

OUTDOOR RECREATION PARTICIPATION STUDY

for the United States



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OUTDOOR RECREATION PARTICIPATION STUDY

INTRODUCTION

INTRODUCTION

Outdoor Industry Association (OIA) presents the **Outdoor Recreation Participation Study™**. This is the 6th edition of this annual report, produced for OIA by The Leisure Trends Group, tracking nationwide participation levels for Americans 16 and older in 21 human powered outdoor activities.

A TREND REPORT

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

METHODOLOGY SUMMARY

A more detailed methodology can be found on page 253

In summary, data for this study were collected as part of the LeisureTRAK®, an on-going study of Americans' leisure time behavior and attitudes. For comparative purposes, the quarterly data collected for this report have been aggregated on an annual basis for each of the years shown, 1998 through 2003. During 2003, 4,000 telephone interviews were conducted using scientific sampling and random digit dial methodology. The overall 2003 results are projectable to the American population, age 16 and over, with a **margin of error of +/- 1.6% at the 95% confidence level**.

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

SIGNIFICANCE TESTING



New Feature!

The Participation Study is a trend report and much of the value lies in the ability to compare recent results to the previous year – did participation go up, stay the same or decline; are the demographic characteristics of the Participant or Enthusiast population changing? Since it is not practical (or possible) to speak to all 220+ million Americans 16 and older each year for the Participation Study, the results from year-to-year are subject to some variance that is introduced by chance rather than reflecting a true change.

INTRODUCTION

SIGNIFICANCE TESTING (continued)

Significance testing is a statistical tool that is commonly used in research to determine if two results are actually different from one another or whether the difference represents a “numeric fluctuation” in the data that is the result of chance. **The Participation Study results in 2003 have been compared to 2001** results at the 95% confidence level – a stringent research industry standard. This means that if the study was conducted 100 times in year 2003, the same conclusion would be arrived at 95 out of those 100 times.

Increases and decreases in Participant/Enthusiast incidence or demographic profile characteristics that are significantly different can be identified as a true shift, with a high degree of reliability. Results that are not identified as being significantly different must be treated as being flat or unchanged because the numeric differences may be the result of chance – rather than representing an actual shift.

Throughout the report, year 2003 results that are significantly different from results reported in 2001 are noted with a ☐. For continuity reasons, the ☐ has been noted on the year 2003 results.

ROLLING AVERAGE



New Feature!

The primary purpose of the Participation Study is to identify Americans' participation in human powered activities on an annual basis – a specific point in time. The results of the research rightly fluctuate from year-to-year. Participant and Enthusiast levels increase and decline based on a number of factors that include among other dynamics, interest among Americans, follow-through among Americans, weather conditions, free time, activity accessibility, the economic environment, and elements of the research process itself.

The Year 2003 Participation Study features a new perspective that serves to smooth out the fluctuations that are noted year to year. A **rolling average** is a mathematical tool that takes into account not only the results from the current year, but also factors in the results from previous years.

Rolling Participant and Enthusiast trends have been reported this year both overall and for each activity. This provides a perspective that reveals the cumulative impact of Americans' involvement in human powered activities over the past several years.

ACTIVITY DEFINITIONS

Several of the activities tracked in this study are not self-explanatory to the general population. In an effort to provide consistent interpretation among all respondents, several of the activities are defined in greater detail to respondents during the survey process. The table below provides the definitions used for each activity during the data collection process.

***Please note: the term "core activities" refers to only the activities tracked since 1998.**

Activity	Tracked Since	Definition
Backpacking	1998	Backpacked more than a quarter of a mile from vehicle and stayed overnight (camped)
Bicycling - Paved Road	1998	Bicycling on a paved road
Bicycling - Single Track	1998	Bicycling on a dirt single track less than five feet wide
Bicycling - Wide Track	1998	Bicycling on a dirt road more than five feet wide
Bird Watching	2001	Bird watching excursion that involved traveling more than one-quarter of a mile from home
Canoeing	1998	No further explanation provided
Car Camping	1998	Camping less than one-quarter mile from vehicle
Camping (Away from Car)	1998	Camped out at least one-quarter of a mile from where you parked your vehicle
Climbing - Artificial Wall	2001	Climbing with a rope and harness on an artificial wall
Climbing - Ice	2001	Climbing with an ice axe on an extremely steep or vertical ice surface
Climbing - Natural Rock	2001	Climbing with a rope and harness on a natural rock surface outside
Cross-Country/Nordic Skiing	1998	No further explanation provided
Fly-Fishing	2001	Fishing with a rod and reel specifically designed for fly-fishing. Please consider that fly-fishing is different than spin-cast fishing where you might use live bait
Hiking	1998	Hiking on an unpaved trail
Kayaking - Recreation/St-on-Top	2001	No further explanation provided
Kayaking - Touring/Sea	2001	No further explanation provided
Kayaking - Whitewater	2001	No further explanation provided
Rafting	1998	No further explanation provided
Showshoeing	1998	No further explanation provided
Telemark Skiing	1998	Downhill with Telemark bindings that allow a free-heeled skiing experience
Trail Running	1998	Running on an unpaved trail

ENTHUSIAST & PARTICIPANT DEFINITIONS

Throughout this report, the population that is active in the tracked activities has been segmented into two populations – **Participants** and **Enthusiasts**. The distinction has been made because the demographic profiles and purchase behavior of people highly committed to an activity (**Enthusiasts**) often differ notably from those who can be more casual in their participation frequency (**Participants**). The criteria used to define the two groups are as follows:

Enthusiasts

Enthusiasts are the **most frequent** participants in an outdoor activity. They represent the core outdoor recreation market and are of the most interest to Outdoor Industry Association members. They are the Americans who purchase the majority of higher priced and technologically advanced outdoor products and services. They also use recreational facilities most often. *In many of the recreational activities reported in this study, the activity growth/decline shown from year-to-year is measurable among Enthusiasts. This is because the incidences are relatively small and even small shifts can have a large impact.*

Participants

The Participant market segment represents all Americans who, based on our description of an outdoor activity, believe they participated in that activity **at least one time** during the past year. Enthusiasts are included in this segment, but represent only a fraction of the total. Consequently, most Participants represent “potential” Enthusiasts. It is these potential Enthusiasts that often determine the level of growth of an activity.

Understanding the Results Among the Target Groups

When reviewing the findings of this study, it is important to understand how changes in the Enthusiast and Participant segments differ in their impact on the market potential of an outdoor activity. Companies, associations and services that need to understand trends among the core market of an activity need to focus on Enthusiasts, while those concerned with growing their businesses beyond the core should focus on Participants. In addition, changes to the Enthusiast market tend to impact the more technical and sophisticated merchandise they use, while changes to the Participant market tend to affect lower-cost and impulse purchases outside of the core business.

ENTHUSIAST FREQUENCY LEVELS DEFINED

Enthusiasts are the *most frequent* participants in an outdoor activity. Enthusiasts are defined as those Americans who report participating in a certain activity during the past 12 months within the top 15% of frequency levels mentioned by the Participant population for a given year.

Example

The population that reported participating in backpacking during the past 12 months was asked how many times they went backpacking during that time period. Responses ranged from one time to 100 times. Analysis was conducted to identify the threshold that represented the top 15% of frequency mentions. People who went backpacking at a level within the top 15% of all frequencies reported are identified as Enthusiasts. In 2003, the top 15% of backpacking participation frequencies was six times or more.

The following table is provided for further explanation:

Number of Times Backpacked in Past 12 Months	Percent of Mentions	Cumulative Percent of Total Responses
1 time	35.2%	31.2%
2 times	26.4%	61.6%
3	8.2%	69.8%
4	10.3%	80.1%
5	4.6%	84.7%
6	0.9%	85.6%
7	4.5%	90.1%
8	2.4%	92.5%
10	2.6%	95.1%
12	0.4%	95.5%
13	0.5%	96.0%
15	0.3%	96.3%
15	0.9%	97.2%
16	0.5%	97.7%
25	0.5%	98.2%
30	0.5%	98.7%
72	0.5%	99.2%
80	0.5%	99.7%
100	0.3%	100.0%

Backpacking Enthusiasts:
six times or more

ENTHUSIAST FREQUENCY LEVELS BY ACTIVITY

By definition, Enthusiast levels are not rigid and cannot be standardized. Depending on the actual frequency levels reported each year, the threshold level for Enthusiast definitions are subject to change. Several dynamics may impact the threshold level used to define Enthusiasts. For example, the number of times that people go Telemark skiing is likely to be much higher in a good snow season than in a season when snowfall is very low. **The changes in Enthusiast definitions does not limit the impact of comparative analysis. Enthusiasts are always the most committed Participants, registering the highest relative frequency levels in any given year.**

The Enthusiast definitions used in this document are shown below. Note that for the most part, only minor shifts in the definitions have occurred from year-to-year.

	Enthusiast Levels - Top 15% of Annual Participation Frequency				
Activity	<u>1998/99</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>
Backpacking	9 or more times	7 or more times	7 or more times	6 or more times	6 or more times
Bicycling - Paved Road	50+	52+	55+	51+	49+
Bicycling - Single Track	25+	25+	27+	26+	20+
Bicycling - Wide Track	30+	30+	25+	25+	20+
Bird Watching	NA	NA	20+	26+	20+
Camping (Away from Car)	NA	12+	8+	7+	7+
Canoeing	9+	5+	6+	7+	6+
Car Camping	10+	7+	5+	8+	7+
Climbing - Artificial Wall	NA	NA	12+	12+	9+
Climbing - Ice	NA	NA	4+	8+	2+
Climbing - Natural Rock	NA	NA	10+	12+	11+
Cross-Country/Nordic Skiing	9+	6+	8+	9+	8+
Fly-Fishing	NA	NA	13+	16+	15+
Hiking	13+	12+	14+	14+	14+
Kayaking - Recreation/St-on-Top	NA	NA	6+	10+	7+
Kayaking - Touring/Sea	NA	NA	6+	7+	6+
Kayaking - Whitewater	NA	NA	7+	5+	3+
Rafting	4+	2+	4+	5+	3+
Snowshoeing	9+	10+	12+	5+	6+
Telemark Skiing	13+	5+	8+	11+	6+
Trail Running	48+	48+	48+	51+	49+

OUTDOOR RECREATION PARTICIPATION STUDY
SIX YEAR PERSPECTIVE

2003 Compared to 1998

OVERVIEW: 2003 COMPARED TO 1998

Owning Space on the Leisure Landscape

Participation in human powered activities is up from 1998 levels.

It goes without saying that the American leisure landscape has changed dramatically since 1998. While many of the changes in the past 6 years appear to work against participation in human powered activities, they have not only held their ground, but in fact have gained ground since 1998.

- New options have exploded on the scene (video gaming, internet speed)
- Outdoor areas have been diminished (urban sprawl)
- The costs associated with outdoor participation have risen (access fees)
- The availability of economic resources to devote to leisure activities face pressure (recession and unemployment)
- The convenience associated with traveling to distant outdoor areas has been complicated (airline regulations)

Yet a comparison of overall participation levels reveals that human powered activities are more popular in 2003 than in 1998 among Americans 16 and older. The incidence of participation in at least one of the core outdoor activities has increased 8% over 1998 levels.

The year 2003 overall Participant population is larger by 16 million Americans than in 1998 – far outpacing the impact of natural population growth in the United States.

Gains in commitment to human powered activities has surpassed the general interest that Americans have for outdoor activities. The overall Enthusiast incidence is up 20% in 2003 compared to 1998 – yielding a population that is nearly nine million people stronger.

OWNING AMERICAN'S TIME

As participation in outdoor activities has shifted, so has the type of Americans who are drawn to the activities. Compared to six years ago, males are increasingly represented within the overall Participant and Enthusiast population. Ethnic diversity is slowly taking hold. The percentage of Caucasians within the overall Participant and Enthusiast populations has declined moderately. The increased popularity of outdoor activities may be linked to family participation. The percentages of overall Participants who report the presence of children in their household is significantly higher than in 1998.

Overall, the long-term view reflects favorably on the health of the outdoor industry – compared to six years ago more Americans are participating in human powered activities and are doing so at more frequent levels within each respective year.

SIX YEAR PERSPECTIVE: KEY FINDINGS

Participation

- In 2003, nearly two-thirds of Americans 16 and older participated in at least one of the core human powered activities, a Participant level up 8% from 1998 when 59.9 million were identified as a Participant. The Participant base has grown by 16 million Americans to nearly 142 million in 2003 – outpacing natural population growth by a wide margin
- In 2003, four activities show Participant levels that are higher than in 1998:
 - Canoeing (+18.6%)
 - Snowshoeing (+92.9%)
 - Telemark skiing (+216.7%)
 - Trail Running (+15.5%)
- Overall trends reveal participation in many activities is stable. The following activities are considered strong:
 - Single Track Bicycling
 - Car Camping/Camping away from the Car
 - Canoeing
 - Cross Country/Nordic Skiing
 - Hiking
 - Kayaking (all types)
 - Rafting
 - Snowshoeing
 - Telemark Skiing
 - Trail Running
- In 2003, commitment to human powered activities as measured by Enthusiast levels are also up since 1998. One in five (19.5% or 42.9 million) Americans 16 and older participated in at least one of the core outdoor activities in 2003 at Enthusiast levels. Comparatively, overall Enthusiast activity was reported in 1998 by 16.2% (or 34.1 million) Americans 16 and older.

SIX YEAR PERSPECTIVE: KEY FINDINGS (continued)

- A wide range of activities have experienced an increase in Enthusiast levels compared to 1998:
 - Paved road bicycling (+28.3%)
 - Single track bicycling (+150%)
 - Dirt road bicycling (+87.5%)
 - Rafting (+80.0%)
 - Snowshoeing (+400%)
 - Telemark skiing (+200%)
 - Trail running (+36.8%)
- Only one activity has a lower Enthusiast level in 2003 than in 1998 – backpacking (-20%)
- When compared to 1998, Enthusiast levels are primarily unchanged in 2003 for the following activities:
 - Car camping
 - Canoeing
 - Natural rock climbing
 - Cross-Country /Nordic skiing
 - Hiking

Demographics

- The face of overall Participants and Enthusiasts has changed in some key areas over the past six years:
 - Males are increasingly represented within the overall Participant and Enthusiast populations. In 1998, one-half (50%) of overall Participants were male, a gender representation that has increased to 56% in 2003. The gender disparity is even greater among the overall Enthusiast population. More than one-half (56%) of overall 1998 Enthusiasts were male compared to nearly two-thirds (64%) in 2003.
 - Although moderate, the overall 2003 Participant and Enthusiast populations show favorable movement toward ethnic diversity. When compared to 1998, the representation of Caucasians within the overall Participant (84% to 80%) and overall Enthusiast (87% to 83%) has declined in 2003.

SIX YEAR PERSPECTIVE: KEY FINDINGS (continued)

16-24 Year Olds

- Overall participation in outdoor activities (80.1%) has increased from 1998 (77.8%) among young Americans (16 to 24), but overall Enthusiast levels have remained unchanged
- Among the core set of human powered activities, young (16 to 24) Americans have contributed to the growth over the past six years of two activities in particular:
 - Telemark skiing Participant levels have increased 310% and Enthusiast levels have grown similarly (+350%)
 - Participant levels in trail running have grown 15.7% and Enthusiast levels have increased 27.5%

Females

- In 2003, female Americans are participating in at least one of the core human powered activities at greater levels than in 1998 – an overall Participant incidence that has gone from 53.4% to 57.3%.
- Enthusiast activity in at least one of the core outdoor activities is also up in 2003 (14.6%) compared to 1998 (11.8%).
- Snowshoeing in particular has grown in popularity among female Americans since 1998. The Participant level has increased 163% to 2.1% of females 16 and older and gains in Enthusiast levels have been even more dynamic (+200%).
- Paved road bicycling and car camping are two other activities that have experienced significant growth in female Enthusiast activity when 2003 levels are compared to 1998.

OUTDOOR RECREATION PARTICIPATION STUDY
THREE YEAR PERSPECTIVE
2003 Compared to 2001

OVERVIEW: YEAR 2003 COMPARED TO 2001

Shifting Focus

Overall participation is down, but commitment to outdoor activities remains strong.

The onset of world events, mother nature's wrath and economic pressures that have happened since the watershed year of 2001 may have created obstacles to outdoor participation among Americans 16 and older, but the passion that Participants have for activities continues to be strong.

In 2003 outdoor human powered activities remain popular among Americans 16 and older, but not as strongly as in 2001. Two thirds (66.3%) of Americans 16 and older participated in at least one human powered activity in 2003, a population equal to nearly 146 Participants.

Despite the impressive size of the population, participation is lower than in 2001 when more than two-thirds (69.2%) of Americans participated in human powered activities.

Encouragingly, despite the decline in overall participation, commitment to outdoor activities (as measured by Enthusiast incidence) has remained aligned with 2001. This dynamic suggests that although fewer Americans are participating, those who are, continue to participate at frequent levels.

Two key population segments show divergent trends. The interest of young Americans (16 to 24) has been maintained. Participant and Enthusiast levels among 16 to 24 year-olds are unchanged when compared to 2001. **Despite warnings of growing child obesity and the growth of video games, outdoor activities continue to hold the interest of young Americans.** Involvement in outdoor activities among females is not as favorable. Compared to 2001, Participant and Enthusiast levels among female Americans are lower in 2001. (It should be noted that Enthusiast activity in 2003 increased from the previous year – suggesting that involvement among Females is on the rebound).

Year 2003 Participants and Enthusiasts are more likely to be male. The Participant population is younger in 2003 than in 2001. Yet the Enthusiast population has aged (median) by nearly five years. Is participation among younger Americans more casual, leaving Enthusiast activity to older Americans with greater resources and time to devote to outdoor activities?

Overall interest in outdoor activities is lower in 2003 than in 2001, but the outdoor industry has effectively maintained the committed activity of Americans 16 and older who are participating.

THREE YEAR PERSPECTIVE: KEY FINDINGS (continued)

- The most dynamic shifts in the demographic profile of Participants and Enthusiasts had taken place by 2001, yielding a 2003 population with a profile in general alignment with their 2001 counterparts. However, some important differences are noted between Americans participating in outdoor activities in 2001 and 2003:
 - In 2003, overall Participants and Enthusiasts are more likely to be males than in 2001. In 2001, more than one-half (53%) of overall Participants were male, a gender representation that has increased moderately, yet significantly, to 56% in 2003. The gender disparity is even greater among the overall Enthusiast population. More than one-half (56%) of overall 1998 Enthusiasts were male compared to nearly two-thirds (64%) in 2003.
 - The age profiles of Participants and Enthusiasts show divergent results. The overall Participant population has become younger in 2003. The median age of overall Participants has dropped from 39.5 in 1998 to 35 in 2003. Enthusiasts show an opposite trend. The median age of overall Enthusiasts in 2003 is 34, compared to 29.5 in 2001.

16-24 Year Olds

- Compared to 2001, overall Participant and Enthusiast levels among young Americans (16 to 24) are unchanged.
- With the exception of declines noted in natural rock climbing and cross-country/Nordic skiing, Participant levels for all activities are flat with 2001 levels
- Enthusiast activity is higher among young Americans in camping (away from the car) and Telemark skiing. Enthusiast backpacking, cross-country/Nordic skiing and touring/sea kayaking activity is down in 2003 when compared to 2001 levels

Females

- In 2003, a lower percentage of female Americans are participating in at least one human powered activity than in 2001– an overall Participant incidence that has declined from 63.4% to 59.4%
- There are no human powered activities in 2003 that have increased female Participant levels over 2001
- Paved road bicycling is the sole activity to significantly increase female Enthusiast activity when 2003 levels are compared to 2001

THREE YEAR PERSPECTIVE: KEY FINDINGS

- The fastest growing activities OIA tracks, in order of the highest average incidence, over the years 2001-2003:
 - Snowshoeing +4%
 - Climbing (ice, artificial rock) +23.7%, +4%
 - Kayaking (recreational, all types) +15.2%, +5.2%
 - Camping +.5%
 - Road biking -.6%
 - Hiking -.8%
- In 2003, only one activity shows a Participant level that is higher than in 2001 – recreation/sit-on-top kayaking
- Declines are noted across a wide range of activities:

- Backpacking	- Natural rock climbing
- Single track bicycling	- Cross-country/Nordic skiing
- Dirt road bicycling	- Hiking
- Bird watching	- Whitewater kayaking
- Trail Running	- Rafting
- Remaining activities show Participant levels that are on par with 2001
- The following activities have remained at Enthusiast levels reported in 2001. (2003 - 21.3%, 2001-21.8%)
Maintaining a population of slightly less than 47 million human powered activity Enthusiasts.

Paved road bicycling	Fly-fishing
Single track bicycling	Touring/sea kayaking
Dirt road bicycling	Rafting
Bird watching	Snowshoeing
Car camping	Telemark skiing
Artificial wall climbing	Trail running
- **No** human powered activity in 2003 has pushed its Enthusiast level higher than any activity in 2001.

OUTDOOR RECREATION PARTICIPATION STUDY

SHORT-TERM TRENDS

2003 Compared to 2002

SHORT TERM TRENDS: OVERVIEW

Finding the Comfort Zone

American participation returns, driven by the familiar and the family-friendly

YEAR 2003 was a strong year for participation in human powered activities. The number of Americans 16 and older who participated in at least one human powered activity was impressively large and remained aligned with the previous year. But overall Enthusiast activity surged during the year as Americans committed greater time and effort to the human powered activities in which they participated.

Natural and societal events in recent years have worked to hold down overall Participant and Enthusiast participation in human powered activities. The economy has sustained a prolonged downturn. High unemployment rates have shown no signs of easing. Terrorism and war have created a sense of fear and inconvenience associated with air travel. The events of 9/11 and the start of the war in Iraq has weighed heavily on the psyche of Americans – creating a higher premium on spending time with family and friends. Weather patterns have been extreme and unfavorable in many ways – summer droughts and heat, low or crippling heavy snowfalls, wildfires, hurricanes and momentous storms. Physical inactivity is approaching crisis levels – obesity is poised to surpass heart disease as the number one factor that leads to death among the American population. Electronic media is evolving at dynamic rates – high definition TV, video games, the Internet – almost giving Americans a reason to stay inside and experience life through pixel colored glasses.

The American population is resourceful and in 2003 commitment to human powered activities returned with a passion in a more focused set of activities than in recent years. While Participant levels remained flat from 2002, the number of Americans participating at Enthusiast levels spiked from the year previous. And the increase in committed participation came from unexpected, yet familiar, sources. Several activities experienced increases in participation, while the buzz came off of previously identified “emerging activities.”

A recent trend of gravitation to “emerging activities” such as rock climbing and whitewater kayaking stalled in 2003. Mostly because those activities require special skills, venues and equipment did they experienced declines during the year. But the participation slack was picked up by two activities in particular. **Car camping and paved road bicycling both experienced significant increases in Participant and Enthusiast activity during the year.** Notably, these two activities share similarities that fit the mood of the American population 16 and older in 2003. Both activities are familiar, affordable, family-oriented, accessible, and not overly physically demanding. In short, year 2003 was a year where Americans 16 and older sought out the Comfort Zone.

SHORT TERM TRENDS: OVERVIEW (continued)

Finding the Comfort Zone (continued)

American participation returns, driven by the familiar and the family-friendly

As a positive sign for the health of the industry, human powered activities remained popular among America's youth. Research shows that continued involvement in human powered activities is born out of participation at a younger age; capture their interest at a young age and you are more likely to retain them for life.

Driven by increased commitment in an eclectic set of activities that are not just limited to adrenaline-rushing activities, overall Enthusiast levels among Americans between the ages of 16 and 24 grew in 2003.

The ethnic composition of the youth Participant and Enthusiast populations continues to reflect strong representation of non-Caucasian Americans, suggesting that the lure of human powered activities is crossing ethnic lines and reaching a broader base of young Americans.

Other Notable 2003 Dynamics

- The majority of female Americans continue to participate in human powered activities – although there are signs that growing interest among females that has been identified in recent years is on the wane. Overall Participant activity is down in 2003 among females 16 and older and overall Enthusiast activity has leveled off.
- Vacations inspired by the opportunity to participate in outdoor activities were on the rise in 2003; activities ranging from backpacking/hiking to snowshoeing benefited from the travel activity.

YEAR 2003 vs. 2002 OBSERVATIONS AND IMPLICATIONS

Year 2003 Events of Note

Observation/Implication

The 2003 climate in the U.S. was wetter and cooler than average in the East and warmer and drier than average in the West.



Overall Participant levels are flat.

Drought conditions worsened throughout much of the North Central and West regions.



Paddlesport participation declined or remained flat.

The summer brought another destructive wildfire season in the West – California, Colorado and Arizona particularly.



Backpacking activity was off, hiking and camping (away from car) activity was flat.

The Iraq war began on March 20th.



Participant Study results show a decline in participation in the April, May and June time periods.

The rate of unemployment rose to recent record high levels.



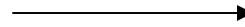
Economical activities were up – paved road bicycling, car camping.

YEAR 2003 vs. 2002 OBSERVATIONS AND IMPLICATIONS (continued)

Year 2003 Events of Note

Observations/Implication

Lance Armstrong wins his fifth consecutive Tour de France – with unprecedented live coverage on television.



Paved road bicycling participation Enthusiast levels spike.

LeisureTRAK® shows a strong spike in the value Americans place on spending time with family since 9/11.



Family-oriented activities were strong in 2003 – paved road bicycling, car camping.

The composition of several human powered activities show signs of moderate shifts towards increasing ethnic diversity.



Outdoor Industry Association's *Exploring the Active Lifestyle* report identifies participants as primarily Caucasian with 24% of the participant population being another race.

Youth commitment to human powered activities (including more mainstream activities) surged in 2003.



Outreach programs designed to motivate the participation of America's youth should reach a receptive target population.

SHORT TERM TRENDS: KEY FINDINGS

Participants

- More than two-thirds (66.3%) of Americans 16 and older participated in at least one of the human powered activities – a Participant population that is equal to nearly **146 million** Americans.
- In 2003, the human powered activities that drew the largest numbers of Americans 16 and older are those with broadbased appeal, simple accessibility, affordability, familiarity and only slight physical demands:
 - Paved road bicycling (77.8 million)
 - Hiking (71.6 million)
 - Car camping (53.0 million)
- The demographic profile of year 2003 overall Participant population reveals several key dynamics – two of which reflect a notable shift from 2002:
 - Males comprise the majority (56%) of the Participant population – more so than in previous years
 - Year 2003 Participants are more likely to report the presence of children in their household than in 2002
 - Americans of all ages participated in human powered activities in 2003 - median age is 35.0 years
 - Overall Participants are of slightly above average affluence – mean household income of \$59,000
 - The overall Participant population remains comprised primarily of Caucasian Americans (80%)

In year 2003, the Participant levels of specific activities differed, as a limited set of activities showed increases and the momentum enjoyed by emerging activities in previous years stalled.

- Compared to 2002, participation in several human powered activities declined in 2003 – including several of the adrenaline/emerging activities that had grown dynamically in recent years:

Ice Climbing (-72.7%)

Whitewater kayaking (-55.6%)

Natural rock climbing (-32.3%)

Cross-country/Nordic skiing (-30.6%)

Touring/Sea kayaking (-27.8%)

Artificial wall climbing (-17.1%)

Bird watching (-13.1%)

Single track bicycling (-9.6%)

- Americans 16 and older who participated in human powered activities in 2003 are more likely to live in a state located in the South region of the U.S.

Enthusiasts

Enthusiast activity surged in 2003. Americans devoted more time and effort to human powered activities than in 2002.

- The spike in Enthusiast activity experienced in 2003 is the result in part of more focused and narrowed participation behavior among Americans 16 and older – a fewer number of activities participated in at high frequency levels.
- In 2003, nearly **47 million** Americans 16 and older participated within the top 15% of participation frequency in at least one human powered activity – An increase of 11.5% from 2002.
- The activities that enjoy the largest Enthusiast populations in 2003 include paved road bicycling (14.9 million), hiking (10.5 million) and car camping (8.6 million).
- In 2003 Enthusiast levels are up for two activities – the same two activities that experienced an increase in Participant activity:
 - Paved road bicycling (+30.8%)
 - Car camping (+30.0%)
- The incidence of Enthusiast activity declined measurably for three activities:
 - Ice climbing (-50.0%)
 - Whitewater kayaking (-50.0%)
 - Backpacking (-46.7%)
- Year 2003 overall Enthusiasts have a distinct demographic profile:
 - Strong male skew (64%)
 - Representation of all age groups, with a younger population in 2003 (median of 34 years) than in 2002 (39.5)
 - Nearly one-half (47%) of Enthusiasts report the presence of children 18 and younger in the household
 - Moderate affluence – mean household income of \$59,000
- 2003 Enthusiasts are most likely to live in the South (30%) or West (27%) region of the U.S- areas that have climates conducive to year-round participation.

16-24 Year Old Participants

**The clear majority of Americans 16 - 24 years old participated in human powered activities in 2003
Participants – levels unchanged from 2002.**

- More than **32 million** Americans between the ages of 16 and 24 participated in at least one human powered activity in 2002
- The demographic profile of year 2003 Participants is notable on two dimensions:
 - Gender composition that skews male
 - Signs of growing ethnic diversity

Year 2003 Participant levels show a mix of changes and stability when compared to the previous year.

- Participant activity declined in a limited set of activities, notably emerging activities that young Americans had been joining in recent years:
 - Natural rock climbing (-25.9%)
 - Ice climbing (-66.7%)
 - Touring/Sea kayaking (-40.3%)
 - Whitewater kayaking (-59.4%)
 - Cross-country/Nordic skiing (-41.3%)
- Two activities experienced increases in Participant activity in 2003:
 - Car camping (+10.9%)
 - Telemark skiing (+64%)
- The remaining human powered activities showed a flat Participant trend when compared to 2002 - either directional increases/decreases shown or levels that are unchanged.

16-24 Year Olds Enthusiasts

Overall Enthusiast level activity among 16 to 24 year old Americans in 2003 was up significantly from 2002 levels and equal to with the largest population measured in 2001.

- More than **32 million** Americans between the ages of 16 and 24 participated in at least one human powered activity in 2003
- Nearly three-quarters (70%) of year 2003 Enthusiasts are male.
- A core set of activities experienced increases in Enthusiast activity in 2003:
 - Telemark Skiing (+80.0%)
 - Car camping (+70.8%)
 - Artificial wall climbing (+66.7%)
 - Canoeing (+33.3%)
 - Rafting (+133.3%)
- Despite the overall surge in committed activities, several activities experienced declines in Enthusiast participation in 2003:
 - Backpacking (-68.8%)
 - Cross-country/Nordic skiing (-60.0%)
 - Snowshoeing (-88.9%)
 - Touring/Sea kayaking (-66.7%)
 - Whitewater kayaking (-80.0%)
- The remaining human powered activities showed a flat Enthusiast trend when compared to 2002 - either directional increases/decreases shown or levels that are unchanged.

Female Participants

Although female participant activity declined for the second consecutive year, a large population of 67.6 million women took part in at least one human powered activity in 2003.

- Participant activity among females is down 5% from 2002 levels.
- Females of all ages participated in human powered activities during 2003 with a median age of 37. (Older than the average age of the overall participant.

A greater number of activities lost female participants than those activities that experienced gains.

- Compared to 2002, year 2003 Participant levels declined in an eclectic group of activities:
 - Bird watching (-24.1%)
 - Natural rock climbing (-41.2%)
 - Ice Climbing (-66.7%)
 - Whitewater kayaking (-50%)
 - Cross-country/Nordic skiing (-32.1%)
- Paved road biking showed the only increase in female participant activity (+9.4%)
- The remaining human powered activities showed a flat Participant trend when compared to 2002 - either directional increases/decreases shown or levels that are unchanged.

Female Enthusiasts

Despite a drop-off in Participant activity, in 2003 the number of female Enthusiasts remains sizeable and aligned with previous years.

- Nearly **18 million** female Americans 16 and older are classified as an Enthusiast in one of the activities based on their high levels of participation frequency in 2003.
- The age profile of year 2003 Enthusiasts is very balanced – yielding a median age of 35.

Year 2003 Enthusiast levels show a mix of shifts and stability when compared to the previous year.

- Increased Enthusiast activity is shown in three activities:
 - Paved road bicycling (+42.1%)
 - Car camping (+42.9%)
 - Snowshoeing (+200.0%)
- Significant erosion in Enthusiast activity is limited to three activities:
 - Bird watching (-38.5%)
 - Fly-fishing (-80.0%)
 - Backpacking (-50.0%)
- The remaining human powered activities showed a flat Enthusiast trend when compared to 2002 - either directional increases/decreases shown or levels that are unchanged.

Ethnic Diversity in 2003

Americans who participated in human powered activities during 2003 are primarily Caucasian. Several year 2003 dynamics point to signs of growing ethnic diversity among the Participant and Enthusiast populations.

- Comparatively, the Participant population of Americans 16 and 24 includes strong representation of Hispanics and African-Americans.
- Several activities benefited from the participation behavior of non-Caucasians in 2003:
 - Backpacking
 - Single track bicycling
 - Natural rock climbing
 - Artificial wall climbing
 - Snow shoeing
 - Telemark skiing
 - Trail running

One-Timers

Many Americans 16 and older participated in specific human powered activities only one time during 2003. The reasons for such casual participation are varied, but can include an experience that did not meet expectations, a change in lifestage (birth of a child, marriage, loss of a job), unfavorable weather, a breakdown in peer participant group, lack of accessibility to participation areas, or a lack of equipment ownership. Whatever the reason, the key for organizations within the outdoor industry is to facilitate the desire and ability of Americans 16 and older to participate more frequently.

- Activities with the highest percentage of Americans 16 and older who participated only one time include:
 - Touring/sea kayaking (42%)
 - Recreation sit-on-top kayaking (48%)
 - Whitewater kayaking (50%)
 - Artificial wall climbing (37%)
 - Rock climbing (30%)
 - Backpacking (35%)
 - Canoeing (35%)
 - Car camping (30%)
 - Snowshoeing (39%)
 - Telemark skiing (35%)
- During 2003, the activities with the lowest percentage of one-timers among the Participant base include:
 - Paved road bicycling (6%)
 - Dirt road bicycling (16%)
 - Single track bicycling (14%)
 - Fly-fishing (17%)
 - Hiking (17%)
 - Trail running (9%)

Adventure/Sports Vacations

In 2003 the popularity of adventure/outdoor activity vacations was on the rise (+14%) for the second consecutive year and a wide range of sports and activities inspired the travel.

- Nearly **55 million** Americans took a vacation in 2003 where the primary purpose was to participate in an outdoor or adventure activity.
- Three activities motivated the largest number of Americans to take to the roads and air for adventure/outdoor vacations in 2003:
 - Hiking/Backpacking (9.4 million Americans 16 and older)
 - Swimming (8.4 million)
 - Fishing (8.1 million)
- A range of other activities motivated adventure/outdoor vacations in 2003 on secondary levels:
 - Camping (5.5 million Americans 16 and older)
 - Golf (4.8 million)
 - Walking (4.8 million)
 - Downhill skiing (2.9 million)
 - Hunting (2.9 million)
 - Biking (2.2 million)
 - Canoeing (1.3 million)

Non-Participant Population

The sizeable population (more than 72 million) of Americans 16 and older who did not participate in any human powered activities during 2003 differ demographically from year 2003 Participant population.

Non-Participants are more likely to be female, older, less affluent and of non-Caucasian ethnicity.

Dimension	Non-Participants	Participants
Majority Gender	Females (60%)	Males (56%)
Median Age	50.0	35.0
Mean Household Income	\$46,000	\$59,000
Ethnicity	Caucasian (74%) African-American (14%) Hispanic (5%)	Caucasian (80%) American-American (7%) Hispanic (6%)

OUTDOOR RECREATION PARTICIPATION STUDY
ALL ACTIVITIES

ALL ACTIVITIES

Headlines

- Human powered activities were popular among Americans 16 and older in 2003 – Participant and Enthusiast populations number **145.7** and **46.8 million** respectively
- Compared to 2002, year 2003 Participant activity is unchanged and Enthusiast activity is up 12%
- In 2003, Americans of all ages participated in human powered activities – median age is 35
- Year 2003 Participants are more likely to be male than in 2002 , and in any previous year
- In 2003, overall Enthusiasts are more likely to be male than female by a wide margin
- The Non-Participant population (Americans who did not participate in any human powered activities in 2003) differs significantly from the Participant population – more likely to be female, older, more ethnically diverse, and less affluent
- Activities that experienced increases in both Participant and Enthusiast activity were paved road bicycling and car camping
- Emerging activities (climbing, snowshoeing, kayaking) lost the momentum that had resulted in dynamic growth in previous years – Participant and Enthusiast levels either down or flat
- Overall, Participants and Enthusiasts are most likely to live in the states that make up the South region of the U.S.
- On average, Participants took part in three different human powered activities in 2003; Enthusiasts participated in more than four on average – multi-participation levels down from 2002

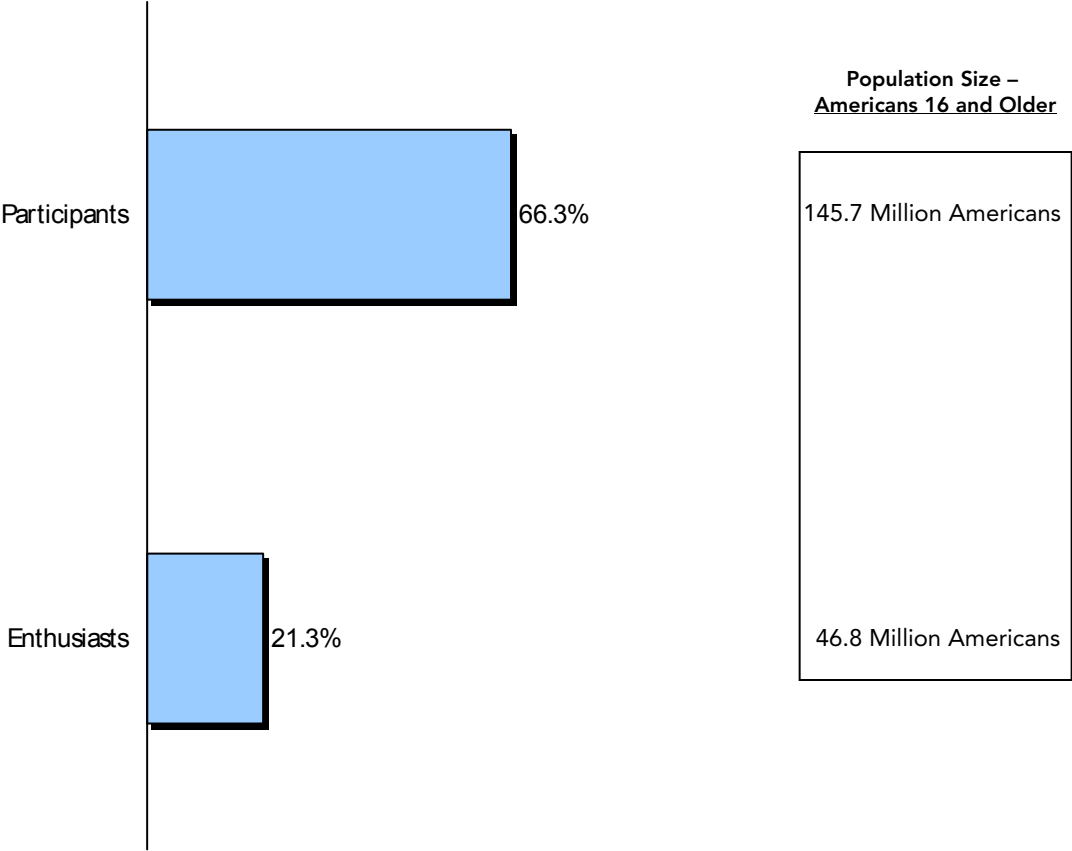
ALL ACTIVITIES PARTICIPANT & ENTHUSIAST LEVELS IN 2003

Participation in Human Powered Activities
% of U.S. Population Age 16 and Older

Human powered activities offered Americans 16 and older a popular way to spend their leisure time in 2003.

Two-thirds (66.3%) of Americans 16 and older participated in at least one human powered activity during the year – equal to a population of 145.7 million Americans 16 and older.

More than one in five (21.3%) Americans 16 and older participated in at least one human powered activity at Enthusiast levels (within the top 15% of all participation frequencies reported for the year) – yielding a population of 46.8 million Enthusiasts who devote significant levels of time, effort, and resources to human powered activities.

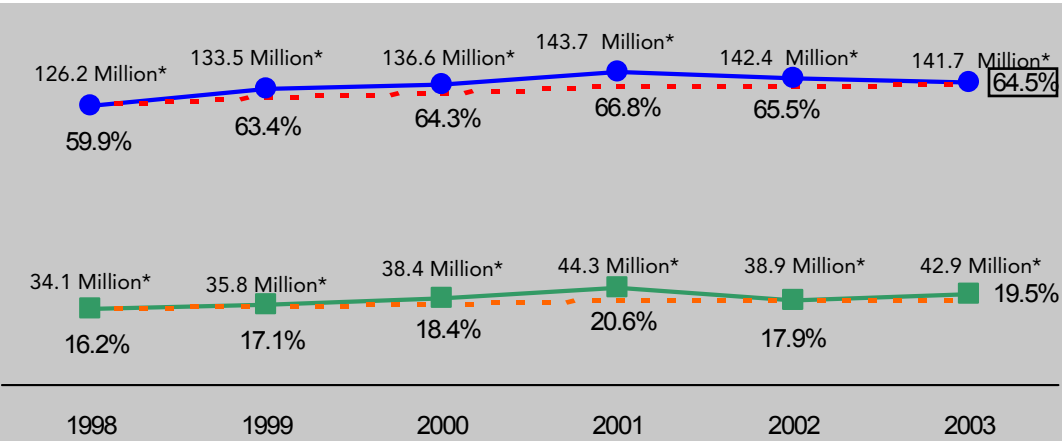


ALL ACTIVITIES PARTICIPANT & ENTHUSIAST TRENDS

***Participation in Human Powered Activities**
% of U.S. Population Age 16 and Older

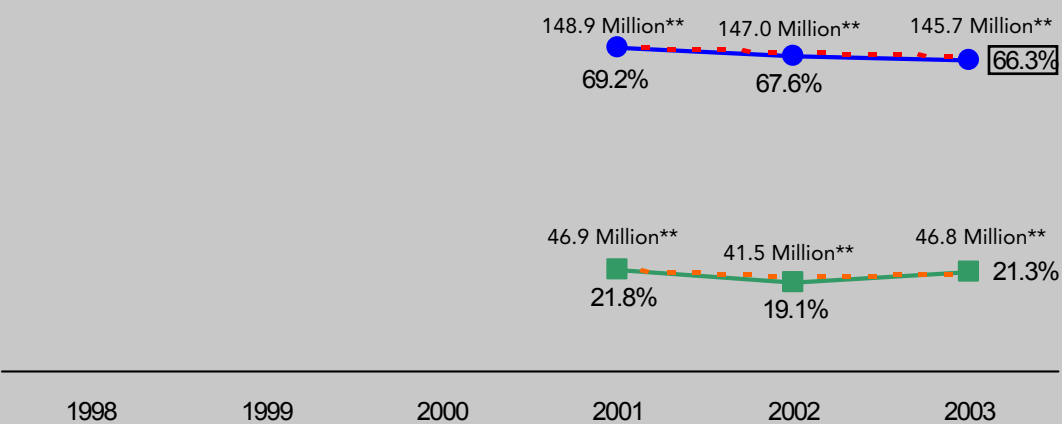
Year 2003 Participant activity in at least one of the core Outdoor Industry Association human powered activities that have been tracked since 1998, remains unchanged from 2002 levels, but is lower than in 2002. Since 1998, the incidence of participation in at least one of the core activities has climbed nearly 8%.

Enthusiast activity in at least one of the core set of activities increased in 2003 from 2002 and is higher than in 1998.



Year 2003 Participant activity in at least one of the full range of Outdoor Industry Association human powered activities remains unchanged from 2002 levels, but Participant activity is down from 2001.

Enthusiast activity in at least one of the full range of activities tracked is up in 2003 – returning to levels measured in 2001.

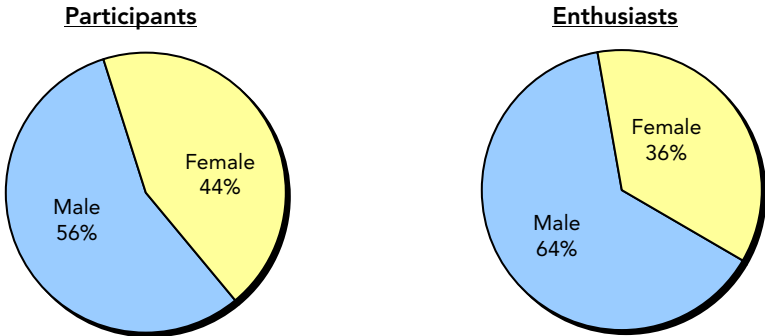


- Participants
- Enthusiasts (Within Top 15% of Frequency)
- - - Participant Rolling Trend
- - - Enthusiast Rolling Trend (Within Top 15% of Frequency)

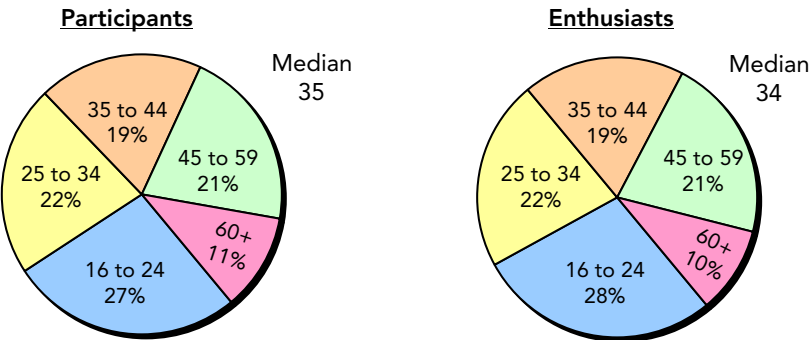
* Includes ONLY activities tracked since 1998.
** Includes ALL activities.

ALL ACTIVITIES DEMOGRAPHIC PROFILE

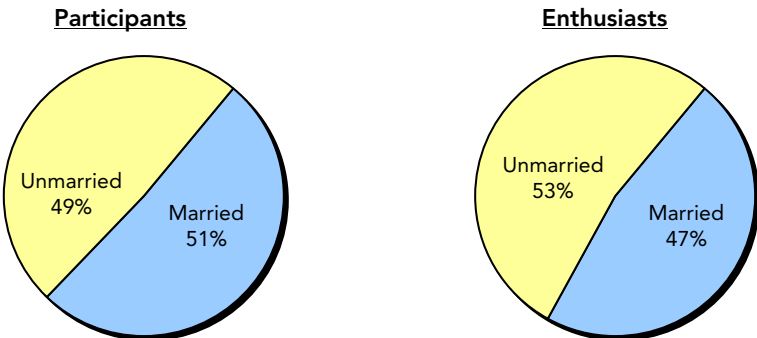
GENDER



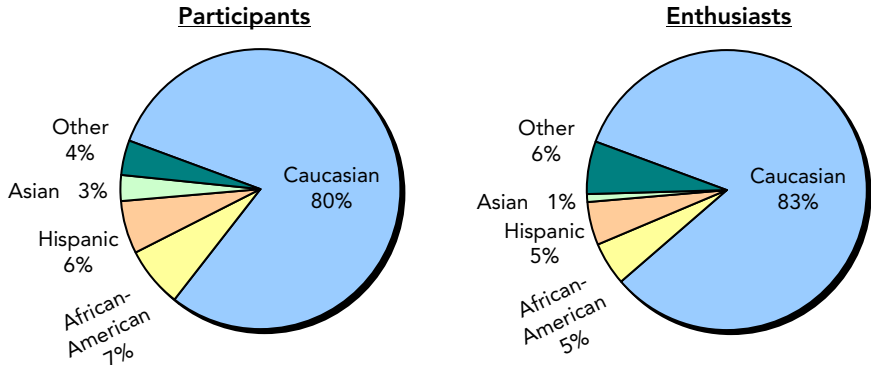
AGE



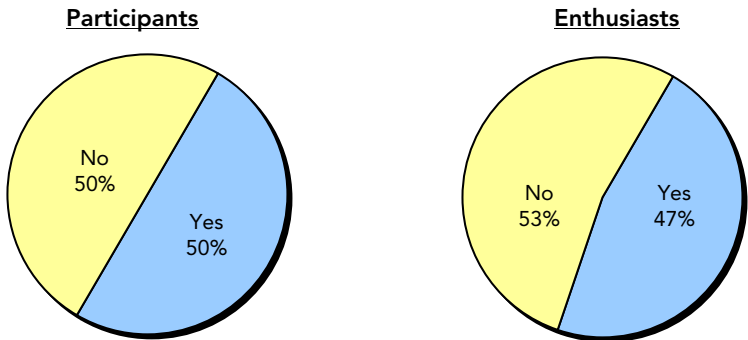
MARITAL STATUS



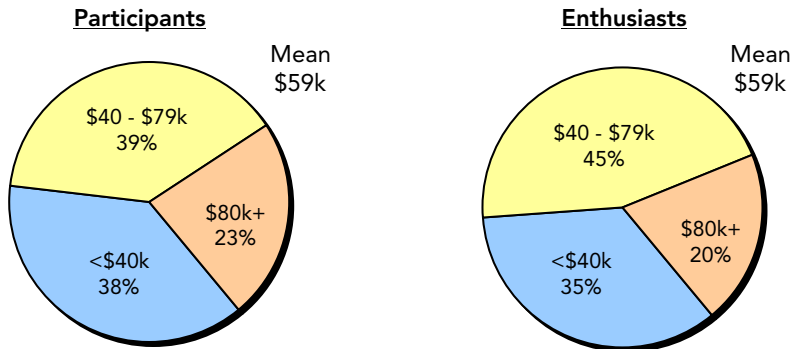
ETHNICITY



PRESENCE OF CHILDREN <18 in HOUSEHOLD



HOUSEHOLD INCOME

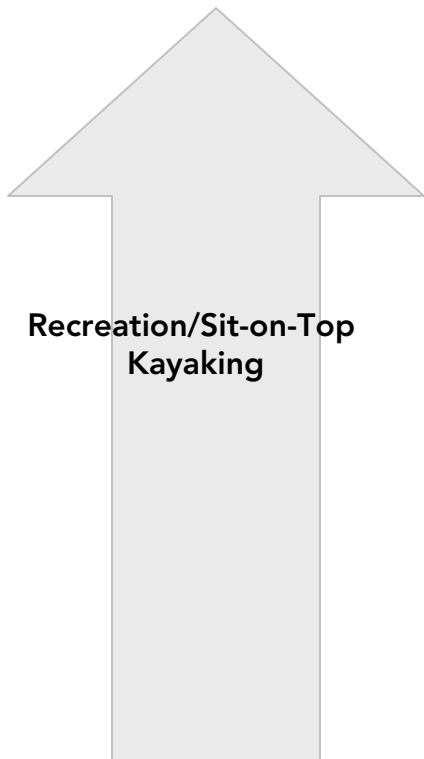


ALL ACTIVITIES PARTICIPANT LEVELS

			LONG TERM PERSPECTIVE	SHORT TERM PERSPECTIVE
Activity	Incidence of Participation Among Americans 16 and Older in 2003	Participant Population (Millions)	% Change in Incidence of Participant Activity 2003 Compared to 1998	% Change in Incidence of Participant Activity 2003 Compared to 2001
Human Powered Activities - All Types	66.3%	145.7	NA	-4.2%
Backpacking	6.2%	13.6	-20.5%	-15.1%
Bicycling - All Types	39.6%	87.0	NA	-7.9%
Bicycling - Paved Road	35.4%	77.8	-6.3%	-1.9%
Bicycling - Single Track	17.9%	39.3	+1.7%	-16.4%
Bicycling - Wide Dirt Road	17.8%	39.1	-5.8%	-12.3%
Bird Watching	7.3%	16.0	NA	-14.1%
Camping - All Types	31.3%	68.8	NA	+1.0%
Car Camping	24.1%	53.0	-10.1%	+4.8%
Camping (Away from Car)	7.5%	16.5	+2.7%	-8.5%
Climbing with Rope/Harness - All Types	3.9%	8.6	NA	-4.9%
Climbing - Natural Rock	2.1%	4.6	-12.5%	-25.0%
Climbing - Artificial Wall	2.9%	6.4	NA	+3.6%
Climbing - Ice	0.3%	0.659	NA	-40.0%
Cross-Country/Nordic Skiing	4.3%	9.5	+2.4%	-25.9%
Fly-Fishing	5.8%	12.8	NA	-6.5%
Hiking	32.7%	71.6	-4.7%	-7.4%
Paddlesports - All Types	14.7%	32.3	NA	-10.4%
Canoeing	10.2%	22.4	+18.6%	-8.9%
Rafting	4.7%	10.3	+2.2%	-19.0%
Kayaking - All Types	4.5%	9.9	+125.0%	+9.8%
Kayaking - Recreation/St-on-Top	3.0%	6.6	NA	+30.4%
Kayaking - Touring/Sea	2.6%	5.7	NA	-13.3%
Kayaking - Whitewater	0.8%	1.8	NA	-33.3%
Snowshoeing	2.7%	5.9	+92.9%	+8.0%
Telemark Skiing	1.9%	4.2	+216.7%	+5.6%
Trail Running	17.1%	37.6	+15.5%	-8.6%

PARTICIPANT TRENDS – 2003 COMPARED TO 2001*

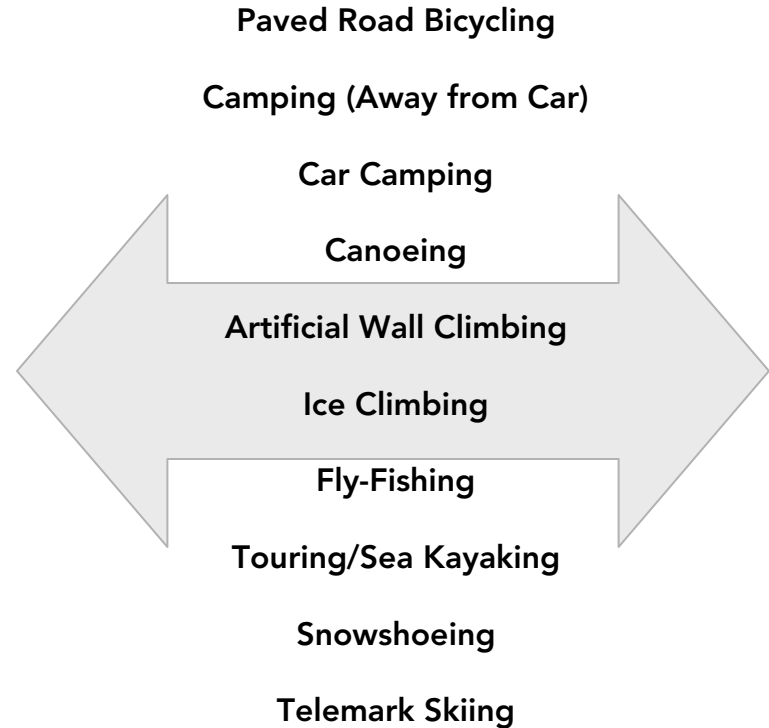
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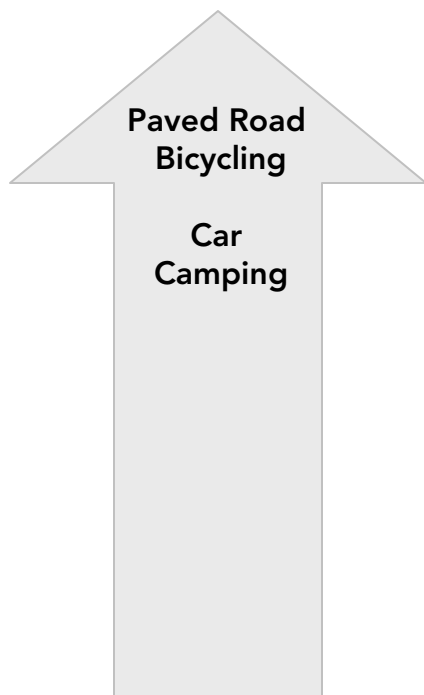
FLAT*



* Conclusions based on significant differences between Participant incidence in 2003 compared to 2001.

