

A Targeted Look At Participants With Potential

July 2004



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.

OIA would like to thank it's members for contributing to OIF's outreach initiatives with special thanks to Outdoor Retailer and REI for their extremely generous contributions of time and money.

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Background and Objectives

This report provides a more detailed look at the target markets identified by the key findings in OIF's *Exploring the Active Lifestyle* report.

Key Findings

- ★ Well over half of the US population participates in at least one outdoor activity
- ★ 8 out of 10 current participants are interested in new activities
- ★ A quarter of those who are currently NOT participating in human powered activities show an interest in participating in the next 2 years
- ★ The youngest age group is key to building participation in the future
- ★ Other potential targets mentioned in the report were Hispanics, Females and 45+ Singles

The populations described in this report have been segmented to reflect these key findings – Strivers, Achievers, and Experienced.

Also included is a profile of each activity's demographic profile, projected lifetime spending summaries for each activity and top five target activities for growing your business.

Opportunities For Growth

Achievers – Current Participants who are interested in starting a new activity.

Strivers – Non Participants who are interested in starting an outdoor activity.

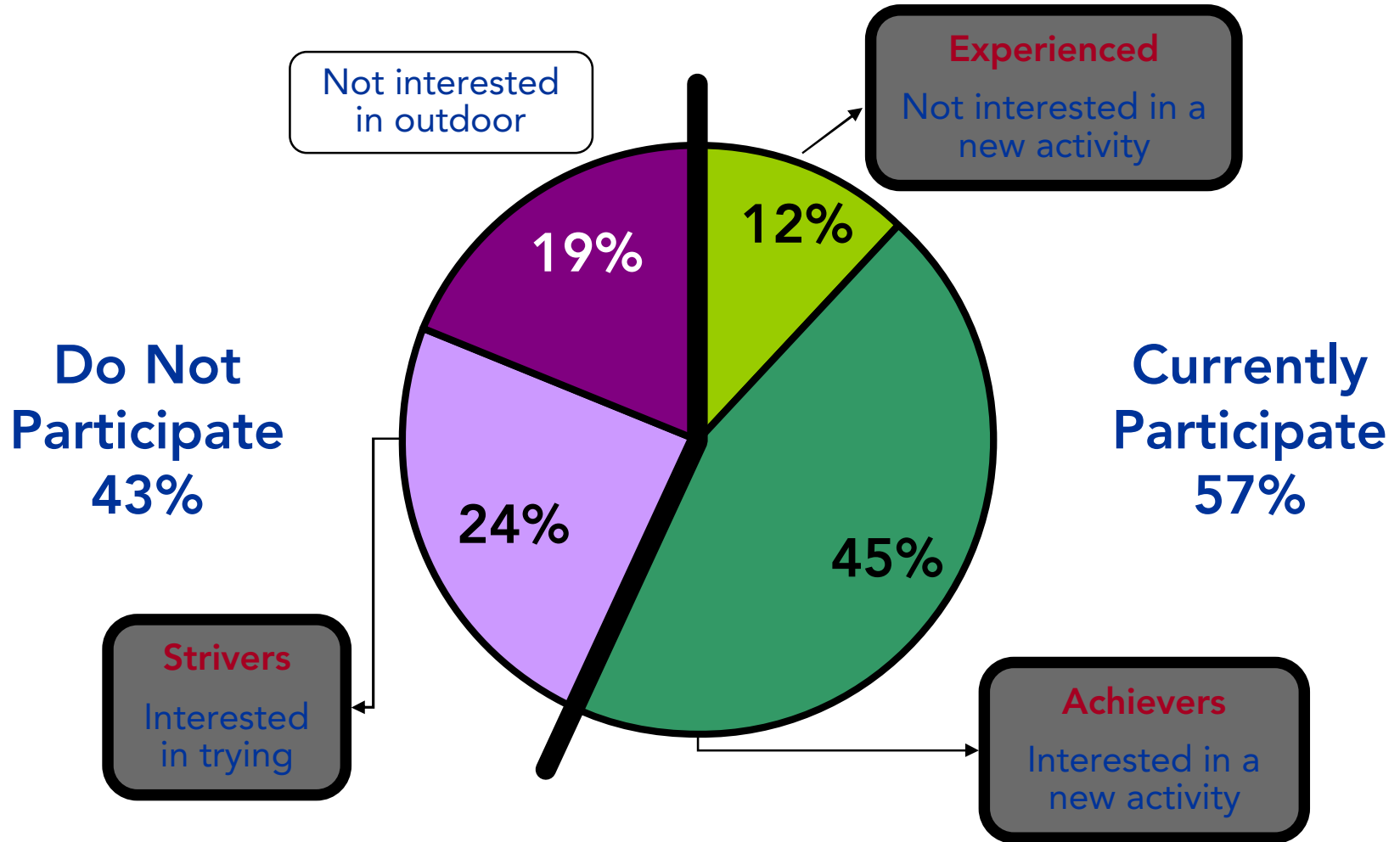
Experienced - Participants who don't plan to start something new.

Not surprisingly, the Achiever group reflects the profile of the **Experienced** (current participants) in general.

By contrast, **Strivers**, skew:

- ✧ Somewhat older – particularly in the 45+ set
- ✧ Female, less likely to have children, but just as likely to be married
- ✧ Less educated, with lower median income

Potential Interest In New Activities: 81%



*Base: General Population

Which Activities Are Achievers and Strivers Interested In Trying?

Strivers are most likely to be interested in the “gateway activities” that got the **Experienced** their start:

- ★ Paved road cycling (43%)
- ★ Camping (tent) (41%)
- ★ Hiking (31%)
- ★ Paddlesports (25%)

By contrast, the **Achievers** are more likely to be adding to their current activities, creating cross-selling opportunities against the activities they participate in most which are bicycling (paved) – 50%; hiking – 47%; and camping – 47%:

- ★ Paddlesports (50%)
- ★ Hiking or backpacking (40%)
- ★ Bicycling either paved (21%) or mountain (18%)
- ★ Downhill skiing (16%) or snowboarding (14%)

Those Interested in New Activities Respondent Demographic Profile

	Total <u>Interested</u> (5326)	Non-Participants <u>Strivers</u> (1880)	Participants <u>Achievers/Experienced</u> (3447)
Age			
16-24	19%	14%	22%
25-34	18%	16%	20%
35-44	24%	24%	26%
45+	39%	46%	32%
Average Age	39.2 years	43.0 years	38.3 years
Gender			
Male	49%	40%	53%
Female	51%	60%	47%
Race			
White	76%	75%	77%
Hispanic	13%	13%	14%
African American	3%	5%	3%
Other	8%	7%	6%
Education			
High School or Less	42%	50%	36%
Some College	30%	27%	32%
4 Year Degree +	28%	23%	32%
Employed	73%	68%	74%

Those Interested in New Activities

Respondent Demographic Profile (continued)

	Total <u>Interested</u>	Non-Participants <u>Strivers</u>	Participants <u>Achievers/Experienced</u>
	(5326)	(1880)	(3447)
Married/Living with Partner	60%	62%	59%
Average # of Adults in Household	2.2	2.1	2.2
Have Children	47%	43%	49%
Average Age of Children	10.1 years	9.9 years	10.2 years
Median Household Income	\$62,560	\$42,500	\$62,500
Type of Area Live			
Urban/City	28%	27%	28%
Suburban	31%	31%	31%
Small Town	45%	46%	45%
Rural	21%	22%	21%

Lifetime Spending by Activity

Just as some activities possess more potential from the standpoint of VOLUME of participants, others are more lucrative when it comes to PER PARTICIPANT expenditures for apparel and equipment.

When you combine the volume and per participant expenditure, the top 5 target activities (based on highest lifetime expenditures per participant coupled with the highest expected level of participation) are notably the same for both equipment and apparel. These 5 activities show the most potential for increased spending in the next 2 years.

- ★ Road cycling
- ★ Camping
- ★ Hiking
- ★ Rafting
- ★ Backpacking

Breakdown of Lifetime Equipment Spending Per Activity

Equipment *	% Participation	Rank as Target
Fly fishing (\$10,518)	12%	
Rafting (\$9,200)	20%	4
CC/Nordic (\$7,603)	7%	
Downhill (\$6,837)	15%	
Canoeing (\$5,871)	15%	
Hiking (\$5,574)	43%	3
Road Biking (\$5,485)	48%	1
Camping (\$5,417)	47%	2
Climbing (\$5,377)	13%	
Snowboarding (\$4,776)	10%	
Snowshoeing (\$4,276)	5%	
Backpacking (\$4,276)	22%	5
Bird Watching (\$4,026)	13%	
Mountain Biking (\$3,987)	20%	
Trail Running (\$3,191)	10%	

* Projected lifetime spending on equipment from age 16-24, not adjusted for multiple activities.

Breakdown of Lifetime Apparel Spending Per Activity

Apparel	% Participation	Rank as Target
Fly Fishing (\$5,258)	12%	
Downhill skiing (\$5,118)	15%	
Rafting (\$3,997)	20%	4
Road Biking (\$3,647)	48%	1
Trail Running (\$3,234)	10%	
Snowshoeing (\$3,120)	5%	
Backpacking (\$3,120)	22%	5
CC/Nordic Skiing (\$3,053)	7%	
Camping (\$3,001)	47%	2
Snowboarding (\$2,770)	5%	
Kayaking (\$2,756)	16%	
Hiking (\$2,729)	43%	3
Climbing (\$2,582)	13%	
Canoeing (\$2,527)	15%	
Bird Watching (\$2,415)	13%	

* Projected lifetime spending on apparel from age 16-24, not adjusted for multiple activities.

More Potential When Starting Young

For the activities that generate the most current and expected participation, the **projected lifetime expenditures**** for apparel and equipment among those who started participating at the 16-24 age range versus those starting at later ages can be projected as follows:

	16-24	25-34	35-44	45+
Camping (tent)	\$8,419	\$7,664	\$6,854	\$3,970
% participate*	62%	61%	57%	32%
Bicycling (paved road)	\$9,133	\$8,342	\$5,664	\$5,359
% participate	59%	58%	52%	40%
Hiking	\$8,304	\$7,620	\$6,410	\$4,685
% participate	49%	51%	48%	36%

*Past 2 year and next 2 year participation

**Based on average expenditures for all activities – not adjusted for multiple activities

Youth, Hispanics, 45+ Singles, Females

Youth – Age 16- 24

- ★ Among the youth (16-24 year olds) population in the US, two-thirds currently have participated in a human-powered activity in the past 2 years and they account for 1 in 5 of those interested in trying a new activity in the next 2 years.
- ★ This group tends to participate more often in the more challenging activities (climbing, trail running, downhill skiing and snowboarding), with 3.5 being the average number of activities, and 2.7 times per month participation level per activity.
- ★ Keeping the 16-24 year old engaged and expanding their base of activities is key to a lifetime of continued expenditures.

14% Strivers

22% Achievers/Experienced

Youth Participation Any Outdoor Activities

Total Marketplace

% Currently Participate	67%	}	% Potential Participation in Next 2 Years	89%
% Would Consider	22%			

Among Participants

% Currently Participate	100%
Mean # of Activities	3.5

Frequency of Participation
(Mean # of Times in Past 2 Years) 64.4

% Have Traveled 50 Miles or More to
Participate in Activity 54%

% Have Used an RV When Traveled
50 Miles or More 7%

Favorite Activities Participate In (Top 4)

Camping	42%
Road Biking	41%
Backpacking/Hiking	36%
Paddle sports	31%

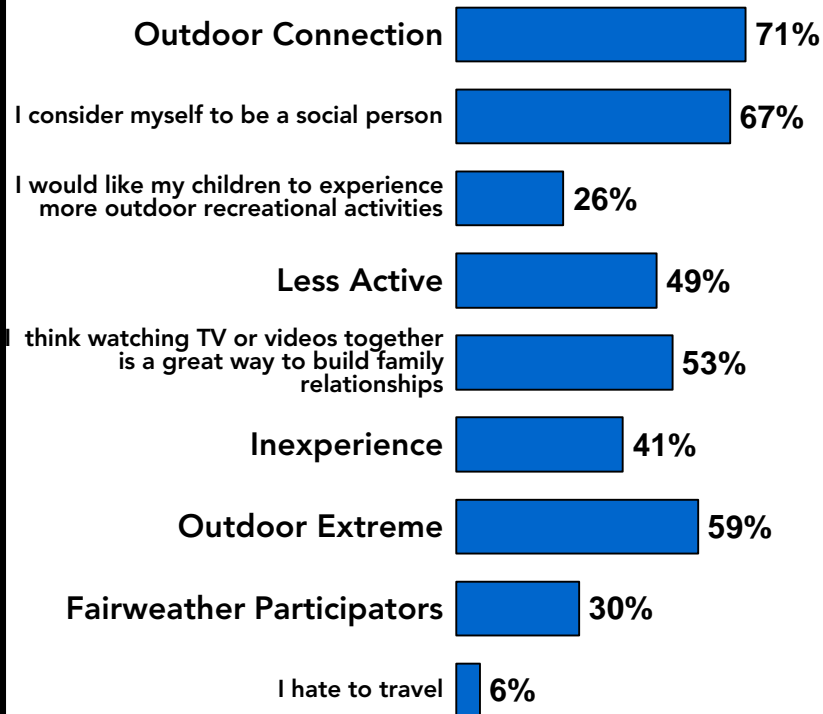
With Whom Participated (Mean # of Times)

Alone	2.6
Family/Friends	0.5
Organized group	0.6
Family only	0.7
Friends only	2.6

Youth Attitudes

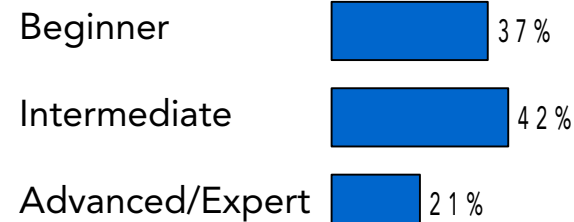
Among Participants

Attitudes (By Factor)



Involvement

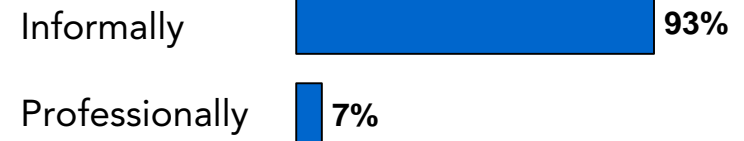
Experience Level Consider Themselves



% Introduced Others to Sport

28%

Introduced Others to Sport



Youth Lifecycle

Among Participants

Top Influencers To Start Any Activity

Parents/guardians/family members	36%
Friends/peers who also wanted to try	36%
Friends/peers who were already active in it	31%
Boy Scout/Girl Scout programs	14%
School – related clubs/athletics	12%
Church groups	11%

Reasons for Stopping Any Activity

General time constraint/too busy	26%
Lost Interest	18%
Location not convenient (i.e. moved/too far to travel)	13%

Reasons for Starting Any Activity Again

My friends influenced me	30%
I missed participating in the outdoor activity	23%
School/Church/School activity	12%
I want to lose weight	7%

**Based on ever participating in the sport

Youth Shopping Behaviors

Among Participants

Average Amount Spent Past
2 Years

Apparel

\$265

Where Shop	Have Purchased	Most Often
Sporting good stores	56%	33%
Discount stores	46%	27%
Outdoor specialty stores	27%	10%
Department stores	26%	10%
Outdoor chain stores	25%	10%

Top Reasons Most Often

Fair price/reasonable	<div><div></div></div> 51%
Has clothing want/need	<div><div></div></div> 47%
Has gear/equipment want/need	<div><div></div></div> 45%
Has brands want	<div><div></div></div> 45%
Good quality	<div><div></div></div> 43%

Equipment

\$296 =

	Have Purchased	Most Often
Discount stores	49%	29%
Sporting good stores	43%	30%
Outdoor specialty stores	28%	13%
Outdoor chain stores	24%	11%
Department stores	12%	3%

Fair price/reasonable	<div><div></div></div> 59%
Has gear/equipment want/need	<div><div></div></div> 59%
Good quality merchandise	<div><div></div></div> 52%
Convenient location	<div><div></div></div> 50%
Good selection/variety	<div><div></div></div> 37%

Youth Characteristics

Among Participants

% Male 49%
 % White 63%
 % Married/Living with partner 14%

Household Size

of Adults in household (mean) 2.9
 % of Households with children 55%
 Average age of children 12.4

Education

High school graduate or less 67%
 Completed some college 27%
 College graduate + 6%

% Employed 30%

Where Live

Urban 27%
 Suburban 34%
 Small town 30%
 Rural 8%

Regions

East 19%
 South 28%
 Midwest 23%
 West 29%

Hispanics

While current participation is lower among non-Caucasians, there is growing interest in human powered activities among ethnic groups – particularly *Hispanics*. With unprecedented levels of growth in this population in the US, this group will make up a larger proportion of participants in human powered activities as they become more acculturated. The potential for this group participating in human powered activities in the next 2 years stands at 85%.

- ✧ The profile of Hispanic participants suggests that they skew younger, have a lower level of education, and have lower income and urban.
- ✧ Among younger Hispanic participants, there is above average interest in trying tent camping, paddle sports, cycling, climbing and snowboarding.

