

OUTDOOR RECREATION PARTICIPATION STUDY

EIGHTH EDITION, FOR YEAR 2005

EXECUTIVE SUMMARY



TREND ANALYSIS FOR THE UNITED STATES PUBLISHED JUNE 2006



EXECUTIVE SUMMARY: KEY FINDINGS

Participation in Active Outdoor Recreation Remains Stable with almost Three-Quarters of Americans (Age 16 and Older) Participating in 2005

- ❖ 161.6 Million (72.1%) Americans age 16 and older participated in an outdoor activity in 2005.*
- ❖ The majority of Americans 16 and older participated in between one and three outdoor activities (62.6%) in 2005.
- ❖ The top five outdoor activities by percent of Americans who participated in the activity at least once in the prior year:

| Activity | Participation (2005) |
|---------------|----------------------|
| Bicycling | 38.2% |
| Fishing | 34.5% |
| Hiking | 34.2% |
| Camping | 30.4% |
| Trail Running | 18.0% |

*Based on participation in 22 selected outdoor activities.

EXECUTIVE SUMMARY: KEY FINDINGS

Total Outings Declined 11% in 2005

- ❖ In 2005, Americans 16 and older took a total of 7.3 billion outings compared to 8.3 billion outings in 2004. Bicycling and fishing accounted for the bulk of the decline.
 - ❖ Bicycling declined from 3.9 billion outings in 2004 to 3.1 billion outings in 2005.
 - ❖ Fishing declined from 1.4 billion outings in 2004 to 1.1 billion outings in 2005.
- ❖ Median number of outings per participant declined from 51 in 2004 to 45 in 2005.
- ❖ The top five outdoor activities by outings:

| Activity | Total Outings (2005) |
|---------------|----------------------|
| Bicycling | 3,123 |
| Trail Running | 1,333 |
| Fishing | 1,082 |
| Hiking | 844 |
| Camping | 347 |

- ✓ *Note: Participation in outdoor activities remains strong and the market is healthy and robust. However, with a decline in total outings, the industry will need to focus on the reasons why outings are declining. That is, who and what are capturing share from the outdoors.*

EXECUTIVE SUMMARY: KEY FINDINGS

Growth in Individual Activities is Focused on Activities that can be "Done in a Day" There is a Decline in Commitment-Heavy Activities

- ❖ Overnight backpacking (22.5% decline) is the one activity that declined dramatically in participation over an eight year period.
- ❖ Snowshoeing and trail running increased significantly over the eight year period (83% and 22% growth respectively).

✓ *Note: Activities which meet the following characteristics will have broader appeal.*

- ✓ *Easy access*
- ✓ *Easy to learn*
- ✓ *Done in a day*
- ✓ *Less specialized technical gear required*

✓ *Note: Growth in active outdoor recreation comes from two sources: increases in participation (new participants and cross-over participants) and increases in total outings. To increase participation, "new" twists on "old" activities are needed that make the activity more appealing and meet the above characteristics.*

EXECUTIVE SUMMARY: KEY FINDINGS

A One-Time Trial does NOT Equal Conversion

- ❖ 18% of Americans 16 and older only took one to three total outings in 2005.
 - ❖ Fly-fishing peaked in 2004 but then declined 19.9% from 2004 to 2005.
 - ❖ Telemark Skiing peaked in 2000, then declined in 2001 and stabilized after that time period.
 - ❖ Except for bicycling, bird watching and trail running, the majority of individuals participate only one or two times each year in each activity.
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- ✓ *Note: The old adage that it is easier to keep current customers than it is to gain new customers. This holds true in participation. Finding triggers that encourage repeat participation in each activity will be important to growing the market. Repeat participants are more likely to purchase products and encourage friends and family to participate.*

 - ✓ *Note: Some essential questions to consider:*
 - ✓ *How easy is it to become an “expert” in the activity?*
 - ✓ *What is being done to help the learning curve in a certain activity?*
 - ✓ *How easy is it to get to the destination?*
 - ✓ *How much time must be spent on the activity?*
 - ✓ *What can be done to encourage repeat participation?*
 - ✓ *What can be done to promote the activity?*
 - ✓ *How can we lower the equipment cost to engage in activities?*

 - ✓ *Note: It is necessary to have continual contact with individuals who participate in “trials” to encourage repeat participation.*

EXECUTIVE SUMMARY: KEY FINDINGS

Participation in Outdoor/Adventure Vacations Remains Stable with Water-Sport Vacations Increasing

- ❖ In 2005, one in four Americans 16 and older (or 59.5 million Americans) took a vacation specifically to participate in an outdoor activity.
 - ❖ Swimming (20%), hiking/backpacking (18%), fishing (14%) and camping vacations (14%) are the leading vacation activities.
 - ❖ More Americans are participating in water-sports vacations such as swimming in 2005 (20%) than in 2003 (15%). Participation in camping vacations is also greater in 2005 (14%) than it was in 2003 (11%).
 - ❖ One-third of active travelers are over the age of 45.
- ✓ *Note: There is huge growth potential in outdoor travel. Over 160 million Americans participate in outdoor activities but only 59.5 million took a vacation specifically to participate in an outdoor activity.*
- ✓ *Note: As the baby boomers age they will seek more active vacations. This group of individuals are eager to see new places and do new things.**

*Source: Leisure Trends Group, LeisureTRAK® (2004)

EXECUTIVE SUMMARY: KEY FINDINGS

The 2005 Participant

- ❖ During 2005, the majority (82.3%) of Participants participated in between one and five separate outdoor activities.
 - ❖ Participants ages 16 and older participated in slightly more than three different activities on average in 2005 (Average number of activities participated in 1998 was 2.8).
 - ❖ During 2005, Participants took on average 45 different outings – less than the average number of outings taken in either 2004 or 2003.
 - ❖ The large decline in bicycling and fishing outings accounts for this large decline in total outings.
- ✓ *Note: Weather can dramatically influence participation and frequency. In 2005, there were a number of notable weather events in the U.S. – hurricanes in the South Central region, bitter cold winter in the Northeast, late snow in the Midwest, no snow in the Pacific Northwest, and good snow in the southern Rockies.*

EXECUTIVE SUMMARY: KEY FINDINGS

Hispanic* and Black/African American Participants tend to be Young Adult Males

- ❖ Hispanic Participants: Male (66%), 16 to 24 year olds (42%).
- ❖ Black/African American Participants: Male (60%), 16 to 24 year olds (40%).
- ❖ Caucasian/White Participants: Male (54%) 16 to 24 year olds (20%).
- ❖ Participation rates differ in the top five outdoor activities:

| Activity | Hispanic | Black/ African American | White/ Caucasian |
|---------------------|----------|-------------------------|------------------|
| Total Participation | 72.2% | 59.8% | 72.9% |
| Bicycling | 40.5% | 32.2% | 37.7% |
| Fishing | 30.9% | 23.1% | 36.2% |
| Hiking | 29.1% | 12.9% | 37.3% |
| Camping | 28.7% | 16.1% | 32.2% |

✓ *Note: The Hispanic and Black/African American outdoor Participant is young and male. These participants represent a new diverse generation of outdoor enthusiasts. Media, messaging and encouraging participation of cross-over activities is essential for keeping these individuals engaged.*

*The participation survey was only conducted in English and only captures English speakers. Therefore, a large segment of the Hispanic population was not captured. The data only reflects the English speaking population. The Pew Hispanic Center estimates that 60% of U.S. Hispanics are either primarily English speakers (14%) or bilingual (46%). The age distribution of this group of Hispanics differs from primarily Spanish speaking Hispanics. English speaking Hispanics tend to skew younger than the primarily Spanish speaking population. The Hispanic data is weighted to reflect this age distribution. This should be taken into consideration when reviewing data on Hispanics.

