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Table of Contents

Background and Objectives	2
Methodology	3
Summary of Key Findings	8
■ Implications	14
Overall Marketplace	18
■ Respondent Profile	19
■ Attitudes	22
■ Past 2 Year Participation	30
■ Retail	40
■ Barriers to Participation	52
Opportunities Moving Forward	62
■ Participation Interest	63
■ Activity Lifecycle	67
Activity Summary	80
■ Past 2 year cross participation	88
■ Amount spent per activity	93
■ Where participants shop (per activity)	95

Table of Contents

Profiles	100
■ Backpacking/Hiking	102
■ Biking Paved Road	110
■ Biking Off Road	118
■ Birdwatching	124
■ Cross Country/Nordic/Telemark skiing	130
■ Fly Fishing	136
■ Camping	142
■ Paddlesports	150
■ Trail Running	158
■ Climbing	164
■ Snowshoeing	170
■ Snowboard/Downhill Skiing	176
Appendix	182

Background and Objectives

Outdoor Industry Foundation (OIF) is the non-profit foundation established by Outdoor Industry Association (OIA) to support programs that increase participation in outdoor recreation and to educate the public about the economic and recreational benefits of the conservation of wild lands. OIA was founded in 1989 and provides trade services for manufacturers, distributors, suppliers, sales representatives and retailers in the outdoor industry. In its efforts to grow participation and the success of the outdoor industry, OIF commissioned Harris Interactive to conduct a consumer research study that will provide OIF with the information to develop an action plan to increase participation in human powered outdoor activities.

Specifically, this research will

- Identify and profile the current U.S. participation in human powered outdoor recreation.
- Explore the dynamics behind adoption, participation and abandonment of certain outdoor activities.
- Identify groups of the population that represent the most growth for human powered outdoor recreational activities.
- Develop strategies to help OIF effectively target and motivate key target groups that represent the highest growth opportunities.



A total of 7,682 interviews were completed online. 2,045 qualified as human powered outdoor recreational activity participants. Utilizing the Harris Interactive multimillion member online panel, interviews were conducted from October 17 to November 3, 2003.

To qualify, respondents had to meet the following criteria:

- Had to participate in one of the following outdoor recreational activities in the past two years:
 - Backpacking/Hiking
 - Camping
 - Bicycling – road
 - Bicycling – off road
 - Bird watching*
 - Cross Country/Nordic Skiing/Telemark Skiing*
 - Fly fishing*
 - Paddle Sports
 - Rafting
 - Kayaking
 - Canoeing
 - Trail running
 - Climbing
 - Snowshoeing*
 - Downhill Skiing/Snowboarding
- 16 years or older
- A U.S. resident

*Oversample participants in Bird watching, Cross country skiing/Nordic skiing/Telemark skiing, Fly fishing and Snowshoeing in order to meet the minimum sample size per activity.

Methodology

The sample of qualified respondents (2,045) broke out as follows:

	<u>% of Population that participate</u>	<u>Participate</u>	<u>Favorite</u>
Backpacking/Hiking (net)	28%	1,129	362
Camping	25%	940	259
Bicycling – road	28%	1,020	262
Bicycling – off road	10%	371	116
Bird watching	5%	218	107
Cross Country/Nordic Skiing/ Telemark Skiing (net)	2%	170	52
Fly fishing	4%	185	105
Paddle Sports (net)	15%	649	329
Trail running	6%	246	80
Climbing	5%	233	74
Snowshoeing	2%	151	47
Downhill Skiing/Snowboarding (net)	7%	354	188

Select information was also collected on 5,628 non-qualifying respondents.





Weighting:

Upon completion of data collection, we balanced survey responders (qualified and non-qualified) to be representative of the U.S. on key demographics: gender, age, income, education, race/ethnicity and geographic location. This allows the final qualified sample to be the result of the screening criteria and not specified quotas.

In addition, respondent data obtained during the over sample process for individual activity participation was adjusted to its proper proportion when looking across activity participation.

The following symbols are used throughout the report:

-  Indicates significantly greater percentage at the 90% confidence level
-  Indicates significantly lower percentage at the 90% confidence level

Note: Human powered outdoor activities, for the purposes of this report, does not include walking vigorously.





Summary of Key Findings



Summary of Key Findings

1. Human Powered outdoor activities are popular and span age and gender.

- 57% of the general population participate in at least one outdoor activity.
- Participants are approximately evenly split across age and gender.

2. Participation in human powered outdoor activities is a way of life that is supported by family and friends. "People you know" is the biggest influencer in attracting new participants to an outdoor activity.

- 90% of current participants have been participating since a young age.
- 63% participate in more than one outdoor activity.
- Parent/family/friends were the biggest influence in getting the current participants started in an outdoor activity.
- 79% feel participation strengthens family relationships.



Summary of Key Findings

3. Even though participation in outdoor activities is a way of life, there appears to be a lifecycle of participation in activities that illustrates a lull in participation on average in the participant's mid-twenties.

- Over half of participants have stopped their favorite activity for a period of time.
- Level of participation significantly decreases in the 25-34 age group whether marriage and kids are involved or not.

4. The longevity of outdoor participation is rooted not only in the functional health benefits but also in the emotional benefits of actual participation.

- Over three-fourths of participants agree that participating in outdoor activities gives them a feeling of accomplishment, an escape from life pressures, and a connection with themselves.
- 63% like the physical challenge.
- 79% are proactive about their health.



Summary of Key Findings

5. Discount stores offer participants a convenient place to shop for outdoor apparel and equipment at reasonable prices, however, this outlet is probably only used for the incidental items.

- Over half of participants have purchased apparel and equipment at discount stores.
- However, when it comes to high quality and reliable merchandise, participants are more likely to go to outdoor specialty shops or outdoor chain stores.
- In addition, participants spend more at outdoor specialty shops than any other type of outlet—significantly more than at discount stores.

6. There are many barriers to participation in human powered outdoor activities. Whether it is starting participation, continuing participation or frequency of participation, the most prevalent barriers are time and money.

- Top challenges for getting people to participate are being too busy (for adults) and the costs associated with gear and equipment.
- 4 in 10 participants feel they have too many other commitments in life right now to consider outdoor activities.
- Top reasons for permanently stopping an activity for people under the age of 44 relate to time commitments to school, children, household maintenance, etc.

Summary of Key Findings

7. There are many people who would be interested in OIA's outreach program.

- A quarter of those who are currently NOT participating in a human powered outdoor activity show an interest in participating in one of the activities the next 2 years.
- Approximately 8 in 10 current human powered outdoor activity participants are interested in new activities.
- As for those who have currently lapsed, this is due to time constraints rather than disinterest.

8. Hiking, bicycling on paved roads and camping are the key human powered outdoor activities that serve as an entrance to the more challenging activities.

- Hiking, bicycling on paved road and camping are the most popular and the most accessible human powered outdoor activities.
- Participants of nearly all other non-key activities also participate in one or more of the key activities.
 - Among participants of climbing, 73% bicycle, 72% hike/backpack.
 - Among participants of paddle sports, 61% hike/backpack, 54% camp.
 - Among cross country/Nordic/Telemark skiers, 71% bicycle, 74% hike/backpack, and 59% camp.



Summary of Key Findings

9. The youngest age group is key to building participation in human powered outdoor activities in the future.

- 16-24 year olds are already more likely to participate in human powered outdoor activities than the general population.
- They participate in more activities than older age groups.
- And are more frequent participators.
- Older age groups cite injury or poor health as the barrier to participating in outdoor activities. This is a harder obstacle to overcome than prioritizing time.



Implications

1. Invest in recruiting participants at a young age and they will be a life long participant.

Participation in human powered outdoor activities is an ingrained behavior. Most participants start at a young age and are heavily influenced by already participating parents or close friends. Starting participants young, teaches children to love and appreciate the outdoors. The personal challenge and health benefits are what are going to keep them participating throughout their lives. Helping current participants involve their young kids earlier will facilitate the ingrained behavior.

Recruiting adults that are not currently involved may be more profitable for specialty stores at the start because they have more money to spend, but the lifestyle is not as ingrained. Therefore we believe that their commitment to outdoor participation is less and they would be more likely to lapse in the behavior.



Implications

2. Target the human powered outdoor activities – hiking, biking and camping – that are popular, easily accessible, affordable and are entrance activities to other, less accessible activities.

Hiking, biking and camping have stood the test of time. They have the greatest longevity of any of the human powered outdoor sports. In addition, participators in these activities are more likely to try and participate in other sports.



3. Communicate through the local outdoor specialty stores, schools, businesses and community organizations to raise awareness of accessibility of activities and encourage participation.

The largest barrier to participation in outdoor activities is time, even for young adults. Between their schoolwork, organizations they belong to and other school sports like soccer, basketball and football, teens and kids do not have a lot of free time. Sponsorship of events through schools or child organizations would give young participants the opportunity to try or continue human powered outdoor activities, even if their parents are too busy to be involved with them. Sponsorship will also keep the cost down for the individual participator.

- Communicate the social aspect of the event as well as the connection with nature. Make the outings open to the entire family.
- Outdoor specialty stores can either sponsor their own events or can co-sponsor events with community organizations or schools. They can position themselves as *the expert* in the outdoor activity.

Implications

Accessibility of outdoor participation is also an issue. Raise the awareness level of all the areas in which human powered outdoor activities are available at the local level.

- Post a link or information on the city/town's website stating where the local recreational areas are and what is available at each. This information could also be included as part of the town's information packet in the "newcomers club".
- The local outdoor specialty store could also be the keeper of this information as well as current information about upcoming events. They could have an activity board posted in their store or on their website that not only posts events but posts the local recreational areas and what they have to offer.

Encourage people of all ages to participate in outdoor activities.

- Local outdoor specialty shops, as part of the community, should network to find local businesses/companies, organizations like the PTA, that would be receptive to sponsoring an outing among their constituents or an informational seminar that will create awareness of what is available in the area.



Overall Marketplace



Demographic Profile Summary

Demographically, participants in human powered outdoor activities span age groups, geographic regions, and gender lines.

- 43% of participants are between the ages 16-34 and 57% of the participants are 35 years or older.
- Gender is evenly split (52% male, 48% female).

Compared to the general population, participants in human powered outdoor activities skew younger, more upscale and have families. In addition, a higher share of outdoor participants live in the West compared to the General population.

- Average age of human powered outdoor activity participants is 38.8 years vs. the general population at 43 years.
- More human powered outdoor activity participants have children (47%) compared to the general population (43%).
- And human powered outdoor activity participants have a higher household income (\$57,800 vs. \$50,700 respectively).



Respondent Demographic Profile

	Gen. Pop. (7682)	Participants (2054)
Age		
16-24	15%	24%
25-34	18%	19%
35-44	22%	19%
45+	44%	38%
Average age	43.0 years	38.8 years
Gender		
Male	49%	52%
Female	51%	48%
Race		
White	77%	76%
Some College or More	55%	63%
Employed	60%	64%
Married/Living with Partner	62%	55%
Average Number of Adults in Household	2.2	2.3
Have Children	43%	47%
Average Age of Children	9.9 years	10.2 years
Median Household Income	\$50,700	\$57,800

Respondent Demographic Profile

	Gen. Pop. (7682)	Participants (2054)
Census Regions		
East	23%	21%
South	31%	27%
Midwest	24%	26%
West	22%	26%
Type of Area Live		
Urban/City	26%	27%
Suburban	31%	33%
Small town	26%	25%
Rural	17%	15%





Attitudes



Attitudes Summary

Overall, participants are involved in outdoor activities for more than just the functional benefits. They are in it for the emotional benefits.

- 88% of participants enjoy the feeling of accomplishment.
- 88% of participants feel the natural setting allows them to escape the pressures of everyday life.
- 79% of participants feel it keeps them feeling young.
- And 76% of participants feel it allows them to connect with themselves.

Because of the emotional benefits, participating in outdoor activities is a life- long experience that they want to share, especially with family.

- 67% of participants state they have been participating in outdoor activities for as long they can remember.
- 77% of participants know how to get started in any outdoor activity that interests them.
- 55% of participants would like their children to experience more outdoor recreational activities.
- And 79% of participants feel outdoor activities strengthen family relationships.



Attitudes Summary

Many participants are proactive about their health and outdoor activities are part of their healthy lifestyle.

- 79% of participants state they are proactively take charge of their health.
- 63% of participants like activities that are physically challenging.
- 47% of participants push themselves to best their previous performance.
- And 50% of participants participate in outdoor activities as the main way they get their exercise.

Although outdoor activities are important to the participants, time is an issue for many, so they choose to participate only when the weather cooperates.

- 38% of participants state they have too many commitments in their lives to consider outdoor activities.
- 59% of participants participate only when the weather cooperates.
- 28% of participants would rather exercise indoors than outdoors.



Attitudes Summary

In general, there are few differences in attitudes driven by age. If a participant is involved in outdoor recreational activities they get the same emotional benefits regardless of age.

- 16-24 year olds are more likely to be involved in more physically challenging activities.
- While older participants are driven to participate in activities because of health reasons.



Attitudes - Attitudinal Factors

In order to get a sense of outdoor sport participants' attitudes toward outdoor activities, respondents were asked their level of agreement toward 28 statements.

Factor Analysis was conducted to classify individual statements into a smaller number of underlying dimensions.

Outdoor Connection

Inexperience

Fairweather
Participators

Less Active

Outdoor Extreme



Attitudes Toward Outdoor Activities Strongly Agree/Agree

	Participants				
	Total (2054) %	Age 16-24 (498) %	Age 25-34 (380) %	Age 35-44 (397) %	Age 45+ (779) %
Outdoor Connection					
I enjoy the feeling of accomplishment after participating in an outdoor activity	88	89	92	89	85
Getting into a natural setting allows me to escape the everyday pressures of life	88	83	87	89	91
I am doing my part to protect the environment	83	71	75	87	94
Participating in outdoor activities strengthens our family's relationship with one another	79	67	82	91	79
Participating in outdoor activities keeps me feeling young	79	73	79	77	83
I would know how to get started in a new outdoor activity that interests me	78	77	73	76	78
Participating in outdoor activities allows me to connect with myself	76	73	77	74	79
Even though there are many things I would like to own, I prefer spending money on the <u>experiences</u> that will enrich my life	73	71	72	74	76
I try to spend as much time outdoors as possible	63	58	57	64	67
Participating in outdoor activities is the main way I get my exercise	50	52	43	53	50
I consider myself a very social person	67	67	63	65	70
I would like my children to experience more outdoor recreational activities, such as hiking, camping, fishing or canoeing	55	26	51	68	66

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Attitudes Toward Outdoor Activities Strongly Agree/Agree

Participants					
	Total (2054) %	Age 16-24 (498) %	Age 25-34 (380) %	Age 35-44 (397) %	Age 45+ (779) %
Less Active					
I proactively take charge of my own health (negative)	79	75	67	76	89
I was more active in the past than I am now	70	58	73	69	77
I have too many other commitments in my life right now to consider outdoor activities	38	43	42	39	33
My weight sometimes prevents me from participating in various activities	28	19	33	25	34
I think watching TV or videos together is a great way to build family relationships	45	55	49	47	36
Inexperience					
I've been participating in some sort of outdoor activity for as long as I can remember(negative)	67	65	57	65	74
I never really had a mentor in my life who taught me about the outdoors	50	47	52	48	54
I am not very experienced in outdoor activities	37	36	45	35	36
My idea of "roughing it" is spending the night in a cheap hotel	21	15	20	19	26
Outdoor Extreme					
I like activities that are physically challenging	63	76	65	64	53
I push myself to best my previous physical performance	47	67	40	43	39
I engage in outdoor activities that are considered "extreme"	15	35	13	9	7

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Attitudes Toward Outdoor Activities

Strongly Agree/Agree

Fairweather Participators

I only participate in outdoor activities when the weather cooperates

I would much rather exercise indoors than outdoors

I think most outdoor sports are too extreme

I hate to travel

Participants				
Total (2054) %	Age 16-24 (498) %	Age 25-34 (380) %	Age 35-44 (397) %	Age 45+ (779) %
59	51	70	54	61
28	28	36	21	27
14	10	14	13	17
8	6	9	7	10





Past 2 Year Participation



Past 2 Year Participation Summary

Outdoor recreational activities in general are popular among the U.S. population and human powered outdoor activities is a driving force behind that popularity.

- 91% of the U.S. population has participated in at least one outdoor activity including swimming, gardening, golf, boating, etc.
- 57% of the U.S. population has participated in at least one human powered outdoor activity, with an average participation frequency of 54 times in the past 2 years.

The most popular human powered outdoor activities revolve around activities that are affordable and easily accessible – bicycling, hiking and camping.

- 30% of the population currently bicycle mainly on paved roads for an average of 52.3 times in the past 2 years.
- 27% of the population currently hike an average of 21.5 times in the past 2 years.
- And 25% of the population currently camp an average of 5.8 times in the past 2 years.
- These outdoor sport activities are also the most favored activities among participants.



Past 2 Year Participation Summary

Not surprisingly, as people age, participation overall, and in the more physical human powered outdoor activities, declines.

- 67% of 16-24 year olds participate in outdoor activities compared to only 47% of 45+ year olds.
- Activities such as bicycling, hiking, camping, paddle sports, trail running and climbing have lower participation levels among the 45+ age group.
 - This is true for most of the human powered outdoor sports except bird watching, fly fishing, cross country/Nordic skiing and snowshoeing.
- In addition, younger participants of human powered outdoor activities are more likely to be more frequent participators in the sports they are participating in. (16-24 year olds have participated in an outdoor activity an average of 64 times in the past 2 years vs. 55 times for 45+ year olds).



Participation Summary

	Gen. Pop.	Participants
	(7682)	(2054)
Participate in any outdoor activity	91%	100%
Average # of outdoor activities	4.3	6.1
Participate in human powered outdoor activities	57%	100%
Participate in 1 activity	22%	41%
Participate in 2 activities	13%	21%
Participate in 3+ activities	22%	38%
Average # of human powered activities	1.3	2.6
Plan to participate in additional outdoor activities	45%	77%
Currently <u>do not</u> participate in human powered outdoor activities	43%	-
Used to participate	33%	-
Plan to participate	24%	-

Past 2 Year Participation

	General Population					Participants
	Total (7682)	Age 16-24 (1182)	Age 25-34 (1384)	Age 35-44 (1743)	Age 45+ (3359)	(2054)
	%	%	%	%	%	%
Participate in any activity	91	91	91	93	89	100
Participate in any human-powered activity	57	67	65	62	47	100
Bicycling (net)	30	41	35	31	24	53
Bicycling - paved road	28	39	31	29	23	50
Bicycling - off road	10	17	12	10	7	15
Hiking/Backpacking (net)	28	35	33	32	22	49
Hiking	27	32	31	31	22	47
Backpacking	8	13	10	9	4	13
Camping in a tent	25	32	33	31	16	43
Paddle Sports (net)	15	25	16	14	12	29
Canoeing	10	15	10	9	7	17
Rafting	6	11	7	6	4	11
Kayaking	5	9	4	5	4	9
Downhill skiing/Snowboarding (net)	7	16	10	7	4	13
Downhill skiing (with lift access)	6	10	7	6	4	10
Snowboarding (with lift access)	3	9	5	1	-	4
Trail running	6	17	6	5	2	12
Climbing	5	16	5	4	2	9
Bird watching	5	2	4	5	6	7
Fly-fishing	4	3	3	5	5	7

Past 2 Year Participation (continued)

	General Population					Participants
	Total (7682) %	Age 16-24 (1182) %	Age 25-34 (1384) %	Age 35-44 (1743) %	Age 45+ (3359) %	(2054) %
Cross-country/Nordic skiing/ Telemark (net)	2	4	3	2	2	5
Cross-country/Nordic skiing	2	3	2	2	2	5
Telemark skiing	-	1	-	1	-	1
Snowshoeing	2	2	2	2	2	3
Other Recreational Activities						
Swimming	47	68	52	52	35	61
Walking vigorously for exercise	43	38	41	44	45	49
Gardening	43	20	34	46	53	45
Jogging/Working out	38	63	47	37	25	47
Conventional fishing	24	18	23	29	24	30
Boating	21	25	20	21	19	29
Golf	16	18	17	17	14	21
Off road recreation	9	14	14	11	5	13
Hunting	9	7	9	11	8	11
Water skiing	4	9	6	3	2	9
Snowmobiling	3	5	5	4	2	5
Surfing/Wind surfing	2	5	2	2	1	3
Adventure racing	1	3	3	1	-	1
Other outdoor activity	19	24	21	20	15	23
I do not participate in recreational activities	9	9	9	7	11	-

Number of Outdoor Activities Participate In

Participants					
	Total (2054) %	Age 16-24 (498) %	Age 25-34 (380) %	Age 35-44 (397) %	Age 45+ (779) %
One	37	23	38	38	47
Two	21	22	20	19	22
Three	13	13	11	20	12
Four	9	13	13	8	5
Five	8	7	9	8	7
Six or more	12	22	9	8	7
Average # of human powered outdoor activities participate in	2.6	3.4	2.5	2.6	2.2



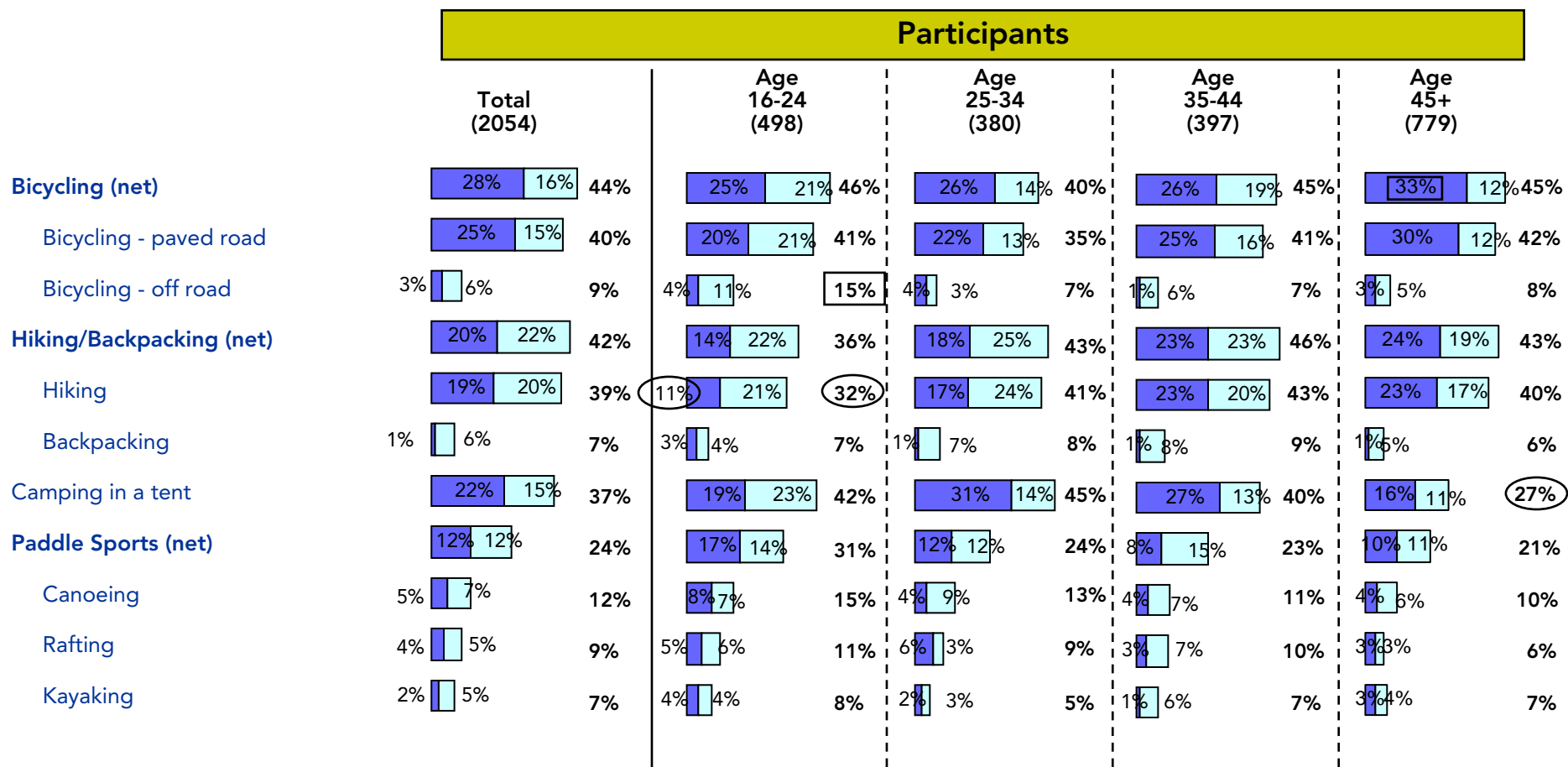
Number of Times Participate in Outdoor Activities in Past 2 Years*



	Participants				
	Total	Age 16-24	Age 25-34	Age 35-44	Age 45+
Overall	54.4	64.4	40.2	53.6	55.4
Bicycling (net)	52.3	51.8	43.8	47.6	59.9
Bicycling - paved road	46.2	44.9	33.2	44.0	54.6
Bicycling - off road	29.0	21.5	44.1	24.9	34.2
Hiking/Backpacking (net)	22.6	20.0	18.1	22.6	26.8
Hiking	21.5	19.0	17.4	20.4	26.1
Backpacking	7.2	6.4	5.9	8.6	7.2
Camping in a tent	5.8	5.3	5.6	4.8	7.3
Paddle Sports (net)	5.6	4.8	5.2	5.5	6.8
Canoeing	4.7	3.3	3.9	4.3	7.2
Rafting	2.7	3.0	1.9	2.8	2.8
Kayaking	5.5	4.4	8.6	4.1	6.1
Downhill skiing/Snowboarding (net)	10.7	11.1	13.1	8.0	10.3
Downhill skiing (with lift access)	9.6	9.5	10.9	7.5	10.1
Snowboarding (with lift access)	9.2	8.7	**	**	**
Trail running	63.3	47.0	32.5	103.4	89.7
Climbing	7.6	8.3	4.5	5.4	**
Bird watching	19.6	**	**	23.7	20.4
Fly-fishing	9.0	--	--	12.0	8.5
Cross-country/Nordic skiing/Telemark (net)	9.1	6.5	**	**	12.6
Cross-country/Nordic skiing	8.5	6.2	**	**	11.1
Telemark skiing	**	**	**	**	**
Snowshoeing	6.7	**	**	**	8.3

*Mean

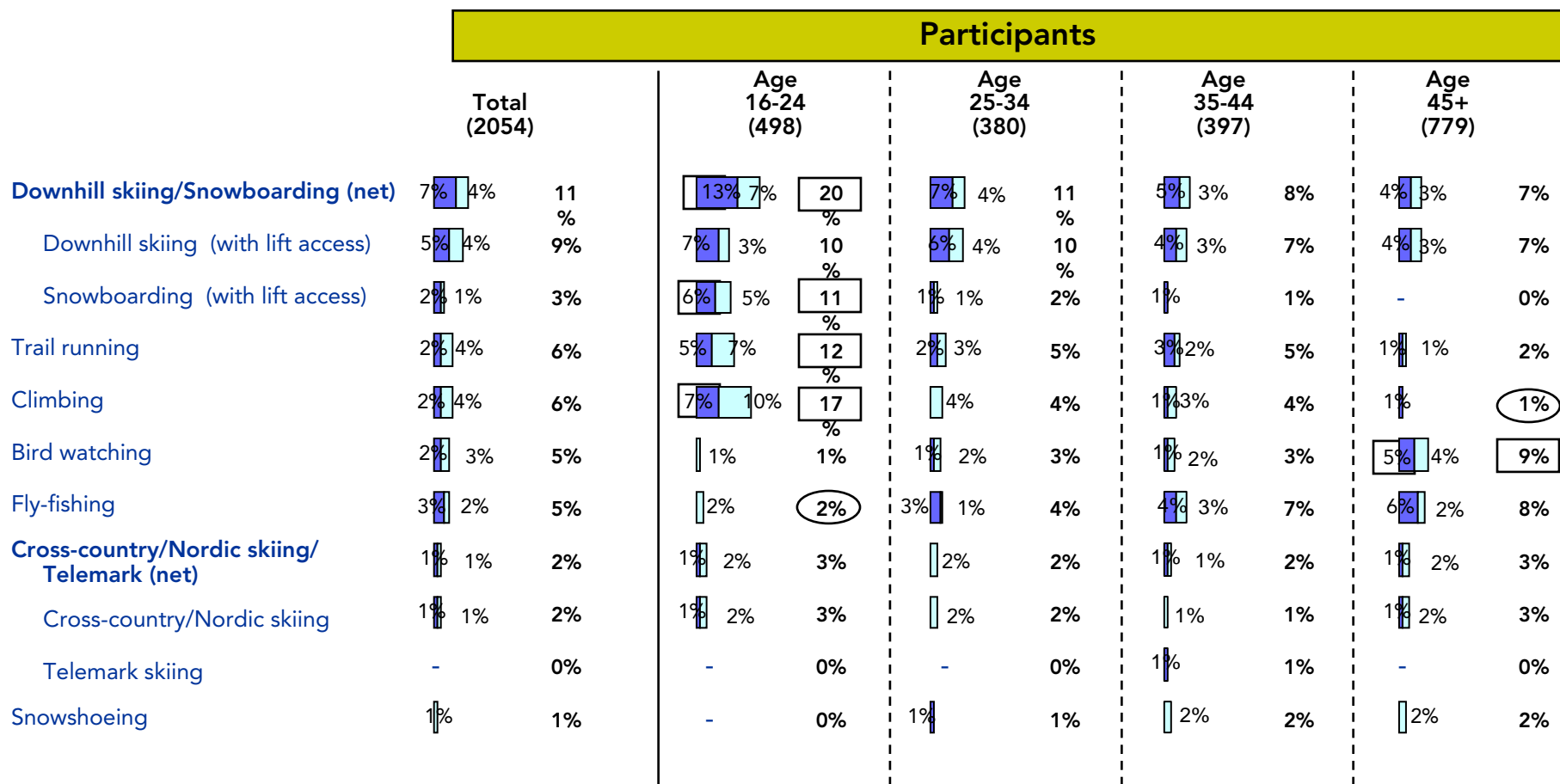
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Favorite Activities Among Participants



 Top favorite activity
 2nd & 3rd favorite activity

Favorite Activities Among Participants



 Top favorite activity
 2nd & 3rd favorite activity



Retail



Participation in outdoor activities is not inexpensive, especially for equipment.

- Participants spend an average of \$787 -- \$301 on apparel and \$487 on equipment.
- 16-24 year olds spend the least amount at \$540.

The most frequented type of store for purchasing both apparel and equipment is discount stores, followed by sporting goods stores.

- 57% of participants have purchased apparel, and 60% have purchased equipment, at discount stores.
- 49% of participants have purchased apparel, and 40% have purchased equipment, at sporting goods stores.
- Nearly one-third of participants have purchased apparel and equipment from outdoor specialty stores.



The top reasons to purchase at a particular outlet revolve around price, convenience and quality.

