



OUTDOOR RECREATION PARTICIPATION STUDY™

SEVENTH EDITION, FOR YEAR 2004
Trend Analysis for the United States
Published June 2005



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OutdoorRetailer

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study possible.



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OUTDOOR RECREATION PARTICIPATION STUDY
FEMALE PARTICIPATION

FEMALE PARTICIPATION

FEMALES: PARTICIPANT LEVELS

Activity	Incidence of Participation Among Female Americans 16 and Older in 2004	Participant Population (Millions)	Participation Incidence % Change - 2004 vs.1998	Participation Incidence % Change - 2004 vs.2002	Participation Incidence % Change - 2004 vs.2003
Human Powered Activities - Any Type	63.7%	73.2	NA	NA	NA
Backpacking	3.1%	3.6	-29.5%	-18.4%	-16.2%
Bicycling - Any Type	33.6%	38.6	NA	-5.1%	-3.7%
Bicycling - Paved Road	31.1%	35.7	-9.6%	+8.4%	-1.0%
Bicycling - Single Track	12.3%	14.1	-19.1%	-19.6%	-9.6%
Bicycling - Wide Dirt Road	13.1%	15.1	-19.1%	-5.1%	-4.4%
Bicycling (Mountain Biking)	17.4%	20.0	-17.1%	-12.8	-8.4
Bird Watching	7.1%	8.2	NA	-18.4%	+7.6%
Camping - Any Type	24.3%	27.9	NA	-6.9%	-9.3%
Car Camping	19.9%	22.9	-15.7%	-3.4%	-11.2%
Camping (Away from Car)	4.1%	4.7	No Change	-25.5%	-6.8%
Climbing with Rope/Harness - Any Type	2.0%	2.3	NA	-31.0%	-20.0%
Climbing - Natural Rock	0.6%	0.689	-60.0%	-64.7%	-40.0%
Climbing - Artificial Wall	1.7%	2.0	NA	-29.2%	-15.0%
Climbing - Ice	0.2%	0.230	NA	-66.7%	No Change
Cross-Country/Nordic Skiing	4.1%	4.7	+2.5%	-26.8%	+7.9%
Fishing - Any Type	26.2%	30.1	NA	NA	NA
Fishing (Non-Fly)	24.6%	28.3	NA	NA	NA
Fly Fishing	5.5%	6.3	NA	+71.9%	+77.4%
Hiking	30.6%	35.2	-4.1%	-2.2%	+7.0%
Paddlesports - Any Type	11.3%	13.0	NA	-11.7%	-5.8%
Canoeing	7.8%	9.0	+2.6%	-8.2%	No Change
Rafting	3.1%	3.6	-13.9%	-27.9%	-20.5%
Kayaking - Any Type	3.7%	4.3	+117.6%	No Change	+5.7%
Kayaking - Recreation/Sit-on-Top	2.5%	2.9	NA	No Change	+13.6%
Kayaking - Touring/Sea	2.3%	2.6	NA	-20.7%	+4.5%
Kayaking - Whitewater	0.6%	0.689	NA	-50.0%	No Change
Kayaking -(Non-Whitewater)	3.5%	4.0	NA	No Change	16.7%
Snowshoeing	1.3%	1.5	+62.5%	-27.8%	-38.1%
Telemark Skiing	1.0%	1.1	+42.9%	No Change	-23.1%
Trail Running	13.7%	15.7	+5.4%	+0.7%	+7.9%

FEMALES: DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

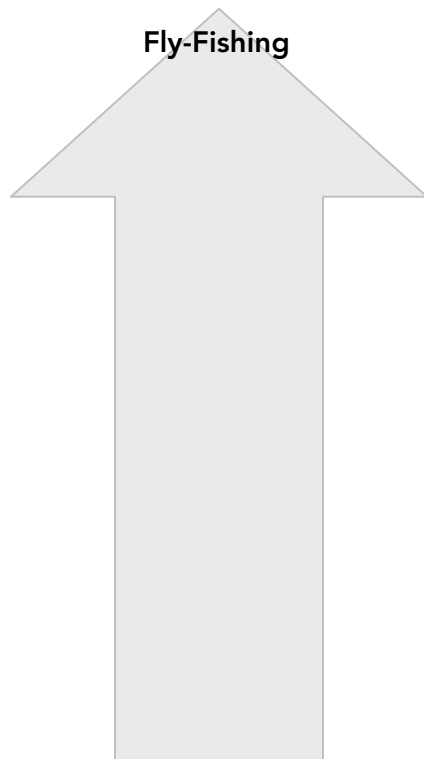
- Females of all ages participated in human powered activities during 2004, but the population skews older (33% are 45 years of age or older).
- The year 2004 female Participant population is comprised of fewer Americans than in 2002 who classify their ethnicity as Caucasian.
- Historically, female Participants are most likely to live in the South Central and North Central regions of the United States.

Dimension	1998	1999	2000	2001	2002	2003	2004
Gender							
Male	0%	0%	0%	0%	0%	0%	0%
Female	100%	100%	100%	100%	100%	100%	100%
Age							
16 to 24	24%	21%	22%	25%	25%	25%	23%
25 to 34	22%	25%	25%	23%	21%	21%	24%
35 to 44	22%	26%	24%	20%	19%	20%	20%
45+	32%	28%	29%	32%	35%	34%	33%
Marital Status							
Married	55%	51%	52%	51%	54%	53%	53%
Unmarried	45%	49%	48%	49%	46%	47%	47%
Ethnicity							
Caucasian	89%	84%	85%	84%	84%	80%	79%
African-American	4%	4%	6%	5%	7%	7%	8%
Hispanic	2%	1%	4%	5%	5%	7%	5%
Asian	1%	*	2%	1%	2%	2%	1%
Other	4%	11%	3%	5%	2%	4%	7%
Children <18							
Yes	45%	48%	50%	51%	47%	52%	52%
Household Income							
<\$40k	40%	39%	40%	39%	41%	41%	41%
\$40k - \$79k	36%	35%	40%	39%	39%	37%	37%
\$80k+	24%	26%	20%	22%	20%	22%	22%
Region							
Northeast	18%	20%	20%	19%	17%	19%	18%
South Central	30%	29%	28%	29%	30%	33%	34%
North Central	27%	26%	29%	27%	28%	26%	26%
West	25%	25%	23%	25%	25%	22%	22%