13% Strivers

14% Achievers/Experienced

Hispanic Participation Any Outdoor Activities

Total Marketplace

% Currently Participate	65%	} % Potential Participation in Next 2 Years	85%
% Would Consider	20%		

Among Participants

% Currently Participate	100%
Mean # of Activities	2.7

Frequency of Participation
(Mean # of Times in Past 2 Years) 72.3

% Have Traveled 50 Miles or More to
Participate in Activity 49%

% Have Used an RV When Traveled
50 Miles or More 11%

Favorite Activities Participate In (Top 4)

Bicycling/Paved Road	44%
Camping	44%
Backpacking/Hiking	39%
Paddle sports	24%

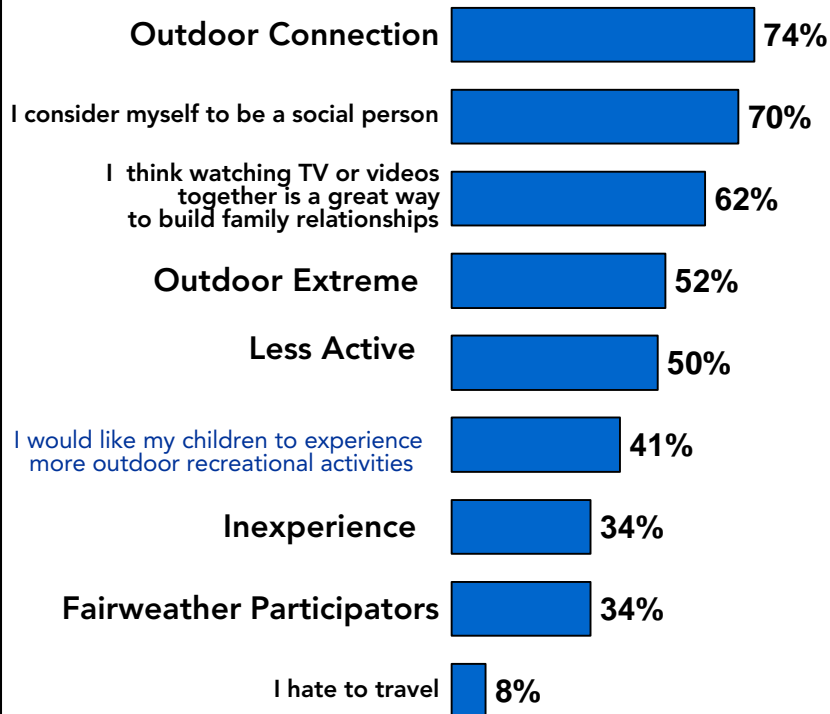
With Whom Participated (Mean # of Times)

Alone	9.0
Family only	4.8
Friends only	3.9
Family and friends	1.7
Organized group	1.0

Hispanic Attitudes

Among Participants

Attitudes (By Factor)



Involvement

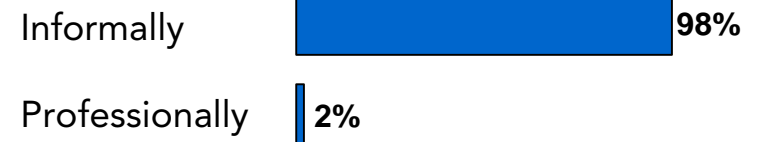
Experience Level Consider Themselves



% Introduced Others to Sport

31%

Introduced Others to Sport



Hispanics Lifecycle

Among Participants

Top Influencers To Start Any Activity

Friends/Peers who also wanted to try	35%
Parent/Guardians/family members	30%
Friends/Peers who were already active in it	24%
Boy Scout/Girl Scout programs	13%
Church/School	17%
Media/Books/Movies	10%

Reasons for Stopping Any Activity

General time constraints/too busy/family/job	59%
Equipment expensive/lacking	39%
Injuries/Health reasons/weight	32%
Now do other sports	28%
Don't enjoy it any more	10%

Reasons for Starting Any Activity Again

My friends influenced me	20%
I missed participating in the outdoor activity	18%
Lost weight/wanted to lose weight	12%
My children wanted to participate	12%
School/Club activity	8%

**Based on ever participating in the sport

Hispanic Shopping Behaviors

Among Participants

Apparel

\$254

Average Amount Spent Past
2 Years

Where Shop	Have Purchased	Most Often
Sporting good stores	52%	31%
Discount stores	48%	32%
Outdoor specialty stores	35%	19%
Department stores	22%	6%
Outdoor chain stores	15%	5%

Top Reasons Most Often

Fair price/reasonable	<div></div> 53%
Has the clothing I want/need	<div></div> 48%
Convenient location	<div></div> 40%
Has the brands I want	<div></div> 39%
Good quality	<div></div> 39%

Equipment

\$274

	Have Purchased	Most Often
Discount stores	46%	39%
Sporting good stores	41%	32%
Outdoor specialty stores	33%	14%
Outdoor chain stores	10%	4%
Department stores	16%	1%

Fair price/reasonable	<div></div> 62%
Convenient location	<div></div> 55%
Has the gear/equipment I want	<div></div> 52%
Good quality merchandise	<div></div> 50%
Good selection/variety	<div></div> 49%

Hispanic Respondent Demographic Profile

Hispanic Participation (247)

Age

16-24	43%
25-34	23%
35-44	19%
45+	15%

Average age 30.4 years

Gender

Male	50%
Female	50%

Education

High School or Less	48%
Some College	33%
4 Year Degree +	19%

Employed

70%

Married/Living with Partner

45%

Average Number of Adults in Household

2.6

Have Children

60%

Average Age of Children

10.8 years

Median Household Income

\$44,800

Hispanic Respondent Demographic Profile

Hispanic
Participation
(247)

Census Regions

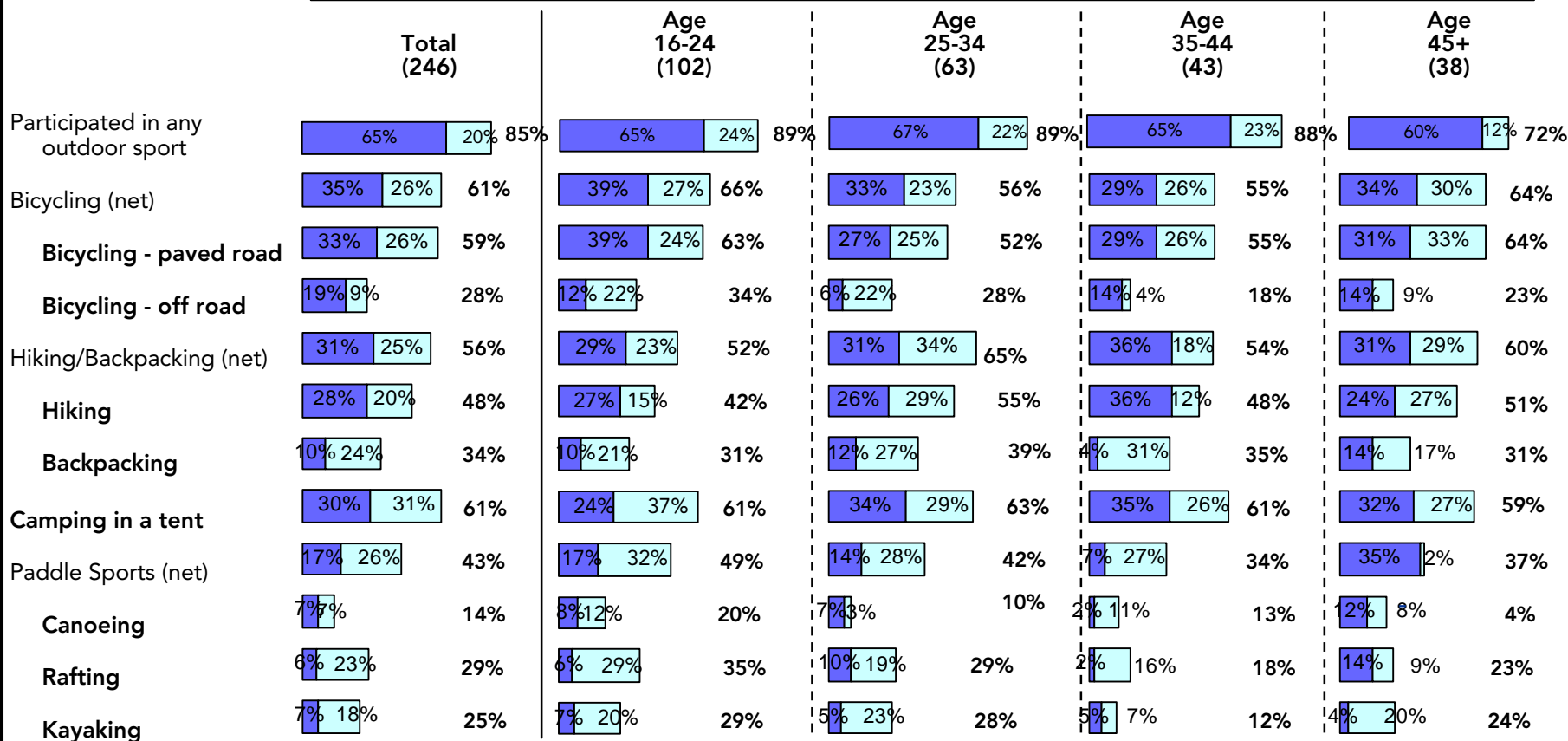
East	12%
South	38%
Midwest	12%
West	38%

Type of Area Live

Urban/City	40%
Suburban	33%
Small town	19%
Rural	8%

Hispanic Total Participation

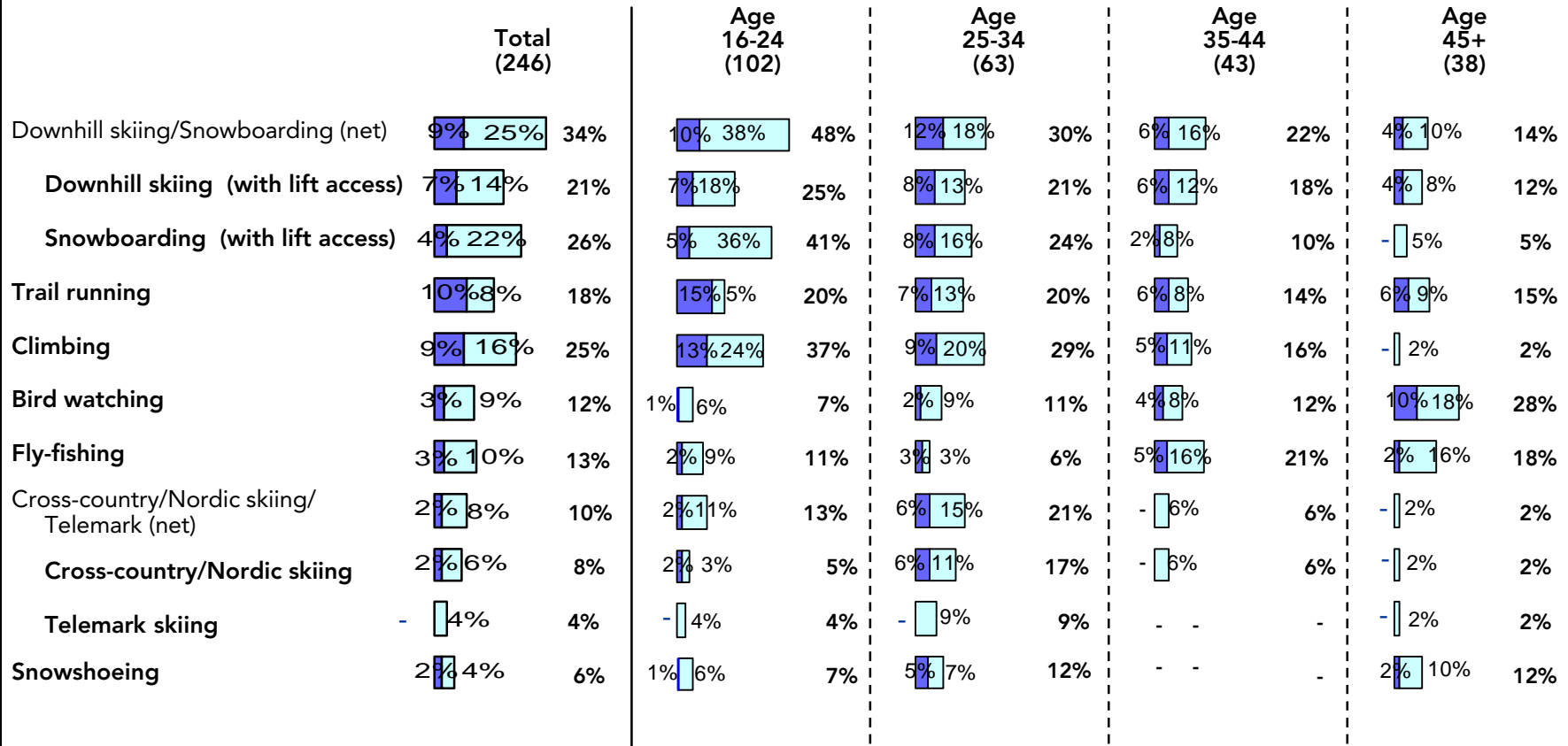
Hispanic Population



Hispanic

Total Participation (Continued)

Hispanic Population



45+ Singles

While the **45+ group** is smaller than the lucrative youth market, they are active and interested. Moreover, as the baby boomers age, they are staying active longer. Among the 45+ single group in particular:

- ★ 44% currently participate and 28% would consider trying something new.
- ★ Levels of participation are higher than average (average 3 times per month per activity) and among participants, 2.3 activities is the average.
- ★ Almost a quarter consider themselves to be experts in their activities and a third have introduced others to their sport.

While participation in some of the more physically demanding activities drops off somewhat after the age of 45+, they continue to purchase equipment and apparel for the activities they enjoy. If they have children (28%), they are also spending for them.

46% Strivers

32% Achievers/Experienced

45+ Singles

Participation Any Outdoor Activities

Total Marketplace

% Currently Participate	44%	}	% Potential Participation in Next 2 Years	72%
% Would Consider	28%			

Among Participants

% Currently Participate	100%
Mean # of Activities	2.3

Frequency of Participation
(Mean # of Times in Past 2 Years) 72.0

% Have Traveled 50 Miles or More to
Participate in Activity 62%

% Have Used an RV When Traveled
50 Miles or More 9%

Favorite Activities Participate In (Top 4)

Backpacking/Hiking	47%
Road Biking	38%
Camping	30%
Paddle sports	23%

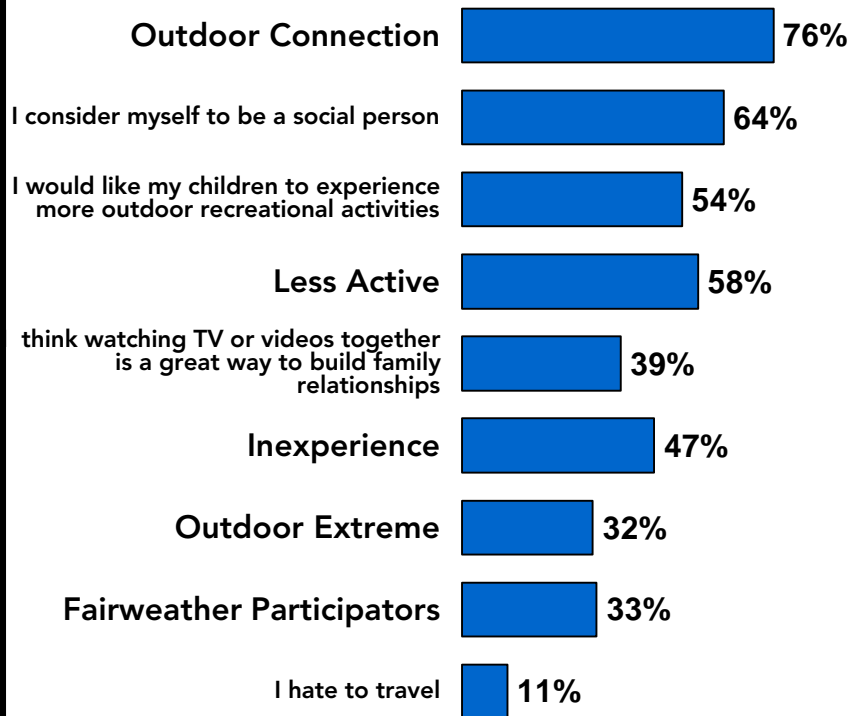
With Whom Participated (Mean # of Times)

Alone	11.4
Family/Friends	1.9
Organized group	0.4
Family only	4.1
Friends only	3.4

45+ Singles Attitudes

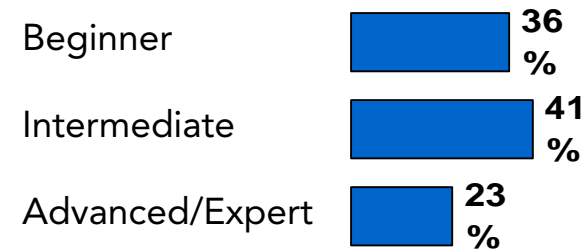
Among Participants

Attitudes (By Factor)



Involvement

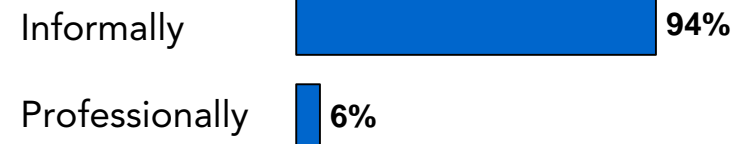
Experience Level Consider Themselves



% Introduced Others to Sport

33%

Introduced Others to Sport



45+ Singles Lifecycle

Among Participants

Top Influencers To Start Any Activity

Parents/guardians/family members	37%
Friends/peers who also wanted to try	32%
Friends/peers who were already active in it	32%
Boy Scout/Girl Scout programs	19%
Media/Books/Movies	19%

Reasons for Stopping Any Activity

Injuries/Health reasons	41%
General time constraints/too busy/family	25%
Equipment expensive/lacking	23%
Don't enjoy it any more	20%
Job got in the way	16%

Reasons for Starting Any Activity Again

I missed participating in the outdoor activity	20%
Lost weight/wanted to lose weight	12%
My friends influenced me	12%
My children wanted to participate	10%

**Based on ever participating in the sport

45+ Singles Shopping Behaviors

Among Participants

Apparel

Average Amount Spent Past
2 Years

\$258

Where Shop	Have Purchased	Most Often
Sporting good stores	40%	21%
Discount stores	56%	34%
Outdoor specialty stores	29%	12%
Department stores	26%	10%
Outdoor chain stores	26%	10%

Top Reasons Most Often



Equipment

\$341

Where Shop	Have Purchased	Most Often
Discount stores	60%	42%
Sporting good stores	45%	20%
Outdoor specialty stores	28%	15%
Outdoor chain stores	23%	12%
Department stores	12%	5%



45+ Singles Characteristics

Among Participants

% Male 48%
% White 74%

Household Size

of Adults in household (mean) 1.9

% of Households with children 28%

Average age of children 10.9

Education

High school graduate or less 28%

Completed some college 59%

College graduate + 13%

% Employed 64%

% Median Income \$35,100

Where Live

Urban 32%

Suburban 33%

Small town 25%

Rural 10%

Regions

East 21%

South 25%

Midwest 31%

West 23%

Females

Females are more dominant among **Strivers** than **Achievers**. This is good news since they have a strong influence in determining the direction of “family” activities as well as household spending.