EXECUTIVE SUMMARY: KEY FINDINGS

74.5 Million Women Participate in Outdoor Activities, but is Fitness Stealing Share?

- ❖ Participation in outdoor activities among female Americans ages 16 and older remained stable from 2004 (63.7% or 73.2 Million American women) to 2005 (64.2% or 74.5 Million American women).
- ❖ However, female participants, on average, took significantly less outings in 2005 (28.4) than in 2004 (38.3). Females took 21.2 billion total outings in 2005 and participated in an average of 3 outdoor activities.
- ❖ Bicycling saw the most dramatic drop in the number of outings for American females.
 - ❖ Females averaged 18 paved road biking outings in 2005 compared to 28 in 2004.
 - ❖ Females averaged 10 mountain biking outings in 2005 compared to 17 in 2004.
- ❖ Fewer female participants in 2005 are between the ages of 16 and 24 than were in 2003. This could explain the decline in total outings since younger women tend to be more frequent participants than older women. In addition, a greater number of female participants are married (57%) in 2005 compared to 2004 (53%) and 2003 (52%).
- ❖ Female participation in specific activities has fluctuated over time:
 - ❖ Female participation in fly-fishing declined from 2004 to 2005.
 - ❖ Car-camping participation declined from 2003 to 2005.
 - ❖ Biking participation declined from 1998 to 2005.
 - ❖ Female participation in kayaking and snowshoeing increased substantially from 2004 to 2005.

✓ *Note: Other activities or time commitments such as fitness activities are stealing share from outdoor activities. Since 2001 the number of American women ages 16 and older who participate in fitness activities has grown 25% from 37% in 2001 to 47% in 2005* – the growth is centered around activities such as exercise, walking and yoga while outdoor activities such as bicycling and hiking have declined. The key is to show women that outdoor activities not only have a fitness component, but they provide an enhanced experience.*

*Source: Leisure Trends Group, LeisureTRAK® (2005)

EXECUTIVE SUMMARY: KEY FINDINGS

Participation among 16 to 24 Year Olds is High, but so is Interest in Other Activities

- ❖ 86.5% of Americans between the ages of 16 and 24 participated in outdoor activities in 2005.
- ❖ These young adults took 21.7 billion total outings in 2005 and participated in an average of 4.2 outdoor activities.
- ❖ Activities experiencing growth:
 - ❖ Cross-country skiing has increased from 2004 to 2005.
 - ❖ Trail running has grown from 2003 to 2005.
 - ❖ Snowshoeing and Telemark skiing saw greater participation in 2005 than in 1998.
- ❖ Young adults are participating less in Backpacking and in Bicycling (both mountain and paved road) in 2005 than in 1998.
- ❖ Total outings (all activities combined) have declined, but only directionally, not significantly, from 68 outings annually in 2004 to 60 outings in 2005.
 - ❖ Average number of natural rock climbing outings declined significantly in 2005 (3) from 2003 (8).

✓ *Note: Although not a significant difference, the directional decline in the average number of outings taken by 16 to 24 year olds is an item for concern. There are many other non-outdoor activities that compete for time. For example, on an average day in 2005, 14% of 16 to 24 year old males indicated that they played video/games and 31% indicated that it is one of their favorite activities.* If this group is ignored, other activities will take the place of being in the outdoors.*

*Source: Leisure Trends Group, LeisureTRAK® (2006)

ALL ACTIVITIES: PARTICIPANT LEVELS AND TRENDS

| Activity | American's 16 Years of Age or Older | | | | | |
|--|-------------------------------------|-----------------------------------|-------------------------------------|---|---|---|
| | Incidence of Participation in 2005 | Participant Population (Millions) | Total Number of Outings (Millions)* | Participation Incidence % Change - 2005 vs.1998 | Participation Incidence % Change - 2005 vs.2003 | Participation Incidence % Change - 2005 vs.2004 |
| Human Powered Activities - Any Type | 72.1% | 161.6 | 7329 | N/A | N/A | 0.7% |
| Backpacking | 6.0% | 13.5 | 81 | -22.5% | -3.5% | 0.1% |
| Bicycling - Any Type | 38.2% | 85.6 | 3123 | -5.7% | -3.9% | -1.1% |
| Bicycling - Paved Road | 35.0% | 78.5 | 2197 | -7.2% | -1.1% | -1.7% |
| Bicycling - Mountain Biking | 22.3% | 50.0 | 926 | -6.9% | -3.8% | -3.2% |
| Bicycling - Single Track Dirt | 17.4% | 39.0 | 507 | -1.4% | -3.0% | -2.3% |
| Bicycling - Wide Track Dirt | 17.0% | 38.1 | 419 | -9.9% | -5.0% | -5.8% |
| Bird Watching | 7.0% | 15.6 | 188 | N/A | -4.8% | 3.1% |
| Camping - Any Type | 30.4% | 68.1 | 347 | -3.6% | -3.0% | 2.8% |
| Car Camping | 23.1% | 51.7 | 259 | -6.3% | -4.1% | 4.9% |
| Camping (Away from Car) | 7.9% | 17.7 | 89 | N/A | 5.6% | 0.4% |
| Climbing with Rope/Harness - Any Type | 4.1% | 9.2 | 51 | N/A | 5.8% | 22.6% ** |
| Climbing - Natural Rock | 2.2% | 5.0 | 15 | -6.4% | 7.4% | 9.6% |
| Climbing - Artificial Wall | 3.0% | 6.7 | 34 | N/A | 3.1% | 30.6% ** |
| Climbing - Ice | 0.5% | 1.0 | 2 | N/A | 41.7% ** | -3.0% |
| Cross-Country/Nordic Skiing | 4.5% | 10.0 | 50 | 6.6% | 4.6% | 2.3% |
| Fishing - Any Type | 34.5% | 77.3 | 1082 | N/A | N/A | -4.7% |
| Fishing (Non-Fly) | 33.1% | 74.2 | 964 | N/A | N/A | -3.9% |
| Fly Fishing | 6.6% | 14.7 | 117 | N/A | 13.0% | -19.9% |
| Hiking | 34.2% | 76.7 | 844 | -0.1% | 5.0% | 1.1% |
| Paddlesports - Any Type | 15.3% | 34.3 | 191 | N/A | 3.9% | 7.2% |
| Canoeing | 9.3% | 20.8 | 83 | 8.5% | -8.7% | -7.5% |
| Rafting | 4.7% | 10.6 | 21 | 3.1% | 0.9% | 10.5% |
| Kayaking - Any Type | 5.6% | 12.6 | 86 | N/A | 23.0% | 23.3% |
| Kayaking (Non-Whitewater) | 5.3% | 11.9 | 82 | N/A | 26.3% | 25.3% |
| Kayaking - Recreation/Sit-on-Top | 4.0% | 9.0 | 54 | N/A | 34.4% | 22.4% ** |
| Kayaking - Touring/Sea | 2.5% | 5.6 | 28 | N/A | -4.7% | -1.6% |
| Kayaking - Whitewater | 1.0% | 2.2 | 4 | N/A | 16.1% | -2.8% |
| Snowshoeing | 2.4% | 5.5 | 22 | 83.4% | -9.8% | 14.1% |
| Telemark Skiing | 1.6% | 3.5 | 17 | 160.5% | -17.8% | -3.7% |
| Trail Running | 18.0% | 40.4 | 1333 | 22.1% | 4.8% | 1.0% |