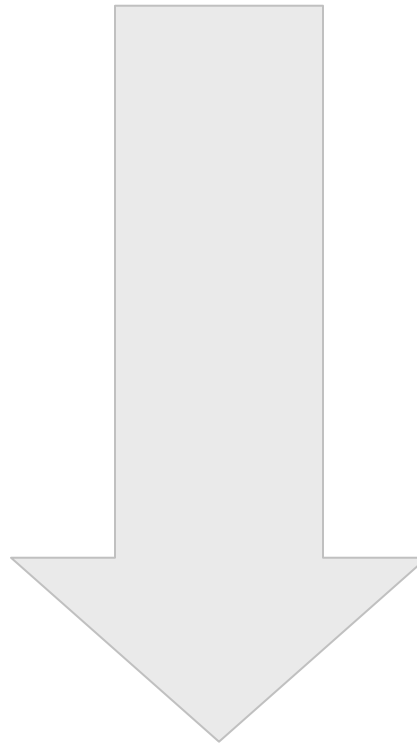
☐ = Significant difference from 2002

FEMALES: PARTICIPANT TRENDS – 2004 COMPARED TO 2003*

GREW*



DECLINED*



FLAT*

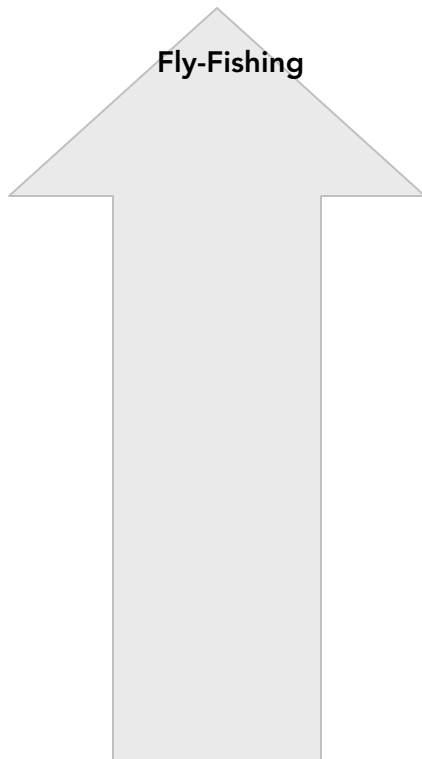
-
- Backpacking
 - Paved Road Bicycling
 - Single Track Bicycling
 - Dirt Road Bicycling
 - Bird Watching
 - Car Camping
 - Camping (Away from Car)
 - Natural Rock Climbing
 - Artificial Wall Climbing
 - Ice Climbing
 - Cross-Country/Nordic Skiing
 - Hiking
 - Canoeing
 - Rafting
 - Recreation/Sit-on-Top Kayaking
 - Touring/Sea Kayaking
 - Whitewater Kayaking
 - Snowshoeing
 - Telemark Skiing
 - Trail Running

Note: Comparative data from 2003 not available for fishing (non-fly).

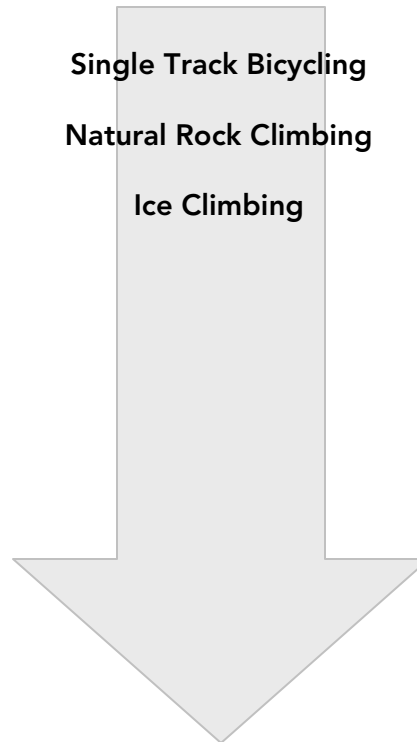
* Conclusions based on significant differences between Participant incidence in 2004 and 2003

