakers made an average of 10 outings each in 2008.

Participation in Kayaking by Age
Whitewater, Sea/Touring and Recreational Kayaking

Participation Rate by Age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>2006</th>
<th>2007</th>
<th>2008</th>
</tr>
</thead>
<tbody>
<tr>
<td>ages 6-12</td>
<td>2.1%</td>
<td>2.0%</td>
<td>2.0%</td>
</tr>
<tr>
<td>ages 13-17</td>
<td>2.4%</td>
<td>3.5%</td>
<td>4.0%</td>
</tr>
<tr>
<td>ages 18-24</td>
<td>1.9%</td>
<td>3.7%</td>
<td>4.2%</td>
</tr>
<tr>
<td>ages 25-44</td>
<td>1.8%</td>
<td>2.7%</td>
<td>3.4%</td>
</tr>
<tr>
<td>ages 45+</td>
<td>1.2%</td>
<td>1.8%</td>
<td>2.0%</td>
</tr>
</tbody>
</table>

Average Annual Outings by Age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Outings</th>
</tr>
</thead>
<tbody>
<tr>
<td>ages 6-12</td>
<td>12 days</td>
</tr>
<tr>
<td>ages 13-17</td>
<td>9 days</td>
</tr>
<tr>
<td>ages 18-24</td>
<td>11 days</td>
</tr>
<tr>
<td>ages 25-44</td>
<td>10 days</td>
</tr>
<tr>
<td>ages 45+</td>
<td>9 days</td>
</tr>
</tbody>
</table>
Demographics
Division of Kayaking Participants by Demographic

- **Age**
  - 6-12: 7%
  - 13-17: 12%
  - 18-24: 15%
  - 25-44: 36%
  - 45+: 30%

- **Income**
  - Less than $25,000: 11%
  - $25,000 to $49,999: 14%
  - $50,000 to $74,999: 17%
  - $75,000 to $99,999: 16%
  - $100,000+: 41%

- **Gender**
  - Male: 56%
  - Female: 44%

- **Ages 6 and Older**
  - Participation in Kayaking by Gender

- **Education**
  - Not Specified: 1%
  - High School Graduate: 22%
  - 1 to 3 Years College: 7%
  - College Graduate: 30%
  - Post-Graduate: 21%

- **Ethnicity**
  - African American: 2%
  - Hispanic: 5%
  - Caucasian/White: 82%
  - Asian/Pacific Islander: 8%
  - Other 3%

- **Income by Ages**
  - Ages 6-12: 48%
  - Ages 6-12: 52%
  - Ages 13-17: 32%
  - Ages 13-17: 68%
  - Ages 18-24: 57%
  - Ages 18-24: 43%
  - Ages 25-44: 44%
  - Ages 25-44: 56%
  - Ages 45+: 41%
  - Ages 45+: 59%

www.outdoorfoundation.org
Participation in Kayaking by Census Region
All Americans, Ages 6 and Older

Pacific
Participation Rate: 2.9%
Percent of US Participants: 16.5%

Mountain
Participation Rate: 2.0%
Percent of US Participants: 5.0%

West North Central
Participation Rate: 2.2%
Percent of US Participants: 5.2%

West South Central
Participation Rate: 1.5%
Percent of US Participants: 6.3%

East North Central
Participation Rate: 2.6%
Percent of US Participants: 14.1%

East South Central
Participation Rate: 1.3%
Percent of US Participants: 2.8%

New England
Participation Rate: 7.6%
Percent of US Participants: 13.0%

Middle Atlantic
Participation Rate: 3.4%
Percent of US Participants: 16.3%

South Atlantic
Participation Rate: 3.0%
Percent of US Participants: 20.9%
Rafting participation is lower than participation in kayaking and canoeing and, more than any other paddlesport, is dominated by casual participants. Perhaps due to destination-based guide services, permit restrictions and seasonal water levels, 43 percent of rafters make only one outing per year and 74 percent make three outings or less.

Overall, participation in rafting remains relatively steady and is even increasing among adults ages 25 to 44. However participation has declined among youth ages 6 to 17 over the past two years — following a nationwide trend among youth seen in other outdoor activities.
Annual Outings

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

6 days

Rafters made an average of six outings each in 2008.

Participation in Rafting by Age
Years 2006, 2007 and 2008

Participation Rate

- 1 Time: 43%
- 2-3 Times: 31%
- 4-5 Times: 9%
- 6-11 Times: 9%
- 12-23 Times: 3%
- 24+ Times: 5%

Average Annual Outings by Age

- 3 days
- 5 days
- 5 days
- 7 days
- 6 days
Demographics

Division of Rafting Participants by Demographic

Participation in Rafting by Gender

- Female 40%
- Male 60%

Ages 6 and Older

- Ages 6-12: 34% Female, 66% Male
- Ages 13-17: 39% Female, 61% Male
- Ages 18-24: 43% Female, 57% Male
- Ages 25-44: 37% Female, 63% Male
- Ages 45+: 43% Female, 57% Male

Income

- Less than $25,000: 20%
- $25,000 to $49,999: 20%
- $50,000 to $74,999: 18%
- $75,000 to $99,999: 16%
- $100,000+: 34%

Age

- 6-12: 25%
- 13-17: 26%
- 18-24: 26%
- 25-44: 21%
- 45+: 7%

Ethnicity

- Caucasian/White 81%
- Asian/Pacific Islander 8%
- African American/Black 3%
- Other 5%
- Not Specified 1%