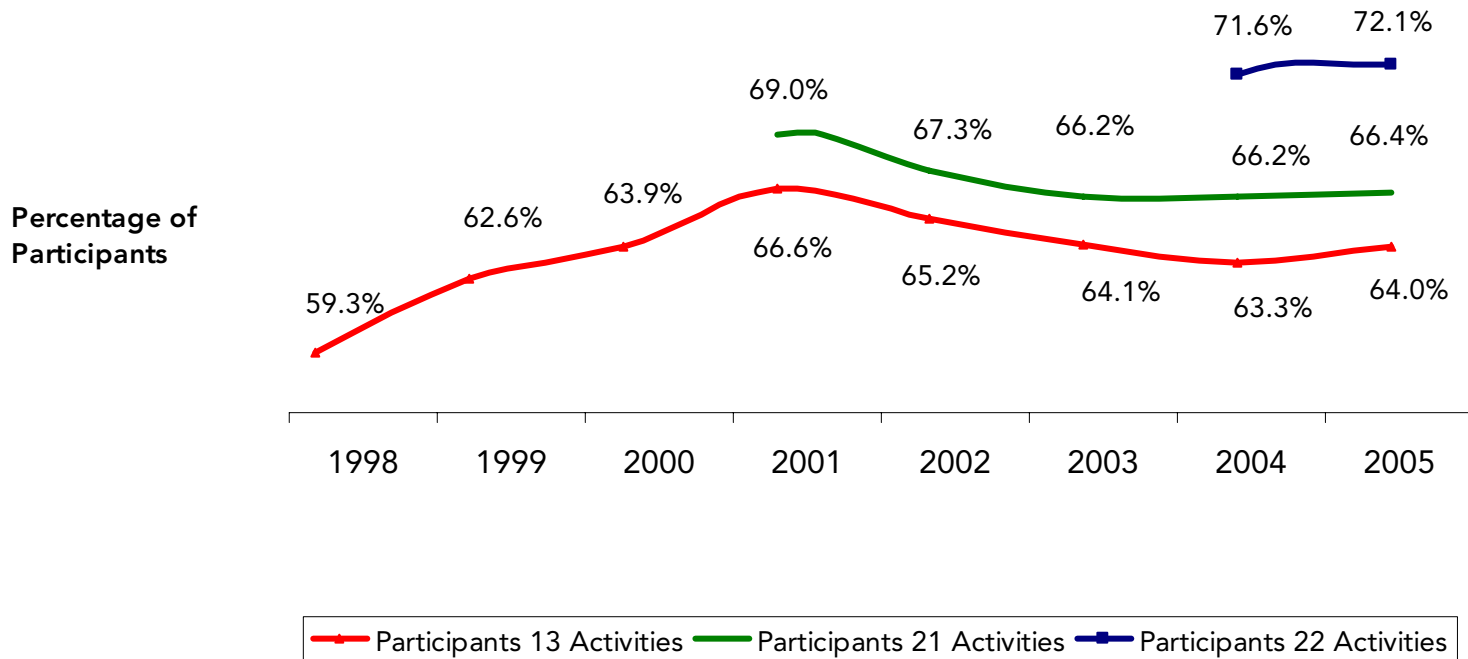
*Total Outings for roll up categories (total activities, bicycling, camping, climbing, fishing, paddle sports and kayaking) is calculated by summing total outings for the sub-categories.

** Represents a large percent growth or decline (greater than 20%) but is not significantly different from 2005 at the 95% confidence level

 Represents large percent growth or decline and is significantly different from 2005 at the 95% confidence level.

ALL ACTIVITIES: PARTICIPATION

The following chart highlights the number of total participants over the last eight years. From 1998 to 2000 only 13 outdoor activities were tracked. The decline in total outings can be attributed to a decline in bicycle outings. From 2001 to 2003, 21 outdoor activities were tracked, and in 2004 and 2005, 22 outdoor activities were tracked.