- ☐ Strivers in particular skew female urban women – often mothers – in bird watching, camping, climbing and snowshoeing.

60% Strivers

47% Achievers/Experienced

Females

Participation Any Outdoor Activities

Total Marketplace

% Currently Participate	61%	}	% Potential Participation in Next 2 Years	85%
% Would Consider	24%			

Among Participants

% Currently Participate	100%
Mean # of Activities	2.2

Favorite Activities Participate In (Top 4)






Bicycling/Paved Road		42 %
Camping		42 %
Backpacking/Hiking		39 %
Paddle sports		25 %

Frequency of Participation (Mean # of Times in Past 2 Years)	72.3
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% Have Traveled 50 Miles or More to Participate in Activity	48%
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% Have Used an RV When Traveled 50 Miles or More	8%
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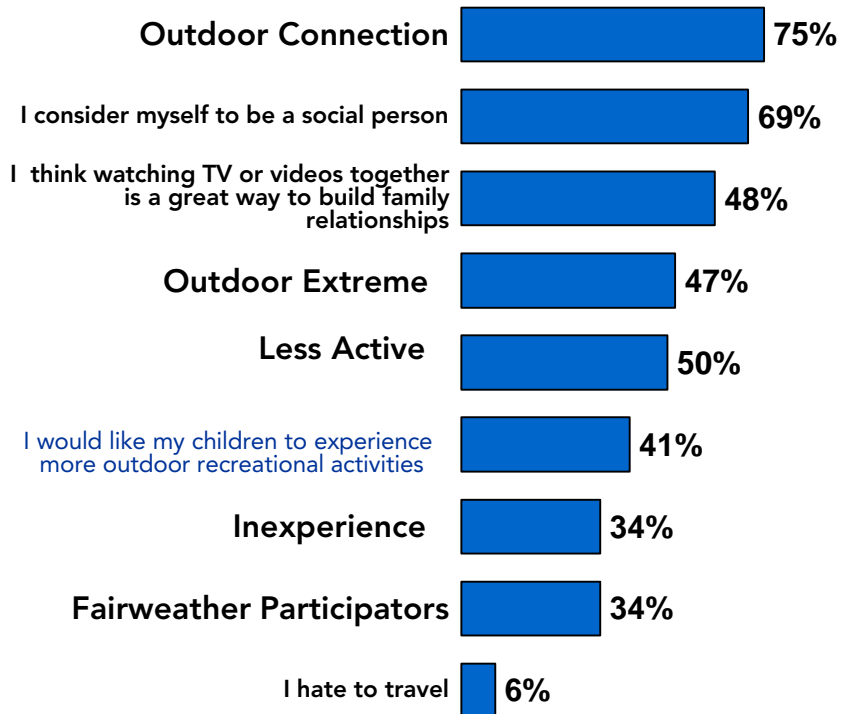
With Whom Participated (Mean # of Times)

Alone		9.0
Family only		1.8
Friends only		1.3
Family and friends		5.3
Organized group		2.5

Females Attitudes

Among Participants

Attitudes (By Factor)



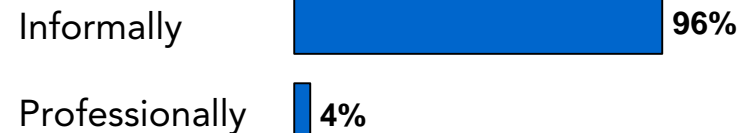
Involvement

Experience Level Consider Themselves



% Introduced Others to Sport 33%

Introduced Others to Sport



Females Shopping Behaviors

Among Participants

Apparel

Average Amount Spent Past
2 Years

\$224

Where Shop	Have Purchased	Most Often
Sporting good stores	43%	24%
Discount stores	60%	41%
Outdoor specialty stores	23%	8%
Department stores	23%	10%
Outdoor chain stores	22%	9%

Top Reasons Most Often



Equipment

\$365

Where Shop	Have Purchased	Most Often
Discount stores	46%	39%
Sporting good stores	41%	32%
Outdoor specialty stores	33%	14%
Outdoor chain stores	10%	4%
Department stores	16%	1%



Female Characteristics

Among Participants

% Married 55%
% White 78%

Household Size

of Adults in household (mean) 2.4
% of Households with children 35%
Average age of children 10.4

Education

High school graduate or less 40%
Completed some college 34%
College graduate + 27%

% Employed 62%

% Median Income \$53,800

Where Live

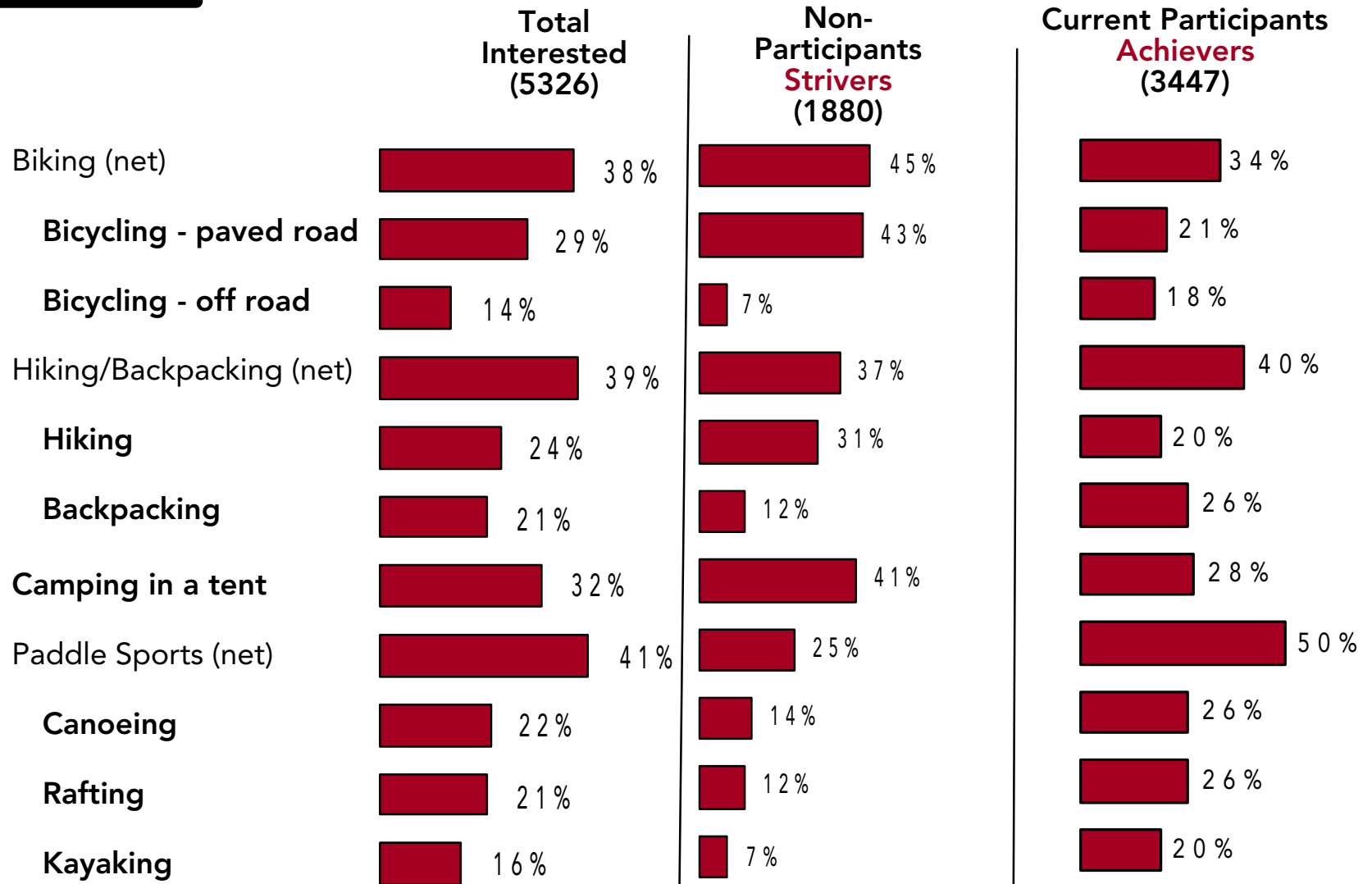
Urban 24%
Suburban 32%
Small town 26%
Rural 16%