FEMALES: PARTICIPANT TRENDS – 2004 COMPARED TO 2002*

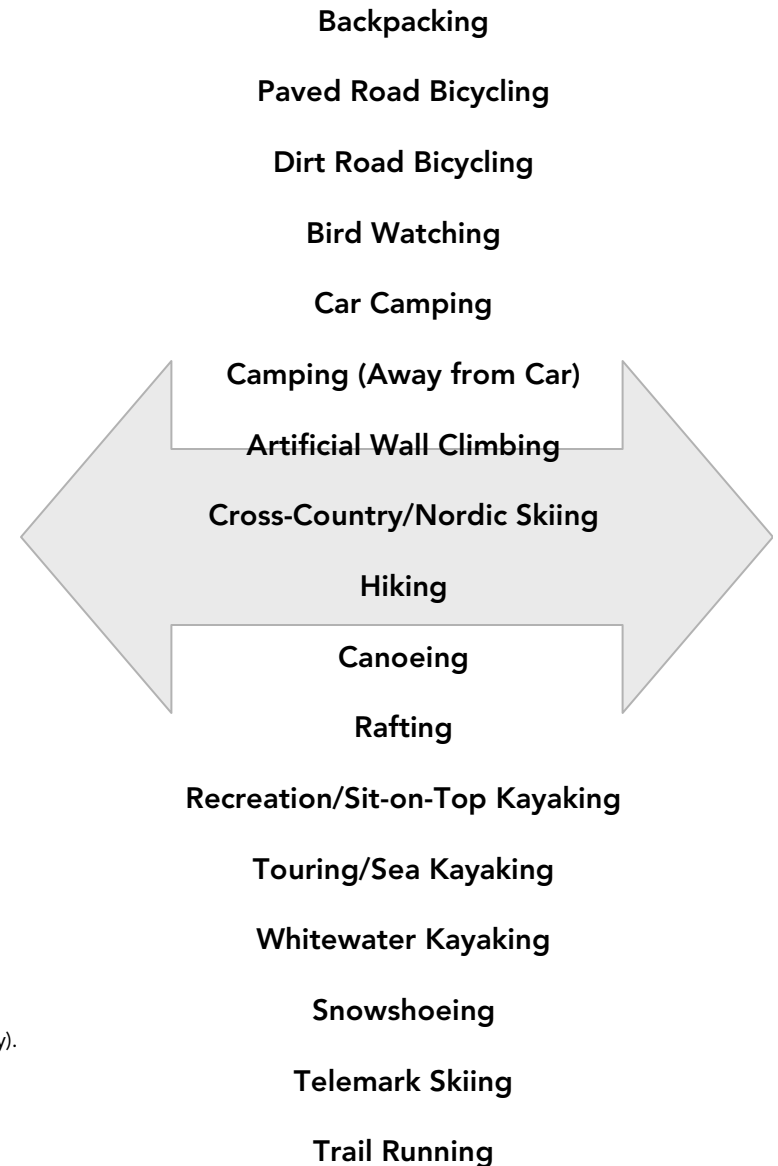
GREW*



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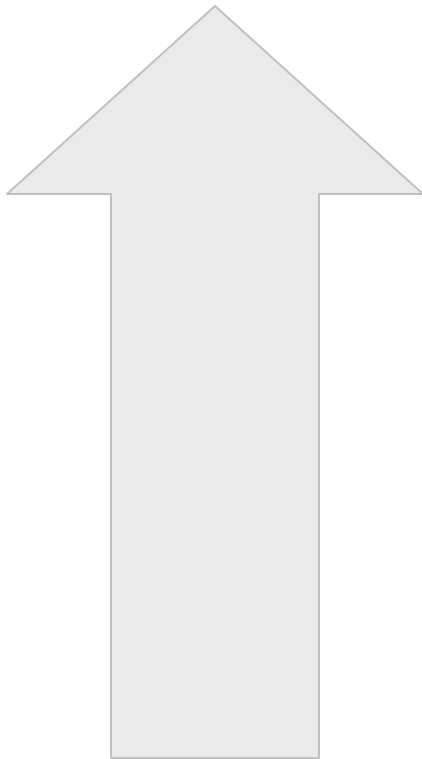


Note: Comparative data from 2002 not available for fishing (non-fly).

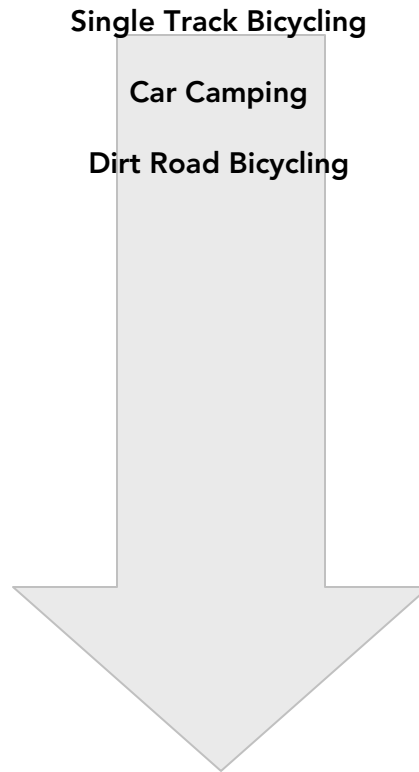
* Conclusions based on significant differences between Participant incidence in 2004 compared to 2002.

FEMALES: PARTICIPANT TRENDS – 2004 COMPARED TO 1998*

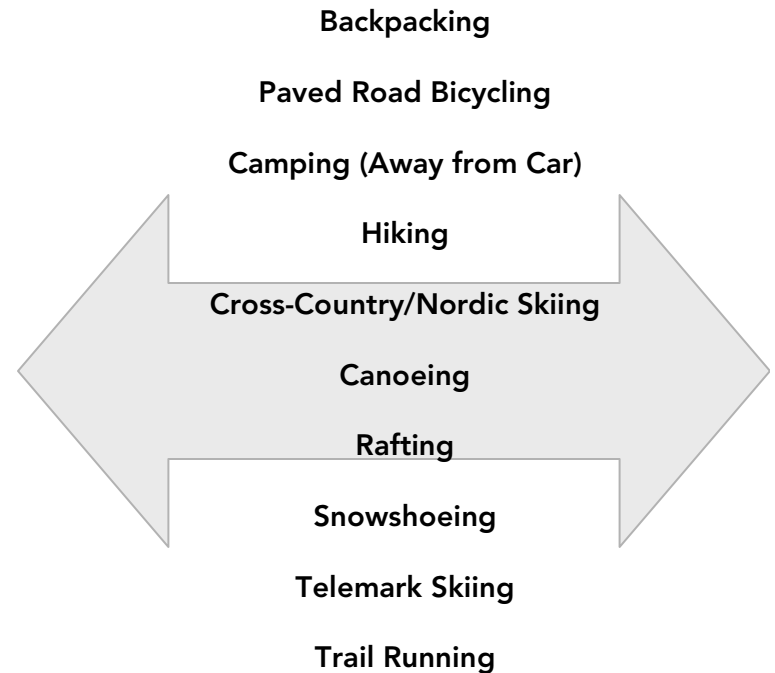
GREW*



DECLINED*



FLAT*



Note: Comparative data from 1998 not available for bird watching, natural rock climbing, artificial wall climbing, ice climbing, fly-fishing, fishing (non-fly), touring/sea kayaking, recreation/sit-on-top kayaking, whitewater kayaking.

* Conclusions based on significant differences between Participant incidence in 2004 compared to 1998.