ALL ACTIVITIES: TOTAL OUTINGS

| Activity*** | Total Outings** (in millions) Among American's 16 Years of Age or Older | | | | | | | |
|--|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| | 1998 | 1999 | 2000 | 2001 | 2002 | 2003 | 2004 | 2005 |
| Human Powered Activities - Any Type | 6,178 | 5,663 | 6,532 | 9,067 | 8,570 | 6,970 | 8,271 | 7,329 |
| Backpacking | 98 | 98 | 69 | 126 | 85 | 55 | 67 | 81 |
| Bicycling - Any Type | 4,096 | 3,126 | 4,097 | 4,949 | 4,486 | 3,825 | 3,885 | 3,123 |
| Bicycling - Paved Road | 2,783 | 2,202 | 2,701 | 3,020 | 2,631 | 2,645 | 2,611 | 2,197 |
| Bicycling - Mountain Biking | 1,314 | 924 | 1,395 | 1,929 | 1,855 | 1,181 | 1,274 | 926 |
| Bicycling - Single Track Dirt | 520 | 408 | 674 | 967 | 945 | 591 | 633 | 507 |
| Bicycling - Wide Track Dirt | 794 | 515 | 721 | 962 | 910 | 589 | 641 | 419 |
| Bird Watching | N/A | N/A | N/A | 569 | 639 | 338 | 165 | 188 |
| Camping - Any Type | 311 | 277 | 357 | 388 | 447 | 400 | 349 | 347 |
| Car Camping | 311 | 277 | 256 | 247 | 341 | 317 | 245 | 259 |
| Camping (Away from Car) | N/A | N/A | 102 | 141 | 106 | 82 | 105 | 89 |
| Climbing with Rope/Harness - Any Type | N/A | N/A | N/A | 96 | 147 | 82 | 68 | 51 |
| Climbing - Natural Rock | 20 | 23 | 25 | 35 | 67 | 37 | 45 | 15 |
| Climbing - Artificial Wall | N/A | N/A | N/A | 59 | 74 | 45 | 20 | 34 |
| Climbing - Ice* | N/A | N/A | N/A | 2 | 5 | 1 | 2 | 2 |
| Cross-Country/Nordic Skiing | 53 | 38 | 30 | 62 | 82 | 38 | 58 | 50 |
| Fishing - Any Type | N/A | N/A | N/A | N/A | N/A | N/A | 1,388 | 1,082 |
| Fishing (Non-Fly) | N/A | N/A | N/A | N/A | N/A | N/A | 1,224 | 964 |
| Fly Fishing | N/A | N/A | N/A | 174 | 148 | 153 | 163 | 117 |
| Hiking | 722 | 871 | 870 | 910 | 877 | 788 | 827 | 844 |
| Paddlesports - Any Type | N/A | N/A | N/A | 316 | 324 | 193 | 235 | 191 |
| Canoeing | 126 | 88 | 72 | 192 | 155 | 112 | 134 | 83 |
| Rafting | 19 | 36 | 19 | 49 | 71 | 21 | 29 | 21 |
| Kayaking - Any Type | N/A | N/A | N/A | 74 | 98 | 61 | 73 | 86 |
| Kayaking (Non-Whitewater) | N/A | N/A | N/A | 66 | 79 | 55 | 66 | 82 |
| Kayaking - Recreation/Sit-on-Top | N/A | N/A | N/A | 29 | 32 | 26 | 44 | 54 |
| Kayaking - Touring/Sea | N/A | N/A | N/A | 38 | 47 | 29 | 23 | 28 |
| Kayaking - Whitewater* | N/A | N/A | N/A | 8 | 19 | 6 | 7 | 4 |
| Snowshoeing | 8 | 23 | 36 | 49 | 23 | 18 | 29 | 22 |
| Telemark Skiing | 8 | 23 | 19 | 24 | 22 | 21 | 11 | 17 |
| Trail Running | 715 | 1,061 | 939 | 1,406 | 1,290 | 1,059 | 1,189 | 1,333 |

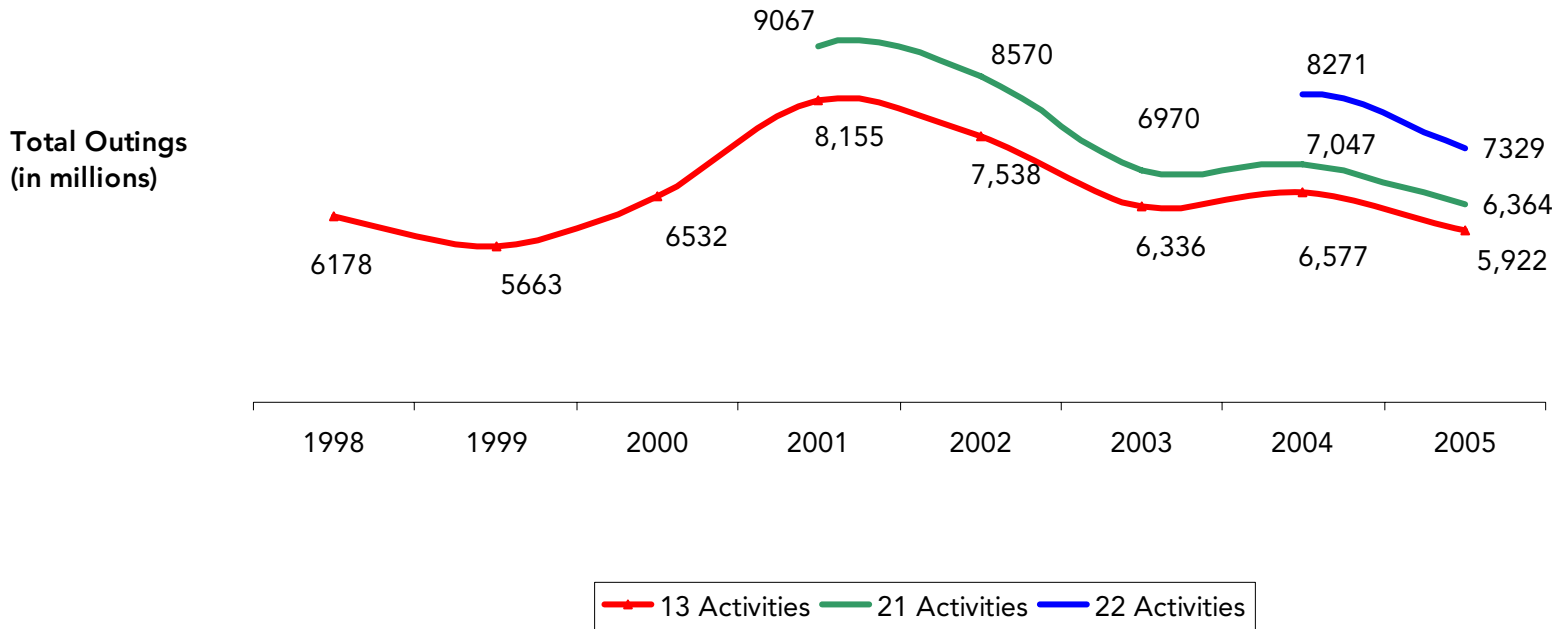
*Data not shown in individual section due to small sample size.

** Total Outings for roll up categories (total outdoor activities, bicycling, camping, climbing, fishing, paddle sports and kayaking) is calculated by summing the total number of outings for the sub-categories.

*** 1998 through 2000 includes total outings for 13 activities; 2001 through 2003 includes total outings for 21 activities; 2004 and 2005 includes total outings for 22 activities.

ALL ACTIVITIES: TOTAL OUTINGS* TRENDS

The following chart highlights the number of total outings over the last eight years. From 1998 to 2000 only 13 outdoor activities were tracked. From 2001 to 2003, 21 outdoor activities were tracked and in 2004 and 2005, 22 outdoor activities were tracked.



* Total Outings for roll up categories (total outdoor activities, bicycling, camping, climbing, fishing, paddle sports and kayaking) is calculated by summing the total number of outings for the sub-categories.

ALL ACTIVITIES: DEMOGRAPHIC PROFILE TRENDS

With the addition of the new activities over the past five years, the demographic make-up has shifted only slightly with participants more likely to be skewed male. Americans of all ages participated in outdoor activities in 2005. Close to one half are between the ages of 16 and 34 (47%) and close to half (48%) have children under the age of 18 in their household.