- Has reasonable/fair prices is most frequently mentioned (69%).
- Convenient location is mentioned by 52% of participants.
- Quality of the merchandise is mentioned by 49% of participants.

The least important reasons revolve around rewards programs, activity information and knowledgeable sales people.

Outdoor specialty stores and outdoor chain stores are perceived similarly, although outdoor chain stores excel on key items.

- Outdoor chain stores excel on many important reasons to purchase, especially:
 - Has gear/equipment want/need
 - Good quality merchandise/reliable dependable products
 - Has clothing want/need
 - Good selection/variety
 - Knowledgeable/experienced sales people
- Outdoor specialty stores also excel on knowledgeable/experienced sales people and has unique items/specialty products.

Retail Summary

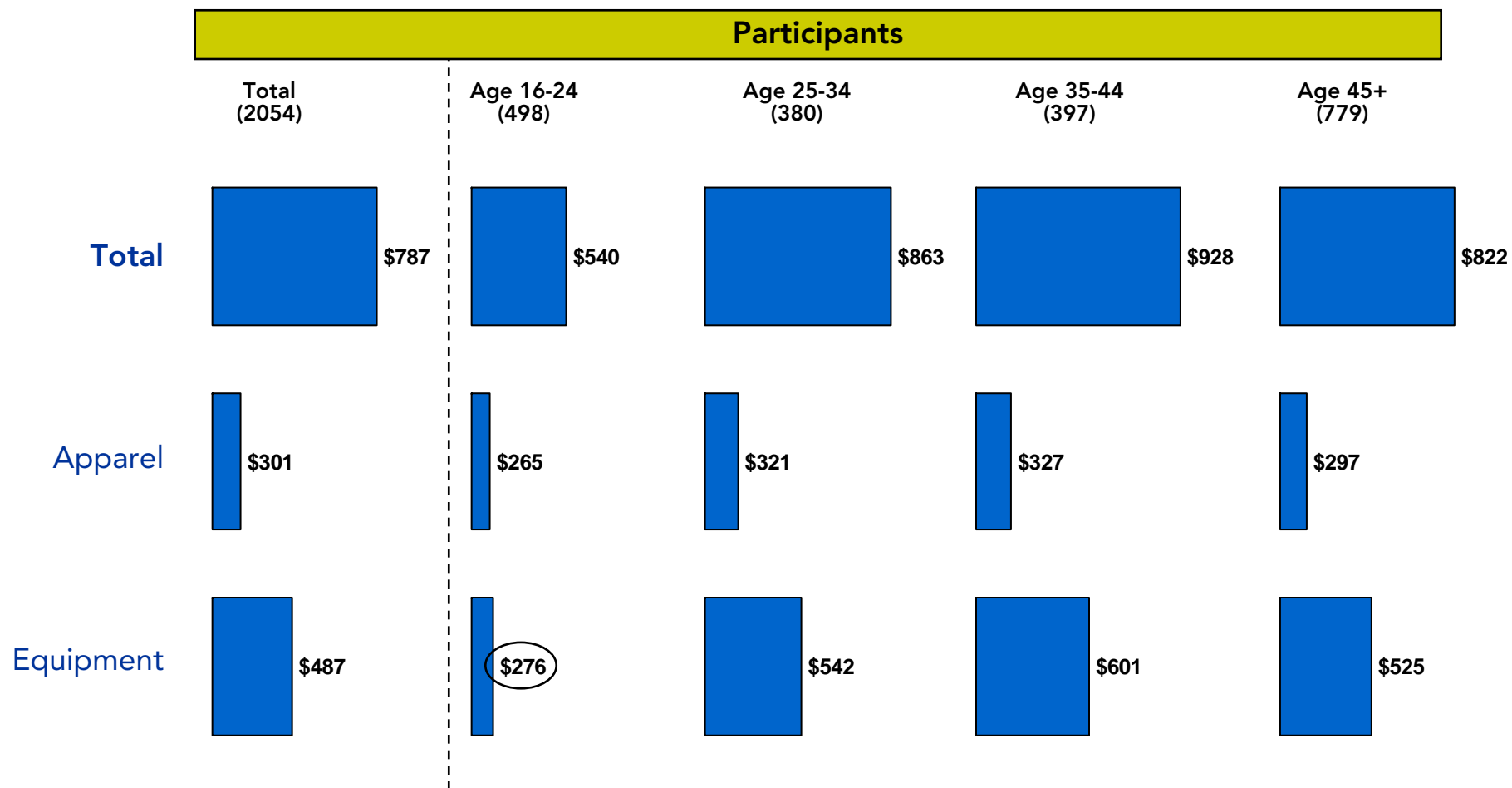
Discount stores excel at two of the most important reasons to shop at a store – fair prices and convenient location.

Although discount stores are frequented, participants in outdoor activities spend more money at specialty stores.

- Participants spend an average of \$1,485 at specialty stores compared to only \$848 at discount stores.
- Participants have also spent a considerable amount online, \$1,656.



Retail - Amount Spent*



*Past 2 years



Retail

Type of Store Where Participants Shop

	Participants	
	Apparel/Footwear (1778)	Equipment (1444)
	%	%
Discount stores (net)	57	60
Discount stores – such as Wal-Mart, Target, Kmart or Kohl's	56	59
Discount store websites	3	3
Discount store catalogs	3	2
Sporting good stores (net)	49	40
Sporting good stores – such as Dick's, Sports Authority or Sport Chalet	44	37
Sporting goods store websites	7	4
Sporting goods store catalogs	6	3
Outdoor specialty stores (net)	29	29
Outdoor specialty stores – exclusively sell outdoor merchandise	24	24
Outdoor specialty store websites	8	8
Outdoor specialty store catalogs	6	5
Outdoor chains stores (net)	28	23
Outdoor chain stores – such as REI, L.L. Bean, Cabelas	25	20
Outdoor chain store websites	7	5
Outdoor chain store catalogs	5	4
Department stores (net)	22	8
Department stores – such as Macy's or Nordstrom	19	6
Department store websites	3	1
Department store catalogs	3	1
Websites (net)	19	14
Factory outlet stores	1	-
Online/eBay	1	7
Other	5	1
Not sure	3	4

Retail - Type of Store Where Participants Shop Most Often

	Participants	
	Apparel/Footwear (1778)	Equipment (1444)
	%	%
Discount stores (net)	35	42
Discount stores – such as Wal-Mart, Target, Kmart or Kohl's	34	41
Discount store catalogs	1	1
Discount store websites	-	-
Sporting good stores (net)	25	20
Sporting good stores – such as Dick's, Sports Authority or Sport Chalet	23	19
Sporting goods store websites	1	-
Sporting goods store catalogs	1	1
Outdoor specialty stores (net)	12	15
Outdoor specialty stores – exclusively sell outdoor merchandise	9	12
Outdoor specialty store websites	2	2
Outdoor specialty store catalogs	1	1
Outdoor chains stores (net)	12	12
Outdoor chain stores – such as REI, L.L. Bean, Cabelas	9	10
Outdoor chain store websites	2	1
Outdoor chain store catalogs	1	1
Department stores (net)	9	2
Department stores – such as Macy's or Nordstrom	7	2
Department store catalogs	1	-
Department store websites	1	-
Websites (net)	6	5
Factory outlet stores	1	-
Online/eBay	-	-
Other	3	4
Not sure	3	4

Retail

Most Important Reasons for Purchases

	Participants		
	Overall (1801)	Apparel (1699)	Equipment (1372)
	%	%	%
Has reasonable/fair prices	69	59	56
Has the gear and equipment I want/need	53	40	48
Convenient location	52	41	41
Has good quality merchandise/reliable, dependable products	49	41	36
Has the clothing I want/need	47	39	21
Has a good selection/variety of products	44	38	36
Has the brands I want	42	31	28
Has good sales/frequent sales	39	32	25
One stop shopping	37	34	36
Has the sizes I want	32	31	18
Has good return policy	30	24	24
Has good guarantee/stand behind products	26	20	19
Has unique items/specialty products	24	16	19
Knowledgeable/Experienced salespeople	22	16	19
Salespeople are willing to help/Has available salespeople	20	15	16
Fun store/fun place to shop	19	14	15
Salespeople are friendly and approachable	17	13	13
Has the technical, advanced level products I want/need	15	10	13
Has additional information about the activity(ies) I am interested in	12	8	11
Has a rewards program for purchases made	7	4	6
Other	2	2	2

Retail - Most Important Reasons for Purchasing Apparel

	Participants					
	Outdoor Specialty Stores (226)	Outdoor Chain Stores (270)	Sporting Goods Stores (440)	Department Stores (132)	Discount Stores (580)	Web (99)
	%	%	%	%	%	%
Has the gear and equipment I want/need	56	68	47	19	27	52
Has good quality merchandise/reliable, dependable products	54	71	41	42	27	56
Has reasonable/fair prices	56	51	43	44	78	66
Has unique items/specialty products	45	32	19	5	2	39
Has the clothing I want/need	43	56	44	35	31	52
Has a good selection/variety of products	42	56	44	28	27	45
Knowledgeable/Experienced salespeople	34	35	17	16	2	14
Has the brands I want	34	33	38	38	21	36
Has the sizes I want	29	29	27	34	29	42
Has the technical, advanced level products I want/need	23	26	12	3	1	9
Salespeople are willing to help/Has available salespeople	23	28	12	15	11	3
Has good guarantee/stand behind products	22	48	15	18	13	27
Convenient location	23	23	36	44	59	19
One stop shopping	21	39	29	20	44	34
Has good return policy	19	35	15	21	31	42
Has additional information about the activity(ies) I am interested in	17	20	12	1	1	12
Salespeople are friendly and approachable	17	18	12	11	11	3
Has good sales/frequent sales	15	21	26	38	42	36
Fun store/fun place to shop	11	19	13	13	14	7
Has a rewards program for purchases made	2	13	6	3	2	10
Other	5	2	1	2	2	4

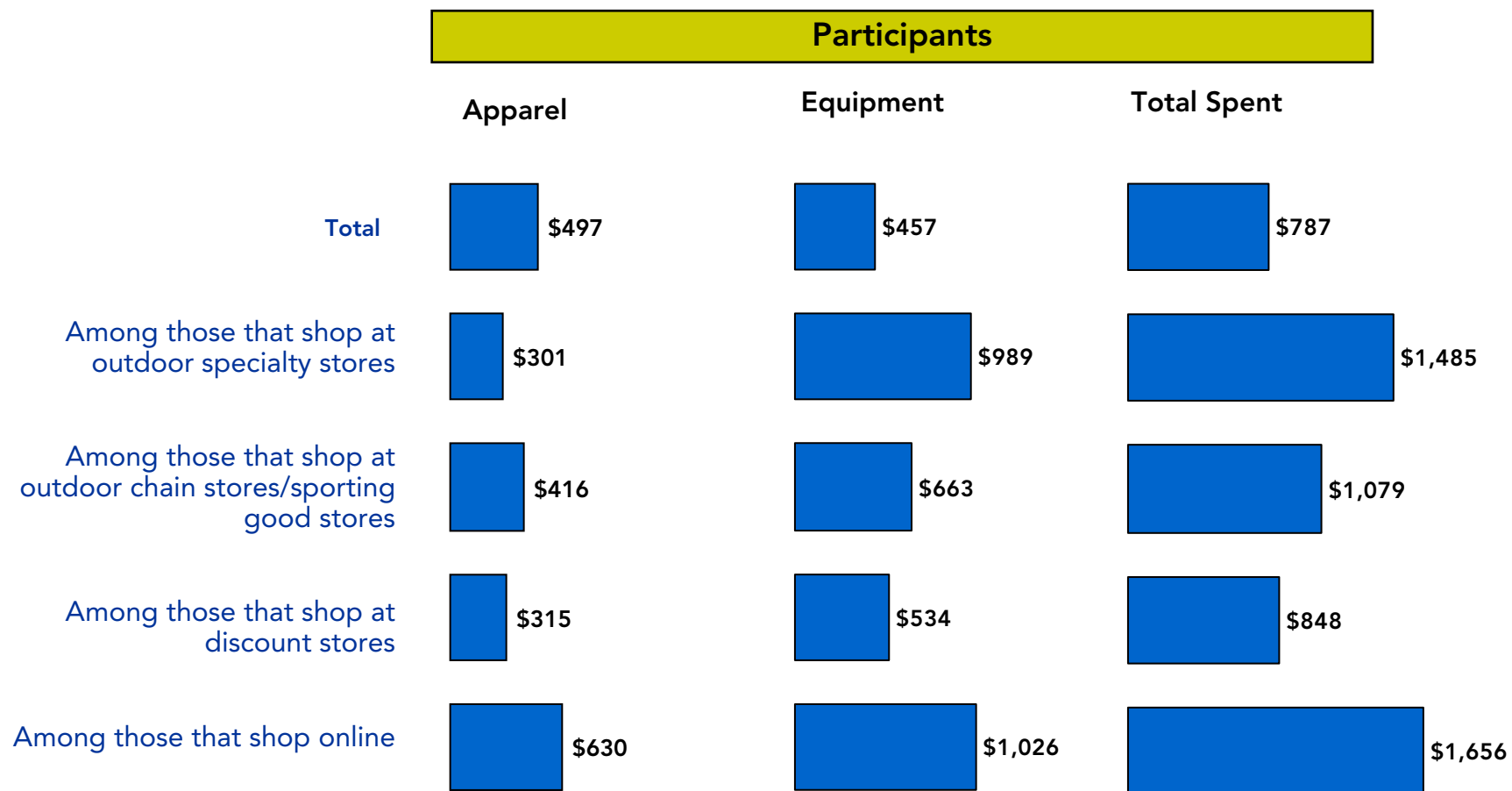
Retail - Most Important Reasons for Purchasing Equipment

	Participants				
	Outdoor Specialty Stores (253) %	Outdoor Chain Stores (213) %	Sporting Goods Stores (290) %	Discount Stores (535) %	Web (86) %
Has the gear and equipment I want/need	63	63	49	39	56
Has good quality merchandise/reliable, dependable products	48	68	36	24	41
Has a good selection/variety of products	42	53	46	26	41
Has unique items/specialty products	41	38	17	5	44
Knowledgeable/Experienced salespeople	40	34	30	3	4
Has the technical, advanced level products I want/need	36	30	9	2	23
Has the brands I want	35	35	33	21	37
Has reasonable/fair prices	33	41	42	74	55
One stop shopping	28	33	23	49	40
Convenient location	26	17	40	55	17
Has good guarantee/stand behind products	23	47	17	12	34
Salespeople are willing to help/Has available salespeople	23	26	20	9	4
Has additional information about the activity(ies) I am interested in	20	22	17	2	8
Salespeople are friendly and approachable	20	22	14	8	3
Has the clothing I want/need	19	34	26	16	30
Has good sales/frequent sales	18	22	19	32	24
Fun store/fun place to shop	18	20	14	14	11
Has good return policy	16	35	11	32	23
Has the sizes I want	15	22	20	17	28
Has a rewards program for purchases made	5	18	6	2	13
Other	3	1	1	1	3

*Department Stores not shown due to small base size.



Retail - Amount Spent*



*Past 2 years





Barriers to Participation in Outdoor Activities



Barriers to Participation Summary

As age increases, the likelihood of lapsing increases.

- 33% of the U.S. population no longer participate in the outdoor activity they participated in when they were 5-18 years old, but they may be involved in others.
- 22% of 16-24 year olds have lapsed while 40% of those 45+ have lapsed.

Reasons for lapsing vary by age.

- Time commitments related to school, children, and household maintenance are the major reasons non-participants under age 44 have lapsed from their outdoor activities.
- The 45+ age group are more likely to cite physical health reasons, injury and “just don’t enjoy the activity any more”.



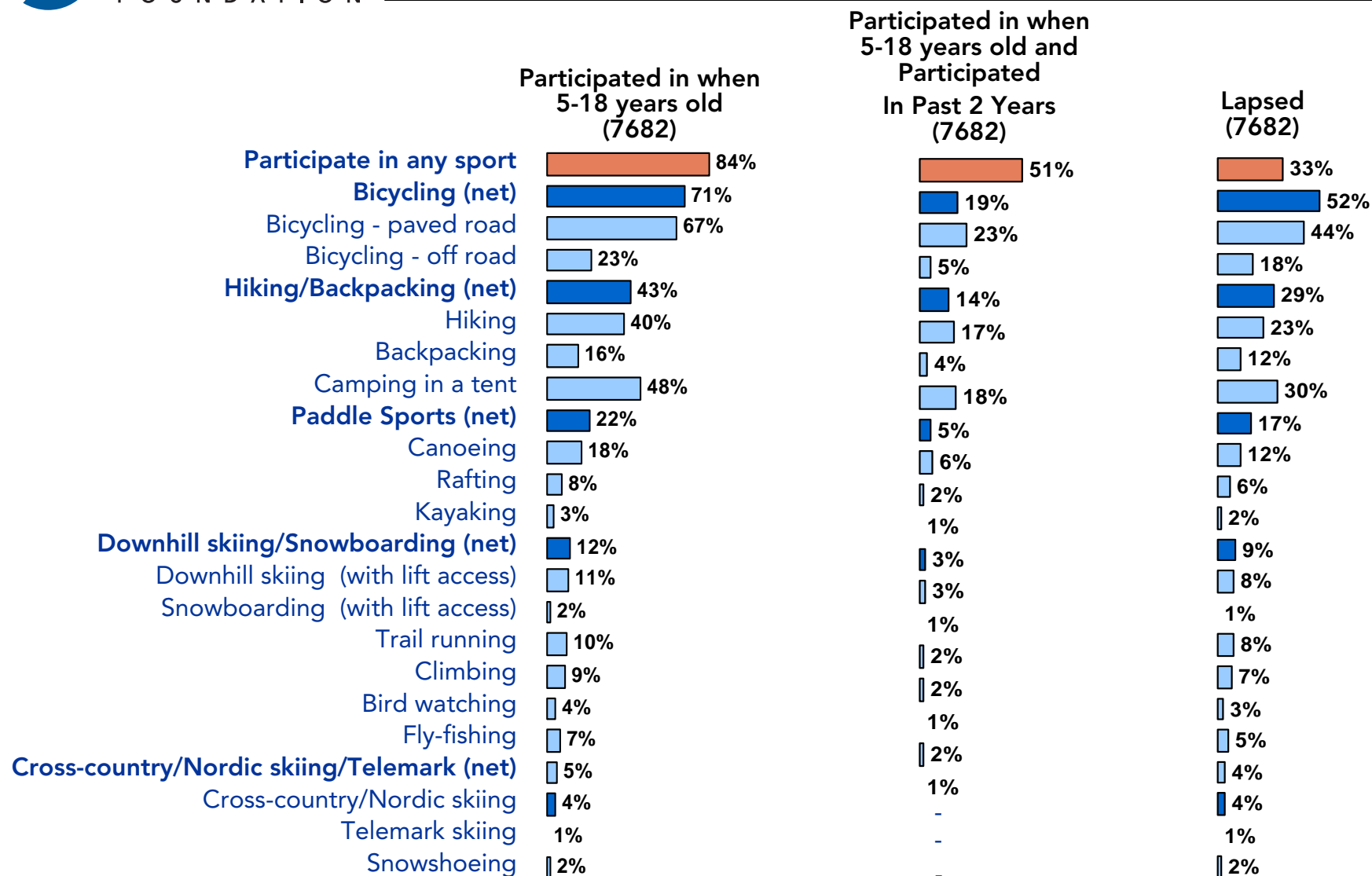
Barriers to Participation - Summary

In addition, participants feel time and money are the main barriers to participation.

- 60% of participants feel they don't have enough time to participate in outdoor activities.
- 39% of participants feel that costs associated with outdoor activities are a barrier to participation.
- Additionally, even though most agree they would know how to get started in an outdoor activity of interest to them, 30% feel getting started is a barrier to participation.