FEMALES: ENTHUSIAST LEVELS

Activity	Incidence of Enthusiasts Among Female Americans 16 and Older in 2004	Enthusiast Population (Millions)	Enthusiast Frequency Level (2004)	Enthusiast Incidence % Change - 2004 vs.1998	Enthusiast Incidence % Change - 2004 vs.2002	Enthusiast Incidence % Change - 2004 vs.2003
Human Powered Activities - All Types	16.2%	18.6	NA*	NA	NA	NA
Backpacking	0.3%	0.345	6+	-50.0%	-25.0%	+50.0%
Bicycling - All Types	6.2%	7.1	NA*	NA	+14.8%	+9.7%
Bicycling - Paved Road	4.0%	4.6	52+	+42.9%	+5.3%	-25.9%
Bicycling - Single Track	1.7%	2.0	20+	+112.5%	No Change	+6.2%
Bicycling - Wide Dirt Road	2.0%	2.3	20+	+42.9%	+17.6%	+25.0%
Bicycling (Mountain Biking)	3.2%	3.7	NA*	+60.0%	+6.7%	+16.7%
Bird Watching	0.8%	0.919	12+	NA	-38.5%	No Change
Camping - All Types	3.9%	4.5	NA*	NA	+56.0%	+11.4%
Car Camping	3.8%	4.4	6+	+72.7%	+81.0%	+26.7%
Camping (Away from Car)	0.2%	0.230	8+	NA	-33.3%	-50.0%
Climbing with Rope/Harness - All Types	0.3%	0.345	NA*	NA	+50.0%	+50.0%
Climbing - Natural Rock	0.1%	0.115	10+	-50.0%	No Change	No Change
Climbing - Artificial Wall	0.3%	0.345	6+	NA	+200.0%	+200.0%
Climbing - Ice	0.05%	0.058	3+	NA	No Change	No Change
Cross-Country/Nordic Skiing	0.5%	0.575	8+	-28.6%	-16.7%	-28.6%
Fishing - All Types	3.2%	3.7	NA*	NA	NA	NA
Fishing (Non-Fly)	2.9%	3.3	25+	NA	NA	NA
Fly Fishing	0.6%	0.689	15+	NA	+20.0%	+500.0%
Hiking	3.8%	4.4	15+	+2.7%	No Change	-11.6%
Paddlesports - All Types	1.8%	2.1	NA*	NA	+28.6%	-11.1%
Canoeing	0.9%	1.0	7+	No change	-22.2%	+12.5%
Rafting	0.5%	0.575	3+	+150.0%	+25.0%	No Change
Kayaking - All Types	0.7%	0.804	NA*	+250.0%	No Change	+75.0%
Kayaking - Recreation/Sit-on-Top	0.3%	0.345	7+	NA	No Change	No Change
Kayaking - Touring/Sea	0.5%	0.575	5+	NA	+66.7%	+25.0%
Kayaking - Whitewater	0.1%	0.115	3+	NA	-50.0%	No Change
Kayaking (Non-Whitewater)	0.7%	0.804	4+	NA	+16.7%	+75.0%
Snowshoeing	0.1%	0.115	7+	+100.0%	No Change	-66.7%
Telemark Skiing	0.1%	0.115	5+	-50.0%	No Change	-50.0%
Trail Running	1.8%	2.1	49+	+20.0%	+38.5%	+28.6%

FEMALES: DEMOGRAPHIC PROFILE TRENDS OF ENTHUSIASTS

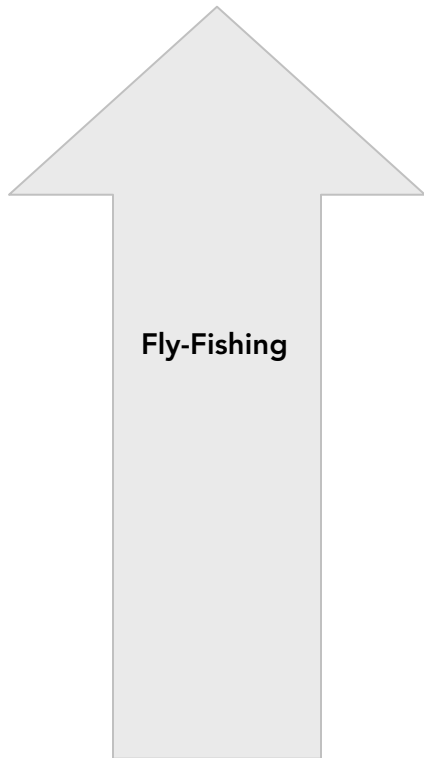
- During 2004, more than one-quarter (29%) of overall female Enthusiasts are sourced from the youth segment—the highest representation of that age group in seven years.
- The majority of year 2004 female Enthusiast report the presence of children in their households—a higher incidence than in 2002.

<u>Dimension</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>	<u>2004</u>
Gender							
Male	0%	0%	0%	0%	0%	0%	0%
Female	100%	100%	100%	100%	100%	100%	100%
Age							
16 to 24	22%	23%	20%	21%	23%	23%	29%
25 to 34	27%	25%	29%	27%	20%	25%	23%
35 to 44	19%	21%	22%	24%	20%	20%	18%
45+	32%	31%	29%	28%	37%	32%	30%
Marital Status							
Married	51%	52%	49%	52%	53%	53%	50%
Unmarried	49%	48%	51%	48%	47%	47%	50%
Ethnicity							
Caucasian	88%	86%	85%	85%	84%	85%	83%
African-American	4%	3%	4%	6%	7%	5%	5%
Hispanic	2%	3%	3%	5%	5%	5%	3%
Asian	1%	*	1%	2%	2%	1%	1%
Other	5%	8%	7%	2%	2%	4%	8%
Children <18							
Yes	49%	50%	52%	53%	47%	51%	52%
Household Income							
<\$40k	46%	44%	41%	44%	41%	40%	42%
\$40k - \$79k	32%	30%	33%	37%	39%	41%	36%
\$80k+	22%	26%	26%	19%	20%	19%	22%
Region							
Northeast	18%	21%	20%	18%	16%	21%	19%
South Central	28%	25%	22%	29%	31%	30%	30%
North Central	25%	28%	26%	30%	29%	27%	31%
West	29%	26%	32%	19%	24%	22%	20%