PARTICIPANT TRENDS – 2003 COMPARED TO 2002*

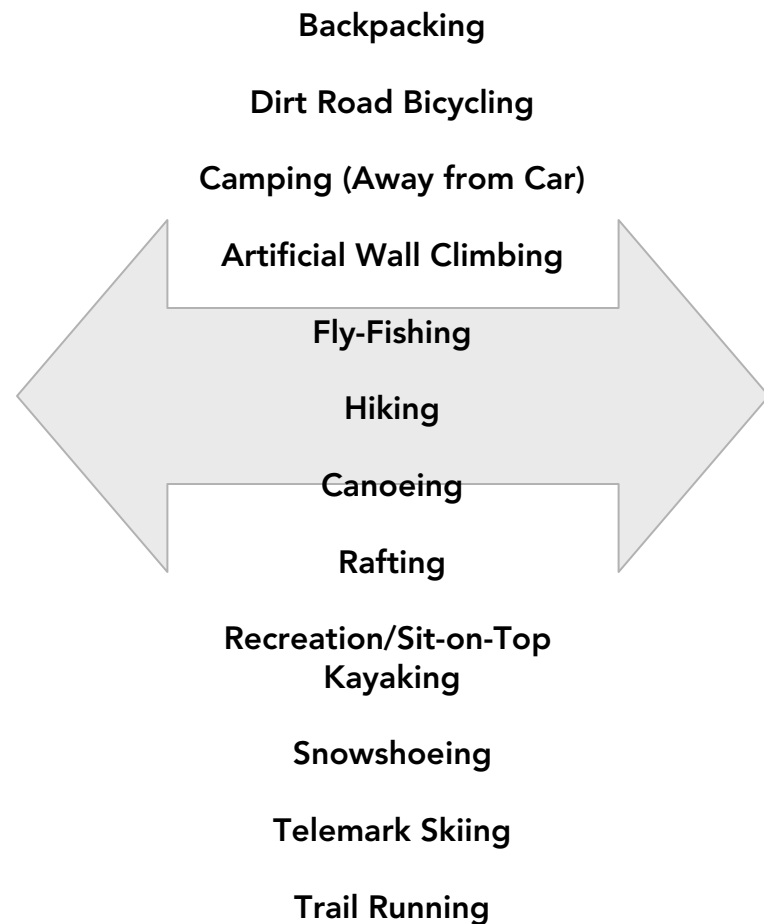
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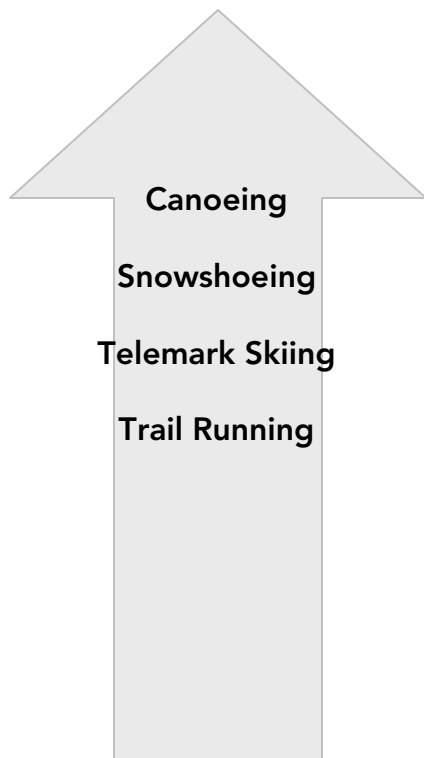
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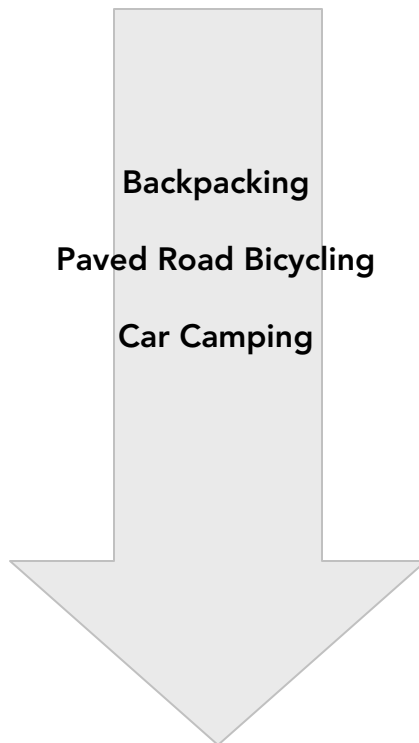
* Conclusions based on significant differences between Participant incidence in 2003 compared to 2002.

PARTICIPANT TRENDS – 2003 COMPARED TO 1998*

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FLAT*



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

* Conclusions based on significant differences between Participant incidence in 2003 compared to 1998.

ALL ACTIVITIES DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

The population of year 2003 Participants is relatively balanced along gender lines – 56% of Participants are male and 44% are female. Year 2003 Participants are more likely to be male than in 2001, or in any year.

- Americans of all ages participated in outdoor activities in 2003. One-half of Participants are between the ages of 16 and 34 (49%)
The median age of overall Participants in 2003 is 35.
- The overall Participant population in 2003 is comprised primarily of Caucasian Americans.
- One-half (50%) of year 2003 Participants report the presence of children 18 and younger in their households; a finding that reflects favorably on both the strong levels of participation among America's youth and the family-friendly nature of human powered activities.

<u>Dimension</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>
<u>Gender</u>						
Male	50%	51%	52%	53%	53%	56%
Female	50%	49%	48%	47%	47%	44%
<u>Age</u>						
16 to 24	25%	23%	26%	27%	28%	27%
25 to 34	20%	21%	21%	22%	21%	22%
35 to 44	24%	25%	22%	20%	19%	19%
45+	33%	34%	31%	31%	32%	32%
<u>Marital Status</u>						
Married	52%	54%	50%	46%	50%	51%
Unmarried	48%	46%	50%	54%	50%	49%
<u>Ethnicity</u>						
Caucasian	84%	84%	81%	79%	81%	80%
African-American	7%	7%	8%	10%	8%	7%
Hispanic	5%	6%	6%	6%	6%	6%
Asian	*	1%	2%	1%	2%	3%
<u>Children <18</u>						
Yes	46%	47%	48%	43%	45%	50%
<u>Household Income</u>						
<\$40k	NA	37%	38%	42%	38%	38%
\$40k - \$79k	NA	41%	43%	42%	40%	39%
\$80k+	NA	22%	19%	16%	22%	23%
<u>Region</u>						
Northeast	17%	20%	18%	19%	19%	18%
South Central	29%	31%	30%	32%	33%	33%
North Central	26%	25%	22%	24%	25%	24%
West	28%	24%	30%	25%	24%	25%

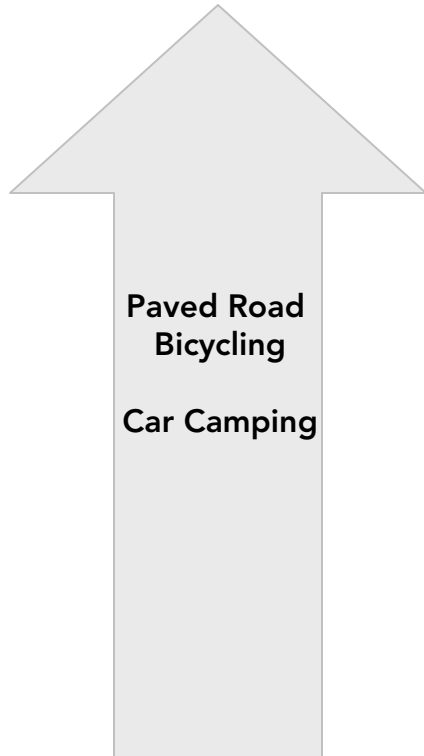
 = Significant difference from 2001

ALL ACTIVITIES ENTHUSIAST LEVELS

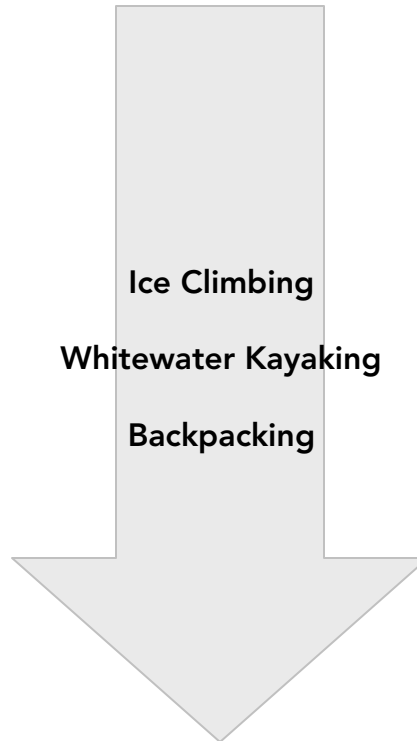
				LONG TERM PERSPECTIVE	SHORT TERM PERSPECTIVE
<u>Activity</u>	<u>Incidence of Enthusiasts Among Americans 16 and Older in 2003</u>	<u>Enthusiast Population (Millions)</u>	<u>Enthusiast Frequency Level (2003)</u>	<u>% Change in Incidence of Enthusiast Activity 2003 Compared to 1998</u>	<u>% Change in Incidence of Enthusiast Activity 2003 Compared to 2001</u>
Human Powered Activities - All Types	21.3%	46.8	NA	-2.3%	-2.3%
Backpacking	0.8%	1.8	6+	-20.0%	-33.3%
Bicycling - All Types	9.3%	20.4	30+	NA	+8.1%
Bicycling - Paved Road	6.8%	14.9	49+	+28.3%	+13.6%
Bicycling - Single Track	3.0%	6.6	20+	+150.0%	-14.3%
Bicycling - Wide Dirt Road	3.0%	6.6	20+	+87.5%	-6.3%
Bird Watching	1.2%	2.6	20+	NA	-14.3%
Camping - All Types	4.9%	10.8	7+	NA	-10.9%
Car Camping	3.9%	8.6	7+	No Change	-2.5%
Camping (Away from Car)	1.1%	2.4	7+	-8.3%	-45.0%
Climbing with Rope/Harness - All Types	0.7%	1.5	7+	NA	-22.2%
Climbing - Natural Rock	0.3%	0.659	11+	-40.0%	-50.0%
Climbing - Artificial Wall	0.5%	1.1	9+	NA	No Change
Climbing - Ice	0.05%	0.110	2+	NA	-50.0%
Cross-Country/Nordic Skiing	0.7%	1.5	8+	-22.2%	-36.4%
Fly-Fishing	0.9%	2.0	15+	+16.7%	-10.0%
Hiking	4.8%	10.5	14+	+14.3%	-15.8%
Paddlesports - All Types	2.7%	2.9	5+	NA	-22.9%
Canoeing	1.6%	3.5	6+	+14.3%	-23.8%
Rafting	0.9%	2.0	3+	+80.0%	-10.0%
Kayaking - All Types	0.7%	1.5	5+	+25.0.0%	-30.0%
Kayaking - Recreation/St-on-Top	0.3%	0.659	7+	NA	-50.0%
Kayaking - Touring/Sea	0.5%	1.1	6+	NA	No Change
Kayaking - Whitewater	0.1%	0.220	3+	NA	-50.0%
Snowshoeing	0.5%	1.1	6+	+400.0%	No Change
Telemark Skiing	0.3%	0.659	6+	+200.0%	No Change
Trail Running	2.6%	5.7	49+	+36.8%	-16.1%

ENTHUSIAST TRENDS – 2003 COMPARED TO 2002*

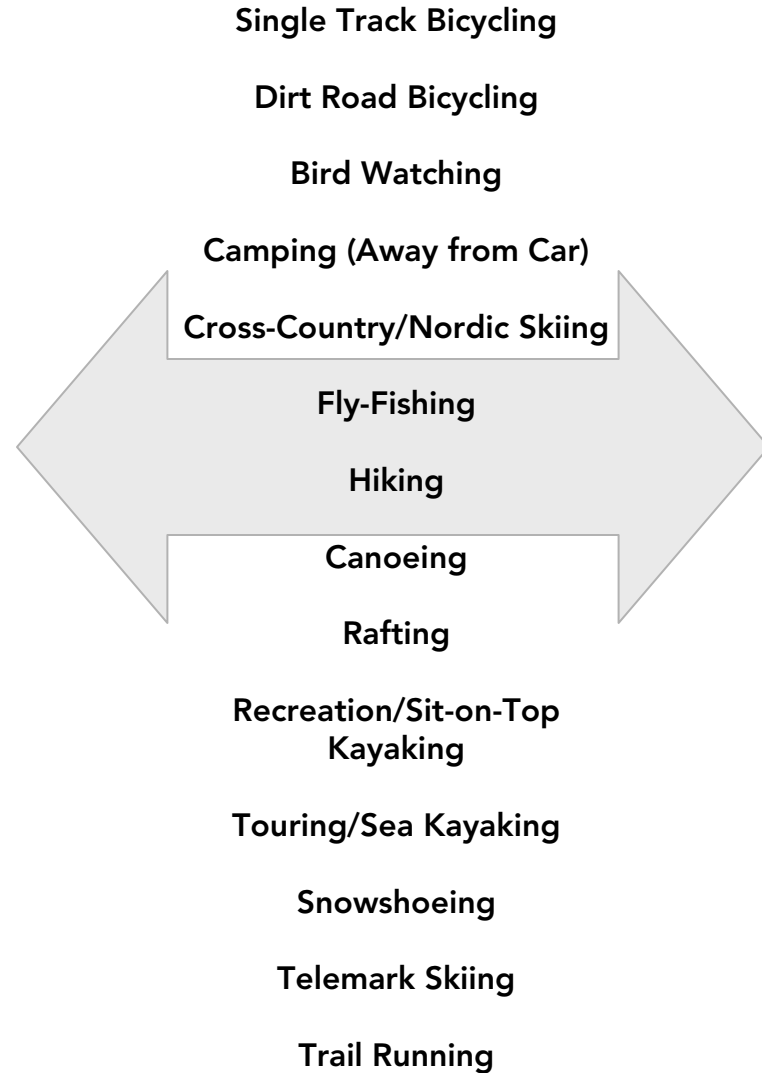
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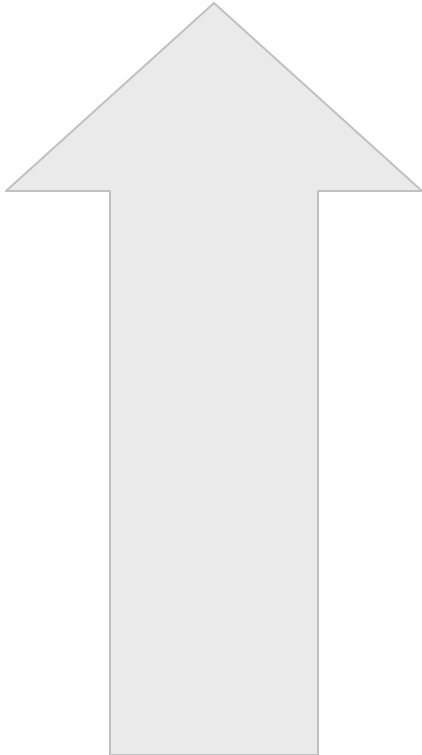
FLAT*



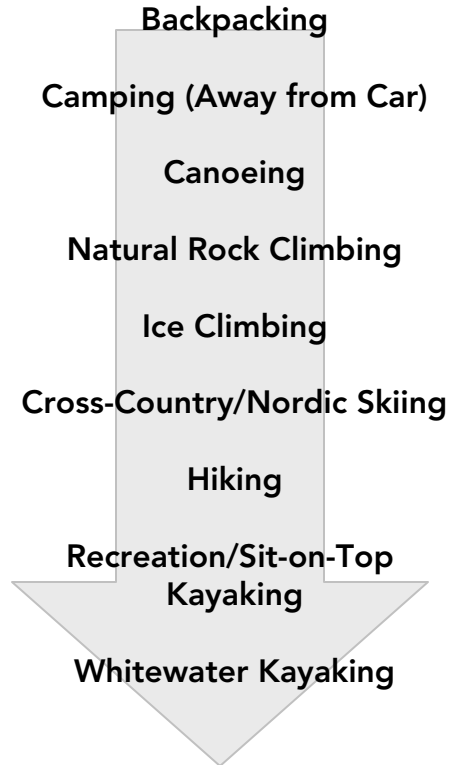
* Conclusions based on significant differences between Participant incidence in 2003 compared to 2002.

ENTHUSIAST TRENDS – 2003 COMPARED TO 2001*

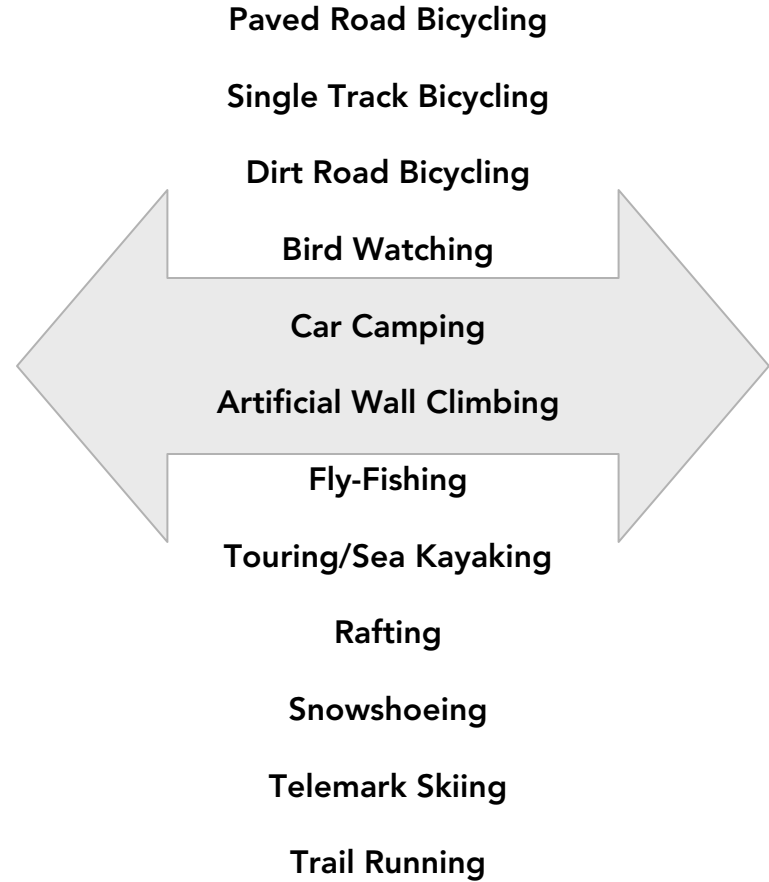
GREW*



DECLINED*



FLAT*



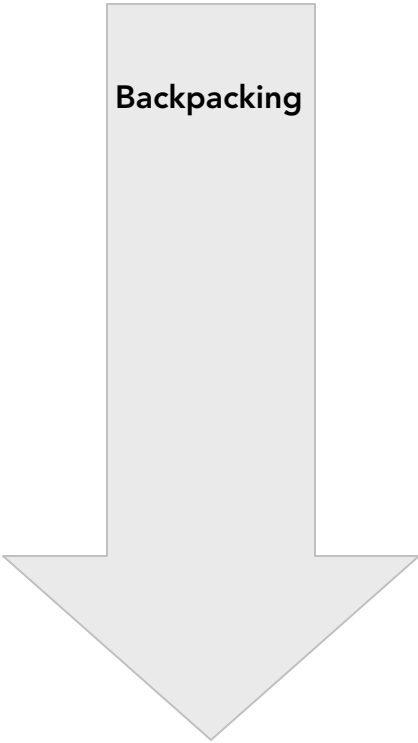
* Conclusions based on significant differences between Participant incidence in 2003 compared to 2001.

ENTHUSIAST TRENDS – 2003 COMPARED TO 1998*

GREW*



DECLINED*



FLAT*



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

* Conclusions based on significant differences between Participant incidence in 2003 compared to 1998.

ALL ACTIVITIES DEMOGRAPHIC PROFILE TRENDS OF ENTHUSIASTS

- Year 2003 Americans who participated in at least one human powered activity at Enthusiast levels are more likely to be male (64%) than female (36%), confirming a growing a gender imbalance first identified in 2002.
- The age profile of Enthusiasts has been relatively consistent throughout the past six years. All groups are strongly represented within the overall year 2003 Enthusiast population – reflecting the broadbased enthusiasm that Americans have for human powered outdoor activities. The median age of overall Enthusiasts has become younger in the past year – 39.5 in 2002 and 34 in 2003; indicating that year 2003 Enthusiast activity is driven by the committed participation of younger Americans.
- Nearly one-half (47%) of year 2003 Enthusiasts report the presence of children 18 and younger in the household , higher than in 2001.
- Year 2003 Enthusiasts are more likely than their 2001 counterparts to live in the South Central region and less likely to live in the West

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	56%	60%	55%	56%	63%	64%
Female	44%	50%	45%	44%	37%	36%
Age						
16 to 24	28%	24%	30%	29%	28%	28%
25 to 34	21%	21%	17%	22%	21%	22%
35 to 44	17%	23%	22%	21%	20%	19%
45+	31%	32%	31%	28%	31%	31%
Marital Status						
Married	48%	49%	45%	43%	48%	47%
Unmarried	52%	51%	55%	57%	52%	53%
Ethnicity						
Caucasian	87%	86%	83%	85%	84%	83%
African-American	6%	5%	5%	5%	6%	5%
Hispanic	4%	5%	6%	5%	5%	5%
Asian	1%	1%	*	1%	1%	1%
Children <18						
Yes	43%	44%	50%	40%	42%	47%
Household Income						
<\$40k	NA	34%	38%	38%	36%	35%
\$40k - \$79k	NA	43%	46%	44%	40%	45%
\$80k+	NA	23%	16%	18%	24%	20%
Region						
Northeast	21%	20%	22%	21%	19%	19%
South Central	31%	28%	31%	29%	33%	33%
North Central	24%	22%	20%	21%	25%	24%
West	24%	30%	27%	29%	24%	24%

 = Significant difference from 2001

ALL ACTIVITIES - MULTI-PARTICIPATING AMONG PARTICIPANTS

During 2003, the majority (63.9%) of overall Participants took part in between one and three separate human powered activities.

- On average Participants 16 and older participated in slightly more than three different activities in 2003
- 16 to 24 year old Participants were involved in nearly four activities on average
- Female Participants were active in nearly three activities on average during the year.

Number of Human Powered Activities Participated In During 2003 (Among Participants)	16 and Older Participants	16 to 24 Year Old Participants	Female 16 and Older Participants
1 activity only	27.0%	18.5%	31.6%
2	21.0%	19.5%	21.7%
3	15.9%	15.8%	16.0%
4	13.0%	15.5%	13.0%
5	8.4%	8.9%	7.2%
6	6.0%	8.9%	5.1%
7	3.9%	4.9%	2.5%
8	2.1%	3.3%	1.4%
9	1.1%	1.8%	0.6%
10	0.9%	1.3%	0.3%
11	0.6%	0.7%	0.3%
12	0.1%	0.4%	0.2%
13	0.0%	0.2%	0.1%
14	0.0%	0.0%	0.0%
15	0.0%	0.3%	0.0%
16	0.0%	0.0%	0.0%
17	0.0%	0.0%	0.0%
18	0.0%	0.0%	0.0%
19	0.0%	0.0%	0.0%
20	0.0%	0.0%	0.0%
21 activities	0.0%	0.0%	0.0%
Mean # of Activities Participated In During 2003 (Among Participants)	3.2	3.8	2.9

ALL ACTIVITIES - MULTI-PARTICIPATING AMONG ENTHUSIASTS

During 2003, most Enthusiasts participated in multiple human powered activities with only a modest percentage of Enthusiasts involved in only one activity.

- During 2003, Enthusiasts 16 and older participated in more than four different activities.
- Enthusiasts between the ages of 16 and 24 have a particularly wide set of activities in which they participated during 2003
- On average, female Enthusiasts were involved with four separate activities during 2003.

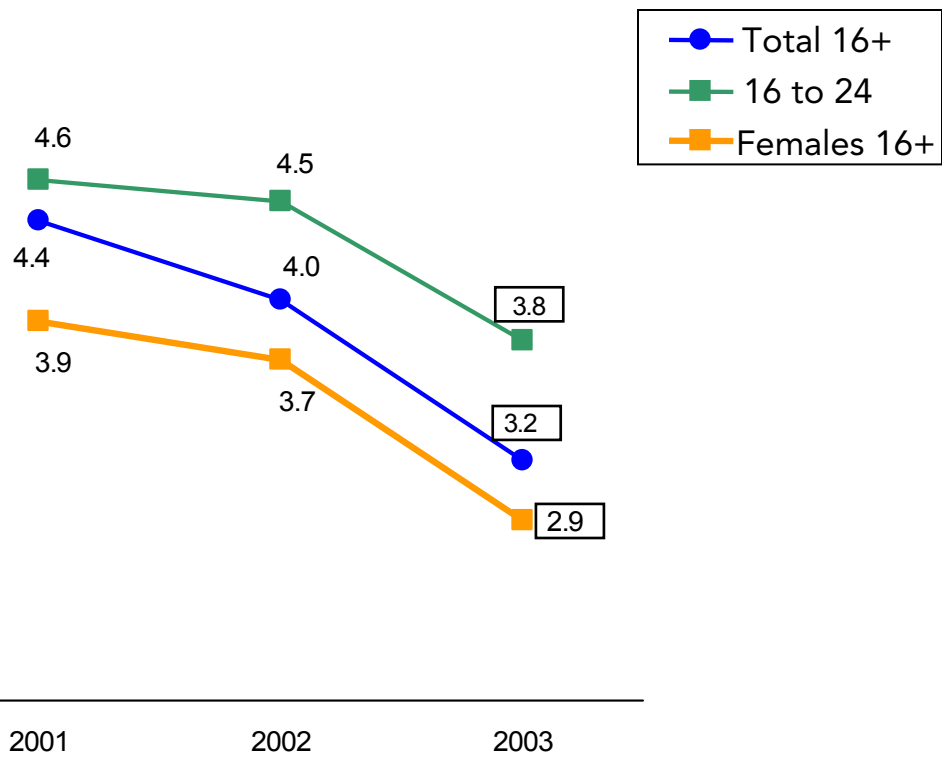
Number of Human Powered Activities Participated In During 2003 (Among Enthusiasts)	16 and Older Enthusiasts	16 to 24 Year Old Enthusiasts	Female 16 and Older Participants
1 activity only	12.2%	8.2%	14.9%
2	15.0%	12.0%	17.9%
3	15.8%	13.0%	18.4%
4	15.8%	16.8%	15.5%
5	11.6%	10.9%	11.0%
6	10.1%	12.0%	7.7%
7	7.9%	10.3%	5.0%
8	4.2%	5.4%	3.1%
9	2.8%	4.3%	2.4%
10	2.0%	3.3%	1.4%
11	1.5%	1.6%	1.8%
12	0.6%	1.1%	0.8%
13	0.1%	0.0%	0.0%
14	0.1%	0.0%	0.0%
15	0.1%	1.1%	0.0%
16	0.2%	0.0%	0.0%
17	0.0%	0.0%	0.0%
18	0.0%	0.0%	0.0%
19	0.0%	0.0%	0.0%
20	0.0%	0.0%	0.0%
21 activities	0.0%	0.0%	0.0%
Mean # of Activities Participated In During 2003 (Among Enthusiasts)	4.4	5.0	4.0

ALL ACTIVITIES - MULTI-PARTICIPATING TRENDS AMONG PARTICIPANTS*

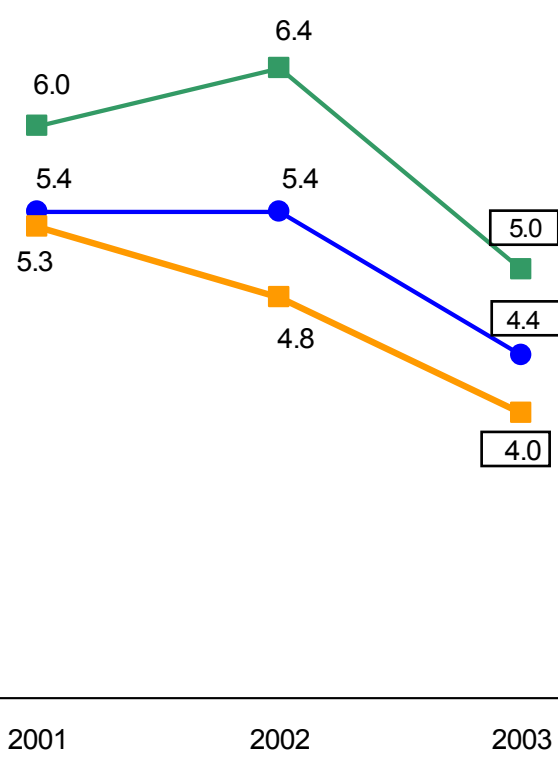
Year 2003 was not a year for participation experimentation. The practice of participating in a wide range of human powered activities declined in 2003 compared to the previous year – as Participants and Enthusiasts focused their time and efforts on a core set of familiar activities.

Participant/Enthusiast Americans 16 and older, Participants/Enthusiasts 16 to 24 years old and female Participants/Enthusiasts all engaged in a fewer number of activities on average in 2003 than in the previous two years.

Mean Number of Different Activities Participated In –
Among Participant Populations

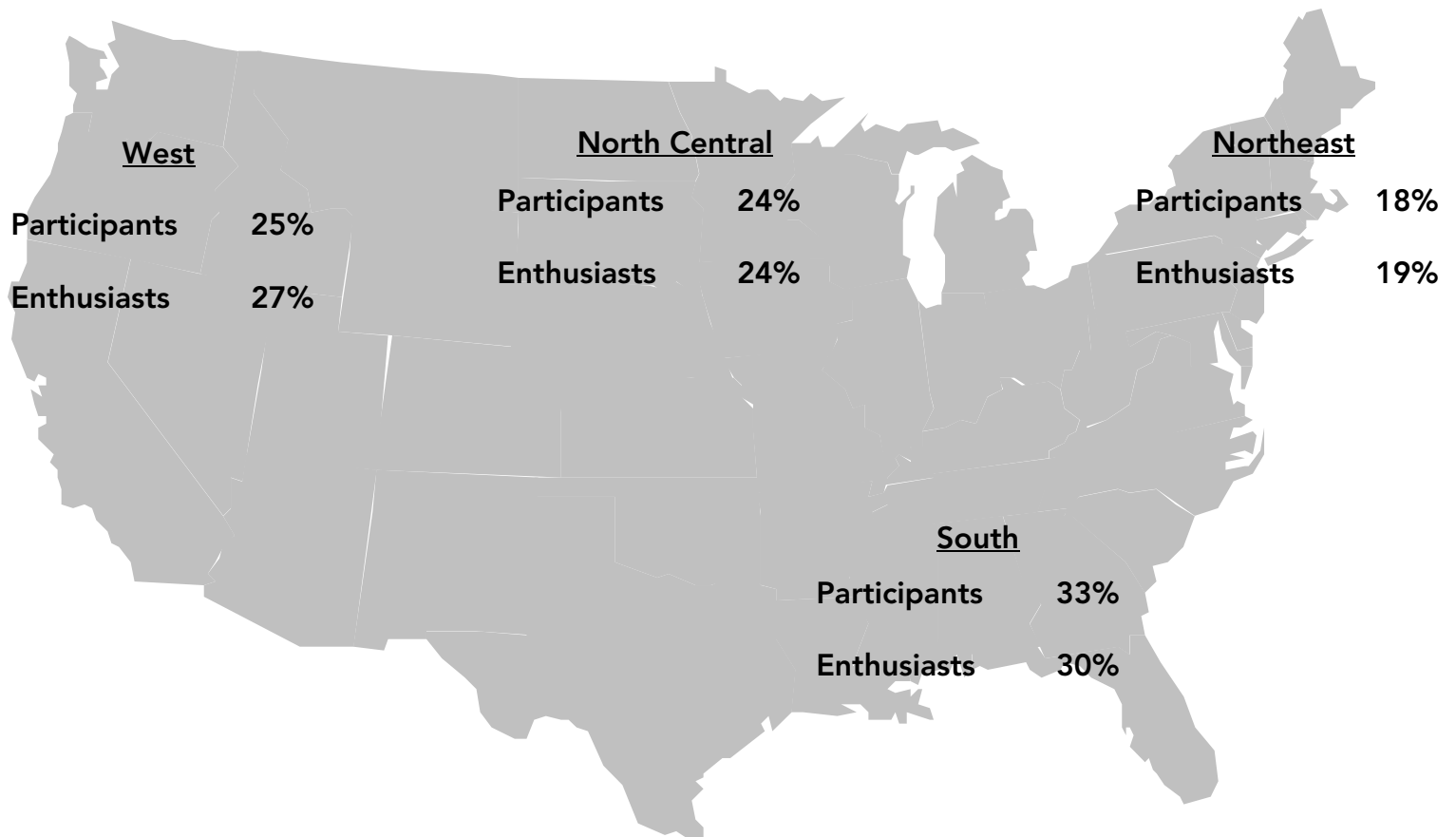


Mean Number of Different Activities Participated In –
Among Enthusiast Populations



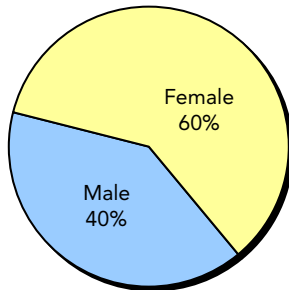
ALL ACTIVITIES REGIONAL PROFILE YEAR 2003

In 2003, Participants and Enthusiasts in human powered activities are most likely to live in the South, followed by the West, and North Central regions.

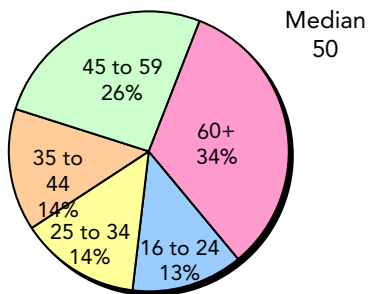


NON-PARTICIPANTS (NO ACTIVITIES) DEMOGRAPHIC PROFILE

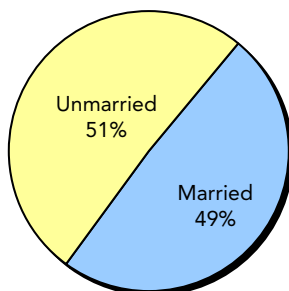
GENDER
Non-Participants



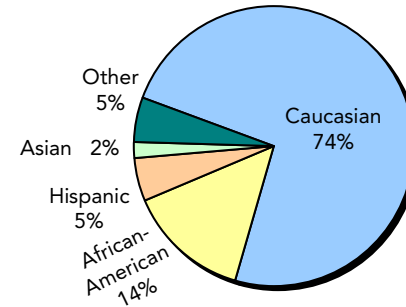
AGE
Non-Participants



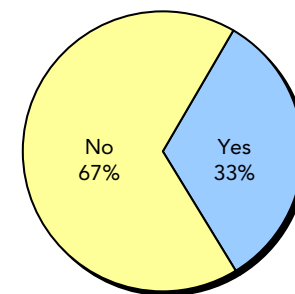
MARITAL STATUS
Non-Participants



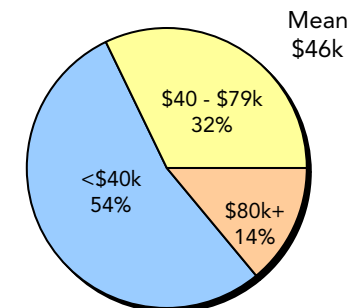
ETHNICITY
Non-Participants



PRESENCE OF CHILDREN <18 in HOUSEHOLD
Non-Participants



HOUSEHOLD INCOME
Non-Participants



NON-PARTICIPANTS (NO ACTIVITIES) DEMOGRAPHIC PROFILE

- The key dimensions that define the year 2003 Non-Participant population remain unchanged from 2002.
- As a group, Non-Participants tend to be female (60%), 45 years of age or older (60%), ethnically diverse, and of moderate affluence (mean household income of \$46,000).

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	NA	NA	NA	NA	42%	40%
Female	NA	NA	NA	NA	58%	60%
Age						
16 to 24	NA	NA	NA	NA	13%	13%
25 to 34	NA	NA	NA	NA	13%	13%
35 to 44	NA	NA	NA	NA	15%	14%
45+	NA	NA	NA	NA	59%	60%
Marital Status						
Married	NA	NA	NA	NA	52%	49%
Unmarried	NA	NA	NA	NA	48%	51%
Ethnicity						
Caucasian	NA	NA	NA	NA	76%	74%
African-American	NA	NA	NA	NA	13%	14%
Hispanic	NA	NA	NA	NA	6%	5%
Asian	NA	NA	NA	NA	2%	2%
Children <18						
Yes	NA	NA	NA	NA	31%	33%
Household Income						
<\$40k	NA	NA	NA	NA	58%	54%
\$40k - \$79k	NA	NA	NA	NA	30%	32%
\$80k+	NA	NA	NA	NA	12%	14%
Region						
Northeast	NA	NA	NA	NA	20%	20%
South Central	NA	NA	NA	NA	37%	38%
North Central	NA	NA	NA	NA	24%	22%
West	NA	NA	NA	NA	19%	21%

OUTDOOR RECREATION PARTICIPATION STUDY
YOUNG AMERICANS 16-24 YEARS OLD

YOUNG AMERICANS 16-24 YEARS OLD

Headlines

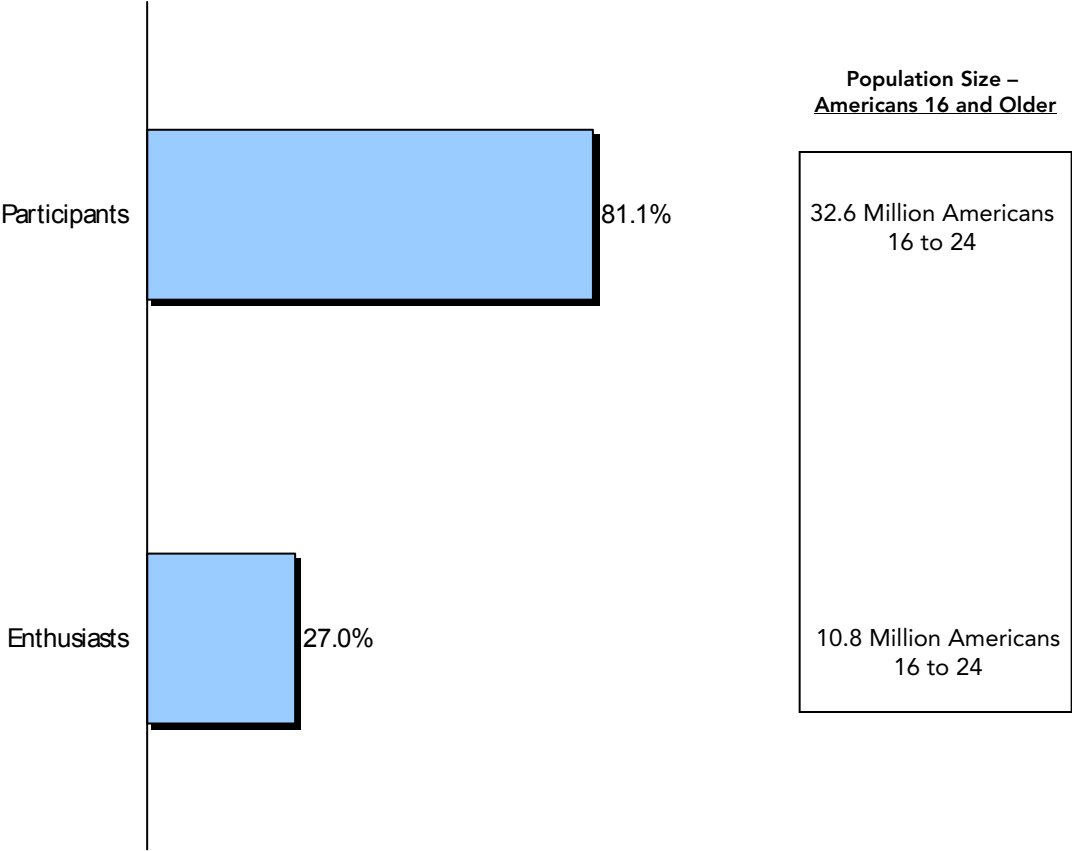
- During 2003, human powered activities benefited from the strong participation of young Americans, numbering **32.6 million** Participants and **10.8 million** Enthusiasts.
- Compared to 2002, Participant activity in 2003 is flat, but the incidence of Enthusiast activity increased sharply (up 17%)
- In 2003, only two activities experienced a growth in Participant activity among Americans 16 -24: car camping, Telemark skiing
- Participant activity in a limited set of activities is down in 2003 – ice climbing, natural rock climbing, cross-country/Nordic skiing, touring/sea and whitewater kayaking
- Compared to the previous year, Enthusiast activity levels in 2003 reveal a mix of short-term trends – camping (particularly car camping), Telemark skiing, artificial wall climbing, canoeing and rafting are up; kayaking (particularly touring/sea and whitewater), cross/country/Nordic skiing, snowshoeing and backpacking are down; all other activities remain unchanged
- Demographically, year 2003 Participant and Enthusiast populations reveal two key trends - continued male majority representation and strong ethnic diversity
- Young Participants and Enthusiasts are most likely to reside in the South, followed by the West and North Central regions

16 – 24 YEAR OLD PARTICIPANTS AND ENTHUSIASTS - ALL ACTIVITIES

Participation in Human Powered Activities
% of U.S. Population Age 16 to 24

More than eight in 10 (81.8%) Americans 16 to 24 report participation in at least one of the human powered activities in 2003: a population of 32.6 million young Americans.

More than one-quarter (27.0%) of 16 to 24 year old Americans are classified as an Enthusiast in at least one human powered activity during 2003. Creating a population of nearly 11 million committed Enthusiasts.



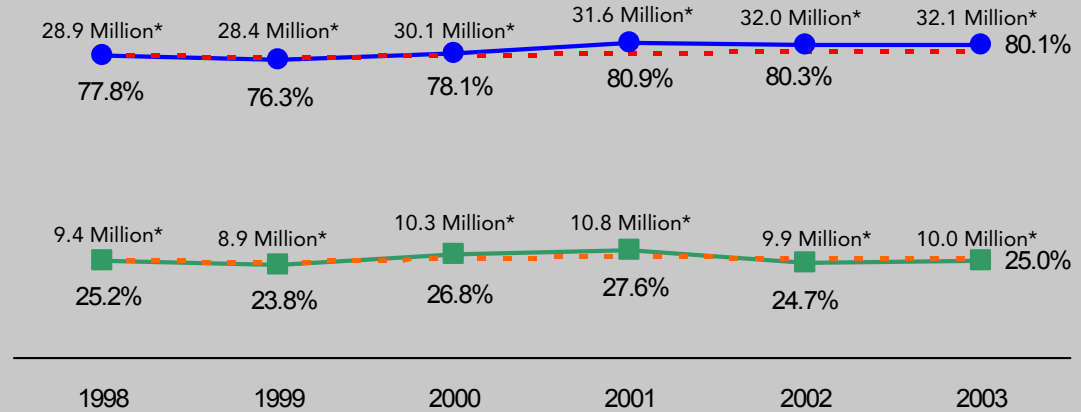
16 – 24 YEAR OLD PARTICIPANT AND ENTHUSIAST TRENDS- ALL ACTIVITIES

In 2003, a total of 32.1 million Americans between the ages of 16 and 24 participated in at least one of the core Outdoor Industry Association human powered activities tracked since 1998 – a level unchanged from 2002 and 2001.

Participant behavior among young Americans is higher than the level measured six years ago in 1998.

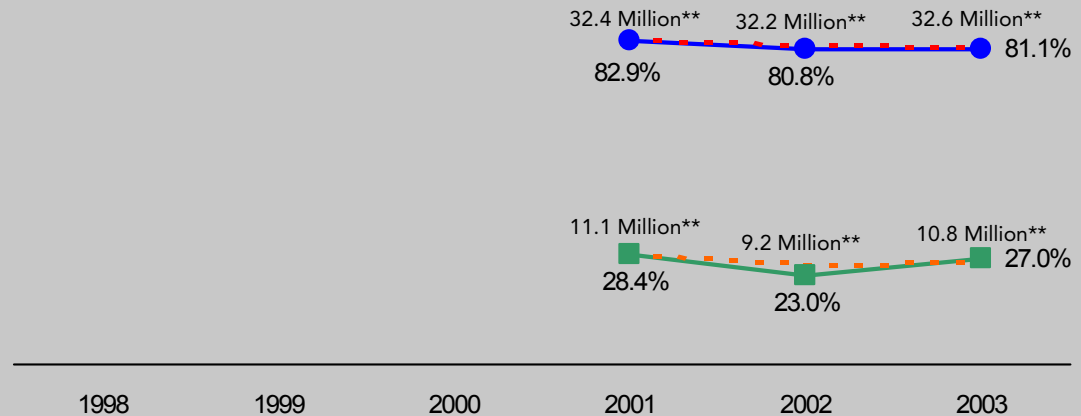
2003 Participation commitment in one of the core human powered activities among 16 to 24 year old Americans is unchanged when compared to 2002, 2001 and 1998.

***Participation in Human Powered Activities**
% of U.S. Population Age 16 to 24



Year 2003 Participant activity among 16 to 24 year-olds in at least one of the full range of Outdoor Industry Association human powered activities remains unchanged over the past three years.

Enthusiast activity in at least one of the full range of activities tracked is up sharply in 2003 from 2002 levels and is back on par with levels measured in 2001.



- Participants
- Enthusiasts (Within Top 15% of Frequency)
- - - Participant Rolling Trend
- - - Enthusiast Rolling Trend (Within Top 15% of Frequency)

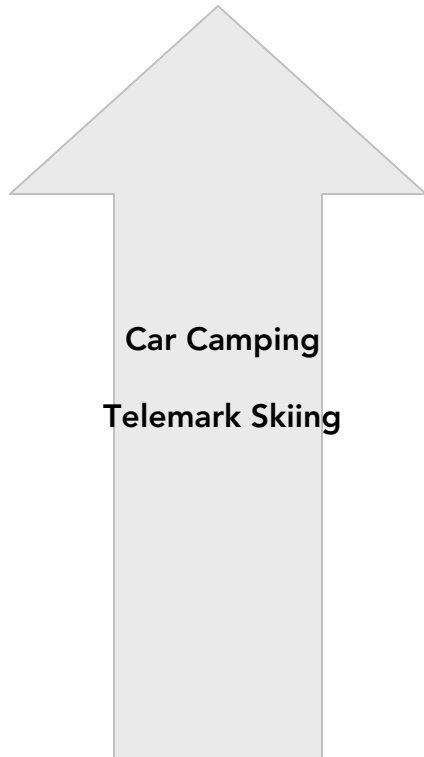
* Includes ONLY activities tracked since 1998.
** Includes ALL activities.