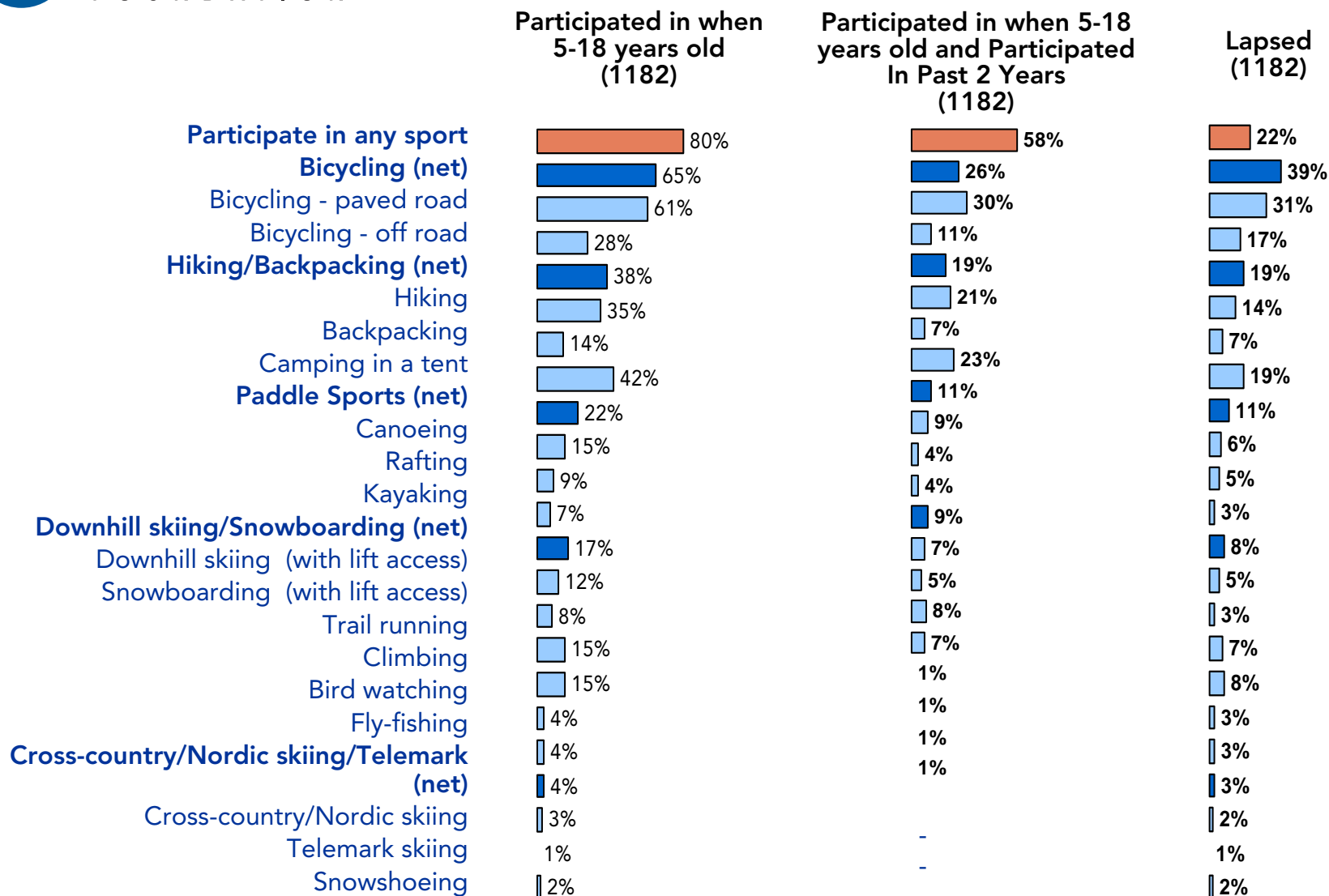


Lapsed Activities Among General Population



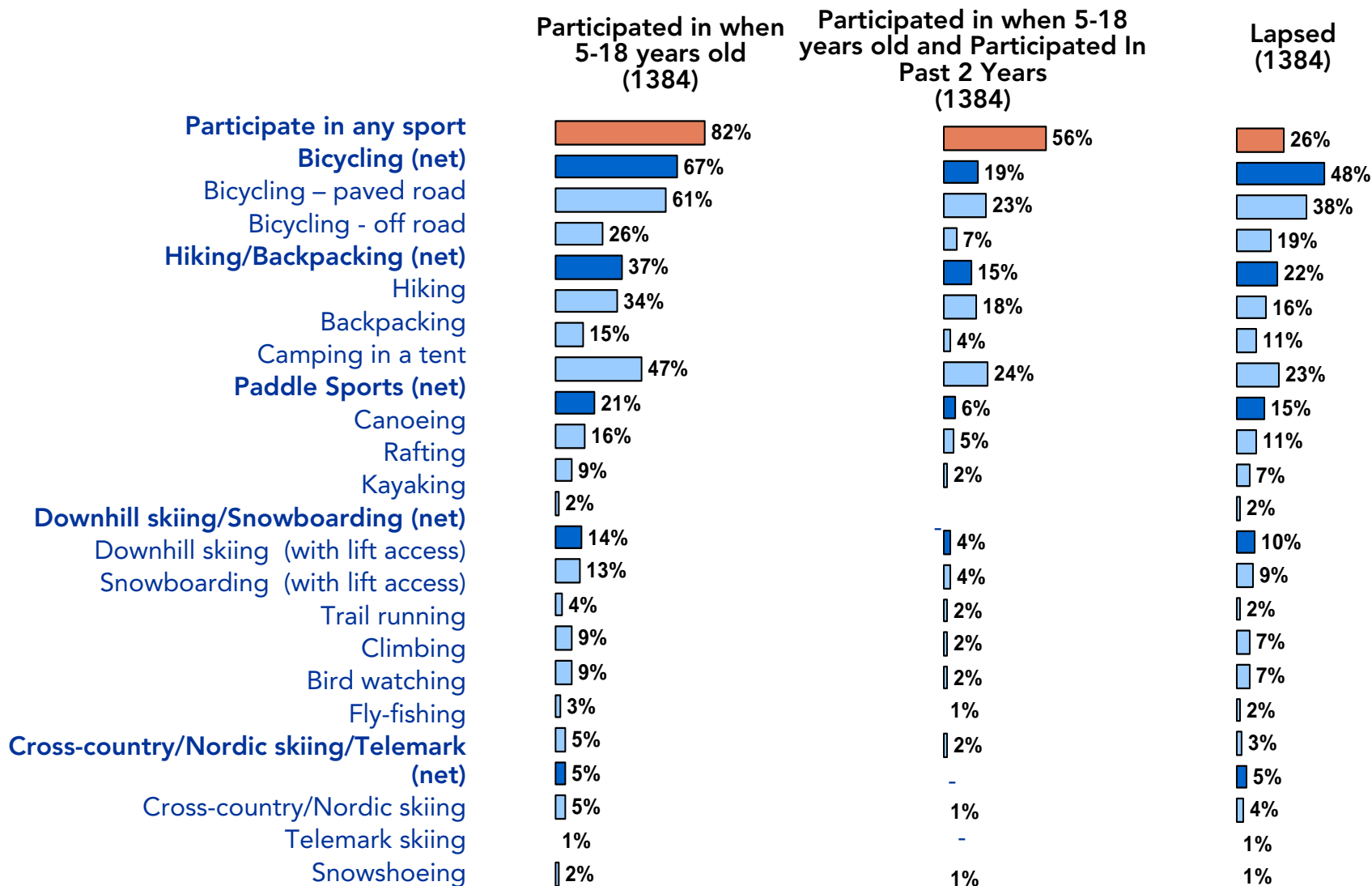


Lapsed Activities - Among General Population, Age 16-24 Years Old



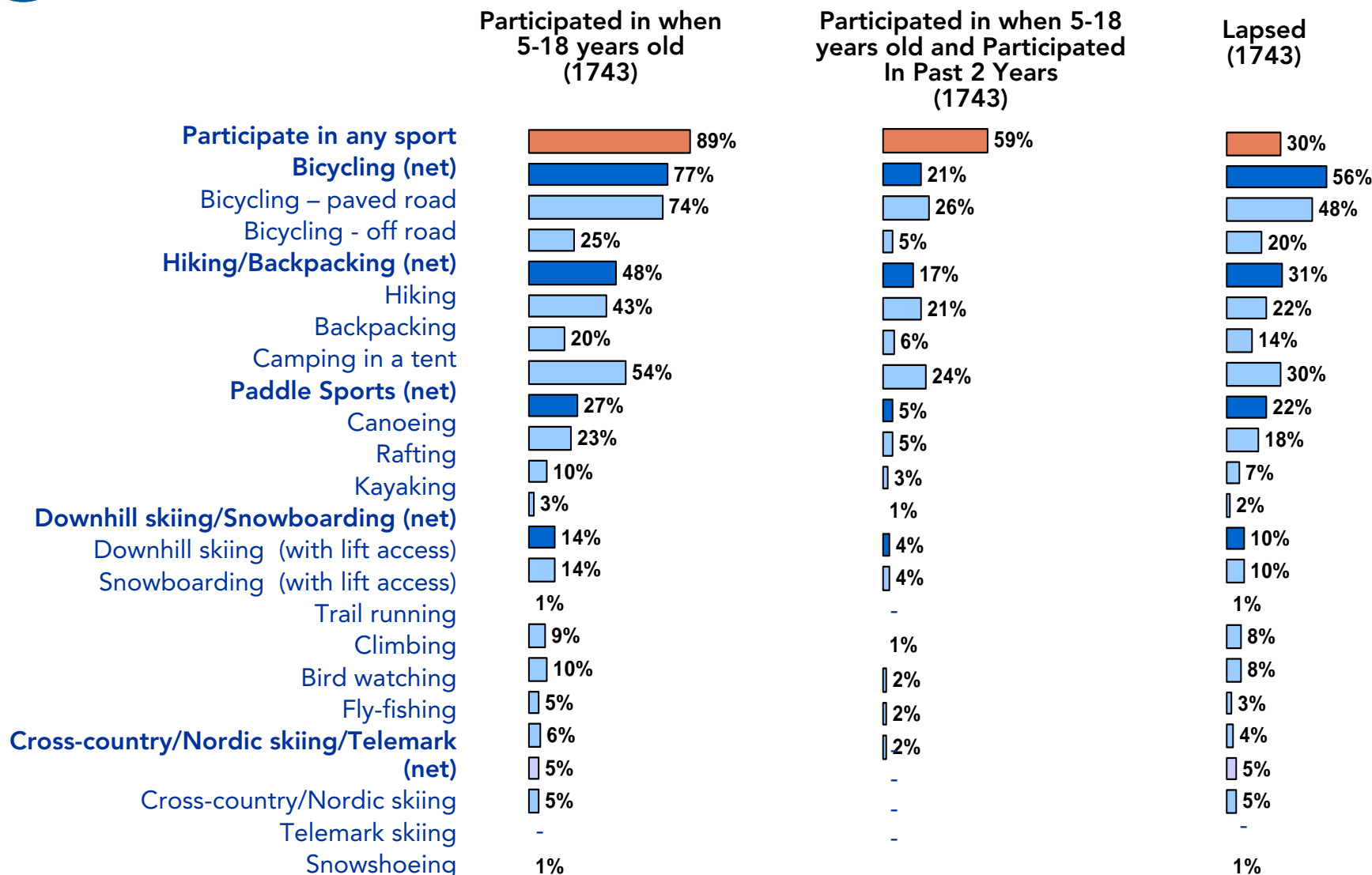


Lapsed Activities - Among General Population, Age 25-34 Years Old

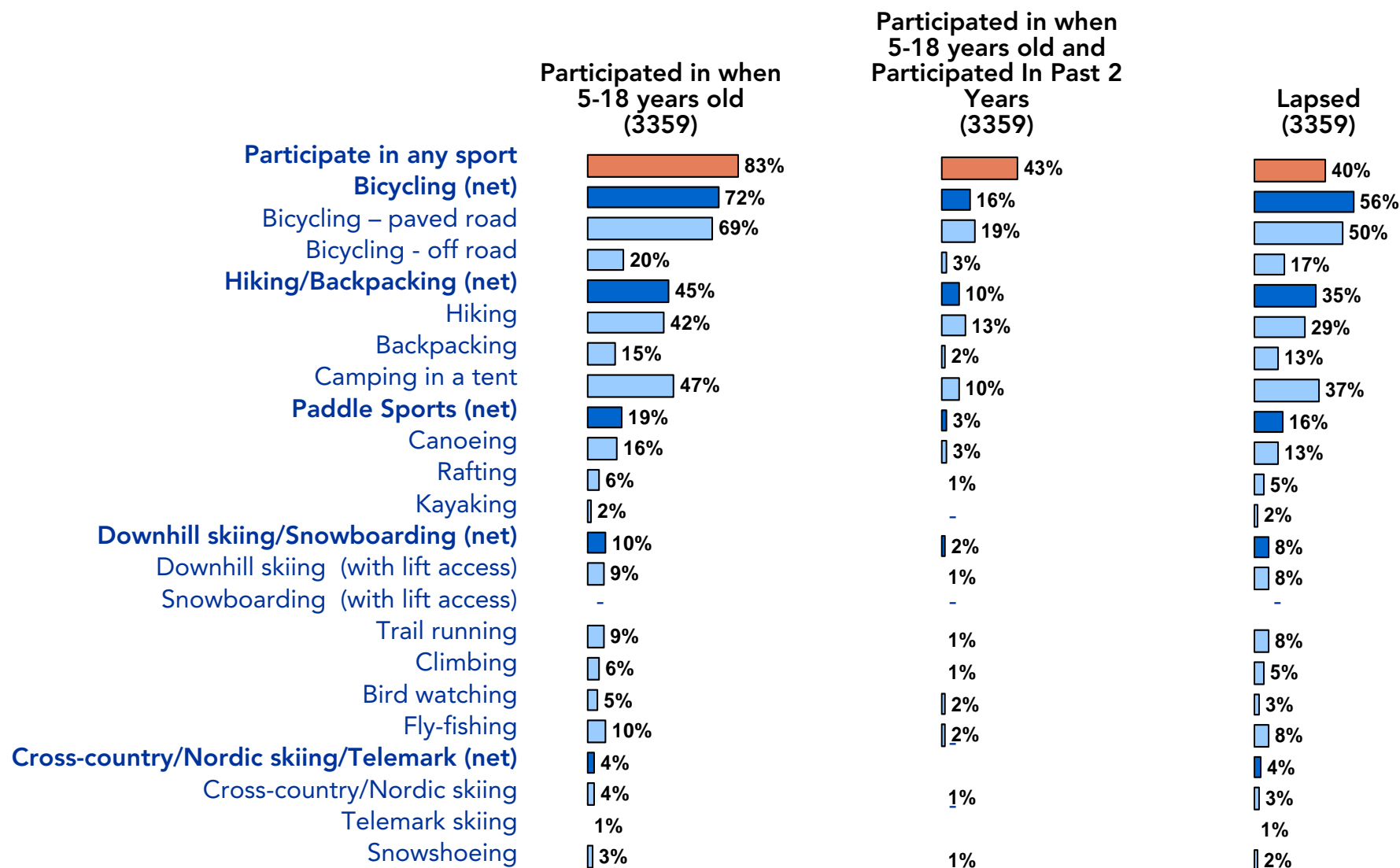




Lapsed Activities - Among General Population, Age 35-44 Years Old



Lapsed Activities - Among General Population, Age 45+ Years Old



Reasons For Stopping Activity*

	General Population				
	Total (5660) %	Age 16-24 (708) %	Age 25-34 (977) %	Age 35-44 (1339) %	Age 45+ (2628) %
Time Commitments (net)	43	53	57	55	30
Job	22	26	30	28	16
Time commitments with children	18	4	35	33	10
Time commitments for home improvement/ repair/maintenance	14	6	13	19	14
Time commitments for school	8	38	9	4	1
Time commitments for elder care	3	-	2	3	4
Lack of necessary gear/equipment	22	24	31	23	18
Poor physical shape or health	20	6	13	15	28
Don't enjoy the activity anymore	19	18	14	15	24
I now participate in other sports/activities	19	21	15	19	20
Don't know anyone to do it with	16	21	19	14	15
Gained weight	15	6	15	16	16
Injury	11	6	7	10	13
Moved/no longer have access to activity	11	14	13	11	8
Gear/apparel for activity is too expensive	8	12	14	9	5
Volunteer organizations	3	4	2	2	4
It seems too dangerous or extreme	5	2	3	3	7
Access/entrance fees are too expensive	4	4	5	5	3
Still participate when I can (volunteered)	1	1	-	-	1
Other time commitments (volunteered)	1	1	1	1	1
Other	7	4	8	7	7

*Among those who lapsed for any activity



Top Challenges Getting People To Participate in Outdoor Activities

	Participants				
	Total (2054) %	Age 16-24 (498) %	Age 25-34 (380) %	Age 35-44 (397) %	Age 45+ (779) %
Adults don't have enough time or are too busy	60	50	64	64	61
Costs associated with gear and equipment	39	42	48	37	34
Disinterest among adults/parents	33	24	27	34	40
Lack of knowledge about how to get started/ what to do/where to go	30	34	28	29	29
Lack of nearby parks or areas to recreate	24	30	27	22	20
Concerns about safety while participating in the activity	18	15	15	19	20
Costs associated with access/entry/club fees	16	21	18	16	12
Disinterest among children	15	18	8	13	17
Involvement in team sports/other activities (soccer, basketball, dance, etc.)	14	13	9	18	15
Children don't have enough time	8	8	6	11	6
Traffic/parking concerns	5	4	4	6	6
Other	3	3	4	3	2
Not enough time	1	-	-	1	1
None	6	6	6	5	7



Opportunities Moving Forward

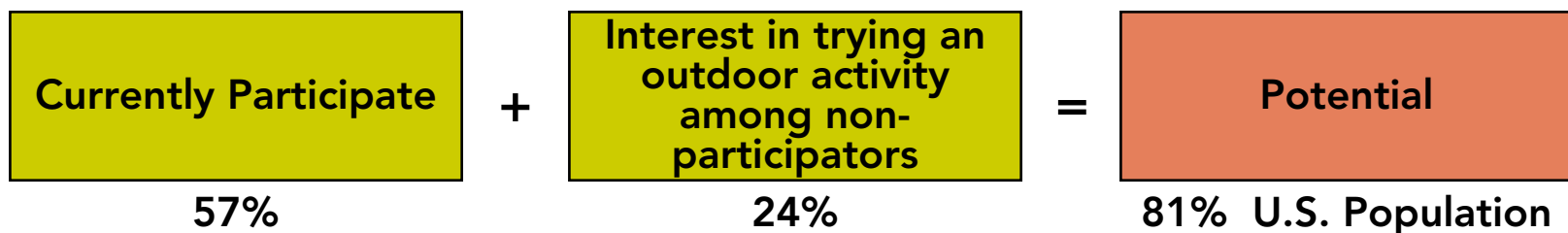


Participation Interest Summary

There are basically two ways to maintain or increase participation in human powered outdoor activities:

1. Sustain or increase frequency of participation among current participants.
2. Attract new/regain lapsed participants.

There is an opportunity to take advantage of interest in trying a human powered outdoor activity:



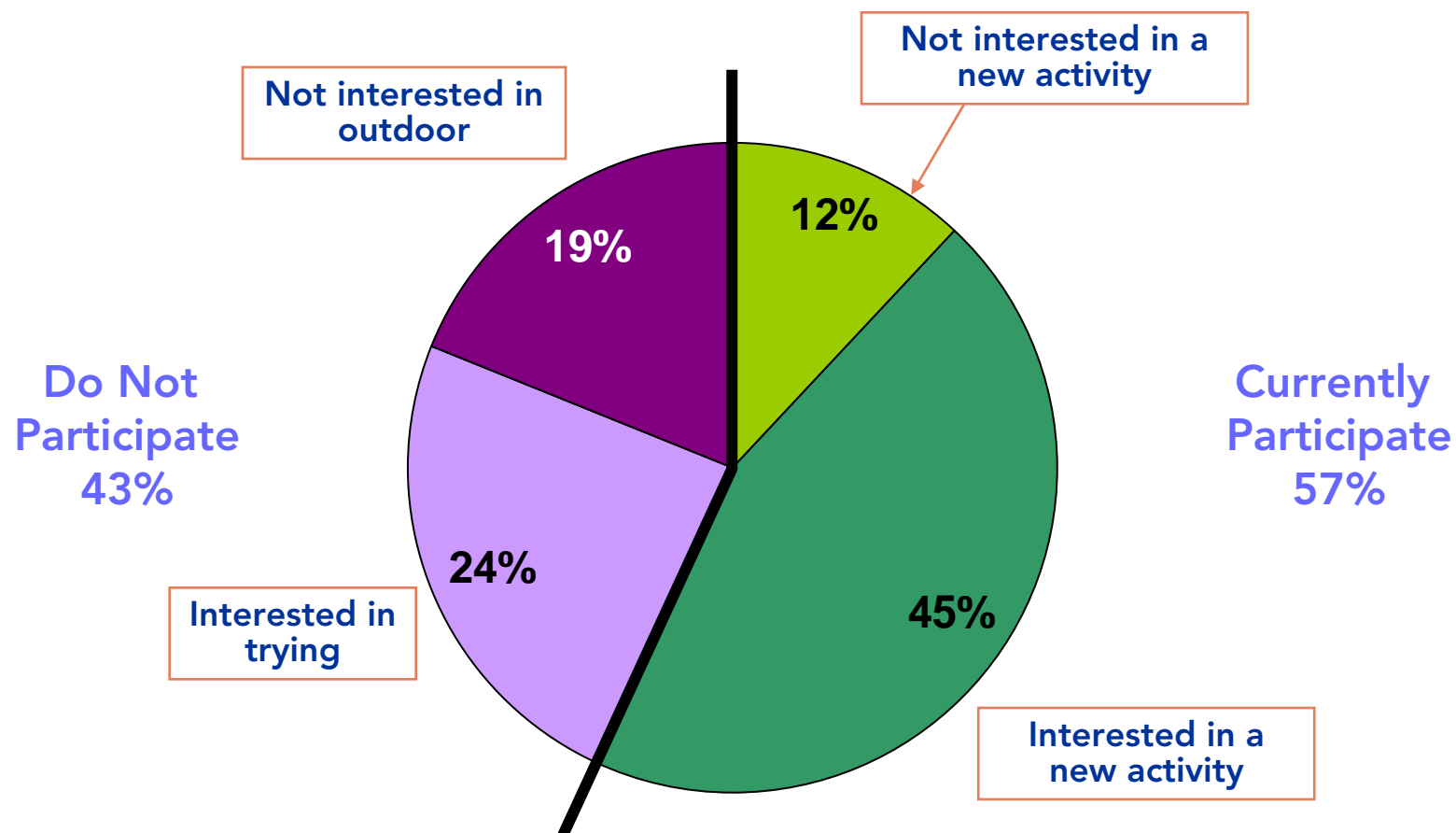
- The activities that stand to gain the most in participation are the same activities that are most popular – biking, hiking, and camping.

In addition, even among current participants, most are interested in new activities.

- 45% of U.S. population is interested in trying new activities in addition to their current activities.



Participation*

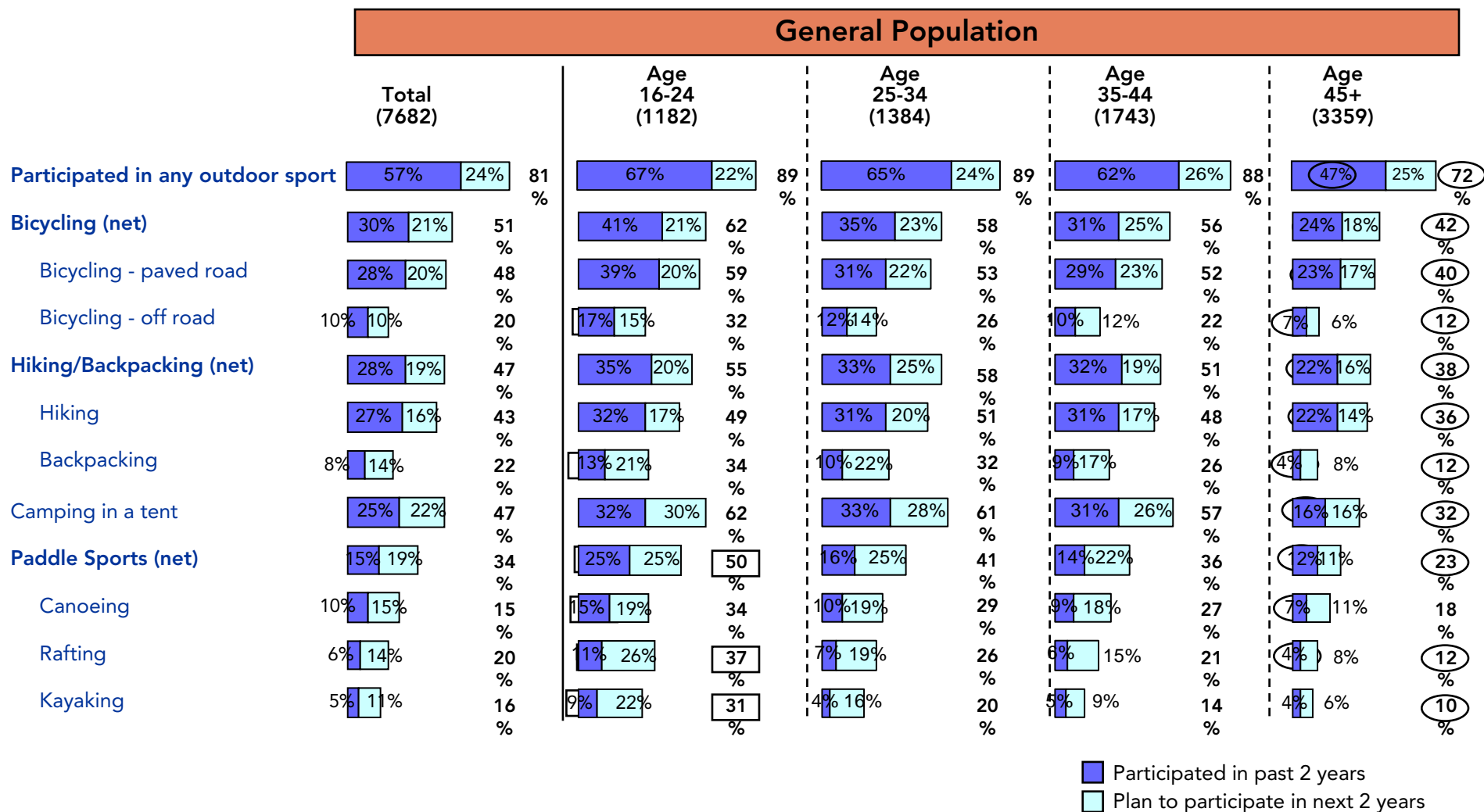


Human Powered Outdoor Activities Potential: 81%

*Base: General Population

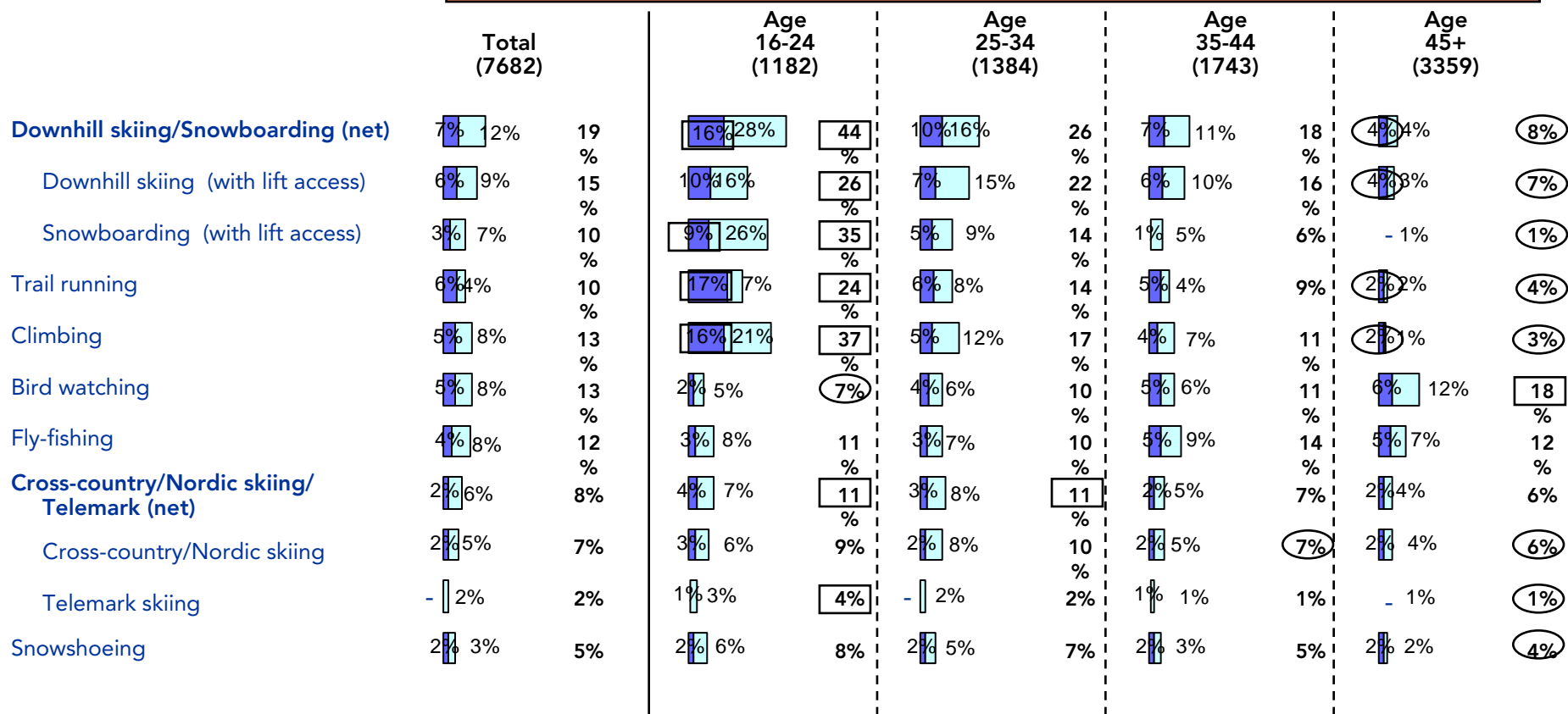




Total Participation



Total Participation (Continued)

General Population



 Participated in past 2 years
 Plan to participate in next 2 years

Lifecycle Summary

Understanding the lifecycle of outdoor activities is essential to identifying the key areas of opportunity.

Outdoor activities are typically started at a young age and then at some point in their mid-twenties, their lifestyle becomes too busy and they have to stop for a period of time. Most start again because they miss the activity, however, a significant portion never start again.

- 90% of participants started an outdoor activity between the ages of 5 and 18.
- Biking and camping appear to have the greatest longevity.
 - Bikers have been biking for almost 29 years.
- Age 25-44, single, couples, or with kids, participate in outdoor activities less overall than any other age groups.
- 16-24 year olds participate in outdoor activities most often among the age groups.



Lifecycle Summary

Since once participants begin participating in an outdoor activity, there is a high probability that they will continue to participate in at least one outdoor activity, it will be most beneficial to attract new participants at a young age. "People you know" is the biggest influencer in attracting new participants to an outdoor activity.

- Parents/guardians/family members is the number one influencer mentioned (41%).
- Followed by friends and peers who are already active in the activity (33%) or who want to try the activity (31%).

Actions considered most effective in encouraging people to experience outdoor activities:

Among Youth

Turn off the TV
Affordable gear and equipment
Organized school
programs/clubs/athletics
Parent organized activities
Boy Scouts
Greater number of parks
Closer location/easier access

Among Adults

Turn off the TV
Affordable gear and equipment
Organized work/employer-sponsored
activities
Greater number of parks
Closer location/easier access

The key attitudes that correlated with increase in frequency revolve around:

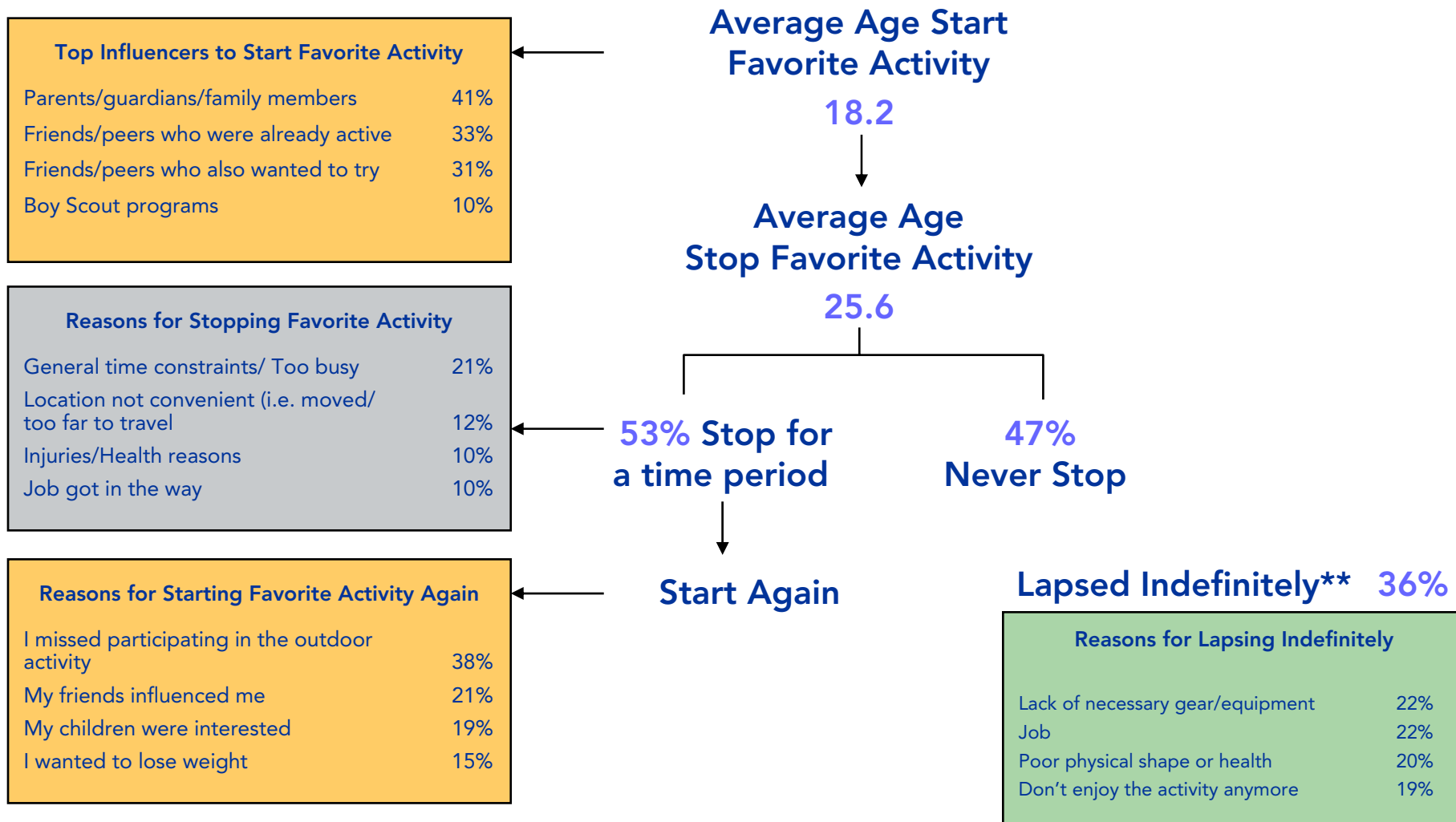
- Ingrained behavior – have always done it
- Exercise
- The challenge
- Having time to participate
- Enjoying the outdoors

Older age groups have a job and more disposable income and therefore tend to spend more on outdoor activities than the younger (16-24 year olds). The key attitudes that correlate with increase in spending revolve around:

- Participation in extreme activities
- Outdoor enjoyment
- Ingrained behavior
- Exercise

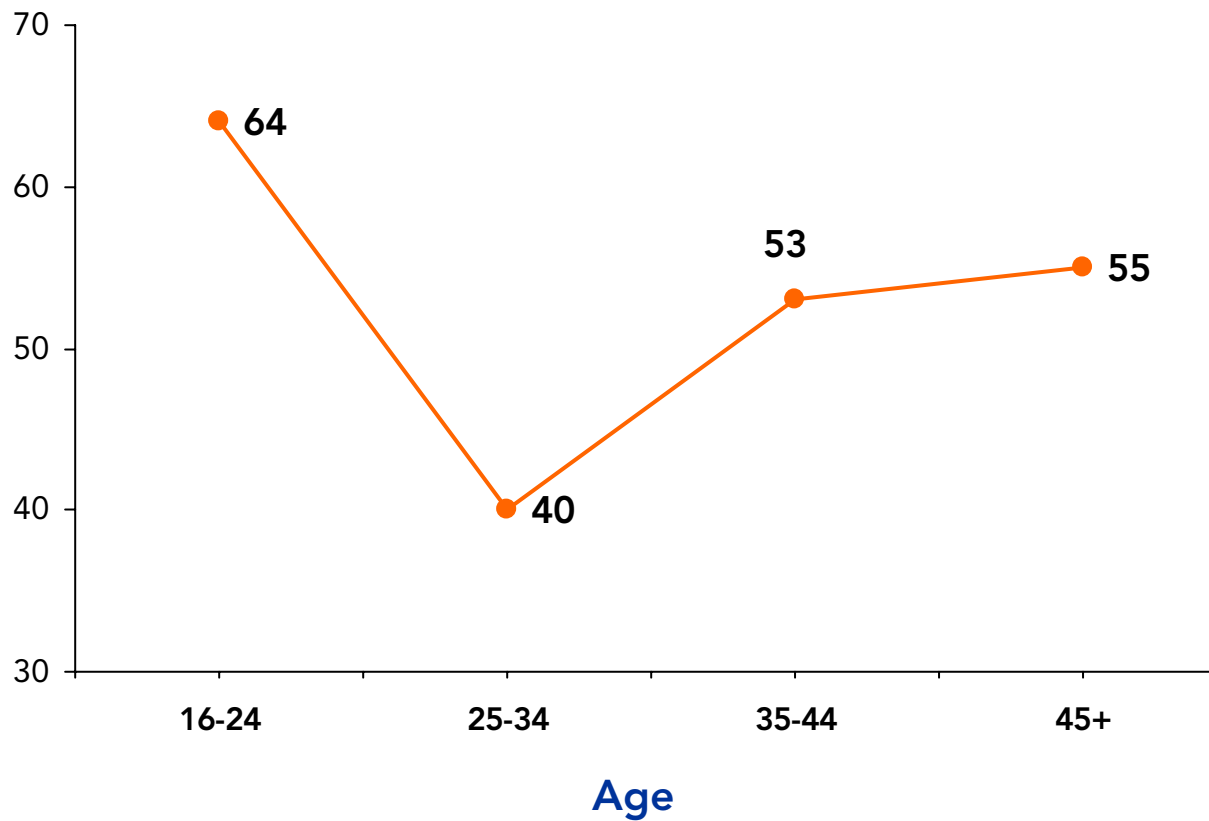


Lifecycle



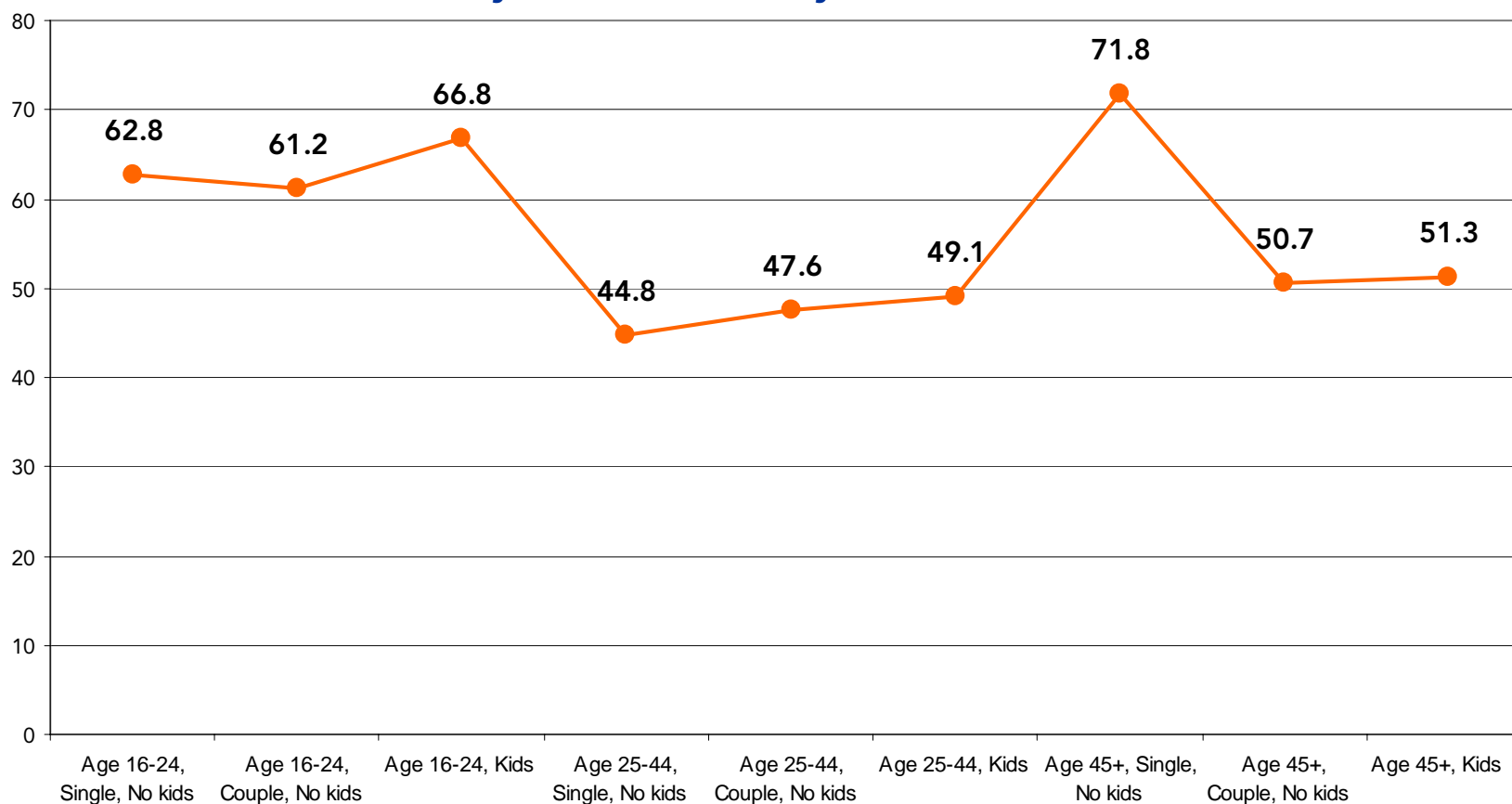
** Based on ever participating in a sport