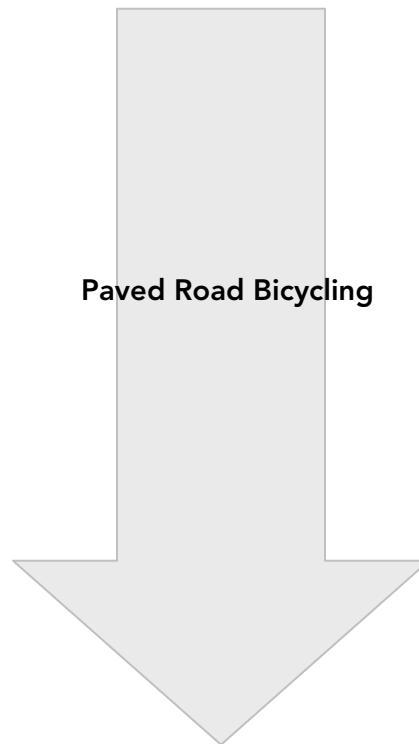
☐ = Significant difference from 2002

FEMALES: ENTHUSIAST TRENDS – 2004 COMPARED TO 2003*

GREW*



DECLINED*



FLAT*

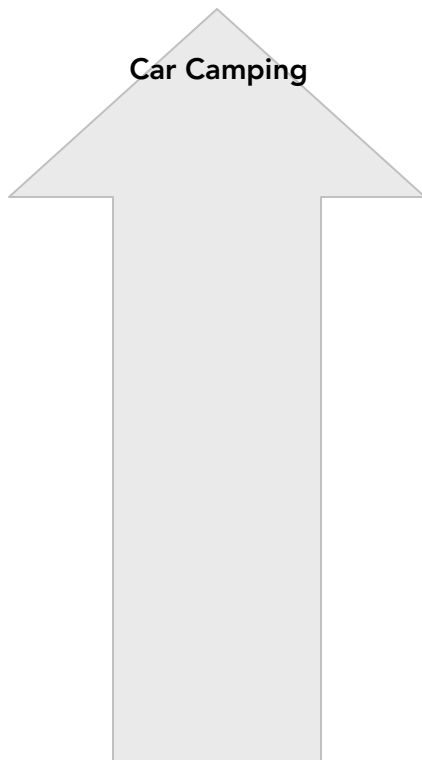


Note: Comparative data from 2003 not available for fishing (non-fly).

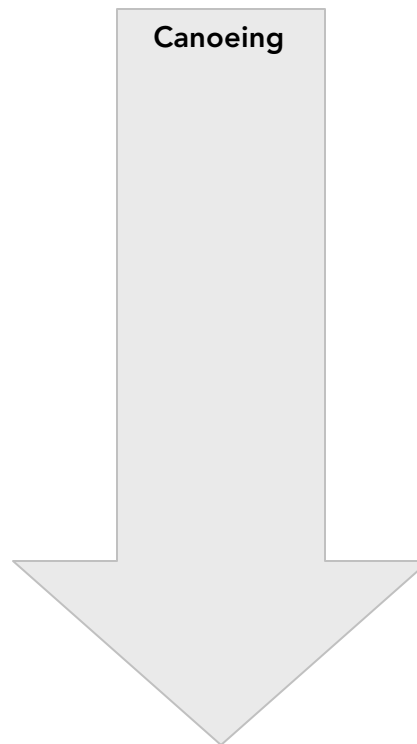
* Conclusions based on significant differences between Enthusiast incidence in 2004 and 2003

FEMALES: ENTHUSIAST TRENDS – 2004 COMPARED TO 2002*

GREW*



DECLINED*



FLAT*

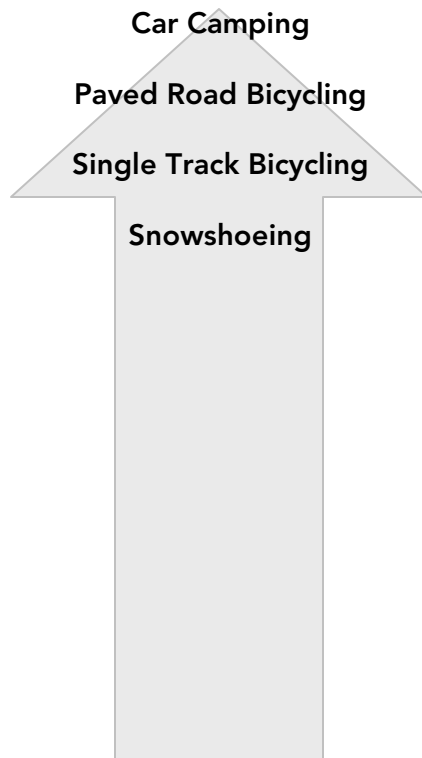


Note: Comparative data from 2002 not available for fishing (non-fly).

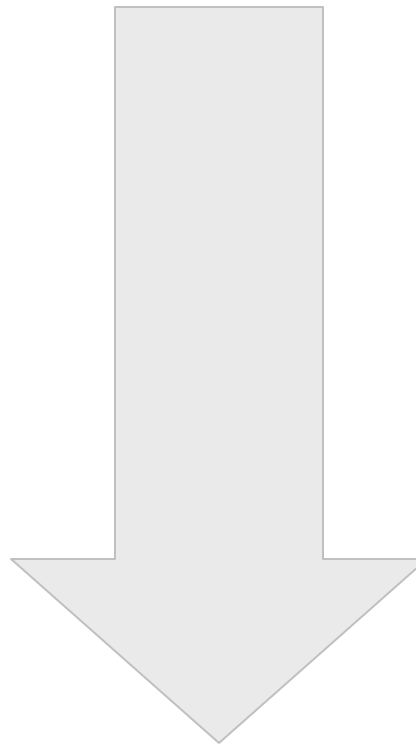
* Conclusions based on significant differences between Enthusiast incidence in 2004 compared to 2002.