Demographic Profile

| Total Participants | 1998 (13 Activities) | 1999 (13 Activities) | 2000 (13 Activities) | 2001 (21 Activities) | 2002 (21 Activities) | 2003 (21 Activities) | 2004 (22 Activities) | 2005 (22 Activities) |
|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|-------------------------|
| Gender | | | | | | | | |
| Male | 50% | 51% | 52% | 54% | 53% | 56% | 56% | 56% |
| Female | 50% | 49% | 48% | 46% | 47% | 44% | 44% | 44% |
| Age | | | | | | | | |
| 16 to 24 | 22% | 21% | 26% | 27% | 28% | 28% | 26% | 26% |
| 25 to 34 | 20% | 21% | 21% | 22% | 21% | 20% | 21% | 21% |
| 35 to 44 | 24% | 25% | 22% | 20% | 19% | 20% | 19% | 21% |
| 45+ | 34% | 33% | 31% | 30% | 32% | 32% | 33% | 33% |
| Marital Status | | | | | | | | |
| Married | 52% | 54% | 50% | 46% | 50% | 50% | 52% | 53% |
| Unmarried | 48% | 46% | 50% | 54% | 50% | 50% | 48% | 47% |
| Ethnicity | | | | | | | | |
| Caucasian | N/A | N/A | N/A | N/A | N/A | 80% | 79% | 78% |
| African-American | N/A | N/A | N/A | N/A | N/A | 7% | 8% | 8% |
| Hispanic | N/A | N/A | N/A | N/A | N/A | 10% | 10% | 11% |
| Asian | N/A | N/A | N/A | N/A | N/A | 3% | 1% | 2% |
| Other | N/A | N/A | N/A | N/A | N/A | 4% | 6% | 6% |
| Children <18 | | | | | | | | |
| Yes | 46% | 47% | 48% | 43% | 45% | 50% | 49% | 48% |
| Household Income | | | | | | | | |
| <\$40k | N/A | 42% | 43% | 42% | 38% | 38% | 37% | 34% |
| \$40k - \$79k | N/A | 47% | 47% | 42% | 40% | 39% | 40% | 39% |
| \$80k+ | N/A | 10% | 10% | 16% | 22% | 23% | 23% | 27% |
| Region | | | | | | | | |
| Northeast | 19% | 16% | 13% | 20% | 18% | 18% | 18% | 18% |
| South Central | 34% | 34% | 33% | 32% | 33% | 33% | 34% | 34% |
| North Central | 25% | 22% | 25% | 21% | 25% | 24% | 23% | 22% |
| West | 23% | 28% | 28% | 27% | 23% | 25% | 25% | 26% |

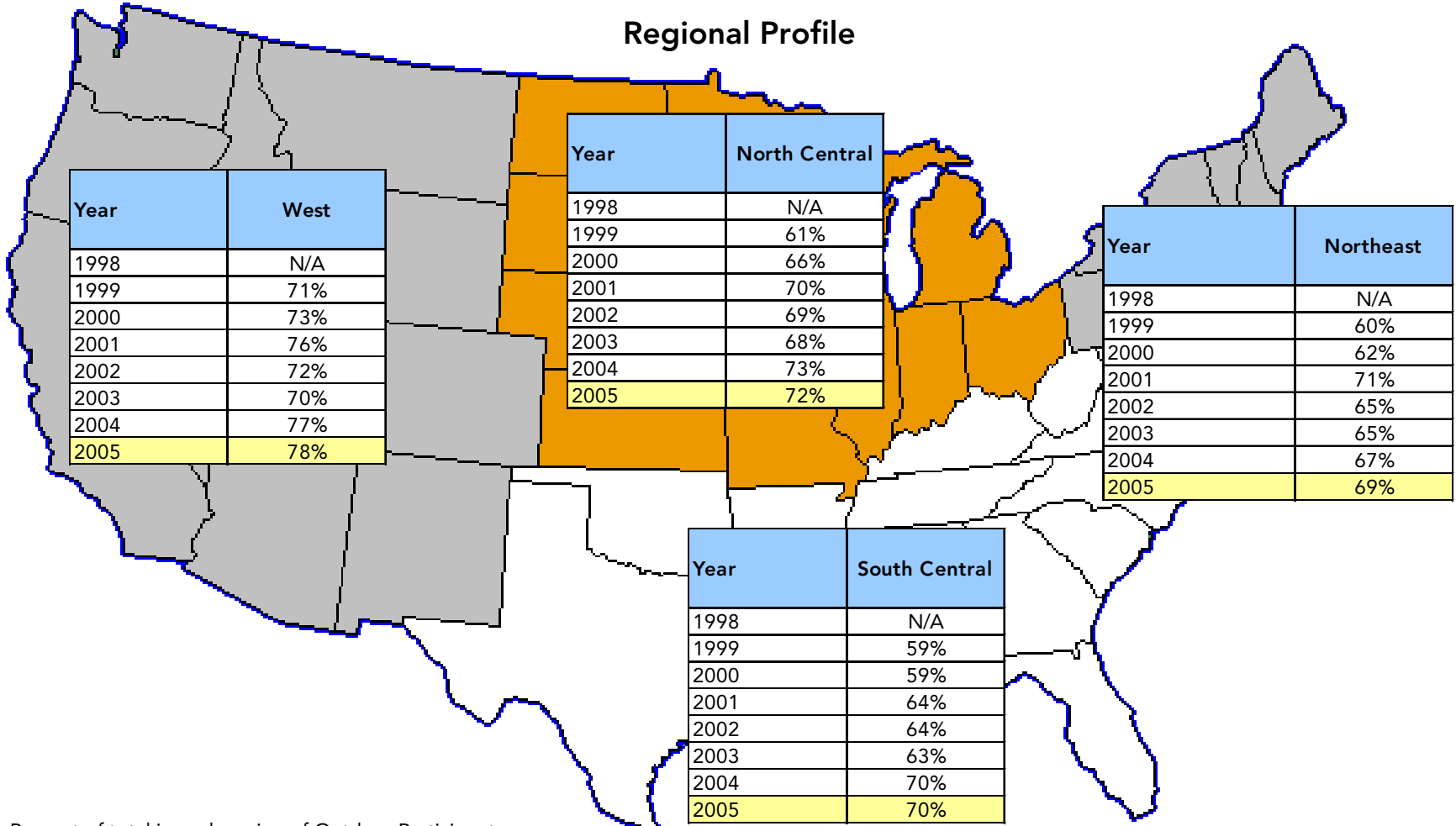
*Ethnicity: Will not add to 100%, see page 239 for details. = Significant difference from 2003.

Note: 2003 Does not include Fishing (Non-Fly)

ALL ACTIVITIES: WHERE PARTICIPANTS LIVE*

Over three-quarters (78%) of Americans living in the Western region participate in outdoor activities. Americans living in the Northeast region are the least likely to participate in outdoor activities.

Regional Profile



- Percent of total in each region of Outdoor Participants.
- 1999 to 2000 (13 activities); 2001 to 2003 (21 activities); 2004 to 2005 (22 activities).
- Not all 13 activities were asked for every fielding in 1998.

16 TO 24 YEAR OLDS, YOUNG ADULTS

THE 2005 YOUNG ADULT OUTDOOR RECREATION PARTICIPANT

- Primarily male and unmarried
- Almost half live in families with household incomes of less than \$40,000
- Largely Caucasian, but slightly more African-Americans and Hispanics since 2003
- Geographically dispersed; close to nine in 10 young adults living in the West and North Central regions participate in an outdoor activity

MAJOR TRENDS

The young adult category is more likely to participate in more activities than the whole:

- While 26.6% of all American participants engaged in only one activity, only 15.4% of young adults confined themselves to only one.
- 28.5% of young adults participated in more than 5 activities, compared to 17.6% of all American participants.