16-24 YEAR OLD PARTICIPANT LEVELS

			LONG TERM PERSPECTIVE	SHORT TERM PERSPECTIVE
Activity	Incidence of Participation Among Americans 16 to 24 in 2003	Participant Population (Millions)	% Change in Incidence of Participant Activity 2003 Compared to 1998	% Change in Incidence of Participant Activity 2003 Compared to 2001
Human Powered Activities - All Types	81.1%	32.6	NA	-2.2%
Backpacking	12.2%	4.9	-28.2%	-5.4%
Bicycling - All Types	51.0%	20.5	NA	-5.2%
Bicycling - Paved Road	45.1%	18.1	-13.3%	-0.2%
Bicycling - Single Track	30.8%	12.4	-21.0%	-5.2%
Bicycling - Wide Dirt Road	29.8%	12.0	-23.6%	-9.1%
Bird Watching	4.7%	1.9	NA	-16.1%
Camping - All Types	41.9%	16.8	NA	-0.9%
Car Camping	27.5%	11.0	-5.2%	-3.8%
Camping (Away from Car)	14.5%	5.8	+20.8%	+3.6%
Climbing with Rope/Harness - All Types	8.8%	3.5	NA	-5.4%
Climbing - Natural Rock	4.3%	1.7	-17.1%	-31.7%
Climbing - Artificial Wall	7.8%	3.1	NA	+9.9%
Climbing - Ice	0.7%	0.281	NA	-30.0%
Cross-Country/Nordic Skiing	4.4%	1.8	-12.0%	-36.2%
Fly-Fishing	6.9%	2.8	NA	-14.8%
Hiking	36.0%	14.5	-10.0%	-4.5%
Paddlesports - All Types	20.6%	8.3	NA	-10.8%
Canoeing	14.1%	5.7	+0.7%	-0.7%
Rafting	7.8%	3.1	-22.0%	-22.0%
Kayaking - All Types	7.2%	2.9	+260.0%	+12.5%
Kayaking - Recreation/St-on-Top	4.0%	1.6	NA	+25.0%
Kayaking - Touring/Sea	3.7%	1.5	NA	-28.8%
Kayaking - Whitewater	1.3%	0.522	NA	-27.8%
Showshoeing	3.1%	1.2	+55.0%	-11.4%
Telemark Skiing	4.1%	1.7	+310.0%	+28.1%
Trail Running	34.7%	13.9	+15.7%	-2.5%

16-24 YEAR OLD PARTICIPANT TRENDS – 2003 COMPARED TO 2002*

GREW*



DECLINED*



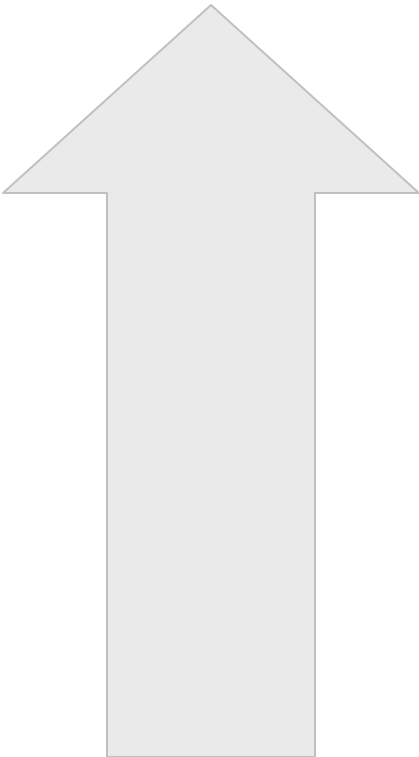
FLAT*



* Conclusions based on significant differences between Participant incidence in 2003 and 2002

16-24 YEAR OLD PARTICIPANT TRENDS – 2003 COMPARED TO 2001*

GREW*



DECLINED*



FLAT*



Backpacking

Paved Road Bicycling

Single Track Bicycling

Dirt Road Bicycling

Bird Watching

Car Camping

Camping (Away from Car)

Artificial Wall Climbing

Ice Climbing

Fly-Fishing

Hiking

Canoeing

Rafting

Recreation/Sit-on-Top Kayaking

Touring/Sea Kayaking

Whitewater Kayaking

Snowshoeing

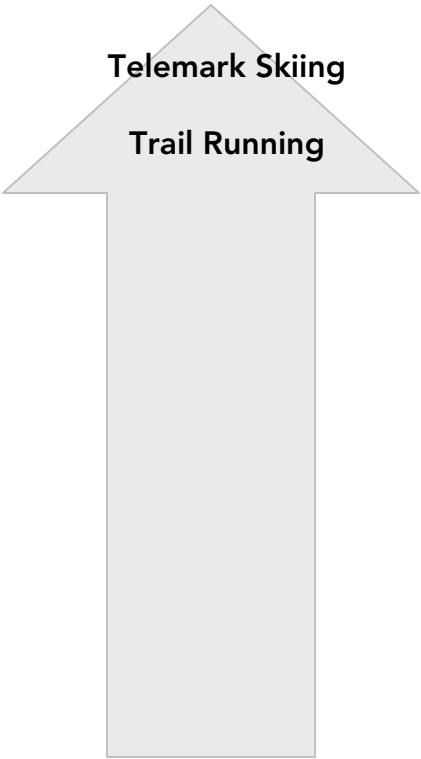
Telemark Skiing

Trail Running

* Conclusions based on significant differences between Participant incidence in 2003 compared to 2001.

16-24 YEAR OLD PARTICIPANT TRENDS – 2003 COMPARED TO 1998*

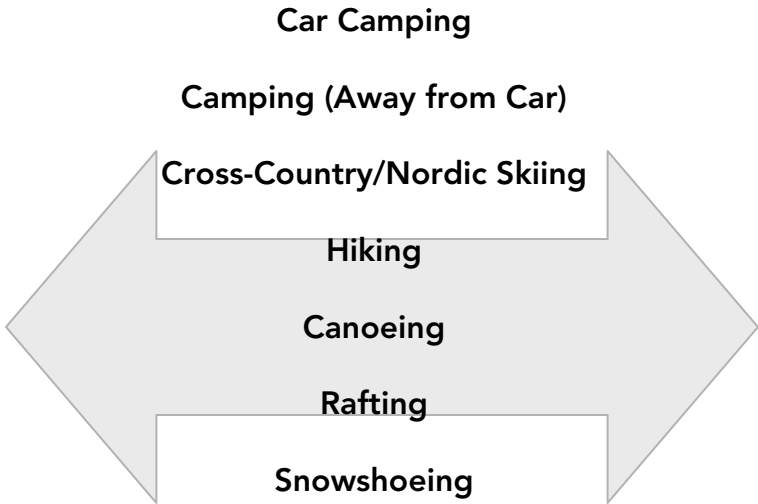
GREW*



DECLINED*



FLAT*



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

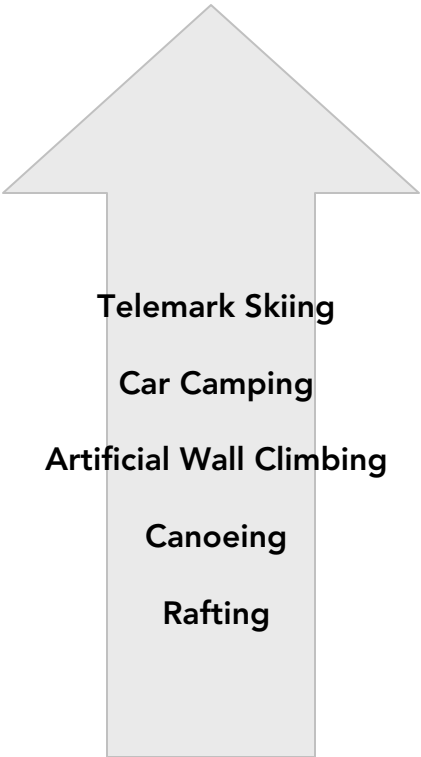
* Conclusions based on significant differences between Participant incidence in 2003 compared to 1998.

16-24 AMERICANS ENTHUSIAST LEVELS

				LONG TERM PERSPECTIVE	SHORT TERM PERSPECTIVE
<u>Activity</u>	<u>Incidence of Enthusiasts Among Americans 16 to 24 in 2003</u>	<u>Enthusiast Population (Millions)</u>	<u>Enthusiast Frequency Level (2003)</u>	<u>% Change in Incidence of Enthusiast Activity 2003 Compared to 1998</u>	<u>% Change in Incidence of Enthusiast Activity 2003 Compared to 2001</u>
Human Powered Activities - All Types	27.0%	10.8	NA	NA	-4.9%
Backpacking	1.0%	0.401	6+	-50.0%	-58.3%
Bicycling - All Types	12.8%	5.1	30+	NA	+4.9%
Bicycling - Paved Road	8.2%	3.3	49+	-31.7%	No Change
Bicycling - Single Track	5.3%	2.1	20+	+32.5%	+12.8%
Bicycling - Wide Dirt Road	4.8%	1.9	20+	+20.0%	+4.3%
Bird Watching	1.0%	0.401	20+	NA	+66.7%
Camping - All Types	6.6%	2.7	7+	NA	+3.1%
Car Camping	4.1%	1.7	7+	+105.0%	+20.6%
Camping (Away from Car)	2.5%	1.0	7+	NA	+150.0%
Climbing with Rope/Harness - All Types	1.9%	0.763	7+	NA	-20.8%
Climbing - Natural Rock	0.7%	0.281	11+	-30.0%	-41.7%
Climbing - Artificial Wall	1.5%	0.602	9+	NA	No Change
Climbing - Ice	0.1%	0.040	2+	NA	No Change
Cross-Country/Nordic Skiing	0.4%	0.161	8+	-60.0%	-69.2%
Fly-Fishing	1.0%	0.401	15+	NA	+25.0%
Hiking	4.3%	1.7	14+	+7.5%	-28.3%
Paddlesports - All Types	4.6%	1.9	5+	NA	-4.2%
Canoeing	2.8%	1.1	6+	+40.0%	+16.7%
Rafting	2.1%	0.843	3+	+110.0%	+5.0%
Kayaking - All Types	0.6%	0.241	5+	+200.0%	-60.0%
Kayaking - Recreation/St-on-Top	0.4%	0.161	7+	NA	-33.3%
Kayaking - Touring/Sea	0.3%	0.120	6+	NA	-62.5%
Kayaking - Whitewater	0.1%	0.040	3+	NA	-66.7%
Snowshoeing	0.1%	0.040	6+	-50.0%	-50.0%
Telemark Skiing	0.9%	0.361	6+	+350.0%	+125.0%
Trail Running	5.1%	2.0	49+	+27.5%	+13.3%

16-24 YEAR OLD ENTHUSIAST TRENDS – 2003 COMPARED TO 2002*

GREW*



DECLINED*



FLAT*



* Conclusions based on significant differences between Enthusiast incidence in 2003 and 2002

16-24 YEAR OLD ENTHUSIAST TRENDS – 2003 COMPARED TO 2001*

GREW*

Camping (Away from Car)

Telemark Skiing

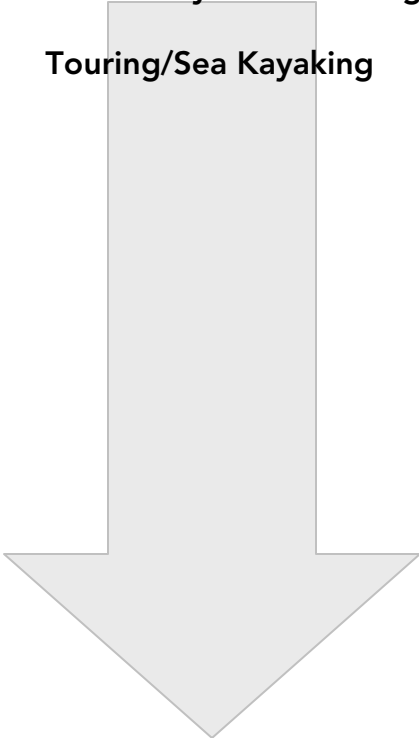
A large, light gray arrow pointing upwards, indicating growth in participation for the activities listed to its left.

DECLINED*

Backpacking

Cross-Country/Nordic Skiing

Touring/Sea Kayaking

A large, light gray arrow pointing downwards, indicating a decline in participation for the activities listed to its left.

FLAT*

Paved Road Bicycling

Single Track Bicycling

Dirt Road Bicycling

Bird Watching

Car Camping

Natural Rock Climbing

Artificial Wall Climbing

Ice Climbing

Fly-Fishing

Hiking

Canoeing

Rafting

Recreation/Sit-on-Top Kayaking

Whitewater Kayaking

Snowshoeing

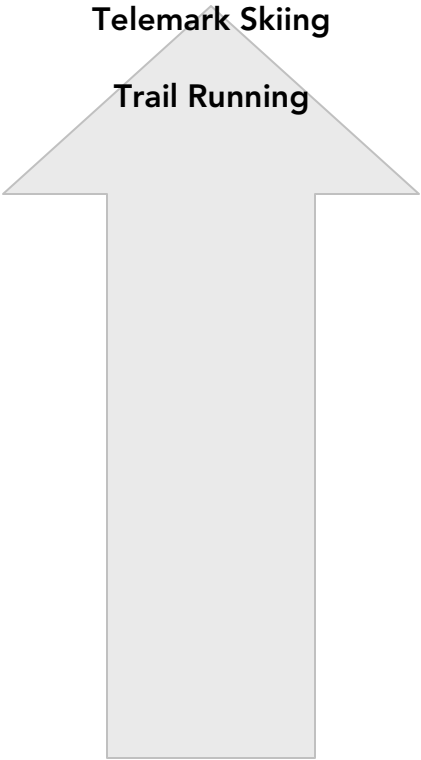
Trail Running

A large, light gray arrow pointing horizontally, indicating flat participation for the activities listed to its right.

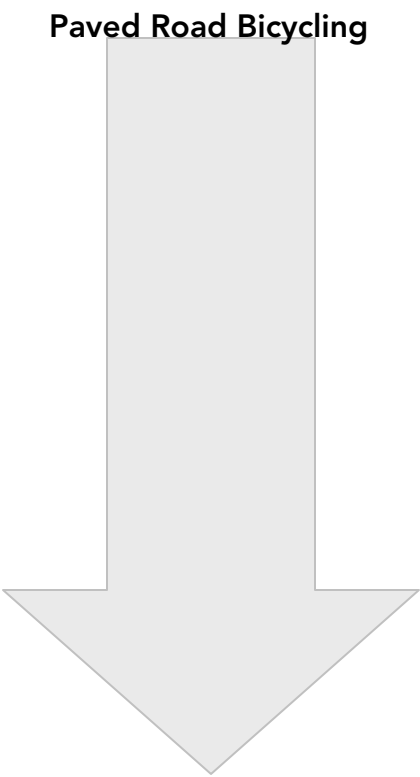
* Conclusions based on significant differences between Participant incidence in 2003 compared to 2001.

16-24 YEAR OLD ENTHUSIAST TRENDS – 2003 COMPARED TO 1998*

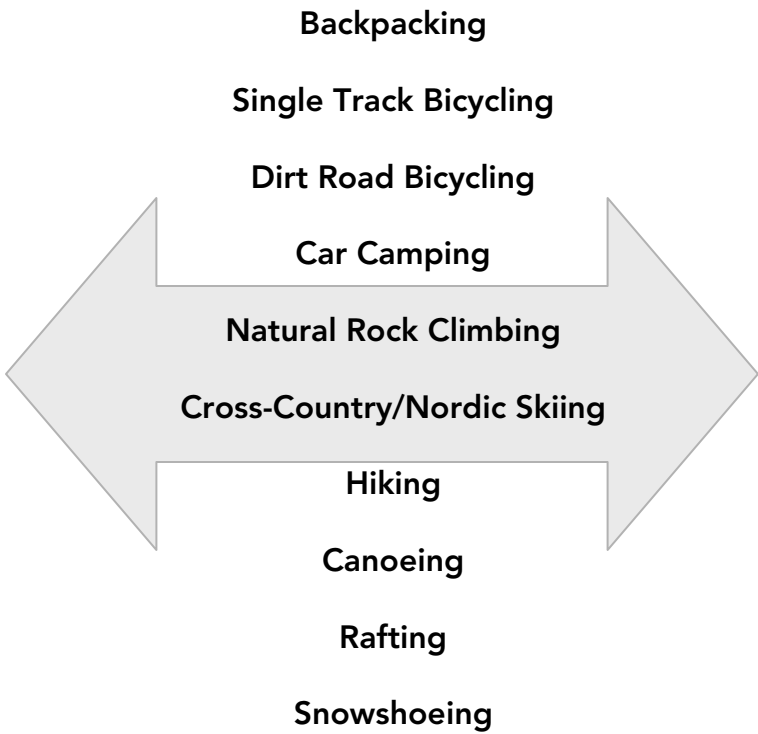
GREW*



DECLINED*



FLAT*

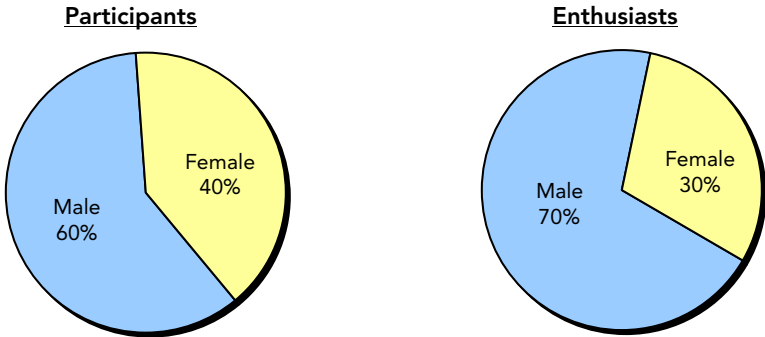


Note: Comparative data from 1998 not available for bird watching, camping (away from car), artificial wall climbing, ice climbing, fly-fishing, touring/sea kayaking, recreation/sit-on-top kayaking, whitewater kayaking.

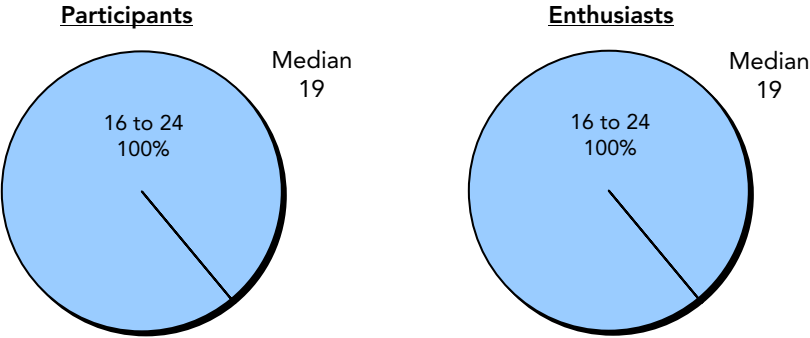
* Conclusions based on significant differences between Participant incidence in 2003 compared to 1998.

16 – 24 YEAR OLD DEMOGRAPHIC PROFILE IN YEAR 2003

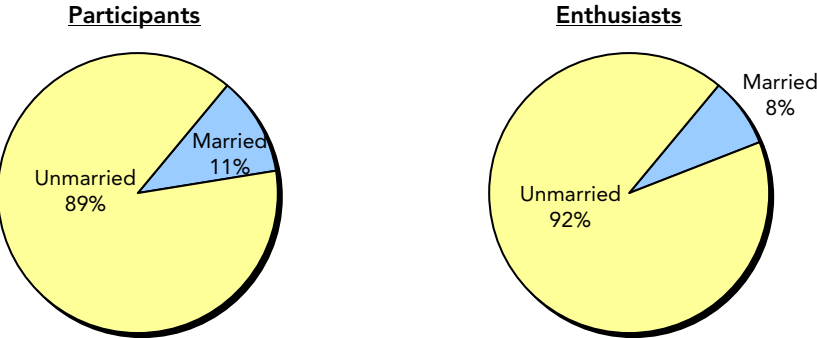
GENDER



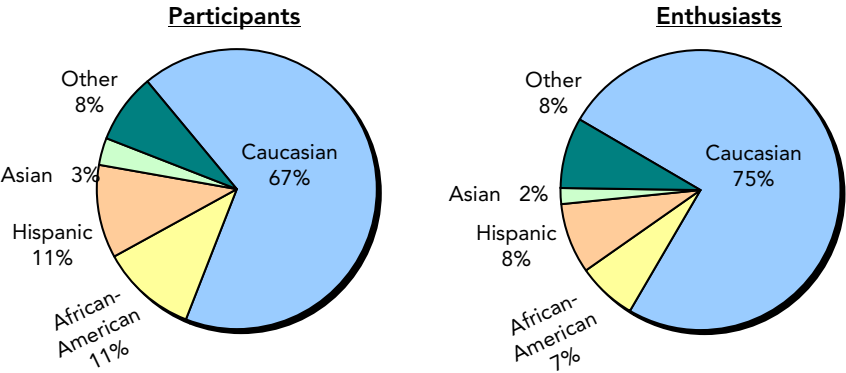
AGE



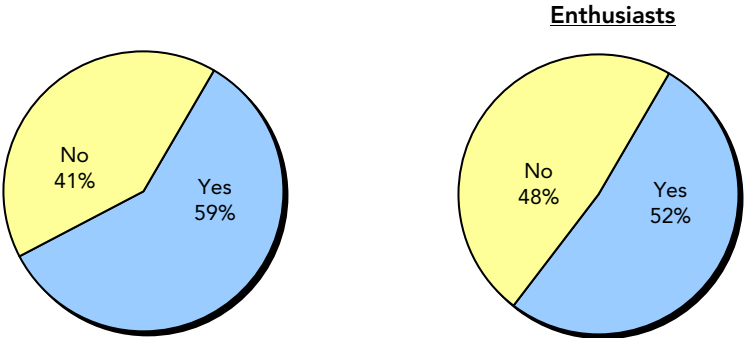
MARITAL STATUS



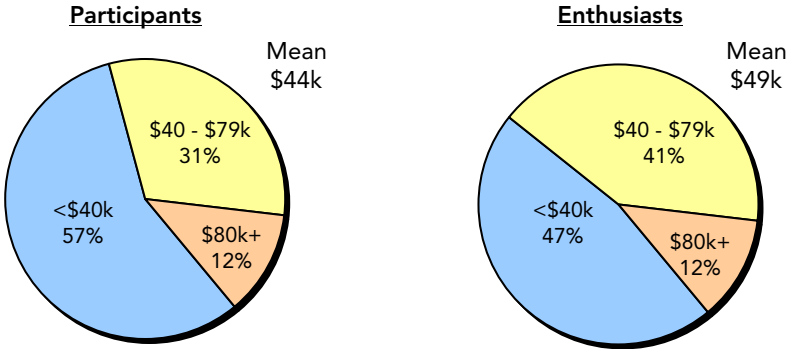
ETHNICITY



PRESENCE OF CHILDREN <18 in HOUSEHOLD

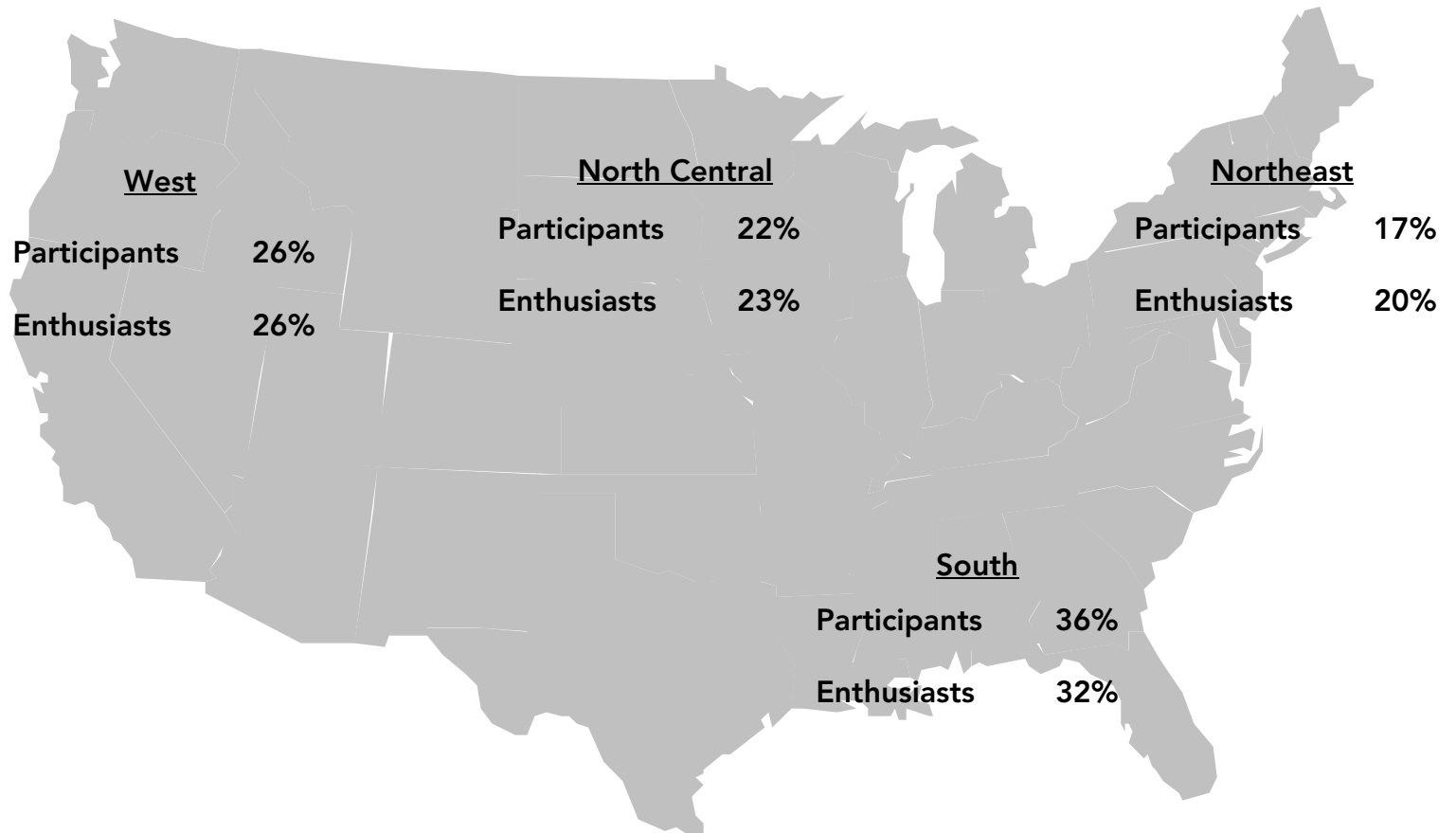


HOUSEHOLD INCOME



16 – 24 YEAR OLD REGIONAL PROFILE YEAR 2003

Year 2003 Participants and Enthusiasts between the ages of 16 and 24 are most likely to live in the South, followed by the West and North Central regions.



OUTDOOR RECREATION PARTICIPATION STUDY
FEMALE PARTICIPATION

FEMALE AMERICANS 16 AND OLDER

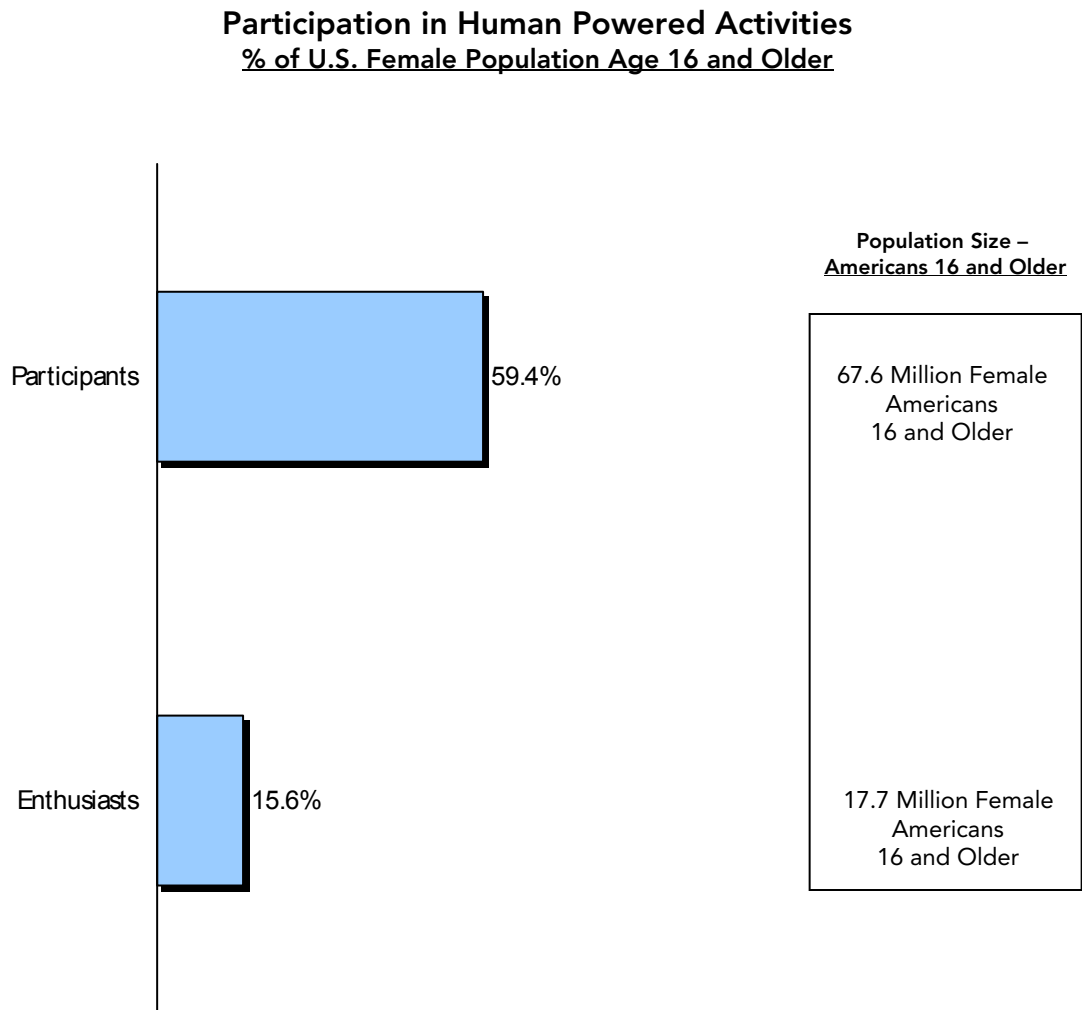
Headlines

- In 2003, there were **67.6 million** female Americans 16 and older who participated in human powered activities and **17.7 million** Enthusiasts.
- Participant activity in 2003 is down from 2002 and 2001 levels, but Enthusiast activity is up 5% from 2002
- Only paved road bicycling experienced a significant increase in Participant activity
- Several activities saw declines in female Participant levels in 2003 compared to 2002 – bird watching, natural rock and ice climbing, cross-country/Nordic skiing, and whitewater kayaking
- Compared to the previous year, female Enthusiast activity levels in 2003 reveal a mix of short-term trends – backpacking, bird watching and fly-fishing are down; bicycling (overall), camping (particularly car camping), and snowshoeing are up; all other activities remain unchanged
- The Year 2003 Participant and Enthusiast populations are comprised of females of all ages, median ages of 37 and 35 respectively
- Year 2003 female Participants and Enthusiasts are most likely to reside in the South, followed by the North Central region

FEMALE PARTICIPANT & ENTHUSIAST LEVELS IN YEAR 2003

During 2003, nearly 68 million female Americans 16 and older participated in at least one human powered activity – equal to 59.4% of the entire population.

Nearly 18 million female Americans 16 and older participated in at least one human powered activity at Enthusiast levels during in 2003.

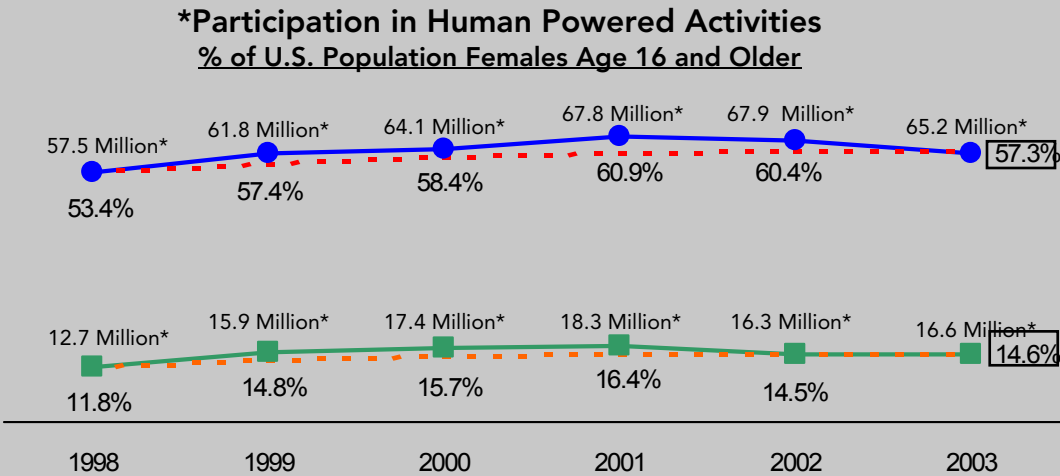


FEMALE PARTICIPANT & ENTHUSIAST TRENDS

In 2003, nearly 65 million female Americans participated in at least one of the core Outdoor Industry Association human powered activities tracked since 1998 – down 5% from the peak levels of participation measured in 2001 and 2002.

Despite an overall decline in Participant activity, overall Enthusiast levels among female Americans remains stable in 2003; nearly 17 million across all three years.

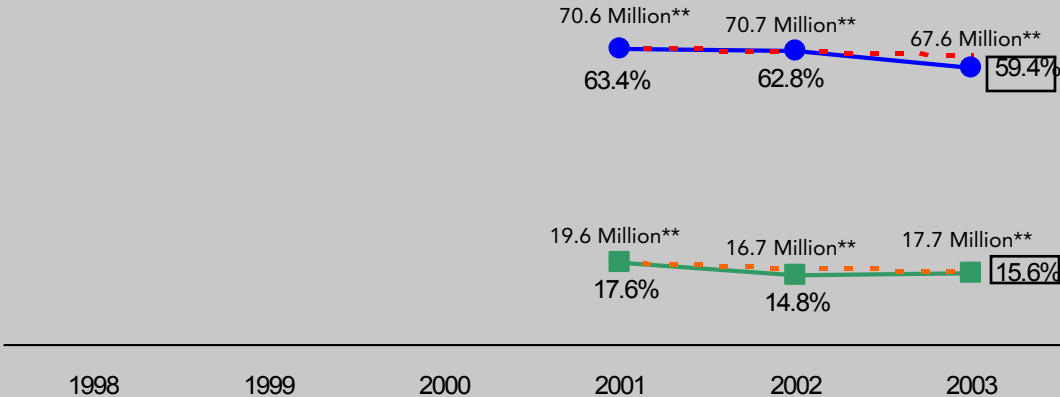
Participant and Enthusiast levels in 2003 are both higher than in 1998.



Year 2003 Participant activity in at least one of the full range of Outdoor Industry Association human powered activities is down 5% from both 2001 and 2002 levels among females 16 and older.

Enthusiast activity in at least one of the full range of activities tracked is flat in 2003 when compared to 2002.

In 2003, Enthusiast activity among female Americans registers at lower levels than in 2001.



- Participants
- Enthusiasts (Within Top 15% of Frequency)
- - - Participant Rolling Trend
- - - Enthusiast Rolling Trend (Within Top 15% of Frequency)

* Includes ONLY activities tracked since 1998.
 ** Includes ALL activities.

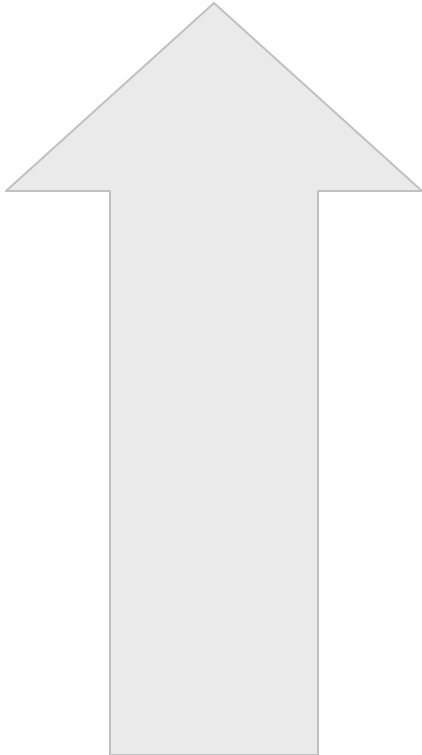
☐ = Significant difference from 2001

FEMALE PARTICIPANT LEVELS

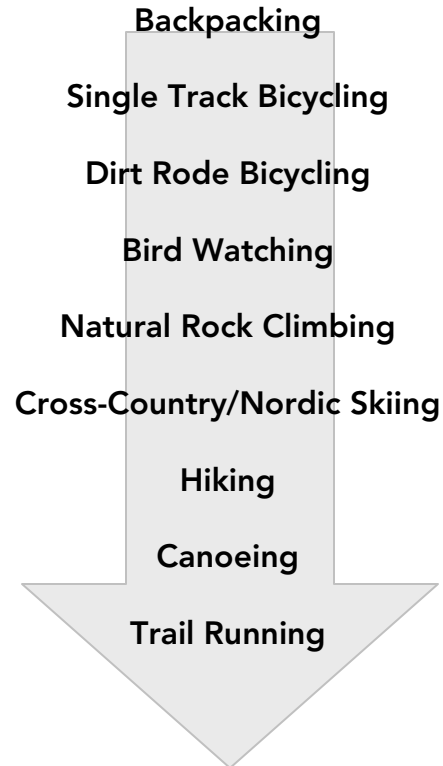
			LONG TERM PERSPECTIVE	SHORT TERM PERSPECTIVE
Activity	Incidence of Participation Among Female Americans 16 and Older in 2003	Participant Population (Millions)	% Change in Incidence of Participant Activity 2003 Compared to 1998	% Change in Incidence of Participant Activity 2003 Compared to 2001
Human Powered Activities - All Types	59.4%	67.6	NA	-6.3%
Backpacking	3.7%	4.2	-15.9%	-22.9%
Bicycling - All Types	34.9%	39.4	NA	-10.7%
Bicycling - Paved Road	31.4%	35.7	-8.7%	-6.8%
Bicycling - Single Track	13.6%	15.5	-10.5%	-23.6%
Bicycling - Wide Dirt Road	13.7%	15.6	-15.4%	-23.0%
Bird Watching	6.6%	7.5	NA	-21.4%
Camping - All Types	26.9%	30.6	NA	+0.7%
Car Camping	22.4%	25.5	-5.1%	+5.7%
Camping (Away from Car)	4.4%	5.0	+7.3%	-18.5%
Climbing with Rope/Harness - All Types	2.5%	2.8	NA	-10.7%
Climbing - Natural Rock	1.0%	1.1	-33.3%	-47.4%
Climbing - Artificial Wall	2.0%	2.3	NA	No Change
Climbing - Ice	0.2%	0.228	NA	No Change
Cross-Country/Nordic Skiing	3.8%	4.3	-5.0%	-25.5%
Fly-Fishing	3.1%	3.5	NA	No Change
Hiking	28.6%	32.5	-10.3%	-10.1%
Paddlesports - All Types	12.0%	13.7	NA	-16.1%
Canoeing	7.8%	8.9	+2.6%	-20.4%
Rafting	3.9%	4.4	+8.3%	-11.4%
Kayaking - All Types	3.5%	4.0	+105.9%	-14.6%
Kayaking - Recreation/St-on-Top	2.2%	2.5	NA	-4.3%
Kayaking - Touring/Sea	2.2%	2.5	NA	-21.4%
Kayaking - Whitewater	0.6%	0.682	NA	-33.3%
Snowshoeing	2.1%	2.3	+162.5%	-4.5%
Telemark Skiing	1.3%	1.5	+85.7%	-13.3%
Trail Running	12.7%	14.4	-2.3%	-16.4%

FEMALE PARTICIPANT TRENDS – 2003 COMPARED TO 2001*

GREW*



DECLINED*



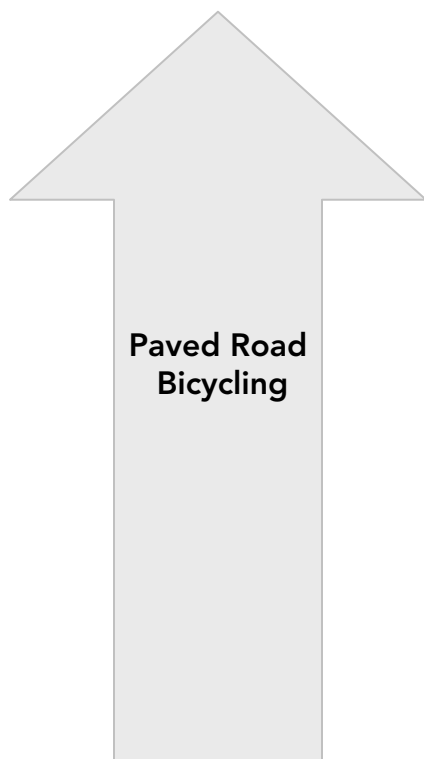
FLAT*



* Conclusions based on significant differences between Participant incidence in 2003 compared to 2001.

FEMALE PARTICIPANT TRENDS – 2003 COMPARED TO 2002*

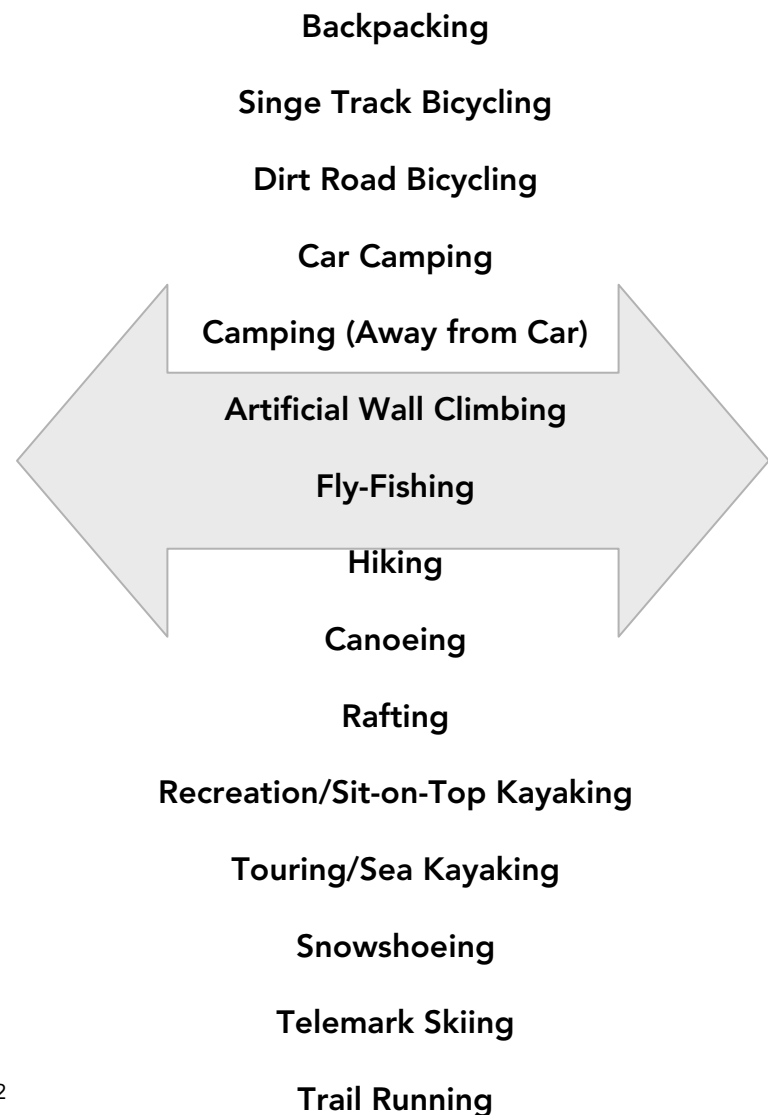
GREW*



DECLINED*



FLAT*



* Conclusions based on significant differences between Participant incidence in 2003 and 2002

FEMALE PARTICIPANT TRENDS – 2003 COMPARED TO 1998*

GREW*

Snowshoeing

A large, light gray arrow pointing upwards, indicating growth in participation for the activities listed under the 'GREW*' category.

DECLINED*

Dirt Road Bicycling

Hiking

A large, light gray arrow pointing downwards, indicating a decline in participation for the activities listed under the 'DECLINED*' category.

FLAT*

Backpacking

Paved Road Bicycling

Single Track Bicycling

Car Camping

Camping (Away from Car)

Natural Rock Climbing

Cross-Country/Nordic Skiing

Canoeing

Rafting

Telemark Skiing

Trail Running

A large, light gray arrow pointing horizontally, indicating flat participation for the activities listed under the 'FLAT*' category.

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

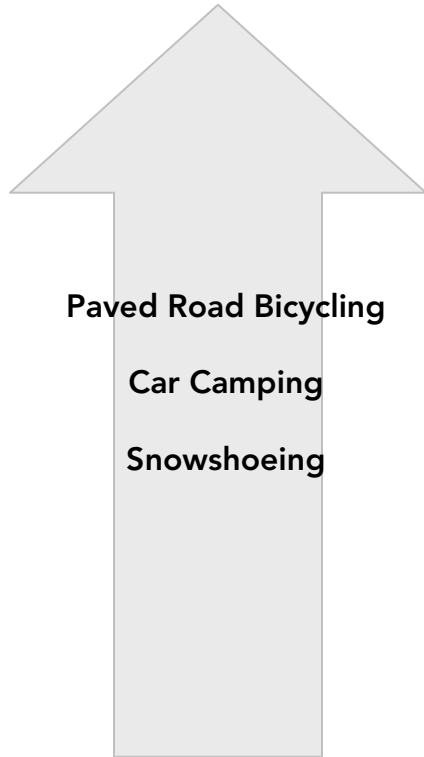
* Conclusions based on significant differences between Participant incidence in 2003 compared to 1998.

FEMALE ENTHUSIAST LEVELS

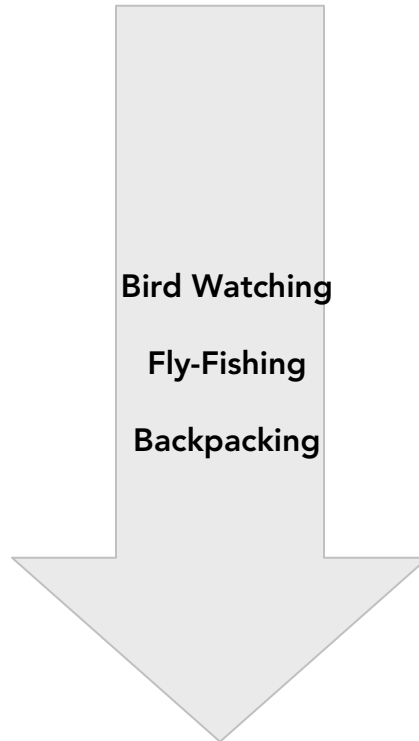
				LONG TERM PERSPECTIVE	SHORT TERM PERSPECTIVE
Activity	Incidence of Enthusiasts Among Female Americans 16 and Older in 2003	Enthusiast Population (Millions)	Enthusiast Frequency Level (2003)	% Change in Incidence of Enthusiast Activity 2003 Compared to 1998	% Change in Incidence of Enthusiast Activity 2003 Compared to 2001
Human Powered Activities - All Types	15.6%	17.7	NA	NA	-11.4%
Backpacking	0.2%	0.228	6+	-66.7%	-50.0%
Bicycling - All Types	6.8%	7.7	30+	NA	No Change
Bicycling - Paved Road	5.4%	6.1	49+	+92.9%	+28.6%
Bicycling - Single Track	1.6%	1.8	20+	+100.0%	-23.8%
Bicycling - Wide Dirt Road	1.6%	1.8	20+	+14.3%	-23.8%
Bird Watching	0.8%	0.910	20+	NA	-38.5%
Camping - All Types	3.5%	4.0	7+	NA	-20.5%
Car Camping	3.0%	3.4	7+	+36.4%	-21.1%
Camping (Away from Car)	0.4%	0.455	7+	NA	-50.0%
Climbing with Rope/Harness - All Types	0.2%	0.228	7+	NA	-50.0%
Climbing - Natural Rock	0.1%	0.114	11+	-50.0%	-50.0%
Climbing - Artificial Wall	0.1%	0.114	9+	NA	-50.0%
Climbing - Ice	0.05%	0.57	2+	NA	-50.0%
Cross-Country/Nordic Skiing	0.7%	0.796	8+	No Change	-22.2%
Fly-Fishing	0.1%	0.114	15+	NA	No Change
Hiking	4.3%	4.9	14+	+16.2%	-4.4%
Paddlesports - All Types	1.6%	1.8	5+	NA	-44.8%
Canoeing	0.8%	0.910	6+	+11.1%	-46.7%
Rafting	0.5%	0.569	3+	+150.0	-37.5%
Kayaking - All Types	0.4%	0.455	5+	+100.0%	-60.0%
Kayaking - Recreation/St-on-Top	0.3%	0.324	7+	NA	-40.0%
Kayaking - Touring/Sea	0.4%	0.455	6+	NA	-20.0%
Kayaking - Whitewater	0.1%	0.114	3+	NA	-50.0%
Showshoeing	0.3%	0.341	6+	+200.0%	No Change
Telemark Skiing	0.2%	0.228	6+	+100.0%	-33.3%
Trail Running	1.4%	1.6	49+	-6.7%	-39.1%

FEMALE ENTHUSIAST TRENDS – 2003 COMPARED TO 2002*

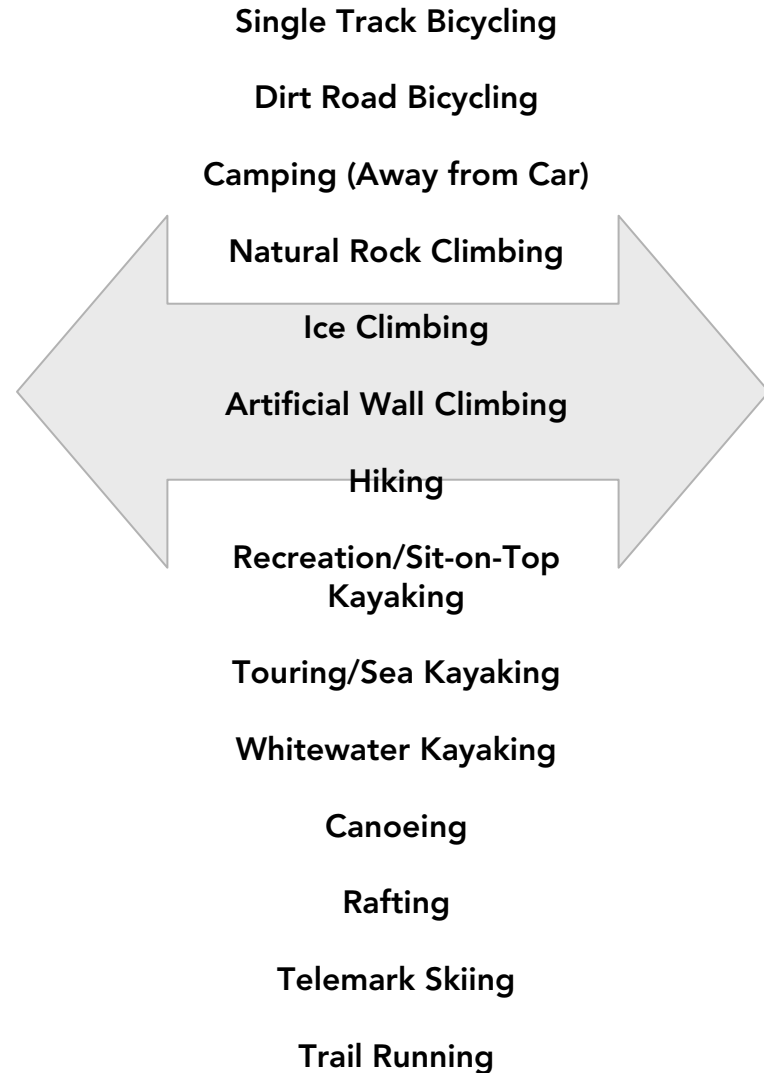
GREW*



DECLINED*



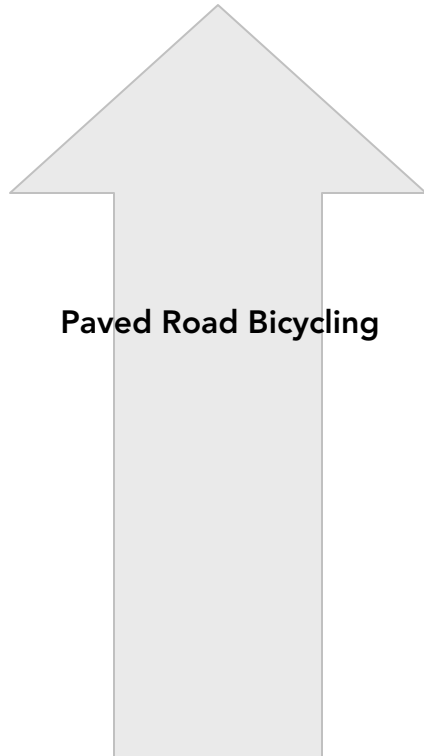
FLAT*



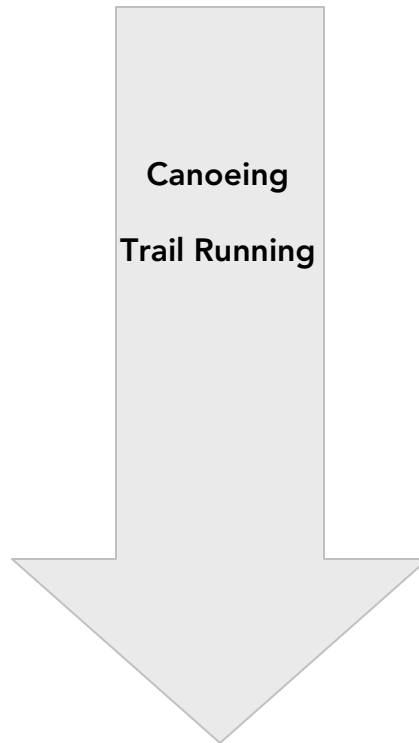
* Conclusions based on significant differences between Enthusiast incidence in 2003 and 2002

FEMALE ENTHUSIAST TRENDS – 2003 COMPARED TO 2001*

GREW*



DECLINED*



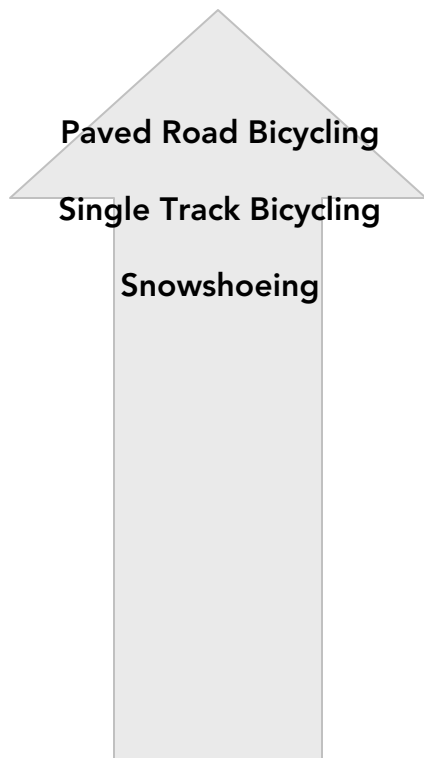
FLAT*



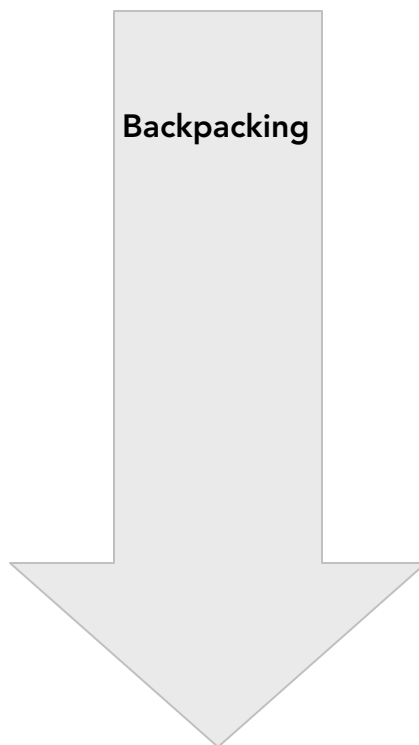
* Conclusions based on significant differences between Participant incidence in 2003 compared to 2001.