Regions

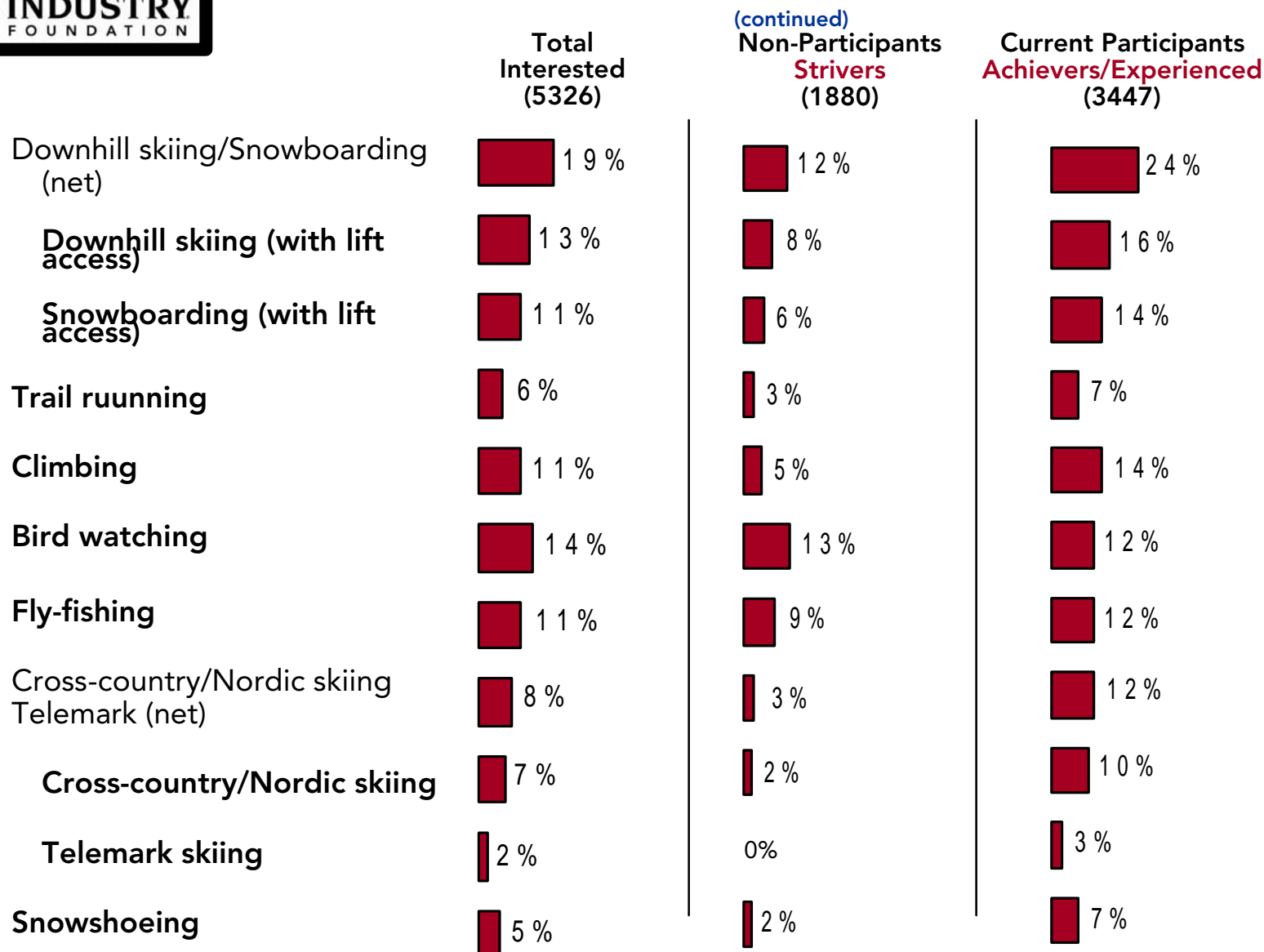
18-24 25%
25-34 18%
35-44 22%
45+ 35%

Projected Participation and Spending

Activities Desirable to Those Interested

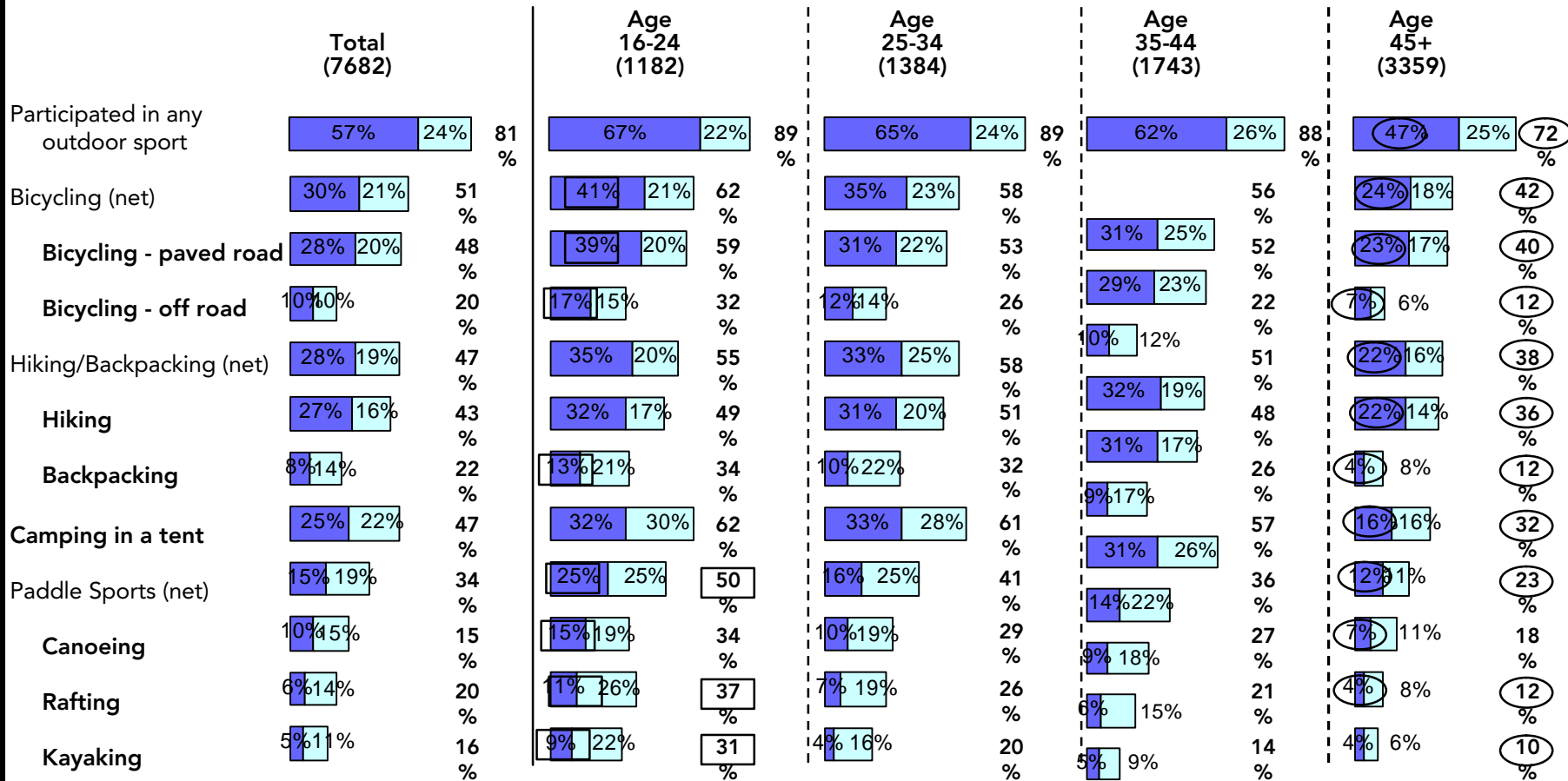


Activities Desirable to Those Interested



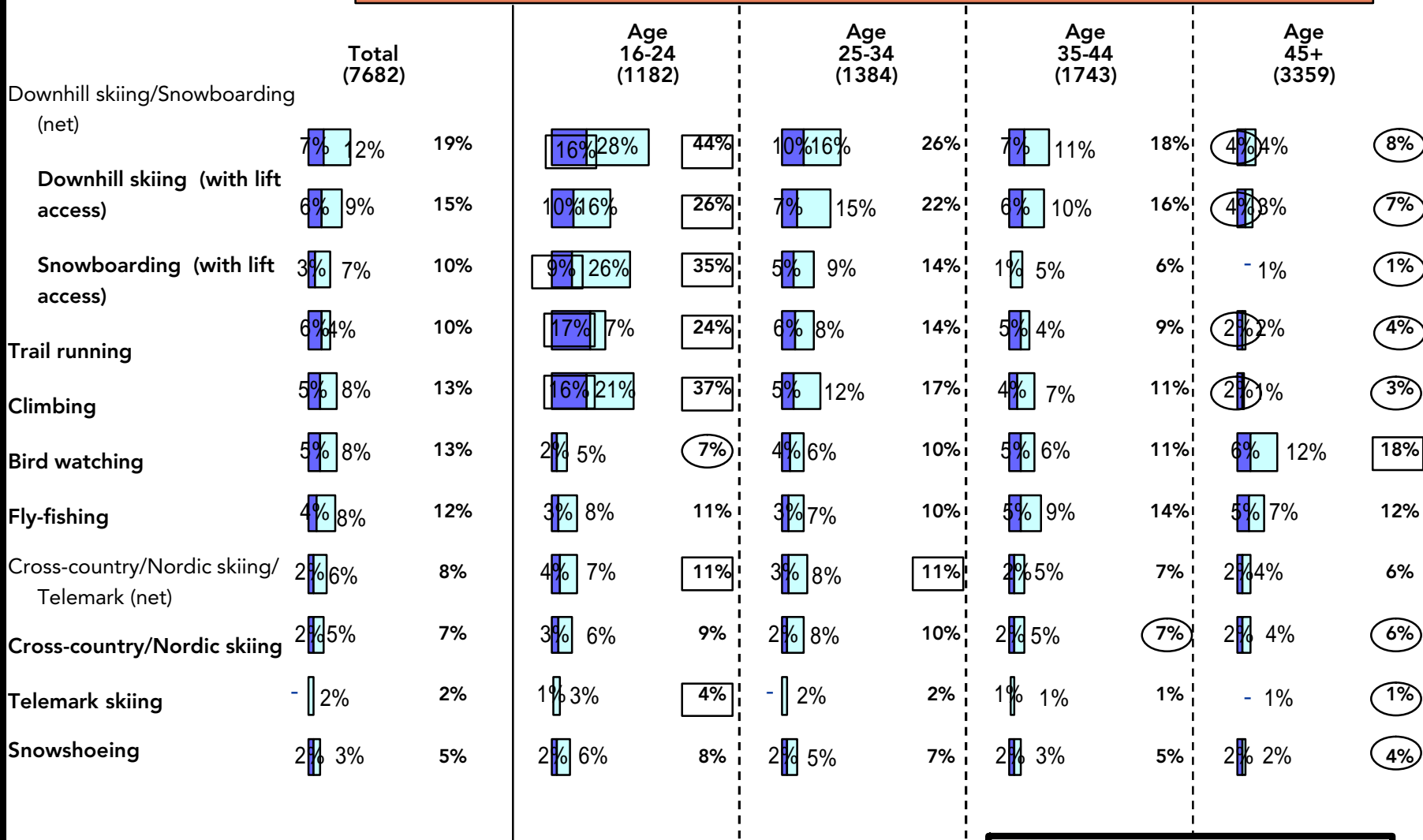
Total Projected Participation

General Population



Total Projected Participation (Continued)

General Population



Projected Apparel Spending in Each Age Range*

Participation Age	Back-packing	Camping	Road Biking	Mountain Biking	Bird Watching	CC/Nordic Skiing	Fly Fishing	Hiking
16-24	\$236.68	\$368.52	\$354.83	\$428.79	\$151.02	\$210.32	\$547.31	\$407.42
25-34	\$572.50	\$658.21	\$616.10	\$507.72	\$431.68	\$1,252.31	\$869.48	\$449.24
35-44	\$623.01	\$544.34	\$575.69	\$569.37	\$493.84	\$443.47	\$866.02	\$510.28
45+	\$1,688.58	\$1,430.67	\$2,100.46	\$1,059.39	\$1,338.35	\$1,146.69	\$2,974.92	\$1,362.99

Participation Age	Canoeing	Kayaking	Rafting	Trail Running	Climbing	Snow-shoeing	Downhill Skiing	Snow-boarding
16-24	\$344.82	\$214.77	\$258.22	\$341.52	\$392.09	\$236.68	\$383.16	\$438.57
25-34	\$402.01	\$507.98	\$874.33	\$633.70	\$562.85	\$572.50	\$538.06	\$1,015.68
35-44	\$669.25	\$1,115.68	\$835.33	\$895.03	\$907.83	\$623.01	\$754.58	\$795.57
45+	\$1,110.57	\$917.42	\$2,029.66	\$1,363.75	\$719.51	\$1,688.58	\$3,442.26	\$520.47

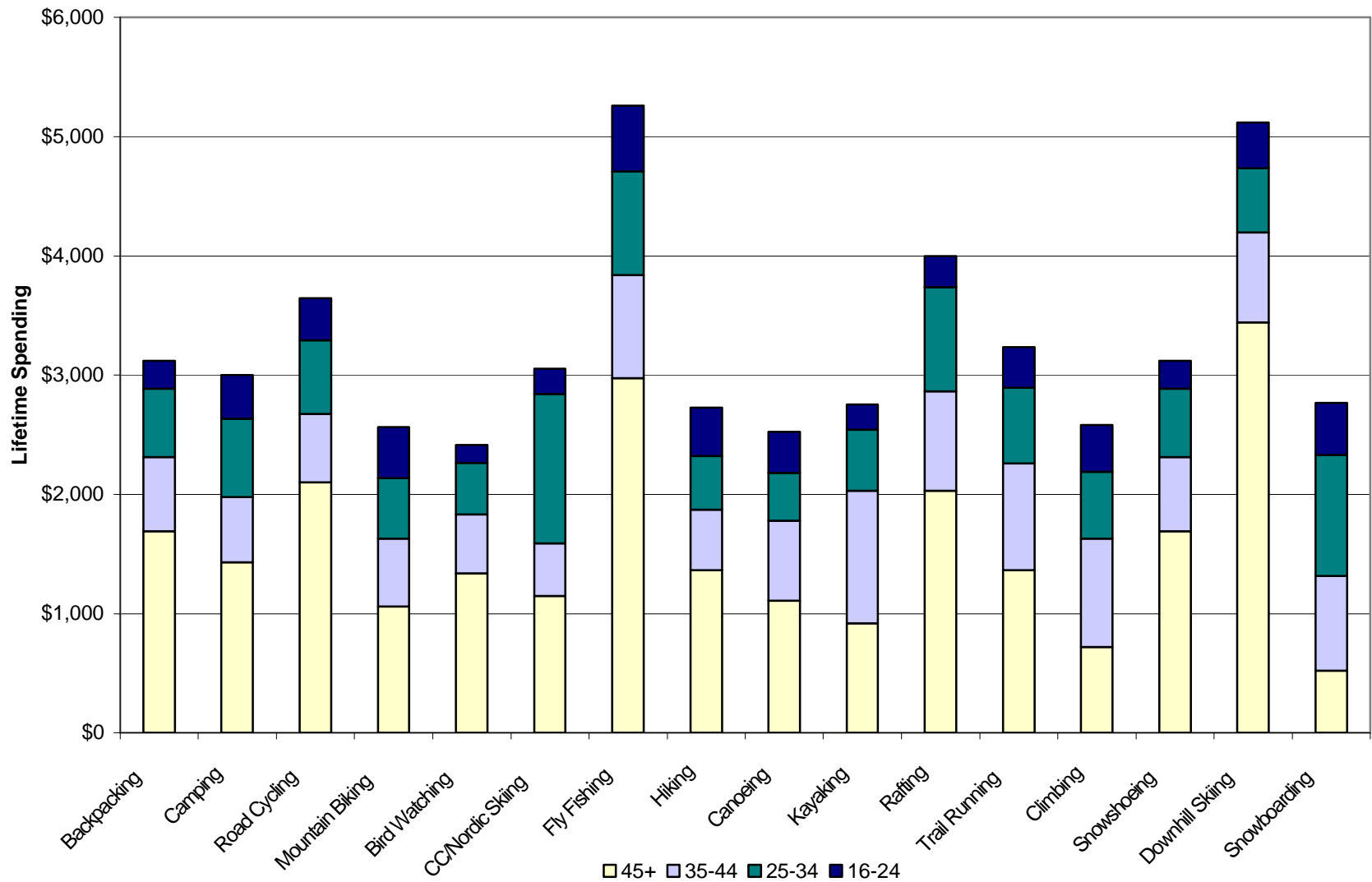
*Averages estimated for participants in each age group. Please note, age 45+ incorporates a 20 year class and therefore includes more participants.

Projected Lifetime Spending - Apparel

Age start participating	Bird Watching	Canoeing	Mountain Biking	Climbing	Hiking	Kayaking	Snow-boarding	Camping
16-24	\$ 2,414.90	\$ 2,526.65	\$ 2,565.28	\$ 2,582.28	\$ 2,729.93	\$ 2,755.84	\$ 2,770.29	\$ 3,001.74
25-34	\$ 2,263.87	\$ 2,181.83	\$ 2,136.49	\$ 2,190.19	\$ 2,322.51	\$ 2,541.08	\$ 2,331.72	\$ 2,633.22
35-44	\$ 1,832.19	\$ 1,779.82	\$ 1,628.77	\$ 1,627.34	\$ 1,873.27	\$ 2,033.10	\$ 1,316.04	\$ 1,975.02
45+	\$ 1,338.35	\$ 1,110.57	\$ 1,059.39	\$ 719.51	\$ 1,362.99	\$ 917.42	\$ 520.47	\$ 1,430.67

*Averages taken by activity involved in and age began participating. Assumes no lapse in participation.

Projected Lifetime Spending on Apparel



Projected Equipment Spending in Each Age Range*

Participation Age	Back-packing	Camping	Road Biking	Mountain Biking	Bird Watching	CC/Nordic Skiing	Fly Fishing	Hiking
16-24	\$321.55	\$385.50	\$435.32	\$540.53	\$338.50	\$229.25	\$589.15	\$276.94
25-34	\$494.57	\$1,341.88	\$872.61	\$776.78	\$993.51	\$3,795.53	\$2,286.81	\$760.36
35-44	\$847.61	\$1,150.76	\$918.87	\$845.84	\$1,676.33	\$968.16	\$2,242.44	\$1,214.73
45+	\$2,611.99	\$2,538.70	\$3,258.79	\$1,823.58	\$1,017.39	\$2,610.29	\$5,400.33	\$3,322.07

Participation Age	Canoeing	Kayaking	Rafting	Trail Running	Climbing	Snow-shoeing	Downhill Skiing	Snow-boarding
16-24	\$330.60	\$215.83	\$303.43	\$278.35	\$556.97	\$321.55	\$474.21	\$538.86
25-34	\$503.65	\$615.51	\$1,759.66	\$521.98	\$441.51	\$494.57	\$719.35	\$740.87
35-44	\$1,329.69	\$1,452.63	\$1,696.47	\$928.46	\$1,373.34	\$847.61	\$931.47	\$1,187.01
45+	\$3,707.71	\$1,837.87	\$5,439.50	\$1,462.32	\$3,005.45	\$2,611.99	\$4,712.38	\$2,309.65

*Averages estimated for participants in each age group. Please note, age 45+ incorporates a 20 year class and therefore includes more participants.

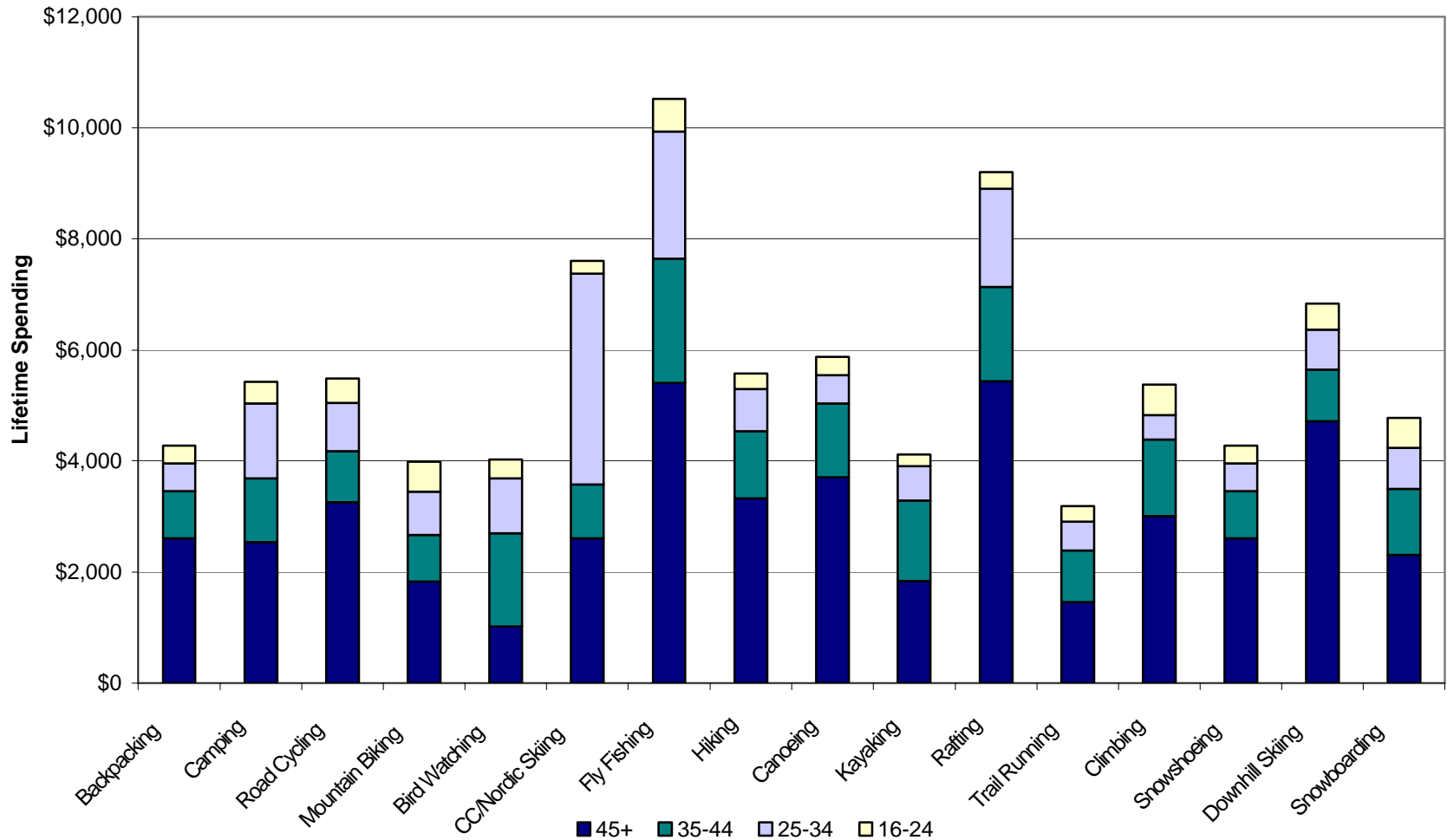
Projected Lifetime Equipment Spending

Age start participating	Trail Running	Mountain Biking	Bird Watching	Kayaking	Back-packing	Snow-shoeing	Snow-boarding	Climbing
16-24	\$ 3,191.11	\$ 3,986.73	\$ 4,025.73	\$ 4,121.84	\$ 4,275.73	\$ 4,275.73	\$ 4,776.39	\$ 5,377.27
25-34	\$ 2,912.76	\$ 3,446.20	\$ 3,687.22	\$ 3,906.01	\$ 3,954.17	\$ 3,954.17	\$ 4,237.53	\$ 4,820.30
35-44	\$ 2,390.78	\$ 2,669.42	\$ 2,693.72	\$ 3,290.50	\$ 3,459.60	\$ 3,459.60	\$ 3,496.66	\$ 4,378.79
45+	\$ 1,462.32	\$ 1,823.58	\$ 1,017.39	\$ 1,837.87	\$ 2,611.99	\$ 2,611.99	\$ 2,309.65	\$ 3,005.45

Age start participating	Camping	Road Biking	Hiking	Canoeing	Downhill Skiing	CC/Nordic Skiing	Rafting	Fly Fishing
16-24	\$ 5,416.83	\$ 5,485.59	\$ 5,574.10	\$ 5,871.65	\$ 6,837.41	\$ 7,603.23	\$ 9,199.06	\$ 10,518.72
25-34	\$ 5,031.34	\$ 5,050.27	\$ 5,297.16	\$ 5,541.05	\$ 6,363.20	\$ 7,373.98	\$ 8,895.62	\$ 9,929.57
35-44	\$ 3,689.46	\$ 4,177.66	\$ 4,536.80	\$ 5,037.40	\$ 5,643.84	\$ 3,578.45	\$ 7,135.97	\$ 7,642.77
45+	\$ 2,538.70	\$ 3,258.79	\$ 3,322.07	\$ 3,707.71	\$ 4,712.38	\$ 2,610.29	\$ 5,439.50	\$ 5,400.33

*Averages taken by activity involved in and age began participating. Assumes no lapse in participation.
Not adjusted for multiple activities

Projected Lifetime Spending - Equipment



Demographic Profiles by Activity and Spending

Backpacking/Hiking Respondent Demographic Profile

Compared to current participants, those interested in this activity for the first time:

★ Skew younger – particularly the 16-24 age group, are female and somewhat more likely to have children.