There has been an eight-year decline in young adult female participation – from 43% in 1998 to 36% in 2005.

Activity focus is shifting:

- Cross-country skiing has increased from 2004 to 2005.
- Trail running has grown from 2003 to 2005.
- Snowshoeing and Telemark skiing saw greater participation in 2005 than in 1998.
- Backpacking and Bicycling (both mountain and paved road) have declined in from 1998 to 2005.

Year 2005 Events of Note

Young adults total outings have declined from 68 outings annually in 2004 to 60 outings in 2005.

Observation/Implication

Need to figure out how to compete with myriad other demands and distractions vying for young adults' attention.

FEMALE OUTDOOR PARTICIPANTS

THE 2005 FEMALE OUTDOOR RECREATION PARTICIPANT

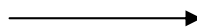
- One third are age 45 or older
- 57% are married
- Largely Caucasian
- Almost two-thirds live in households with incomes of \$40,000 or more
- Likely to live in the West – 70% of female Westerners are Participants compared to 64% of the population nationally

MAJOR TRENDS

- Overall female participation remained stable from 2004 (63.7% or 73.2 Million American women) to 2005 (64.2% or 74.5 Million American women).
- Female participants, on average, took significantly less outings in 2005 (28.4) than in 2004 (38.3).
- Females took 21.2 billion total outings in 2005 and participated in an average of 3 outdoor activities.
- Notable activity declines:
 - With a 13.3% decline since 1998, bicycling saw the most dramatic drop in the number of outings for American females
 - Female participation in fly-fishing declined from 2004 to 2005.
 - Car-camping participation declined from 2003 to 2005.
- Activity bright spots: Female participation in kayaking and snowshoeing increased substantially from 2004 to 2005.

Year 2005 Events of Note

Fewer female participants in 2005 are between the ages of 16 and 24 than were in 2003 – could explain the decline in total outings since young adults tend to participate more frequently.



Observation/Implication

With increased demands on their time, females may be focusing more on more accessible fitness options – yoga, aerobics, gym. Need to court them to the outdoors through gateway activities.

BACKPACKING: 13.5 MILLION PARTICIPANTS, 81 MILLION OUTINGS

THE 2005 AMERICAN BACKPACKER

- Primarily male and unmarried
- Mean age of 31 years
- About one-third come from non-white or mixed ethnic groups
- One in ten Westerners are backpackers compared to 6% of the total population
- Crossover activities include hiking, camping, bicycling and fishing
- Hit the trails, on average, six times during 2005
- More than one-third limit their activity to only a single backpacking outing during the year

MAJOR TRENDS IN BACKPACKING

Although the late 1990's and early 2000's represent the time period when participation in backpacking was at its strongest, participation has held constant over the past three years and the average number of Participant outings in 2005 increased by 14 million over the previous year.

- Age: Trend results show that the steady growth in 16 to 24 year-old backpackers since 1998 reached a peak in 2004 where one-half of backpackers fall within this age group. In 2005, a greater percentage of backpackers were 25 to 44 years old than were 16 to 24 years old; a flip flop from previous years. However, attrition continues in the 45 and older set who now comprise only 14% of the backpacking population in 2005—down from a high of 23% in 2002.
- Crossover Activities: The 2005 backpacker participates more frequently in car camping than backpackers did in 2003.

Year 2005 Events of Note

American backpackers are more likely to be 25 to 44 years old than 16 to 24 years old. The increase in age correlates with greater affluence among the backpacker population.

Observation/Implication

The American backpacker is growing-up and has more money to spend on gear, travel, etc.

Study Question: "Have you gone on an overnight backpacking trip of more than one-quarter mile from where you parked your vehicle?"

BICYCLING: 85.8 MILLION PARTICIPANTS, 3.1 BILLION OUTINGS

THE 2005 AMERICAN BICYCLIST

- Relatively gender balanced with a slight favor toward males
- Participation among all age groups (mean age of 36)
- Geographically dispersed with a slightly higher proportion living in the West
- Crossover activities include camping, fishing and hiking
- Went on 36 outings, on average, in 2005.

MAJOR TRENDS IN BICYCLING

The bicycling participant population has made few shifts over the last eight years.

- Ethnicity: Over three-quarters of 2005 bicyclers are Caucasian. Hispanics comprise 11% of Participants.
- Region: Compared to 2003, a greater percentage of bicyclists live in the Western region of the U.S.

Year 2005 Events of Note

The number of mountain biking Participants has steadily dropped by 17.3 million since its peak in 2001, while the number of paved road bikers has dropped by only 4.7 million Participants over the same timeframe.

Observation/Implication

Mountain biking Participation is at greater risk of losing Participants than paved road biking.

Study Questions: "Have you gone bicycling on a paved road?"

Mountain Biking includes participants in the following: "Have you gone bicycling on a dirt track less than five feet wide? Have you gone bicycling on a dirt road more than five feet wide?"

CAMPING: 68.1 MILLION PARTICIPANTS, 365 MILLION OUTINGS

THE 2005 AMERICAN CAMPER

- Primarily male
- Participation among all age groups (mean age of 35)
- Geographically dispersed with a higher proportion living in the West and North Central regions of the U.S.
- Crossover activities include fishing, bicycling and hiking
- Went on five outings on average in 2005
- Almost one-third of participants went on a single outing in 2005

MAJOR TRENDS IN CAMPING

The camping Participant population has made few shifts over the last eight years.

- Ethnicity: Over four-fifths of 2005 campers are Caucasian. Hispanic Participation is on the rise, however, with 10% participation in 2005.

Year 2005 Events of Note

Away from car campers tend to go with friends, while car camping is more of a family activity. There is little crossover between the two activities.

Observation/Implication

Car campers and away-from-car campers must be recognized as different types of participants.

Study Questions: "Have you camped out at least one-quarter of a mile from where you parked your vehicle? Have you camped less than one-quarter of a mile from your vehicle?"

CANOEING: 20.8 MILLION PARTICIPANTS, 83 MILLION OUTINGS

THE 2005 AMERICAN CANOEING PARTICIPANT

- The majority are male (62%) and are married (56%)
- Over half are over the age of 34 with a mean age of 37
- The North Central and Northeast see the greatest concentration of canoers
- Crossover activities include hiking, camping, fishing and bicycling
- Hit the water four times on average during 2005
- Almost one in four limited their activity to only a single outing during the year

MAJOR TRENDS IN CANOEING

During the last eight years, canoeing has consistently ranked as the most popular form of paddle sports activity. Canoeing exploded in 2001 as a record number of Americans not only participated in canoeing but also participated much more frequently. However, the total number of outings has taken a significant dive since the record highs measured in 2001 and 2002. In 2005 only 83 million outings were taken compared to 134 outings in 2004, a difference of 51 million outings.