FEMALE ENTHUSIAST TRENDS – 2003 COMPARED TO 1998*

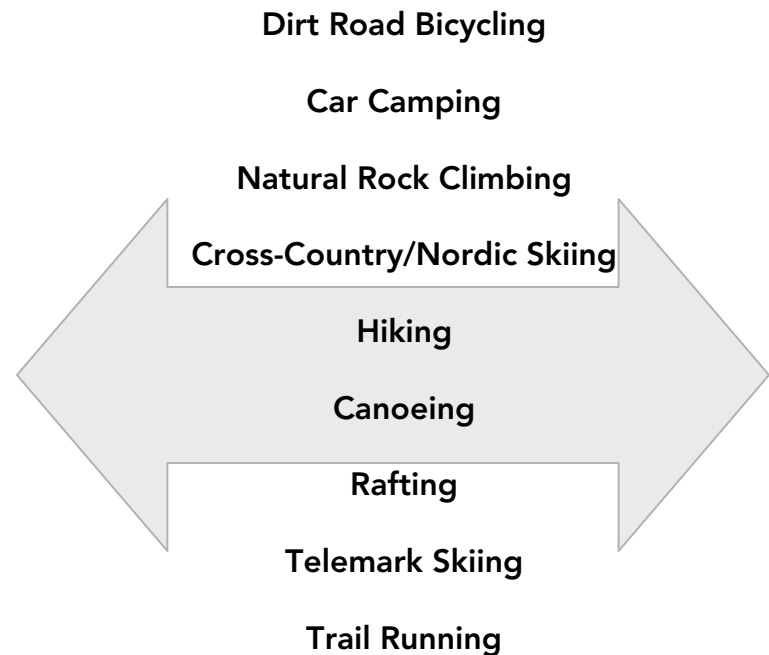
GREW*



DECLINED*



FLAT*

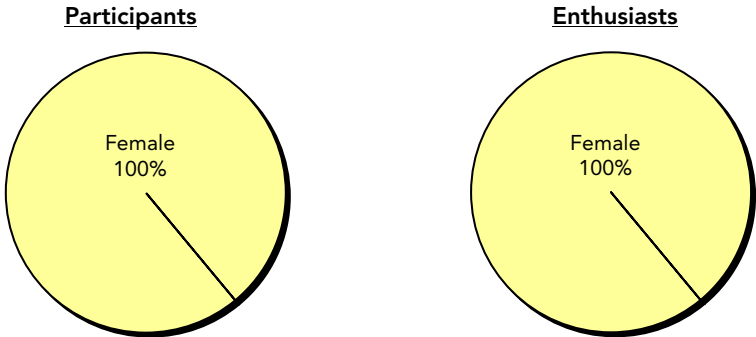


Note: Comparative data from 1998 not available for bird watching, camping (away from car), artificial wall climbing, ice climbing, fly-fishing, touring/sea kayaking, recreation/sit-on-top kayaking, whitewater kayaking.

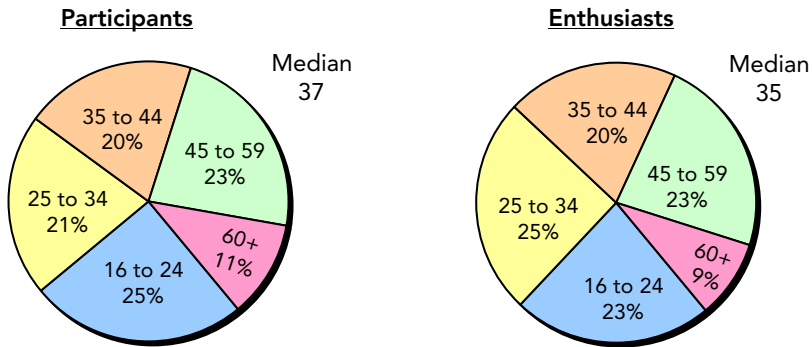
* Conclusions based on significant differences between Participant incidence in 2003 compared to 1998.

FEMALE DEMOGRAPHIC PROFILE IN YEAR 2003

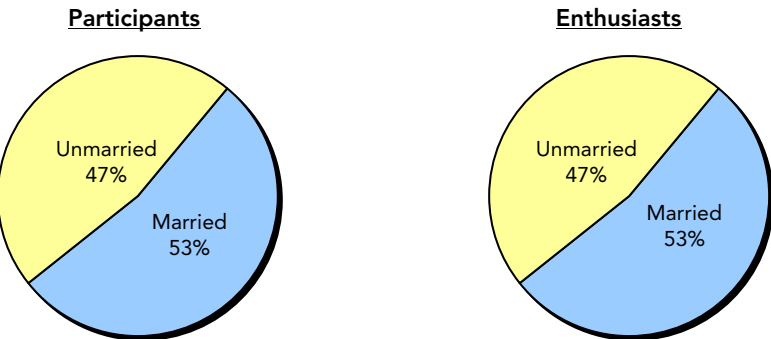
GENDER



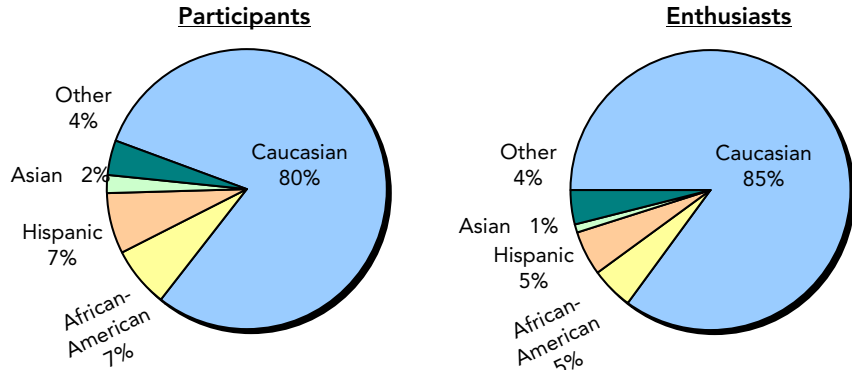
AGE



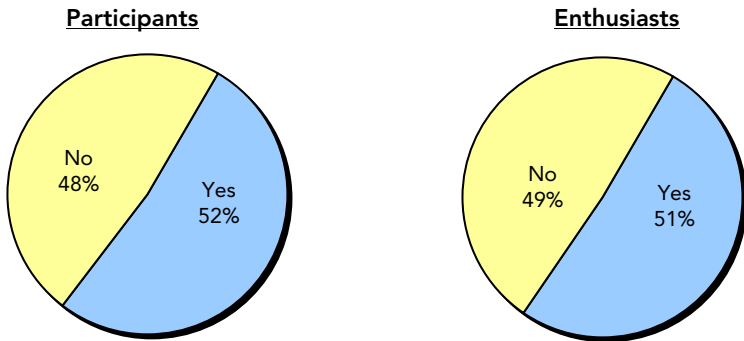
MARITAL STATUS



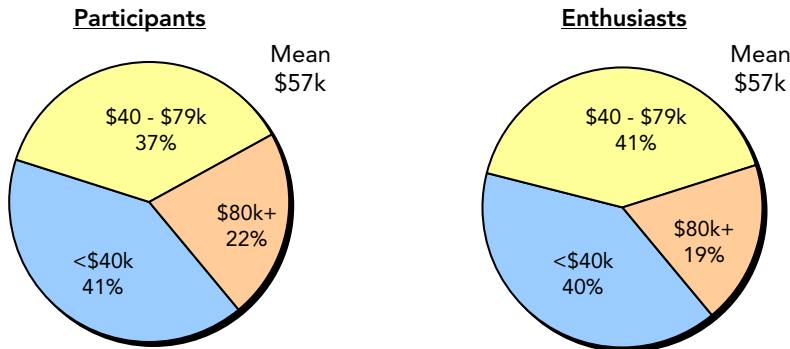
ETHNICITY



PRESENCE OF CHILDREN <18 in HOUSEHOLD

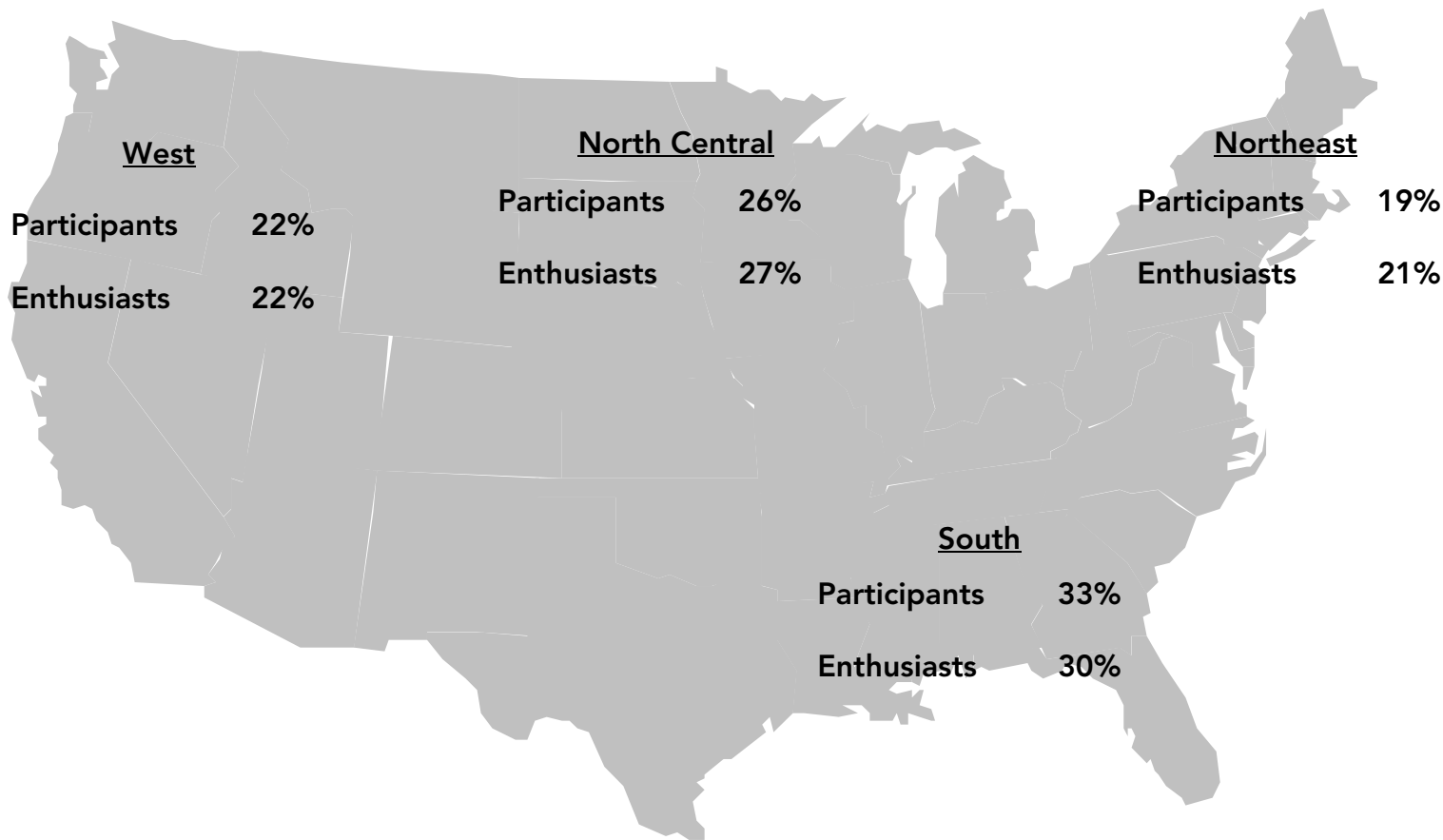


HOUSEHOLD INCOME



FEMALE REGIONAL PROFILE YEAR 2003

In 2003, female Participants and Enthusiasts are most likely to live in the South, followed by the North Central region.



BACKPACKING

Headlines

- Participation in backpacking during 2003 is flat from 2002 – nearly **14 million** Americans 16 and older went backpacking in 2003; levels down from the all-time high activity measured in the late 1990's
- In 2003, participation in backpacking at Enthusiast levels is down by 47% - revealing the smallest population of Enthusiasts in the past six years (**1.8 million**)
- Participants generated a total of 54 million backpacking outings in 2003; 31 million outings were sourced by Enthusiasts.
- The backpacking Participant and Enthusiast populations are comprised primarily of males
- Representation of 16 to 34 year-old Americans within the Participant and Enthusiast populations is strong
- The median age in 2003 is three years younger than in 2001 (27).
- Americans participating in backpacking during year 2003 are particularly likely to live in the South region
- Backpackers report high levels of crossover participation in other outdoor-wilderness activities – hiking and camping (away from the car) particularly

The average number of times that Participants went backpacking in 2003 is four.

During the year, nearly three-quarters (70%) of Participants went backpacking less than the average number of times (one to three outings) and nearly one quarter (21%) went backpacking more than average (five or more times). More than one-third (35%) of Participants went backpacking only one time in 2003

OUTDOOR RECREATION PARTICIPATION STUDY

BACKPACKING

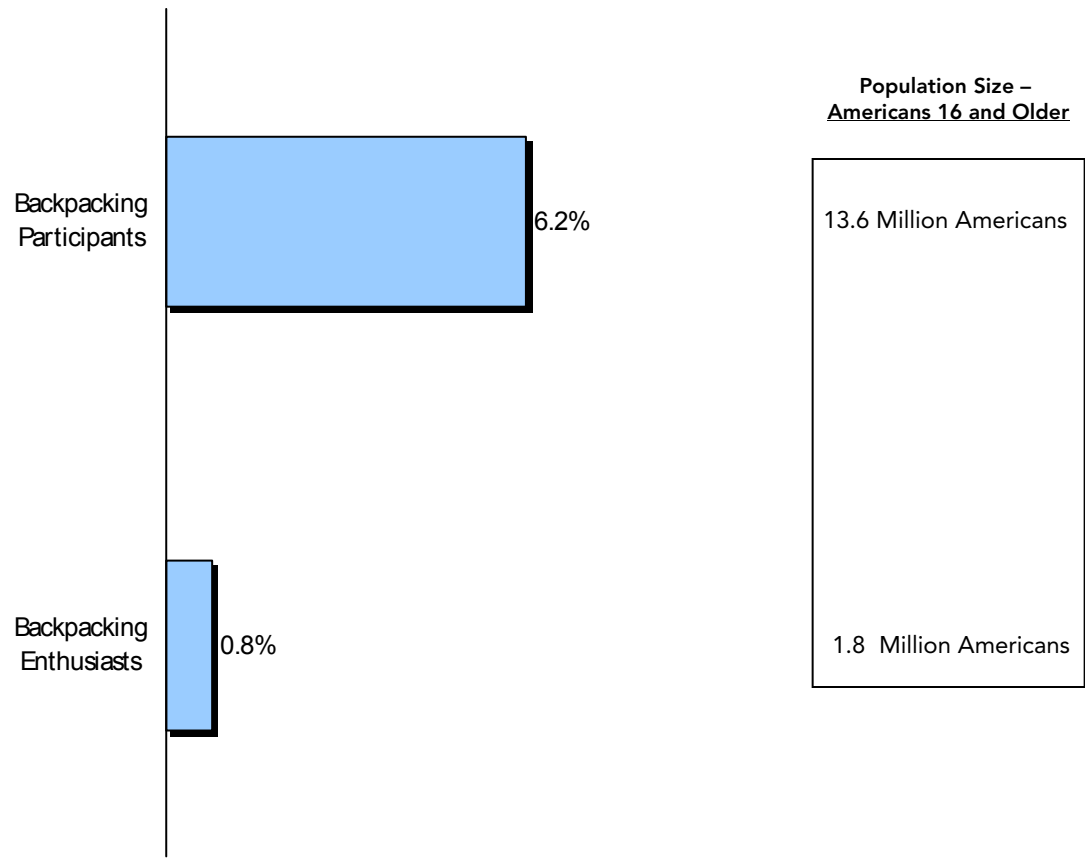
"Have you gone on an overnight backpacking trip of more than one-quarter mile from where you parked your vehicle?"

BACKPACKING PARTICIPANT & ENTHUSIAST LEVELS IN YEAR 2003

Participation in Backpacking
% of U.S. Population Age 16 and Older

During 2003, 6.2% of Americans 16 and older went backpacking more than a quarter of a mile from their vehicle and stayed for a minimum of one night. The backpacking Participant population in 2003 is equal to 13.6 million Americans 16 and older.

Nearly two million Americans 16 and older participated in backpacking at Enthusiast levels (6 or more times) during in 2003.



BACKPACKING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:
Backpacking remains popular among Americans 16 and older, but recent participation does not match the levels reported in the late 1990's.

Short-term Perspective (Compared to 2002):
In 2003, participation levels held steady with the previous year – with approximately 14 million Americans participating in backpacking during the year.

The incidence of Americans who backpacked at Enthusiast levels (six or more times) declined significantly in 2003 from the record high number of Enthusiasts identified in 2002 – down 47%.

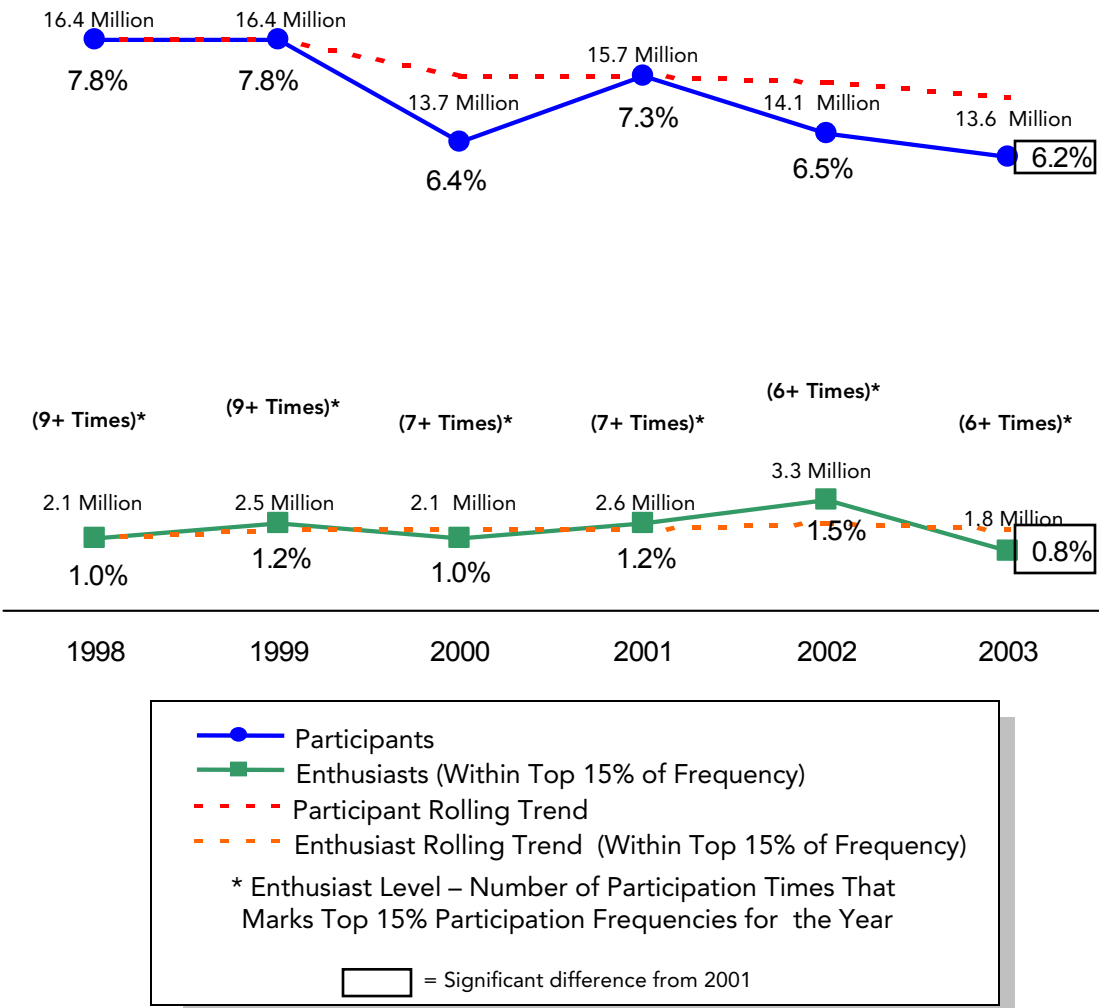
Three-Year Perspective (Compared to 2001):
Recent backpacking Participant and Enthusiast levels are lower than in 2001, a year when the activity enjoyed renewed attention among Americans 16 and older.

Long-term Perspective (Compared to 1998):
The 13.6 million Americans who went backpacking in 2003 is down from the high levels reported in 1998 (16.4 million) and 1999 (16.4 million).

While the Enthusiast population remained stable, the frequency of their participation slowly dissipates, showing a slight decrease in enthusiast activity.

Cumulative Perspective (Rolling Trend):
The rolling trend results show a slight decline in backpacking participation over the last six years,

**Participation in Backpacking
% of U.S. Population Age 16 and Older**

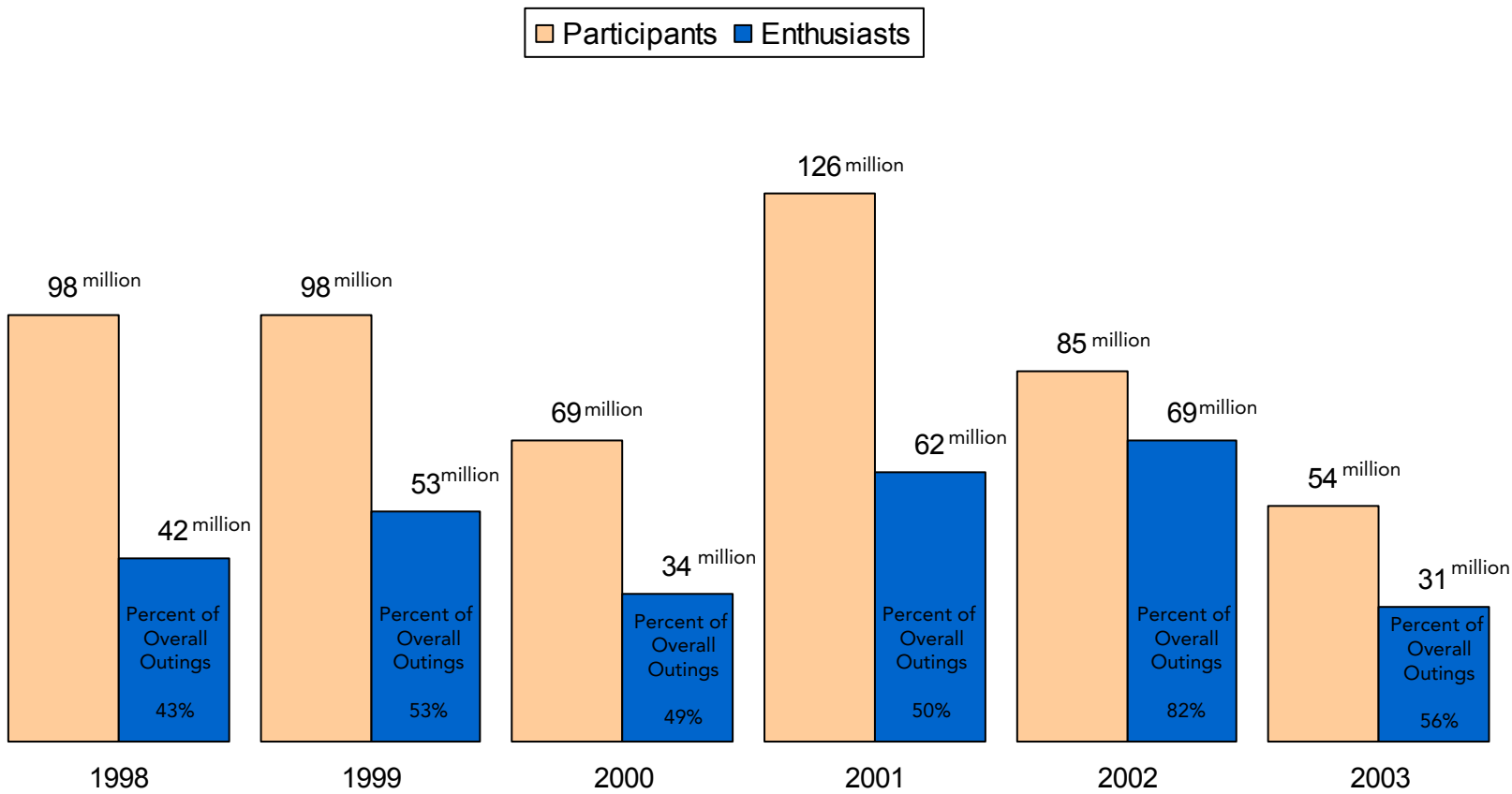


TOTAL NUMBER OF BACKPACKING OUTINGS PER YEAR*

Americans 16 and older generated a total of 54 million backpacking outings during 2003 – down from the record number of backpacking outings reported in 2001 (126 million). The comparatively low number of backpacking outings in 2003 is the result of fewer Americans 16 and older participating in the activity and the limited number of outings taken during the year by Participants.

Continuing a trend since 1999, more than half of the total backpacking outings came from Enthusiasts. In 2003, Enthusiasts accounted for 31 million backpacking outings, 56% of total backpacking outings taken during the year.

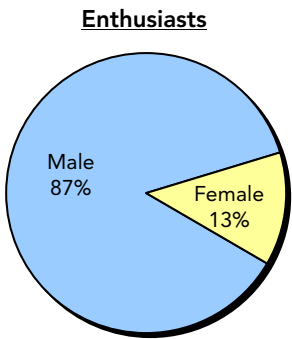
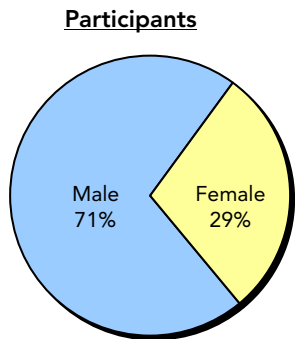
Backpacking Outings in Each Year



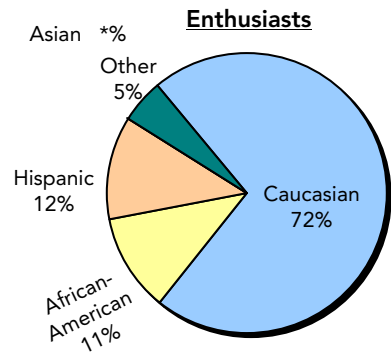
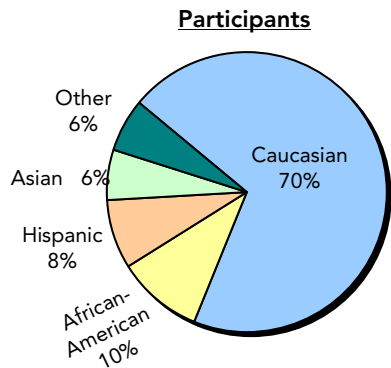
Number of backpacking occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went backpacking in each year

BACKPACKING DEMOGRAPHIC PROFILE IN YEAR 2003

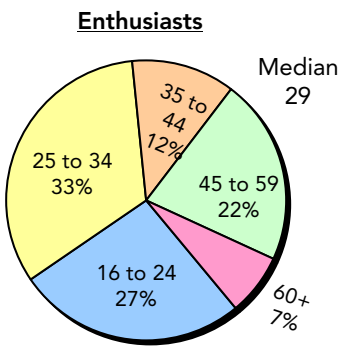
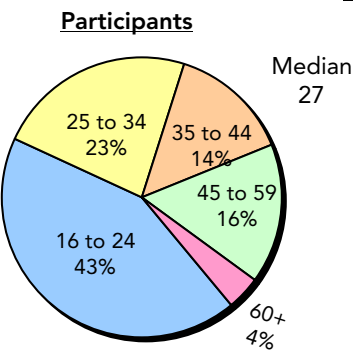
GENDER



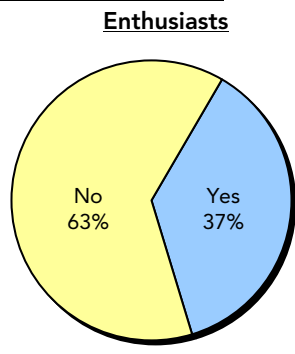
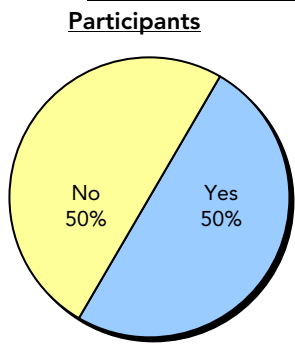
ETHNICITY



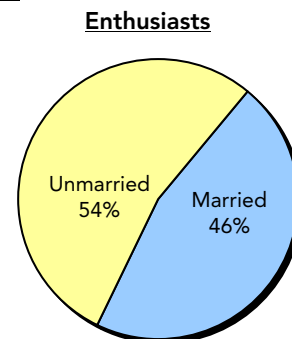
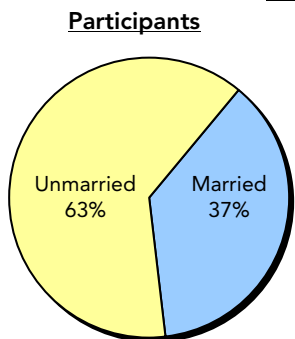
AGE



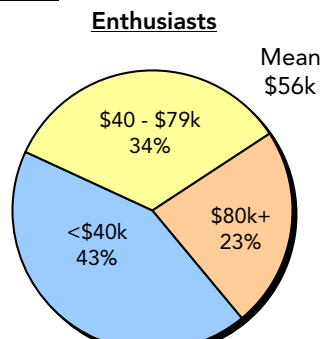
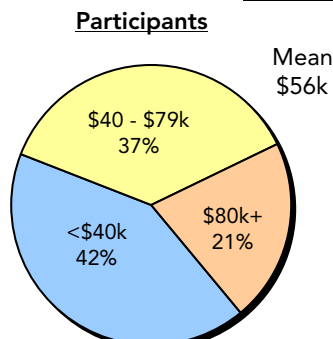
PRESENCE OF CHILDREN <18 in HOUSEHOLD



MARITAL STATUS



HOUSEHOLD INCOME



* = Less than 1%

BACKPACKING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- Nearly three-quarters (71%) of Americans who went backpacking in 2003 are male – an historically consistent finding.
- The 2003 backpacking Participant population is comprised primarily of younger Americans. Two-thirds (66%) of Participants are between the ages of 16 and 34. The median age of year 2003 Participants is 27 – younger by more than three years than in 2001 (30).
- In 2003, the ethnic composition of the Participant population continues to be primarily Caucasian (70%). However, the activity population is more ethnically inclusive compared to the populations of the late 1990's.

<u>Dimension</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>
<u>Gender</u>						
Male	71%	71%	71%	67%	71%	71%
Female	29%	29%	29%	33%	29%	29%
<u>Age</u>						
16 to 24	39%	32%	42%	41%	43%	43%
25 to 34	23%	29%	26%	24%	18%	23%
35 to 44	21%	22%	17%	17%	16%	14%
45+	17%	17%	16%	18%	23%	20%
<u>Marital Status</u>						
Married	34%	41%	35%	31%	33%	37%
Unmarried	66%	58%	65%	69%	67%	63%
<u>Ethnicity</u>						
Caucasian	84%	83%	79%	79%	79%	70%
African-American	4%	7%	5%	8%	7%	10%
Hispanic	5%	4%	7%	8%	7%	8%
Asian	5%	4%	5%	3%	4%	6%
<u>Children <18</u>						
Yes	4%	49%	54%	36%	41%	50%
<u>Household Income</u>						
<\$40k	NA	33%	37%	48%	43%	42%
\$40k - \$79k	NA	35%	41%	39%	31%	37%
\$80k+	NA	18%	22%	12%	26%	21%
<u>Region</u>						
Northeast	21%	17%	7%	21%	15%	20%
South Central	36%	37%	30%	32%	38%	37%
North Central	13%	19%	27%	16%	21%	11%
West	31%	27%	35%	31%	25%	32%

BACKPACKING DEMOGRAPHIC PROFILE TRENDS OF ENTHUSIASTS

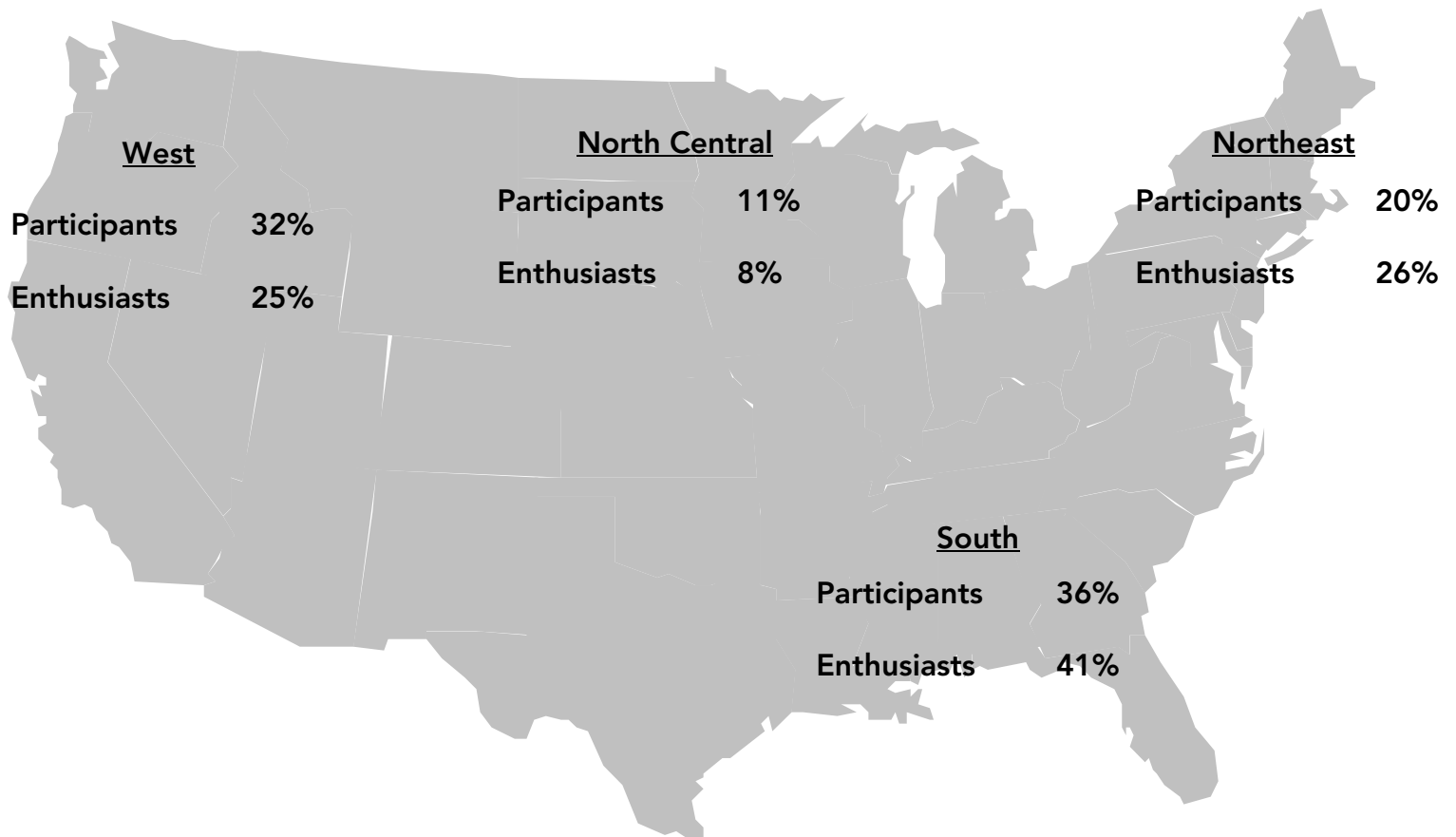
- Year 2003 Americans who went backpacking six or more times are more likely to be male than female by a wide margin (87% compared to 13%). The representation of males within the Enthusiast population has increased significantly since 1998.
- The percentage of Enthusiasts between the ages of 16 to 24 reached an all time low in 2003 (27%), but was compensated by a spike in the representation of Enthusiasts 45 years and older. The median age of year 2003 Enthusiasts is 29.
- Overall, year 2003 Enthusiasts report average levels of income (mean of \$56,000) and the segment is less affluent than their 2000 counterparts who reported a mean income of \$70,000.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	65%	89%	65%	81%	85%	87%
Female	35%	11%	35%	19%	15%	13%
Age						
16 to 24	39%	31%	42%	45%	49%	27%
25 to 34	22%	36%	27%	26%	14%	33%
35 to 44	17%	22%	15%	13%	14%	12%
45+	22%	11%	15%	16%	23%	29%
Marital Status						
Married	34%	41%	35%	35%	37%	46%
Unmarried	66%	58%	65%	65%	63%	54%
Ethnicity						
Caucasian	90%	74%	89%	87%	76%	72%
African-American	5%	6%	4%	9%	8%	11%
Hispanic	5%	6%	8%	2%	8%	12%
Asian	*	2%	*	2%	3%	*
Children <18						
Yes	39%	31%	65%	34%	35%	37%
Household Income						
<\$40k	NA	42%	37%	32%	58%	43%
\$40k - \$79k	NA	33%	41%	55%	18%	34%
\$80k+	NA	19%	22%	13%	24%	23%
Region						
Northeast	15%	19%	4%	22%	25%	26%
South Central	46%	36%	40%	44%	31%	41%
North Central	15%	14%	24%	7%	8%	8%
West	23%	31%	32%	27%	36%	25%

BACKPACKING REGIONAL PROFILE IN YEAR 2003

In 2003, backpacking Participants live primarily in two U.S. regions - the South (36%), followed by the West (32%).

Enthusiast backpackers (six or more times in 2003) tend to live in the South (41%) region.



BACKPACKING CROSSOVER ACTIVITY IN YEAR 2003

During 2003, backpackers report crossover participation in a range of other activities not surprisingly, backpacker's top three crossover activities align themselves with their interest in backpacking.

Hiking (75%) and camping away from the car (56%) reveal the largest crossover populations among backpackers in 2003 – 10.2 million and 7.6 million respectively.

Notable levels of year 2003 backpackers also participated in bicycling of all types and trail running during the year.

Activities	Backpackers - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Backpacking	100.0%	13.6
Hiking	75.0%	10.2
Camping (Away from Car)	56.2%	7.6
Bicycling - Paved Road	52.1%	7.1
Trail Running	41.9%	5.7
Bicycling - Dirt Road	41.0%	5.6
Bicycling - Single Track	40.0%	5.4
Canoeing	29.3%	4.0
Car Camping	23.8%	3.2
Rafting	20.1%	2.7
Fly-Fishing	20.1%	2.7
Bird Watching	14.8%	2.0
Climbing - Natural Rock	14.2%	1.9
Cross-Country/Nordic Skiing	13.3%	1.8
Climbing - Artificial Wall	11.4%	1.6
Kayaking - Recreation/St-on-Top	10.9%	1.5
Snowshoeing	10.6%	1.4
Kayaking - Touring/Sea	8.9%	1.2
Telemark Skiing	5.2%	0.701
Kayaking - Whitewater	3.0%	0.408
Climbing - Ice	2.2%	0.299

OUTDOOR RECREATION PARTICIPATION STUDY

BICYCLING

"Have you gone bicycling on a paved road?"

"Have you gone bicycling on a dirt track less than five feet wide?"

"Have you gone bicycling on a dirt road more than five feet wide?"

BICYCLING

Headlines

PAVED ROAD BICYCLING

- Paved road bicycling participation surged in 2003. Participants levels are up 8% and Enthusiast levels increased 19%
- Participants generated a total of 2.7 billion paved road bicycling outings in 2003; 1.9 billion outings were sourced by Enthusiasts.

The average number of times that Participants went paved road bicycling in 2003 is 34.

During the year, more than three-quarters (77%) of Participants went paved road bicycling less than the average number of times and nearly one in five (18%) went paved road bicycling more than average. Fewer than one in 10 (6%) of Participants went paved road bicycling only one time in 2003

SINGLE TRACK BICYCLING

- Year 2003 single track bicycling Participant levels declined from 2002 levels; Enthusiast levels remain unchanged
- In 2003, Participants generated a total of 590 million single track bicycling outings; 455 million outings were sourced by Enthusiasts.

The average number of times that Participants went single track bicycling in 2003 is 15.

More than three-quarters (78%) of Participants went single track bicycling less than the average number of times and nearly one in five (18%) went single track bicycling more than average. Slightly more than one in 10 (14%) went single track bicycling only one time in 2003.

DIRT ROAD BICYCLING

- Year 2003 dirt road bicycling maintained 2002 Participant and Enthusiast levels
- Participants generated a total of 587 million dirt road bicycling outings in 2003; 436 million outings were sourced by Enthusiasts.

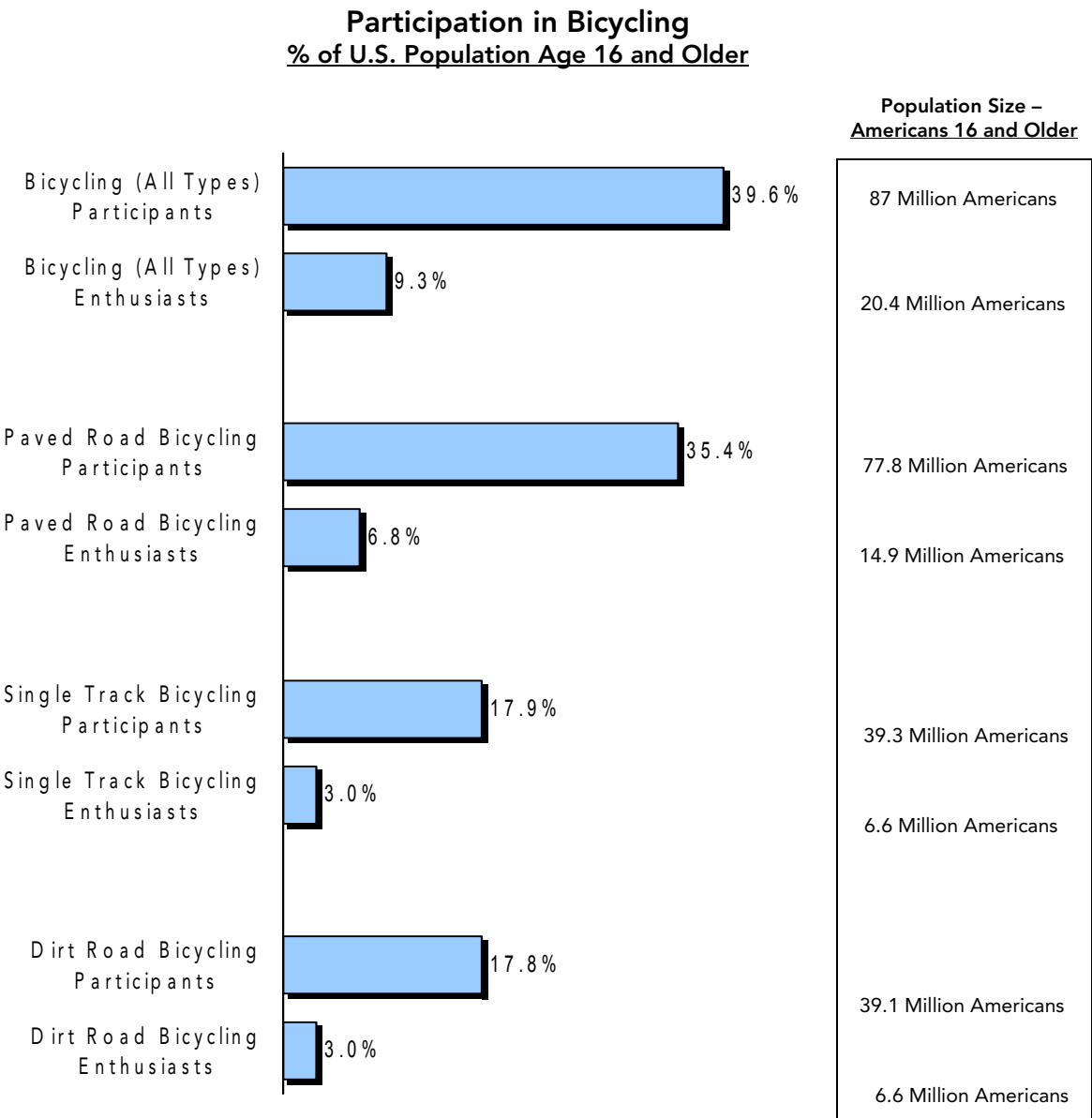
Participants went dirt road bicycling an average of 15 times.

Most Participants (81%) went dirt road bicycling less than the average number of times. More than one in 10 (12%) went dirt road bicycling more than average. One in six (16%) Participants went dirt road bicycling paved only one time in 2003

BICYCLING PARTICIPANT & ENTHUSIAST LEVELS IN YEAR 2003

In 2003, overall bicycling (all types) Participants number **87 million** Americans. Enthusiasts exceed **20 million**. Both populations are the largest of any activity.

Within the specific types of bicycling, paved roads yields the largest Participant population. 77.8 million bicyclists or 35.4% of Americans 16 and older take advantage of the accessibility and lack of technical skills necessary to ride the road. The Enthusiast road riding population (49 or more times) totals nearly 15 million Americans.



PAVED ROAD BICYCLING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective: Participation in paved road bicycling has been cyclical over the past six years, but the activity was hot again in 2003.

Short-term Perspective (Compared to 2002): Participant activity increased sharply in 2003 (up 8.3%). The nearly 78 million Americans who went paved road bicycling in 2003 represent the single largest Participant population of any human powered activity tracked.

Enthusiast activity also increased in 2003 – up 31% to reveal a population of nearly 15 million Americans 16 and older who went bicycling on paved roads 49 or more times in 2003.

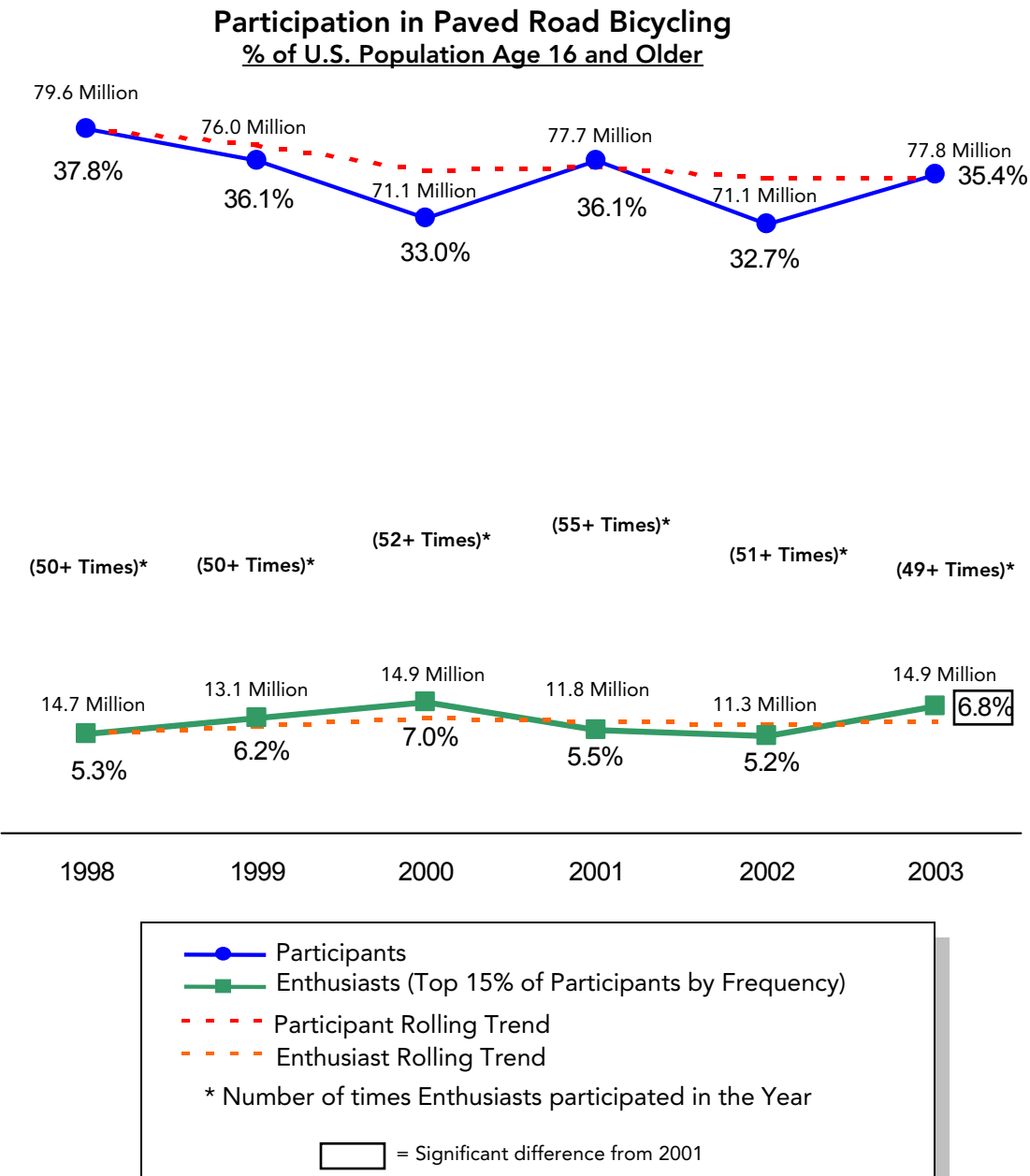
Three-Year Perspective (Compared to 2001): In 2003, participation in paved road bicycling has regained alignment with 2001 levels.