FEMALES: ENTHUSIAST TRENDS – 2004 COMPARED TO 1998*

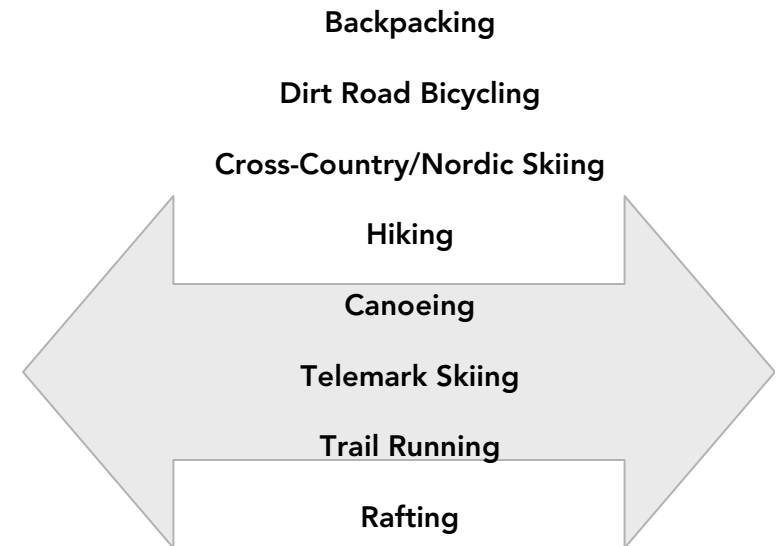
GREW*



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FLAT*

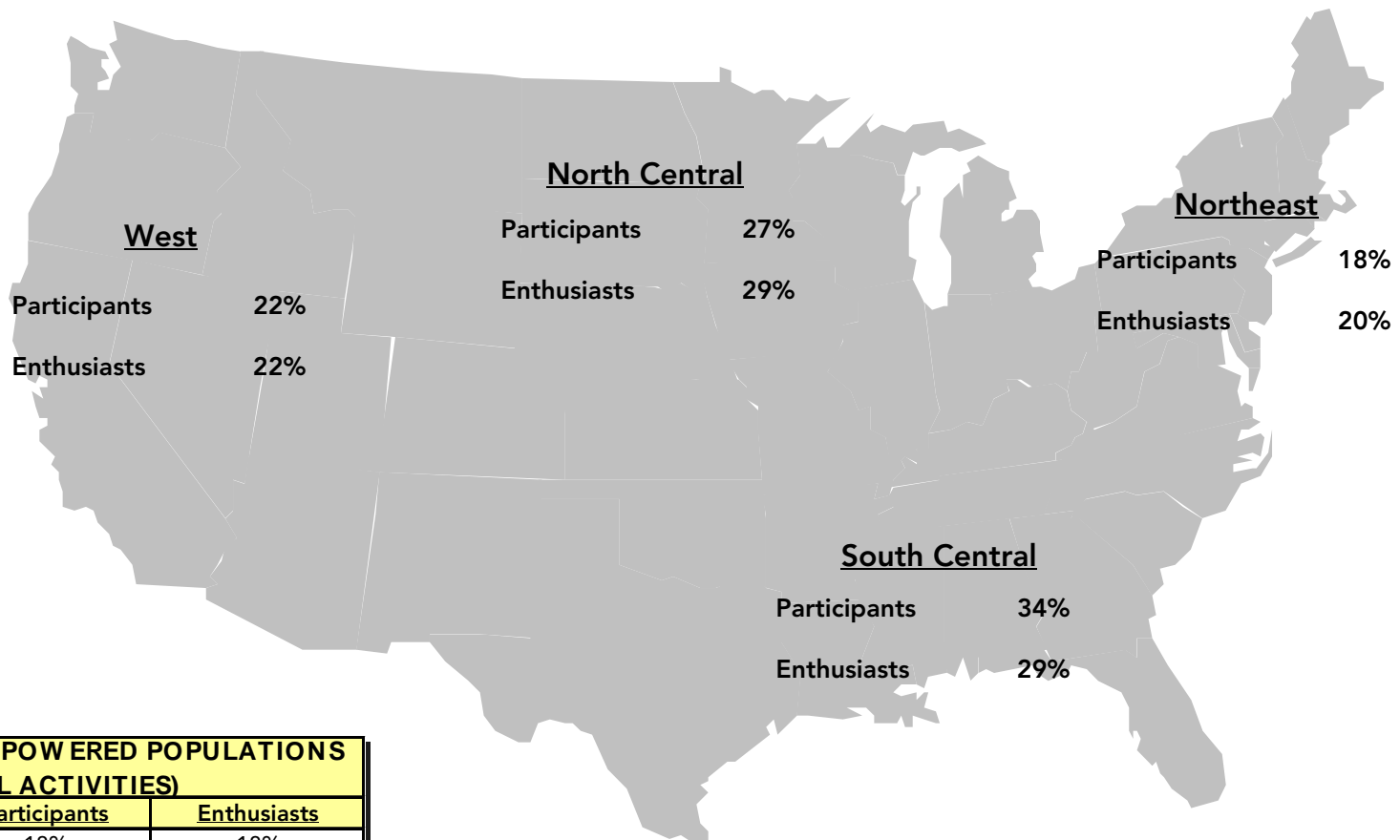


Note: Comparative data from 1998 not available for bird watching, camping (away from car), natural rock climbing, artificial wall climbing, ice climbing, fly-fishing, fishing (non-fly) touring/sea kayaking, recreation/sit-on-top kayaking, whitewater kayaking.

* Conclusions based on significant differences between Enthusiast incidence in 2004 compared to 1998.

FEMALES - ALL ACTIVITIES: WHERE THEY LIVE IN YEAR 2004

In 2004, female Participants and Enthusiasts are most likely to live in the South, followed by the North Central region.