Average Number of Times Participated in Any Outdoor Activity in Past 2 Years



Lifecycle

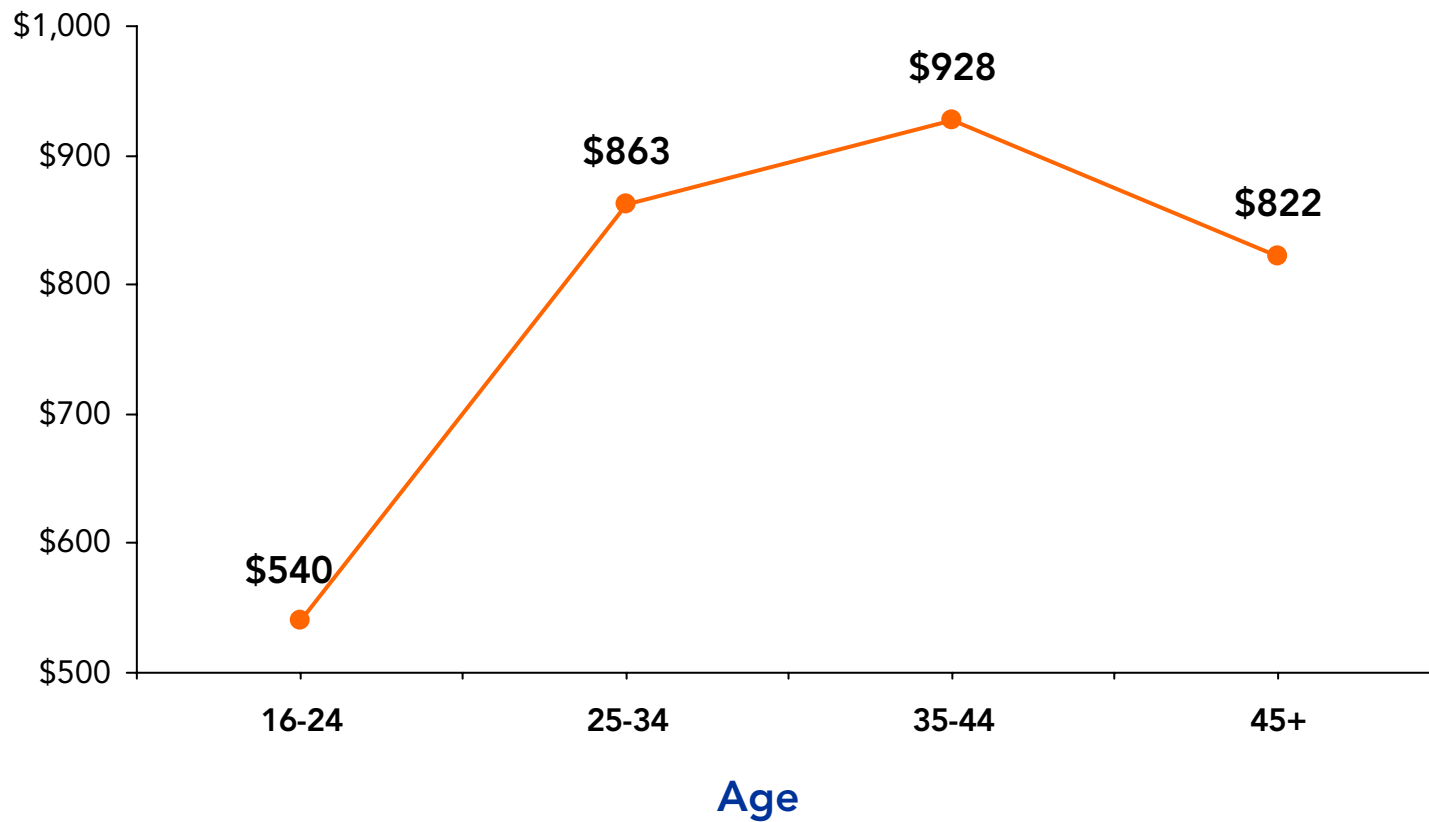
**Average Number of Times Participated
in Any Outdoor Activity in Past 2 Years**



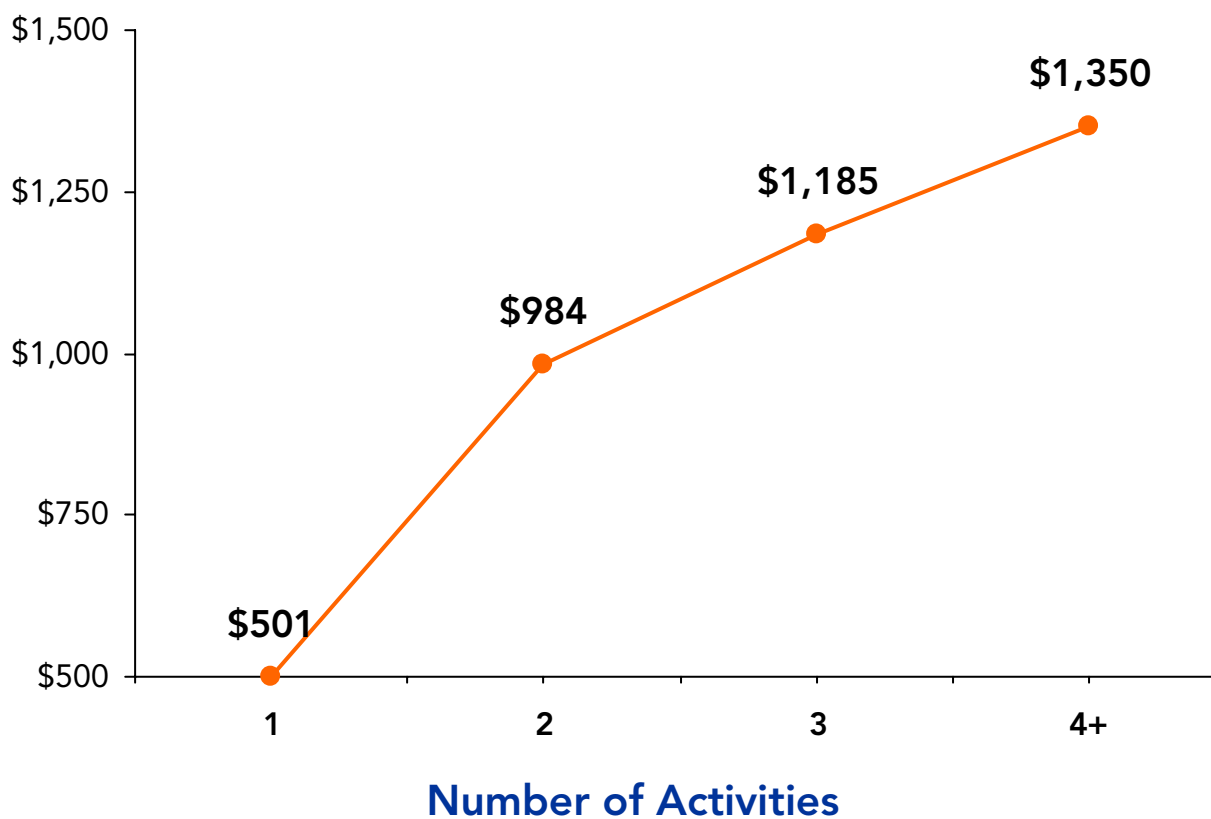
Lifestage



Average Amount Spend on Outdoor Activities



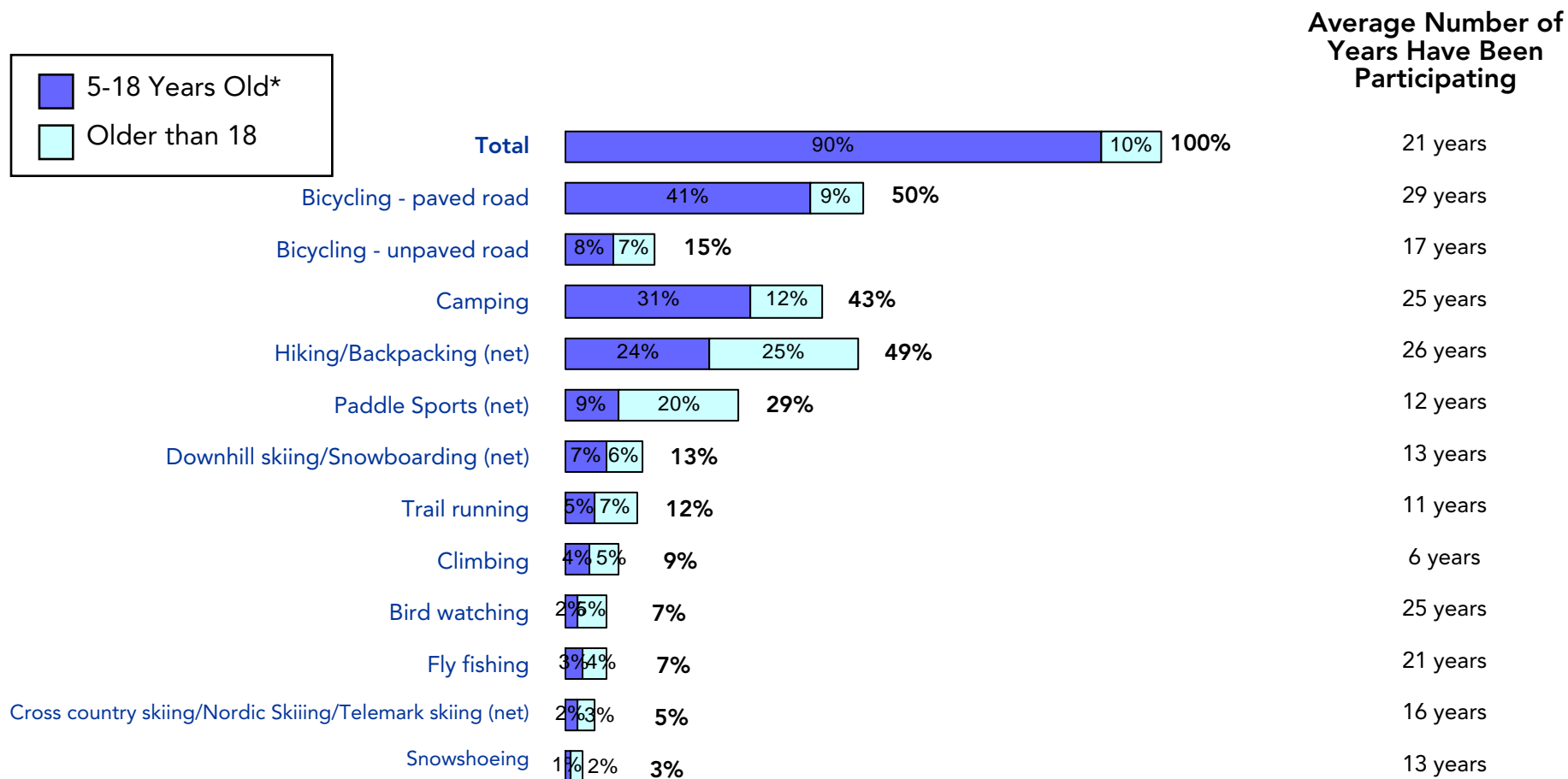
Spending By Number of Activities Participate In





**OUTDOOR
INDUSTRY**
FOUNDATION

When Started Activity – Among Participants



*Participated 5-18 and currently participate



Favorite Activity Among Participants

Reasons for Starting

	%
Parents/Guardians/Family members	41
Friends/peers who were already active in it	33
Friends/peers who also wanted to try it	31
Boy Scouts programs, camps	10
Church group or other religious organization	8
School-related clubs/athletics	6
Girl Scouts programs, camps	6
Books	6
Media – newspaper, magazine, Internet, etc.	5
Personal Interest (Volunteered)	4
Camps not affiliated with organizations such as Scouts, YMCA	3
Movies	3
YMCA/YWCA programs, camps	2
Boys & Girls Clubs programs, camps	2
Camp Fire programs, camps	2
Community organization/club not affiliated with school –Rainbow Girls, Mountaineering clubs, etc.	2
Retailer-sponsored events, such as a local sporting good store clinic or race	2
Local Gym, gym-sponsored events or programs, including indoor climbing center	2
Outdoor educational programs such as Outward Bound	1
A sports icon	1
Other	6
Nothing (Volunteered)	3

Reasons for Stopping

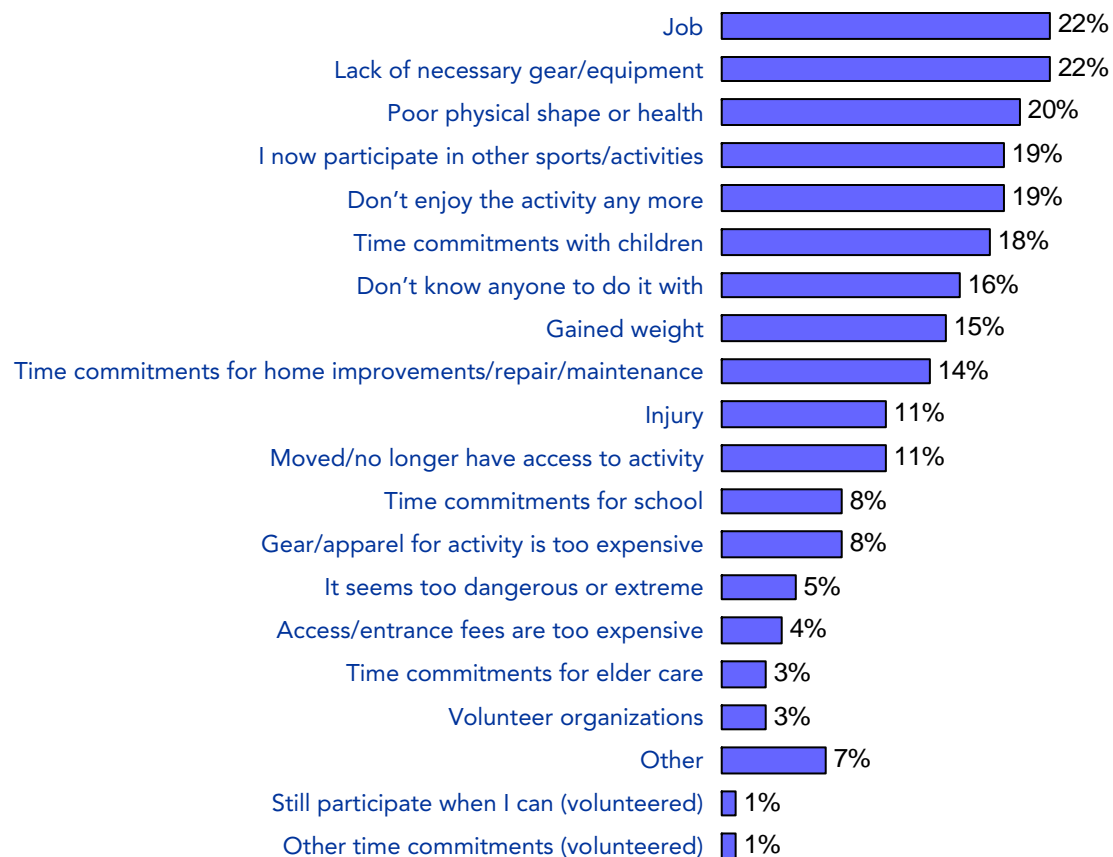
	%
General time constraints/Too busy	21
Location not convenient (i.e. moved/ too far to travel)	12
Job got in the way	10
Injuries/Health reasons	10
School commitments	8
Lost interest/desire	7
Pregnancy/birth of a child	6
Family commitments	6
Do not have the equipment	5
Money issues	4
Got married	4
Entered the military	4
Got a drivers license/vehicle	4
Participated in other activities instead	4
Could not find anyone to do activity with	3
No opportunity	1
Age/Felt too old	1
Other	11
No reason for stopping	1
Not sure	1

Reasons for Starting Again

	%
I missed participating in the outdoor activity	38
My friends influenced me	21
My child(ren) was interested	19
I wanted to lose weight	15
I lost weight/Improved physical shape	11
My spouse/Family Member (Volunteered)	7
I retired from working full time	4
I now have more money to invest in it	4
Doctor's recommendation	3
Church club/activity	3
Other social club/activity	3
My parents/guardians influenced me	3
Boy Scouts	3
Camp Fire	2
Between jobs	2
School club/activity	1
Girl Scouts	1
My parents/guardians forced me to	-
Boys and Girls Club	-
Other	20
No influences (Volunteered)	2



Reasons for Stopping an Activity Indefinitely*



*Among those who lapsed for any activity





Actions Considered Effective in Encouraging Youth to Experience Outdoor Activities

	Participants					
	Total (2054)	Age 16-24 (498)	Age 25-34 (380)	Age 35-44 (397)	Age 45+ (779)	Have Children (897)
	%	%	%	%	%	%
Just turning off the TV	55	55	58	57	53	54
Organized school programs/clubs/athletics	51	50	55	47	52	50
Affordable gear and equipment	48	48	54	48	45	50
Parent-organized activities	45	33	53	51	46	43
Boy Scouts sponsored programs	41	36	41	43	44	38
Greater number of local parks/nearby recreation areas	38	42	42	37	34	38
Closer access to outdoor areas	38	48	40	31	34	37
YMCA/YWCA sponsored programs	37	30	39	36	40	32
Boys & Girls Clubs sponsored programs	35	28	45	32	36	31
Organized religious or church groups	34	31	33	32	38	34
Girl Scouts sponsored programs	34	27	36	33	37	30
More free time for children	29	35	31	28	23	34
Local clubs such as a cycling association or hiking club	27	23	30	22	32	24
Programs sponsored by outdoor-oriented retail stores	22	22	30	19	20	22
Camp Fire sponsored programs	22	16	23	26	23	21
Programs sponsored by fitness gyms/climbing gyms	21	22	25	17	20	20
Organized work/employer-sponsored programs	19	16	21	21	19	20
Local service organizations not affiliated with any of the listed organizations, such as Rainbow Girls or Jr. League	15	16	20	12	14	15
Other	2	1	2	2	3	2



Activities or Actions Effective at Encouraging Adults to Participate

	Participants				
	Total (2054)	Age 16-24 (498)	Age 25-34 (380)	Age 35-44 (397)	Age 45+ (779)
	%	%	%	%	%
Just turning off the TV	60	57	60	58	62
Affordable gear and equipment	53	61	55	54	44
Organized work/employer-sponsored programs	46	49	48	43	46
Closer access to outdoor areas	41	46	44	40	38
Greater number of local parks/nearby recreation areas	40	44	40	39	39
Organized religious or church groups	32	33	28	30	34
Local clubs such as a cycling association or hiking club	28	27	26	28	29
Programs sponsored by fitness gyms/climbing gyms	28	34	33	25	22
Programs sponsored by outdoor-oriented retail stores	24	23	26	28	21
YMCA/YWCA sponsored programs	19	16	18	21	20
Organized school programs/clubs/athletics	15	15	21	15	12
Local service organizations not affiliated with any of the listed organizations, such as Rainbow Girls or Jr. League	9	7	12	7	11
Other	5	3	5	7	5





Activity Summary



Activity Summary

Overall, participants in human powered outdoor activities span age, gender and geographic areas, however, individual activities may skew along key demographics.

- Bicycling off road, fly fishing and climbing skew male, especially fly fishing.
- Generally, participants of the more physically challenging activities – bicycling off road, camping, paddle sports, trail running, climbing, and snowboarding/skiing – skew younger, especially trail running and climbing.
- Participants of cross-country/Nordic/Telemark skiing, paddle sports, snowshoeing, and downhill skiing have higher household incomes.
- Participants of hiking, cross-country/Nordic/Telemark skiing, fly fishing, camping, and snowboarding/downhill skiing are more likely to reside in the West.
 - Snowshoers are more likely to be located in the East or West.

Activity Summary

There is a fair amount of cross-participation among human powered outdoor activities.

- Participants of showshoeing, cross-country/Nordic/Telemark skiing participate in over 6 outdoor activities.
- Hiking, bicycling (paved road) and camping are the activities that are most often combined with other activities.
 - The majority of participants of birdwatching also hike (66%).
 - Participants of cross-country/Nordic/Telemark skiing also bicycle (71%), hike (71%) and camp (59%).
 - Participants of paddle sports also hike (61%) and camp (54%).
 - Participants of trail running also bike (73%), hike (72%) and camp (55%).
 - Participants of climbing also bike (73%), hike (70%, and camp (55%).
 - Participants of snowshoeing also bike (62%), hike (82%) and camp (59%).
 - Participants of snowboarding/downhill skiing also bike (60%), hike (62%) and camp (54%).

Activity Summary

Data was collected regarding respondents' spending on all human powered activities combined. The more activities a person participates in, the more money an individual spends. With that in mind, participants of fly fishing, cross-country/Nordic/telemark skiing and bicycling off road spend the most money on outdoor activities.

- Hiking, bicycling and camping are the most popular outdoor activities among single activity participants, driving down spending among this group.

Outdoor specialty stores are more popular with participants of the more challenging or equipment-intensive activities.

- Participants of bicycling off road, cross-country/Nordic/telemark skiing, paddle sports, trail running, snowshoeing and snowboarding/downhill skiing frequent outdoor specialty stores.
- Snowshoeing, snowboarding/downhill skiing and fly fishing participants are more likely to mention outdoor specialty shops as the place they shop most often.

Activity Summary

Participants							
	Total (2054) %	Hiking/ Back-packing (1129) %	Bicycling paved road (1020) %	Bicycling – off road (371) %	Bird watching (218) %	X- country/Nordic/ Telemark skiing (170) %	Fly fishing (185) %
Gender							
Male	52	53	55	64	49	60	80
Female	48	47	45	36	51	40	20
Race							
White	76	79	74	76	74	84	82
Age							
16-24	24	24	28	40	10	25	13
25-34	19	18	16	16	13	17	14
35-44	19	24	22	18	20	20	26
45+	38	34	34	26	57	38	47
Average age	38.8 yrs.	38.3 yrs.	37.5 yrs.	33.5 yrs.	47.1 yrs.	39.0 yrs.	43.6 yrs.
Married/living with partner	55	53	55	46	60	57	67
Average number of adults in household	2.3	2.3	2.4	2.7	2.1	2.3	2.2
Households with children	47	46	50	50	40	43	43
Average age of children	10.2	10.6	10.6	11.1	10.2	10.3	9.3
Employed	64	65	63	59	54	65	73
Education							
High school graduate or less	37	31	37	39	28	30	34
Completed some college/college graduate	53	56	52	51	57	47	54
Attended graduate school	10	13	11	10	15	23	12
Median income	\$57,800	\$61,500	\$63,200	\$59,300	\$50,80	\$71,000	\$71,400

Activity Summary

	Participants						
	Total (2054) %	Camping (940) %	Paddle sports (649) %	Trail running (246) %	Climbing (233) %	Snowshoeing (151) %	Snowboarding /Downhill skiing (354) %
Gender							
Male	52	52	53	60	63	59	63
Female	48	48	47	40	37	41	37
Race							
White	76	78	78	65	73	85	79
Age							
16-24	24	27	31	52	60	12	40
25-34	19	21	18	12	14	17	18
35-44	19	25	20	20	16	23	18
45+	38	27	31	16	10	48	24
Average age	38.8 yrs	35.4 yrs	35.7 yrs.	30.2 yrs.	26.8 yrs.	42.5 yrs.	32.4 yrs.
Married/living with partner	55	53	51	33	33	58	47
Average number of adults in household	2.3	2.3	2.3	2.4	2.3	2.0	2.3
Households with children	47	51	50	58	56	35	51
Average age of children	10.2	10.3	10.3	10.5	11.7	10.4	10.5
Employed	64	64	65	49	58	74	65
Education							
High school graduate or less	37	41	35	43	52	16	32
Completed some college/college graduate	53	52	54	46	40	48	52
Attended graduate school	10	7	11	11	8	36	16
Median income	\$57,800	\$47,400	\$68,600	\$65,500	\$61,000	\$60,000	\$76,200

Activity Summary

Participants							
	Total (2054) %	Hiking/ Back-packing (1129) %	Bicycling paved road (1020) %	Bicycling – off road (371) %	Bird watching (218) %	X- country/Nordic/ Telemark skiing (170) %	Fly fishing (185) %
Where Live							
Urban	27	25	28	32	25	29	18
Suburban	33	34	35	31	34	34	31
Small town	25	23	23	25	23	23	33
Rural	15	18	14	12	18	14	18
Regions							
East	21	21	20	19	23	23	15
South	27	25	28	24	28	11	26
Midwest	26	25	29	31	27	29	24
West	22	29	23	26	19	34	35

Activity Summary

Participants							
	Total (2054) %	Camping (940) %	Paddle sports (649) %	Trail running (246) %	Climbing (233) %	Snowshoeing (151) %	Snowboarding /Downhill skiing (354) %
Where Live							
Urban	27	25	23	36	25	23	30
Suburban	33	29	37	34	40	22	35
Small town	25	29	26	18	26	29	25
Rural	15	17	14	12	9	26	10
Regions							
East	21	18	27	22	26	34	23
South	27	24	26	28	27	8	22
Midwest	26	25	26	27	19	19	18
West	22	33	21	23	28	39	37

Past 2 Year Participation

Cross Participation

	Participants					
	Hiking/ Back-packing (1129) %	Bicycling paved road (1020) %	Bicycling – off road (371) %	Bird watching (218) %	X- country/Nordic/ Telemark skiing (170) %	Fly fishing (185) %
Bicycling (net)	51	100	100	46	71	40
Bicycling - paved road	49	100	83	45	70	38
Bicycling - off road	21	25	100	20	35	19
Hiking/Backpacking (net)	100	47	68	67	74	51
Hiking	96	46	65	66	71	45
Backpacking	27	15	30	24	32	24
Camping in a tent	51	38	49	47	59	49
Paddle Sports (net)	36	27	44	40	60	36
Canoeing	22	18	29	29	40	24
Rafting	15	11	22	12	27	16
Kayaking	12	9	15	14	27	9
Downhill skiing/Snowboarding (net)	17	15	24	10	41	21
Downhill skiing (with lift access)	14	13	19	8	39	19
Snowboarding (with lift access)	5	5	11	5	15	5
Trail running	17	16	34	15	31	11
Climbing	14	13	22	9	28	14
Bird watching	9	6	9	100	11	10
Fly-fishing	7	5	8	10	18	100
Cross-country/Nordic skiing/ Telemark (net)	7	7	11	8	100	13
Cross-country/Nordic skiing	7	7	11	8	94	12
Telemark skiing	2	1	4	3	18	4
Snowshoeing	5	3	6	8	23	9
Average number of activities participate in	3.7	3.3	5.2	4.2	6.4	4.1



Past 2 Year Participation

Cross Participation (continued)

	Participants					
	Camping (940) %	Paddle sports (649) %	Trail running (246) %	Climbing (233) %	Snowshoeing (151) %	Snowboarding /Downhill skiing (354) %
Bicycling (net)	45	50	73	73	62	60
Bicycling - paved road	43	47	71	71	59	57
Bicycling - off road	17	23	45	36	30	28
Hiking/Backpacking (net)	57	61	72	72	85	62
Hiking	54	58	70	70	82	56
Backpacking	24	23	35	40	43	27
Camping in a tent	100	54	55	55	59	54
Paddle Sports (net)	36	100	47	47	59	46
Canoeing	25	60	30	31	45	27
Rafting	15	39	28	28	23	24
Kayaking	11	31	13	24	30	22
Downhill skiing/Snowboarding (net)	16	21	30	35	39	100
Downhill skiing (with lift access)	13	17	23	24	36	80
Snowboarding (with lift access)	6	8	15	21	16	33
Trail running	15	19	100	32	27	27
Climbing	12	15	26	100	22	25
Bird watching	7	9	9	6	18	5
Fly-fishing	7	8	6	10	23	11
Cross-country/Nordic skiing/ Telemark (net)	7	10	13	14	40	15
Cross-country/Nordic skiing	6	10	13	14	40	14
Telemark skiing	2	2	4	5	9	5
Snowshoeing	4	6	7	7	100	9
Average number of activities participate in	3.6	4.3	5.5	5.7	6.6	5.0



Past 2 Year Participation* Cross Participation

	Participants						
	Total (994) %	Bicycling paved road (194) %	Bicycling – off road (34) %	Hiking/ Backpacking (net) (203) %	Camping (180) %	Paddle sports (net) (117) %	Snowboarding /Downhill skiing (net) (40) %
Bicycling - paved road	20	-	280	165	160	85	150
Bicycling - off road	3	333	-	133	66	100	100
Hiking/Backpacking (net)	20	170	110	-	165	145	35
Camping in a tent	18	161	56	161	-	166	88
Paddle Sports (net)	12	83	75	142	166	-	150
Downhill skiing/Snowboarding (net)	4	150	100	17	100	150	-

*Among those that participate in 2 activities
Note: Activities with small base size are not shown



Number of Times Participate in Outdoor Activities in Past 2 Years*

Human Powered Outdoor Activity Participation Summary (continued)

	Participants						
	Total	Hiking/ Back-packing	Bicycling paved road	Bicycling – off road	Bird watching	X- country/Nordic/ Telemark skiing	Fly fishing
Overall	54.4	74.4	87.4	127.4	105.4	118.2	57.0
Bicycling (net)	52.3	58.3	53.9	82.0	52.2	71.2	55.7
Bicycling - paved road	46.2	48.6	46.2	63.7	44.4	60.5	42.1
Bicycling - off road	29.0	28.8	30.7	29.0	18.6	23.3	32.9
Hiking/Backpacking (net)	22.6	22.6	28.8	27.4	49.7	29.1	20.4
Hiking	21.5	21.5	27.3	26.0	47.3	25.8	19.2
Backpacking	7.2	7.2	7.7	5.8	9.6	9.7	7.2
Camping in a tent	5.8	7.3	7.1	7.8	6.9	9.4	7.5
Paddle Sports (net)	5.6	6.3	7.1	8.3	7.9	13.9	7.9
Canoeing	4.7	5.4	5.9	6.9	4.9	12.1	6.6
Rafting	2.7	2.9	2.9	3.3	**	3.3	4.6
Kayaking	5.5	5.0	5.9	6.0	9.9	9.9	**
Downhill skiing/Snowboarding (net)	10.7	12.0	11.9	12.7	**	14.9	11.1
Downhill skiing (with lift access)	9.6	10.9	10.3	11.7	**	13.3	11.5
Snowboarding (with lift access)	9.2	8.9	9.3	7.1	**	**	**
Trail running	63.3	56.7	60.5	31.8	**	29.2	**
Climbing	7.6	8.3	6.9	8.0	**	9.8	5.3
Bird watching	19.6	17.6	22.7	9.1	19.6	**	**
Fly-fishing	9.0	8.3	11.0	12.8	**	**	9.0
Cross-country/Nordic skiing/ Telemark (net)	9.1	9.5	10.0	11.2	**	9.1	**
Cross-country/Nordic skiing	8.5	9.1	9.2	9.9	**	8.5	**
Telemark skiing	**	**	**	**	**	**	**
Snowshoeing	6.7	6.7	7.6	**	**	7.5	**