Enthusiast levels are higher than three years ago.

Long-term Perspective (Compared to 1998): Despite renewed involvement in 2003, Participant levels remain below the all time high participation reported in 1998.

Frequency of participation remained relatively stable as the population of Enthusiasts increased, showing a commitment to the activity.

Cumulative Perspective (Rolling Trend): The rolling trend results show a slight decline in participation over the last six years, while Enthusiast levels have remained flat.



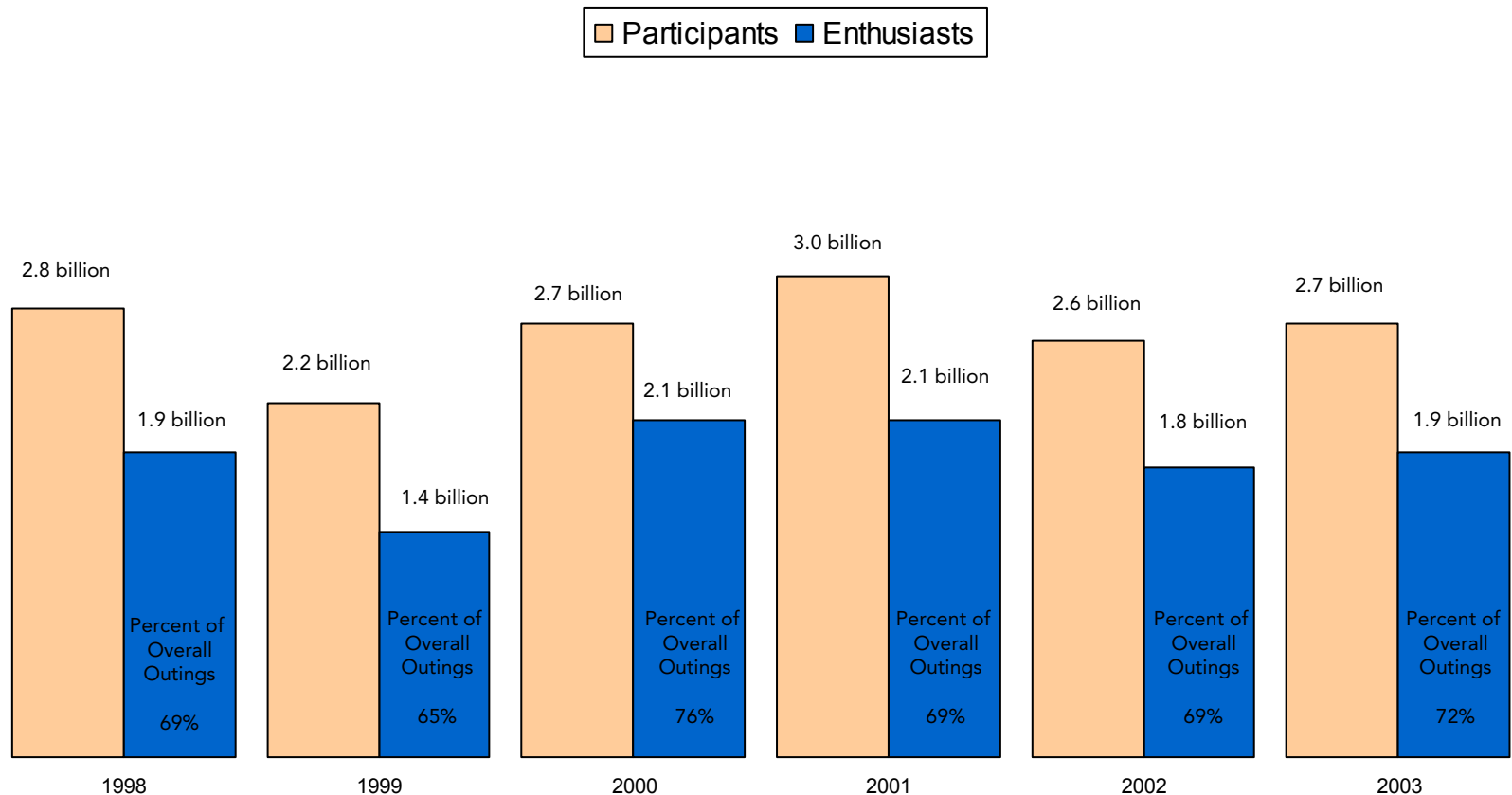
TOTAL NUMBER OF PAVED ROAD BICYCLING OUTINGS PER YEAR*

Americans 16 and older generated a total of 2.7 billion paved road bicycling outings during 2003 – a number of outings on par with historical results.

During 2003 Enthusiasts accounted for 1.9 billion paved road bicycling outings – nearly three-quarters (72%) of total paved road bicycling outings taken during the year.

Comparatively, 1999 experienced the fewest number of total paved road bicycling outings. The lower number of outings is the result of a fewer number of average outings taken in the year. For example, 29 outings was the average in 1999 compared to 34 in 2003.

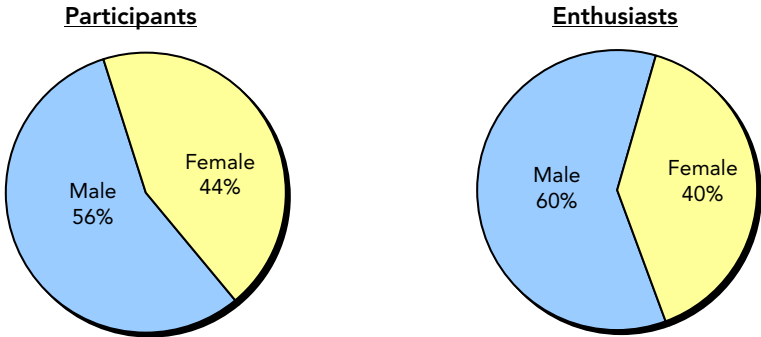
Bicycling – Paved Road Outings in Each Year



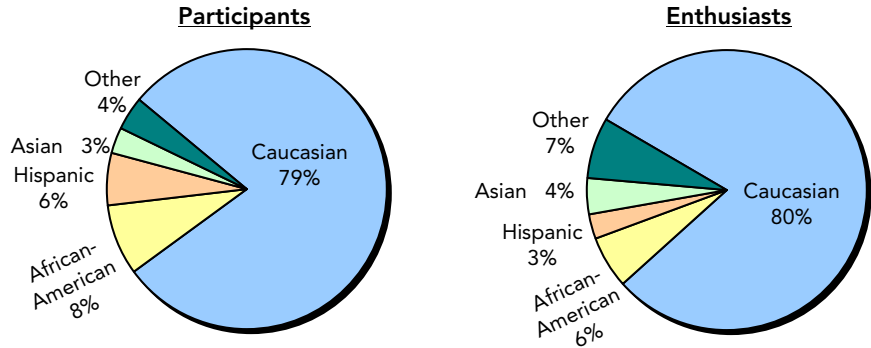
* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went paved road bicycling each year

PAVED ROAD BICYCLING DEMOGRAPHIC PROFILE

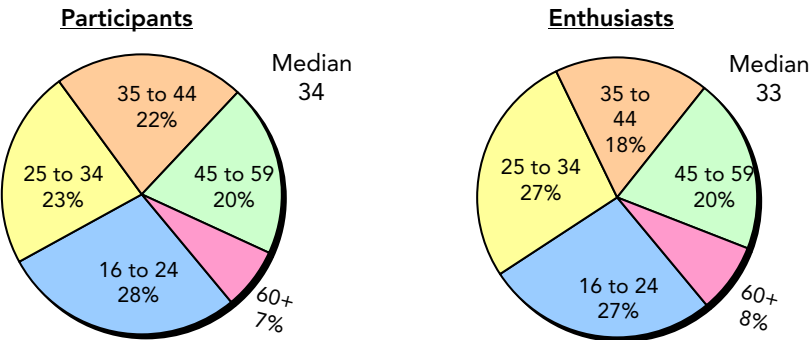
GENDER



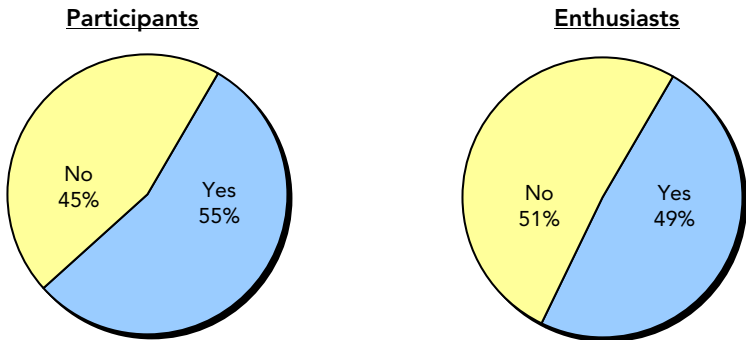
ETHNICITY



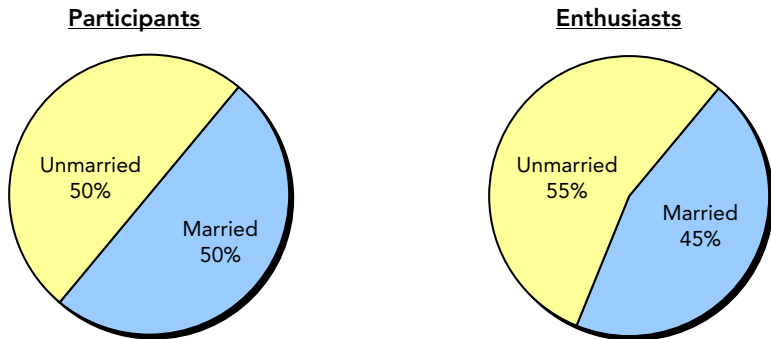
AGE



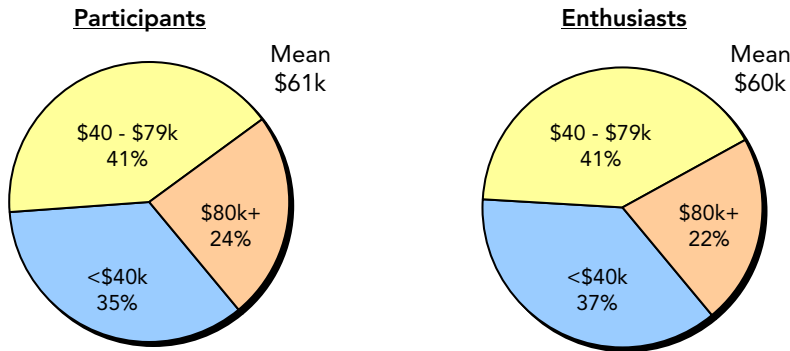
PRESENCE OF CHILDREN <18 in HOUSEHOLD



MARITAL STATUS



HOUSEHOLD INCOME



PAVED ROAD BICYCLING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- Paved road bicycling appeals to Americans of all types and the 2003 demographic profile reveals the broadbased popularity of the activity.
- The 2003 paved road bicycling population is relatively gender balanced – males (56%) and females (44%). The representation of females within the population is lower than in 1998.
- The age profile of 2003 Participants is very balanced across all age segments. The median age is 34 years.
- In 2003 an increasing percentage of Participants report the presence of children under the age of 18 in their household than in 2001 – indicating that the activity is popular among American families in 2003.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	50%	52%	54%	53%	56%	56%
Female	50%	48%	46%	47%	44%	44%
Age						
16 to 24	26%	23%	29%	29%	30%	28%
25 to 34	20%	22%	22%	24%	22%	23%
35 to 44	26%	26%	23%	22%	21%	22%
45+	28%	29%	26%	25%	27%	27%
Marital Status						
Married	52%	52%	50%	45%	49%	50%
Unmarried	48%	48%	50%	55%	51%	50%
Ethnicity						
Caucasian	82%	81%	80%	81%	79%	79%
African-American	9%	8%	9%	8%	10%	8%
Hispanic	5%	7%	7%	6%	7%	6%
Asian	3%	2%	2%	1%	2%	3%
Children <18						
Yes	51%	51%	53%	47%	49%	55%
Household Income						
<\$40k	NA	29%	36%	39%	34%	35%
\$40k - \$79k	NA	35%	43%	43%	40%	41%
\$80k+	NA	21%	21%	18%	26%	24%
Region						
Northeast	22%	17%	10%	19%	20%	19%
South Central	32%	34%	33%	31%	29%	32%
North Central	26%	25%	29%	25%	28%	25%
West	20%	24%	28%	25%	23%	24%

 = Significant difference from 2001

PAVED ROAD BICYCLING DEMOGRAPHIC PROFILE TRENDS OF ENTHUSIASTS

- In 2003, the majority of Enthusiast (60%) paved road bicyclists are male; a gender dynamic that has been constant over the past six years.
- Paved road bicycling benefits from the Enthusiast activity of Americans of all ages – nearly one-half are between the ages of 16 and 34 (54%) and 35 and older (46%). The median age of year 2003 Enthusiasts is 33 years.
- The Enthusiast population shows a slight decline in the ethnic diversity that has defined the population in recent years. The presence of African-Americans and Hispanics within the segment is down in 2003.
- Compared to 1998, year 2003 Enthusiasts are more likely to live in the West and less likely to live in the Northeast regions of the U.S.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	60%	64%	62%	61%	62%	60%
Female	40%	36%	38%	39%	38%	40%
Age						
16 to 24	23%	30%	29%	34%	32%	27%
25 to 34	25%	20%	22%	22%	20%	27%
35 to 44	21%	20%	23%	21%	20%	18%
45+	31%	31%	26%	23%	28%	28%
Marital Status						
Married	51%	41%	40%	36%	45%	45%
Unmarried	49%	59%	60%	64%	55%	55%
Ethnicity						
Caucasian	88%	85%	73%	79%	77%	80%
African-American	8%	4%	8%	8%	11%	6%
Hispanic	2%	6%	10%	7%	8%	3%
Asian	1%	2%	1%	1%	4%	4%
Children <18						
Yes	41%	44%	51%	41%	44%	49%
Household Income						
<\$40k	NA	31%	48%	38%	38%	37%
\$40k - \$79k	NA	32%	31%	37%	34%	41%
\$80k+	NA	22%	21%	25%	28%	22%
Region						
Northeast	26%	12%	10%	19%	16%	18%
South Central	31%	38%	35%	31%	34%	27%
North Central	26%	28%	18%	20%	26%	27%
West	17%	22%	37%	29%	25%	28%

PAVED ROAD BICYCLING CROSSOVER ACTIVITY

Unlike other activities with multiple formats, bicyclists participated at high levels in each of the different types of bicycling in 2003.

More than four in 10 paved road bicyclists also went dirt road (43.9% or 34.2 million Americans 16 and older) and single track (43.5% or 33.8 million) bicycling in 2003.

Nearly one-half (49.3%) of paved road bicyclists also went hiking during 2003.

Activities	Paved Road Bicyclists - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Bicycling - Paved Road	100.0%	77.8
Hiking	49.3%	38.4
Bicycling - Dirt Road	43.9%	34.2
Bicycling - Single Track	43.5%	33.8
Car Camping	33.5%	26.1
Trail Running	28.0%	21.8
Canoeing	15.5%	12.1
Camping (Away from Car)	10.5%	8.2
Backpacking	9.1%	7.1
Rafting	8.5%	6.6
Fly-Fishing	7.6%	5.9
Bird Watching	7.6%	5.9
Cross-Country/Nordic Skiing	7.3%	5.7
Kayaking - Recreation/St-on-Top	5.7%	4.4
Climbing - Artificial Wall	5.3%	4.1
Kayaking - Touring/Sea	5.2%	4.0
Snowshoeing	4.0%	3.1
Climbing - Natural Rock	3.2%	2.5
Telemark Skiing	3.1%	2.4
Kayaking - Whitewater	1.7%	1.3
Climbing - Ice	0.4%	0.319

SINGLE TRACK BICYCLING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:

Following a spike in involvement among Americans 16 and older in 2001, single track bicycling has shown recent declines in participation.

Short-term Perspective (Compared to 2002):

Compared to 2002, participation in single track bicycling declined in 2003 (-5.8%).

The percentage of Americans who rode on single track trails in 2003 at Enthusiast levels remained primarily stable with the population of Enthusiasts identified in 2002, 3% of Americans 16 and older.

Three-Year Perspective (Compared to 2001):

In 2003, participation in single track bicycling has declined sharply from the record high levels of participation reported in 2001.

Despite the decline in Participant levels, Enthusiast levels have remained primarily unchanged compared to 2001.

Long-term Perspective (Compared to 1998):

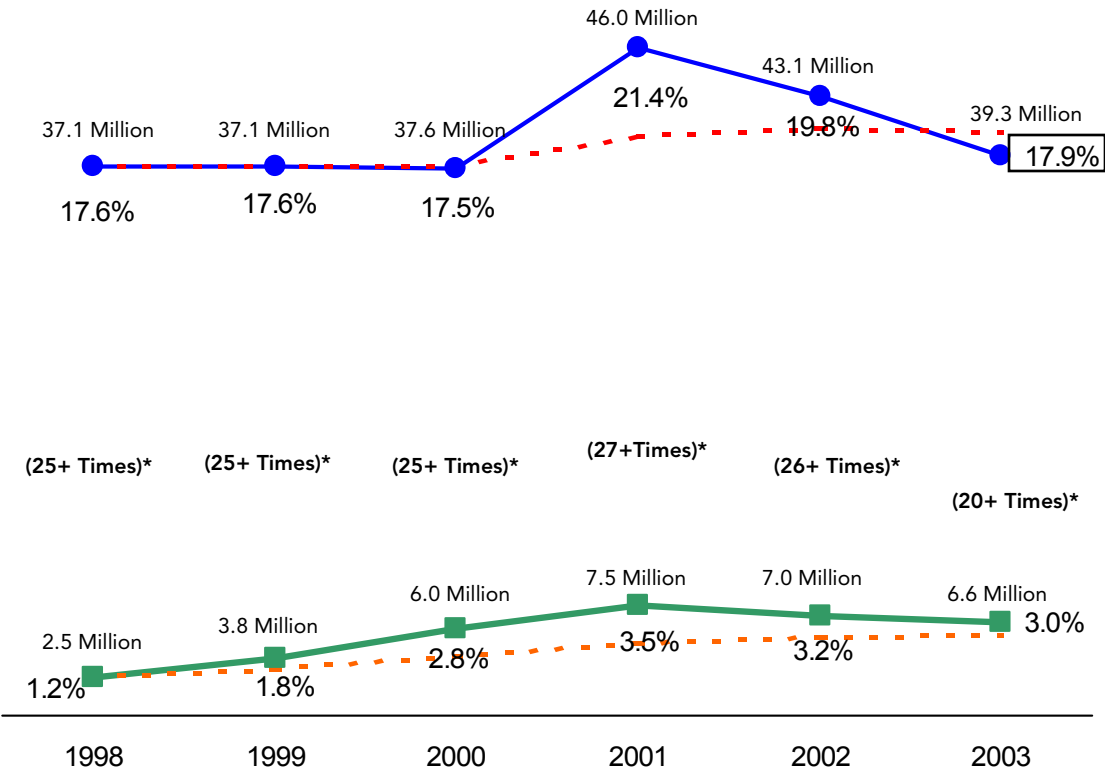
In 2003, the Participant level has returned to the incidence reported in 1998.

Commitment to the activity is questionable in that the population has grown, but the commitment to the frequency of single track riding has dropped.

Cumulative Perspective (Rolling Trend):

Driven by record high participation in 2001, rolling trend results show a slight increase in participation and Enthusiast levels over the last six years.

Participation in Single Track Bicycling
% of U.S. Population Age 16 and Older



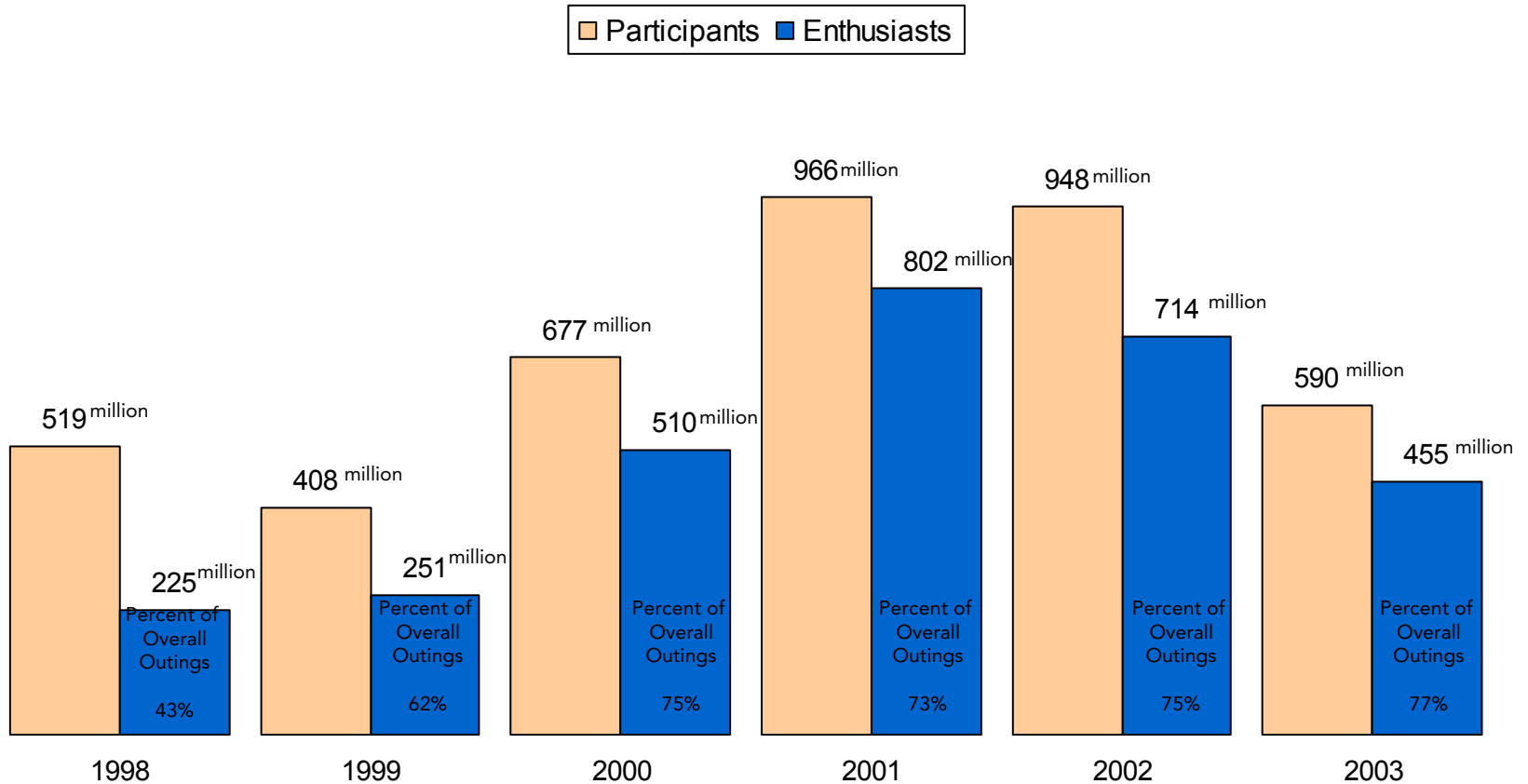
SINGLE TRACK BICYCLING TOTAL NUMBER OF OUTINGS PER YEAR*

During 2003, Americans 16 and older generated a total of 590 million single track bicycling outings – down from the record number of outings reported in 2001 (966 million) and 2002 (848 million). The lower number of outings in 2003 is the result the decline in participation and average number of outings taken during the year.

During 2003 Enthusiasts accounted for 455 million single track bicycling outings (77% of total outings).

Compared to the late 1990's, Enthusiasts since 2000 have contributed a greater share of outings to the overall total single track bicycling occasions in each year.

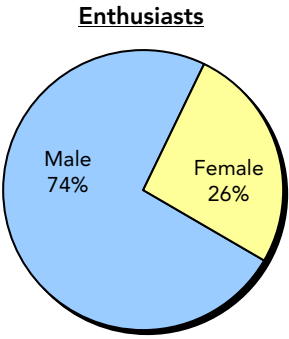
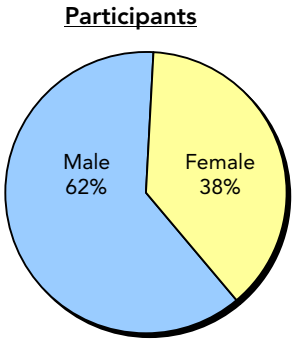
Bicycling – Single Track Outings in Each Year



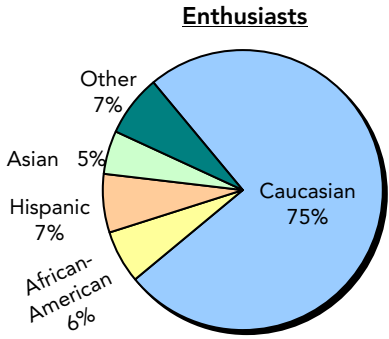
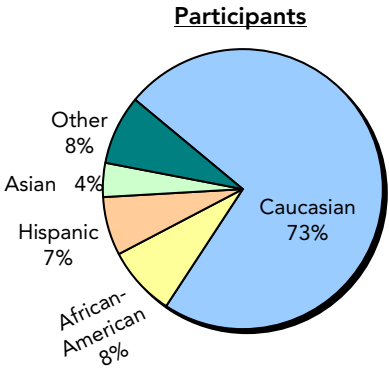
*Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went single track bicycling each year

SINGLE TRACK BICYCLING DEMOGRAPHIC PROFILE

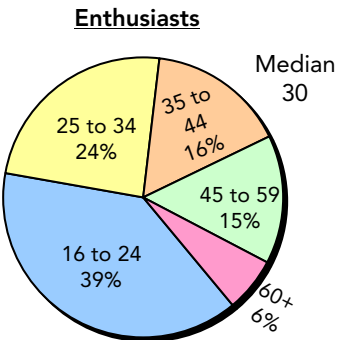
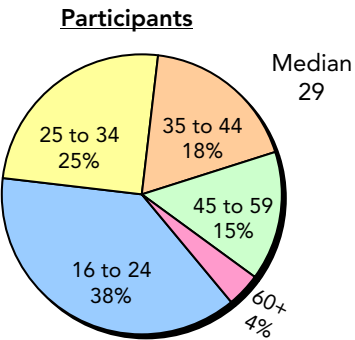
GENDER



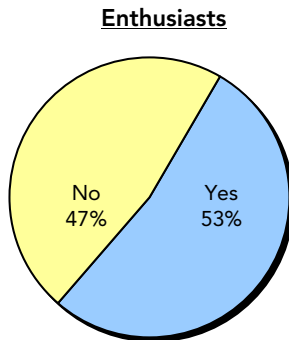
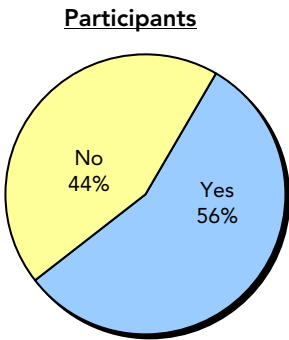
ETHNICITY



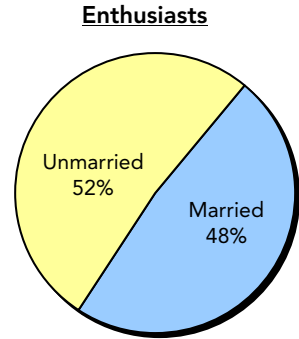
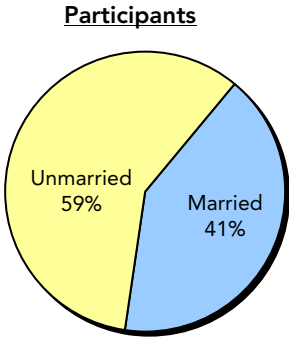
AGE



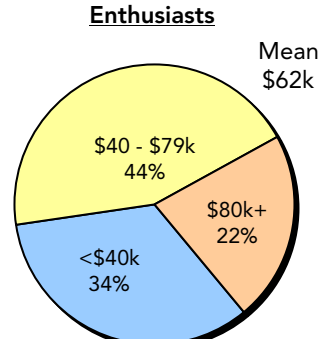
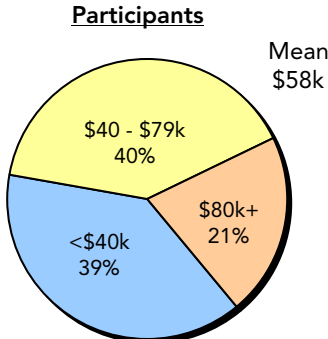
PRESENCE OF CHILDREN <18 in HOUSEHOLD



MARITAL STATUS



HOUSEHOLD INCOME



SINGLE TRACK BICYCLING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- The majority (62%) of year 2003 single track bicyclists are male – a strong gender skew that has been present since 1999.
- Young Americans comprise the majority of the year 2003 single track bicycling population. Nearly two-thirds (63%) of Participants are between the ages of 16 and 34. The median age of Americans who participated in single track bicycling in 2003 is 29.
- The majority (56%) of year 2003 Participants report the presence of children 18 years of age and younger in their household – an incidence higher than reported in 2001 (47%).

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	53%	61%	62%	58%	61%	62%
Female	47%	39%	38%	42%	39%	38%
Age						
16 to 24	39%	33%	40%	35%	37%	38%
25 to 34	22%	24%	25%	26%	24%	25%
35 to 44	19%	21%	18%	20%	18%	18%
45+	20%	22%	18%	19%	21%	19%
Marital Status						
Married	39%	44%	42%	40%	43%	41%
Unmarried	61%	56%	58%	60%	57%	59%
Ethnicity						
Caucasian	83%	77%	78%	76%	76%	73%
African-American	7%	9%	8%	9%	10%	8%
Hispanic	7%	8%	8%	9%	9%	7%
Asian	2%	2%	2%	2%	3%	4%
Children <18						
Yes	48%	51%	55%	46%	50%	56%
Household Income						
<\$40k	NA	28%	36%	39%	37%	39%
\$40k - \$79k	NA	37%	43%	44%	40%	40%
\$80k+	NA	19%	21%	17%	23%	21%
Region						
Northeast	22%	18%	10%	20%	20%	19%
South Central	33%	32%	32%	30%	31%	32%
North Central	22%	22%	28%	22%	24%	22%
West	22%	28%	30%	29%	25%	27%

SINGLE TRACK BICYCLING DEMOGRAPHIC PROFILE TRENDS OF ENTHUSIASTS

- In 2003, Americans who went single track bicycling 20 or more times are more likely to be male (74%) by nearly a three-fold margin. The representation of males within the population is higher in 2003 than in 1998.
- Younger Americans make up the majority of the Enthusiast population in 2003; nearly two-thirds (63%) are between the ages of 16 and 34.
- Compared to the 2002 population, year 2003 Enthusiasts are less likely to be of Caucasian ethnicity – a diversity that is driven in part by greater representation of Hispanics (7%).

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	58%	71%	66%	69%	73%	74%
Female	42%	29%	34%	31%	27%	26%
Age						
16 to 24	43%	29%	31%	31%	36%	39%
25 to 34	20%	25%	21%	31%	27%	24%
35 to 44	17%	22%	29%	22%	16%	16%
45+	20%	23%	19%	17%	21%	21%
Marital Status						
Married	33%	47%	50%	37%	41%	48%
Unmarried	67%	53%	50%	63%	59%	52%
Ethnicity						
Caucasian	80%	79%	76%	77%	85%	75%
African-American	12%	7%	6%	8%	7%	6%
Hispanic	4%	8%	9%	10%	4%	7%
Asian	4%	2%	2%	1%	1%	5%
Children <18						
Yes	46%	46%	59%	40%	45%	53%
Household Income						
<\$40k	NA	25%	34%	38%	36%	34%
\$40k - \$79k	NA	39%	48%	42%	43%	44%
\$80k+	NA	22%	19%	20%	21%	22%
Region						
Northeast	37%	26%	4%	21%	20%	22%
South Central	22%	29%	24%	28%	29%	28%
North Central	30%	26%	34%	20%	23%	26%
West	11%	20%	38%	32%	28%	25%

SINGLE TRACK BICYCLING CROSSOVER ACTIVITY

The clear majority of year 2003 single track bicyclists also devoted time and effort to other bicycling formats during the year.

Nearly all (86.1% or 33.8 million) single track Participants also went paved road bicycling in 2003 and nearly three-quarters (70.5% or 27.7 million) went dirt road bicycling during the year.

The majority (57.7%) of Participants went hiking in 2003.

Activities	Single Track Bicyclists - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Bicycling - Single Track	100.0%	39.3
Bicycling - Paved Road	86.1%	33.8
Bicycling - Dirt Road	70.5%	27.7
Hiking	57.7%	22.7
Trail Running	38.9%	15.3
Car Camping	35.3%	13.9
Canoeing	18.4%	7.2
Camping (Away from Car)	16.7%	6.6
Backpacking	13.9%	5.4
Fly-Fishing	11.6%	4.6
Rafting	9.6%	3.8
Cross-Country/Nordic Skiing	9.1%	3.6
Bird Watching	8.9%	3.5
Climbing - Artificial Wall	7.8%	3.1
Kayaking - Touring/Sea	7.3%	2.9
Kayaking - Recreation/St-on-Top	7.2%	2.8
Climbing - Natural Rock	6.2%	2.4
Showshoeing	4.8%	1.9
Telemark Skiing	3.6%	1.4
Kayaking - Whitewater	3.0%	1.2
Climbing - Ice	1.1%	0.432

DIRT ROAD BICYCLING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:

Following a spike in involvement among Americans 16 and older in 2001, participation in dirt road bicycling has fallen back to historical levels.

Short-term Perspective (Compared to 2002):

In 2003, participation in dirt road bicycling remained on par with last year

The percentage of Americans who bicycled on dirt roads in 2003 at Enthusiast levels (20 or more times) is also on par with the levels measured in 2002; 3% or 6.6 million Enthusiasts.

Three-Year Perspective (Compared to 2001):

In 2003, participation in dirt road bicycling has declined from the record high levels of participation reported in 2001.

Despite the decline in Participant levels, Enthusiast levels have remained primarily unchanged from 2001.

Long-term Perspective (Compared to 1998):

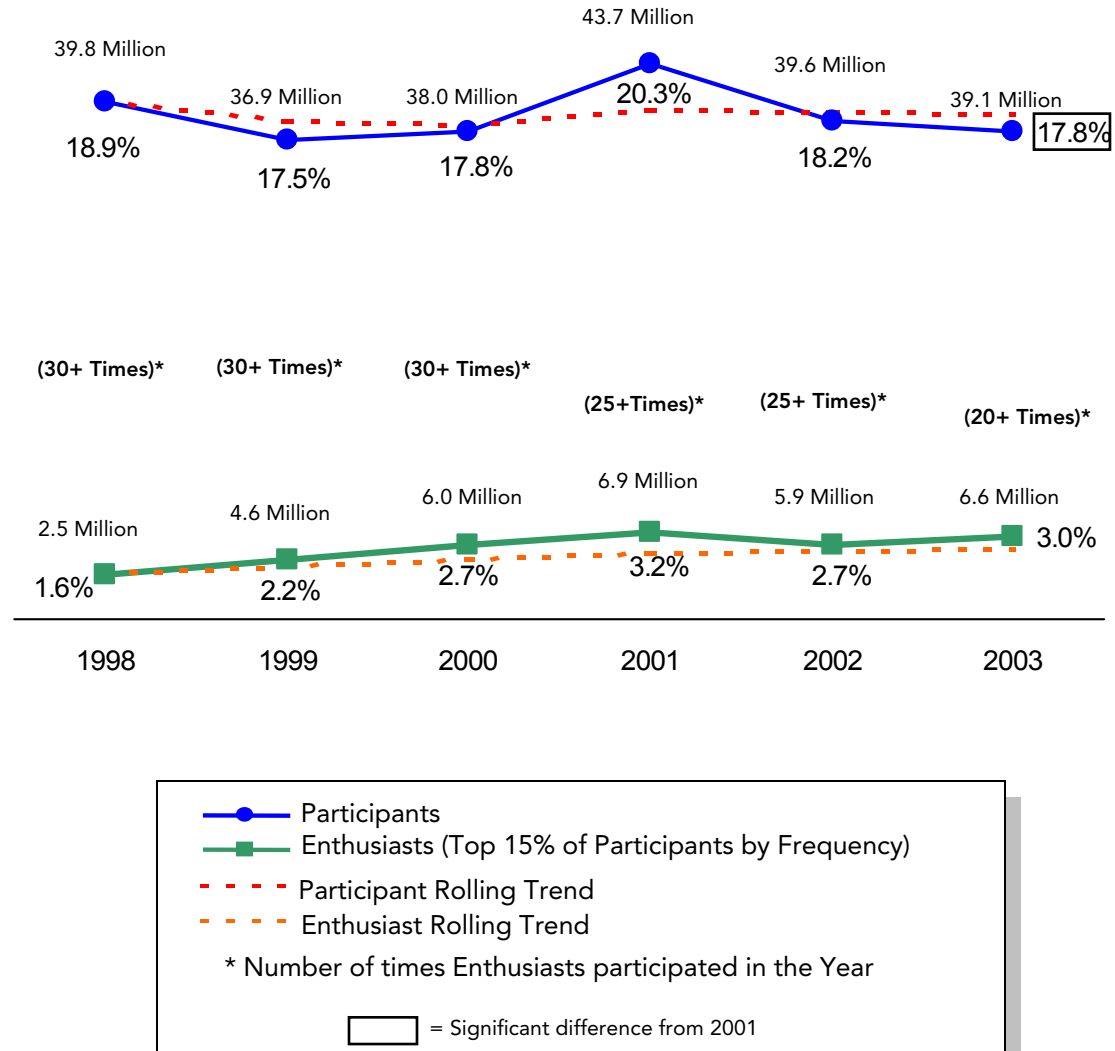
In 2003, the Participant level is aligned with the incidence reported in 1998.

Enthusiast populations are up from six years ago showing there are more participants committed to the activity than in the past. However, the drop in frequency depicts a picture of possible decline.

Cumulative Perspective (Rolling Trend):

Rolling trend results show a Participant level that has remained primarily flat over the last six years and a moderate increase in Enthusiasts.

Participation in Dirt Road Bicycling
% of U.S. Population Age 16 and Older

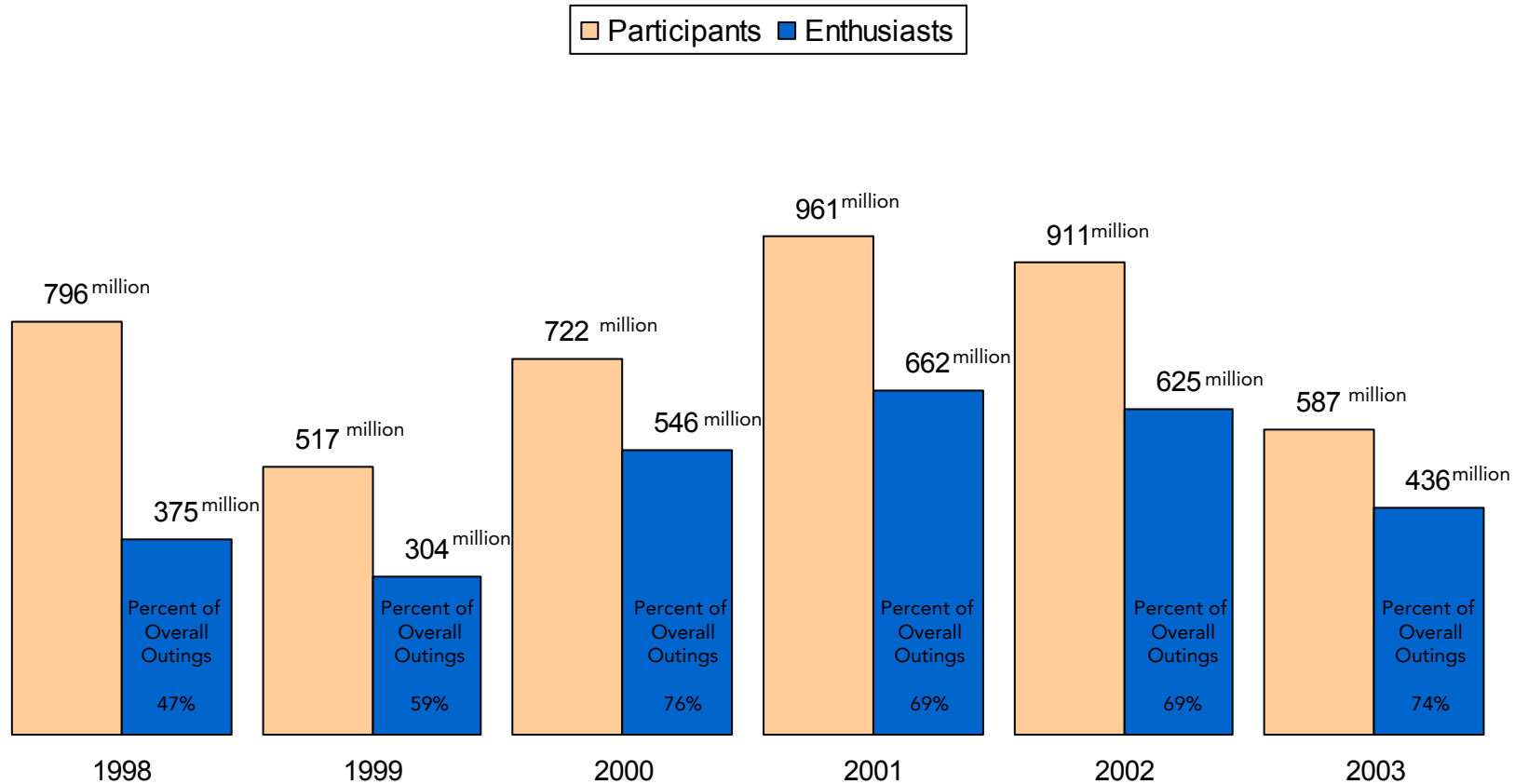


DIRT ROAD BICYCLING TOTAL NUMBER OF OUTINGS PER YEAR*

Americans 16 and older generated a total of 587 million dirt road bicycling outings during 2003. The total number of outings among Americans 16 and older in 2003 is down from recent years, primarily because the average number of outings each Participant took during the year has declined from above 20 to 15.

During 2003 Enthusiasts accounted for 436 million dirt road bicycling outings – three-quarters (74%) of total outings taken during the year.

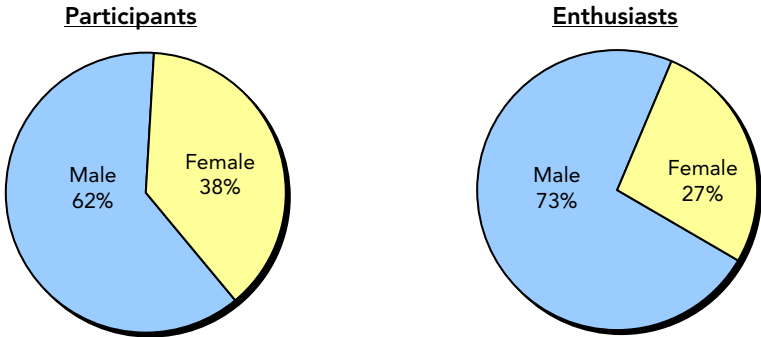
Bicycling – Dirt Road Outings in Each Year



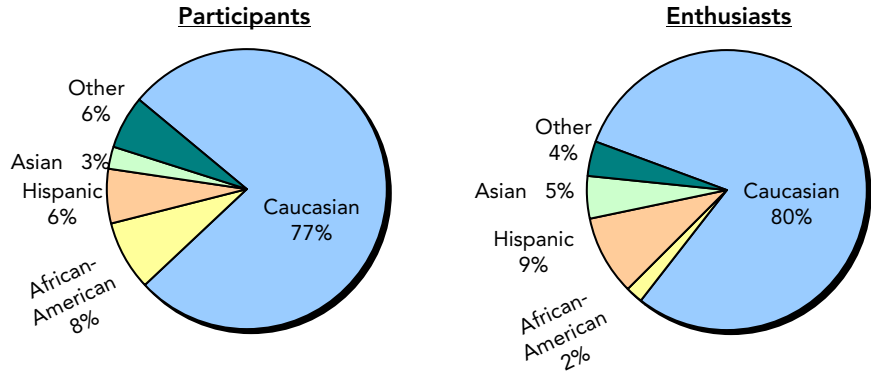
* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went dirt road bicycling each year

DIRT ROAD BICYCLING DEMOGRAPHIC PROFILE IN YEAR 2003

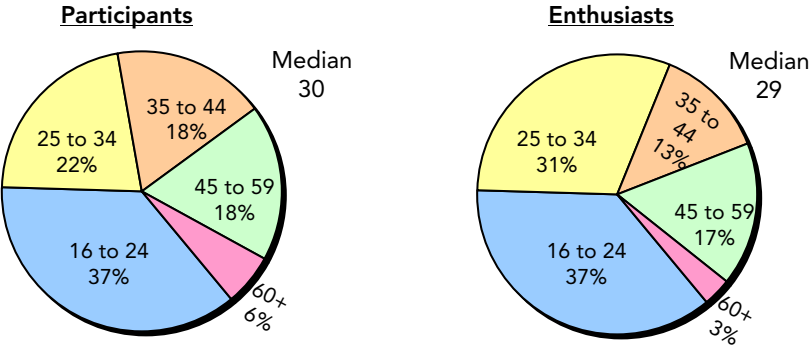
GENDER



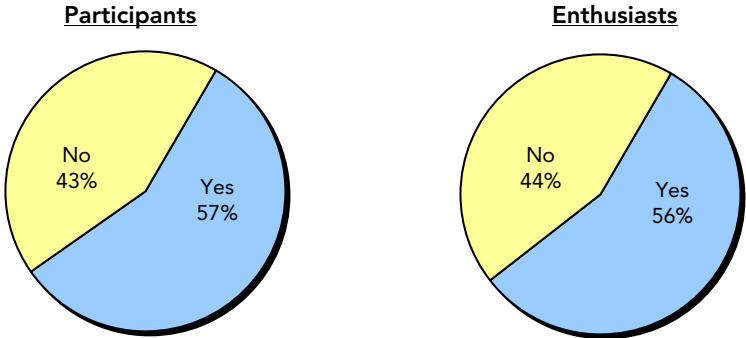
ETHNICITY



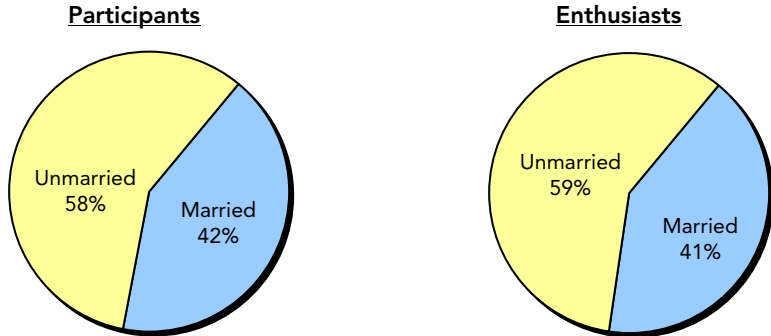
AGE



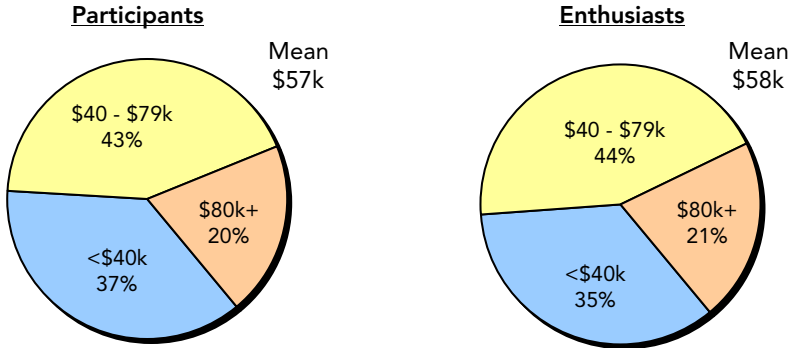
PRESENCE OF CHILDREN <18 in HOUSEHOLD



MARITAL STATUS



HOUSEHOLD INCOME



DIRT ROAD BICYCLING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- Similar to 2002, the 2003 Participant population is comprised of a strong majority of males (62%). The representation of males is higher in 2003 than in 1998.
- In 2003 dirt road biking participation is generated primarily by younger Americans – more than one-half (59%) are between the ages of 16 and 34. The median age of the year 2003 Participant population is 30.
- Three-quarters (77%) of dirt road Participants in 2003 are Caucasian, but African-Americans (8%) and Hispanics (6%) are continually represented within the population.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	53%	61%	58%	56%	62%	62%
Female	47%	39%	42%	44%	38%	38%
Age						
16 to 24	37%	31%	38%	37%	36%	37%
25 to 34	18%	22%	25%	24%	22%	22%
35 to 44	23%	24%	19%	20%	20%	18%
45+	22%	23%	19%	19%	22%	24%
Marital Status						
Married	44%	44%	50%	39%	46%	42%
Unmarried	46%	46%	50%	61%	54%	58%
Ethnicity						
Caucasian	83%	79%	79%	78%	78%	77%
African-American	7%	8%	9%	8%	10%	8%
Hispanic	7%	8%	7%	8%	8%	6%
Asian	2%	2%	2%	1%	3%	3%
Children <18						
Yes	52%	52%	56%	48%	52%	57%
Household Income						
<\$40k	NA	29%	36%	41%	36%	37%
\$40k - \$79k	NA	36%	43%	43%	41%	43%
\$80k+	NA	20%	21%	16%	23%	20%
Region						
Northeast	24%	18%	10%	21%	19%	19%
South Central	32%	33%	30%	29%	29%	33%
North Central	23%	22%	30%	22%	27%	23%
West	21%	28%	30%	28%	26%	25%

DIRT ROAD BICYCLING DEMOGRAPHIC PROFILE TRENDS OF ENTHUSIASTS

- Over the past six years the dirt road Enthusiast population has progressively become more male-oriented and in 2003 males comprise nearly three-quarters (73%) of the segment.
- Dirt road bicycling has broadbased appeal among Americans of all ages, particularly among 16 to 24 year olds who make up more than one-third (37%) of the year 2003 population.
- Although the clear majority (80%) of dirt road bicyclists are Caucasian, Hispanics make up 9% of the Enthusiast population.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	51%	68%	61%	67%	69%	73%
Female	49%	32%	39%	33%	31%	27%
Age						
16 to 24	39%	37%	40%	33%	36%	37%
25 to 34	22%	24%	18%	24%	26%	31%
35 to 44	23%	25%	16%	24%	14%	13%
45+	16%	14%	25%	19%	24%	20%
Marital Status						
Married	42%	44%	40%	43%	47%	41%
Unmarried	58%	56%	60%	57%	53%	59%
Ethnicity						
Caucasian	86%	83%	75%	76%	82%	80%
African-American	4%	6%	3%	7%	7%	2%
Hispanic	6%	7%	10%	10%	7%	9%
Asians	3%	2%	2%	*	3%	5%
Children <18						
Yes	51%	54%	57%	46%	54%	56%
Household Income						
<\$40k	NA	26%	40%	34%	33%	35%
\$40k - \$79k	NA	38%	40%	42%	43%	44%
\$80k+	NA	20%	20%	24%	24%	21%
Region						
Northeast	28%	13%	9%	22%	19%	21%
South Central	22%	34%	33%	24%	34%	28%
North Central	22%	19%	23%	22%	22%	23%
West	28%	34%	35%	33%	24%	28%

DIRT ROAD BICYCLING CROSSOVER ACTIVITY

Year 2003 dirt road bicyclists were particularly active in other types of bicycling during the year.

Nearly all (87.3% or 34.2 million) dirt road Participants also went paved road bicycling in 2003 and nearly three-quarters (70.8% or 27.7 million) went single track bicycling during the year.

The majority (57.3%) of Participants also spent time hiking trails in 2003.