TOTAL HUMAN POWERED POPULATIONS (ALL ACTIVITIES)		
Region	Participants	Enthusiasts
Northeast	18%	18%
South Central	34%	33%
North Central	23%	23%
West	25%	26%

OUTDOOR RECREATION PARTICIPATION STUDY
METHODOLOGY

METHODOLOGY

METHODOLOGY OF THE PARTICIPATION STUDY

Outdoor Industry Foundation (OIF) presents the **Outdoor Recreation Participation Study**[™]. This is the 7th edition of this annual report, produced for OIF by The Leisure Trends Group, tracking nationwide participation levels for Americans 16 and older in 22 outdoor activities.

A Trend Report

This **Participation Study** is a *trend* report. It is designed to give insight into Americans' perceptions of themselves as outdoor recreationists. The results are not expected to directly correlate with the sale of outdoor recreation products. This is not a consumer expenditure study, but does provide insight into potential consumer markets. Snowshoeing is a good example of trend identification. The survey question for Snowshoeing is undefined. The question was simply asked, "Have you gone Snowshoeing?" The question is open to the respondent's interpretation. Regardless of interpretation, the participation trend reported for seven years has been consistent and validates the accurate *trend* reported here. Consistent and stable numbers show a trend for increased participation, awareness, and interest in Snowshoeing.

Methodology Summary

A more detailed methodology section can be found at the close of the full report. In summary, data for this study were collected as part of the LeisureTRAK®, an on-going study of Americans' leisure time behavior and attitudes. For comparative purposes, the quarterly data collected for this report have been aggregated on an annual basis for each of the years shown, 1998 through 2004. During 2004, 4,000 telephone interviews were conducted using scientific sampling and random digit dial methodology. The overall 2004 results are projectable to the American population, age 16 and over, with a margin of error of +/- 1.6% at the 95% confidence level.

For some activities, low participation levels yield a Participant and/or Enthusiast sample that is too small for in-depth demographic/cross-participation/total number of outings profiling. In the detailed section of these activities you will note the absence of demographic/cross-participation total number of outings information.

METHODOLOGY OF THE PARTICIPATION STUDY (continued)

Telemark Skiing & Cross-Country/Nordic Skiing

Year 2003

The 2003 Participant Study included a revised definition for Telemark skiing – an activity that had been tracked since 1998 without any additional information provided to respondents (“Have you gone Telemark skiing?”). In 2003, the definition of the activity was revised to include the following descriptor – “downhill with Telemark bindings that allow for a free-heel skiing experience.”

This more detailed description of Telemark skiing may have played a role in the participation levels reported in year 2003—as surveyed Americans were able to more accurately attribute their participation during the year to Telemark skiing based on the expanded definition provided.

The revised Telemark skiing definition may have also impacted the participation levels reported for cross-country/Nordic skiing in year 2003. Free-heel skiers who may have attributed their activity to cross-country/Nordic skiing in previous studies, appear to now be attributing their participation to Telemark skiing – based on the more detailed description of the activity. Therefore, conclusions regarding the participation in these two activities *must* be made with this dynamic in mind. It is believed that the 2003 results for both activities reflect the most accurate measurement of the Americans’ involvement with the respective activities.

Year 2001

Beginning with the 2001 Participation Study, the activity of cross-country skiing was revised to include Nordic skiing in the wording of the question. The question used for the first three years of the report was “Have you gone cross-country skiing?” The question was revised to “Have you gone cross-country or Nordic skiing?”

This change in definition appears to have caused a shift in the way that Americans attributed their participation in the activity in 2001 and 2002. Cross-country/Nordic skiing participation (as measured in this report) experienced an increase in participation while Telemark skiing saw declines.

The shifts in participation levels in both activities during those years may be due to the change in definition. Nordic skiers who may have attributed their activity activity to Telemark skiing in previous studies, appeared to attribute their participation to cross-country/Nordic skiing based on the revised definition. Therefore, conclusions based on growth or declines in participation in/from 2001 and 2002 *must* be made with this dynamic in mind.

METHODOLOGY OF THE PARTICIPATION STUDY (continued)

Camping, Backpacking and Car Camping Explained

At first glance, the activities described as Camping, Backpacking, and Car Camping sound similar. However, the survey results show that Americans interpret these as separate activities. The populations of these three activities have less than 50% overlap. This means that there is a distinction in Americans' minds about camping, backpacking, and car camping. Camping away from your car, but not backpacking, can be done for a variety of reasons such as fishing, hunting, surfing, island camping, attending festivals or concerts, star gazing, etc. People may travel by boat or canoe to a campsite using dry bags for gear as opposed to backpacks. People spend the night out-of-doors for a wide variety of reasons. OIF will continue to add and/or revise questions as needed to gain more insight into these three activities.

METHODOLOGY OF THE PARTICIPATION STUDY (continued)

Data for this study were collected as part of the LeisureTRAK®, an on-going study of Americans' leisure time behavior and attitudes. For comparative purposes, the quarterly data collected for this report have been aggregated on an annual basis for each of the years shown – 1998/1999/2000/2001/2002/2003/2004.

Specifics of the data collection efforts are as follows:

Year	Number of Interviews	Data Collection Time Period
1998	2,255	January/June/October
1999	3,026	February/June/September/November
2000	2,502	March/June/November
2001	4,000	March/June/September/December
2002	4,000	March/June/September/December
2003	4,000	March/June/September/December
2004	4,000	March/June/September/December

Each quarter, telephone interviews are conducted using scientific sampling and random digit dial methodology. A disproportionate stratified random sample by census region is used for the study. Calls are made at random until a representative quota for each region is reached, and a total of 1,000 interviews are conducted. Only Americans age 16 and older are interviewed. Interviewing for the LeisureTRAK® is spread over 14 consecutive days in each quarter.

The overall 2004 Participant/Enthusiasts results are projected to the American population, age 16 and over, with a margin of error of +/- 1.6% at the 95% level of confidence. This is a constant because all of the Participant and Enthusiast levels are calculated using the information provided by all 4,000 respondents.

The detailed activity results (demographic profiles, cross-over participation, etc.) are subject to higher margins of errors because the results are calculated using the number of Participants and Enthusiast for each activity identified within the sample. As a general rule, consider that the higher the Participant and Enthusiast incidence (for example, paved road bicycling, hiking, car camping), the lower the margin of error for the demographic profiles and crossover participation levels.