*Mean

**Not shown due to small base size





Number of Times Participate in Outdoor Activities in Past 2 Years*

Human Powered Outdoor Activity Participation Summary (continued)

	Participants						
	Total	Camping	Paddle sports	Trail running	Climbing	Snowshoeing	Snowboarding /Downhill skiing
Overall	54.4	61.2	58.3	155.0	120.6	119.6	88.9
Bicycling (net)	52.3	57.6	47.5	63.3	63.9	55.1	74.1
Bicycling - paved road	46.2	48.7	41.2	51.2	52.7	48.2	58.0
Bicycling - off road	29.0	29.6	18.7	22.7	24.9	18.7	39.5
Hiking/Backpacking (net)	22.6	25.1	17.3	38.4	40.7	37.4	20.0
Hiking	21.5	23.5	15.6	36.2	35.9	34.8	19.5
Backpacking	7.2	6.6	6.5	6.9	10.9	7.5	5.4
Camping in a tent	5.8	5.8	6.8	8.7	8.8	9.4	7.3
Paddle Sports (net)	5.6	6.3	5.6	6.4	9.1	13.3	7.1
Canoeing	4.7	4.9	4.7	4.7	5.4	8.8	4.7
Rafting	2.7	2.7	2.7	2.8	3.7	3.1	3.9
Kayaking	5.5	5.6	5.5	6.3	6.7	10.5	5.0
Downhill skiing/Snowboarding (net)	10.7	11.7	12.4	12.8	15.8	22.8	10.7
Downhill skiing (with lift access)	9.6	10.2	11.2	10.5	13.2	18.9	9.6
Snowboarding (with lift access)	9.2	9.9	8.3	9.6	11.4	11.9	9.2
Trail running	63.3	48.8	34.3	63.3	57.5	37.3	32.4
Climbing	7.6	9.0	9.9	8.3	7.6	11.0	8.7
Bird watching	19.6	14.6	20.0	**	**	22.4	**
Fly-fishing	9.0	8.1	8.1	4.2	7.3	8.7	10.2
Cross-country/Nordic skiing/Telemark (net)	9.1	9.6	10.5	11.4	9.3	15.3	7.7
Cross-country/Nordic skiing	8.5	9.4	9.7	9.9	7.9	13.2	5.6
Telemark skiing	**	**	**	**	**	**	**
Snowshoeing	6.7	6.2	6.7	**	**	6.7	5.5

*Mean

**Not shown due to small base size

Activity Summary

	Participants						
	Total (2054)	Hiking/ Back-packing (1129)	Bicycling paved road (1020)	Bicycling – off road (371)	Bird watching (218)	country/Nordic/ Telemark skiing (170)	Fly fishing (185)
Amount Spent In Past 2 Years							
Overall	\$787	\$938	\$849	\$1,322	\$1,032	\$2,546	\$2,457
Apparel	\$497	\$342	\$326	\$461	\$366	\$807	\$761
Equipment	\$457	\$596	\$524	\$862	\$667	\$1,739	\$1,696

Activity Summary

	Participants						
	Total (2054)	Camping (940)	Paddle sports (649)	Trail running (246)	Climbing (233)	Snowshoeing (151)	Snowboarding /Downhill skiing (354)
Amount Spent In Past 2 Years							
Overall	\$787	\$978	\$1,189	\$1,268	\$1,537	\$2,167	\$1,591
Apparel	\$497	\$351	\$409	\$544	\$570	\$753	\$587
Equipment	\$457	\$626	\$780	\$724	\$967	\$1,432	\$1,004



Activity Summary

		Participants						
		Total (1778) %	Hiking/ Back-packing (1010) %	Bicycling paved road (896) %	Bicycling – off road (351) %	Bird watching (208) %	X- country/Nordic/ Telemark skiing (160) %	Fly fishing (174) %
Apparel								
Stores have purchased from								
Discount stores	57	55	57	51	61	40	56	
Sporting good stores	49	50	53	55	45	55	60	
Outdoor specialty stores	29	32	29	36	35	54	51	
Outdoor chain stores	28	36	29	36	38	45	56	
Department stores	22	21	24	26	19	27	13	
Stores have purchased most often from								
Discount stores	35	29	32	26	31	17	30	
Sporting good stores	25	26	30	26	14	29	19	
Outdoor specialty stores	12	14	9	13	15	24	20	
Outdoor chain stores	12	16	12	16	18	23	21	
Department stores	9	8	8	11	8	6	1	

Activity Summary

Participants							
	Total (1778) %	Camping (836) %	Paddle sports (583) %	Trail running (234) %	Climbing (209) %	Snowshoeing (145) %	Snowboarding /Downhill skiing (325) %
Apparel							
Stores have purchased from							
Discount stores	57	60	55	50	40	48	38
Sporting good stores	49	48	57	57	67	51	66
Outdoor specialty stores	29	33	36	41	33	55	46
Outdoor chain stores	28	32	37	32	44	62	48
Department stores	22	18	22	27	26	16	21
Stores have purchased most often from							
Discount stores	35	35	28	20	16	19	12
Sporting good stores	25	24	27	33	36	17	39
Outdoor specialty stores	12	14	16	19	14	24	23
Outdoor chain stores	9	14	16	13	15	33	18
Department stores	12	7	7	4	8	4	5

Activity Summary

		Participants						
		Total (1444) %	Hiking/ Back-packing (831) %	Bicycling paved road (735) %	Bicycling – off road (317) %	Bird watching (171) %	country/Nordic/ Telemark skiing (146) %	Fly fishing (173) %
Equipment								
Stores have purchased from								
Discount stores	60	58	59	54	68	38	54	
Sporting good stores	40	40	41	47	49	48	48	
Outdoor specialty stores	29	34	31	35	36	50	46	
Outdoor chain stores	23	29	23	27	29	42	41	
Department stores	8	8	10	9	9	13	6	
Stores have purchased most often from								
Discount stores	42	39	40	29	41	17	29	
Sporting good stores	25	18	21	26	12	23	17	
Outdoor specialty stores	12	17	17	20	14	24	24	
Outdoor chain stores	12	16	11	14	19	21	20	
Department stores	9	2	3	3	4	5	-	

Activity Summary

		Participants					
		Total (1444) %	Camping (771) %	Paddle sports (506) %	Trail running (204) %	Climbing (184) %	Snowshoeing /Downhill skiing (129) (283) %
Equipment							
Stores have purchased from							
Discount stores	60	64	55	52	41	39	39
Sporting good stores	40	42	50	50	43	41	50
Outdoor specialty stores	29	32	38	39	41	54	45
Outdoor chain stores	23	26	32	27	32	51	33
Department stores	8	7	8	13	9	4	8
Stores have purchased most often from							
Discount stores	42	43	32	26	21	13	15
Sporting good stores	25	19	23	25	20	13	27
Outdoor specialty stores	12	16	19	22	27	30	32
Outdoor chain stores	12	12	14	13	14	28	15
Department stores	9	2	2	3	5	1	2



Profiles





Backpacking/Hiking



Backpacking/Hiking Participation

Total Marketplace

% Currently Participate	28%	}	% Potential Participation in Next 2 Years	47%	% Lapsed
% Would Consider	19%				

Among Participants

% Currently Participate	49%	Frequency of Participation (Mean # of Times in Past 2 Years)	22.6	
% Favorite	86%	% Have Traveled 50 Miles or More to Participate in Activity	54%	=
		% Have Used an RV When Traveled 50 Miles or More	11%	=

Other Activities Participate In (Top 3)

Camping	51%	↑
Bicycling – paved road	49%	=
Paddle sports	36%	↑

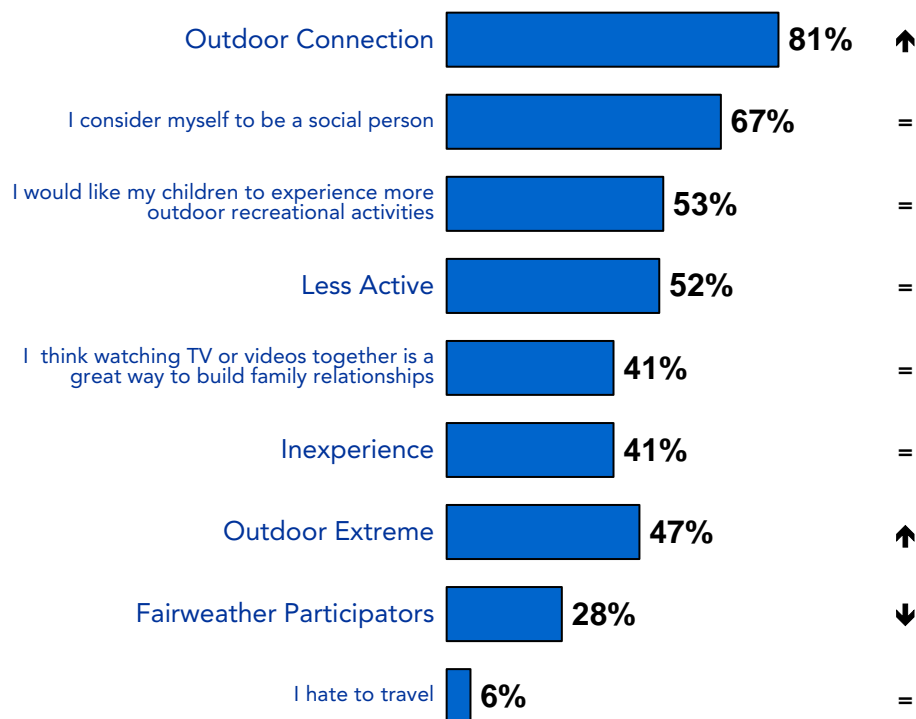
With Whom Participated (Mean # of Times)

Alone	5.0	=
Family/Friends	2.8	↑
Organized group	0.5	=
Family only	4.8	=
Friends only	2.4	=

Backpacking/Hiking Attitudes

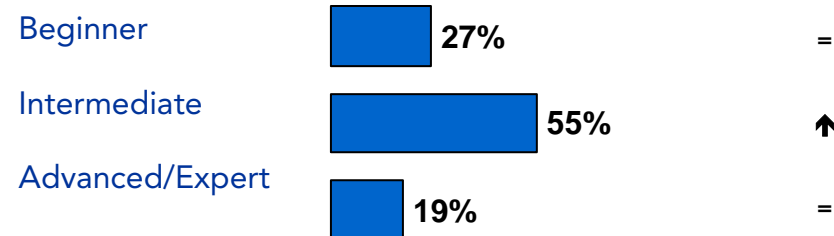
Among Participants

Attitudes (By Factor)



Involvement (Among Those Consider Backpacking/Hiking Favorite)

Experience Level Consider Themselves

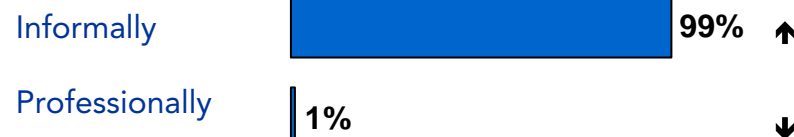


% Introduced Others to Sport

28%

=

Introduced Others to Sport



Backpacking/Hiking Lifecycle

Among Participants

Top Influencers To Start Favorite Activity

Parents/guardians/family members	45%	=
Friends/peers who were already active in it	32%	=
Friends/peers who also wanted to try	30%	=
Boy Scout programs	21%	↑

Reasons for Stopping Favorite Activity

General time constraints/ Too busy	22%	=
Location not convenient (i.e. moved/ too far to travel)	17%	=
Job got in the way	15%	=
Injuries/Health reasons	14%	=

Reasons for Starting Favorite Activity Again

I missed participating in the outdoor activity	44%	=
I wanted to lose weight	23%	↑
Lost weight/Improved physical shape	18%	↑
My friends influenced me	17%	=

Average Age Start
Favorite Activity

15.8 ↓

Average Age
Stop Favorite Activity

25.3 =

56% Stop for
a time period =

44% Never
Stop =

Start Again

Lapsed Indefinitely 51%**

Reasons for Lapsing Indefinitely

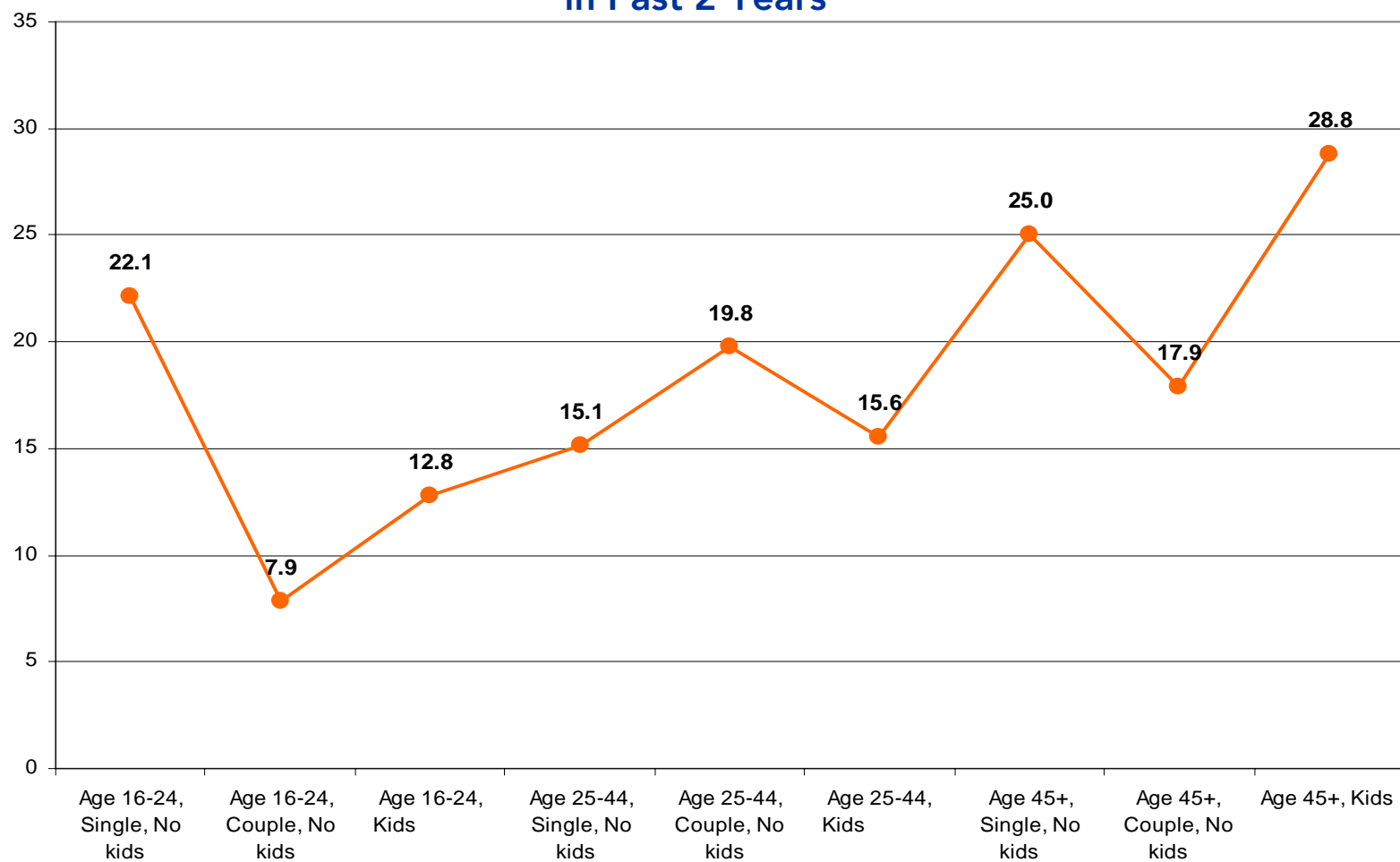
Poor physical shape or health	26%	↑
Job	25%	=
I now participate in other sports/ activities	22%	=
Time commitments with children	20%	=

**Based on ever participating in the sport

Backpacking/Hiking Lifecycle

Among Participants

Number of Times Participated
in Past 2 Years



Lifestage

Among Participants

Apparel

Average Amount Spent Past
2 Years

\$342 =

Where Shop

	Have Purchased		Most Often	
Discount stores	55% =		29%	↓
Sporting good stores	50% =		26%	=
Outdoor specialty stores	32% =		14%	=
Outdoor chain stores	36% ↑		16%	↑
Department stores	21% =		8%	=

Top Reasons Most Often

Fair price/reasonable	<div></div> 59%	=
Good quality	<div></div> 47%	↑
Has gear/equipment want/need	<div></div> 46%	↑
Has clothing want/need	<div></div> 42%	=

Equipment

\$596 =

Where Shop

	Have Purchased		Most Often	
Discount stores	58% =		39%	=
Sporting good stores	40% =		18%	=
Outdoor specialty stores	34% =		17%	=
Outdoor chain stores	29% ↑		16%	↑
Department stores	8% =		2%	=





Fair price/reasonable	<div></div> 56%	=
Has gear/equipment want/need	<div></div> 51%	=
Good quality merchandise	<div></div> 43%	↑
Convenient location	<div></div> 41%	=

Backpacking/Hiking Characteristics

Among Participants

% Male	53%	=
% White	79%	=
% Married/Living with partner	53%	=

Age

16-24		24%	=
25-34		18%	=
35-44		24%	=
45+		34%	=
Average age	38.3 years		=

Household Size

# of Adults in household (mean)	2.3	=
% of Households with children	46%	=
Average age of children	10.6	=





% Employed	65%	=
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Median Income	\$61,500	=
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Education

High school graduate or less	31%	↓
Completed some college/ College graduate	56%	=
Attended graduate school	13%	=

Where Live

Urban		25%	=
Suburban		34%	=
Small town		23%	=
Rural		18%	=

Regions

East		21%	=
South		25%	=
Midwest		25%	=
West		29%	↑





Bicycling Paved Road



Bicycling Paved Road Participation

Total Marketplace

% Currently Participate	28%	} % Potential Participation in Next 2 Years	48%	% Lapsed
% Would Consider	20%			
				44%

Among Participants

% Currently Participate	50%	Frequency of Participation (Mean # of Times in Past 2 Years)	46.2	
% Favorite	80%	% Have Traveled 50 Miles or More to Participate in Activity	18%	↓
		% Have Used an RV When Traveled 50 Miles or More	19%	=

Other Activities Participate In (Top 3)

Backpacking/ Hiking	<div></div> 47%	=
Camping	<div></div> 38%	↓
Paddle sports	<div></div> 27%	=

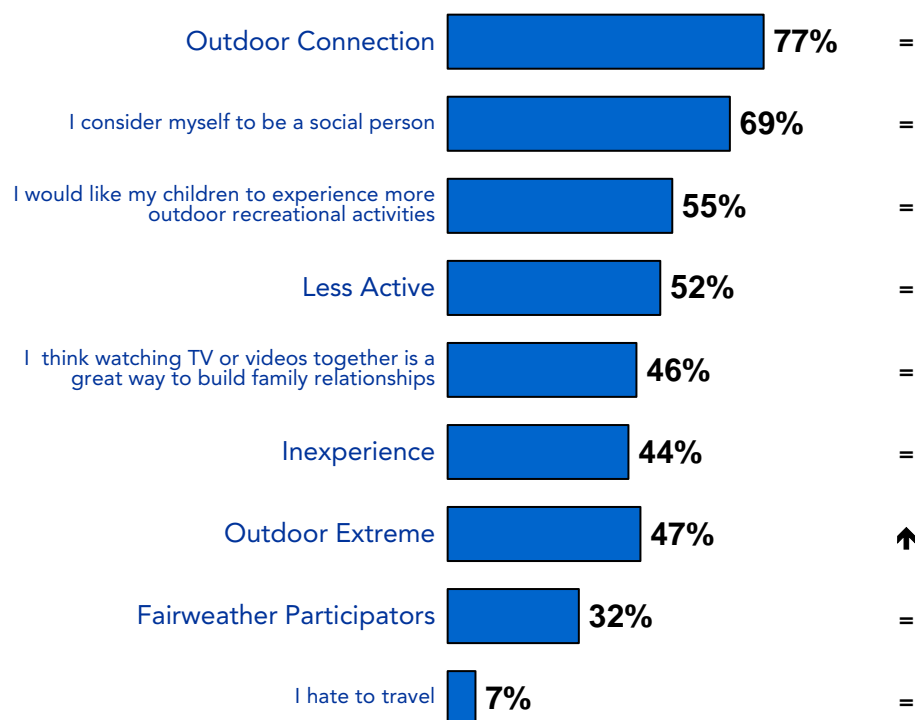
With Whom Participated (Mean # of Times)

Alone	<div></div> 26.1	↑
Family/Friends	<div></div> 2.0	=
Organized group	<div></div> 0.4	=
Family only	<div></div> 8.2	↑
Friends only	<div></div> 6.8	↑

Bicycling Paved Road Attitudes

Among Participants

Attitudes (By Factor)



Involvement (Among Those Consider Bicycling Paved Road Favorite)



*Small base size



Bicycling Paved Road Lifecycle

Among Participants

Top Influencers To Start Favorite Activity		
Parents/guardians/family members	56%	↑
Friends/peers who were already active in it	42%	↑
Friends/peers who also wanted to try	39%	↑
Personal interest	6%	=

Reasons for Stopping Favorite Activity		
General time constraints/ Too busy	19%	=
Don't have the equipment	13%	↑
Injuries/Health reasons	13%	=
Drivers license/got a vehicle	13%	↑

Reasons for Starting Favorite Activity Again		
I missed participating in the outdoor activity	30%	=
I wanted to lose weight	30%	↑
My children were interested	18%	=
Lost weight/Improved physical shape	16%	=

Average Age Start
Favorite Activity

12.9 ↓

Average Age
Stop Favorite Activity

23.8 ↓

70% Stop for
a time period ↑

30% Never
Stop ↓

Start Again

Lapsed Indefinitely 61%**

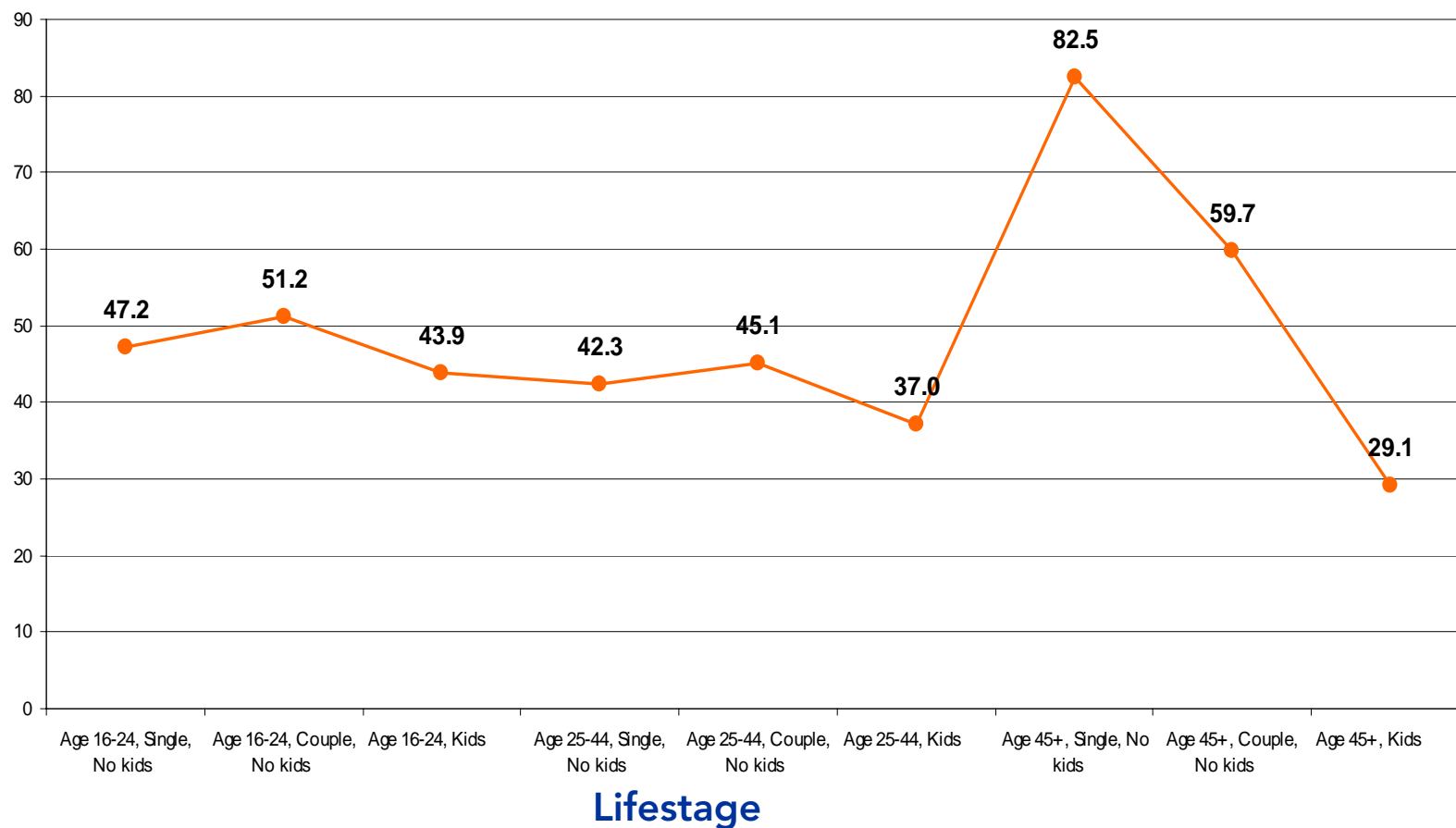
Reasons for Lapsing Indefinitely		
Lack of necessary gear/equipment	28%	↑
Don't enjoy the activity anymore	23%	↑
Job	21%	=
Poor physical condition	21%	=

**Based on ever participating in the sport

Bicycling Paved Road Lifecycle

Among Participants

Number of Times Participated
in Past 2 Years



Bicycling Paved Road Shopping Behaviors

Among Participants

Apparel

Average Amount Spent Past
2 Years

\$326 =

Where Shop	Have Purchased		Most Often	
Discount stores	57%	=	32%	=
Sporting good stores	53%	=	30%	↑
Outdoor specialty stores	29%	=	9%	=
Outdoor chain stores	29%	=	12%	=
Department stores	24%	=	8%	=

Top Reasons Most Often

Fair price/reasonable	<div></div>	59%	=
Good quality merchandise	<div></div>	44%	=
Has clothing want/need	<div></div>	43%	=
Convenient location	<div></div>	42%	=

Equipment

\$524 =

Where Shop	Have Purchased		Most Often	
Discount stores	59%	=	40%	=
Sporting good stores	41%	=	21%	=
Outdoor specialty stores	31%	=	17%	=
Outdoor chain stores	23%	=	11%	=
Department stores	10%	=	3%	=





Fair price/reasonable	<div></div>	58%	↑
Has gear/equipment want/need	<div></div>	49%	=
Convenient location	<div></div>	43%	=
Good quality merchandise	<div></div>	38%	=

Bicycling Paved Road Characteristics

Among Participants

% Male	55%	=
% White	74%	=
% Married/Living with partner	55%	=

Age

16-24		28%	↑
25-34		16%	=
35-44		22%	=
45+		34%	=
Average age		37.5 years	=

Household Size

# of Adults in household (mean)	2.4	=
% of Households with children	50%	=
Average age of children	10.6	=





% Employed	63%	=
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Median Income	\$63,200	=
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Education

High school graduate or less	37%	=
Completed some college/ College graduate	52%	=
Attended graduate school	11%	=

Where Live

Urban		28%	=
Suburban		35%	=
Small town		23%	=
Rural		14%	=

Regions

East		20%	=
South		28%	=
Midwest		29%	=
West		23%	=





Bicycling Off Road



Bicycling Off Road Participation

Total Marketplace

% Currently Participate

10%

% Would Consider

10%

% Potential Participation in Next 2
Years

20%

% Lapsed

18%

Among Participants

% Currently Participate

15%

% Favorite

61%

Frequency of Participation

(Mean # of Times in Past 2 Years)

30.7

% Have Traveled 50 Miles or More to
Participate in Activity

31%

↓

% Have Used an RV When Traveled
50 Miles or More

15%

=

Other Activities Participate In (Top 3)

Bicycling – paved road



83%

↑

Backpacking/
Hiking



68%

↑

Camping



49%

=

With Whom Participated (Mean # of Times)

Alone



24.9

↑

Family/Friends



1.4

=

Organized group



0.2

=

Family only



6.2

=

Friends only



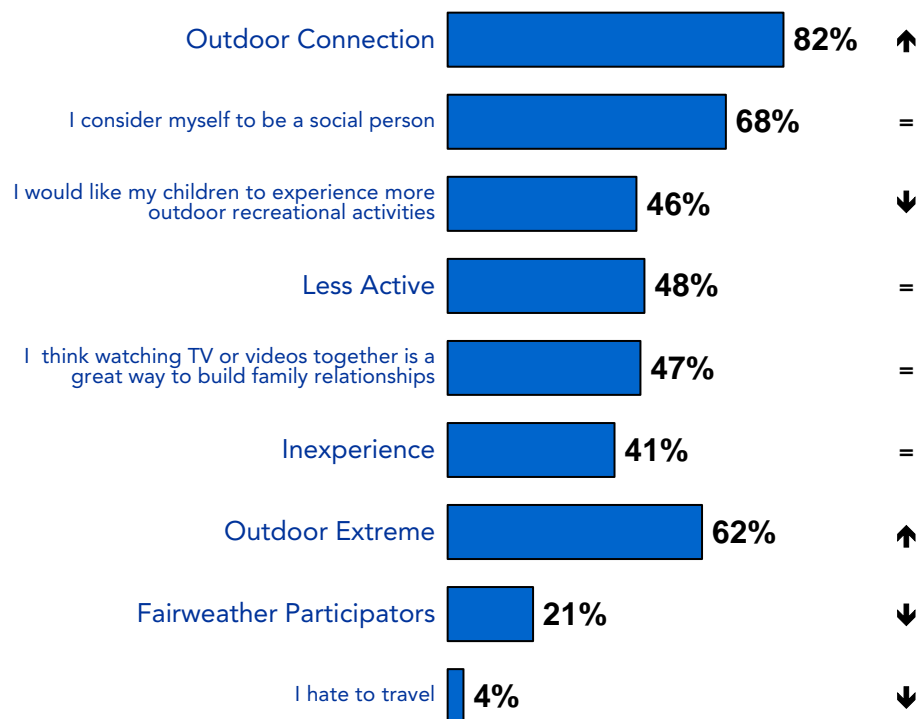
12.7

↑

Bicycling Off Road Attitudes

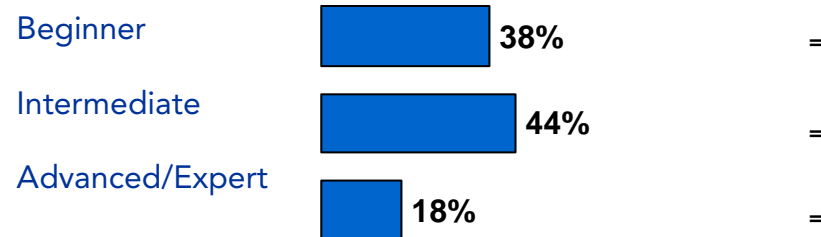
Among Participants

Attitudes (By Factor)