Activities	Dirt Road Bicyclists - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Bicycling - Dirt Road	100.0%	39.1
Bicycling - Paved Road	87.3%	34.2
Bicycling - Single Track	70.8%	27.7
Hiking	57.3%	22.4
Trail Running	37.1%	14.5
Car Camping	36.4%	14.2
Canoeing	19.4%	7.6
Camping (Away from Car)	16.6%	6.5
Backpacking	14.3%	5.6
Fly-Fishing	11.1%	4.3
Rafting	10.3%	4.0
Cross-Country/Nordic Skiing	9.7%	3.8
Bird Watching	9.5%	3.7
Kayaking - Touring/Sea	7.1%	2.8
Climbing - Artificial Wall	6.8%	2.7
Kayaking - Recreation/St-on-Top	6.3%	2.5
Showshoeing	5.8%	2.3
Climbing - Natural Rock	5.0%	2.0
Telemark Skiing	3.1%	1.2
Kayaking - Whitewater	2.1%	0.821
Climbing - Ice	0.8%	0.313

BICYCLING REGIONAL PROFILE IN YEAR 2003

Bicycling Participants are geographically balanced across the U.S. in year 2003, with slightly greater percentages tending to live in the South region of the U.S.

Enthusiast bicyclists also live in all regions of the U.S., but in general are *least* likely to live in the Northeast.

North Central

Paved Road Biking Participants 25%

Single Track Bikers Participants 22%

Dirt Road Bikers Participants 23%

Paved Road Biking Enthusiasts 27%

Single Track Bikers Enthusiasts 26%

Dirt Road Bikers Enthusiasts 23%

Northeast

Paved Road Biking Participants 19%

Single Track Bikers Participants 19%

Dirt Road Bikers Participants 19%

Paved Road Biking Enthusiasts 18%

Single Track Bikers Enthusiasts 22%

Dirt Road Bikers Enthusiasts 21%

West

Paved Road Biking Participants 24%

Single Track Bikers Participants 27%

Dirt Road Bikers Participants 25%

Paved Road Biking Enthusiasts 28%

Single Track Bikers Enthusiasts 25%

Dirt Road Bikers Enthusiasts 28%

South

Paved Road Biking Participants 32%

Single Track Bikers Participants 32%

Dirt Road Bikers Participants 33%

Paved Road Biking Enthusiasts 27%

Single Track Bikers Enthusiasts 28%

Dirt Road Bikers Enthusiasts 28%

OUTDOOR RECREATION PARTICIPATION STUDY

BIRD WATCHING

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

BIRD WATCHING

Headlines

- In 2003, **16 million** Americans went bird watching at least once, a decline in Participant from 2002 and 2001
- The size of the bird watching Enthusiast population in 2003 remains unchanged from 2002 and 2001, **2.5 million** Americans 16 and older
- The majority of year 2003 bird watching Participants and Enthusiasts are male – reversing the female majority populations of 2002
- Bird watching is participated in by Americans of all ages but the core of the activity population in 2003 is 45 years of age or older.
- Participants generated a total of 336 million bird watching outings in 2003; 273 million outings were sourced by Enthusiasts.

The average number of times that Participants went bird watching in 2003 is 21.

During the year, the majority (80%) of Participants went bird watching less than the average number of times (one to 20 outings) and more than one in 10 (12%) went bird watching more than average (22 or more times). Nearly one-quarter (23%) of Participants went bird watching only one time in 2003

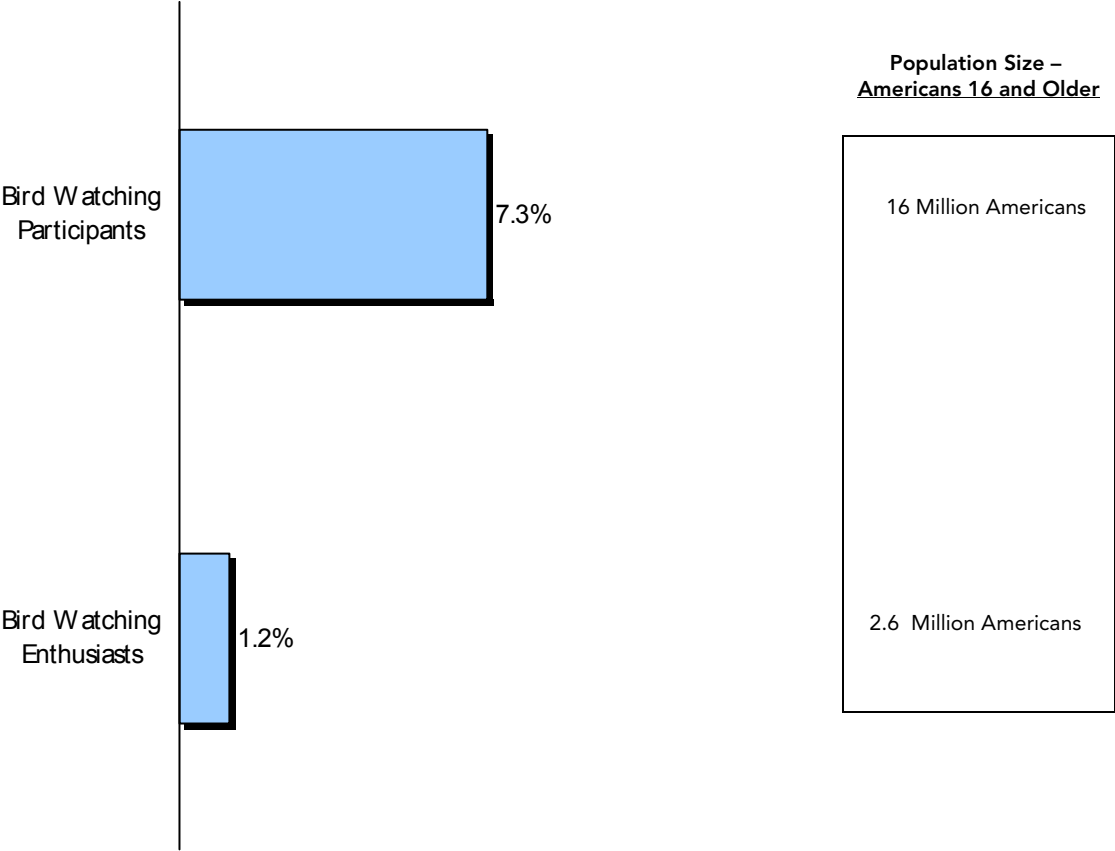
- The states that comprise the South region of the U.S. are the areas in which year 2003 bird watchers are most likely to live
- Not surprisingly, an activity that might be considered part of the bird watching process, hiking, was a crossover activity in which the majority of birders took part.

BIRD WATCHING PARTICIPANT & ENTHUSIAST LEVELS IN 2003

Participation in Bird watching
% of U.S. Population Age 16 and Older

During 2003 16 million Americans went on a bird watching excursion of more than one-quarter of a mile from their home.

Bird watching Enthusiasts – Americans who went on 20 or more excursions during 2003 – total a population of nearly 3 million bird watchers or 1.2% of the American population 16 and older.



BIRD WATCHING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:

Following two years of stability, recent participation in bird watching declined.

Short-term Perspective (Compared to 2002):

In 2003, bird watching Participant levels dropped significantly – a decline of 13.1% to a population of 16.0 million Americans 16 and older.

Despite a decline in the number of Americans 16 and older participating in bird watching, year 2003 Enthusiast levels remained consistent with the previous year.

Three-Year Perspective (Compared to 2001):

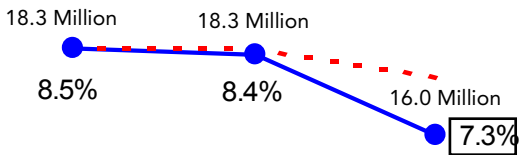
Participation in bird watching is significantly lower in 2003 than in 2001, but Enthusiast levels have remained primarily unchanged.

Cumulative Perspective (Rolling Trend):

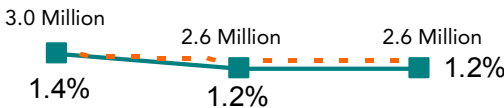
Rolling trend results show a Participant level that has declined slightly over the last three years.

Rolling trend Enthusiast levels have remained unchanged.

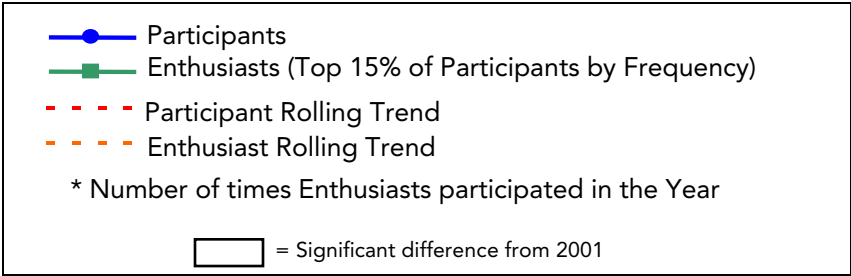
Participation in Bird Watching
% of U.S. Population Age 16 and Older



(20+Times)* (26+ Times)* (20+ Times)*



1998 1999 2000 2001 2002 2003



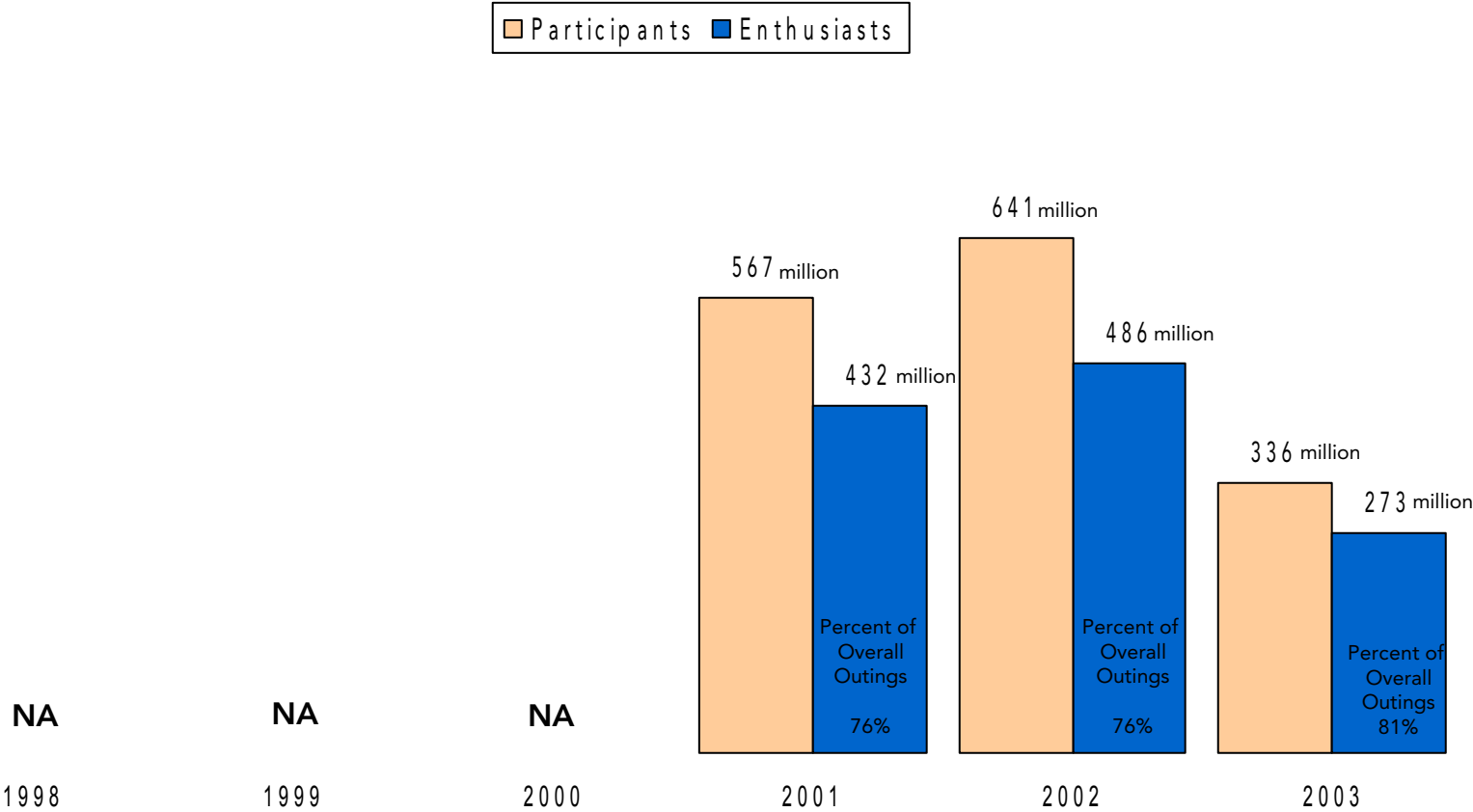
BIRD WATCHING TOTAL NUMBER OF OUTINGS PER YEAR*

Americans 16 and older generated a total of 336 million bird watching outings during 2003.

During 2003, Enthusiasts accounted for 273 million bird watching outings – more than three-quarters (81%) of total bird watching outings taken during the year. The number of Enthusiasts outings consistently have been more than a third of total participant outings.

The decline in the number of bird watching outings in 2003 is the result of a smaller population of Participants than in previous years and a decline in the number of average outings.

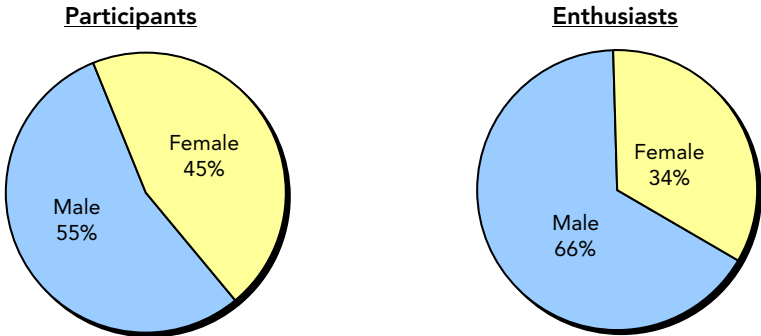
Bird Watching Outings in Each Year



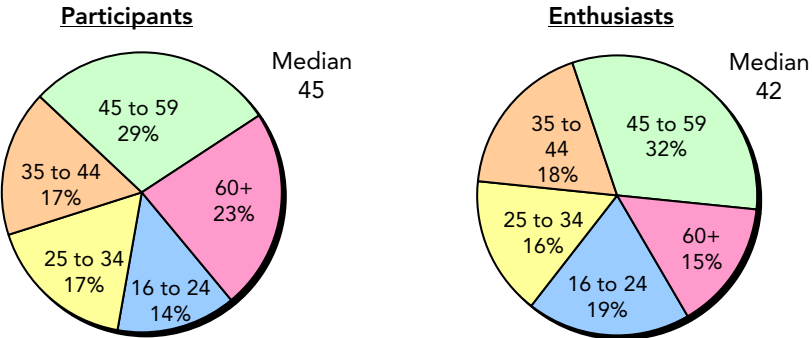
Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went bird watching each year

BIRD WATCHING DEMOGRAPHIC PROFILE

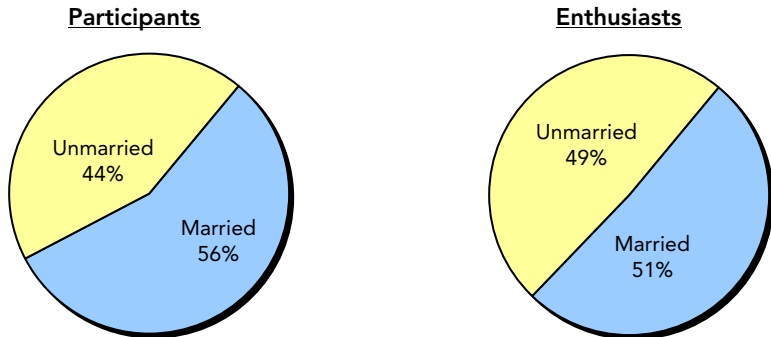
GENDER



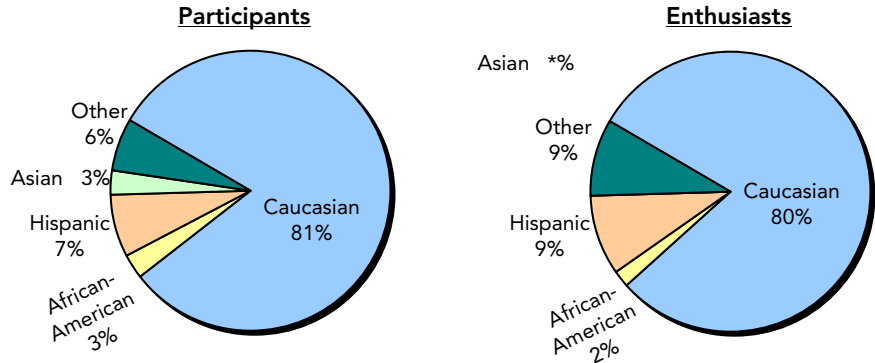
AGE



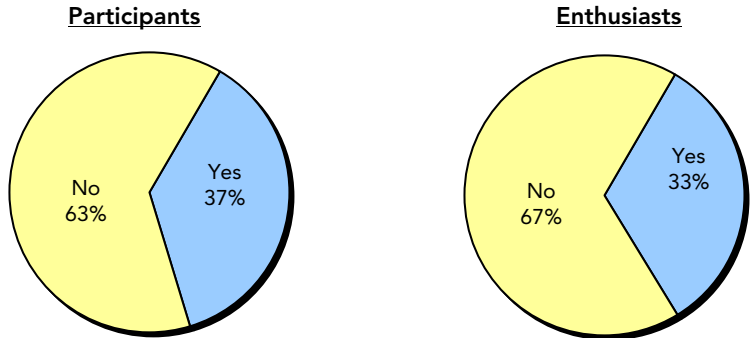
MARITAL STATUS



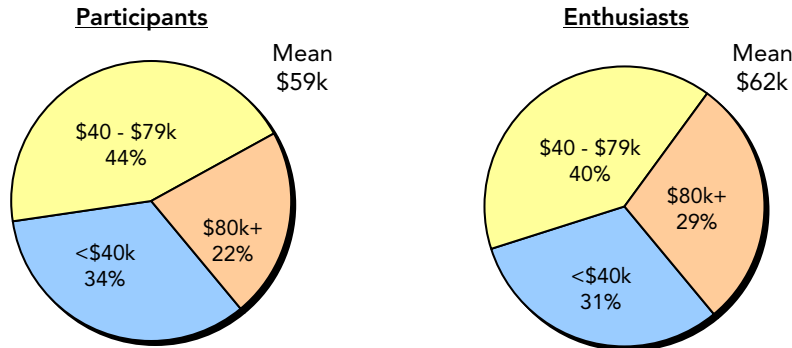
ETHNICITY



PRESENCE OF CHILDREN <18 in HOUSEHOLD



HOUSEHOLD INCOME



* = Less than 1%

BIRD WATCHING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- The year 2003 bird watching Participant population is relatively gender balanced, but skews slightly male (55%) – an inverse of the gender composition of the 2002 population.
- In 2003 bird watching attracted the oldest Participant group - median age of 45. However, the activity does draw Americans of younger ages as well. Nearly one-third (31%) of bird watching Participants are between the ages of 16 and 34.
- In 2003 the representation of Hispanics among Participants increased significantly – equaling 7% of the Participant population.
- As a group, year 2003 bird watchers are slightly more affluent than Americans who participated in the activity in 2001 - \$59,000 mean income in 2003 compared to \$54,000 in 2001.

<u>Dimension</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>
<u>Gender</u>						
Male	NA	NA	NA	50%	47%	55%
Female	NA	NA	NA	50%	53%	45%
<u>Age</u>						
16 to 24	NA	NA	NA	15%	14%	14%
25 to 34	NA	NA	NA	16%	16%	17%
35 to 44	NA	NA	NA	23%	16%	17%
45+	NA	NA	NA	46%	54%	52%
<u>Marital Status</u>						
Married	NA	NA	NA	52%	54%	56%
Unmarried	NA	NA	NA	48%	46%	44%
<u>Ethnicity</u>						
Caucasian	NA	NA	NA	82%	85%	81%
African-American	NA	NA	NA	5%	8%	3%
Hispanic	NA	NA	NA	5%	2%	7%
Asian	NA	NA	NA	2%	3%	3%
<u>Children <18</u>						
Yes	NA	NA	NA	34%	29%	37%
<u>Household Income</u>						
<\$40k	NA	NA	NA	42%	43%	34%
\$40k - \$79k	NA	NA	NA	40%	37%	44%
\$80k+	NA	NA	NA	18%	21%	22%
<u>Region</u>						
Northeast	NA	NA	NA	22%	19%	18%
South Central	NA	NA	NA	27%	36%	32%
North Central	NA	NA	NA	26%	24%	28%
West	NA	NA	NA	26%	22%	22%

BIRD WATCHING DEMOGRAPHIC PROFILE TRENDS OF ENTHUSIASTS

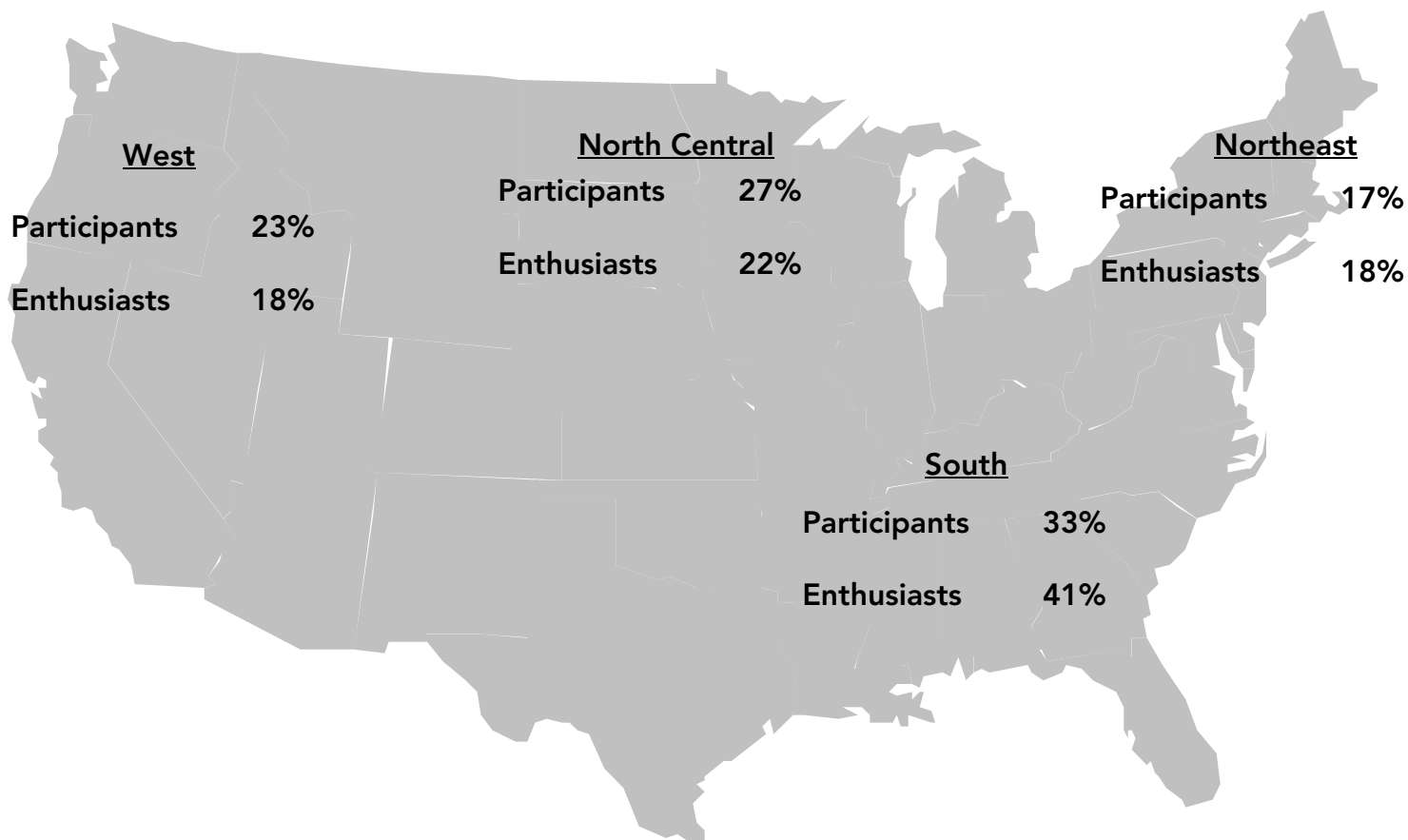
- In 2003, the bird watching Enthusiast population is comprised of a greater percentage of males (66%) than females (34%). This is a reversal of the majority female Enthusiast population in 2002.
- The bird watching Enthusiast population is among the oldest of the human powered activities tracked - nearly one half (47%) of Participants are 45 and older and the median age is 42. Yet, the year 2003 population is significantly younger than in 2001 when the median age was 65.
- Although in 2003 bird watchers are primarily Caucasian (88%), the representation of Hispanics (9%) is stronger than in 2001.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	NA	NA	NA	54%	44%	66%
Female	NA	NA	NA	46%	56%	34%
Age						
16 to 24	NA	NA	NA	9%	8%	19%
25 to 34	NA	NA	NA	11%	17%	16%
35 to 44	NA	NA	NA	25%	10%	18%
45+	NA	NA	NA	55%	65%	47%
Marital Status						
Married	NA	NA	NA	47%	63%	51%
Unmarried	NA	NA	NA	53%	37%	49%
Ethnicity						
Caucasian	NA	NA	NA	88%	84%	80%
African-American	NA	NA	NA	4%	5%	2%
Hispanic	NA	NA	NA	0%	2%	9%
Asian	NA	NA	NA	2%	1%	*
Children <18						
Yes	NA	NA	NA	27%	21%	33%
Household Income						
<\$40k	NA	NA	NA	47%	47%	31%
\$40k - \$79k	NA	NA	NA	33%	37%	40%
\$80k+	NA	NA	NA	20%	16%	29%
Region						
Northeast	NA	NA	NA	15%	10%	18%
South Central	NA	NA	NA	36%	35%	41%
North Central	NA	NA	NA	15%	27%	22%
West	NA	NA	NA	34%	27%	18%

 = Significant difference from 2001

BIRD WATCHING REGIONAL PROFILE IN YEAR 2003

Americans engaged in bird watching during 2003 are most likely to live in the South region of the U.S. One-third (33%) of Participants and four in 10 (41%) Enthusiasts live in the south.



BIRD WATCHING CROSSOVER ACTIVITY IN YEAR 2003

The majority of Americans who went bird watching in 2003 also participated in an activity that can be an integral part of the bird watching process – 60.2% or nearly 10 million bird watchers went hiking.

Participation in other human powered activities is modest among year 2003 bird watchers and reflects interest in less strenuous activities that is most likely driven by the older age profile of the population. Paved road bicycling (36.5%) and car camping (32.3%) are activities that bird watchers participated in at secondary levels in 2003.

Activities	Single Track Bicyclists - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Bicycling - Single Track	100.0%	39.3
Bicycling - Paved Road	86.1%	33.8
Bicycling - Dirt Road	70.5%	27.7
Hiking	57.7%	22.7
Trail Running	38.9%	15.3
Car Camping	35.3%	13.9
Canoeing	18.4%	7.2
Camping (Away from Car)	16.7%	6.6
Backpacking	13.9%	5.4
Fly-Fishing	11.6%	4.6
Rafting	9.6%	3.8
Cross-Country/Nordic Skiing	9.1%	3.6
Bird Watching	8.9%	3.5
Climbing - Artificial Wall	7.8%	3.1
Kayaking - Touring/Sea	7.3%	2.9
Kayaking - Recreation/St-on-Top	7.2%	2.8
Climbing - Natural Rock	6.2%	2.4
Showshoeing	4.8%	1.9
Telemark Skiing	3.6%	1.4
Kayaking - Whitewater	3.0%	1.2
Climbing - Ice	1.1%	0.432

OUTDOOR RECREATION PARTICIPATION STUDY

CAMPING

"Have you camped out at least one-quarter of a mile from where you parked your vehicle?"

"Have you camped less than one-quarter of a mile from your vehicle?"

CAMPING

Headlines

- Generating impressive populations of Participants (**69 million**) and Enthusiasts (**10.8 million**), overall camping surged in 2003
- Car camping Enthusiasts are most likely to live in the West; the most active campers (away from car) tend to live in the South
- Crossover participation in the different camping types is marginal – Participants develop a preference and remain loyal to that activity
- In 2003, Participants generated a total of 83 million camping (away from car) outings; 41 million outings were sourced by Enthusiasts.

The average number of times that Participants went camping (away from car) in 2003 is five.

Nearly three-quarters (73%) of Participants went camping (away from car) less than the average number of times and more than one in 10 (14%) went camping (away from car) more than average. Nearly one-quarter (24%) of Participants went camping (away from car) only one time in 2003

- Car camping Participant and Enthusiast activity in 2003 surged up from 2002 levels – 53 million Participants and 8.6 million Enthusiasts
- Car camping activity in 2003 is a family affair – nearly three-quarters of Participants went car camping with a family relation
- Participants generated a total of 318 million car camping outings in 2003; 198 million outings were sourced by Enthusiasts

Participants went car camping an average of six times.

Over three-quarters (79%) of Participants went car camping less than the average number of times. More than one in 10 (14%) went car camping more than average. 29.6% of Participants went car camping only one time in 2003

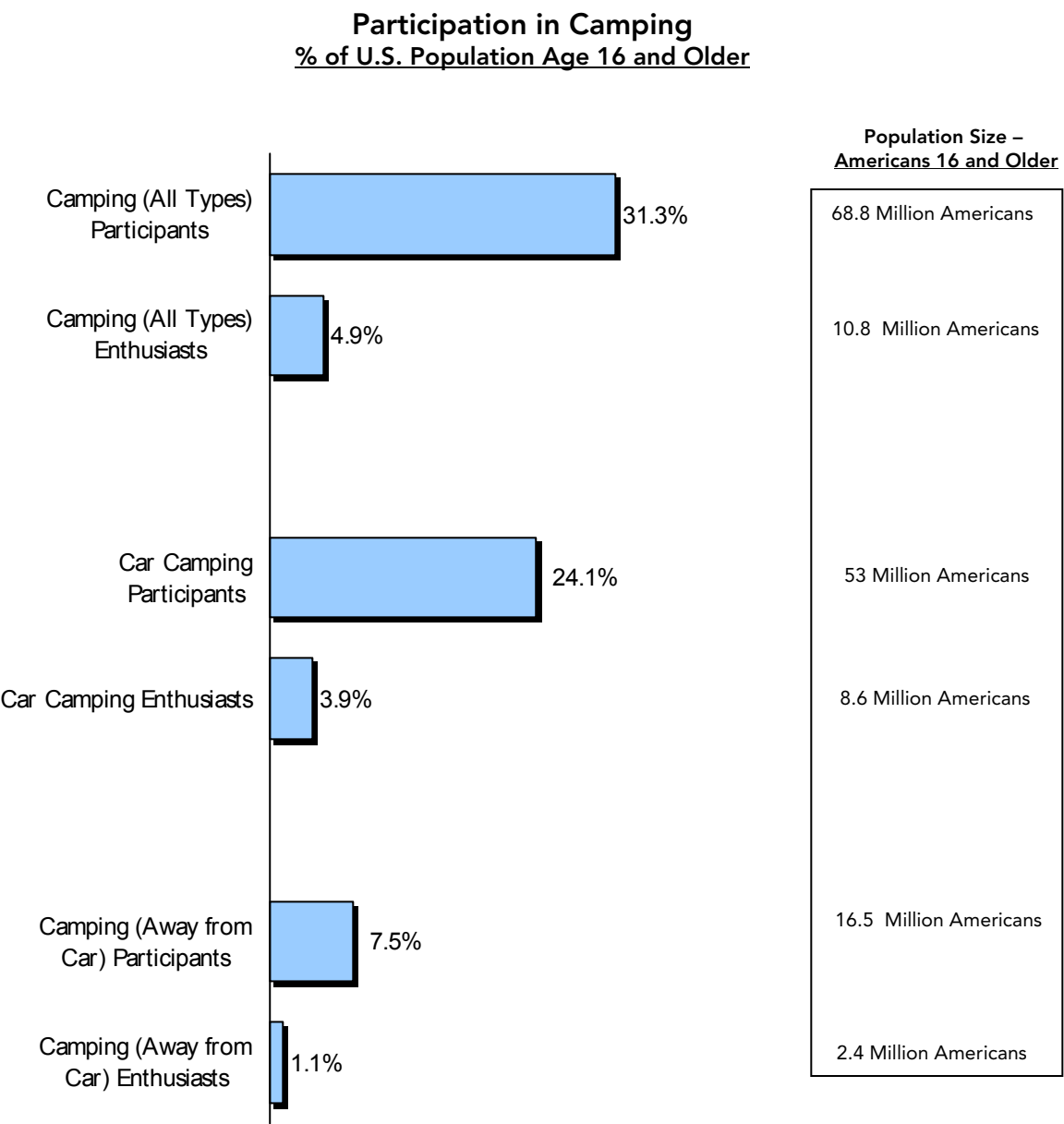
CAMPING PARTICIPANT & ENTHUSIAST LEVELS IN YEAR 2003

Nearly one-third (31.3%) of all Americans 16 and older went camping in 2003 – either where they parked their vehicle or more than one-quarter of a mile from their car. Participant activity yields a population of 68.8 million campers 16 and older.

Based on camping activity that includes seven or more outings during 2003, nearly 11 million Americans 16 and older are classified as camping Enthusiasts.

Among Americans 16 and older, car camping enjoys broader participation than camping away from the car. Nearly one-quarter (24.1%) of Americans, or 53 million, camped near their car in 2003. The car camping Enthusiast population (7 or more times) numbers 8.6 million.

Participation in camping that takes place more than one-quarter of a mile from the car is more limited. Nearly 17 million Americans participated in the activity in 2003 and Enthusiast activity (7 or more times) is reported by 2.4 million Americans 16 and older during 2003.



CAR CAMPING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:
Although well-below the stand-out year of 1998, car camping show signs of stability and retains it's important Enthusiast population.

Short-term Perspective (Compared to 2002):
In 2003, Participant activity jumped nearly 8% from the previous year revealing 53.0 million car campers for the year.

In 2003, Enthusiast participation in car camping (seven or more times) reflects an increase of 30%

Three-Year Perspective (Compared to 2001):
Year 2003 Participation and Enthusiast populations are on par with the levels reported in 2001.

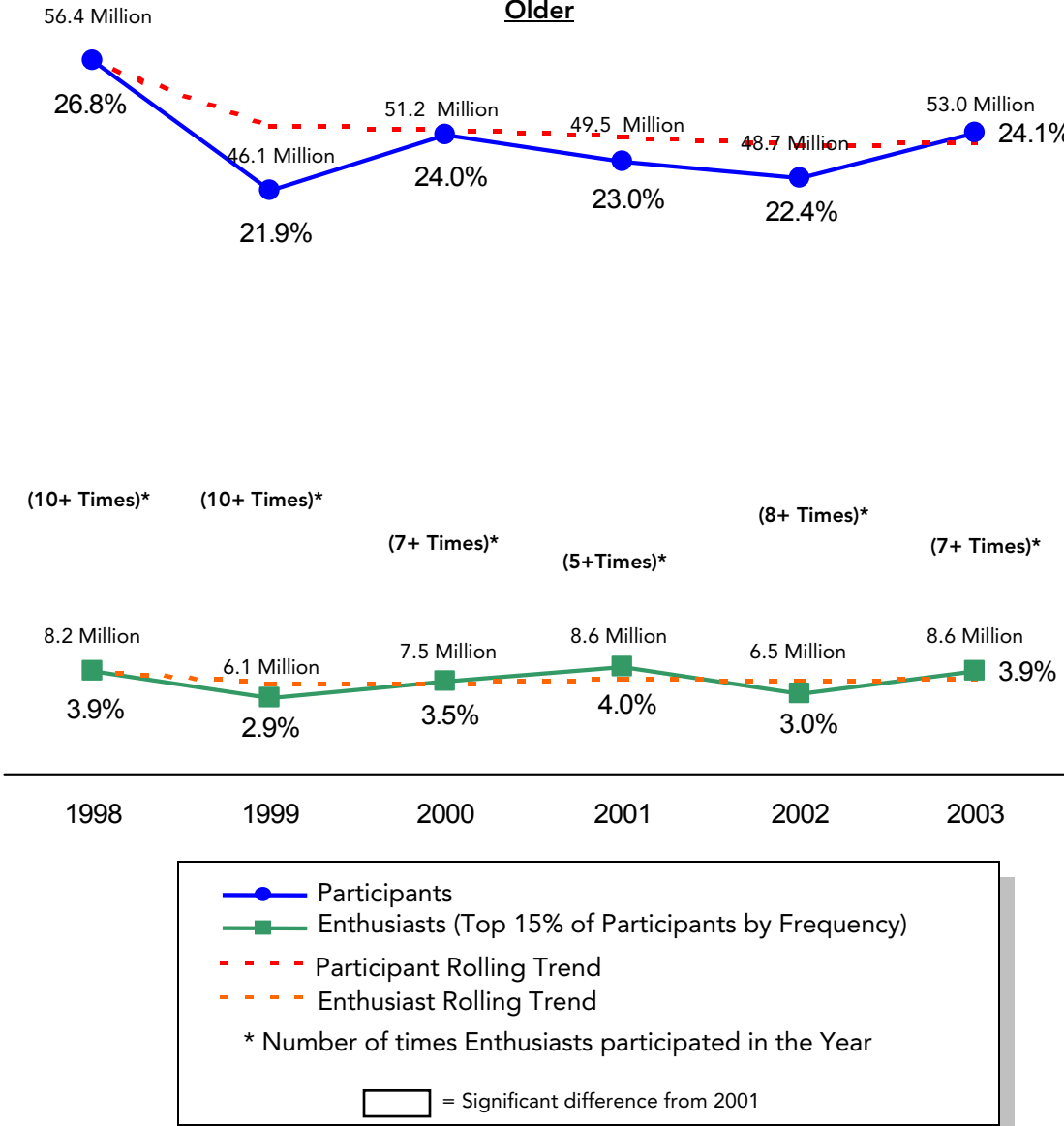
The frequency in which Enthusiasts go car camping has increased along with the population size, revealing true growth in this activity.

Long-term Perspective (Compared to 1998):
Despite a surge in car camping participation in 2003, the Participant level is lower than reported in the record year of 1998. Enthusiast levels are on par with 1998.

Cumulative Perspective (Rolling Trend):
Rolling trend results show a gradual decline in Participant levels, a result strongly influenced by 1998's result.

Rolling trend Enthusiast levels have remained primarily stable over the past six years.

Participation in Car Camping
% of U.S. Population Age 16 and Older

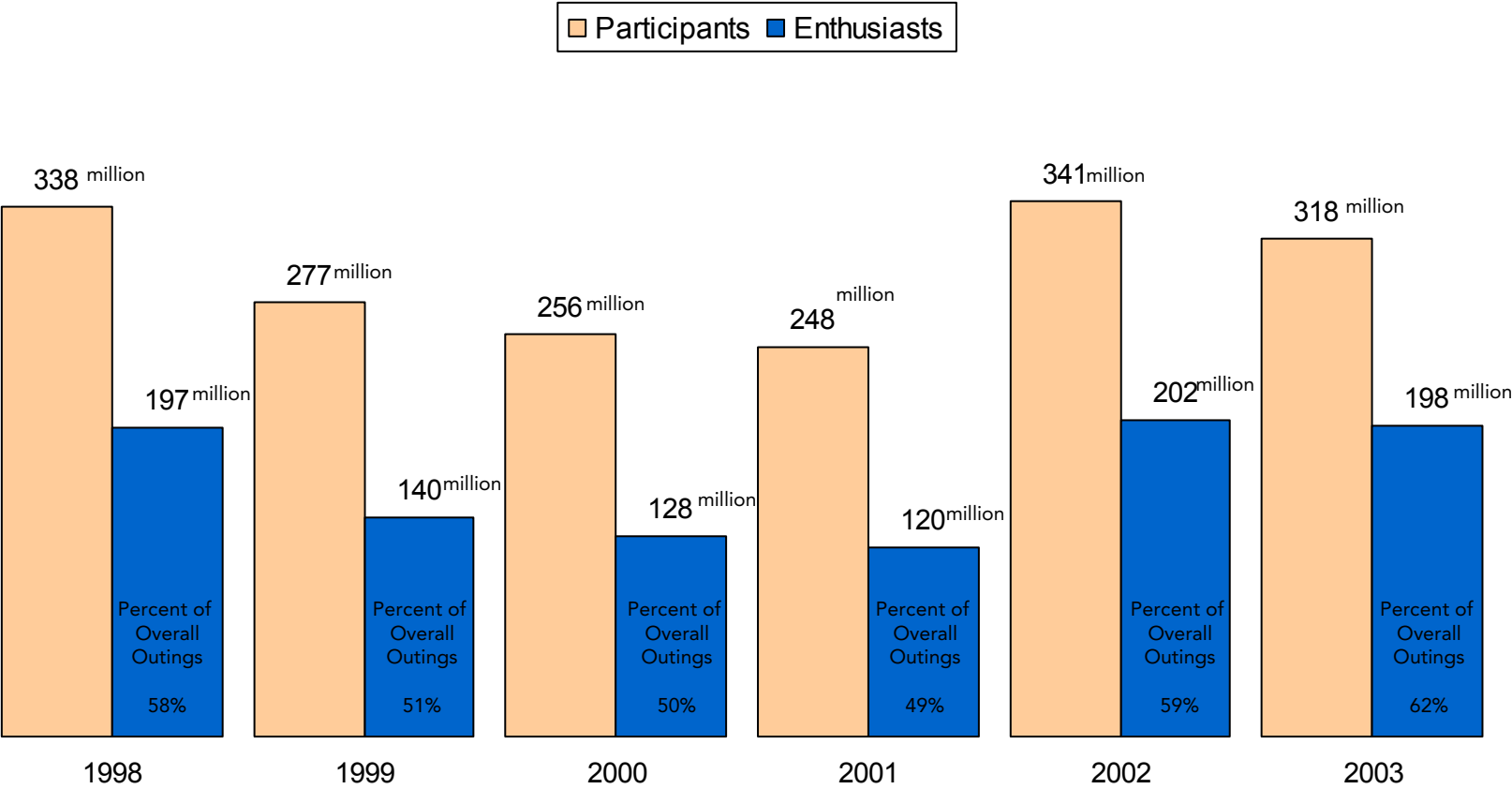


CAR CAMPING TOTAL NUMBER OF OUTINGS PER YEAR*

Americans 16 and older generated a total of 318 million car camping outings during 2003 – a number of outings that trails only 2002 (341 million outings) and 1998 (338 million) over the past six years.

During 2003 Enthusiasts accounted for nearly 200 million outings, or nearly two-thirds (62%) of total car camping outings.

Car Camping Outings in Each Year



* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went car camping each year

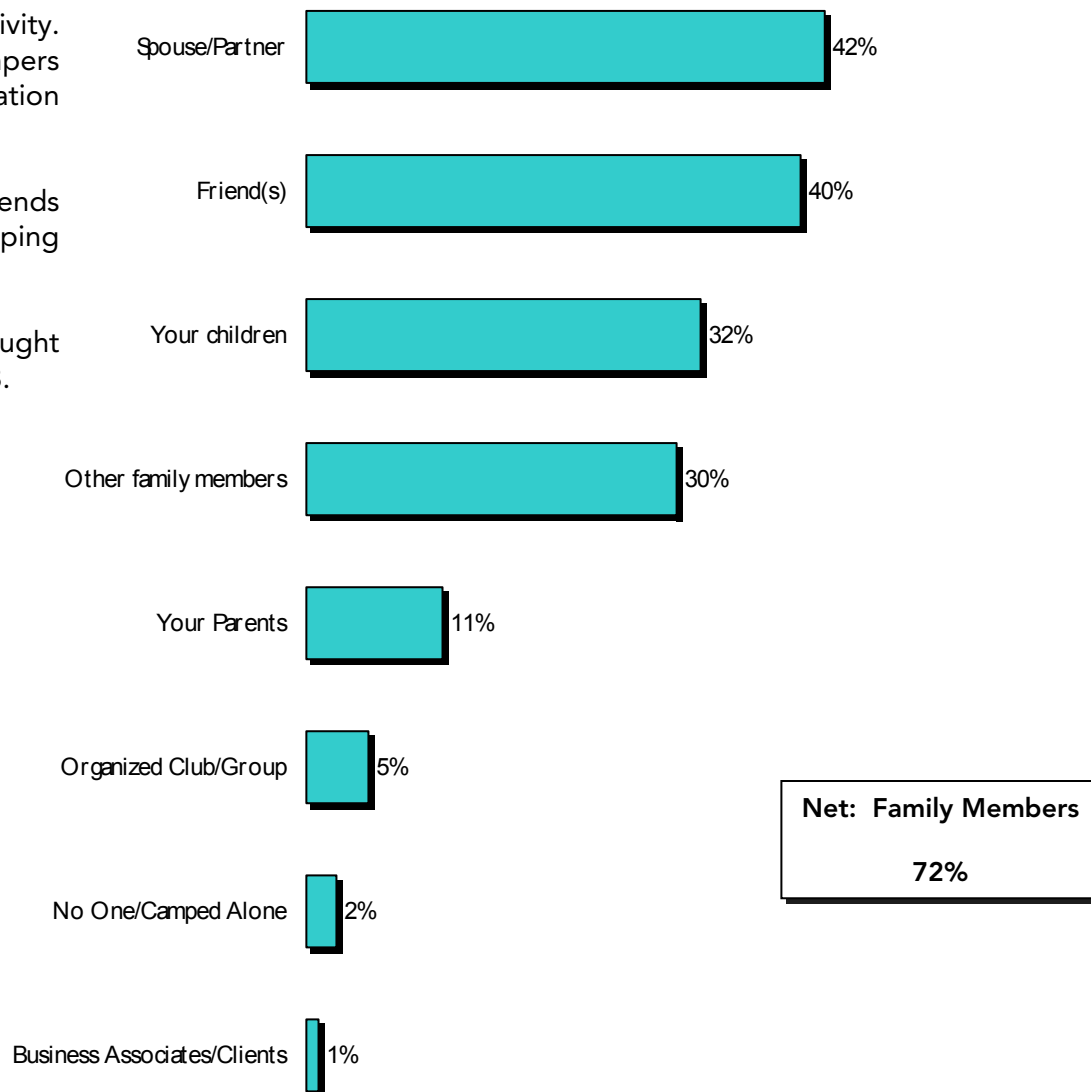
CAR CAMPING

"Who do you usually camp with when you camp where you parked your car?"

Car camping in 2003 is truly a family activity. Nearly three-quarters (72%) of car campers participated in the activity with a family relation in 2003.

Specifically, spouses/partners (42%) and friends (40%) are the most common car camping companions in 2003.

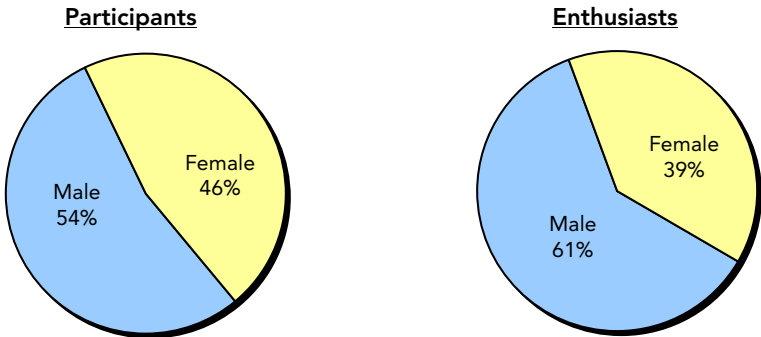
Nearly one-third (32%) of car campers brought their children with them on an outing in 2003.



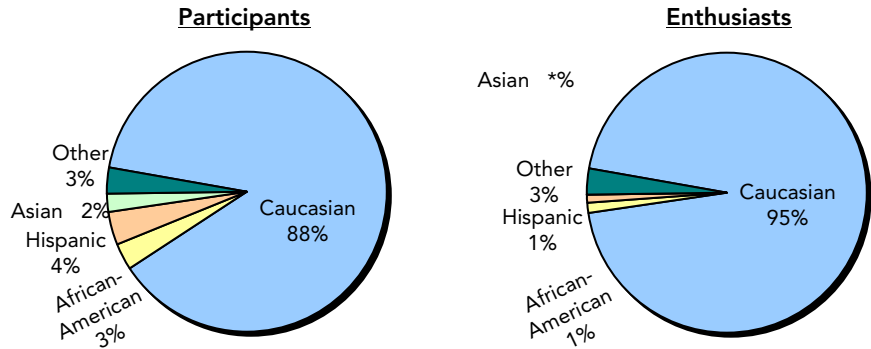
* Percentages based to Americans who car camped (24.1%).

CAR CAMPING DEMOGRAPHIC PROFILE

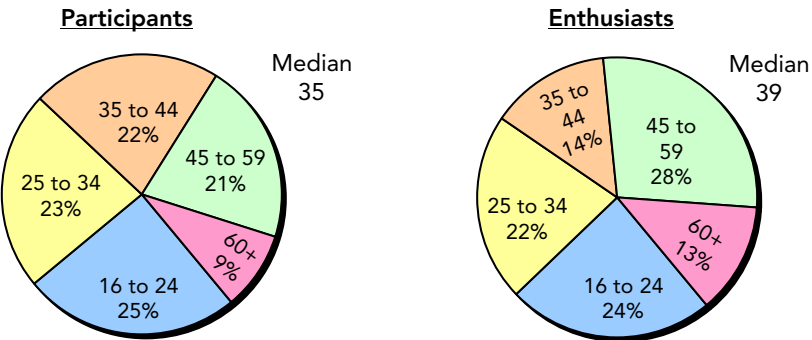
GENDER



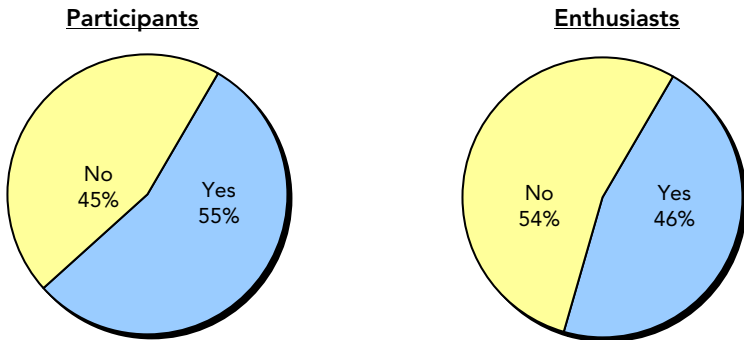
ETHNICITY



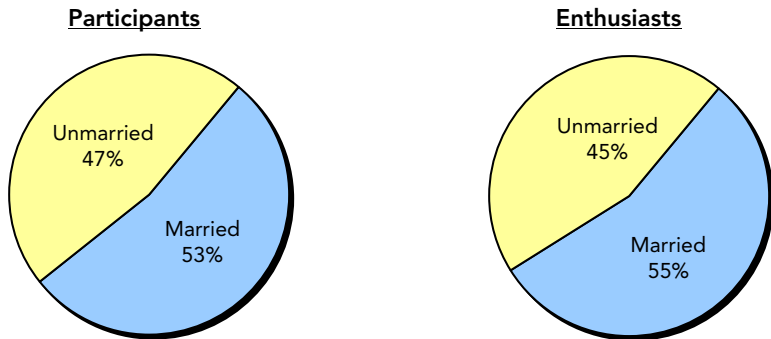
AGE



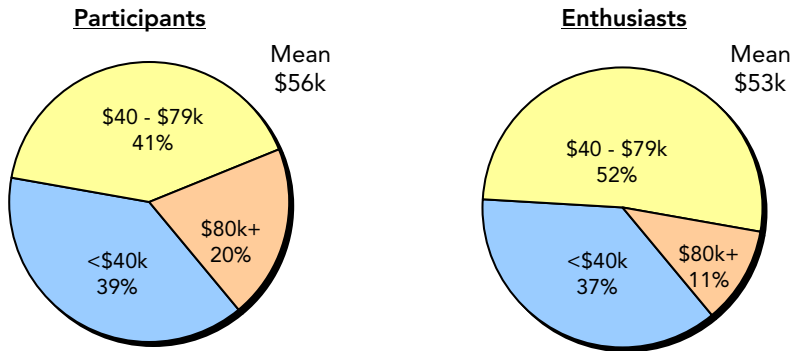
PRESENCE OF CHILDREN <18 in HOUSEHOLD



MARITAL STATUS



HOUSEHOLD INCOME



* = Less than 1%

CAR CAMPING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- The demographic profile of car campers in 2003 continues to reflect a remarkably diverse, yet unchanging, Participant population.
- The Participant population is relatively balanced along gender lines – males (54%) and females (46%).
- Car campers in 2003 represent Americans of all age groups nearly equally - the median age is 35 years.
- Household affluence levels are fragmented, but modest overall – 80% of Participant households earn less than \$80,000 a year.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	48%	55%	51%	53%	54%	54%
Female	52%	45%	49%	47%	46%	46%
Age						
16 to 24	28%	21%	26%	28%	25%	25%
25 to 34	23%	20%	23%	23%	22%	23%
35 to 44	19%	26%	23%	22%	24%	22%
45+	29%	33%	28%	26%	29%	30%
Marital Status						
Married	52%	57%	54%	50%	54%	53%
Unmarried	48%	43%	46%	50%	46%	47%
Ethnicity						
Caucasian	89%	89%	87%	85%	88%	88%
African-American	3%	3%	4%	4%	4%	3%
Hispanic	5%	4%	4%	6%	5%	4%
Asian	2%	2%	2%	1%	2%	2%
Children <18						
Yes	44%	51%	52%	50%	50%	55%
Household Income						
<\$40k	NA	34%	38%	41%	39%	39%
\$40k - \$79k	NA	38%	45%	46%	42%	41%
\$80k+	NA	14%	17%	13%	19%	20%
Region						
Northeast	12%	14%	7%	12%	14%	16%
South Central	31%	30%	32%	27%	27%	30%
North Central	31%	26%	29%	27%	31%	26%
West	26%	30%	32%	33%	28%	28%

CAR CAMPING DEMOGRAPHIC PROFILE TRENDS OF ENTHUSIASTS

- In year 2003, car camping Enthusiasts tend to be male (61%) – consistent with the gender composition of the 2002 population.
- The car camping Enthusiast population continues to skew towards older Americans – more than one-half (55%) of Enthusiasts are 35 years of age or older. The median age of Enthusiasts is 39.
- Car camping Enthusiasts are nearly universally (95%) Caucasian in ethnicity.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	70%	56%	43%	52%	65%	61%
Female	30%	44%	57%	48%	35%	39%
Age						
16 to 24	42%	11%	13%	20%	18%	24%
25 to 34	9%	16%	25%	22%	20%	22%
35 to 44	19%	24%	23%	24%	22%	14%
45+	30%	49%	40%	33%	40%	41%
Marital Status						
Married	44%	68%	62%	55%	64%	55%
Unmarried	56%	32%	38%	45%	36%	45%
Ethnicity						
Caucasian	96%	94%	91%	93%	92%	95%
African-American	0%	2%	4%	1%	3%	1%
Hispanic	4%	1%	*	2%	3%	1%
Asian	*	*	1%	1%	1%	*
Children <18						
Yes	37%	37%	45%	40%	45%	46%
Household Income						
<\$40k	NA	38%	28%	35%	39%	37%
\$40k - \$79k	NA	33%	51%	49%	44%	52%
\$80k+	NA	14%	22%	16%	17%	11%
Region						
Northeast	14%	11%	6%	13%	17%	11%
South Central	28%	19%	31%	26%	30%	24%
North Central	28%	32%	39%	26%	30%	30%
West	31%	38%	25%	36%	24%	35%

CAR CAMPING CROSSOVER ACTIVITY IN YEAR 2003

Car campers in 2003 participated at moderate levels in other human powered activities.