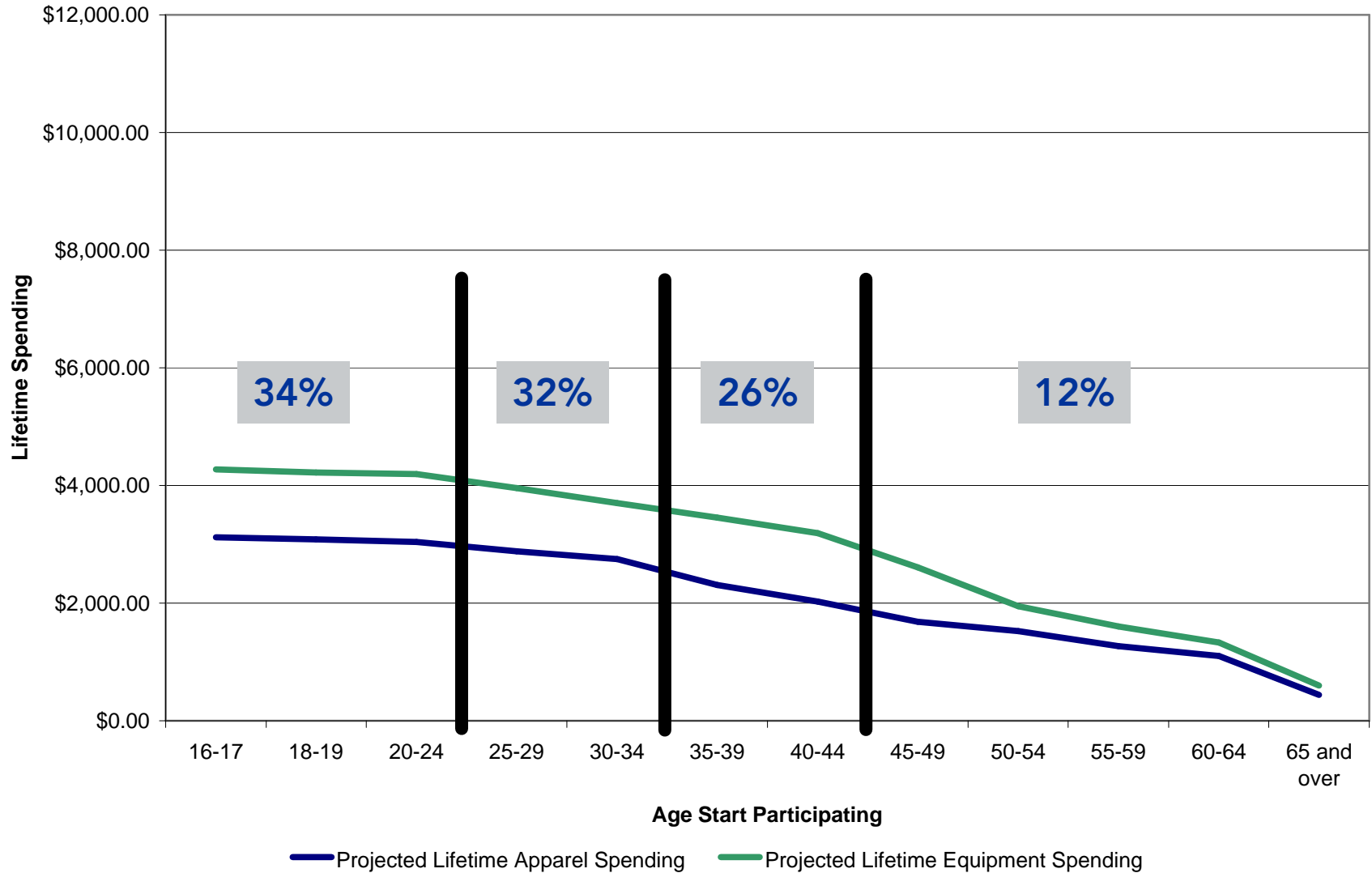
★ Less educated and less likely to be employed.

	<u>Total Interested</u> (611)	<u>Current Participants</u> (744)
Age		
16-24	30%	22%
25-34	19%	17%
35-44	21%	24%
45+	30%	37%
Average Age	35.7 years	39.3 years
Gender		
Male	50%	55%
Female	50%	45%
Race		
White	79%	82%
Hispanic	12%	9%
African American	5%	4%
Other	4%	5%
Education		
High School or Less	35%	31%
Some College	34%	31%
4 Year Degree +	31%	38%
Employed	61%	66%

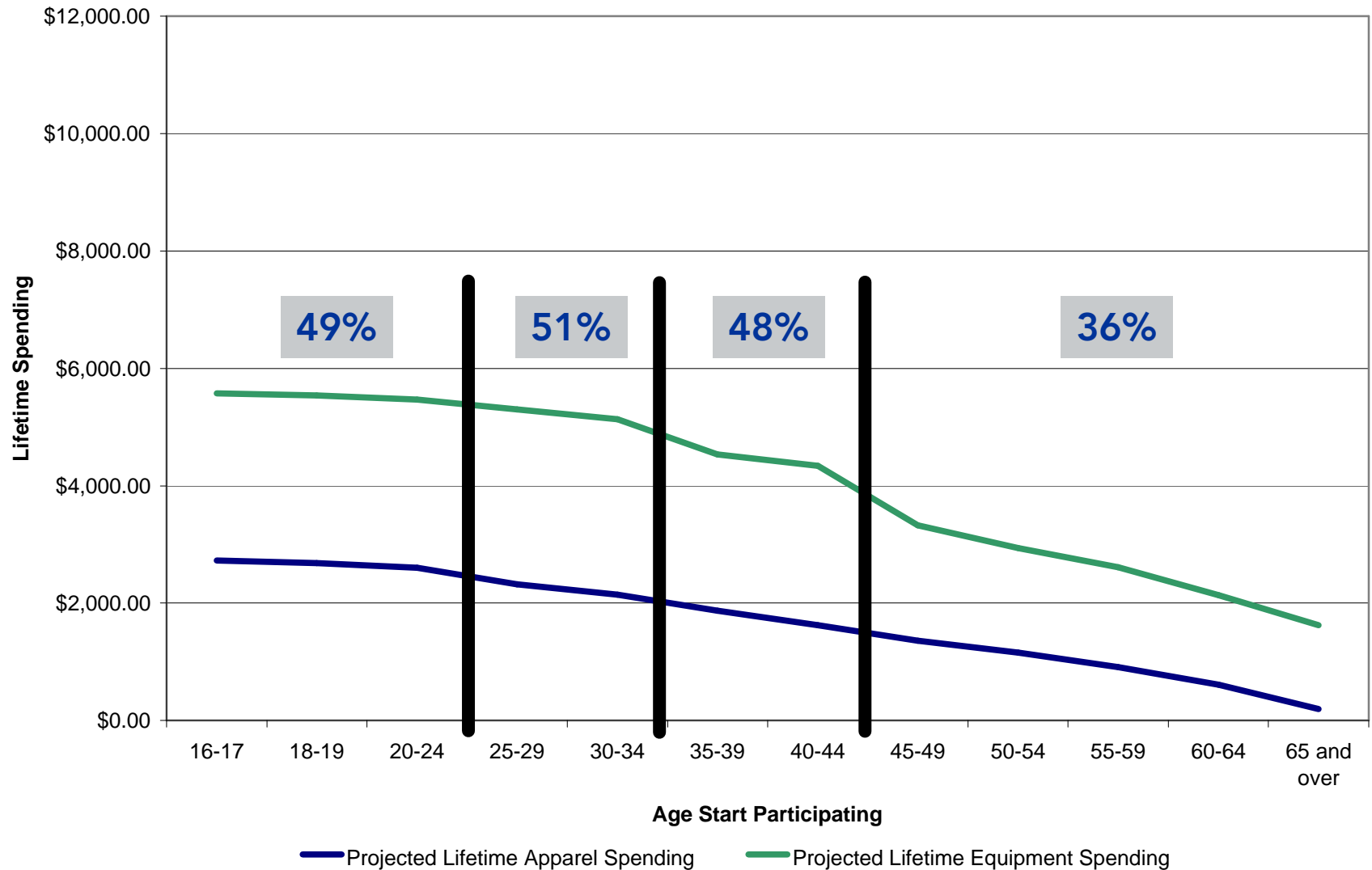
Backpacking/Hiking Respondent Demographic Profile

	<u>Total Interested</u> (611)	<u>Current Participants</u> (744)
Married/Living with Partner	54%	55%
Average # of Adults in Household	2.5	2.2
Have Children	51%	44%
Median Household Income	\$62,500	\$62,500
Type of Area Live		
Urban/City	26%	26%
Suburban	37%	32%
Small Town	23%	24%
Rural	13%	19%

Projected Lifetime Spending: Backpacking



Projected Lifetime Spending: Hiking



Road Biking

Respondent Demographic Profile

Compared to current participants, those interested in pursuing paved road bicycling as a new activity:

★ Skew toward the oldest segment (45+ years) and away from the youngest (16-24).

★ Skew female, slightly urban and ethnic, and married but less likely to have children than current participants.

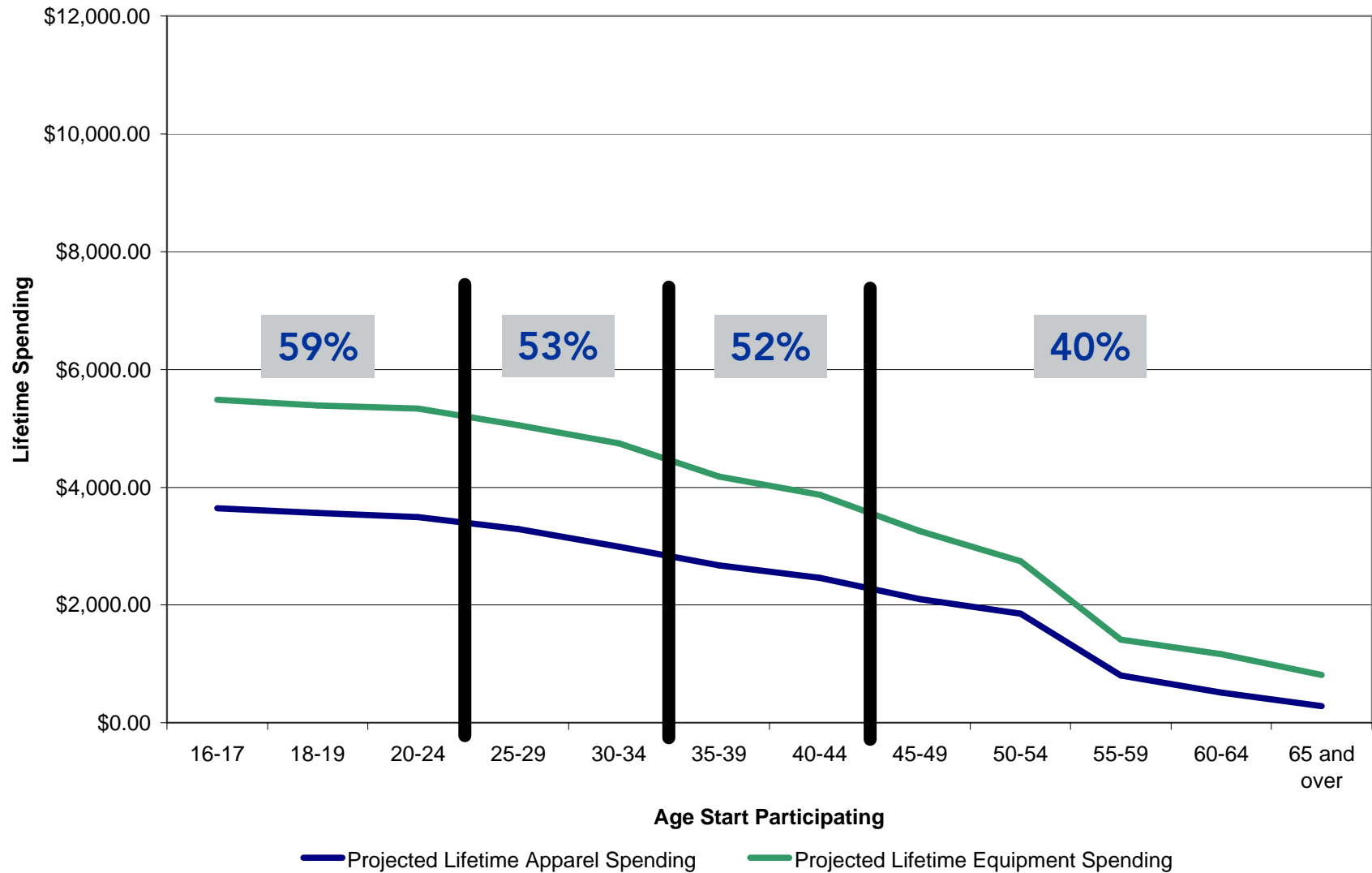
	<u>Total Interested (1541)</u>	<u>Current Participants (2175)</u>
Age		
16-24	17%	24%
25-34	18%	18%
35-44	25%	23%
45+	40%	35%
Average Age	40.7 years	38.8 years
Gender		
Male	42%	56%
Female	58%	44%
Race		
White	74%	78%
Hispanic	13%	12%
African American	9%	7%
Other	4%	3%
Education		
High School or Less	40%	40%
Some College	29%	30%
4 Year Degree +	31%	30%
Employed	64%	65%

Road Biking

Respondent Demographic Profile

	<u>Total Interested</u> (1541)	<u>Current Participants</u> (2175)
Married/Living with Partner	63%	60%
Average # of Adults in Household	2.2	2.3
Have Children	42%	49%
Median Household Income	\$62,500	\$62,500
Type of Area Live		
Urban/City	31%	28%
Suburban	31%	33%
Small Town	24%	25%
Rural	14%	15%

Projected Lifetime Spending: Road Biking



Mountain Biking Respondent Demographic Profile

Compared to current participants, those interested in pursuing mountain biking as a new activity:

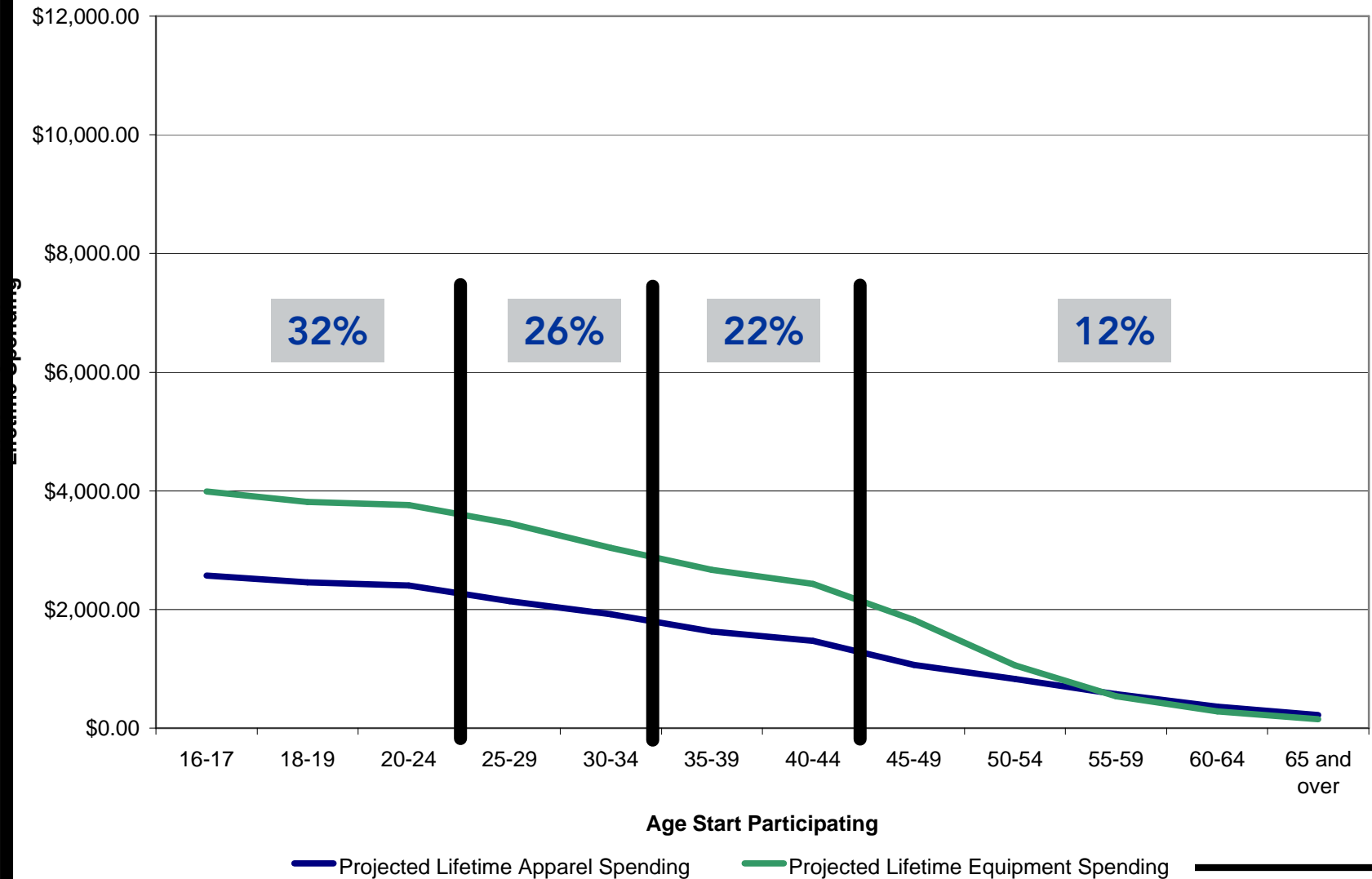
★ Skew female, less educated and less likely to be employed. Otherwise, profile is similar to current participants.