METHODOLOGY OF THE PARTICIPATION STUDY (continued)

The data collected for this study have been used to make projections to the U.S. population so that the size of activity populations can be determined. The following U.S. Census information is used to estimate the population sizes for each activity.

Populations	1998/99	2000	2001	2002	2003	2004
Total - Americans 16 and Older	210,605,000	213,454,000	215,123,000	217,443,000	219,748,000	222,080,000
Young Americans - 16 to 24	37,200,000	38,600,000	39,077,000	39,901,000	40,137,000	40,650,000
Female Americans - 16 and Older	107,714,000	110,514,000	111,400,000	112,569,000	113,734,000	114,914,000

It is important to note that the 2004 Census estimate reflects a 1.2% increase in the total U.S. population 16 and over compared to 2003. This increase has an impact on the projected populations of OIF tracked activities. When comparing the estimated activity populations across different years, consideration must be given to the fact that the 2004 projection is based on a total U.S. population that is larger by millions of people than in previous years. The percentage of respondents who indicate participating in an activity may have declined slightly from the previous year, but may project to a larger activity population—simply because of the increase in U.S. population 16 and older during that time. **For that reason, the determination of growth or decline in each activity has been focused on the incidence of people participating in activities, rather than changes in the projected population sizes.**

Low participation levels in some activities yield a Participant/Enthusiast sample that is too small for in-depth demographic profiling, including:

No detailed **Participant** information available for:

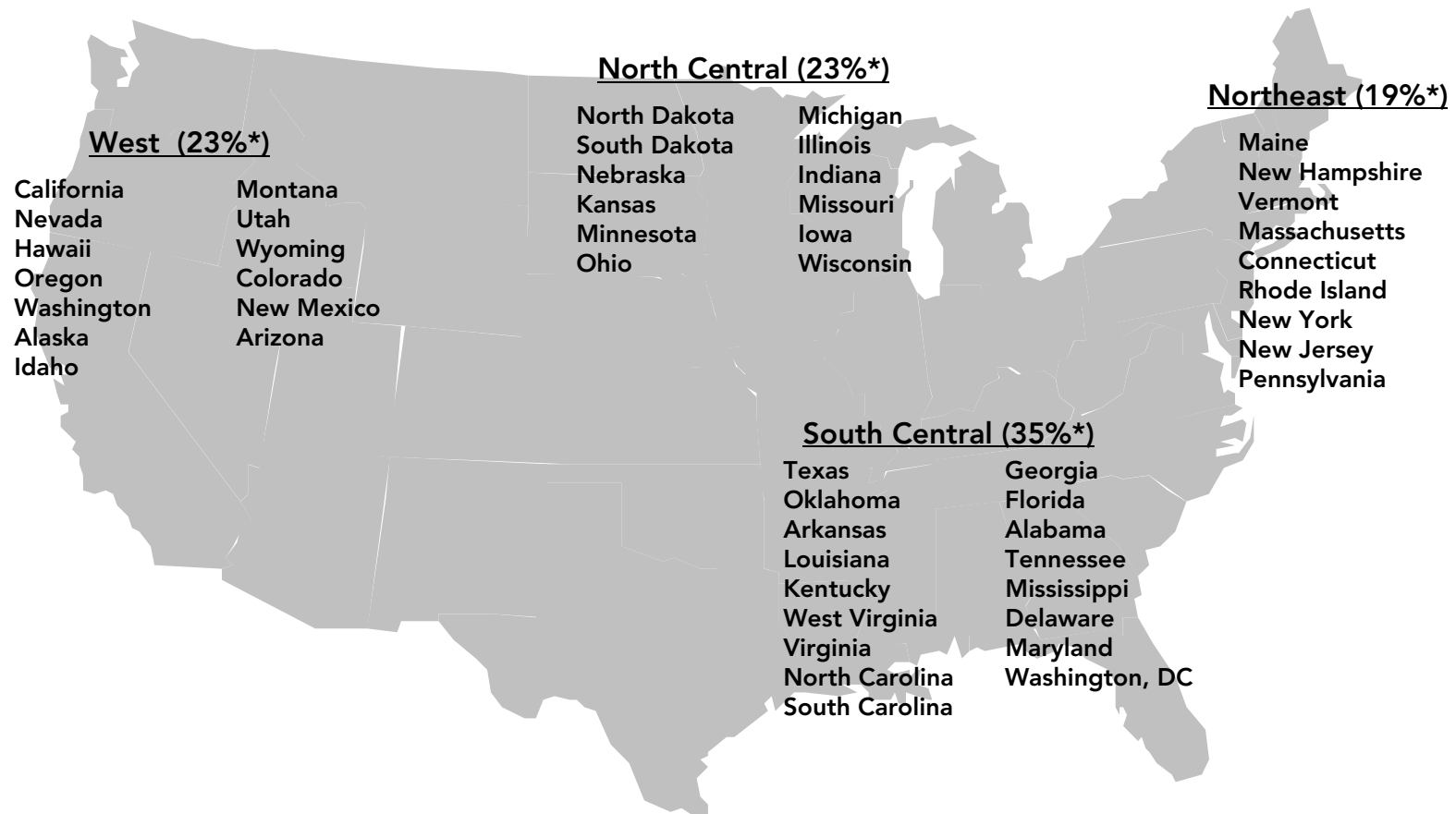
Ice Climbing

No detailed **Enthusiast** information available for:

Ice Climbing
 Artificial Wall Climbing
 Natural Rock Climbing
 Cross-Country/Nordic Skiing
 Touring/Sea Kayaking
 Recreation/Sit-on-Top Kayaking
 Whitewater Kayaking
 Snowshoeing
 Telemark Skiing

METHODOLOGY OF THE PARTICIPATION STUDY (continued)

Census-based information has been used to classify Participants and Enthusiasts by the region in which they live. Detailed below are the four Census-based regions, the percent of Americans 16 and older in the U.S. that live in each of the regions, and the states that comprise each region.



* Percentage of **total** Americans 16 and older living in each region



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