- Ethnicity: In the past two years there has been an increase in participation among Hispanic Americans. Seven percent of canoers in 2005 are Hispanic compared to 4% in 2003.

Year 2005 Events of Note

Declining frequency in canoeing is driving fewer total outings. A greater number of Hispanics are entering the sport.

Observation/Implication

A decline in outings means less need for new equipment purchases. The Hispanic population is a target where the industry should concentrate their focus.

Study Question: "Have you gone canoeing?"

HIKING: 76.7 MILLION PARTICIPANTS, 844 MILLION OUTINGS

THE 2005 AMERICAN HIKER

- Relatively balanced demographic profile by gender, household affluence, children in household and region
- Balanced age profile with an average age of 38 years
- Almost half of Westerns are participants
- Hispanics hikers are increasing in numbers
- Crossover activities include bicycling, fishing, and camping
- Hit the trails, on average, 11 times during 2005
- One in five hiked 11 or more times in 2005

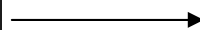
MAJOR TRENDS IN HIKING

Hiking has remained one of the most popular outdoor activities—tying with fishing and paved road biking. Participation is relatively stable with close to a third of Americans 16 and older participating in the activity. In 2000 hiking was at its lowest level of participation (31%) but was made up of individuals who participated in the activity more frequently; therefore, generating more total outings (870 million) than in 2005 (844 million).

- Ethnicity: The hiking population has become more diverse since 2003. During 2005, 9% of hikers were of Hispanic origin compared to 6% in 2003.
- Region: Hiking has grown in the Western region where 46% of all Westerns are hiking participants compared to 2003 when four in ten Westerners were hikers.
- Crossover Activities: Hikers were less likely to participate in canoeing in 2005 (18%) compared to 2003 (22%).

Year 2005 Events of Note

Hispanics hikers are increasing.



Observation/Implication

Reach out to Ethnic populations to find new participants in a saturated activity.

Study Questions: "Have you gone hiking on an unpaved trail?"

RAFTING: 10.6 MILLION PARTICIPANTS, 21 MILLION OUTINGS

THE 2005 AMERICAN RAFTER

- Primarily male and unmarried
- Mean age of 34 years
- Most likely to live in the Western region
- Crossover activities include hiking, camping, bicycling and fishing
- On average jumped in their boats two times during 2005
- Six in ten limited their activity to only a single rafting outing during the year

MAJOR TRENDS IN RAFTING

Rafting enjoyed its highest levels of participation in 2001 and 2002, but in the last three years participation levels have slipped to the benchmark levels first measured in 1998. Frequency of participation is also quite low, with the majority of rafters only taking a single trip. Only in 2002 did frequency of participation reach record high levels with the average number of outings equaling six.

- **Ethnicity:** The rafting population has become more diverse since 1998. In 2005, fewer rafters were Caucasian than they were in 2003.
- **Region:** A greater proportion of rafters live in the Western United States. Level of participation has increased in the West since 2003.
- **Crossover Activities:** In 2003, almost half of rafters were also canoers. Rafters participation in canoeing dropped to 37% in 2005.
- **Marital Status:** In 2001, when rafting was at its height, two-thirds of rafters were unmarried. In 2005 just 54% are unmarried.

Year 2005 Events of Note

Both participation and frequency of participation in rafting are low. The majority of rafters only take a single rafting outing during the year.

Observation/Implication

Increasing participation in rafting will only minimally affect total outings. Frequency of participation should be a focus.

Study Question: "Have you gone rafting?"

SNOWSHOEING: 5.5 MILLION PARTICIPANTS, 22 MILLION OUTINGS

THE 2005 AMERICAN SNOWSHOEING PARTICIPANT

- Balanced population of males and females and those who are married or unmarried
- Over one-third (34%) are between the ages of 16 and 24; 30% are over the age of 45 (mean age of 36 years)
- Most likely to live in the Northeastern region of the United States
- More likely to participate in other winter sports activities such as Telemark skiing and cross-country/Nordic skiing, compared to the total population
- Crossover activities include bicycling, camping, hiking and fishing
- Participated, on average, four times during 2005
- Fifty-seven percent only participated one or two times

MAJOR TRENDS IN SNOWSHOEING

Snowshoeing has seen relatively stable participation with between 5 and 6 million participants since 2000. Outings peaked in 2000 and 2001, but total outings still generally total between 20 and 30 million a year.

- Age: Trend results show a steady growth in 16 to 24 year-olds snowshoeing since 1999—one-third of snowshoers fall within this age group in 2005.
- Gender: Snowshoeing is more gender balanced in 2005 compared to the past three years where more males participated in the sport.

Year 2005 Events of Note

Likelihood for crossover into other winter sports is high. Younger Americans (16 to 24) are increasingly more likely to participate.

Observation/Implication

Attract other winter sports enthusiasts especially younger enthusiasts.

Study Question: "Have you gone snowshoeing?"

TELEMARK SKIING: 3.5 MILLION PARTICIPANTS, 14 MILLION OUTINGS

THE 2005 AMERICAN TELEMARK SKIER

- More gender balanced than in previous years, 43% of participants are female in 2005
- Mean age of 30 years
- Likely to participate in other winter sports such as snowshoeing and cross-country/Nordic skiing compared to the population in general
- Hit the slopes four times, on average, during 2005.
- Majority only participate once or twice each season
- Crossover activities include hiking, biking and camping

MAJOR TRENDS IN TELEMARK SKIING

Over the past eight years, participation in Telemark skiing has hovered between 1% and 2% of the total American population 16 years of age or older.

- Age: Telemark skiing continues to be a sport of young adults. Four in ten Americans who Telemark ski are between the ages of 16 and 24. In 2005, almost a third of Telemark skiers were between the ages of 35 and 44.

Note: A revision made to the description of cross-country/Nordic skiing in 2001 may have impacted trend results for this category. The description of Telemark skiing was revised in 2003 to include the following –“downhill with Telemark bindings that allow a free-heel skiing experience.”

Year 2005 Events of Note

Crossover from other winter sports activities is high. Many participants are younger (16 to 24) and mid-age (35 to 44).

Observation/Implication

The sport needs to grab the attention of other winter sports enthusiasts. The next interest group could be mid-age participants bored with other forms of getting down the slopes.

Study Question: “Have you gone Telemark skiing?”

TRAIL RUNNING: 40.4 MILLION PARTICIPANTS, 1.3 BILLION OUTINGS

THE 2005 AMERICAN TRAIL RUNNER

- Primarily male and unmarried
- Mean age of 29 years
- Most likely to live in the Western region
- Crossover activities include hiking, camping and bicycling
- Hit the trails 33 times, on average, during 2005
- Forty-one percent participated 11 or more times in 2005

MAJOR TRENDS IN TRAIL RUNNING

Trail running has maintained the growth it experienced in 2001. In 1998, there were approximately 31 million trail runners taking 900 million outings. In 2005, this has increased to 40 million trail runners taking 1.3 billion outings.