Education

- Post-Graduate 4%
- College Graduate 26%
- 1 to 3 Years College 21%
- High School Graduate 11%
- 1 to 3 Years High School 16%
Participation in Rafting by Census Region
All Americans, Ages 6 and Older

Pacific
Participation Rate: 1.9%
Percent of US Participants: 18.1%

Mountain
Participation Rate: 2.7%
Percent of US Participants: 11.6%

West North Central
Participation Rate: 1.3%
Percent of US Participants: 5.3%

West South Central
Participation Rate: 1.3%
Percent of US Participants: 8.6%

East North Central
Participation Rate: 1.5%
Percent of US Participants: 13.5%

East South Central
Participation Rate: 1.8%
Percent of US Participants: 6.3%

New England
Participation Rate: 1.3%
Percent of US Participants: 3.8%

Middle Atlantic
Participation Rate: 1.7%
Percent of US Participants: 13.5%

South Atlantic
Participation Rate: 1.6%
Percent of US Participants: 19.2%
Canoeing is the most popular type of paddling. Over the past three years it has experienced steady participation among Americans ages 6 and older.

Although canoeing is more popular than kayaking, kayakers get out more frequently and have more annual outings — 77.4 million compared to 69.5 million.

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

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

7 days

Canoers made an average of seven outings each in 2008.
**Demographics**

Division of Canoeing Participants by Demographic

- **Age**
  - 6-12: 13%
  - 13-17: 12%
  - 18-24: 13%
  - 25-44: 34%
  - 45+: 28%

- **Income**
  - Less than $25,000: 11%
  - $25,000 to $49,999: 19%
  - $50,000 to $74,999: 21%
  - $75,000 to $99,999: 13%
  - $100,000+: 36%

- **Gender**
  - Male: 60%
  - Female: 40%

- **Income**
  - Ages 6 and Older
    - Male: 64%
    - Female: 36%
  - Ages 6-12
    - Male: 64%
    - Female: 36%
  - Ages 13-17
    - Male: 64%
    - Female: 36%
  - Ages 18-24
    - Male: 45%
    - Female: 55%
  - Ages 25-44
    - Male: 59%
    - Female: 41%
  - Ages 45+
    - Male: 62%
    - Female: 38%
Participation in Canoeing by Census Region
All Americans, Ages 6 and Older

Pacific
Participation Rate: 1.9%
Percent of US Participants: 8.6%

Mountain
Participation Rate: 2.2%
Percent of US Participants: 4.4%

West North Central
Participation Rate: 5.5%
Percent of US Participants: 10.4%

West South Central
Participation Rate: 2.4%
Percent of US Participants: 7.8%

East North Central
Participation Rate: 4.7%
Percent of US Participants: 20.5%

East South Central
Participation Rate: 3.7%
Percent of US Participants: 6.3%

New England
Participation Rate: 6.2%
Percent of US Participants: 8.4%

Middle Atlantic
Participation Rate: 3.5%
Percent of US Participants: 13.2%

South Atlantic
Participation Rate: 3.7%
Percent of US Participants: 20.6%
## MOTIVATIONS

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

### What Gets Paddlers Outdoors?

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

*What motivates you to participate in outdoor activities?*
### Who Introduces Paddlers to Outdoor Activities?

<table>
<thead>
<tr>
<th>Category</th>
<th>Kayakers (All)</th>
<th>Rafters</th>
<th>Canoers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friends</td>
<td>50%  ➊</td>
<td>51%  ➋</td>
<td>48%  ➌</td>
</tr>
<tr>
<td>Parents</td>
<td>31%  ➋</td>
<td>35%  ➋</td>
<td>41%  ➋</td>
</tr>
<tr>
<td>Myself (no one else influenced me)</td>
<td>30%  ➌</td>
<td>26%  ➍</td>
<td>26%  ➍</td>
</tr>
<tr>
<td>Brothers, sisters, or other relatives</td>
<td>27%  ➍</td>
<td>31%  ➋</td>
<td>28%  ➋</td>
</tr>
<tr>
<td>Community program (Boy Scouts, YMCA, neighborhood program)</td>
<td>11%  ➎</td>
<td>13%  ➋</td>
<td>16%  ➋</td>
</tr>
<tr>
<td>TV, movies, magazines, books, websites about the outdoors</td>
<td>8%</td>
<td>8%</td>
<td>7%</td>
</tr>
<tr>
<td>Experienced mentor (trained and skilled)</td>
<td>8%</td>
<td>11%</td>
<td>6%</td>
</tr>
<tr>
<td>School program</td>
<td>7%</td>
<td>7%</td>
<td>7%</td>
</tr>
<tr>
<td>Media icon, sports figure, accomplished athlete</td>
<td>3%</td>
<td>4%</td>
<td>2%</td>
</tr>
<tr>
<td>Outdoor education program such as Outward Bound</td>
<td>3%</td>
<td>4%</td>
<td>3%</td>
</tr>
</tbody>
</table>

*Who influenced your decision to participate in outdoor activities?
## BARRIERS

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

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

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

A weighting technique was used to balance the data to reflect the total US population aged six and above. The following variables were used: gender, age, income, household size, region and population density. The total population figure used was 279,568,000 people aged six and above. The report details participation among all Americans, ages six and older.

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

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

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