Involvement (Among Those Consider Bicycling Off Road Favorite)

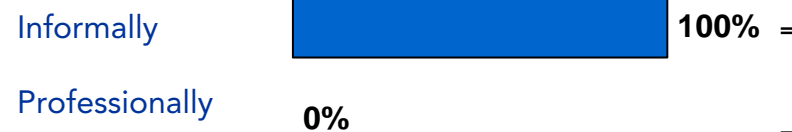
Experience Level Consider Themselves



% Introduced Others to Sport

26% =

Introduced Others to Sport



Bicycling Off Road Lifecycle

Among Participants

Top Influencers To Start Favorite Activity

Friends/peers who were already active in it	39%	=
Friends/peers who also wanted to try	30%	=
Parents/guardians/family members	23%	↓
Personal interest	11%	↑

Reasons for Stopping Favorite Activity

General time constraints/ Too busy	26%	=
School commitment	16%	=
Location not convenient (i.e. moved/ too far to travel)	12%	=
Don't have the equipment	11%	=

Reasons for Starting Favorite Activity Again

I missed participating in the outdoor activity	37%	=
I wanted to lose weight	30%	=
Lost weight/Improved physical shape	17%	=
My friends influenced me	16%	=

Average Age Start
Favorite Activity

18.7 =

Average Age
Stop Favorite Activity

25.2 =

55% Stop for
a time period =

45% Never
Stop =

Start Again

Lapsed Indefinitely 64%**

Reasons for Lapsing Indefinitely

Job	30%	↑
Time commitments	23%	↑
Poor physical shape or health	23%	=
Lack of necessary gear/equipment	21%	=

**Based on ever participating in the sport

Bicycling Off Road Shopping Behaviors

Among Participants

Apparel

Average Amount Spent Past
2 Years

\$461 ↑

Where Shop

Have Purchased

Most Often

Discount stores	51%	=	26%	↓
Sporting good stores	55%	=	26%	=
Outdoor specialty stores	36%	↑	13%	=
Outdoor chain stores	36%	↑	16%	=
Department stores	26%	=	11%	=

Top Reasons Most Often

Fair price/reasonable	<div></div> 58%	=
Has gear/equipment want/need	<div></div> 46%	=
Good quality merchandise	<div></div> 45%	=
Convenient location	<div></div> 40%	=

Equipment

\$862 ↑

Have Purchased

Most Often

Discount stores	54%	=	29%	↓
Sporting good stores	47%	=	26%	↑
Outdoor specialty stores	35%	=	20%	=
Outdoor chain stores	27%	=	14%	=
Department stores	9%	=	3%	=





Fair price/reasonable	<div></div> 56%	=
Has gear/equipment want/need	<div></div> 49%	=
Convenient location	<div></div> 46%	↑
Good quality merchandise	<div></div> 45%	↑

Bicycling Off Road Characteristics

Among Participants

% Male	64%	↑
% White	76%	=
% Married/Living with partner	46%	↓

Age

16-24	 40%	↑
25-34	 16%	=
35-44	 18%	=
45+	 26%	↓

Average age 33.5 years ↓

Household Size

# of Adults in household (mean)	2.7	↑
% of Households with children	50%	=
Average age of children	11.1	↑





% Employed 59% =

Median Income \$59,300 =





Education

High school graduate or less	39%	=
Completed some college/		
College graduate	51%	=
Attended graduate school	10%	=

Where Live

Urban	 32%	=
Suburban	 31%	=
Small town	 25%	=
Rural	 12%	=

Regions

East	 19%	=
South	 24%	=
Midwest	 31%	=
West	 26%	=



Birdwatching



Birdwatching Participation

Total Marketplace

% Currently Participate

5%

% Would Consider

8%

% Potential Participation in Next 2
Years

13%

% Lapsed

3%

Among Participants

% Currently Participate

7%

% Favorite

70%

Frequency of Participation

(Mean # of Times in Past 2 Years)

19.6

% Have Traveled 50 Miles or More to
Participate in Activity

71%

↑

% Have Used an RV When Traveled
50 Miles or More

23%

=

Other Activities Participate In (Top 3)

Backpacking/
Hiking



67%

↑

Camping



47%

=

Bicycling – paved road



45%

=

With Whom Participated (Mean # of Times)

Alone



3.4

=

Family/Friends



2.0

=

Organized group



0.4

=

Family only



13.3

↑

Friends only



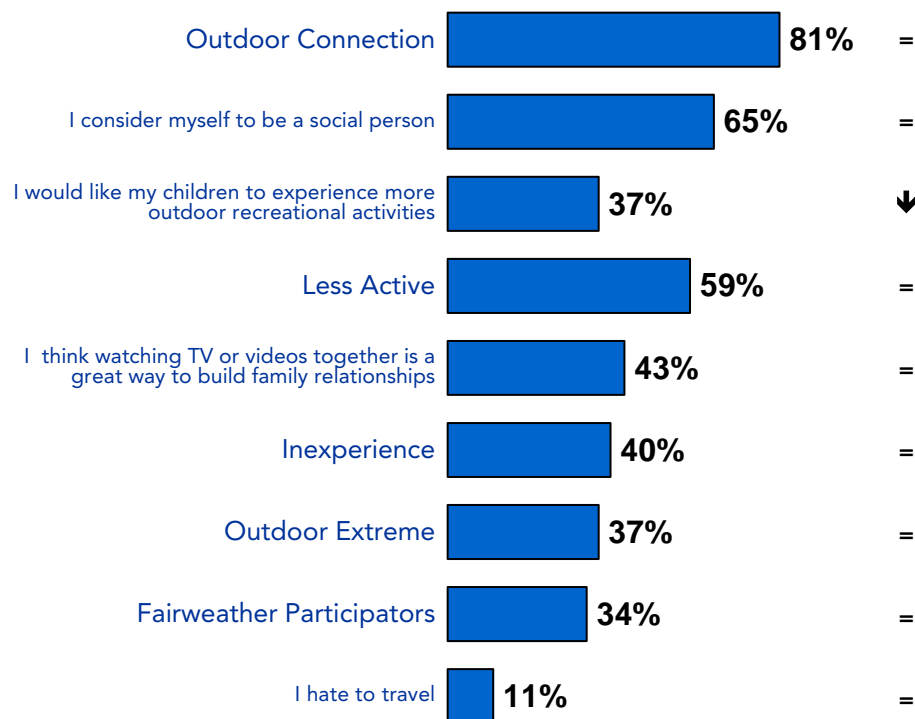
2.2

=

Birdwatching Attitudes

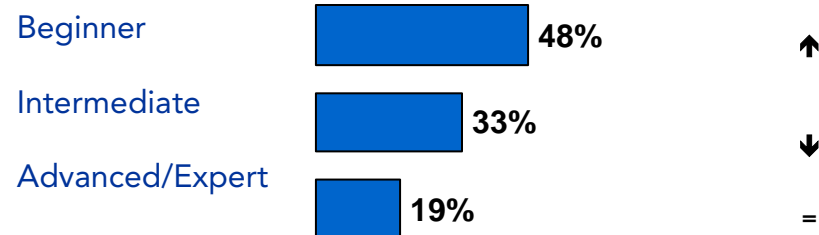
Among Participants

Attitudes (By Factor)



Involvement (Among Those Consider Birdwatching Favorite)

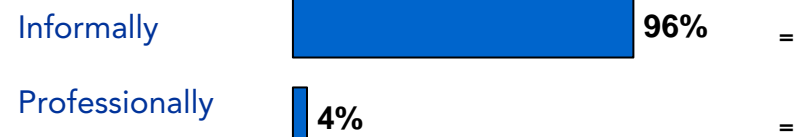
Experience Level Consider Themselves



% Introduced Others to Sport

34%

Introduced Others to Sport



Birdwatching Lifecycle

Among Participants

Top Influencers To Start Favorite Activity		
Book	37%	↑
Parents/guardians/family members	35%	=
Friends/peers who wanted to try	27%	=
Friends/peers who were already active in it	26%	=

Reasons for Stopping Favorite Activity*	
Got married	32%
Pregnancy/birth of child	27%
Injuries/health reasons	22%
General time constraints/ Too busy	17%

Reasons for Starting Favorite Activity Again*	
I missed participating in the outdoor activity	34%
My friends influenced me	27%
Other social club/activity	19%
My children were interested	18%

Average Age Start
Favorite Activity

29.1

Average Age
Stop Favorite Activity*

31.5

35% Stop for
a time period

65% Never
Stop

Start Again

Lapsed Indefinitely 39%**

Reasons for Lapsing Indefinitely		
I now participate in other sports/activities	29%	=
Time commitments with children	21%	=
Don't enjoy the activity anymore	18%	=
Don't know anyone to do it with	16%	=

*Small base size

**Based on ever participating in the sport

Birdwatching Shopping Behaviors

Among Participants

Apparel

Average Amount Spent Past 2 Years

\$366 =

Where Shop	Have Purchased		Most Often	
Discount stores	61%	=	31%	=
Sporting good stores	45%	=	14%	↓
Outdoor specialty stores	35%	=	15%	=
Outdoor chain stores	38%	↑	18%	=
Department stores	19%	=	8%	=

Top Reasons Most Often

Fair price/reasonable	<div></div> 69%	↑
Good quality merchandise	<div></div> 52%	↑
Has clothing want/need	<div></div> 51%	↑
Convenient location	<div></div> 48%	=

Equipment

\$667 =

Where Shop	Have Purchased		Most Often	
Discount stores	68%	=	41%	=
Sporting good stores	49%	=	12%	↓
Outdoor specialty stores	36%	=	14%	=
Outdoor chain stores	29%	=	19%	↑
Department stores	9%	=	4%	=





Fair price/reasonable	<div></div> 63%	↑
Convenient location	<div></div> 50%	↑
Has gear/equipment want/need	<div></div> 49%	=
Good quality merchandise	<div></div> 45%	↑

Birdwatching Characteristics

Among Participants

% Male	49%	=
% White	74%	=
% Married/Living with partner	60%	=

Age

16-24	 10%	↓
25-34	 13%	=
35-44	 20%	=
45+	 57%	↑

Average age 47.1 years ↑

Household Size

# of Adults in household (mean)	2.1	=
% of Households with children	40%	=
Average age of children	10.2	=





% Employed 54% ↓

Median Income \$50,800 =





Education

High school graduate or less	28%	↓
Completed some college/ College graduate	57%	=
Attended graduate school	15%	=

Where Live

Urban	 25%	=
Suburban	 34%	=
Small town	 23%	=
Rural	 18%	=

Regions

East	 26%	=
South	 28%	=
Midwest	 27%	=
West	 19%	=





Cross Country/Nordic/ Telemark Skiing





Cross Country/Nordic/Telemark Skiing Participation

Total Marketplace

% Currently Participate	2%	} % Potential Participation in Next 2 Years	8%	% Lapsed
% Would Consider	6%			

Among Participants

% Currently Participate	5%	Frequency of Participation (Mean # of Times in Past 2 Years)	17.8	
% Favorite	49%	% Have Traveled 50 Miles or More to Participate in Activity	63%	=
		% Have Used an RV When Traveled 50 Miles or More	25%	=

Other Activities Participate In (Top 3)

Backpacking/ Hiking	74%	↑
Bicycling – paved road	70%	↑
Paddle sports	60%	↑

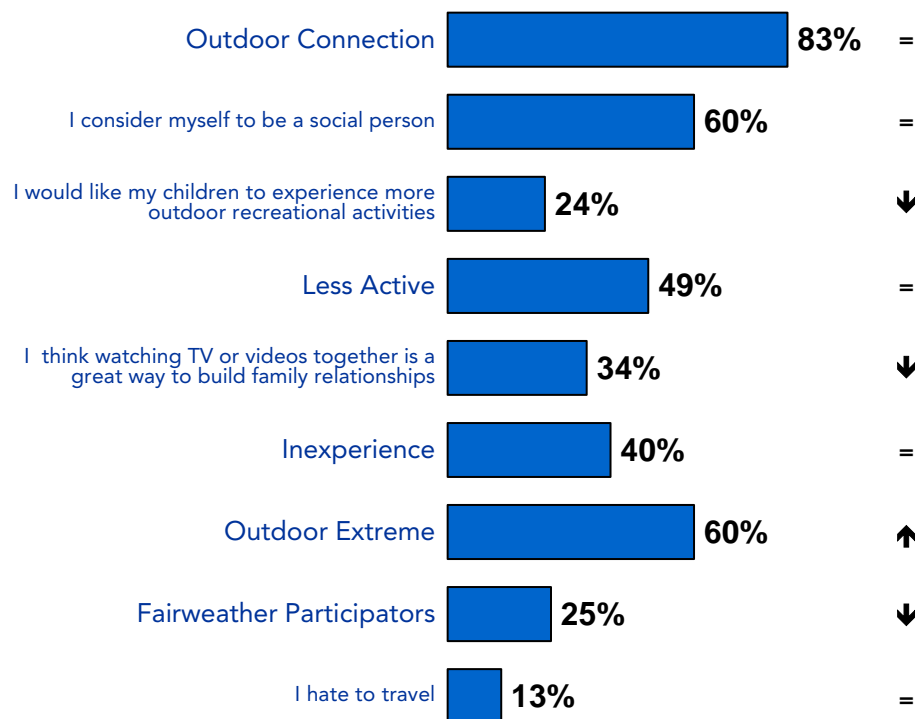
With Whom Participated (Mean # of Times)

Alone	2.4	=
Family/Friends	1.8	=
Organized group	1.8	=
Family only	7.0	=
Friends only	1.6	=

Cross Country/Nordic/Telemark Skiing Attitudes

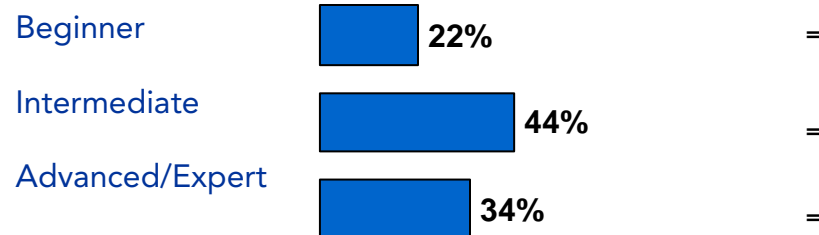
Among Participants

Attitudes (By Factor)



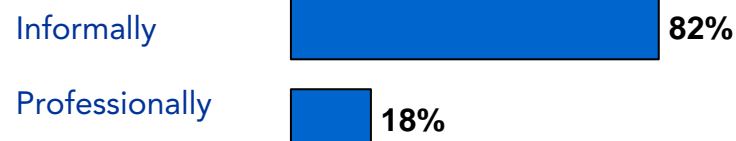
Involvement (Among Those Consider Cross Country/Nordic/Telemark Skiing Favorite)

Experience Level Consider Themselves



% Introduced Others to Sport 52%

Introduced Others to Sport*



*Small base size



Cross Country/Nordic/Telemark Skiing Lifecycle

Among Participants

Top Influencers To Start Favorite Activity

Parents/guardians/family members	40%	=
Friends/peers who were already active in it	35%	=
Friends/peers who wanted to try	20%	=
Book	15%	=

Reasons for Stopping Favorite Activity*

Job got in the way	21%
Injuries/health reasons	17%
Lost interest/desire	13%
General time constraints/ Too busy	12%

Reasons for Starting Favorite Activity Again*

I missed participating in the outdoor activity	53%
I retired from working full-time	43%
My children were interested	20%
Lost weight/Improved physical shape	15%

Average Age Start
Favorite Activity

24.7 ↑

Average Age
Stop Favorite Activity*

45.5

44% Stop for
a time period =

56% Never
Stop =

Start Again

Lapsed Indefinitely 63%**

Reasons for Lapsing Indefinitely

Job	22%	=
Don't enjoy the activity anymore	22%	=
Moved/No longer have access to activity	22%	↑
Time commitments with children	21%	=

*Small base size

**Based on ever participating in the sport

Cross Country/Nordic/Telemark Skiing Shopping Behaviors

Among Participants

Apparel

Average Amount Spent Past
2 Years

\$807 ↑

Where Shop

	Have Purchased		Most Often	
Discount stores	40%	↓	17%	↓
Sporting good stores	55%	=	29%	=
Outdoor specialty stores	54%	↑	24%	↑
Outdoor chain stores	45%	↑	23%	↑
Department stores	27%	=	6%	=

Top Reasons Most Often

Fair price/reasonable	<div></div> 57%	=
Has gear/equipment want/need	<div></div> 52%	↑
Good quality merchandise	<div></div> 51%	=
Good selection	<div></div> 41%	=

Equipment

\$1,739 ↑

Where Shop

	Have Purchased		Most Often	
Discount stores	38%	↓	17%	↓
Sporting good stores	48%	=	23%	=
Outdoor specialty stores	50%	↑	24%	=
Outdoor chain stores	42%	↑	21%	↑
Department stores	13%	↑	5%	↑





Has gear/equipment want/need	<div></div> 55%	=
Fair price/reasonable	<div></div> 42%	↓
Convenient location	<div></div> 39%	=
Good quality merchandise	<div></div> 38%	=

Cross Country/Nordic/Telemark Skiing Characteristics

Among Participants

% Male	60%	=
% White	84%	↑
% Married/Living with partner	57%	=

Age

16-24	 25%	=
25-34	 17%	=
35-44	 20%	=
45+	 38%	=

Average age 39 years =

Household Size

# of Adults in household (mean)	2.3	=
% of Households with children	43%	=
Average age of children	10.3	=





% Employed 65% =

Median Income \$71,000 ↑





Education

High school graduate or less	30%	=
Completed some college/ College graduate	47%	=
Attended graduate school	23%	↑

Where Live

Urban	 29%	=
Suburban	 34%	=
Small town	 23%	=
Rural	 14%	=

Regions

East	 26%	=
South	 11%	↓
Midwest	 29%	=
West	 34%	↑



Fly Fishing



Fly Fishing Participation

Total Marketplace

% Currently Participate

4%

% Would Consider

8%

% Potential Participation in Next
2 Years

12%

% Lapsed

5%

Among Participants

% Currently Participate

7%

% Favorite

82%

Frequency of Participation

(Mean # of Times in Past 2 Years)

11.8

% Have Traveled 50 Miles or More to
Participate in Activity

71%



% Have Used an RV When Traveled
50 Miles or More

26%



Other Activities Participate In (Top 3)

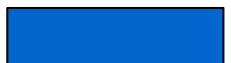
Backpacking/
Hiking



51%

=

Camping



49%

=

Bicycling – paved road



38%

↓

With Whom Participated (Mean # of Times)

Alone



2.4

=

Family/Friends



2.1

=

Organized group



0.3

=

Family only



4.2

=

Friends only



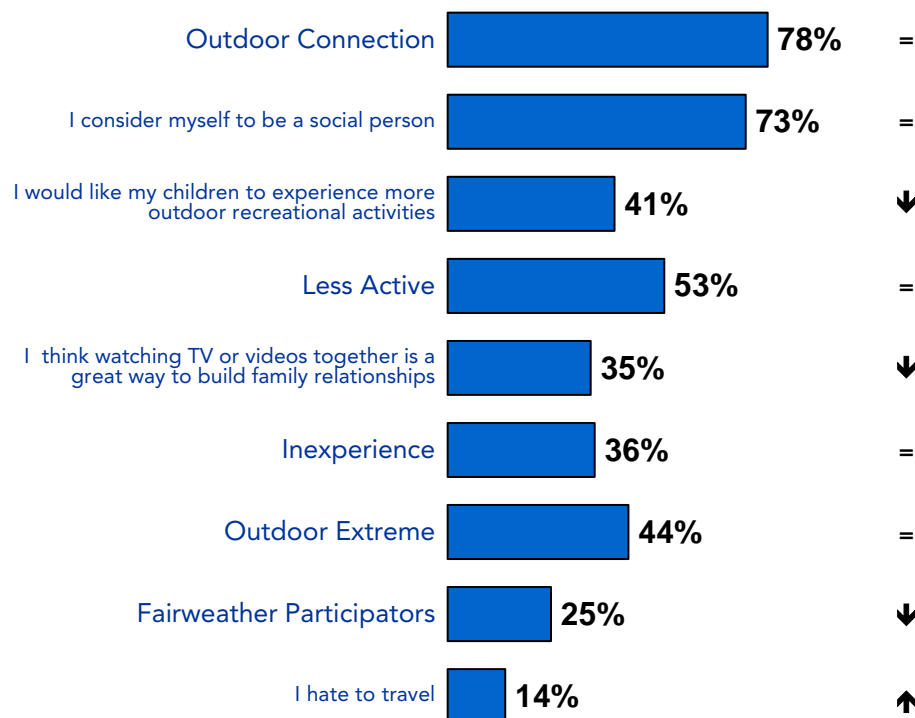
2.4

=

Fly Fishing Attitudes

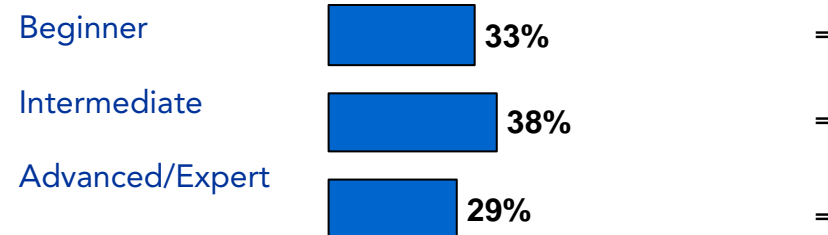
Among Participants

Attitudes (By Factor)



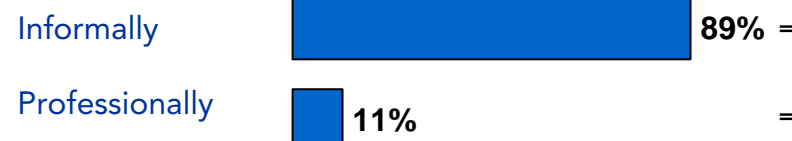
Involvement (Among Those Consider Flyfishing Favorite)

Experience Level Consider Themselves



% Introduced Others to Sport **40%**

Introduced Others to Sport



Fly Fishing Lifecycle

Among Participants

Top Influencers To Start Favorite Activity

Parents/guardians/family members	44%	=
Friends/peers who were already active in it	39%	=
Friends/peers who wanted to try	23%	=
Media	8%	=

Reasons for Stopping Favorite Activity

General time constraints/ Too busy	32%	=
Location not convenient (i.e. moved/too far to travel)	20%	=
Work constraints	16%	=
Injuries/health reasons	12%	=

Reasons for Starting Favorite Activity Again

I missed participating in the outdoor activity	55%	↑
My friends influenced me	15%	=
I retired from work full-time	13%	=
I now have more money to invest in it	11%	=

Average Age Start Favorite Activity

26.5 ↑

Average Age Stop Favorite Activity

32.1 ↑

41% Stop for a time period ↓

59% Never Stop ↑

Start Again

Lapsed Indefinitely 55%**

Reasons for Lapsing Indefinitely

Lack of necessary gear	23%	=
Poor physical shape or health	20%	=
Don't know anyone to do it with	19%	=
Time commitments for home improvements	18%	=

**Based on ever participating in the sport

Fly Fishing Shopping Behaviors

Among Participants

Apparel

Average Amount Spent Past
2 Years

\$761 ↑

Where Shop

Have Purchased

Most Often

Discount stores	56%	=	30%	=
Sporting good stores	60%	↑	19%	=
Outdoor specialty stores	51%	↑	20%	↑
Outdoor chain stores	56%	↑	21%	↑
Department stores	13%	↓	1%	↓

Top Reasons Most Often

Fair price/reasonable	<div></div> 57%	=
Good quality merchandise	<div></div> 55%	↑
Has clothing want/need	<div></div> 55%	↑
Has gear/equipment want/need	<div></div> 54%	↑

Equipment

\$1,696 ↑

Have Purchased

Most Often

Discount stores	54%	=	29%	↓
Sporting good stores	48%	=	17%	=
Outdoor specialty stores	46%	↑	24%	↑
Outdoor chain stores	41%	↑	20%	↑
Department stores	6%	=	-	=





Fair price/reasonable	<div></div> 60%	=
Has gear/equipment want/need	<div></div> 57%	↑
Good selection	<div></div> 50%	↑
Good quality merchandise	<div></div> 43%	↑

Fly Fishing Characteristics

Among Participants

% Male	80%	↑
% White	82%	=
% Married/Living with partner	67%	↑

Age

16-24	 13%	↓
25-34	 14%	=
35-44	 26%	=
45+	 47%	=

Average age 43.6 years ↑

Household Size

# of Adults in household (mean)	2.2	=
% of Households with children	43%	=
Average age of children	9.3	↓





% Employed 73% =

Median Income \$71,400 ↑





Education

High school graduate or less	34%	=
Completed some college/ College graduate	54%	=
Attended graduate school	12%	=

Where Live

Urban	 18%	↓
Suburban	 31%	=
Small town	 33%	=
Rural	 18%	=

Regions

East	 15%	=
South	 26%	=
Midwest	 24%	=
West	 35%	↑





Camping



Camping Participation

Total Marketplace

% Currently Participate	25%	}	% Potential Participation in Next 2 Years	47%	% Lapsed
% Would Consider	22%				

Among Participants

% Currently Participate	43%	Frequency of Participation (Mean # of Times in Past 2 Years)	9.3	
% Favorite	85%	% Have Traveled 50 Miles or More to Participate in Activity	72%	↑
		% Have Used an RV When Traveled 50 Miles or More	13%	=

Other Activities Participate In (Top 3)

Backpacking/ Hiking	57%	↑
Bicycling – paved road	43%	↓
Paddle sports	36%	↑

With Whom Participated (Mean # of Times)

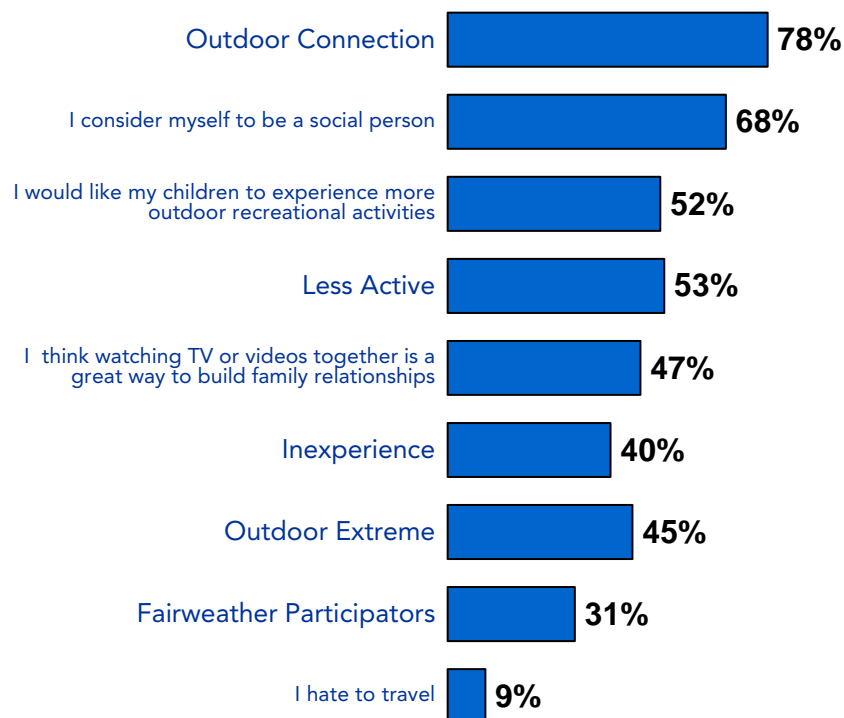
Alone	0.1	↓
Family/Friends	1.3	=
Organized group	0.5	=
Family only	2.0	↓
Friends only	0.8	↓



Camping Attitudes

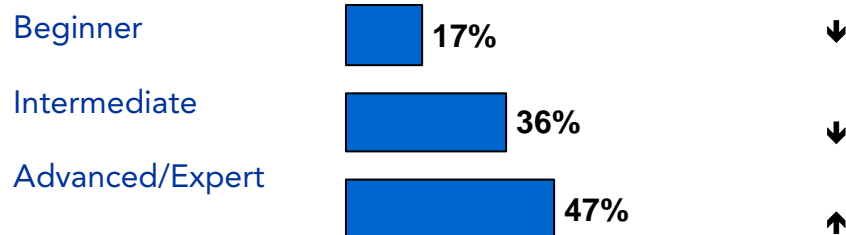
Among Participants

Attitudes (By Factor)



Involvement (Among Those Consider Camping Favorite)

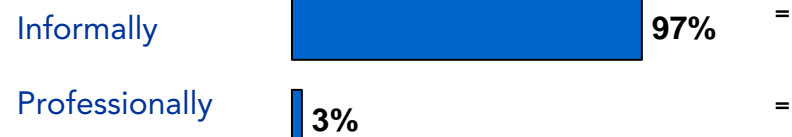
Experience Level Consider Themselves



% Introduced Others to Sport

36% =

Introduced Others to Sport



Camping Lifecycle

Among Participants

Top Influencers To Start Favorite Activity

Parents/guardians/family members	53%	↑
Friends/peers who were already active in it	23%	↓
Boy Scout programs	21%	↑
Friends/peers who wanted to try	20%	↓

Reasons for Stopping Favorite Activity

General time constraints/ Too busy	22%	=
Job got in the way	14%	=
Lost interest/desire	11%	=
Location not convenient (i.e. moved/too far to travel)	10%	=

Reasons for Starting Favorite Activity Again

I missed participating in the outdoor activity	42%	=
My children were interested	29%	↑
My friends influenced me	24%	=
My spouse/family member	21%	↑