	Total Interested (763)	Current Participants (781)
Age		
16-24	27%	29%
25-34	22%	20%
35-44	26%	22%
45+	25%	29%
Average Age	36.0 years	35.9 years
Gender		
Male	53%	68%
Female	47%	32%
Race		
White	75%	75%
Hispanic	14%	15%
African American	6%	6%
Other	5%	4%
Education		
High School or Less	44%	36%
Some College	28%	29%
4 Year Degree +	28%	35%
Employed	65%	70%

Mountain Biking Respondent Demographic Profile

	<u>Total Interested (763)</u>	<u>Current Participants (781)</u>
Married/Living with Partner	55%	56%
Average # of Adults in Household	2.2	2.3
Have Children	48%	49%
Median Household Income	\$62,500	\$62,500
Type of Area Live		
Urban/City	31%	29%
Suburban	29%	30%
Small Town	24%	25%
Rural	17%	15%

Projected Lifetime Spending: Mountain Biking



Bird Watching Respondent Demographic Profile

Compared to current participants, those interested in this activity for the first time:

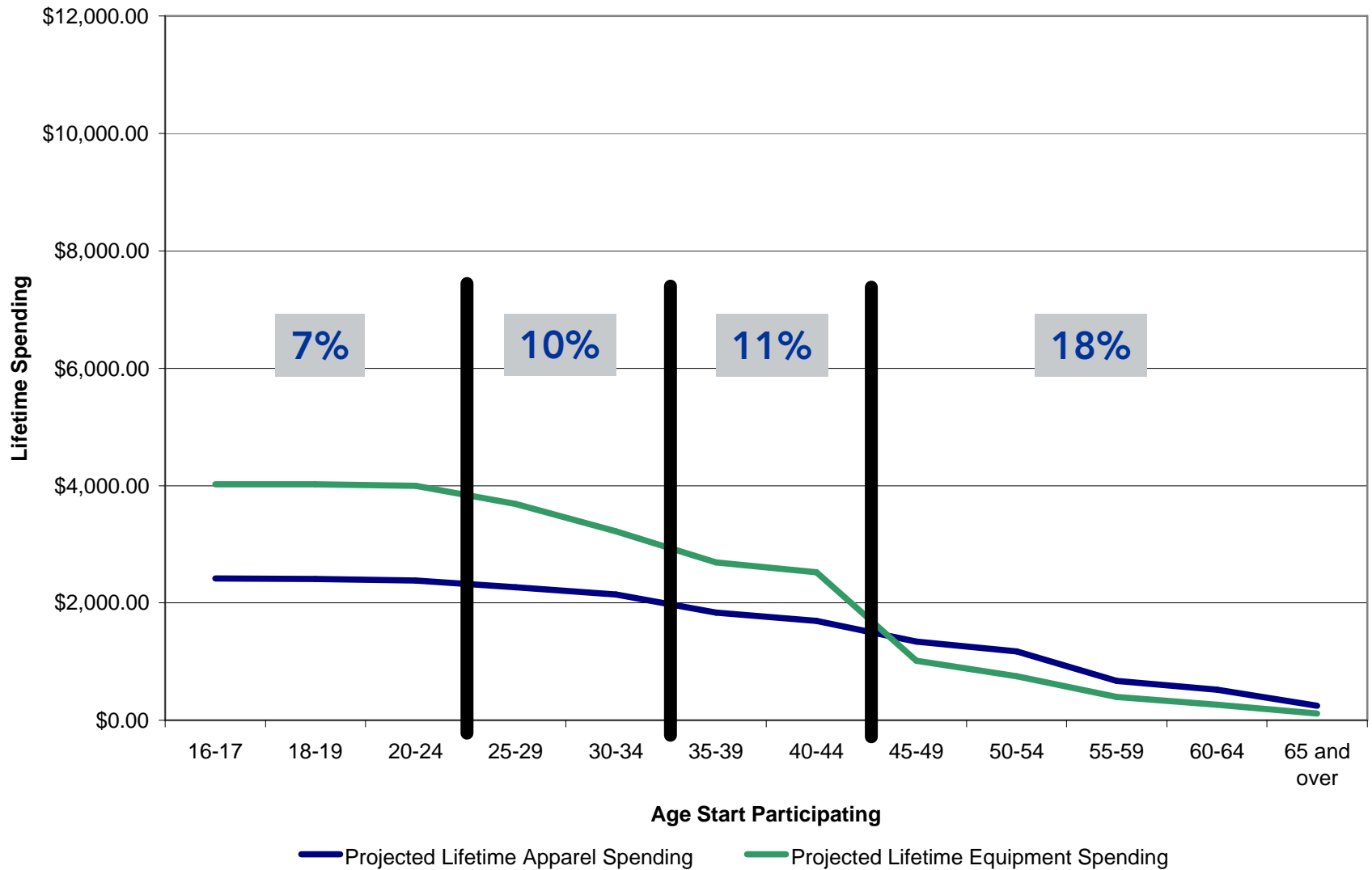
★ Are similar in profile. However, the majority are female and over 45 with somewhat lower-income.

	<u>Total Interested (658)</u>	<u>Current Participants (349)</u>
Age		
16-24	8%	9%
25-34	12%	13%
35-44	18%	22%
45+	62%	56%
Average Age	47.8 years	47.2 years
Gender		
Male	38%	51%
Female	62%	49%
Race		
White	81%	85%
Hispanic	11%	7%
African American	4%	6%
Other	4%	2%
Education		
High School or Less	38%	31%
Some College	34%	36%
4 Year Degree +	28%	33%
Employed	59%	56%

Bird Watching Respondent Demographic Profile

	<u>Total Interested (658)</u>	<u>Current Participants (349)</u>
Married/Living with Partner	59%	63%
Average # of Adults in Household	2.2	2.2
Have Children	35%	40%
Median Household Income	\$42,500	\$42,500
Type of Area Live		
Urban/City	27%	24%
Suburban	28%	28%
Small Town	24%	25%
Rural	21%	23%

Projected Lifetime Spending: Bird Watching



Cross-Country/Nordic/Telemark Skiing Respondent Demographic Profile

Compared to current participants, those interested in pursuing these activities are similar to participants with a couple of exceptions:

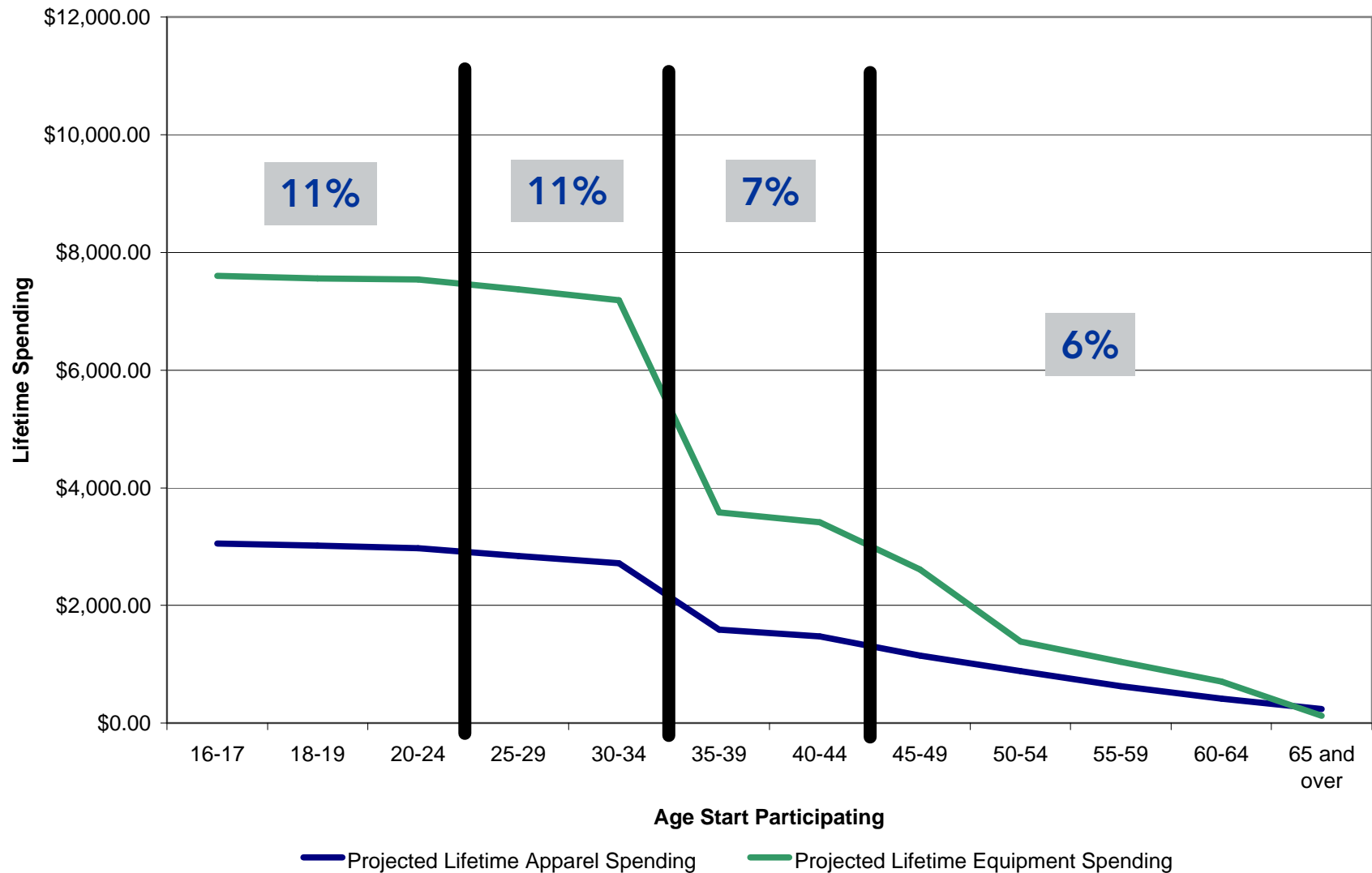
★ Skew female, younger and are less likely than current participants to be Caucasian. For ethnic groups, there is a growth of interest among Hispanics.

	Total <u>Interested</u> (182)	<u>Current Participants</u> (86)
Age		
16-24	33%	24%
25-34	15%	17%
35-44	25%	21%
45+	27%	38%
Average Age	34.5 years	39.0 years
Gender		
Male	44%	60%
Female	56%	40%
Race		
White	79%	91%
Hispanic	12%	5%
African American	6%	0%
Other	3%	4%
Education		
High School or Less	29%	27%
Some College	31%	23%
4 Year Degree +	40%	50%
Employed	60%	64%

Cross-Country/Nordic/Telemark Skiing Respondent Demographic Profile

	<u>Total Interested (86)</u>	<u>Current Participants (182)</u>
Married/Living with Partner	47%	56%
Average # of Adults in Household	2.3	2.3
Have Children	55%	47%
Median Household Income	\$62,500	\$62,500
Type of Area Live		
Urban/City	27%	29%
Suburban	34%	35%
Small Town	27%	22%
Rural	12%	14%

Projected Lifetime Spending: Cross-Country/Nordic/Telemark Skiing



Fly Fishing

Respondent Demographic Profile

Compared to current participants, those interested in this activity for the first time:

★ Skew younger, slightly female, and better educated.

★ There is growing interest among Hispanics and those in urban areas.

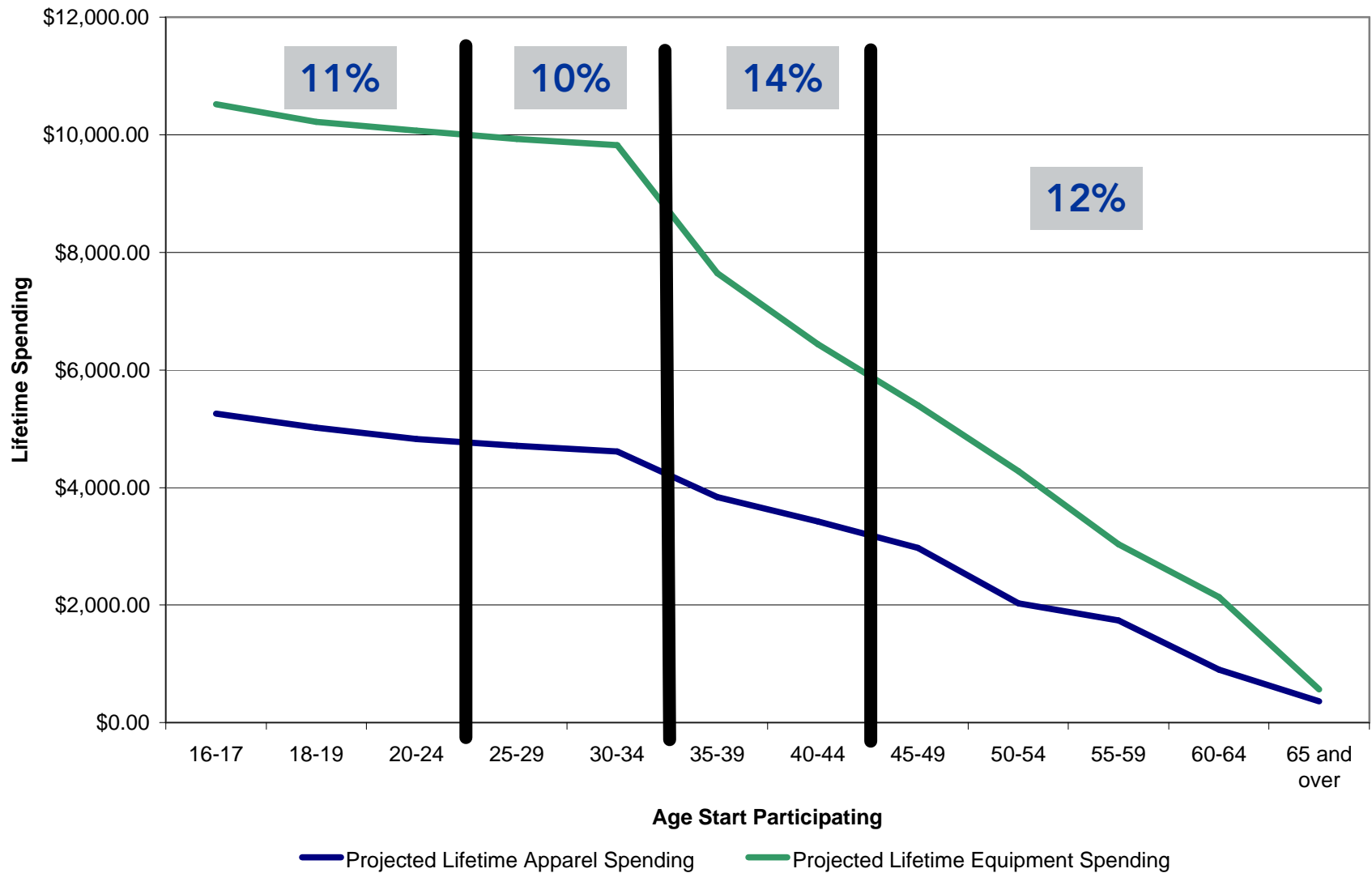
	<u>Total Interested</u> (591)	<u>Current Participants</u> (328)
Age		
16-24	17%	14%
25-34	13%	12%
35-44	26%	23%
45+	44%	51%
Average Age	42.4 years	44.4 years
Gender		
Male	66%	75%
Female	34%	25%
Race		
White	75%	86%
Hispanic	13%	7%
African American	7%	5%
Other	5%	2%
Education		
High School or Less	37%	45%
Some College	38%	28%
4 Year Degree +	25%	27%
Employed	61%	67%

Fly Fishing

Respondent Demographic Profile

	<u>Total Interested</u> (591)	<u>Current Participants</u> (328)
Married/Living with Partner	65%	68%
Average # of Adults in Household	2.2	2.4
Have Children	49%	44%
Median Household Income	\$62,500	\$62,500
Type of Area Live		
Urban/City	26%	21%
Suburban	27%	26%
Small Town	30%	35%
Rural	17%	19%

Projected Lifetime Spending: Fly Fishing



Camping

Respondent Demographic Profile

Compared to current participants, those interested in pursuing camping as a new activity:

★ Skew female and toward the over 35 set.

★ Less likely to be Caucasian with some growth in interest among African Americans specifically. More likely to be single and childless.

★ Less educated, less likely to be employed, lower income and more urban/suburban than current campers.