Hiking is the most popular crossover activity among car campers with the majority (52.4%) of Participants involved.

Activities that car campers participated in at secondary levels during the year include paved road bicycling (49.3%), wide (26.9%) and single (26.2%) track bicycling.

Notably, Participants show a strong preference for their chosen camping format – only 1.1 million of the 53 million car camping Participants also went camping away from the car in 2003.

Activities	Car Campers - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Car Camping	100.0%	53.0
Hiking	52.4%	27.8
Bicycling - Paved Road	49.3%	26.1
Bicycling - Dirt Road	26.9%	14.2
Bicycling - Single Track	26.2%	13.9
Trail Running	21.7%	11.5
Canoeing	20.4%	10.8
Bird Watching	9.9%	5.2
Fly-Fishing	9.4%	5.0
Rafting	8.5%	4.5
Cross-Country/Nordic Skiing	6.7%	3.6
Backpacking	6.1%	3.2
Kayaking - Recreation/St-on-Top	3.8%	2.0
Climbing - Artificial Wall	3.7%	2.0
Snowshoeing	3.6%	1.9
Telemark Skiing	3.0%	1.6
Kayaking - Touring/Sea	3.0%	1.6
Climbing - Natural Rock	2.4%	1.3
Camping (Away from Car)	2.0%	1.1
Kayaking - Whitewater	1.3%	0.689
Climbing - Ice	0.5%	0.265

CAMPING (AWAY FROM CAR) PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:

With the exception of a particularly off-year in 1999, participation in camping (away from car) has remained primarily stable during the past six years.

Short-term Perspective (Compared to 2002):

Camping (away from car) Participant activity is basically flat compared to 2002 - 7.5% of Americans 16 and older or 16.5 million campers.

In 2003, Enthusiast activity in camping (away from car) is also unchanged from the previous year.

Three-Year Perspective (Compared to 2001):

The year 2003 Participation population is on par with the levels reported in 2001.

In the past three years, frequency of participation has leveled off in conjunction with population. Camping (away from car) is a stable activity.

Long-term Perspective (Compared to 1998):

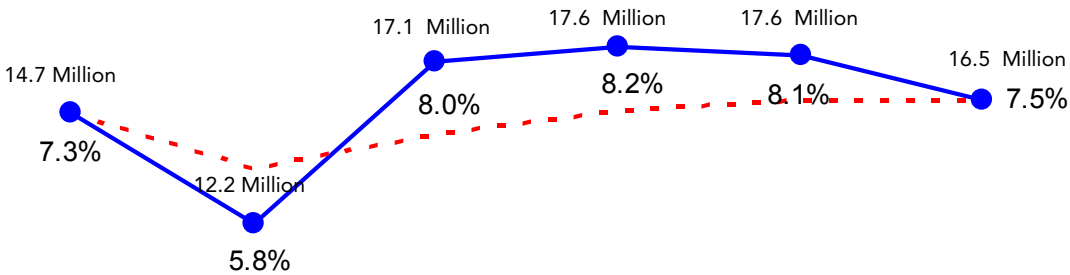
Participation in camping (away from car) in 2003 is aligned with year 1998 levels.

Cumulative Perspective (Rolling Trend):

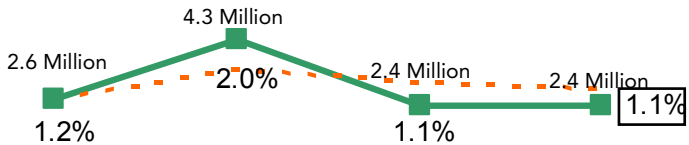
Rolling trend results show a gradual increase in Participant levels, as the activity steadily recovers from atypical involvement of Americans 16 and older in 1998.

Rolling trend Enthusiast levels have remained primarily stable over the past four years.

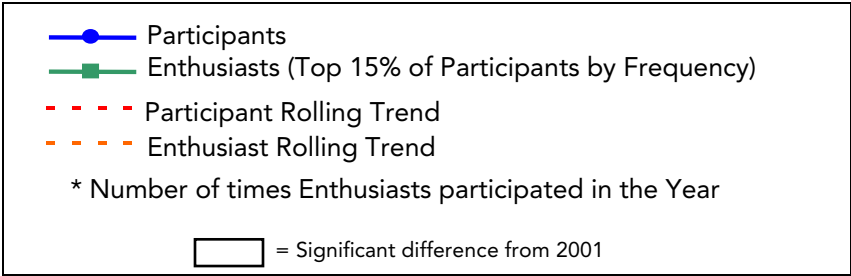
Participation in Camping (Away from Car)
% of U.S. Population Age 16 and Older



(12+ Times)* (8+Times)* (7+ Times)* (7+ Times)*



1998 1999 2000 2001 2002 2003



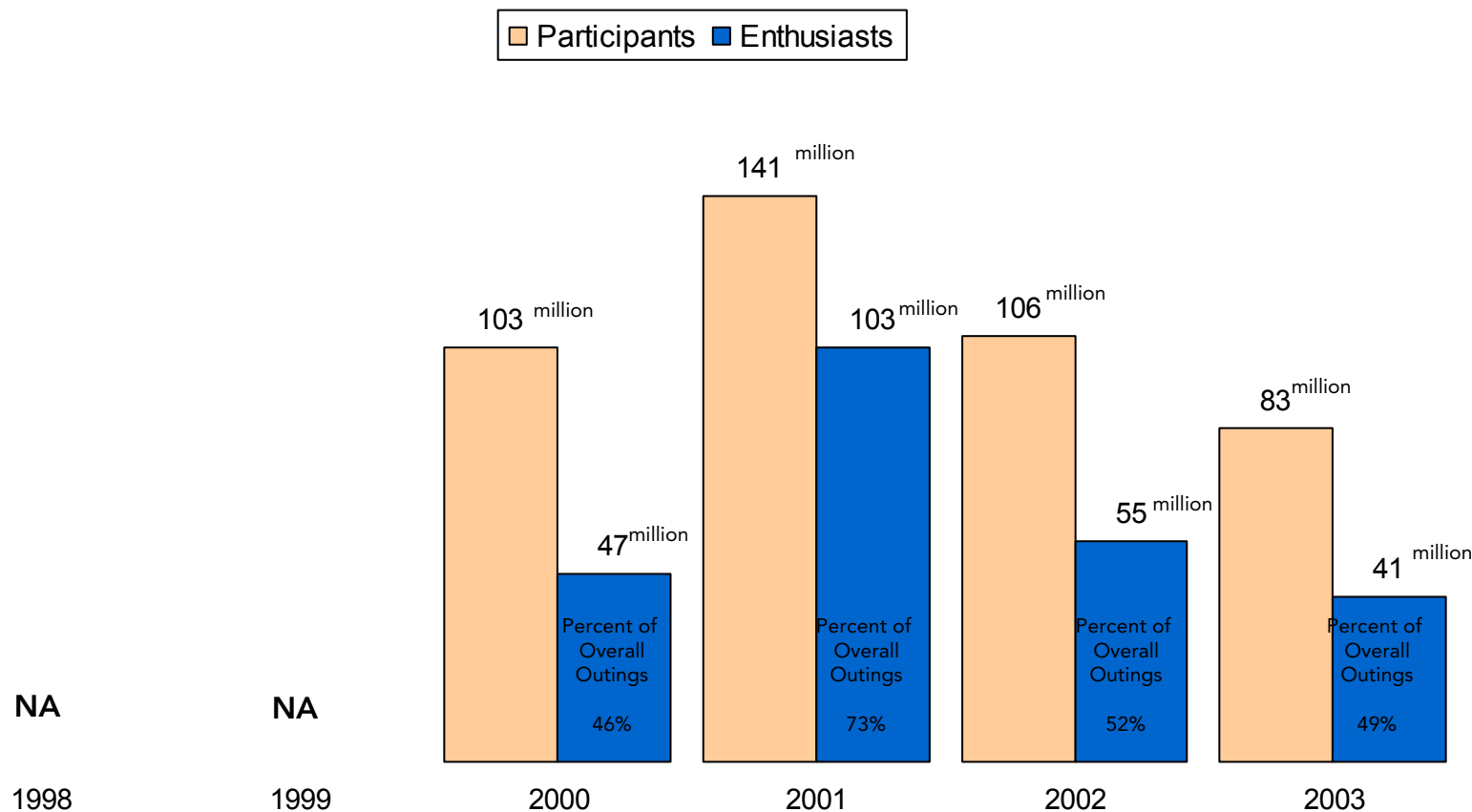
CAMPING (AWAY FROM CAR) TOTAL NUMBER OF OUTINGS PER YEAR*

During 2003, Americans 16 and older generated a total of 83 million camping (away from car) outings, the lowest number of total outings in the past four years. The comparatively low number of camping (away from car) outings in 2003 is the result of fewer Americans 16 and older participating in the activity and a decline in the average number of outings taken during the year by Participants.

During 2003 Enthusiasts accounted for 41 million backpacking outings – nearly one-half (49%) of total camping (away from car) outings taken during the year.

Generating more than 100 million camping outings (73% of the total occasions), Enthusiasts drove record high number of outings reported in 2001.

Camping Away from Car Outings in Each Year



* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went camping (away from car) each year

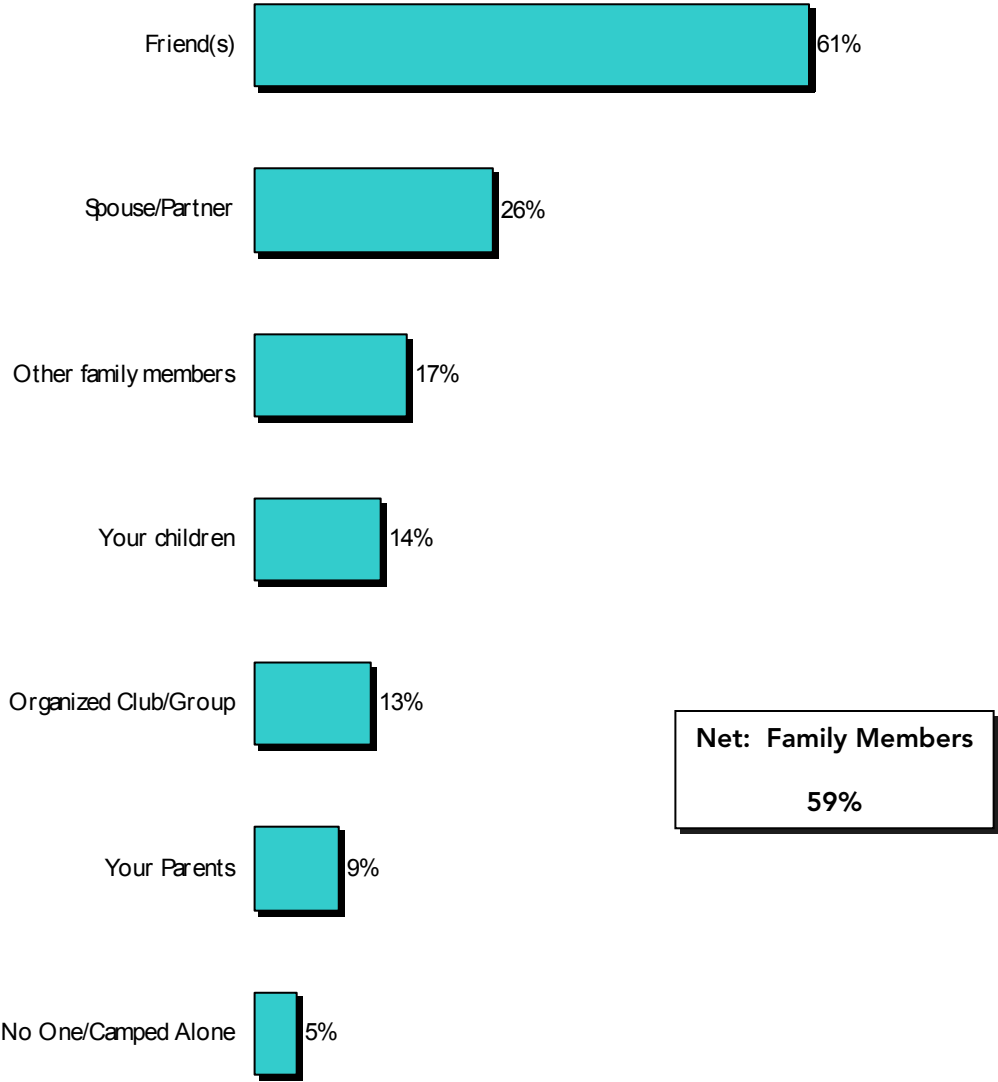
CAMPING (AWAY FROM CAR)

"Who do you usually camp with when you camp at least one-quarter of a mile from where you parked your car?"

Americans who camped (away from car) in 2003 participated in the activity with a wide variety of companions.

Friends (61%) are the most common activity companions among Americans who went camping away from the car in 2003 – by a wide margin.

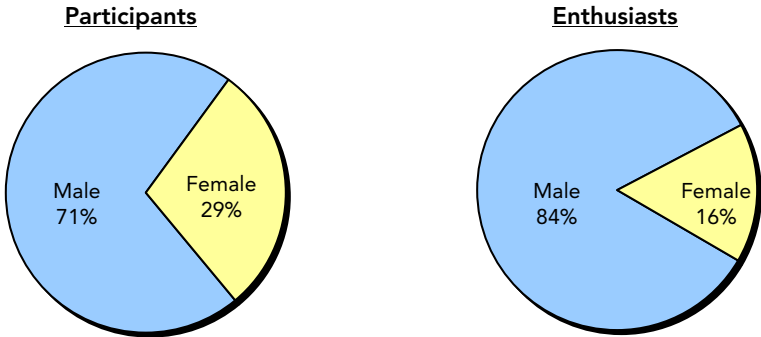
Family relations are the next most often companions among campers (away from car) – spouse/partner (26%), other family members (17%) and children (14%). In total, more than one-half (59%) of campers (away from car) participated with family members in 2003.



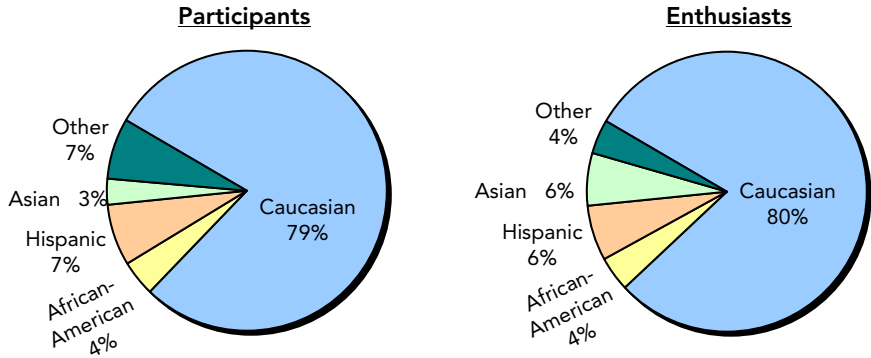
* Percentages based to Americans who camped away from car (7.5%) .

CAMPING AWAY FROM CAR DEMOGRAPHIC PROFILES

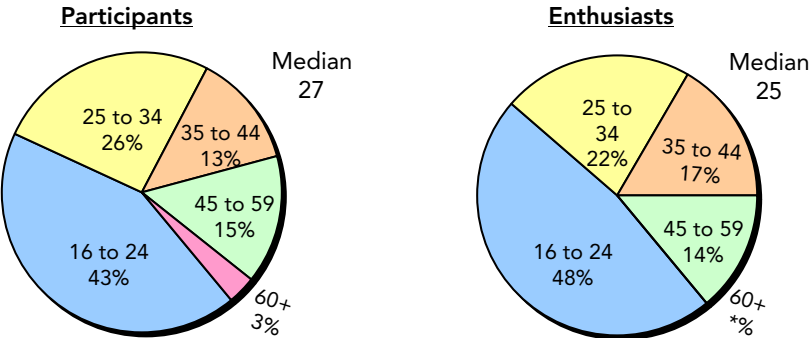
GENDER



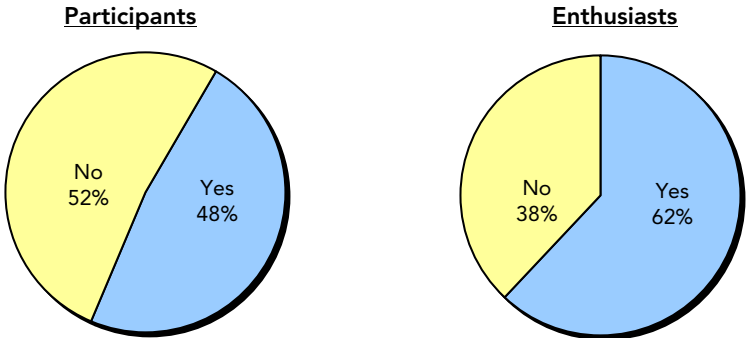
ETHNICITY



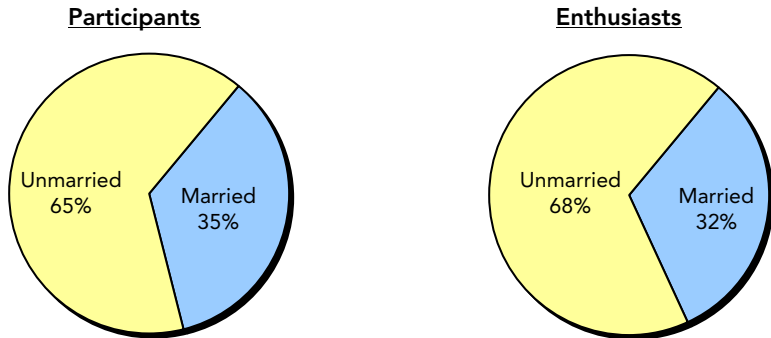
AGE



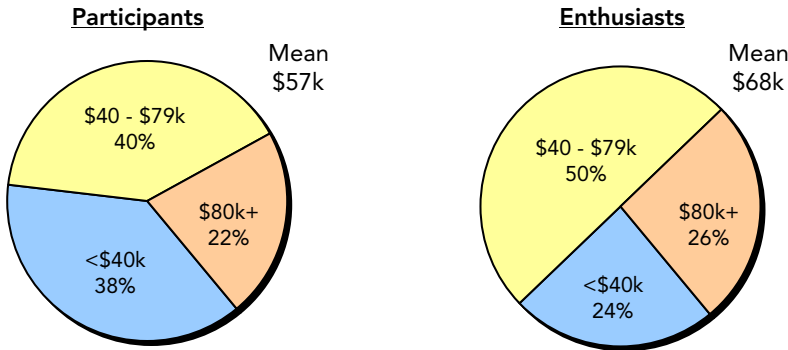
PRESENCE OF CHILDREN <18 in HOUSEHOLD



MARITAL STATUS



HOUSEHOLD INCOME



CAMPING AWAY FROM CAR DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- The population of Americans who went camping away from their car in 2003 skews strongly male (71%) – similar to the gender composition of previous populations.
- Camping (away from car) continues to be driven by younger Americans. More than four in 10 (43%) of the 2003 Participant population is between the ages of 16 and 24. And in 2003 camping away from the car experienced higher levels of participating among 25 to 34 year old Americans than in 2002 – yielding the youngest camping (away from car) in six years.

<u>Dimension</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>
<u>Gender</u>						
Male	69%	65%	63%	66%	66%	71%
Female	31%	35%	0%	34%	34%	29%
<u>Age</u>						
16 to 24	42%	35%	42%	39%	44%	43%
25 to 34	22%	28%	23%	25%	17%	26%
35 to 44	21%	19%	16%	16%	16%	13%
45+	15%	18%	19%	20%	23%	18%
<u>Marital Status</u>						
Married	35%	39%	34%	35%	35%	35%
Unmarried	65%	61%	66%	65%	65%	65%
<u>Ethnicity</u>						
Caucasian	83%	82%	82%	82%	85%	79%
African-American	5%	8%	4%	5%	5%	4%
Hispanic	8%	6%	7%	8%	5%	7%
Asian	2%	2%	6%	2%	3%	3%
<u>Children <18</u>						
Yes	46%	46%	51%	39%	45%	48%
<u>Household Income</u>						
<\$40k	NA	43%	46%	49%	39%	38%
\$40k - \$79k	NA	35%	38%	39%	39%	40%
\$80k+	NA	22%	16%	12%	22%	22%
<u>Region</u>						
Northeast	14%	14%	11%	21%	19%	21%
South Central	34%	30%	36%	36%	34%	31%
North Central	26%	26%	29%	16%	21%	19%
West	26%	30%	24%	27%	27%	29%

CAMPING AWAY FROM CAR DEMOGRAPHIC PROFILE TRENDS OF ENTHUSIASTS

- Demographically, camping (away from car) Enthusiasts in 2003 tend to be male (84%), young (48% are between 16 and 24 years old), unmarried (68%) and Caucasian (80%).
- The year 2003 Enthusiast population is affluent – more so than in previous years. Three-quarters (76%) of year 2003 Enthusiasts report household incomes of \$40,000 or more. The mean household income of year 2003 Enthusiasts is \$68,000 – up \$10,000 from the mean household income reported in 2002 (\$58,000).

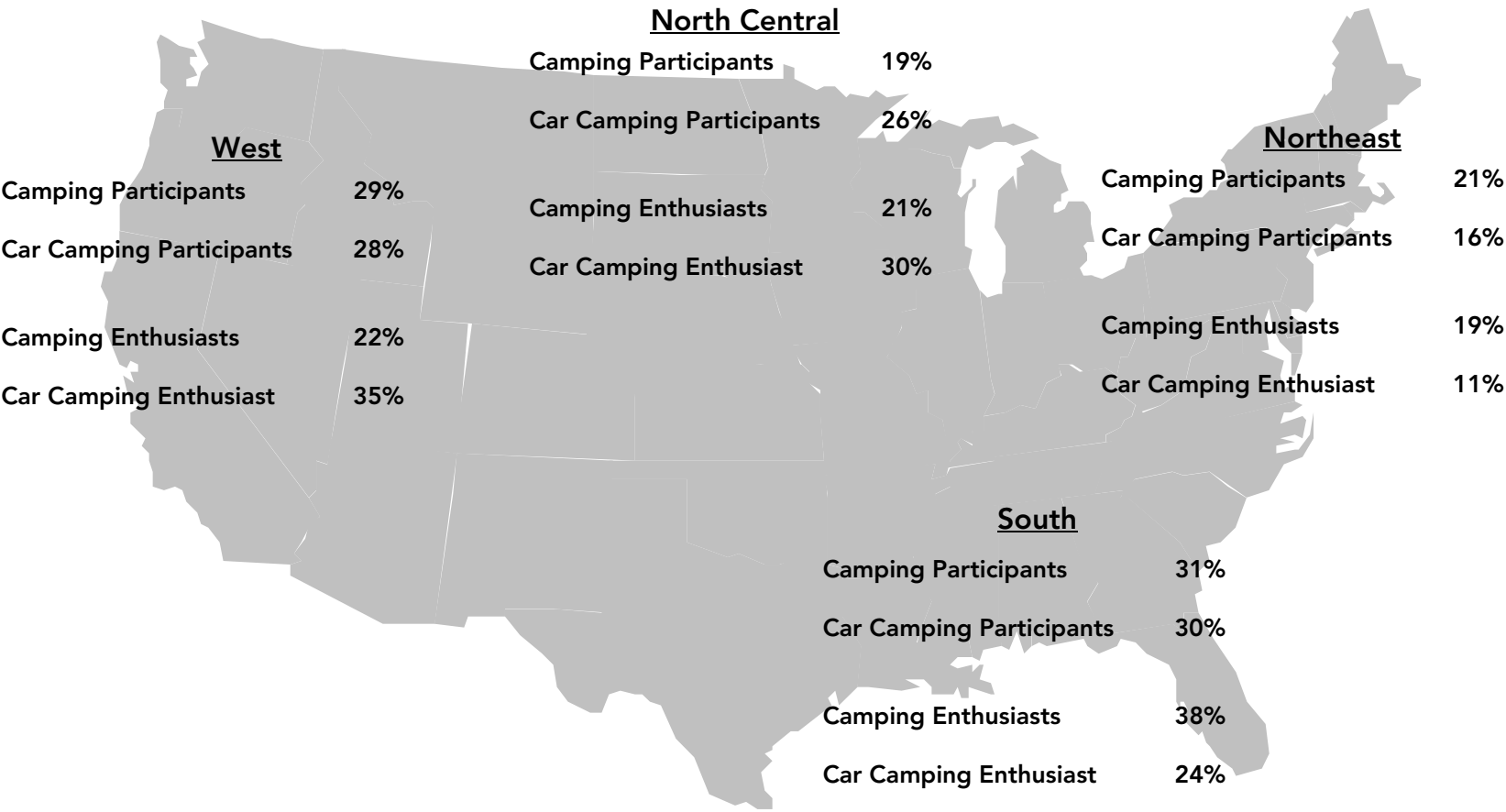
Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	NA	NA	NA	75%	84%	84%
Female	NA	NA	NA	25%	16%	16%
Age						
16 to 24	NA	NA	NA	43%	47%	48%
25 to 34	NA	NA	NA	22%	9%	22%
35 to 44	NA	NA	NA	17%	16%	17%
45+	NA	NA	NA	18%	28%	14%
Marital Status						
Married	NA	NA	NA	31%	28%	32%
Unmarried	NA	NA	NA	69%	72%	68%
Ethnicity						
Caucasian	NA	NA	NA	87%	87%	80%
African-American	NA	NA	NA	3%	3%	4%
Hispanic	NA	NA	NA	6%	6%	6%
Asian	NA	NA	NA	3%	2%	6%
Children <18						
Yes	NA	NA	NA	37%	27%	62%
Household Income						
<\$40k	NA	NA	NA	50%	42%	24%
\$40k - \$79k	NA	NA	NA	34%	33%	50%
\$80k+	NA	NA	NA	16%	25%	26%
Region						
Northeast	NA	NA	NA	22%	18%	19%
South Central	NA	NA	NA	27%	33%	38%
North Central	NA	NA	NA	13%	18%	21%
West	NA	NA	NA	38%	31%	22%

CAMPING REGIONAL PROFILE YEAR 2003

The profile of Americans who went camping in 2003 reveals differences based on the type of camping; particularly Americans who are Enthusiasts within the respective activities.

Car camping Participants tend to live in three regions – South (30%), West (28%) and North Central (26%). Car camping Enthusiasts are concentrated more heavily in the West (35%) than in other regions.

Americans who camp away from their vehicle primarily live in the South (31%) and West (29%). Americans who participate in camping at Enthusiast levels are most likely to live in the South (38%) .



CAMPING AWAY FROM CAR CROSSOVER ACTIVITY IN YEAR 2003

Year 2003 campers (away from car) report high levels of participation in a variety of human powered activities.

Nearly three-quarters (73.1%) of campers (away from car) also went hiking in 2003 – more than 12 million Americans 16 and older.

Other activities in which campers (away from car) participated in during 2003 include paved road bicycling (50.0%), backpacking (46.7%), single track bicycling (40.1%), wide track bicycling (39.7%), and trail running (38.5%).

Campers (away from car) have little interest in car camping. During 2003, only 6.6% (or 1.1 million of nearly 17 million) Participants also went car camping.

Activities	Campers (Away from Car) - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Camping (Away from Car)	100.0%	16.5
Hiking	73.1%	12.1
Bicycling - Paved Road	50.0%	8.2
Backpacking	46.7%	7.6
Bicycling - Single Track	40.1%	6.6
Bicycling - Dirt Road	39.7%	6.5
Trail Running	38.5%	6.4
Canoeing	32.8%	5.4
Rafting	17.7%	2.9
Fly-Fishing	17.5%	2.9
Climbing - Artificial Wall	13.9%	2.3
Cross-Country/Nordic Skiing	13.5%	2.2
Climbing - Natural Rock	13.1%	2.2
Bird Watching	13.2%	2.1
Kayaking - Recreation/St-on-Top	11.6%	1.9
Showshoeing	9.6%	1.6
Kayaking - Touring/Sea	9.4%	1.6
Car Camping	6.6%	1.1
Telemark Skiing	6.1%	1.0
Kayaking - Whitewater	2.6%	0.429
Climbing - Ice	1.6%	0.264

OUTDOOR RECREATION PARTICIPATION STUDY

CANOEING

"Have you gone canoeing?"

CANOEING

Headlines

- Based on participation levels, canoeing ranks as the most popular of the paddlesports of 2003 – more than 22 million Participants and 3.5 million Enthusiasts
- Despite the widespread popularity, canoeing Participant and Enthusiast levels remain flat compared to 2002
- Participants generated a total of 112 million canoeing outings in 2003; 77 million outings were sourced by Enthusiasts

The average number of times that Participants went canoeing in 2003 is five.

The majority (80%) of Participants went canoeing less than the average number of times and more than one in 10 (11%) went canoeing more than average. 35% of Participants went canoeing only one time in 2003

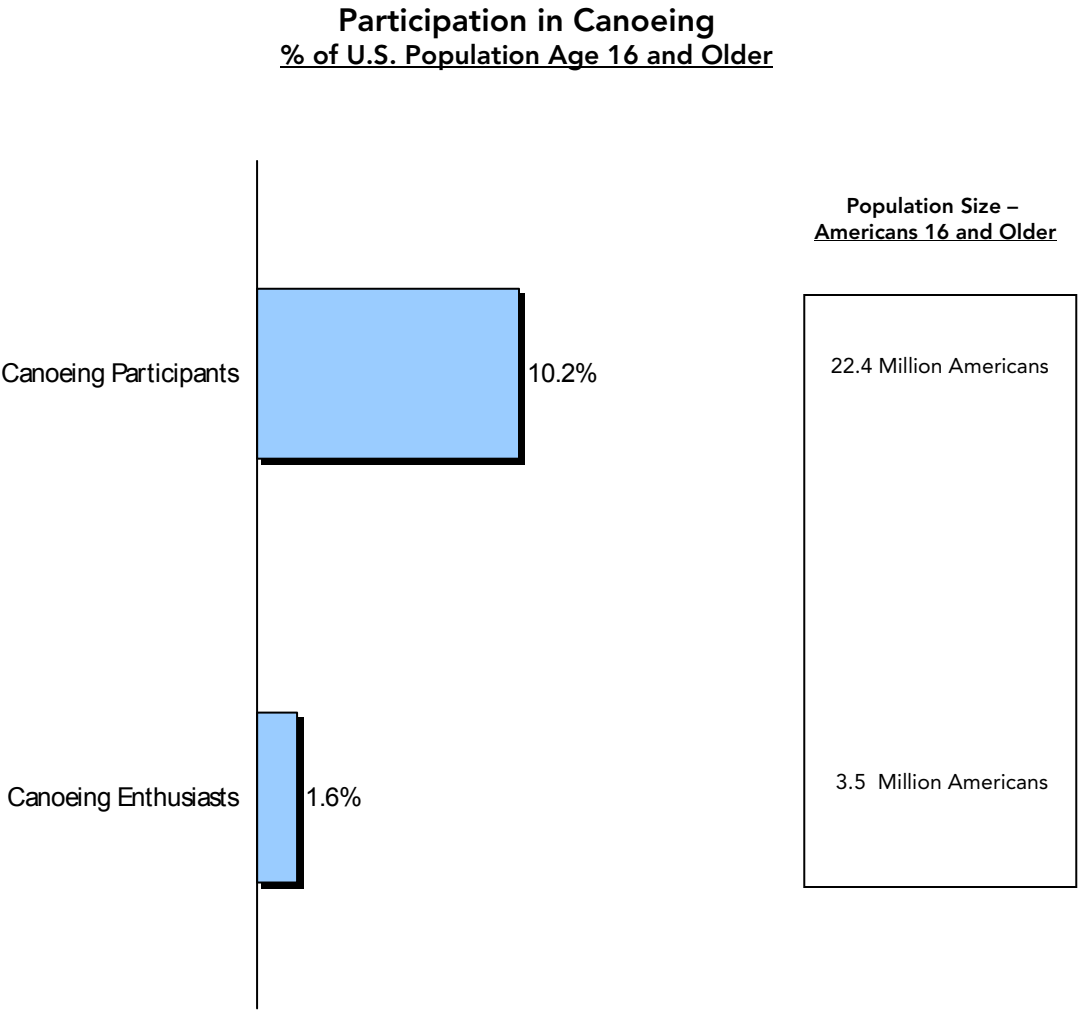
- Males were the primary source of canoeing participation during 2003; a representation that has increased significantly since 1998
- The Enthusiast population reveals a degree of polarization along age lines – the highest representation is among 16 to 24 year olds and Americans 45 and older
- Year 2003 Participants are more likely to live in the South region and North Central regions
- Enthusiasts are concentrated in the Northeast and North Central regions
- Compared to the overall population of Americans 16 and older, canoers report higher than average crossover participation levels in rafting and kayaking

CANOEING PARTICIPANT & ENTHUSIAST LEVELS IN YEAR 2003

Based on participation levels, canoeing ranks as the most popular paddlesport of 2003.

More than one in 10 (10.2%) Americans 16 and older went canoeing at least one time in 2003. The Participant population includes 22.4 million Americans 16 and older.

Enthusiast level canoeing (six or more times) yields a population of 3.5 million.



CANOEING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:
Although not on par with the single year of 2001, canoeing has benefited from recent popularity among Americans 16 and older.

Short-term Perspective (Compared to 2002):
Canoeing participation in 2003 remained consistent when compared to 2002 - 10.2% or more than 22 million Americans 16 and older.

The number of canoers who participated at the highest frequency levels in 2003 (3.5 million) remains aligned with Enthusiast activity in 2002.

Three-Year Perspective (Compared to 2001):
In 2003, participation in canoeing is lower than the record high levels of participation reported in 2001.

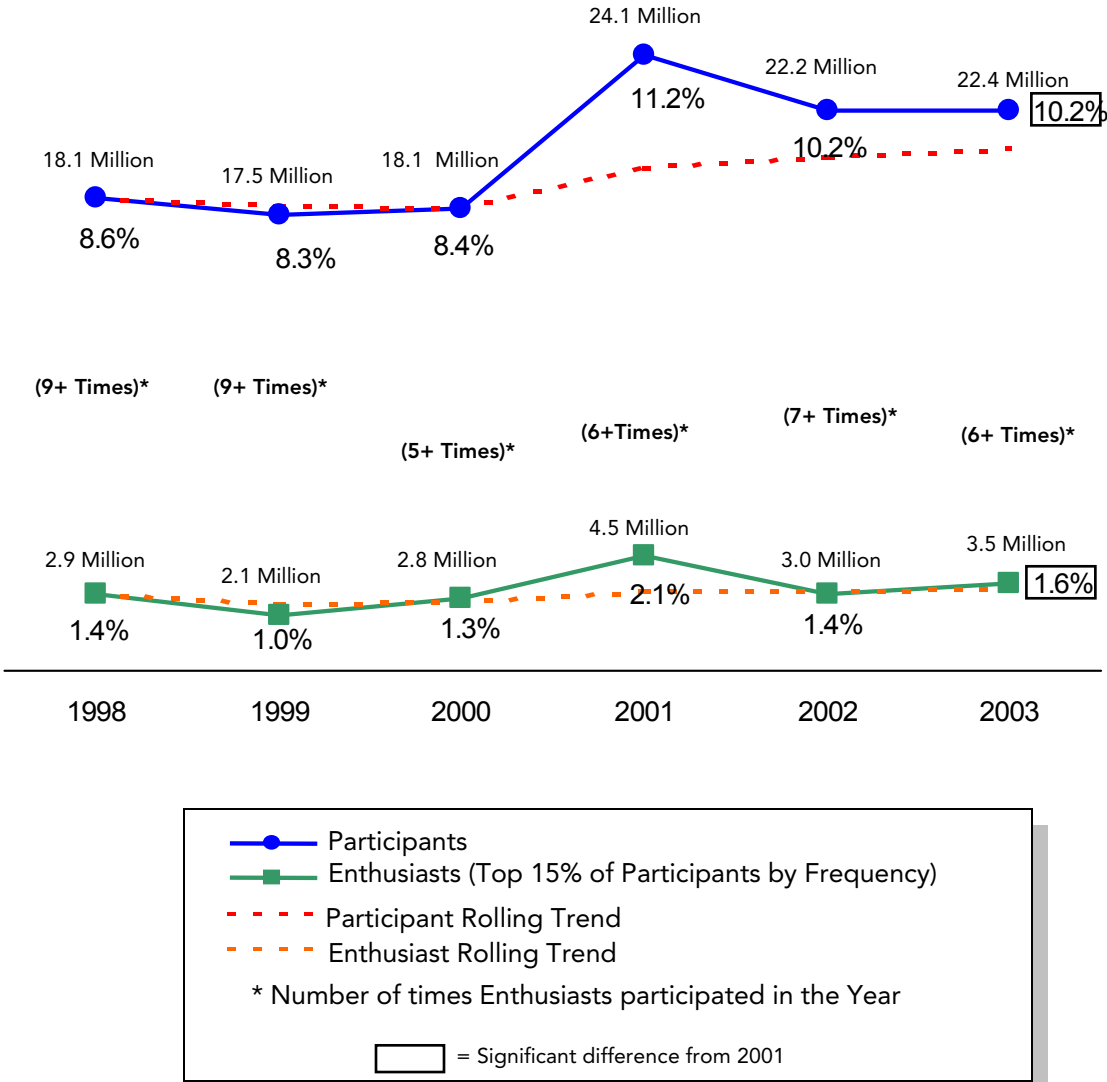
Enthusiast levels have also declined when compared to 2001.

Long-term Perspective (Compared to 1998):
Participation in canoeing in 2003 remains well above the activity level reported in 1998.

The constant participation levels since 1998 depict canoeing as a solid outdoor activity. However, a slight decline in the frequency of outings since 1998 reveals the shift in population may not be as big as both an increase in incidence and population.

Cumulative Perspective (Rolling Trend):
Rolling trend results show a gradual increase in Participant levels.

Participation in Canoeing
% of U.S. Population Age 16 and Older

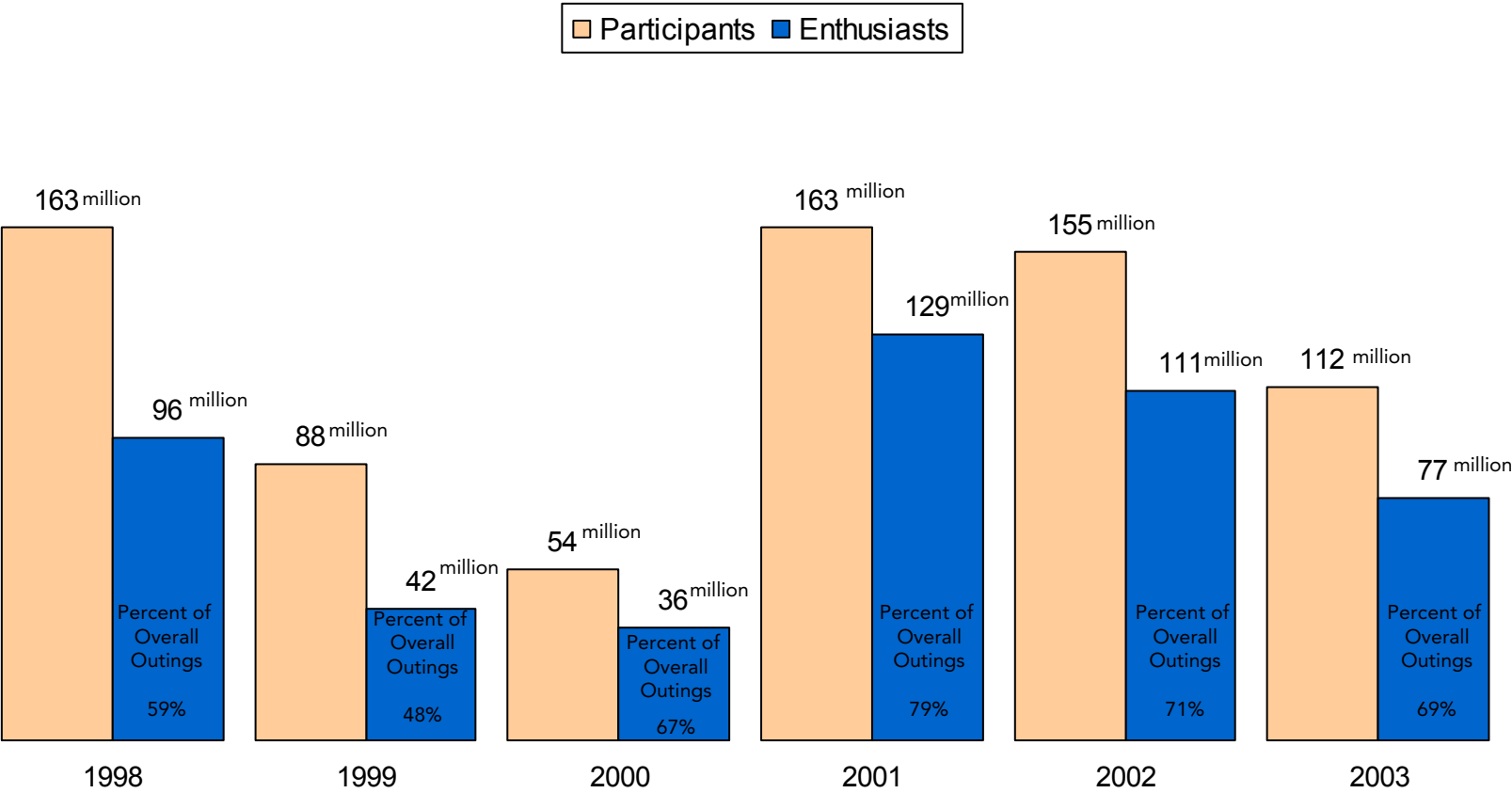


CANOEING TOTAL NUMBER OF OUTINGS PER YEAR*

Americans 16 and older generated a total of 112 million canoeing outings during 2003. The total number of outings in 2003 has declined from record high numbers reported in the previous two years due to a lower number of average outings taken in 2003 (five outings) compared to in 2001 and 2002 when the average number of outings reached seven.

During 2003 Enthusiasts accounted for more than two-thirds (69%) of total canoeing outings – equal to 77 million outings.

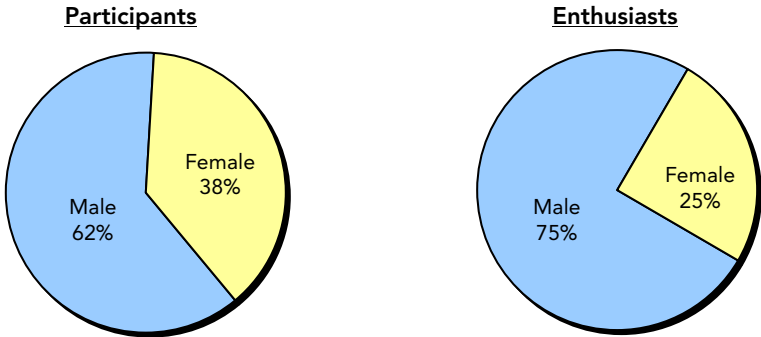
Canoeing Outings in Each Year



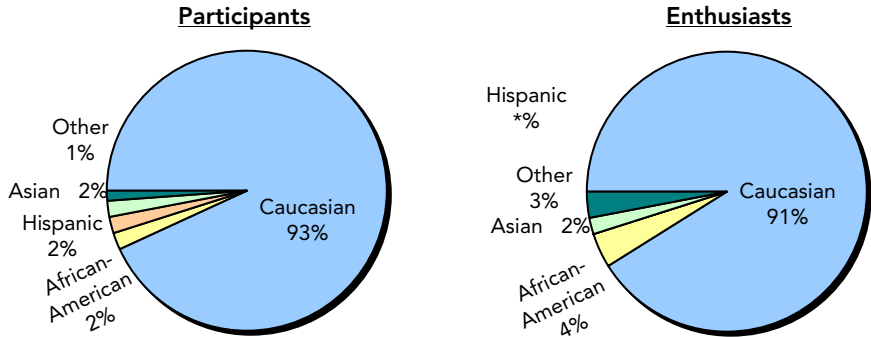
* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went canoeing each year

CANOEING DEMOGRAPHIC PROFILE

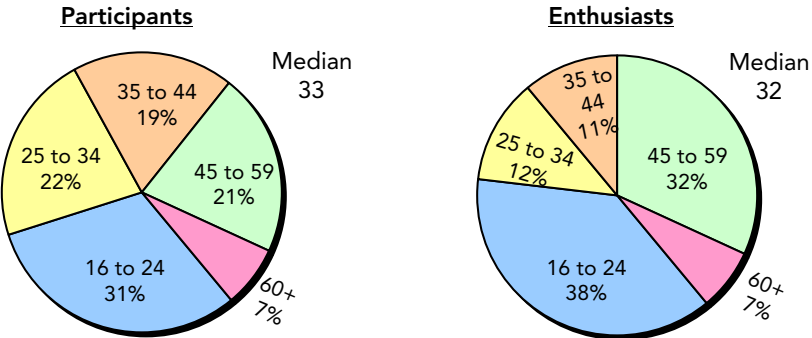
GENDER



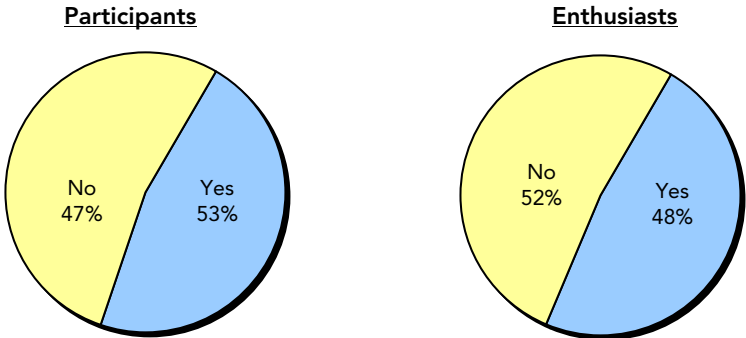
ETHNICITY



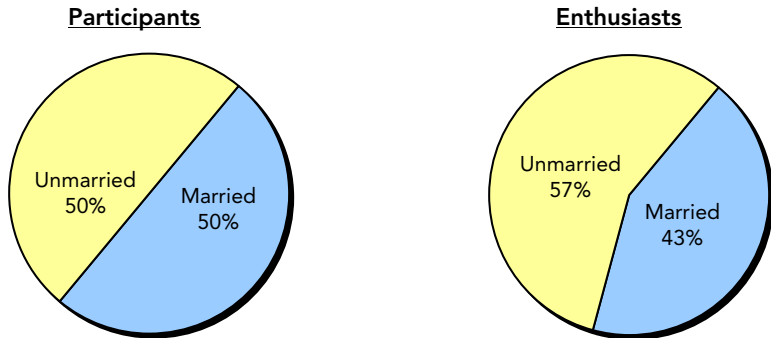
AGE



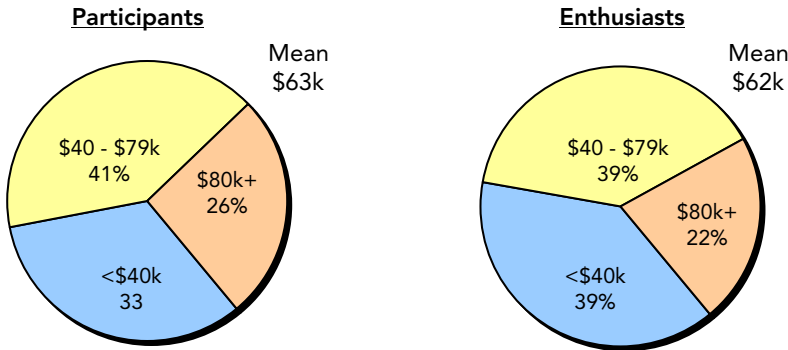
PRESENCE OF CHILDREN <18 in HOUSEHOLD



MARITAL STATUS



HOUSEHOLD INCOME



CANOEING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- Historically, the canoeing Participant population has been comprised primarily of males and in year 2003 nearly two-thirds (62%) of Americans who went canoeing were male. The representation of males in the 2003 population is higher than in 1998.
- In year 2003 canoeing benefited from the participation of Americans of all ages. The median age of canoeing Participants in 2003 is 33.
- Nearly all (93%) canoers in 2003 are of Caucasian ethnicity.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	55%	55%	53%	56%	58%	62%
Female	45%	45%	47%	44%	42%	38%
Age						
16 to 24	29%	29%	23%	29%	29%	31%
25 to 34	19%	25%	20%	22%	23%	22%
35 to 44	25%	23%	29%	24%	21%	19%
45+	27%	24%	27%	25%	27%	28%
Marital Status						
Married	48%	54%	51%	44%	47%	50%
Unmarried	52%	46%	49%	56%	53%	50%
Ethnicity						
Caucasian	94%	93%	91%	90%	90%	93%
African-American	1%	2%	2%	2%	3%	2%
Hispanic	2%	3%	2%	4%	2%	2%
Asian	2%	*	2%	2%	3%	2%
Children <18						
Yes	46%	48%	56%	43%	49%	53%
Household Income						
<\$40k	NA	24%	26%	35%	26%	33%
\$40k - \$79k	NA	39%	45%	47%	43%	41%
\$80k+	NA	21%	29%	18%	31%	26%
Region						
Northeast	26%	20%	9%	21%	25%	23%
South Central	35%	33%	40%	31%	30%	33%
North Central	30%	33%	36%	28%	32%	28%
West	9%	15%	15%	20%	13%	16%

CANOEING DEMOGRAPHIC PROFILE TRENDS OF ENTHUSIASTS

- Three-quarters (75%) of Americans who went canoeing six or more times in 2003 are male – a short-term trend of higher representation of males first revealed in 2002.
- Year 2003 canoeing Enthusiasts are of all ages. One-half of Enthusiasts are between the ages of 16 and 34 (50%). In 2003 canoeing experienced an increased representation among Americans 45 and older – pushing the median age of the segment to 32 years of age (compared to 29.5 median age in 2001).
- The year 2003 canoeing Enthusiast population remains homogenous from an ethnic standpoint – 91% of Enthusiasts are Caucasian.
- In 2003, canoeing Enthusiasts are more likely to live in the Northeast than in previous years.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	63%	48%	59%	63%	76%	75%
Female	37%	35%	41%	37%	24%	25%
Age						
16 to 24	25%	23%	12%	26%	33%	38%
25 to 34	16%	13%	7%	24%	20%	12%
35 to 44	25%	23%	39%	25%	22%	11%
45+	34%	42%	42%	26%	25%	39%
Marital Status						
Married	63%	52%	61%	51%	44%	43%
Unmarried	37%	48%	39%	49%	56%	57%
Ethnicity						
Caucasian	93%	90%	90%	91%	96%	91%
African-American	3%	7%	*	3%	1%	4%
Hispanic	3%	0%	*	0%	1%	0%
Asian	*	*	6%	3%	1%	2%
Children <18						
Yes	46%	48%	56%	43%	43%	48%
Household Income						
<\$40k	NA	24%	26%	30%	27%	39%
\$40k - \$79k	NA	39%	45%	46%	44%	39%
\$80k+	NA	21%	29%	24%	29%	22%
Region						
Northeast	29%	19%	10%	20%	33%	38%
South Central	29%	52%	48%	39%	33%	19%
North Central	25%	16%	36%	25%	17%	33%
West	17%	13%	7%	17%	17%	10%

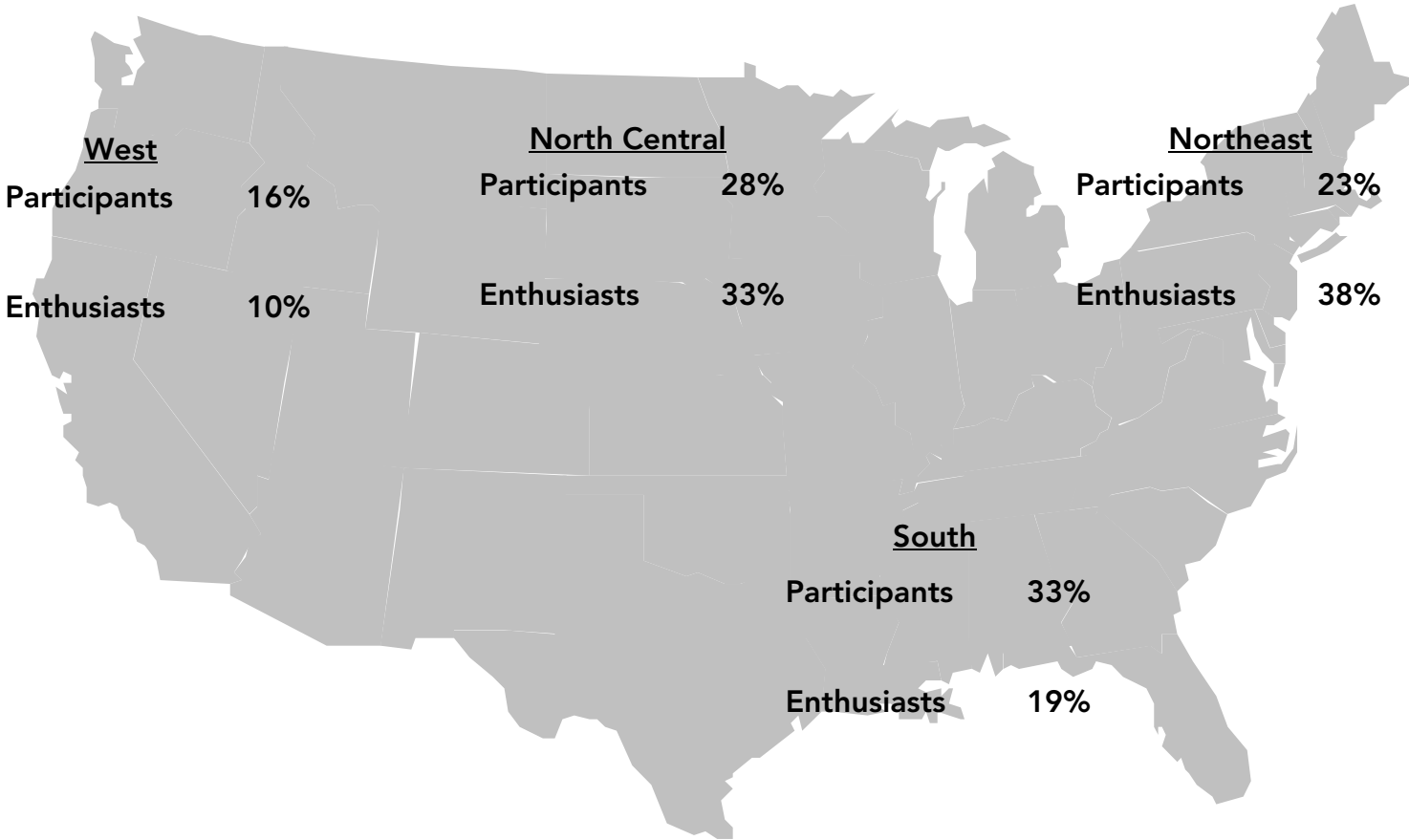
 = Significant difference from 2001

CANOEING REGIONAL PROFILE YEAR 2003

Year 2003 canoeing Participants are most likely to live in the South (33%) and North Central (28%) regions.