Average Age Start
Favorite Activity

12.9 ↓

Average Age
Stop Favorite Activity

23.5 =

61% Stop for
a time period ↑

39% Never
Stop ↓

Start Again

Lapsed Indefinitely 55%**

Reasons for Lapsing Indefinitely

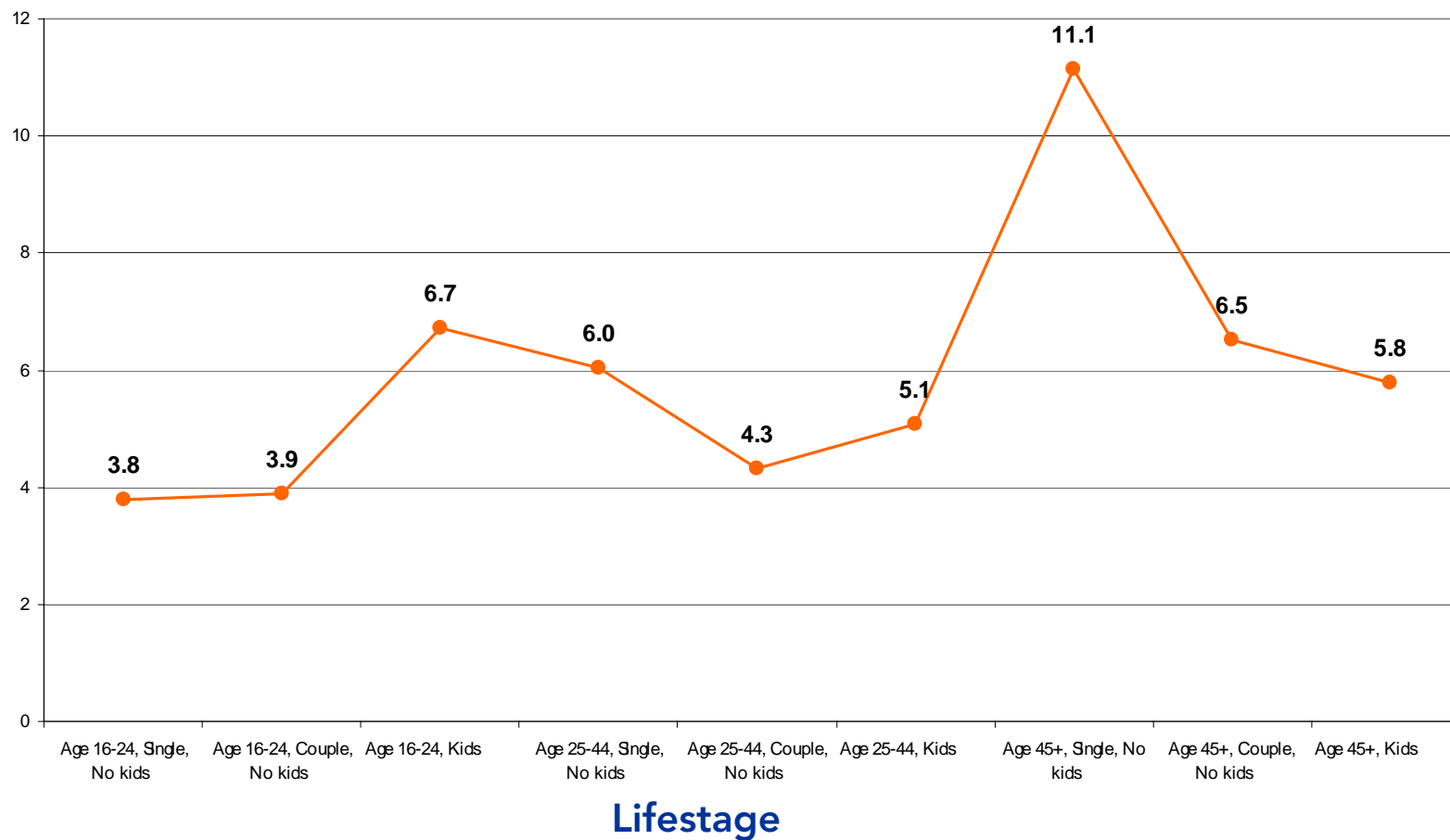
Don't enjoy the activity anymore	27%	↑
Lack of necessary gear/equipment	24%	=
Job	19%	=
I now participate in other sports/activities	17%	=

**Based on ever participating in the sport

Camping Lifecycle

Among Participants

Number of Times Participated
in Past 2 Years



Camping Shopping Behaviors

Among Participants

Apparel

Average Amount Spent Past
2 Years

\$351 =

Where Shop	Have Purchased		Most Often	
Discount stores	60%	=	35%	=
Sporting good stores	48%	=	24%	=
Outdoor specialty stores	33%	=	14%	=
Outdoor chain stores	32%	=	14%	=
Department stores	18%	=	7%	=

Top Reasons Most Often

Reasonable/fair prices	<div></div> 59%	=
Has gear/equipment want/need	<div></div> 44%	=
Convenient location	<div></div> 43%	=
Good quality merchandise	<div></div> 43%	=

Equipment

\$626 =

	Have Purchased		Most Often	
Discount stores	64%	=	43%	=
Sporting good stores	42%	=	19%	=
Outdoor specialty stores	32%	=	16%	=
Outdoor chain stores	26%	=	12%	=
Department stores	7%	=	2%	=



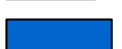

Reasonable/fair prices	<div></div> 56%	=
Has gear/equipment want/need	<div></div> 50%	=
Convenient location	<div></div> 41%	=
One-stop shopping	<div></div> 40%	↑

Camping Characteristics

Among Participants

% Male	52%	=
% White	78%	=
% Married/Living with partner	53%	=

Age

16-24		27%	↑
25-34		21%	=
35-44		25%	=
45+		27%	↓
Average age		35.4 years	↓

Household Size

# of Adults in household (mean)	2.3	=
% of Households with children	51%	=
Average age of children	10.3	=





% Employed	64%	=
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Median Income	\$47,400	=
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Education

High school graduate or less	41%	=
Completed some college/		
College graduate	52%	=
Attended graduate school	7%	=

Where Live

Urban		25%	=
Suburban		29%	=
Small town		29%	=
Rural		17%	=

Regions

East		18%	=
South		24%	=
Midwest		25%	=
West		33%	↑





Paddle Sports



Paddle Sports Participation

Total Marketplace

% Currently Participate

15%

% Would Consider

19%

% Potential Participation in Next 2
Years

34%

% Lapsed

17%

Among Participants

% Currently Participate

29%

% Favorite

85%

Frequency of Participation

(Mean # of Times in Past 2 Years)

5.6

% Have Traveled 50 Miles or More to
Participate in Activity

65%

↑

% Have Used an RV When Traveled
50 Miles or More

11%

=

Other Activities Participate In (Top 3)

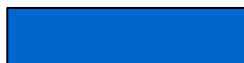
Backpacking/
Hiking



61%

↑

Camping



54%

↑

Bicycling – paved road



47%

=

With Whom Participated (Mean # of Times)

Alone

0.4

↓

Family/Friends

0.9

=

Organized group

0.2

=

Family only

1.7

↓

Friends only

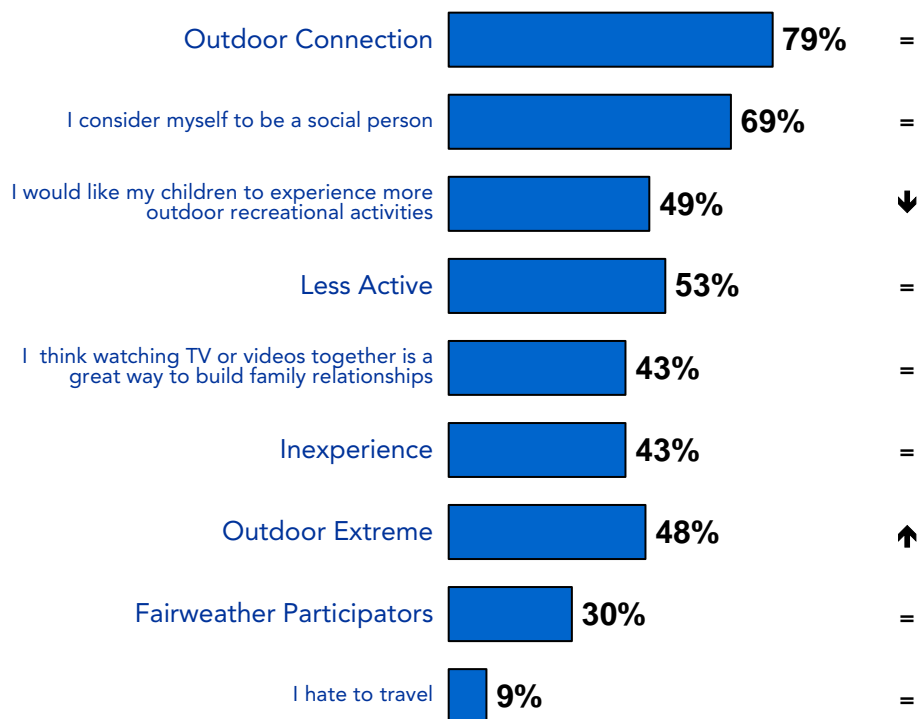
1.6

↓

Paddle Sports Attitudes

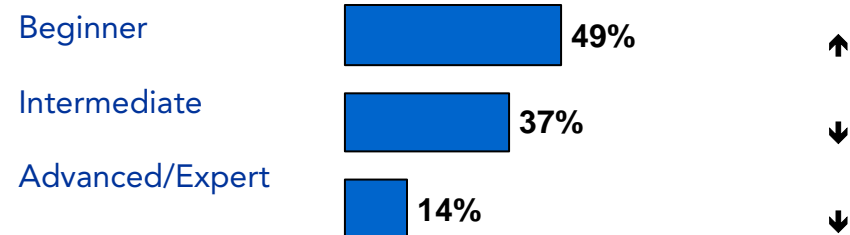
Among Participants

Attitudes (By Factor)



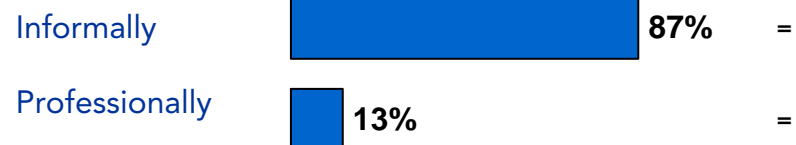
Involvement (Among Those Consider Paddle Sports Favorite)

Experience Level Consider Themselves



% Introduced Others to Sport **31%** =

Introduced Others to Sport



Paddle Sports Lifecycle

Among Participants

Top Influencers To Start Favorite Activity

Parents/guardians/family members	34%	↓
Friends/peers who wanted to try	30%	=
Friends/peers who were already active in it	27%	=
Boy Scout programs	10%	=

Reasons for Stopping Favorite Activity

General time constraints/ Too busy	15%	=
Location not convenient (i.e. moved/too far to travel)	12%	=
Job got in the way	12%	=
Money issues	9%	↑

Reasons for Starting Favorite Activity Again

I missed participating in the outdoor activity	34%	=
My friends influenced me	27%	=
My children were interested	24%	=
Lost weight/Improved physical shape	11%	=

Average Age Start
Favorite Activity

24.9 ↑

Average Age
Stop Favorite Activity

27.8 =

48% Stop for
a time period =

52% Never
Stop =

Start Again

Lapsed Indefinitely 52%**

Reasons for Lapsing Indefinitely

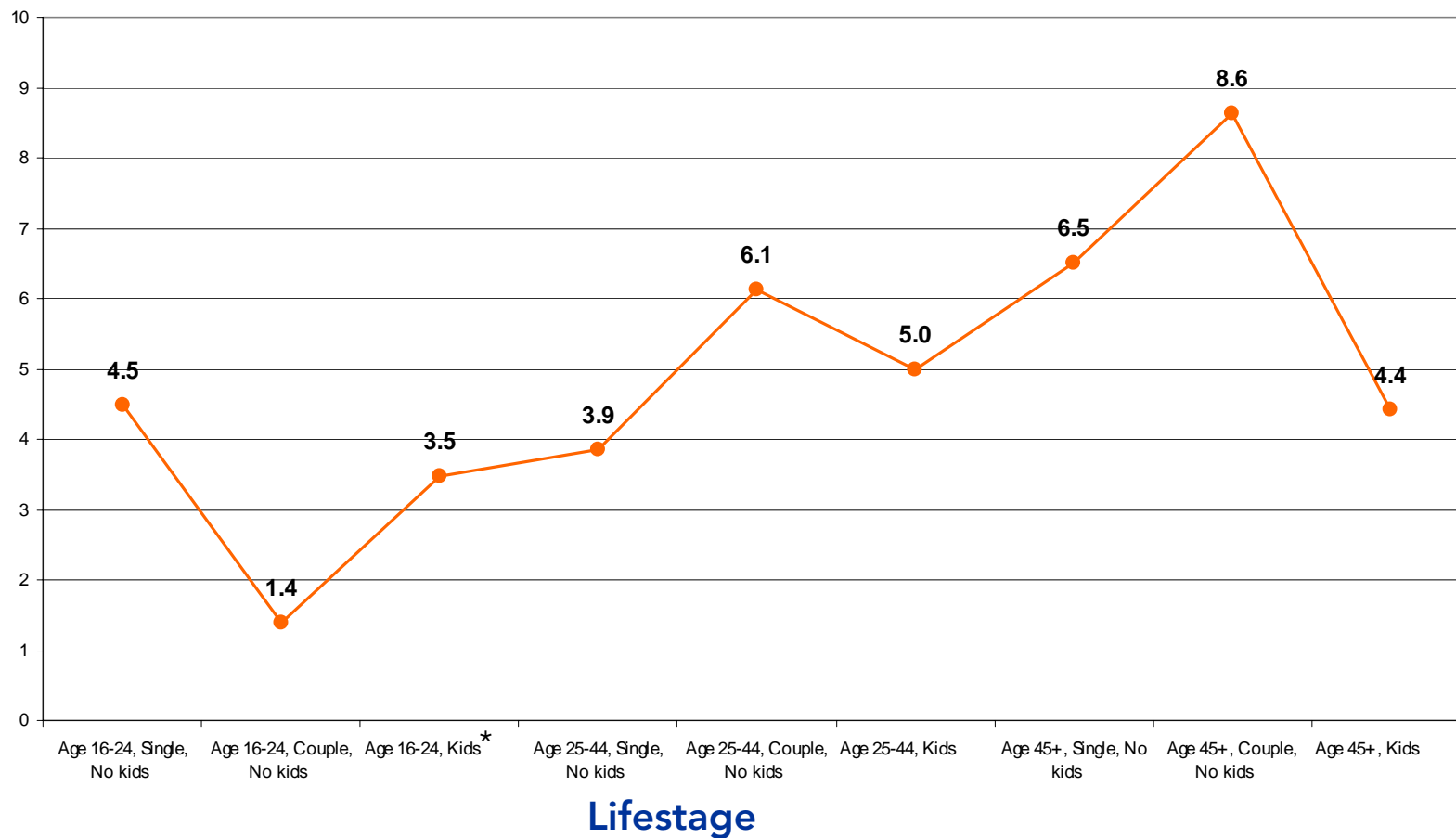
Lack of necessary gear/equipment	32%	↑
Don't know anyone to do it with	24%	=
I now participate in other sports/activities	23%	=
Job	21%	=

**Based on ever participating in the sport

Paddle Sports Lifecycle

Among Participants

Number of Times Participated
in Past 2 Years



*Small base size



Paddle Sports Shopping Behaviors

Among Participants

Apparel

Average Amount Spent Past 2 Years

\$409 ↑

Where Shop

Have Purchased

Most Often

Discount stores	55%	=	28%	↓
Sporting good stores	57%	↑	27%	=
Outdoor specialty stores	36%	↑	16%	=
Outdoor chain stores	37%	↑	16%	↑
Department stores	22%	=	7%	=

Top Reasons Most Often

Fair price/reasonable	<div></div> 58%	=
Has gear/equipment want/need	<div></div> 45%	=
Good selection	<div></div> 43%	=
Good quality merchandise	<div></div> 42%	=

Equipment

\$780 ↑

Have Purchased

Most Often

Discount stores	55%	=	32%	↓
Sporting good stores	50%	↑	23%	=
Outdoor specialty stores	38%	↑	19%	=
Outdoor chain stores	32%	↑	14%	=
Department stores	8%	=	2%	=





Fair price/reasonable	<div></div> 55%	=
Has gear/equipment want/need	<div></div> 53%	↑
Convenient location	<div></div> 40%	=
Good quality merchandise	<div></div> 40%	↑

Paddle Sports Characteristics

Among Participants

% Male	53%	=
% White	78%	=
% Married/Living with partner	51%	=

Age

16-24		31%	↑
25-34		18%	=
35-44		20%	=
45+		31%	↓
Average age		35.7 years	↓

Household Size

# of Adults in household (mean)	2.3	=
% of Households with children	50%	=
Average age of children	10.3	=





% Employed	65%	=
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Median Income	\$68,600	↑
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Education

High school graduate or less	35%	=
Completed some college/		
College graduate	54%	=
Attended graduate school	11%	=

Where Live

Urban		23%	=
Suburban		37%	=
Small town		26%	=
Rural		14%	=

Regions

East		27%	↑
South		26%	=
Midwest		26%	=
West		21%	=





Trail Running



Trail Running Participation

Total Marketplace

% Currently Participate

6%

% Would Consider

4%

% Potential Participation in Next 2
Years

10%

% Lapsed

8%

Among Participants

% Currently Participate

12%

% Favorite

49%

Frequency of Participation

(Mean # of Times in Past 2 Years)

63.3

% Have Traveled 50 Miles or More to
Participate in Activity

37%

↓

% Have Used an RV When Traveled
50 Miles or More

15%

=

Other Activities Participate In (Top 3)

Backpacking/
Hiking



↑

Bicycling – paved
road



↑

Camping



↑

With Whom Participated (Mean # of Times)

Alone



↑

Family/Friends



=

Organized group



↑

Family only



↑

Friends only

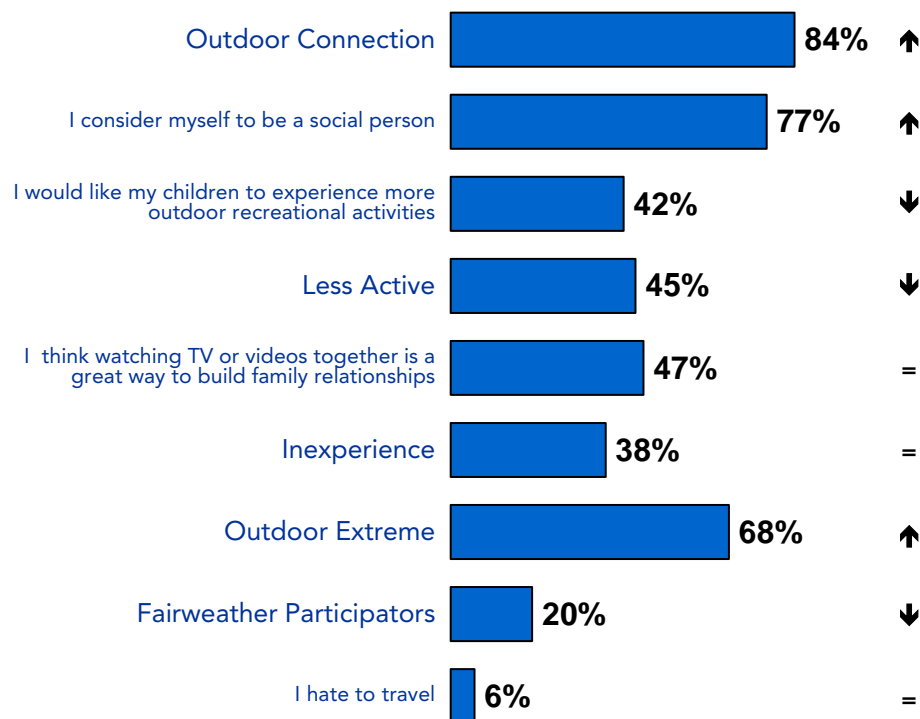


↑

Trail Running Attitudes

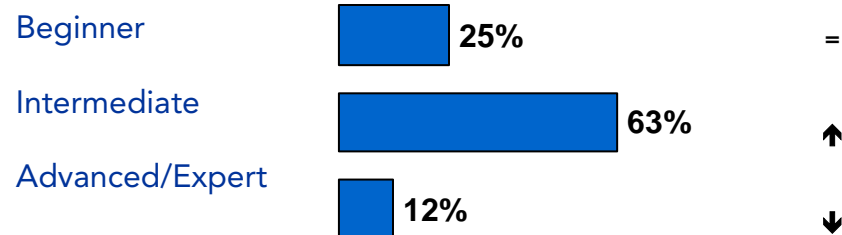
Among Participants

Attitudes (By Factor)



Involvement (Among Those Consider Trail Running Favorite)

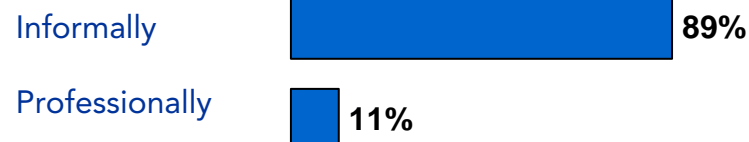
Experience Level Consider Themselves



% Introduced Others to Sport

34% =

Introduced Others to Sport*



*Small base size



Trail Running Lifecycle

Among Participants

Top Influencers To Start Favorite Activity

Friends/peers who were already active in it	44%	=
Friends/peers who wanted to try	37%	=
Parents/guardians/family members	18%	↓
School-related clubs/athletics	15%	↑

Reasons for Stopping Favorite Activity*

General time constraints/ Too busy	43%
School commitments	25%
Lost interest/desire	23%
Location not convenient (i.e. moved/too far to travel)	14%

Reasons for Starting Favorite Activity Again*

Lost weight/Improved physical shape	36%
My friends influenced me	31%
I missed participating in the outdoor activity	23%
I wanted to lose weight	20%

Average Age Start
Favorite Activity

19.5 ↑

Average Age
Stop Favorite Activity*

22.6

28% Stop for
a time period =

72% Never
Stop =

Start Again

Lapsed Indefinitely 58%**

Reasons for Lapsing Indefinitely

Job	34%	↑
Injury	30%	↑
I now participate in other sports/activities	26%	↑
Poor physical shape or health	24%	=

*Small base size

**Based on ever participating in the sport

Trail Running Shopping Behaviors

Among Participants

Apparel

Average Amount Spent Past
2 Years

\$544 ↑

Where Shop

	Have Purchased		Most Often	
Discount stores	50% =		20% ↓	
Sporting good stores	57% =		33% ↑	
Outdoor specialty stores	41% ↑		19% ↑	
Outdoor chain stores	32% =		13% =	
Department stores	27% =		4% =	

Top Reasons Most Often

Has gear/equipment want	<div></div> 50%	↑
Fair price/reasonable	<div></div> 48%	↓
Good quality merchandise	<div></div> 45%	=
Has clothing want/need	<div></div> 44%	=

Equipment

\$724 =

Where Shop

	Have Purchased		Most Often	
Discount stores	52% =		26% ↓	
Sporting good stores	50% ↑		25% =	
Outdoor specialty stores	39% ↑		22% =	
Outdoor chain stores	27% =		13% =	
Department stores	13% ↑		3% =	





Fair price/reasonable	<div></div> 49%	↓
Has gear/equipment want/need	<div></div> 46%	=
Good quality merchandise	<div></div> 40%	=
Good selection	<div></div> 37%	=

Trail Running Characteristics

Among Participants

% Male	60%	=
% White	65%	↓
% Married/Living with partner	33%	↓

Age

16-24		52%	↑
25-34		12%	=
35-44		20%	=
45+		16%	↓
Average age	30.2 years		↓

Household Size

# of Adults in household (mean)	2.4	=
% of Households with children	58%	↑
Average age of children	10.5	=





% Employed	49%	↓
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Median Income	\$65,500	=
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Education

High school graduate or less	43%	=
Completed some college/ College graduate	46%	=
Attended graduate school	11%	=

Where Live

Urban		36%	↑
Suburban		34%	=
Small town		18%	=
Rural		12%	=

Regions

East		22%	=
South		28%	=
Midwest		27%	=
West		23%	=





Climbing



Climbing Participation

Total Marketplace

% Currently Participate

5%

% Would Consider

8%

% Potential Participation in Next
2 Years

13%

% Lapsed

7%

Among Participants

% Currently Participate

9%

% Favorite

66%

Frequency of Participation

(Mean # of Times in Past 2 Years)

7.6

% Have Traveled 50 Miles or More to
Participate in Activity

58%

% Have Used an RV When Traveled
50 Miles or More

11%

Other Activities Participate In (Top 3)

Backpacking/
Hiking



Bicycling – paved
road



Camping



With Whom Participated (Mean # of Times)

Alone



Family/Friends



Organized group



Family only



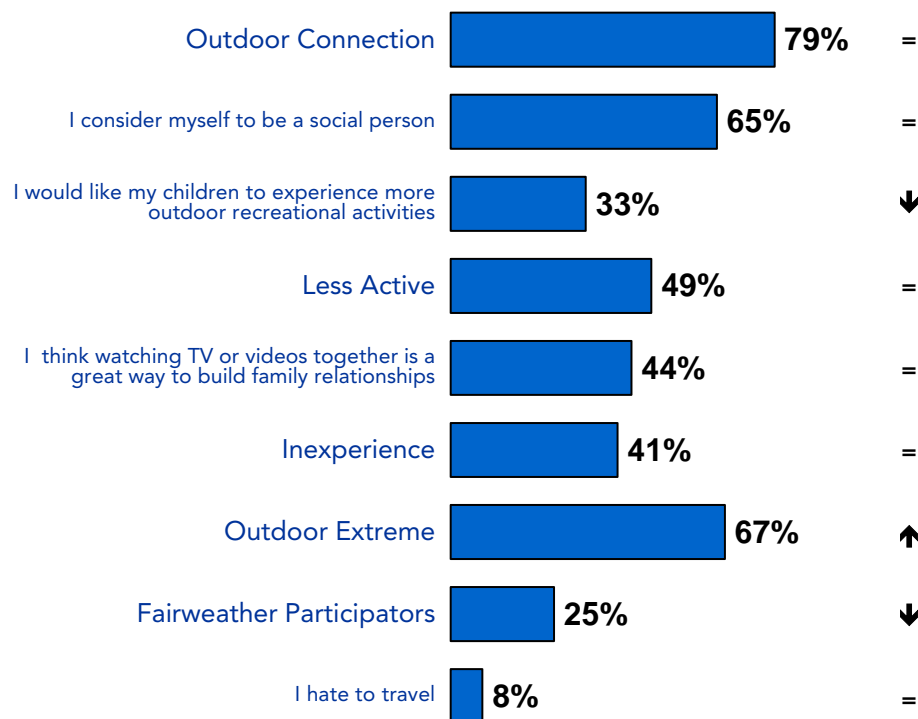
Friends only



Climbing Attitudes

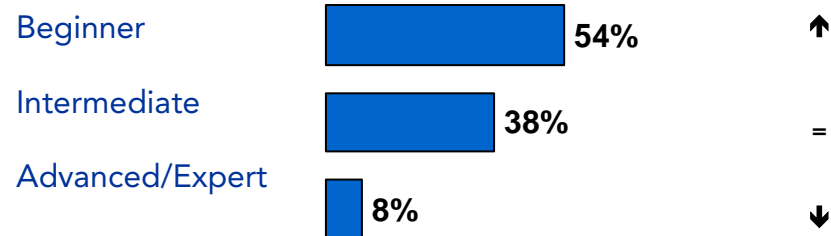
Among Participants

Attitudes (By Factor)



Involvement (Among Those Consider Climbing Favorite)

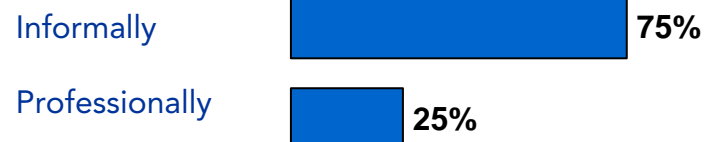
Experience Level Consider Themselves



% Introduced Others to Sport

34%

Introduced Others to Sport*



*Small base size



Climbing Lifecycle

Among Participants

Top Influencers To Start Favorite Activity

Friends/peers who wanted to try	32%	=
Friends/peers who were already active in it	22%	=
School-related clubs/athletics	15%	↑
Personal interest	11%	↑

Reasons for Stopping Favorite Activity*

Injuries/Health reasons	26%
Job got in the way	15%
Family commitments	15%
General time constraints/ Too busy	11%

Reasons for Starting Favorite Activity Again*

My friends influenced me	29%
I missed participating in the outdoor activity	21%
Lost weight/Improved physical shape	10%
No reason	10%

Average Age Start Favorite Activity

19.4 =

Average Age Stop Favorite Activity*

24.9

29% Stop for a time period

71% Never Stop

Start Again

Lapsed Indefinitely 56%**

Reasons for Lapsing Indefinitely

Gained weight	28%	↑
Job	24%	=
Don't know anyone to do it with	23%	=
I now participate in other sports/activities	22%	=

*Small base size

**Based on ever participating in the sport

Climbing Shopping Behaviors

Among Participants

Apparel

Average Amount Spent Past 2 Years

\$570 ↑

Where Shop

Have Purchased

Most Often

Discount stores	40%	↓	16%	↓
Sporting good stores	67%	↑	36%	↑
Outdoor specialty stores	33%	=	14%	=
Outdoor chain stores	44%	=	15%	=
Department stores	26%	↑	8%	=
	=		=	

Top Reasons Most Often

Has gear/equipment want	<div><div></div></div> 60%	↑
Good quality merchandise	<div><div></div></div> 60%	↑
Fair prices/reasonable	<div><div></div></div> 55%	=
Has clothing want/need	<div><div></div></div> 49%	↑

Equipment

\$967 =

Have Purchased

Most Often

Discount stores	41%	↓	21%	↓
Sporting good stores	43%	=	20%	=
Outdoor specialty stores	41%	↑	27%	↑
Outdoor chain stores	32%	↑	14%	↑
Department stores	9%	↑	5%	=
	=			↑





Has gear/equipment want	<div><div></div></div> 60%	↑
Good selection	<div><div></div></div> 49%	↑
Knowledgeable/ Experiences salespeople	<div><div></div></div> 44%	↑
Fair price/reasonable	<div><div></div></div> 43%	↓

Climbing Characteristics

Among Participants

% Male	63%	↑
% White	73%	=
% Married/Living with partner	33%	↓

Age

16-24	 60%	↑
25-34	 14%	=
35-44	 16%	=
45+	 10%	↓
Average age	26.8 years	↓

Household Size

# of Adults in household (mean)	2.3	=
% of Households with children	56%	↑
Average age of children	11.7	↑





% Employed	58%	=
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Median Income	\$61,000	=
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Education

High school graduate or less	52%	↑
Completed some college/ College graduate	40%	↓
Attended graduate school	8%	=