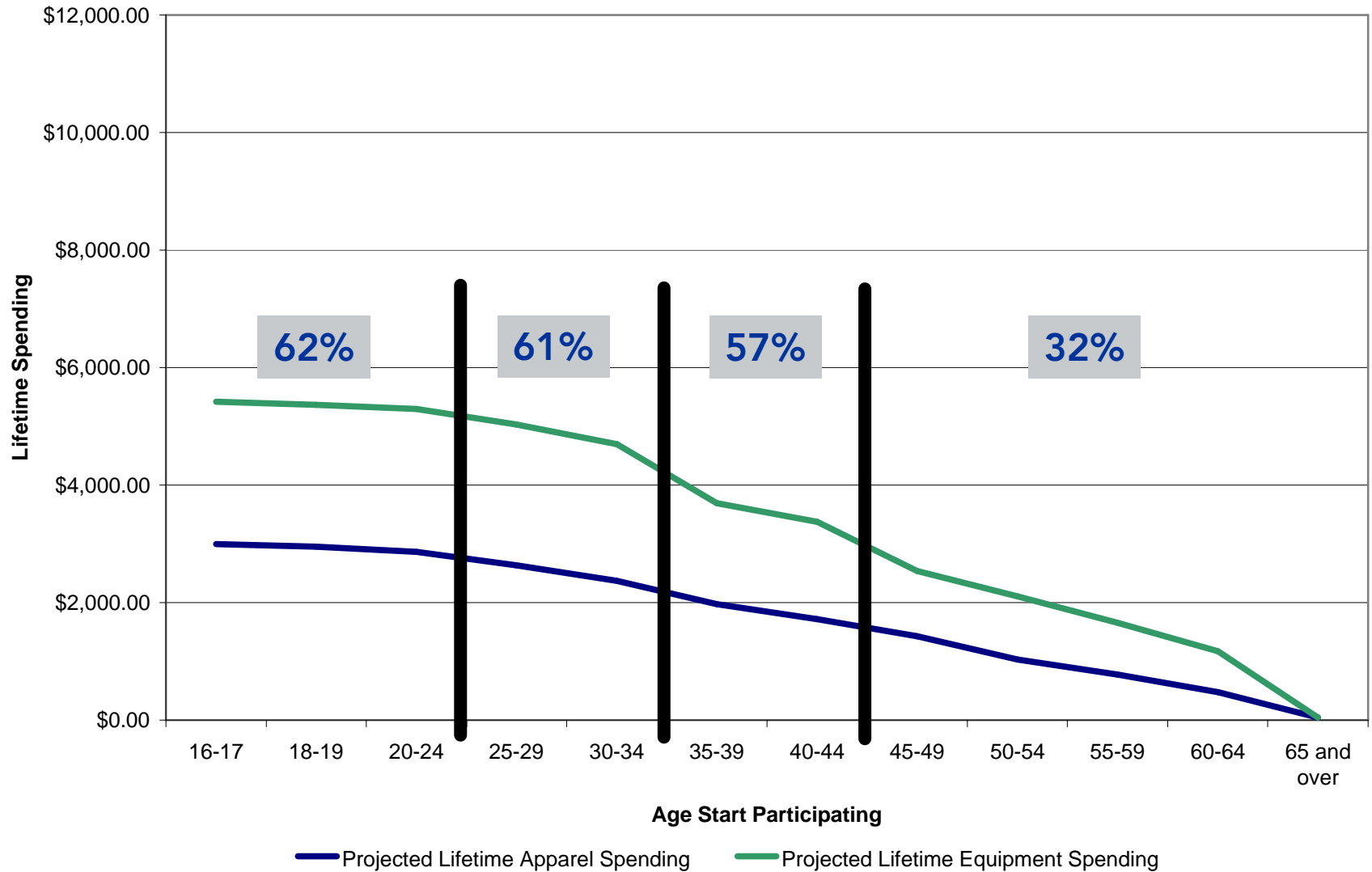
	Total Interested (1730)	Current Participants (1900)
Age		
16-24	22%	22%
25-34	21%	21%
35-44	25%	28%
45+	32%	28%
Average Age	37.8 years	37.1 years
Gender		
Male	44%	54%
Female	56%	46%
Race		
White	73%	81%
Hispanic	14%	13%
African American	8%	2%
Other	5%	4%
Education		
High School or Less	47%	43%
Some College	29%	32%
4 Year Degree +	24%	25%
Employed	65%	69%

Camping

Respondent Demographic Profile

	<u>Total Interested</u> (1730)	<u>Current Participants</u> (1900)
Married/Living with Partner	56%	61%
Average # of Adults in Household	2.2	2.3
Have Children	50%	54%
Median Household Income	\$42,500	\$62,500
Type of Area Live		
Urban/City	31%	24%
Suburban	31%	28%
Small Town	26%	29%
Rural	12%	19%

Projected Lifetime Spending: Camping



Paddlesport Respondent Demographic Profile

Compared to current participants, those interested in this activity for the first time:

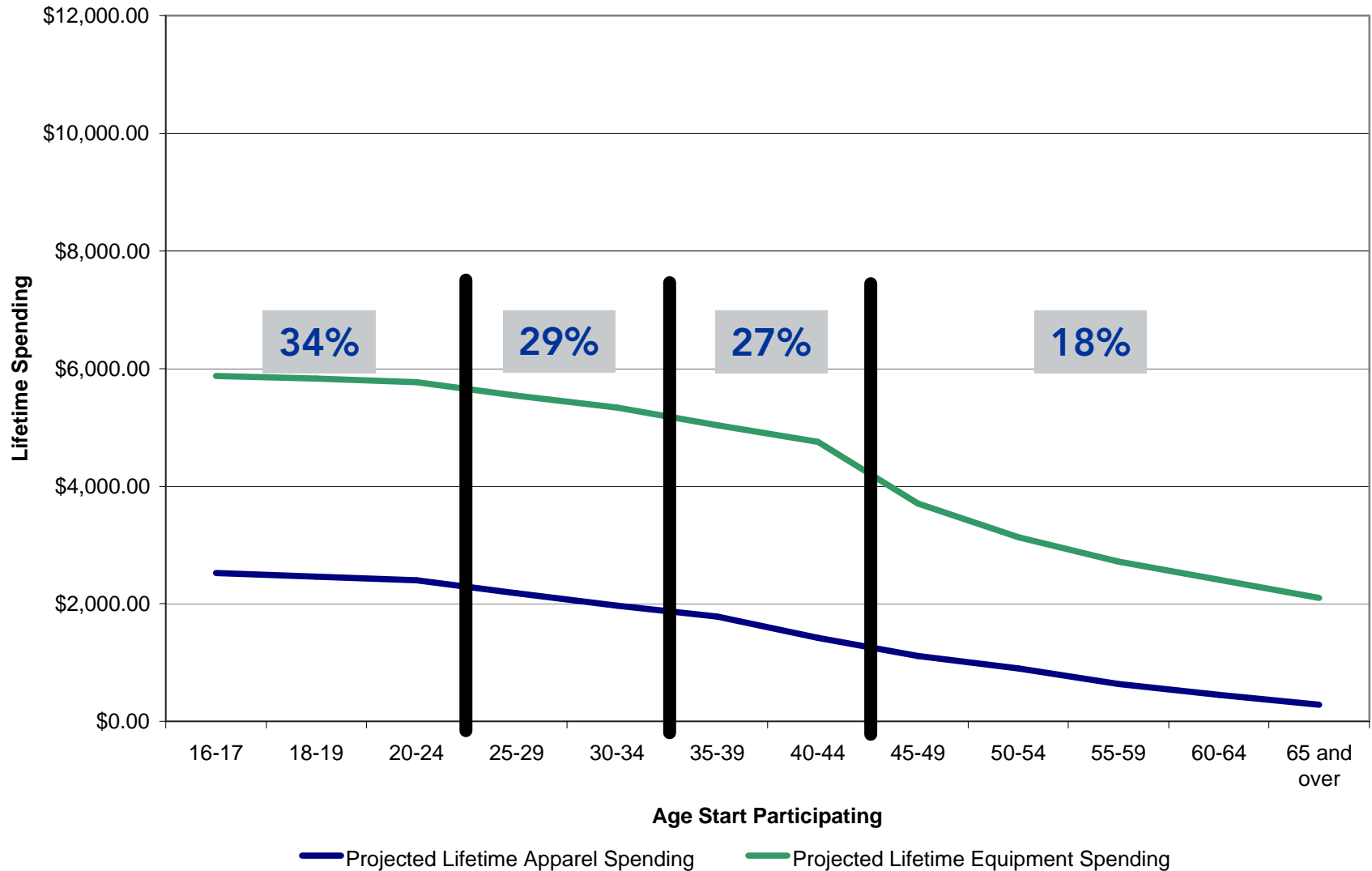
★ Are very similar in profile. However, there is potential to grow the Hispanic segment as well as those in the 35-45 range.

	<u>Total Interested (786)</u>	<u>Current Participants (326)</u>
Age		
16-24	30%	26%
25-34	19%	18%
35-44	25%	20%
45+	26%	36%
Average Age	35.4 years	37.6 years
Gender		
Male	50%	54%
Female	50%	46%
Race		
White	78%	83%
Hispanic	14%	7%
African American	3%	6%
Other	5%	4%
Education		
High School or Less	34%	35%
Some College	32%	33%
4 Year Degree +	34%	32%
Employed	67%	67%

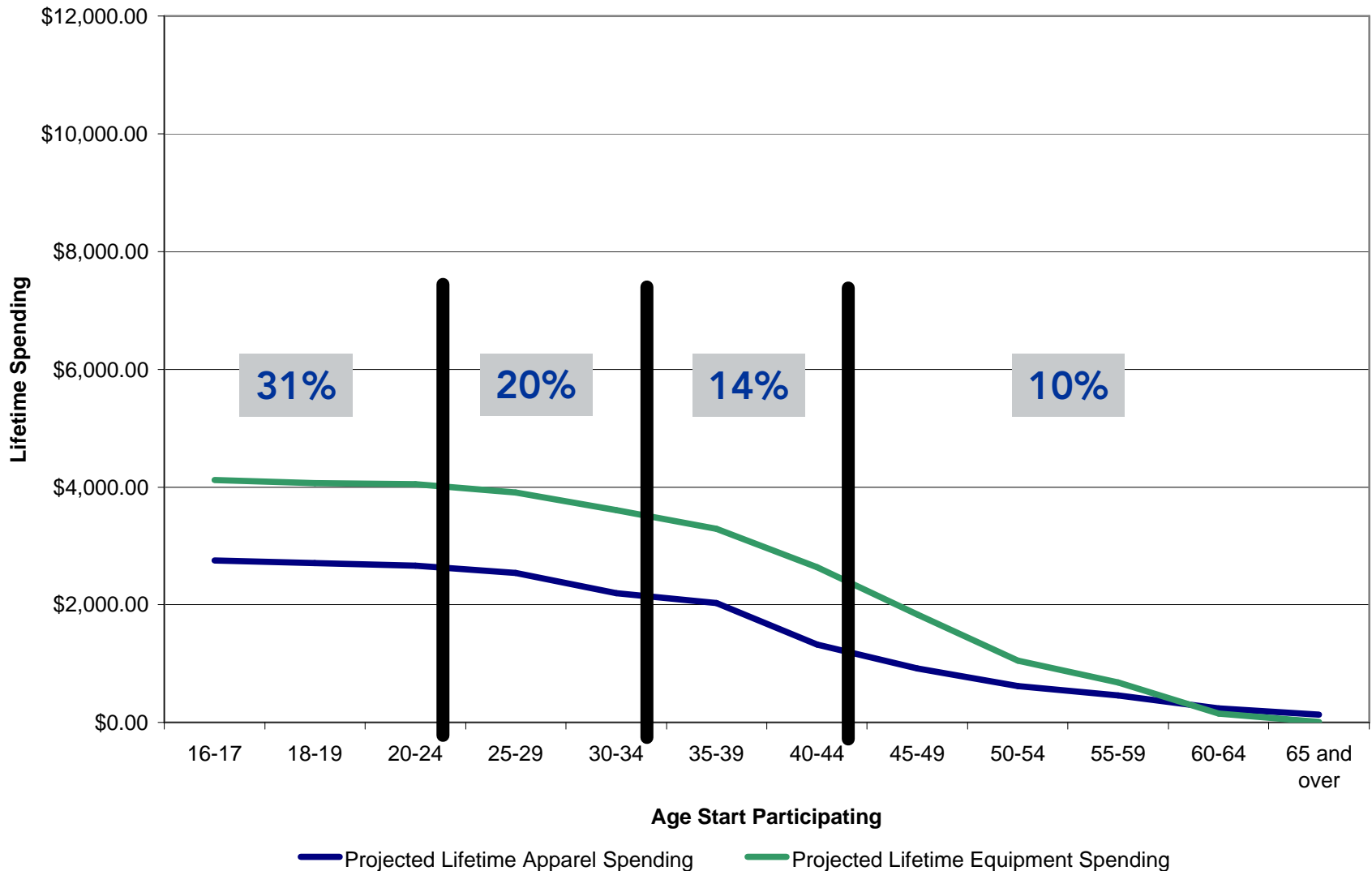
Paddlesport Respondent Demographic Profile

<u>Participants</u>	<u>Total Interested</u> (786)	<u>Current</u> (326)
Married/Living with Partner	53%	53%
Average # of Adults in Household	2.4	2.2
Have Children	50%	46%
Median Household Income	\$62,500	\$62,500
Type of Area Live		
Urban/City	23%	22%
Suburban	37%	34%
Small Town	24%	29%
Rural	15%	15%

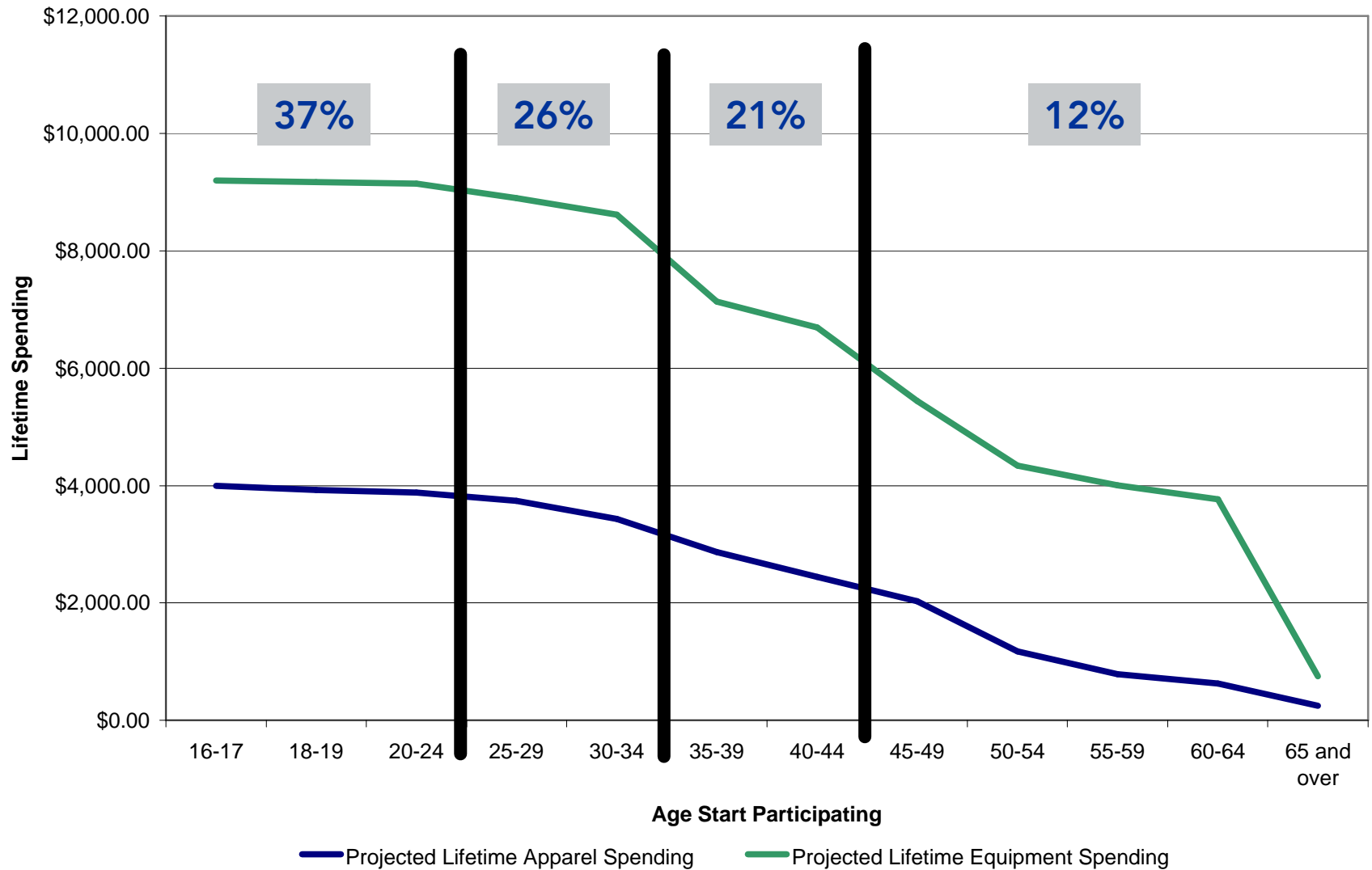
Projected Lifetime Spending: Canoeing



Projected Lifetime Spending: Kayaking



Projected Lifetime Spending: Rafting



Trail Running Respondent Demographic Profile

Compared to current participants, those interested in this activity for the first time:

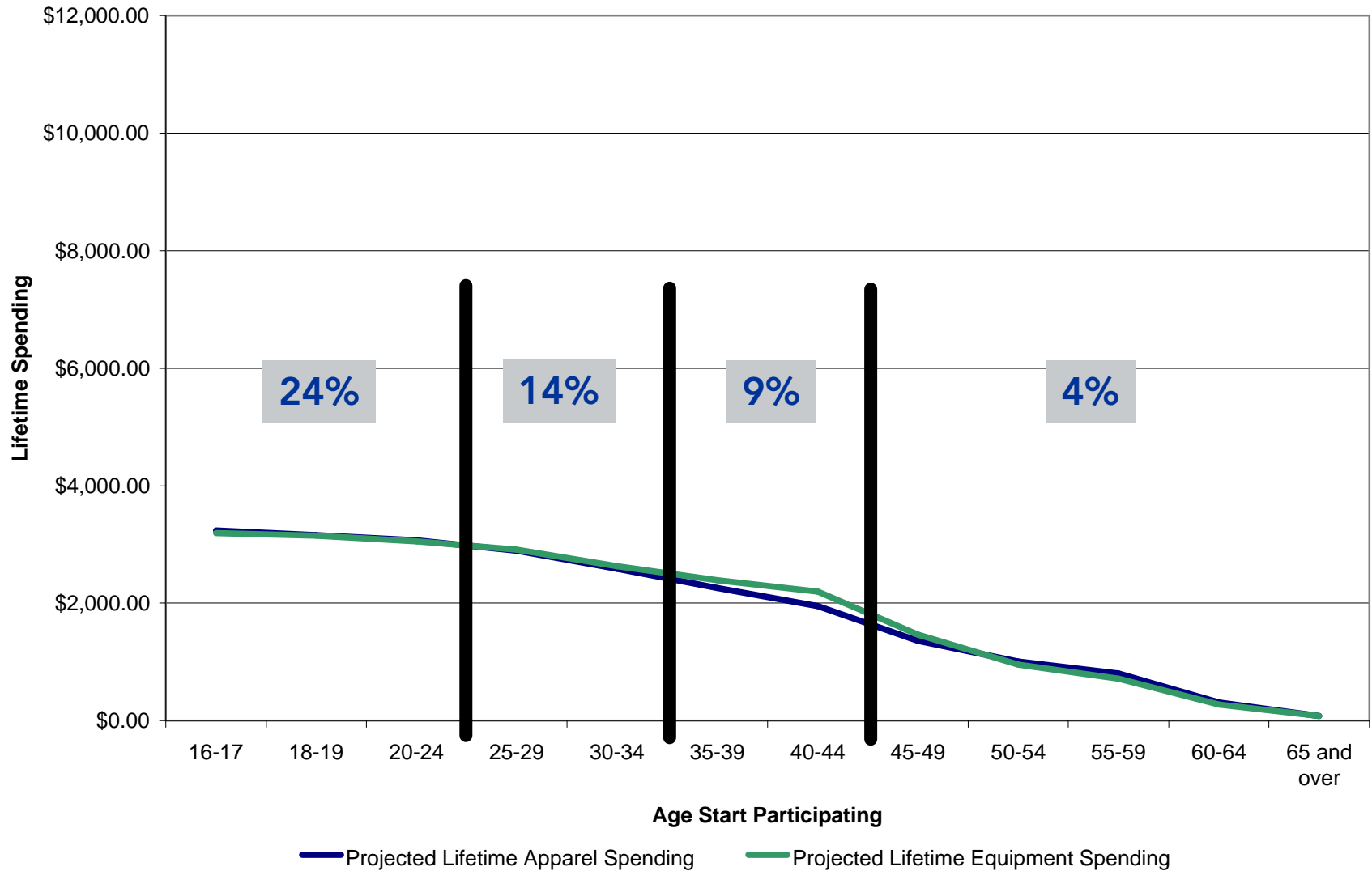
★ Skew female, and slightly older, with growing interest in the 25-34 range. They tend to be more educated, employed, living in small towns and more often married than current participants.