- **Ethnicity:** Comparatively, the trail running population is one of the most ethnically diverse of all of the outdoor activities measured and it is becoming more diverse. In 2004 and 2005, a greater percentage of Hispanics are participating in trail running
- **Gender & Age:** Trail running has not deviated much from being a predominately male, young adult activity.
- **Region:** During 2005, the Western region saw a surge in participation among its population.

Year 2005 Events of Note

Young males living in the West make up a good percentage of America's trail runners.

Observation/Implication

Greater and easier access to the activity provided in Western states may be driving participation in that region.

Study Question: "Have you gone running on a non-paved trail?"

BIRD WATCHING: 15.6 MILLION PARTICIPANTS, 188 MILLION OUTINGS

THE 2005 AMERICAN BIRD WATCHER

- Balanced by gender and marital status
- Just over a third have children under the age of 18 living in their household
- Over two-thirds are over the age of 35 with half over the age of 45 (mean age 45)
- Equally distributed across regions
- Went on bird watching excursions 12 times on average during 2005
- Close to a one-third limited their activity to only a single outing during the year
- Crossover activities include bicycling, fishing, hiking and camping

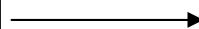
MAJOR TRENDS IN BIRD WATCHING

The combination of fewer Americans participating in bird watching and a sharp decline in the number of average outings in 2005 has led to a total number of outings in 2005 that registered well below the total number of outings generated in 2001 and 2002.

Demographically, the bird watching population has remained very stable.

Year 2005 Events of Note

One of the few outdoor activities measured where there is a predominately older participant profile.



Observation/Implication

Bring more older Americans into the out-of-doors through bird watching activities.

Study Question: "Have you gone on a bird watching excursion that involved traveling more than one-quarter of a mile from your home?"

CLIMBING: 9.2 MILLION PARTICIPANTS, 51 MILLION OUTINGS

THE 2005 AMERICAN CLIMBER

- Primarily male and unmarried
- Young, mean age of 27
- Caucasian
- Likely to live in the Western region of the U.S.
- Crossover activities include bicycling, hiking, camping and trail running
- On average went on six outings in 2005
- Close to one-third limit their activity to only a single outing during the year

MAJOR TRENDS IN CLIMBING

The climbing Participant population has remained relatively consistent over the last five years, but the average number of outings has significantly dropped from 16 in 2001 to only six in 2005.

- Gender: Males outnumber females nearly two to one.
- Age: Over half (56%) are 16- to 24-year-olds and almost one-quarter (23%) are 25- to 34-year-olds.
- Ethnicity: Over seven in ten 2005 climbers are Caucasian. Hispanic and African American Participation is on the rise directionally.

Year 2005 Events of Note

Participation in natural rock and artificial wall climbing remain fairly constant, but average outings for each are down.

Observation/Implication

The reason for decreased outings needs to be determined and the effect reversed.

Study Questions: "Have you gone climbing with a rope & harness on a natural rock surface outside? Have you gone climbing with a rope & harness on an artificial climbing wall? Have you gone climbing with a rope & harness on an extremely steep or vertical ice surface?"

FISHING: 77.3 MILLION PARTICIPANTS, 1.1 BILLION OUTINGS

THE 2005 AMERICAN FISHING PARTICIPANT

- Primarily male
- Mean age of 37
- Caucasian
- Likely to live in the South Central region of the U.S.
- Crossover activities include camping, bicycling and hiking
- Went on 14 outings on average in 2005
- Twenty-nine percent of fishing participants made 11 or more outings.

MAJOR TRENDS IN FISHING

The fishing Participant population dropped by 3.1 million Americans between 2004 and 2005. The average number of outings also dropped from 18 to 14 per Participant during this time.

- Gender: Males outnumber females two to one.
- Age: Fishing sees participation across all age levels.
- Ethnicity: Over eight in ten (81%) 2005 fishing Participants are Caucasian.

Year 2005 Events of Note

Significantly more fly fishing Participants will non-fly fish, but few non-fly fishing Participants will fly fish.

Observation/Implication

Marketing for non-fly fishing can be addressed to Participants of both activities, but marketing for fly fishing should be focused on fly fishing Participants only.

Study Questions: "Have you gone fishing? Have you gone fly-fishing? (That is fishing with a rod and reel specifically designed for fly-fishing. Please consider that fly-fishing is different than spin-cast fishing where you might use live bait.) Have you participated in any type of fishing OTHER than fly-fishing?"

KAYAKING: 12.6 MILLION PARTICIPANTS, 86 MILLION OUTINGS

THE 2005 AMERICAN KAYAKER

- Demographically balanced across genders, age, marital status, children in household and region
- Half of kayakers between the ages of 16 and 34 and half over 35 (mean age of 36 years)
- Crossover activities include bicycling, fishing, hiking and camping
- Non-whitewater kayaking most popular among kayakers
- Paddled six times on average during 2005
- More than one-third limited their activity to only a single outing during the year

MAJOR TRENDS IN KAYAKING

During 2005, the number of Americans participating in kayaking grew significantly over previous years. Although participation in the sport grew, the average number of outings remained low compared to the high levels measured in 2001 and 2003.

- Marital Status: Over the past five years, the number of married kayakers has increased.

Year 2005 Events of Note

Kayaking is very demographically balanced.

Observation/Implication

This activity has wide appeal across the US population and could be used to reach out to many different groups of Americans.

Study Question: "Have you gone touring / sea kayaking? Have you gone recreation / sit on top kayaking? Have you gone whitewater kayaking?"

About the 8th Edition Participation Study

- The annual Outdoor Recreation Participation Study is funded by the Outdoor Industry Foundation, with the purpose of annually tracking nationwide participation levels/trends for Americans 16+ years old in active outdoor recreation activities.
- The 2005 study was conducted by Leisure Trends Group, an independent research company based in Boulder, Colorado.
- The study has been conducted annually since 1998 and is the most comprehensive study of its kind focused primarily on active outdoor recreation activities in the U.S. Thirteen activities were tracked when the study began. Since then, additional activities have been added. Thus, the ability to make year to year comparisons varies by activity as well as the ability to make year to year participation comparisons to the general U.S. population. In 2005, a total of 22 activities were tracked.
- For the purpose of this study, Ethnic Americans is defined as non-Caucasians (as outlined by the U.S. Census).
- For the 8th edition, 4,000 telephone interviews were conducted using scientific sampling and random-digit-dial methodology. The result is a margin of error of +/- 1.6% at the 95% confidence level.
- Thank you to Outdoor Retailer for their generous financial underwriting without which this report would not have been possible.*

FOR A FULL COPY OF THIS REPORT, CONTACT:
OUTDOOR INDUSTRY FOUNDATION
4909 PEARL EAST CIRCLE, SUITE 200
BOULDER, COLORADO 80301
303.444.3353
RESEARCH@OUTDOORINDUSTRY.ORG
WWW.OUTDOORINDUSTRYFOUNDATION.ORG