Where Live

Urban	 25%	=
Suburban	 40%	=
Small town	 26%	=
Rural	 9%	↓

Regions

East	 26%	=
South	 27%	=
Midwest	 19%	=
West	 28%	=





Snowshoeing



Snowshoeing Participation

Total Marketplace

% Currently Participate

2%

% Would Consider

3%

% Potential Participation in Next
2 Years

5%

% Lapsed

2%

Among Participants

% Currently Participate

3%

% Favorite

47%

Frequency of Participation

(Mean # of Times in Past 2 Years)

6.8

% Have Traveled 50 Miles or More to
Participate in Activity

54%

% Have Used an RV When Traveled
50 Miles or More

12%

Other Activities Participate In (Top 3)

Backpacking/
Hiking



85% ↑

Paddle sports



59%

↑

Camping



59%

↑

With Whom Participated (Mean # of Times)

Alone



3.4

Family/Friends



0.6

Organized group



0.1

Family only



5.5

Friends only

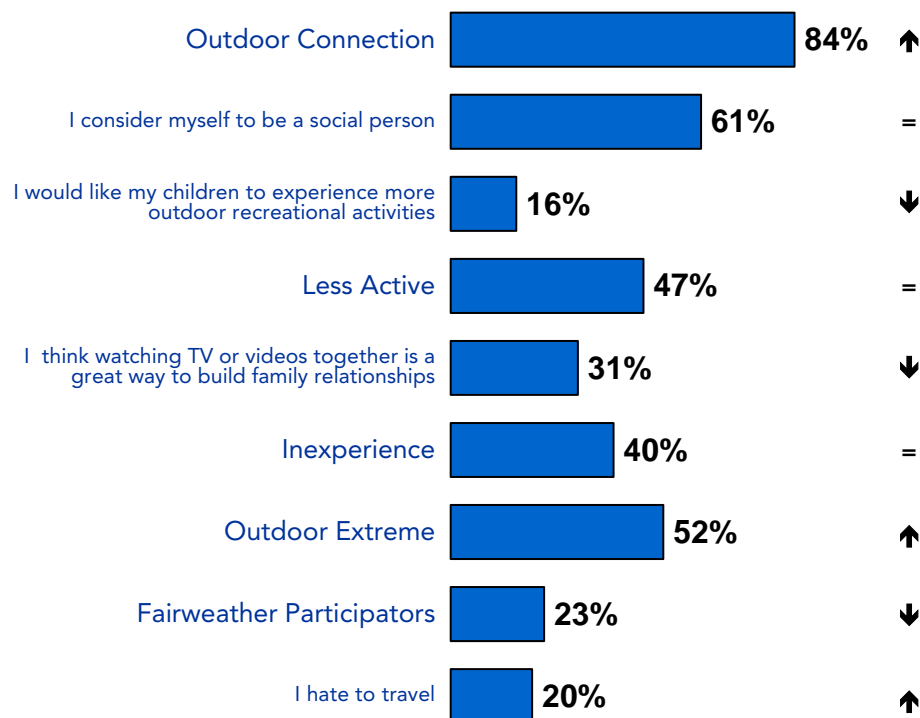


0.7

Snowshoeing Attitudes

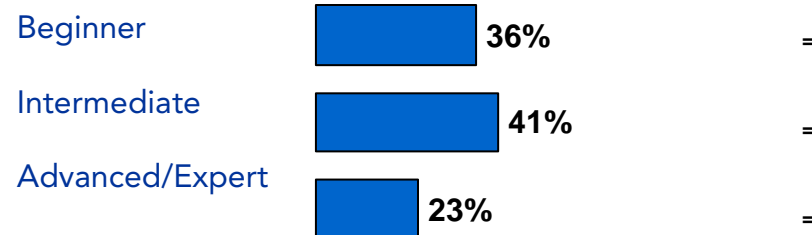
Among Participants

Attitudes (By Factor)



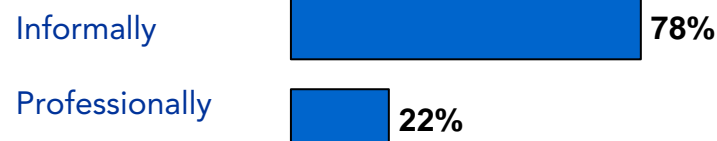
Involvement (Among Those Consider Snowshoeing Favorite)

Experience Level Consider Themselves



% Introduced Others to Sport **42%** =

Introduced Others to Sport*



*Small base size



Snowshoeing Lifecycle

Among Participants

Top Influencers To Start Favorite Activity

Friends/peers who wanted to try	29%	=
Parents/guardians/family members	18%	↓
Boy Scouts programs/camps	10%	=
Media	7%	=

Reasons for Stopping Favorite Activity*

Lost interest/desire	36%
Did other activities	17%
Got married	17%
School commitments	11%

Reasons for Starting Favorite Activity Again*

I missed participating in the outdoor activity	36%
My children were interested	28%
My friends influenced me	15%
My spouse/family member	10%

Average Age Start
Favorite Activity

26.3 ↑

Average Age
Stop Favorite Activity*

26.6

36% Stop for
a time period ↓

64% Never
Stop ↑

Start Again

Lapsed Indefinitely 52%**

Reasons for Lapsing Indefinitely

Don't enjoy the activity anymore	29%	=
Moved/No longer have access to activity	24%	=
Gained weight	18%	=
I now participate in other sports/activities	17%	=

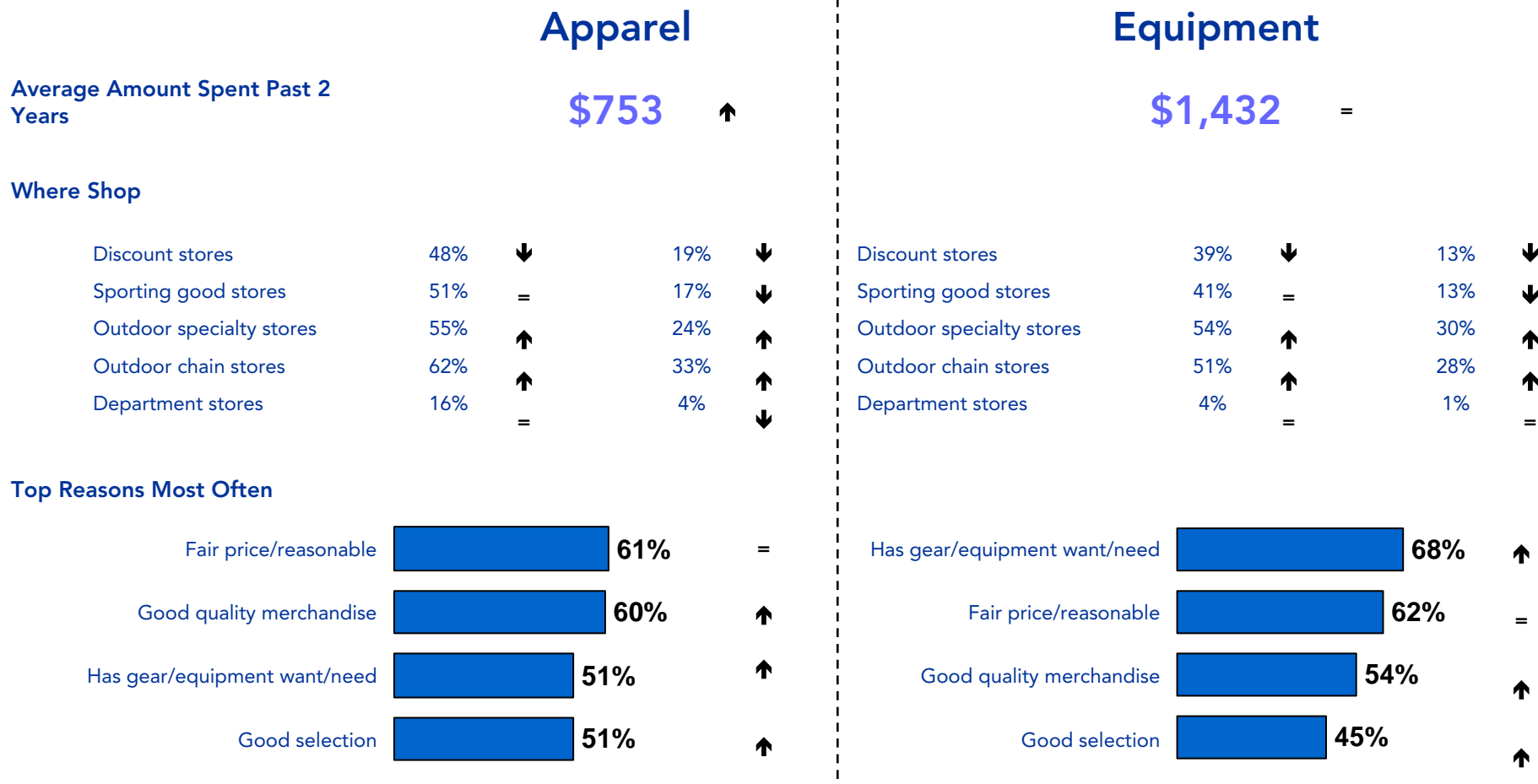
*Small base size

**Based on ever participating in the sport



Snowshoeing Shopping Behaviors

Among Participants







Snowshoeing Characteristics

Among Participants

% Male	59%	=
% White	85%	↑
% Married/Living with partner	58%	=

Age

16-24	 12%	↓
25-34	 17%	=
35-44	 23%	=
45+	 48%	↑

Average age 42.5 years ↑

Household Size

# of Adults in household (mean)	2.0	↓
% of Households with children	35%	↓
Average age of children	10.4	=





% Employed 74% ↑

Median Income \$60,000 ↑





Education

High school graduate or less	16%	↓
Completed some college/		
College graduate	48%	=
Attended graduate school	36%	↑

Where Live

Urban	 23%	=
Suburban	 22%	↓
Small town	 29%	=
Rural	 26%	↑

Regions

East	 34%	↑
South	 8%	↓
Midwest	 19%	↓
West	 39%	↑





Snowboarding/Downhill Skiing



Snowboarding/Downhill Skiing Participation

Total Marketplace

% Currently Participate	7%	}	% Potential Participation in Next 2 Years	19%	% Lapsed
% Would Consider	12%				

Among Participants

% Currently Participate	13%	Frequency of Participation (Mean # of Times in Past 2 Years)	10.7
% Favorite	85%	% Have Traveled 50 Miles or More to Participate in Activity	83% ↑
		% Have Used an RV When Traveled 50 Miles or More	3% ↓

Other Activities Participate In (Top 3)

Backpacking/ Hiking	62%	↑
Bicycling – paved road	57%	↑
Camping	54%	↑

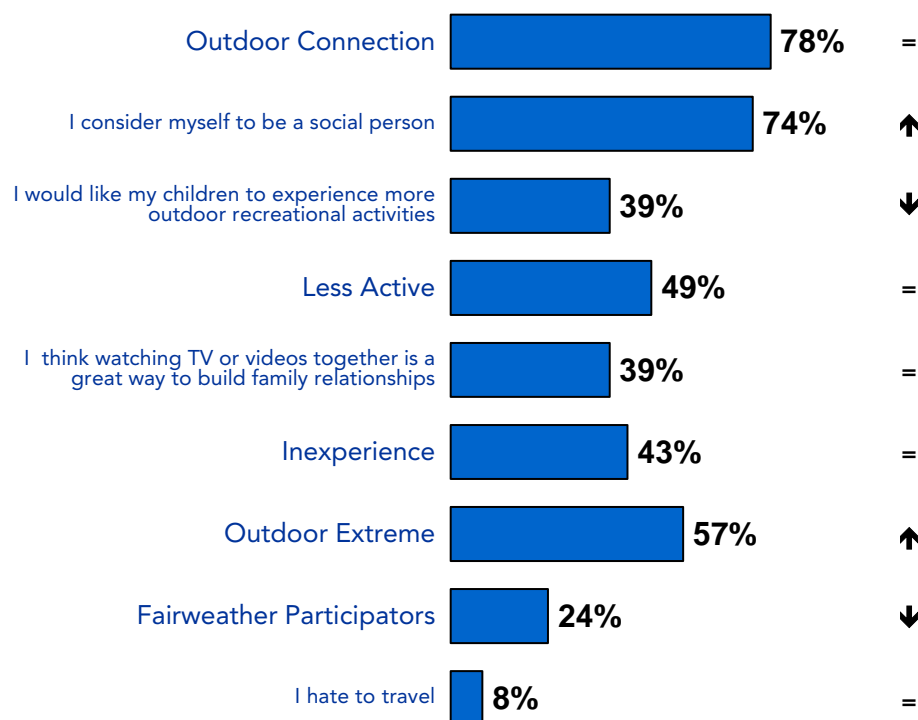
With Whom Participated (Mean # of Times)

Alone	1.1	↓
Family/Friends	1.3	=
Organized group	0.8	=
Family only	3.3	=
Friends only	5.3	=

Snowboarding/Downhill Skiing Attitudes

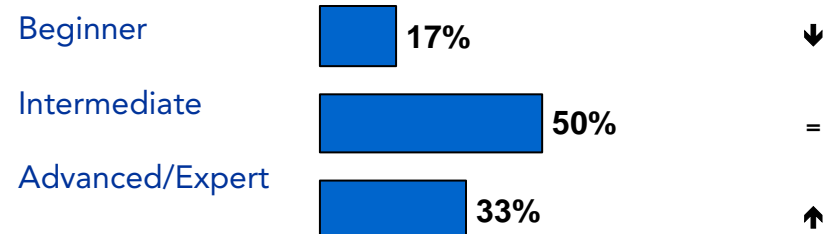
Among Participants

Attitudes (By Factor)



Involvement (Among Those Consider Snowboarding/Downhill Skiing Favorite)

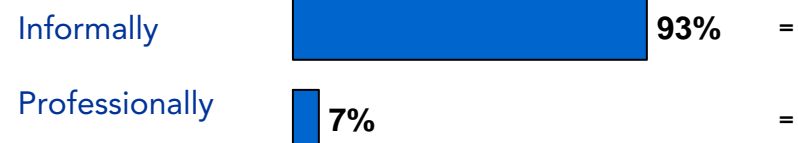
Experience Level Consider Themselves



% Introduced Others to Sport

54% ↑

Introduced Others to Sport



Snowboarding/Downhill Skiing Lifecycle

Among Participants

Top Influencers To Start Favorite Activity		
Friends/peers who wanted to try	44%	↑
Friends/peers who were already active in it	43%	↑
Parents/guardians/family members	35%	=
School-related clubs/activities	15%	↑

Reasons for Stopping Favorite Activity		
General time constraints/Too busy	26%	=
Money issues	25%	↑
Location not convenient (i.e. moved/ too far to travel)	20%	=
No opportunity	6%	↑

Reasons for Starting Favorite Activity Again		
I missed participating in the outdoor activity	47%	=
My friends influenced me	40%	↑
My children were interested	20%	=
I now have more money to invest in it	11%	↑

Average Age Start
Favorite Activity

17.1 =

Average Age
Stop Favorite Activity

23.7 =

38% Stop for
a time period

62% Never
Stop

Start Again

Lapsed Indefinitely 54%**

Reasons for Lapsing Indefinitely		
Access/entrance fees are too expensive	35%	↑
Lack of necessary gear/equipment	29%	↑
Gear/apparel too expensive	28%	↑
I now participate in other sports/ activities	23%	=

**Based on ever participating in the sport

Snowboarding/Downhill Skiing Shopping Behaviors

Among Participants

Average Amount Spent Past
2 Years

Apparel

\$587 ↑

Where Shop

Discount stores	38%	↓	12%	↓
Sporting good stores	66%	↑	39%	↑
Outdoor specialty stores	46%	↑	23%	↑
Outdoor chain stores	48%	↑	18%	↑
Department stores	21%	=	5%	=

Top Reasons Most Often

Has gear/equipment want/need	<div><div></div></div> 50%	↑
Good selection	<div><div></div></div> 47%	↑
Fair price/reasonable	<div><div></div></div> 47%	=
Has good quality merchandise	<div><div></div></div> 45%	=

Equipment

\$1,004 =

Discount stores	39%	↓	15%	↓
Sporting good stores	50%	↑	27%	↑
Outdoor specialty stores	45%	↑	32%	↑
Outdoor chain stores	33%	↑	15%	=
Department stores	8%	=	2%	=





Has gear/equipment want/need	<div><div></div></div> 53%	↑
Fair price/reasonable	<div><div></div></div> 45%	↓
Good selection	<div><div></div></div> 42%	↑
Has good quality merchandise	<div><div></div></div> 40%	=

Snowboarding/Downhill Skiing Characteristics

Among Participants

% Male	63%	↑
% White	79%	=
% Married/Living with partner	47%	↓

Age

16-24	 40%	↑
25-34	 18%	=
35-44	 18%	=
45+	 24%	↓

Average age 32.4 years ↓

Household Size

# of Adults in household (mean)	2.3	=
% of Households with children	51%	=
Average age of children	10.5	=





% Employed 65% =

Median Income \$76,200 ↑





Education

High school graduate or less	32%	=
Completed some college/ College graduate	52%	=
Attended graduate school	16%	↑

Where Live

Urban	 30%	=
Suburban	 35%	=
Small town	 25%	=
Rural	 10%	↓

Regions

East	 23%	=
South	 22%	=
Midwest	 18%	↓
West	 37%	↑





Appendix



Reasons For Stopping Activity*

	General Population						
	Total (5660) %	Back-packing/ Hiking (910) %	Bicycling paved road (1670) %	Bicycling – off road (506) %	Bird watching (78) %	X- country/Nordic/ Telemark skiing (99) %	Fly fishing (116) %
Time Commitments (net)	43	47	41	51	43	35	39
Job		22	25	21	30	15	22
Time commitments with children	18	20	17	23	21	21	13
Time commitments for home improvement/ repair/maintenance	14	16	13	12	15	14	18
Time commitments for school	8	8	8	10	9	9	3
Time commitments for elder care	3	4	2	5	2	3	6
Lack of necessary gear/equipment	22	11	28	21	4	21	23
Poor physical shape or health	20	26	21	23	14	16	20
Don't enjoy the activity anymore	19	12	23	19	18	22	15
I now participate in other sports/activities	19	22	16	19	29	17	11
Don't know anyone to do it with	16	18	12	19	16	14	19
Gained weight	15	18	16	18	13	6	3
Injury	11	15	9	14	1	11	4
Moved/no longer have access to activity	11	13	8	14	11	22	12
Gear/apparel for activity is too expensive	8	6	5	7	3	14	6
Volunteer organizations	3	2	3	2	6	9	1
It seems too dangerous or extreme	5	2	7	5	1	2	1
Access/entrance fees are too expensive	4	2	-	2	4	3	9
Other	7	5	4	7	1	6	13
Still participated when I can (volunteered)	1	-	1	1	-	-	-
Other time commitments (volunteered)	1	-	1	-	1	-	-

*Among those who lapsed for any activity

Reasons For Stopping Activity* (continued)

	General Population						
	Total (5660) %	Camping (945) %	Paddle sports (597) %	Trail running (208) %	Climbing (161) %	Snowshoeing (36) %	Snowboarding /Downhill skiing (334) %
Time Commitments (net)	43	41	44	49	48	10	39
Job	22	19	21	34	24	5	16
Time commitments with children	18	16	19	15	18	5	21
Time commitments for home improvement/ repair/maintenance	14	14	16	16	9	4	13
Time commitments for school	8	7	8	12	15	2	9
Time commitments for elder care	3	4	2	1	1	-	-
Lack of necessary gear/equipment	22	24	32	1	20	14	29
Poor physical shape or health	20	14	11	24	21	13	19
Don't enjoy the activity anymore	19	27	9	19	16	29	15
I now participate in other sports/activities	19	17	23	26	22	17	23
Don't know anyone to do it with	16	15	24	12	23	8	18
Gained weight	15	8	12	16	28	18	14
Injury	11	4	5	30	17	5	19
Moved/no longer have access to activity	11	5	19	9	16	24	13
Gear/apparel for activity is too expensive	8	9	13	3	10	1	28
Volunteer organizations	3	4	3	-	7	16	2
It seems too dangerous or extreme	5	2	4	3	11	11	10
Access/entrance fees are too expensive	4	5	5	-	3	-	35
Other	7	12	7	9	4	3	8
Still participated when I can (volunteered)	1	1	1	-	-	-	-
Other time commitments (volunteered)	1	-	2	-	-	-	1

*Among those who lapsed for any activity

Reasons Why First Participated in Lapsed Activity*

	General Population				
	Total (5660) %	Age 16-24 (708) %	Age 25-34 (977) %	Age 35-44 (1339) %	Age 45+ (2628) %
Friends/peers who were already active in it	36	30	35	38	37
Parents/Guardians/Family members encouraged me	33	42	38	31	30
Friends/peers who also wanted to try it	28	29	25	25	30
Boy Scouts programs, camps	13	7	9	12	15
School-related clubs/athletics	9	9	11	11	8
Church group or other religious organization	9	9	8	7	10
Girl Scouts programs, camps	8	6	7	8	9
Parents/Guardians/Family members forced me	7	12	8	6	4
Camp Fire programs, camps	4	5	4	3	5
Other non-affiliated camps (for example, not affiliated with organizations such as Scouts, YMCA, etc.)	4	5	3	2	4
Boys & Girls Clubs programs, camps	3	3	2	1	4
Books	3	2	4	2	3
Movies	3	3	3	3	2
YMCA/YWCA programs, camps	3	2	2	2	3

*Among those who lapsed for any activity



Reasons Why First Participated in Lapsed Activity* (continued)

	General Population				
	Total (5660) %	Age 16-24 (708) %	Age 25-34 (977) %	Age 35-44 (1339) %	Age 45+ (2628) %
Community organization/club not affiliated with school –Rainbow Girls, Mountaineering clubs, etc.	2	3	2	1	1
Local gym, gym-sponsored events or programs, including indoor climbing center	2	2	2	2	1
Media – newspaper, magazine, Internet, etc	2	2	2	1	1
Outdoor educational programs such as Outward Bound	1	1	1	1	-
A Sports icon	-	1	1	-	-
Retailer-sponsored events, such as a local sporting good store clinic or race	-	1	1	1	-
Personal interest (volunteered)	2	4	2	1	2
Transportation (volunteered)	2	1	-	2	3
Other†	7	4	7	6	9

*Among those who lapsed for any activity

†Currently examining the "Other specify" verbatim comments for the Non qualified respondents. The "Other Specifies" for the qualified have already been incorporated into the results.

Reasons Why First Participated in Lapsed Activity*

	General Population						
	Total (5660) %	Back-packing/ Hiking (net) (910) %	Bicycling paved road (1670) %	Bicycling – off road (506) %	Bird watching (78) %	X- country/Nordic/ Telemark skiing (net) (99) %	Fly fishing (116) %
Friends/peers who were already active in it	36	27	50	46	21	19	31
Parents/Guardians/Family members encouraged me	33	26	37	26	34	17	52
Friends/peers who also wanted to try it	28	24	30	40	15	25	15
Boy Scouts programs, camps	13	24	3	7	22	7	8
School-related clubs/athletics	9	14	4	8	26	24	3
Church group or other religious organization	9	16	2	9	10	12	6
Girl Scouts programs, camps	8	13	5	7	11	10	-
Parents/Guardians/Family members forced me	7	7	5	4	3	6	11
Camp Fire programs, camps	4	9	2	2	10	7	1
Other non-affiliated camps (for example, not affiliated with organizations such as Scouts, YMCA, etc.)	4	6	-	4	9	2	2
Boys & Girls Clubs programs, camps	3	6	1	4	2	2	2
Books	3	4	1	5	29	2	14
Movies	3	2	2	5	1	2	9
YMCA/YWCA programs, camps	3	4	1	5	3	6	-

*Among those who lapsed for any activity





Reasons Why First Participated in Lapsed Activity* (continued)

	General Population						
	Total (5660) %	Back-packing/ Hiking (net) (910) %	Bicycling paved road (1670) %	Bicycling – off road (506) %	Bird watching (78) %	X- country/Nordic/ Telemark skiing (net) (99) %	Fly fishing (116) %
Community organization/club not affiliated with school –Rainbow Girls, Mountaineering clubs, etc.	2	1	-	1	3	8	8
Local gym, gym-sponsored events or programs, including indoor climbing center	2	3	1	4	1	5	5
Media – newspaper, magazine, Internet, etc.	2	1	1	3	9	8	9
Outdoor educational programs such as Outward Bound	1	1	-	1	3	2	1
A Sports icon	-	-	-	-	-	5	4
Retailer-sponsored events, such as a local sporting good store clinic or race	-	-	-	1	1	2	1
Personal interest (volunteered)	2	1	3	5	-	2	4
Transportation (volunteered)	2	-	5	1	-	-	-
Other †	7	8	8	10	9	4	3

*Among those who lapsed for any activity

†Currently examining the "Other specify" verbatim comments for the Non qualified respondents. The "Other Specifies" for the qualified have already been incorporated into the results.



Reasons Why First Participated in Lapsed Activity* (continued)

	General Population						
	Total (5606) %	Camping (945) %	Paddle sports (net) (597) %	Trail running (208) %	Climbing (161) %	Snowshoeing (36) %	Snowboarding /Downhill skiing (net) (334) %
Friends/peers who were already active in it	36	23	27	22	32	10	42
Parents/Guardians/Family members encouraged me	33	44	30	17	18	15	28
Friends/peers who also wanted to try it	28	22	33	24	37	6	27
Boy Scouts programs, camps	13	22	19	19	13	19	3
School-related clubs/athletics	9	7	6	37	12	7	23
Church group or other religious organization	9	14	13	6	6	9	7
Girl Scouts programs, camps	8	14	9	5	8	7	2
Parents/Guardians/Family members forced me	7	12	5	3	8	5	5
Camp Fire programs, camps	4	5	5	3	7	16	-
Other non-affiliated camps (for example, not affiliated with organizations such as Scouts, YMCA, etc.)	4	5	7	3	7	-	-
Boys & Girls Clubs programs, camps	3	3	2	4	6	1	1
Books	3	2	2	4	3	6	2
Movies	3	3	2	2	3	1	5
YMCA/YWCA programs, camps	3	3	4	4	3	-	2

*Among those who lapsed for any activity



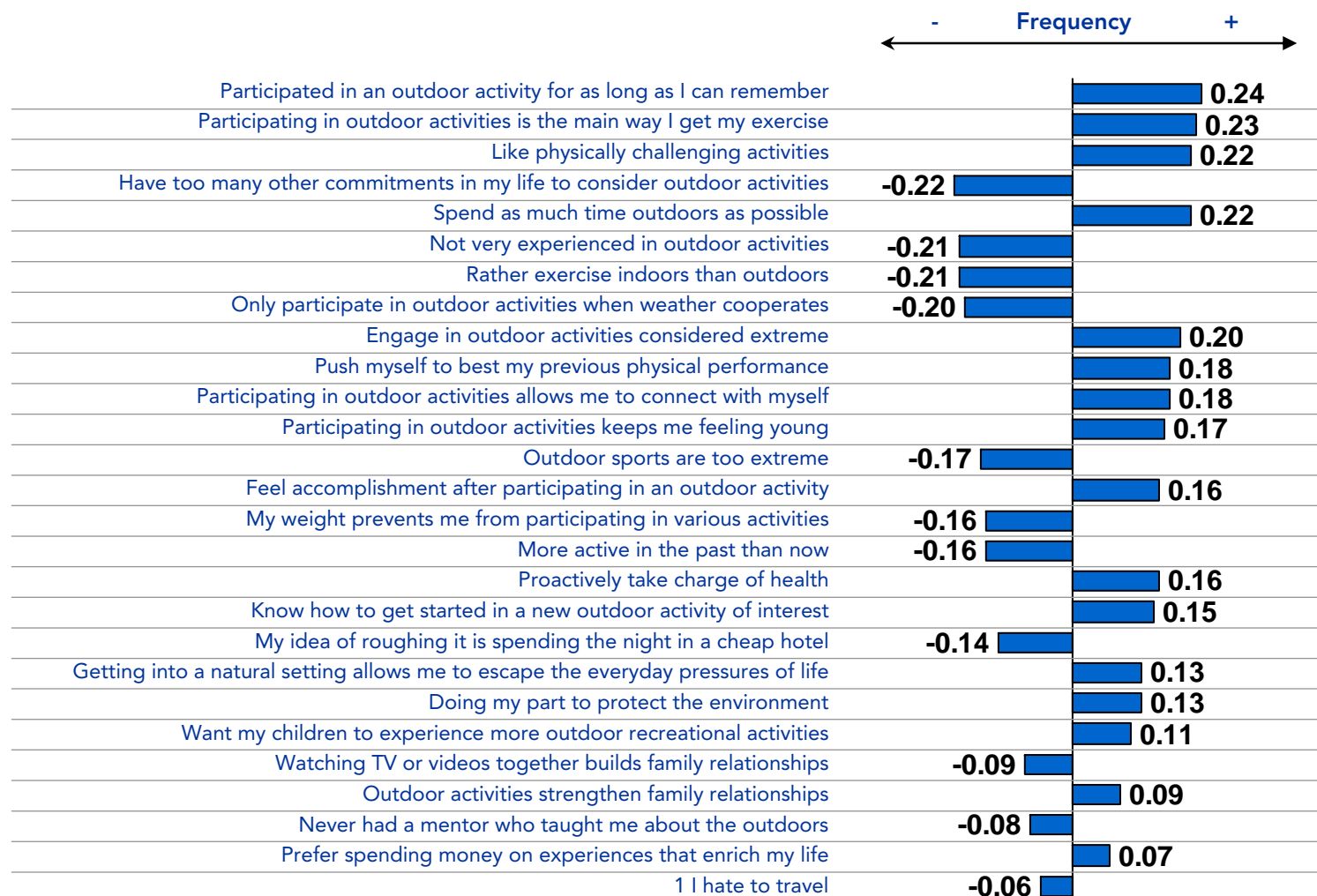
Reasons Why First Participated in Lapsed Activity* (continued)

	General Population						
	Total (5606) %	Camping (945) %	Paddle sports (net) (597) %	Trail running (208) %	Climbing (161) %	Snowshoeing (36) %	Snowboarding /Downhill skiing (net) (334) %
Community organization/club not affiliated with school –Rainbow Girls, Mountaineering clubs, etc.	2	4	1	-	7	-	2
Local gym, gym-sponsored events or programs, including indoor climbing center	2	-	1	3	5	-	1
Media – newspaper, magazine, Internet, etc	2	1	1	-	1	5	2
Outdoor educational programs such as Outward Bound	1	1	1	-	3	3	1
A Sports icon	-	-	-	-	-	-	2
Retailer-sponsored events, such as a local sporting good store clinic or race	-	-	-	-	1	-	2
Personal interest (volunteered)	2	1	-	1	3	1	2
Transportation (volunteered)	2	-	-	1	-	3	-
Other †	7	1	5	17	13	45	7

*Among those who lapsed for any activity

†Currently examining the "Other specify" verbatim comments for the Non qualified respondents. The "Other Specifies" for the qualified have already been incorporated into the results.

Attitudinal Correlations to Frequency*



*Any significant attitudes are mentioned.

Attitudinal Correlations to Spending