	<u>Total Interested (319)</u>	<u>Current Participants (444)</u>
Age		
16-24	29%	48%
25-34	29%	18%
35-44	22%	18%
45+	20%	16%
Average Age	33.7 years	30.3 years
Gender		
Male	50%	61%
Female	50%	39%
Race		
White	65%	66%
Hispanic	20%	19%
African American	9%	9%
Other	6%	6%
Education		
High School or Less	28%	38%
Some College	31%	31%
4 Year Degree +	41%	31%
Employed	65%	60%

Trail Running Respondent Demographic Profile

	<u>Total Interested</u> (319)	<u>Current Participants</u> (444)
Married/Living with Partner	57%	40%
Average # of Adults in Household	2.6	2.3
Have Children	47%	50%
Median Household Income	\$62,500	\$62,500
Type of Area Live		
Urban/City	38%	36%
Suburban	29%	34%
Small Town	26%	19%
Rural	7%	11%

Projected Lifetime Spending: Trail Running



Climbing

Respondent Demographic Profile

Compared to current participants, those interested in pursuing climbing:

★ Tend toward the 16-34 age groups and tend to have a lower median income than participants. There is growing interest among females. In ethnic groups, there is growing interest among Hispanics

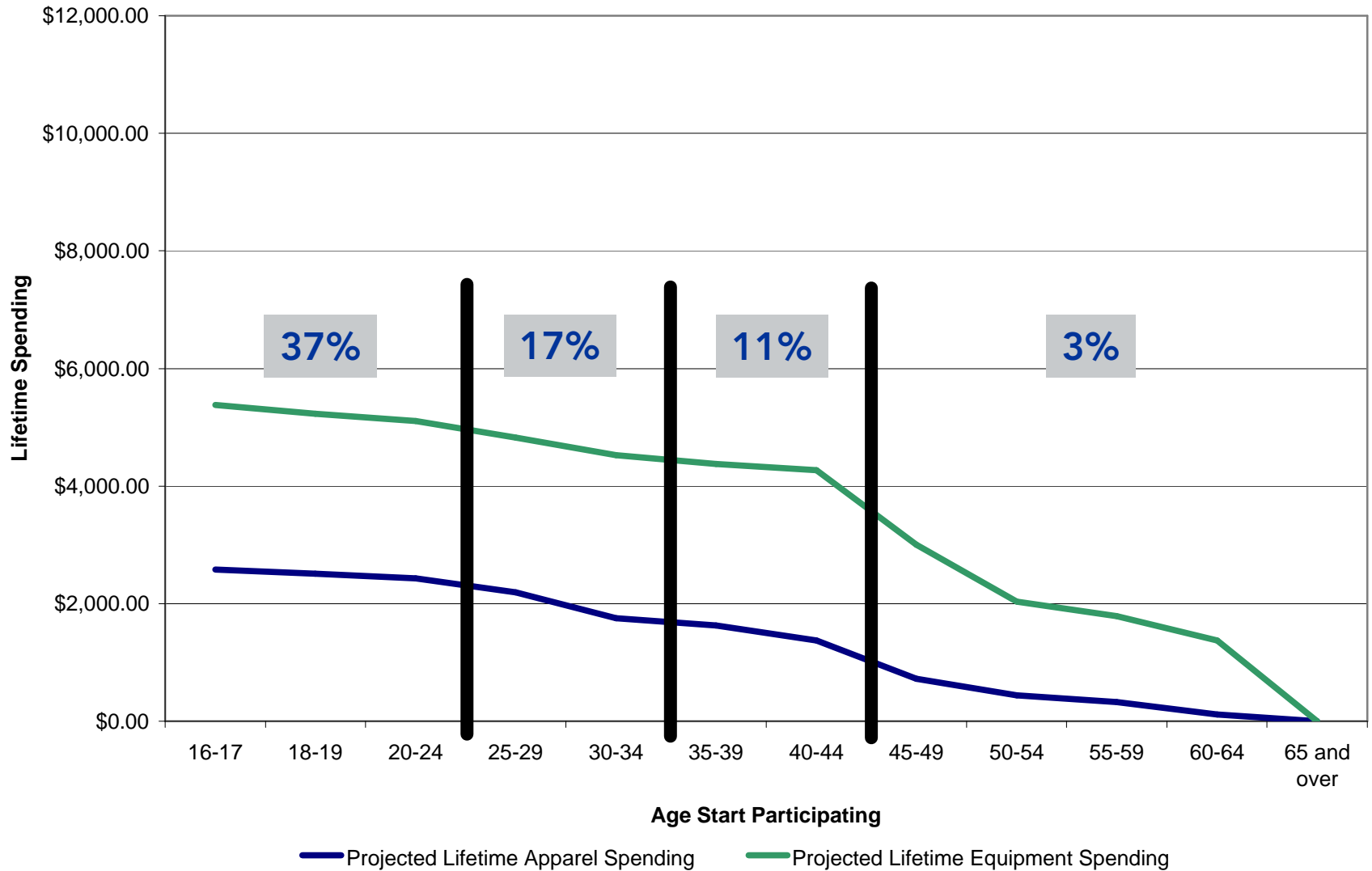
	<u>Total Interested (596)</u>	<u>Current Participants (405)</u>
Age		
16-24	45%	53%
25-34	25%	16%
35-44	21%	18%
45+	9%	13%
Average Age	29.0 years	28.9 years
Gender		
Male	54%	65%
Female	46%	35%
Race		
White	65%	72%
Hispanic	23%	17%
African American	7%	5%
Other	5%	6%
Education		
High School or Less	42%	44%
Some College	33%	32%
4 Year Degree +	25%	24%
Employed	65%	64%

Climbing

Respondent Demographic Profile

	<u>Total Interested</u> (596)	<u>Current Participants</u> (405)
Married/Living with Partner	41%	40%
Average # of Adults in Household	2.5	2.3
Have Children	53%	54%
Median Household Income	\$42,500	<u>\$62,500</u>
Type of Area Live		
Urban/City	33%	<u>27%</u>
Suburban	31%	34%
Small Town	25%	26%
Rural	10%	13%

Projected Lifetime Spending: Climbing



Snowshoeing

Respondent Demographic Profile

Compared to current participants, those interested in pursuing snowshoeing:

★ Tend to skew female with children, younger, less educated and urban. Those interested are less likely than current participants to be Caucasian, with a growing interest among African Americans.

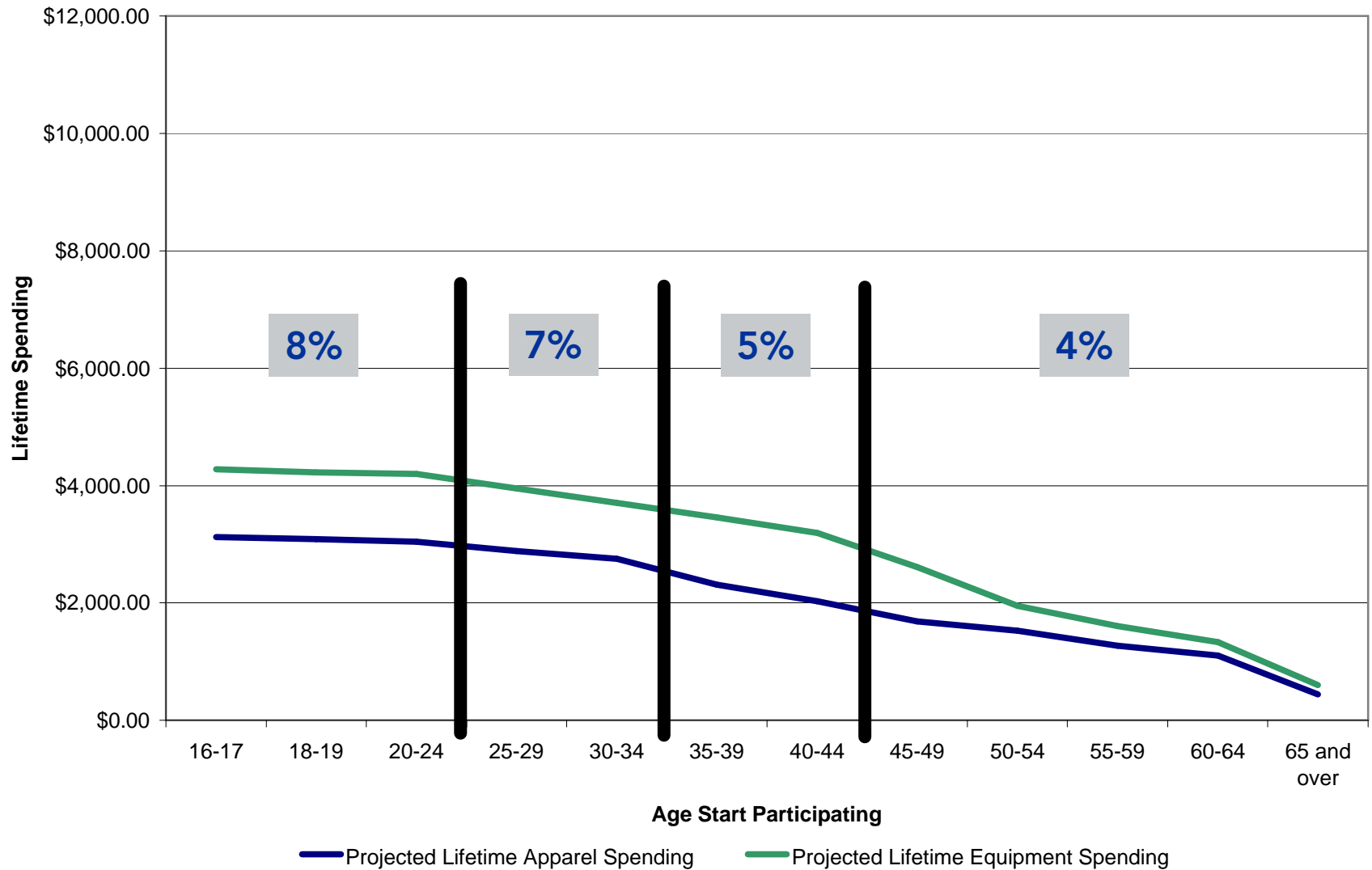
	<u>Total Interested (287)</u>	<u>Current Participants (131)</u>
Age		
16-24	31%	15%
25-34	21%	19%
35-44	20%	26%
45+	28%	40%
Average Age	34.7 years	41.0 years
Gender		
Male	51%	64%
Female	49%	36%
Race		
White	75%	85%
Hispanic	12%	13%
African American	8%	0%
Other	5%	2%
Education		
High School or Less	34%	31%
Some College	33%	18%
4 Year Degree +	33%	51%
Employed	68%	79%

Snowshoeing

Respondent Demographic Profile

	<u>Total Interested</u> (287)	<u>Current Participants</u> (131)
Married/Living with Partner	55%	60%
Average # of Adults in Household	2.2	2.1
Have Children	45%	31%
Median Household Income	\$62,500	\$62,500
Type of Area Live		
Urban/City	38%	23%
Suburban	28%	22%
Small Town	19%	29%
Rural	16%	26%

Projected Lifetime Spending: Snowshoeing



Snowboarding/Downhill Skiing Respondent Demographic Profile

Compared to current participants, those interested in pursuing snowboarding or downhill skiing:

★ Skew younger, female and single with some college or less.

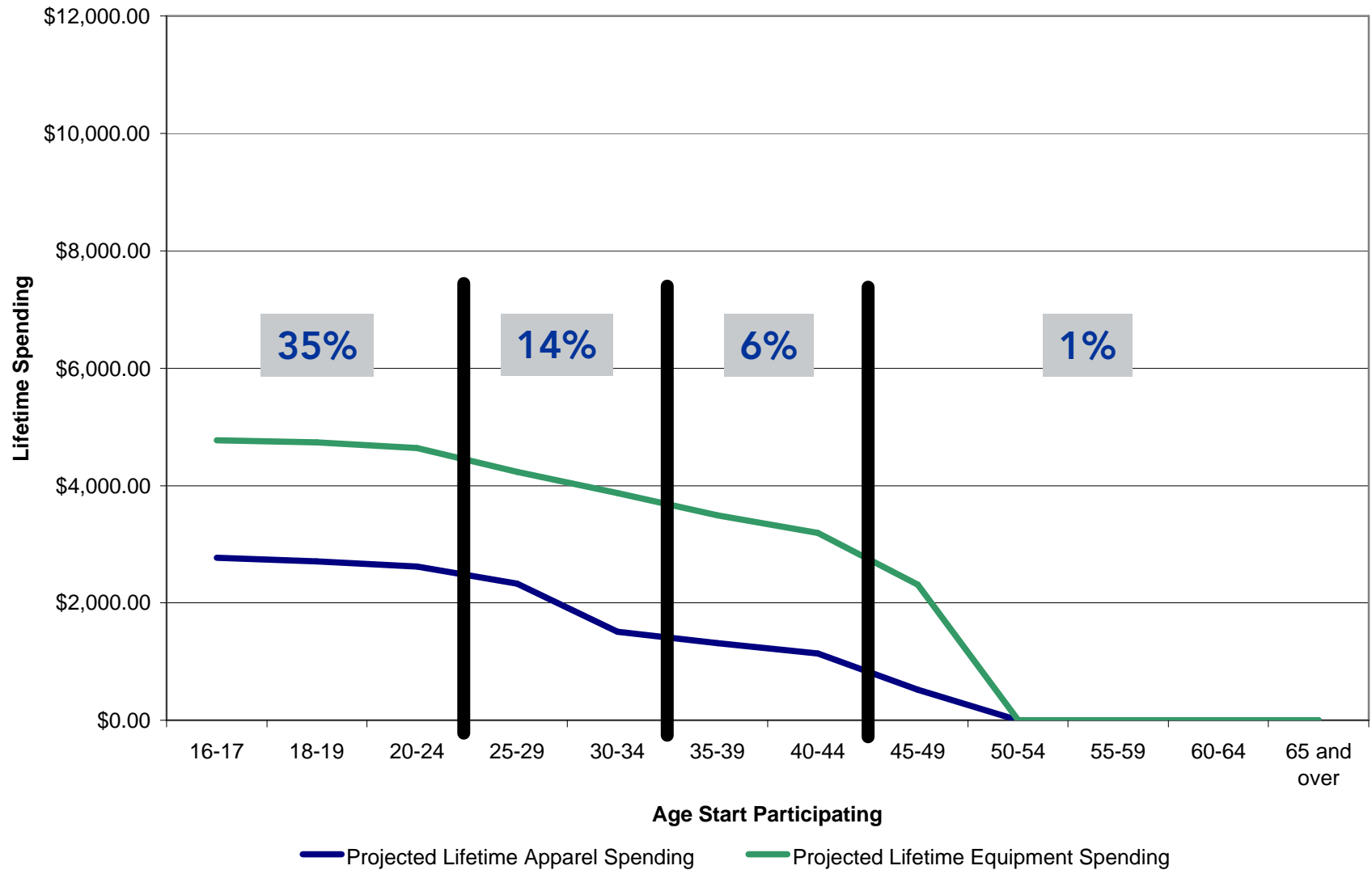
★ Less likely than current participants to be Caucasian with growing interest among Hispanics.

	Total Interested (422)	Current Participants (204)
Age		
16-24	49%	40%
25-34	18%	18%
35-44	20%	16%
45+	13%	26%
Average Age	27.4 years	28.6 years
Gender		
Male	55%	62%
Female	45%	38%
Race		
White	72%	85%
Hispanic	17%	6%
African American	5%	3%
Other	6%	6%
Education		
High School or Less	40%	35%
Some College	32%	26%
4 Year Degree +	28%	39%
Employed	61%	66%

Snowboarding/Downhill Skiing Respondent Demographic Profile

	<u>Total Interested (422)</u>	<u>Current Participants (204)</u>
Married/Living with Partner	36%	50%
Average # of Adults in Household	2.3	2.3
Have Children	55%	52%
Median Household Income	\$62,500	\$62,500
Type of Area Live		
Urban/City	30%	28%
Suburban	36%	35%
Small Town	26%	27%
Rural	8%	10%

Projected Lifetime Spending: Snowboarding



Projected Lifetime Spending: Downhill Skiing