Canoers who participated at Enthusiast levels in 2003 are concentrated in the Northeast (38%) and a third in North Central

Comparatively, year 2003 canoeing Participants and Enthusiasts are least likely to live in the West region of the U.S.



CANOEING CROSSOVER ACTIVITY IN YEAR 2003

In year 2003, canoers most commonly participated in hiking (71.3%), paved road bicycling (53.8%) and car camping (48.4%).

Compared to the general population, canoers also report high crossover participation levels in other paddlesports – rafting (22.6%), touring/sea (10.2%), recreation/sit-on-top (13.7%), and whitewater (3.9%) kayaking.

Activities	Canoers - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Canoeing	100.0%	22.4
Hiking	71.3%	16.0
Bicycling - Paved Road	53.8%	12.1
Car Camping	48.4%	10.8
Bicycling - Dirt Road	33.9%	7.6
Bicycling - Single Track	32.4%	7.2
Trail Running	31.7%	7.1
Camping (Away from Car)	24.1%	5.4
Rafting	22.6%	5.1
Backpacking	17.9%	4.0
Fly-Fishing	15.9%	3.6
Kayaking - Recreation/Sit-on-Top	13.7%	3.1
Bird Watching	12.9%	2.8
Cross-Country/Nordic Skiing	12.4%	2.8
Kayaking - Touring/Sea	10.2%	2.3
Showshoeing	10.1%	2.3
Climbing - Artificial Wall	9.3%	2.1
Climbing - Natural Rock	7.0%	1.6
Telemark Skiing	4.5%	1.0
Kayaking - Whitewater	3.9%	0.874
Climbing - Ice	0.5%	0.112

OUTDOOR RECREATION PARTICIPATION STUDY

CLIMBING

"Have you gone climbing with a rope & harness on an artificial climbing wall?"

"Have you gone climbing with a rope & harness on a natural rock surface outside?"

"Have you gone climbing with a rope & harness on an extremely steep or vertical ice surface?"

CLIMBING

Headlines

- Nearly **9 million** Americans 16 and older participated in one of the climbing formats in 2003; Enthusiasts **1.5 million**
- Participant levels in 2003 decreased from 2002 levels in all climbing formats
- Enthusiast activity in 2003 is unchanged – with the exception of ice climbing which declined from 2002 levels
- Climbing Participants and Enthusiasts have a distinct demographic profile – strong representation of male and young Americans

ARTIFICIAL WALL CLIMBING

- In year 2003, artificial wall climbing remains the most popular climbing format with 6.4 million Participants; natural rock Participants number 4.6 million; 659 thousand Americans went ice climbing in 2003
- Enthusiast activity is also strongest among artificial wall climbers (1.1 million Enthusiasts); natural rock (659 thousand), ice (110 thousand)
- The median age of year 2003 artificial wall climbing Participants is 20 – the youngest of any of the activity populations.

Participants went artificial wall climbing an average of seven times.

79% of Participants went artificial wall climbing less than the average number of times and 15% went artificial wall climbing eight times or more. 36.5% of Participants went artificial wall climbing only one time in 2003

NATURAL ROCK CLIMBING

- Participants generated a total of 37 million natural rock climbing outings in 2003

Participants went natural rock climbing an average of 8 times in 2003.

Nearly three-quarters (73%) of Participants went natural rock climbing less than the average number of times and 11% went natural rock climbing more than average. 30% of Participants went natural rock climbing only one time in 2003

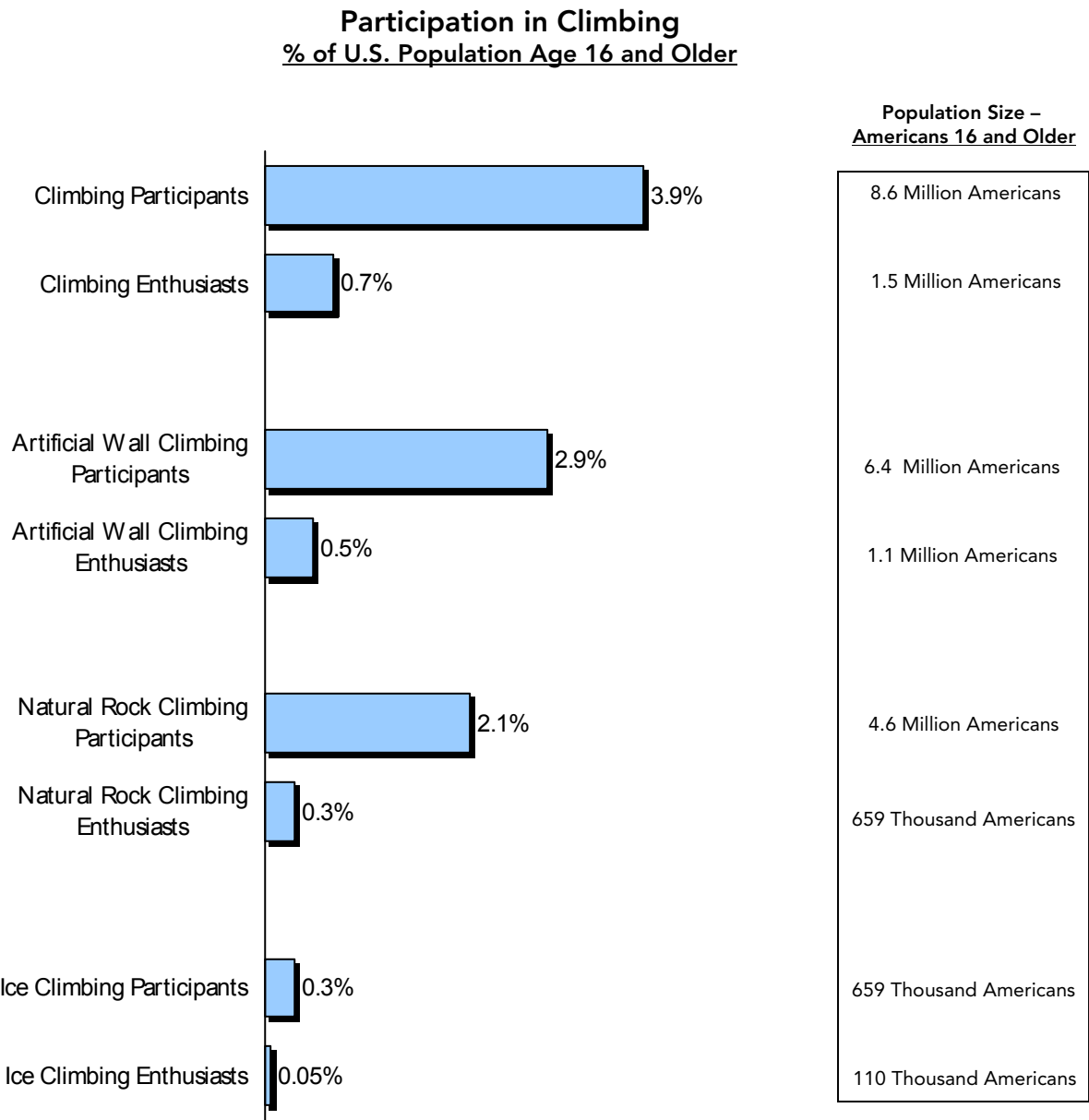
CLIMBING PARTICIPANT & ENTHUSIAST LEVELS IN YEAR 2003

Overall, 3.9% of Americans – or 8.6 million people 16 and older – report that they participated in some type of rope and harness climbing in 2003. Across all climbing activities, 1.5 million of those climbers 16 and older participated at Enthusiast levels.

Notably, as the accessibility and convenience of artificial wall climbing increases, more Americans participated in artificial wall climbing in 2003 than in other climbing formats. More than six million Americans 16 and older went climbing on an artificial wall in 2003 – a year 2003 population that exceeds the number of natural rock climbers (4.6 million).

The number of Americans 16 and older who are climbing artificial wall facilities at Enthusiast levels also exceeds the size of the natural rock climbing Enthusiast population in 2003 – 1.1 million and 659 thousand Americans 16 and older respectively.

The technical skills and more limited accessibility associated with ice climbing activity yields a year 2003 Participant and Enthusiast population that are particularly modest – 659 thousand and 110 thousand respectively.



NATURAL ROCK CLIMBING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:

The consistent popularity of natural rock climbing during the past several years eroded in 2003.

Short-term Perspective (Compared to 2002):

In 2003, participation in natural rock climbing declined 32% - reaching an all-time low level of Participant activity.

With virtually the same amount of frequency in 2002 as in 2003, the Enthusiast population dramatically dropped.

Three-Year Perspective (Compared to 2001):

In 2003, participation in natural rock climbing is lower than in 2001.

Enthusiast levels have declined when compared to 2001, with a bright spot on the incidence. Those who were climbing on natural rock, were consistent over the three years.

Long-term Perspective (Compared to 1998):

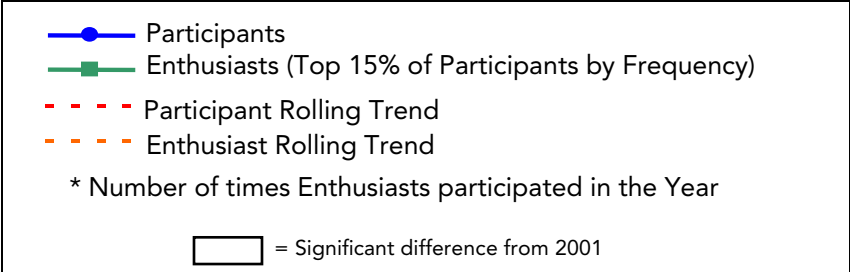
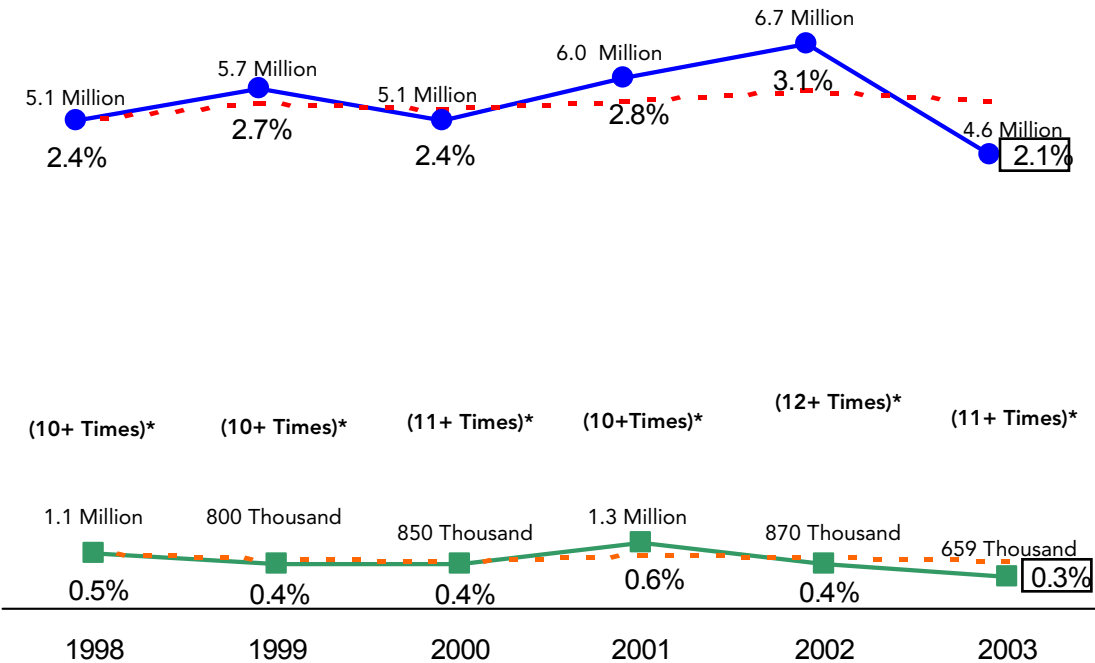
Participation in natural rock climbing in 2003 is on par with the activity level reported in 1998.

Commitment to the activity is also similar to 1998 levels .

Cumulative Perspective (Rolling Trend):

Rolling trend Participant and Enthusiast levels have remained primarily stable over the past six years.

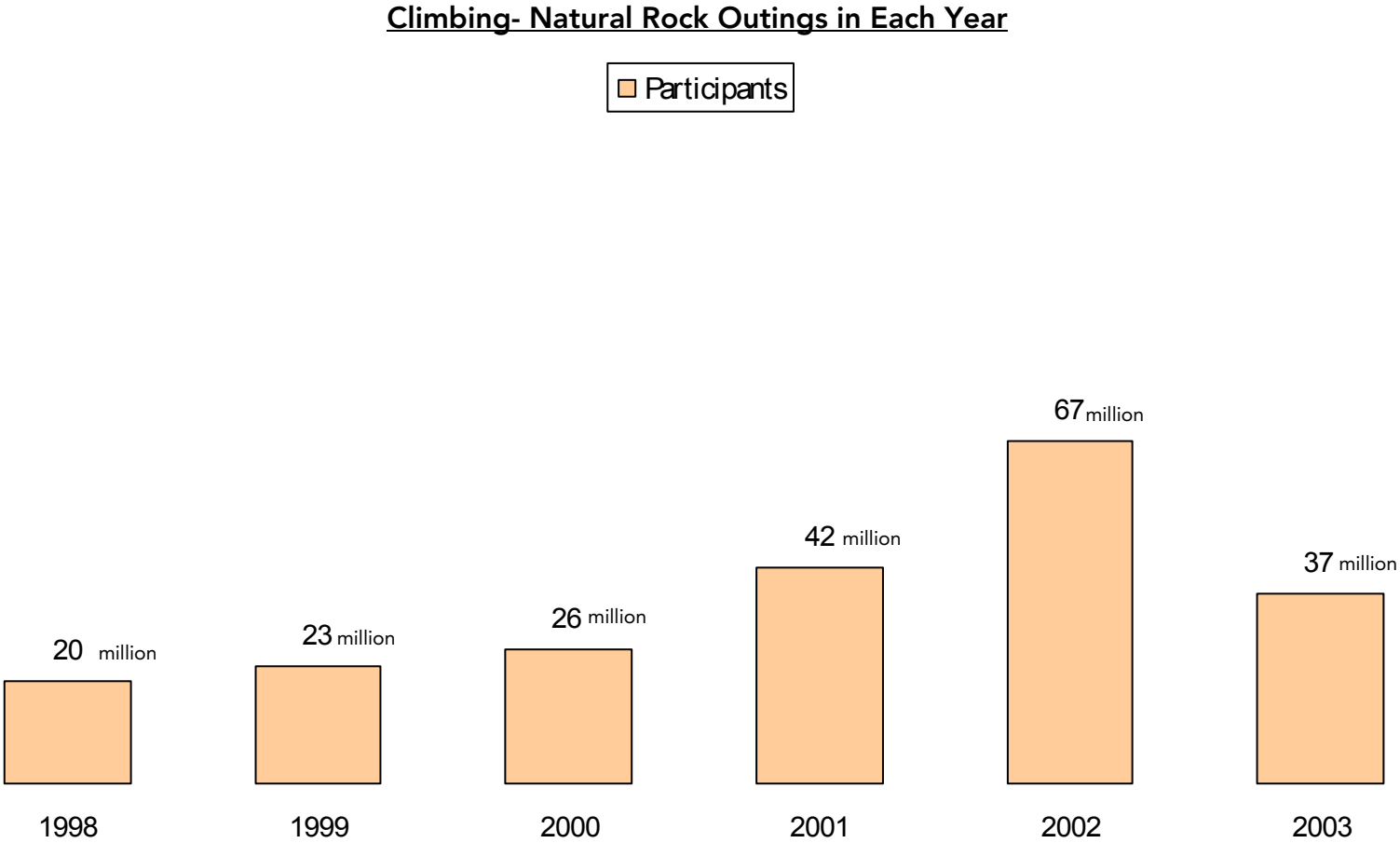
Participation in Rock Climbing
% of U.S. Population Age 16 and Older



NATURAL ROCK CLIMBING TOTAL NUMBER OF OUTINGS PER YEAR*

Natural rock climbers generated a total of 37 million outings in 2003.

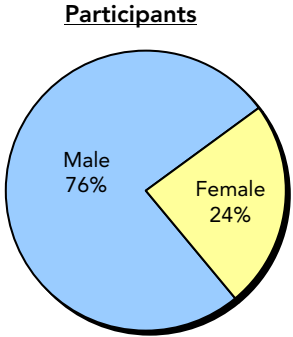
The number of natural rock climbing outings in 2003 is well-below the record level reported in 2002 (67 million), but is on par with 2001 (42 million) and has nearly doubled since first tracked in 1998 (20 million).



* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went natural rock climbing each year

NATURAL ROCK CLIMBING DEMOGRAPHIC PROFILE

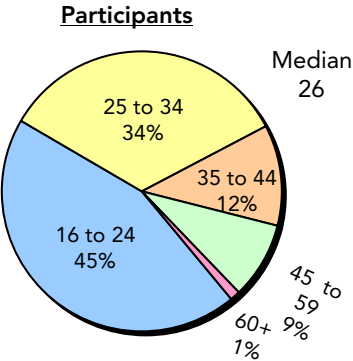
GENDER



Enthusiasts

NA

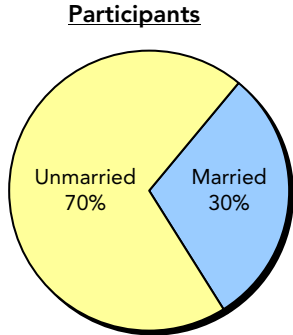
AGE



Enthusiasts

NA

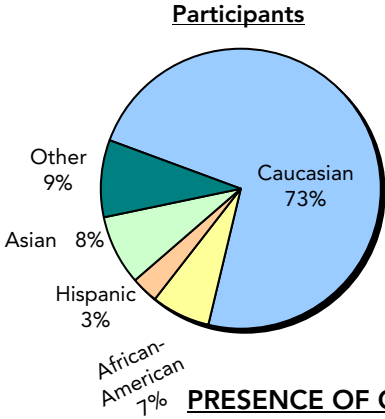
MARITAL STATUS



Enthusiasts

NA

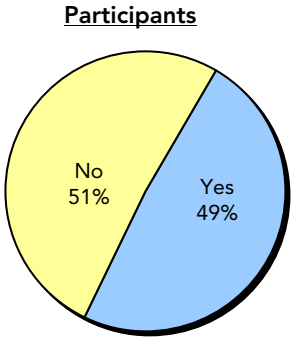
ETHNICITY



Enthusiasts

NA

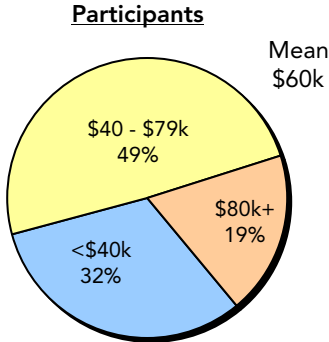
PRESENCE OF CHILDREN <18 in HOUSEHOLD



Enthusiasts

NA

HOUSEHOLD INCOME



Enthusiasts

NA

NATURAL ROCK CLIMBING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- Natural rock climbing remains an activity primarily participated in by males – more than three-quarters (76%) of year 2003 Participants are male.
- The 2003 rock climbing Participant population is primarily comprised of young Americans. More than three-quarters (79%) of Participants in 2003 are between the ages of 16 and 34. In contrast, fewer than one-half (46%) of Participants in 1998 were between the ages of 16 and 34.

<u>Dimension</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>
<u>Gender</u>						
Male	67%	68%	61%	66%	72%	76%
Female	33%	32%	39%	34%	28%	24%
<u>Age</u>						
16 to 24	20%	42%	52%	54%	46%	45%
25 to 34	26%	21%	22%	22%	20%	34%
35 to 44	13%	21%	17%	14%	17%	12%
45+	11%	17%	9%	11%	17%	10%
<u>Marital Status</u>						
Married	26%	29%	31%	32%	36%	30%
Unmarried	74%	71%	69%	68%	64%	70%
<u>Ethnicity</u>						
Caucasian	91%	83%	81%	84%	84%	73%
African-American	2%	4%	3%	4%	10%	7%
Hispanic	4%	1%	3%	3%	4%	3%
Asian	2%	4%	2%	2%	2%	8%
<u>Children <18</u>						
Yes	33%	49%	51%	39%	54%	49%
<u>Household Income</u>						
<\$40k	NA	29%	35%	43%	38%	32%
\$40k - \$79k	NA	27%	37%	37%	27%	49%
\$80k+	NA	21%	27%	20%	35%	19%
<u>Region</u>						
Northeast	20%	16%	13%	16%	20%	13%
South Central	28%	24%	29%	30%	35%	39%
North Central	25%	18%	25%	19%	22%	19%
West	28%	42%	34%	35%	23%	28%

NATURAL ROCK CLIMBING CROSSOVER ACTIVITY IN YEAR 2003

Year 2003 natural rock climbers are particularly active and report diverse interests in human powered activities.

During 2003 the majority of natural rock climbers also participated in hiking (82.4%), trail running (56.0%), paved road (54.6%) and single track (53.0%) bicycling.

During 2003, Participants did not limit their climbing activity to natural rock surface. Nearly two-thirds (61.3%) of Participants also went artificial wall climbing – revealing a crossover population that includes nearly three million Americans 16 and older. One in 10 (10.6% or 488 thousand) natural rock climbers also tackled ice climbing in 2003 – a particularly strong crossover participation when compared to the overall population.

Activities	Natural Rock Climbers - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Climbing - Natural Rock	100.0%	4.6
Hiking	82.4%	3.8
Climbing - Artificial Wall	61.3%	2.9
Trail Running	56.0%	2.6
Bicycling - Paved Road	54.6%	2.5
Bicycling - Single Track	53.0%	2.4
Camping (Away from Car)	46.8%	2.2
Bicycling - Dirt Road	42.6%	2.0
Backpacking	42.1%	1.9
Canoeing	34.0%	1.6
Car Camping	27.9%	1.3
Fly-Fishing	25.6%	1.2
Rafting	21.4%	1.0
Kayaking - Recreation/St-on-Top	16.2%	0.745
Kayaking - Touring/Sea	13.8%	0.635
Cross-Country/Nordic Skiing	13.4%	0.616
Bird Watching	12.0%	0.544
Climbing - Ice	10.6%	0.488
Telemark Skiing	10.6%	0.487
Showshoeing	6.3%	0.290
Kayaking - Whitewater	3.0%	0.138

ARTIFICIAL WALL CLIMBING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:

A surge in artificial wall climbing participation experienced in 2002 is not sustained in 2003. However, the population remains higher than in 2001 and more than natural rock climbers in 2003.

Short-term Perspective (Compared to 2002):.

Participant levels in 2003 fell 17% from 2002 to a population of 6.4 million American 16 and older.

While Enthusiast activity in artificial wall climbing remains constant – slightly more than one million Americans – the level at which enthusiasts are participating dropped in 2003. Although Enthusiasts are still climbing above average number of times, the population stays the same.

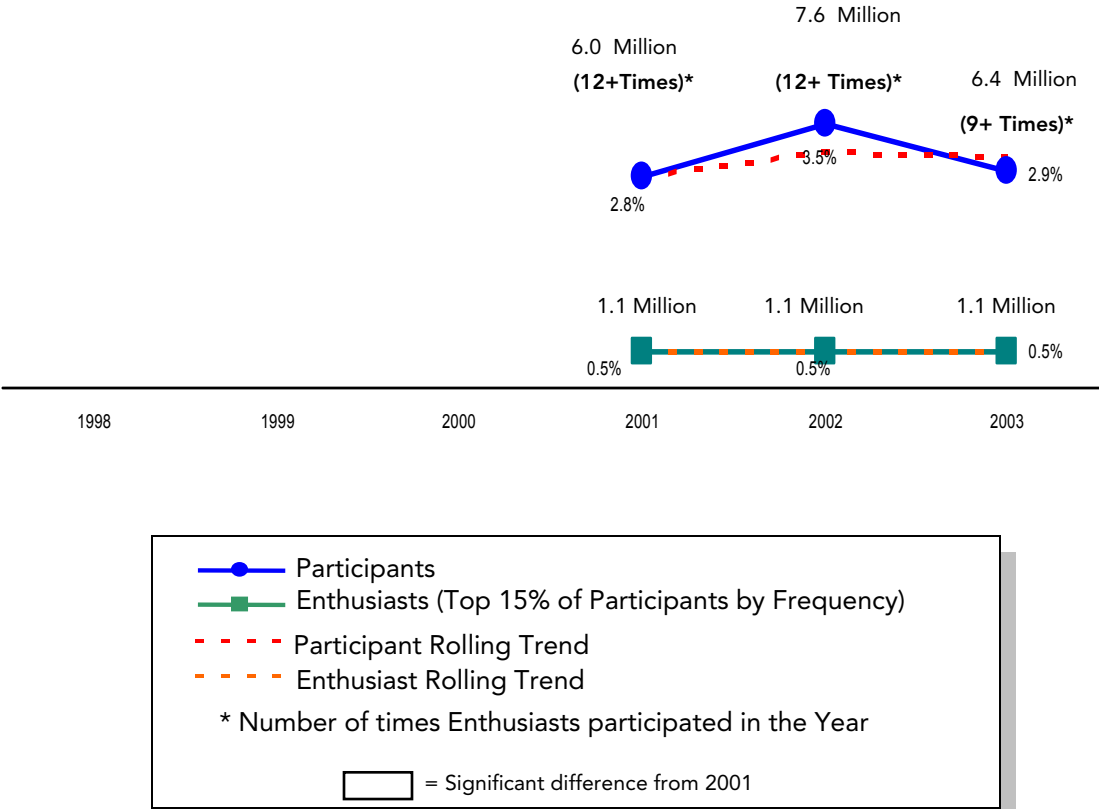
Three-Year Perspective (Compared to 2001):

In 2003, Participant and Enthusiast levels are aligned with 2001 levels.

Cumulative Perspective (Rolling Trend):

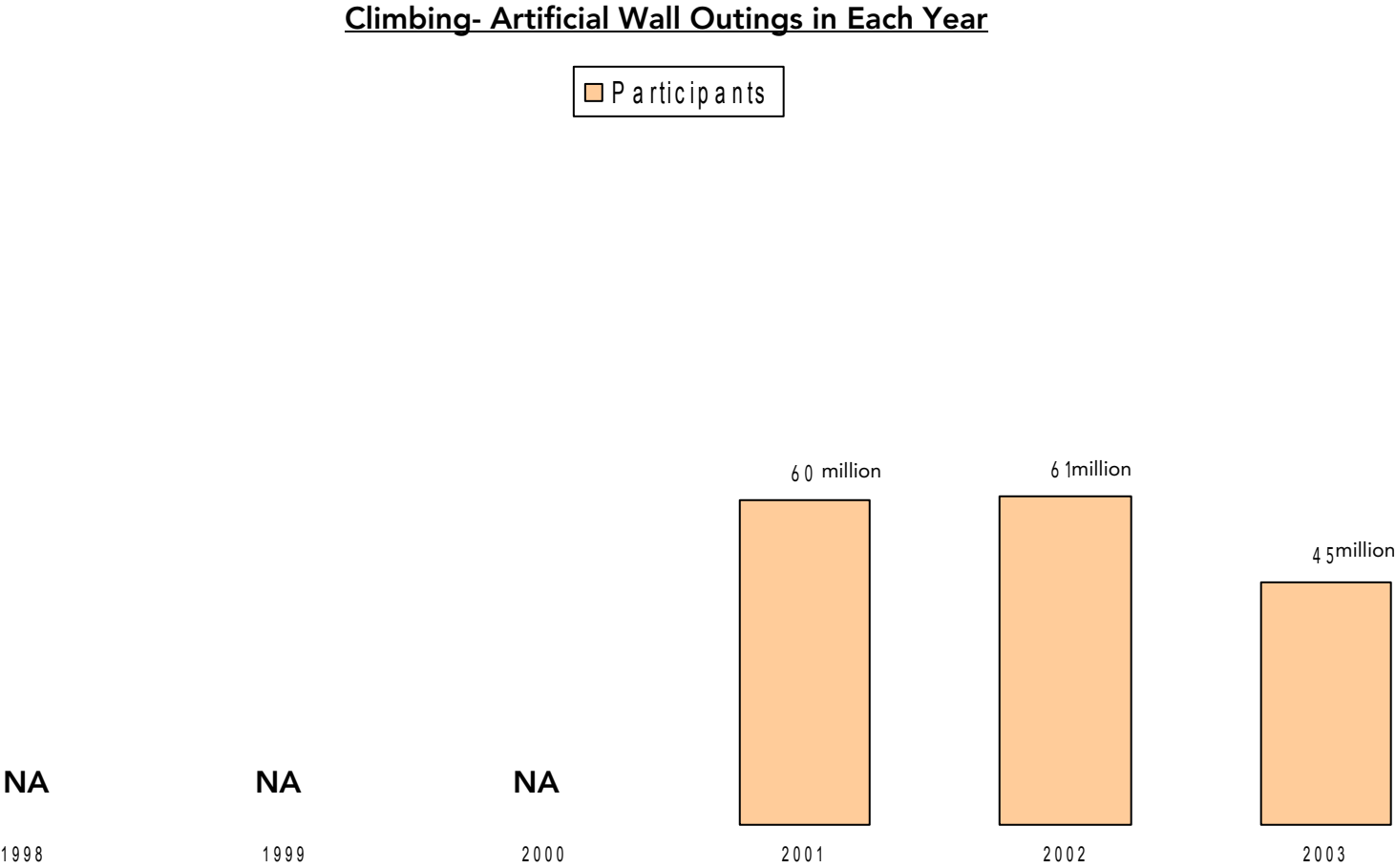
Rolling trend Participant and Enthusiast levels have remained primarily stable over the past three years.

Participation in Artificial Wall Climbing
% of U.S. Population Age 16 and Older



ARTIFICIAL WALL CLIMBING TOTAL NUMBER OF OUTINGS PER YEAR*

Americans 16 and older generated a total of 45 million artificial wall climbing outings in 2003. The decline in the number of artificial wall climbing outings in 2003 is the result of fewer Americans 16 and older participating in the activity and a decline in the number of times Participants went climbing on an artificial wall.

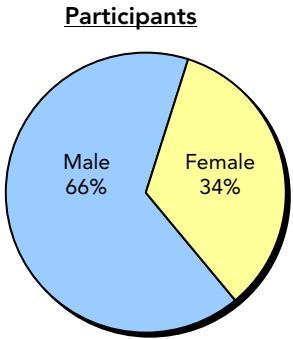


*Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went artificial wall climbing each year

Outdoor Industry Association © 2004

ARTIFICIAL WALL CLIMBING DEMOGRAPHIC PROFILE IN YEAR 2003

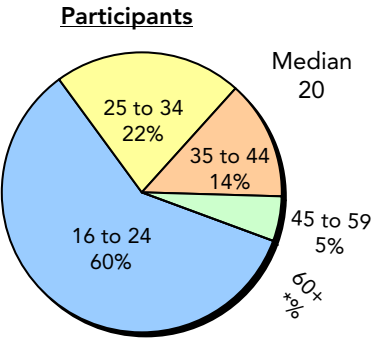
GENDER



Enthusiasts

NA

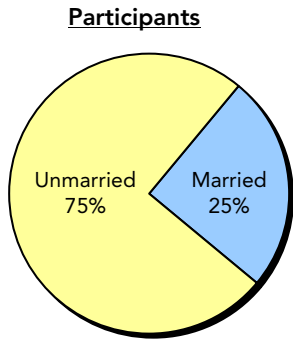
AGE



Enthusiasts

NA

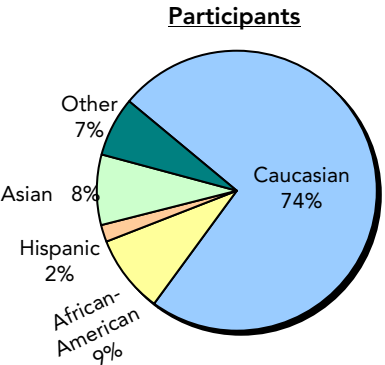
MARITAL STATUS



Enthusiasts

NA

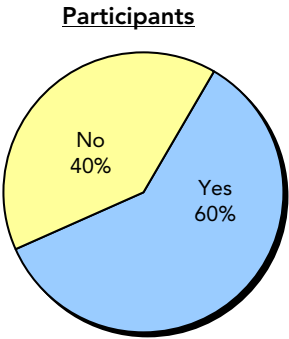
ETHNICITY



Enthusiasts

NA

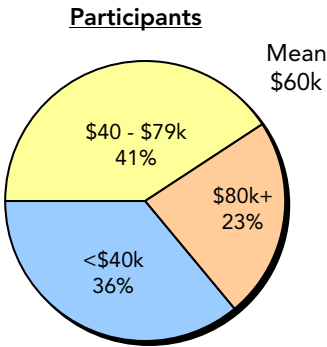
PRESENCE OF CHILDREN <18 in HOUSEHOLD



Enthusiasts

NA

HOUSEHOLD INCOME



Enthusiasts

NA

ARTIFICIAL WALL CLIMBING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- Nearly two-thirds (66%) of Americans who climbed on an artificial wall in 2003 are male – a gender composition similar to previous years.
- Artificial wall climbing activity is strongly linked to age. In year 2003 Americans between the ages of 16 to 24 comprise nearly two-thirds (60%) of the artificial wall climbing Participant population.
- African-Americans continue to represent a measurable portion of the artificial wall climbing population – one in 10 (9%) year 2003 Participants are African-American.

<u>Dimension</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>
<u>Gender</u>						
Male	NA	NA	NA	64%	65%	66%
Female	NA	NA	NA	36%	35%	34%
<u>Age</u>						
16 to 24	NA	NA	NA	60%	52%	60%
25 to 34	NA	NA	NA	21%	17%	22%
35 to 44	NA	NA	NA	14%	19%	14%
45+	NA	NA	NA	5%	12%	5%
<u>Marital Status</u>						
Married	NA	NA	NA	29%	33%	25%
Unmarried	NA	NA	NA	71%	67%	75%
<u>Ethnicity</u>						
Caucasian	NA	NA	NA	76%	84%	74%
African-American	NA	NA	NA	8%	8%	9%
Hispanic	NA	NA	NA	6%	3%	2%
Asian	NA	NA	NA	6%	4%	8%
<u>Children <18</u>						
Yes	NA	NA	NA	47%	54%	60%
<u>Household Income</u>						
<\$40k	NA	NA	NA	45%	34%	36%
\$40k - \$79k	NA	NA	NA	36%	30%	41%
\$80k+	NA	NA	NA	19%	36%	23%
<u>Region</u>						
Northeast	NA	NA	NA	18%	21%	18%
South Central	NA	NA	NA	28%	30%	35%
North Central	NA	NA	NA	18%	25%	24%
West	NA	NA	NA	37%	24%	24%

ARTIFICIAL WALL CLIMBING CROSSOVER ACTIVITY IN YEAR 2003

During 2003 artificial wall climbers report crossover participation in a variety of other activities.

The three activities that the majority of artificial wall climbers participated in during 2003 include hiking (69.6%), paved road bicycling (65.1%) and trail running (59.8%).

Year 2003 Participants did not limit their climbing activity to natural rock surface – nearly one-half (44.6%) of Participants also took their climbing activity outside to natural rock surface (2.9 million Americans 16 and older). Crossover participation in ice climbing is more moderate among year 2003 artificial wall climbers – most likely due to the increased technical and accessibility demands of that activity. In 2003 467 thousand artificial wall climbers also went ice climbing.

Activities	Artificial Wall Climbers - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Climbing - Artificial Wall	100.0%	6.4
Hiking	69.6%	4.5
Bicycling - Paved Road	65.1%	4.1
Trail Running	59.8%	3.8
Bicycling - Single Track	48.7%	3.1
Climbing - Natural Rock	44.6%	2.9
Bicycling - Dirt Road	42.6%	2.7
Camping (Away from Car)	36.2%	2.3
Canoeing	32.9%	2.1
Car Camping	30.7%	2.0
Backpacking	24.1%	1.6
Kayaking - Recreation/St-on-Top	18.2%	1.2
Rafting	14.7%	0.941
Fly-Fishing	13.0%	0.832
Cross-Country/Nordic Skiing	12.3%	0.787
Telemark Skiing	10.5%	0.672
Bird Watching	10.2%	0.640
Kayaking - Touring/Sea	7.7%	0.493
Climbing - Ice	7.3%	0.467
Showshoeing	6.9%	0.442
Kayaking - Whitewater	5.2%	0.333

ICE CLIMBING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective: A spike in ice climbing participation experienced in 2002 is not sustained in 2003.

Short-term Perspective (Compared to 2002): Following a spike in activity in 2002, year 2003 ice climbing Participant levels are down 73% to a population of 659 thousand ice climbers.

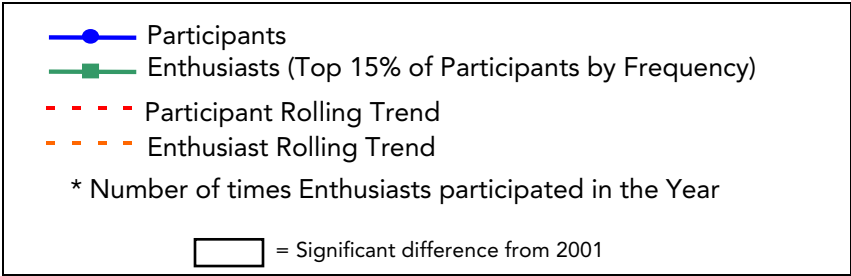
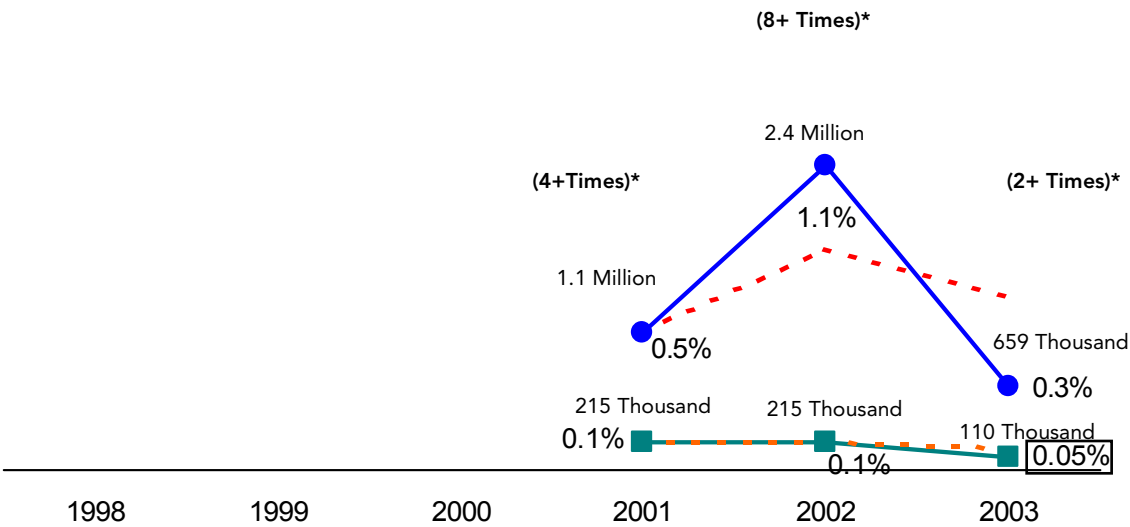
Enthusiast activity declined by 50% in 2003 – revealing a population of 110 thousand Americans 16 and older who went ice climbing two or more times during the year

Three-Year Perspective (Compared to 2001): In 2003, Participant activity returned to 2001 levels, while Enthusiast levels declined.

Cumulative Perspective (Rolling Trend): Rolling trend Participant levels show an increase from 2001, but the trend is strongly influenced by the spike in participation experienced in 2002.

Enthusiast levels have declined moderately over the past three years.

Participation in Ice Climbing
% of U.S. Population Age 16 and Older



ICE CLIMBING PARTICIPANT & ENTHUSIAST TRENDS

- Ice climbing experienced a dramatic decline in participation from 2002 to 2003. Did 2003 signal the start of an erosion in Americans' interest in ice climbing or was the record high level of participation reported in 2002 an aberration.
- Three-year trend analysis reveals that year 2002 may have been a unique year for ice climbing, but that year 2003 participation levels have also dropped below the levels reported in 2001 among many key groups.
- Although down from 2001 levels, participation in ice climbing among young Americans (16 to 34) is up when 2001 participation is compared to 2003 results.
- Future Participation Study Reports will shed light on the true trend of ice climbing among Americans 16 and older.

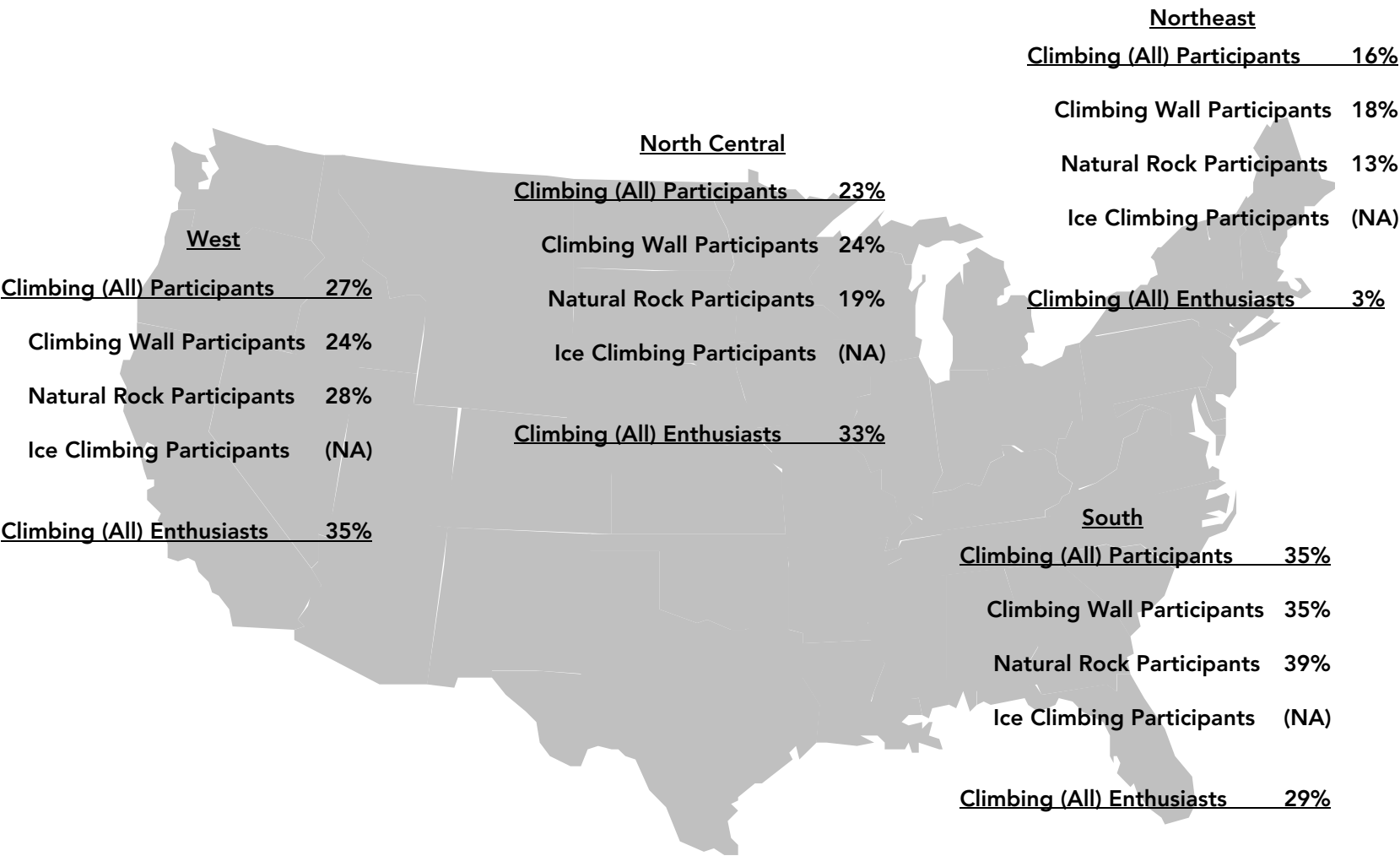
Participation in Ice Climbing

	<u>Ice Climbing Participation Incidence</u>				
<u>Segment</u>	<u>2001</u>	<u>2002</u>	<u>% Change: 2001 to 2002</u>	<u>2003</u>	<u>% Change: 2001 to 2003</u>
Americans 16+	0.5%	1.1%	+120%	0.3%	-40.0%
Males	0.9%	1.5%	+66.7%	0.4%	-56.0%
Females	0.2%	0.6%	+200%	0.2%	No Change
16 to 24	0.1%	2.1%	+2000%	0.7%	+600%
25 to 34	0.1%	0.4%	+300%	0.3%	+200%
35 to 44	0.1%	1.0%	+900%	0.1%	No Change
45+	0.1%	0.5%	+400%	0.1%	No Change
Northeast	0.4%	1.4%	+250%	0.2%	-50%
South	0.5%	0.9%	+80%	0.2%	-60%
North Central	0.1%	0.9%	+800%	0.6%	+500%
West	0.8%	1.2%	+50%	0.2%	-75%

CLIMBING REGIONAL PROFILE YEAR 2003

Overall, the majority of year 2003 climbers (all formats) live in either the South (35%) or West (27%) region of the U.S.

Within the different climbing formats, climbing wall and natural rock climbers are most likely to live in the South, followed by the West.



OUTDOOR RECREATION PARTICIPATION STUDY

CROSS-COUNTRY/NORDIC SKIING

"Have you gone cross-country or Nordic skiing?"

CROSS-COUNTRY/NORDIC SKIING

Headlines

Note: A revision made to the description of Telemark skiing in 2003 may have impacted the trend results for cross-country/Nordic skiing

- Participant levels declined in 2003; the level of Enthusiasts remains aligned with 2002 results
- In 2003, cross-country/Nordic skiing Participants number 9.5 million; Enthusiasts equal a population of 1.5 million
- Participants generated a total of 38 million cross-country/Nordic skiing outings in 2003 – the lowest number in the past three years

The average number of times that Participants went cross-country/Nordic skiing in 2003 is four.

Two-thirds (66%) of Participants went cross-country/Nordic skiing less than the average number of times and 19% went cross-country/Nordic more than average. 23% of Participants went cross-country/Nordic skiing only one time in 2003.

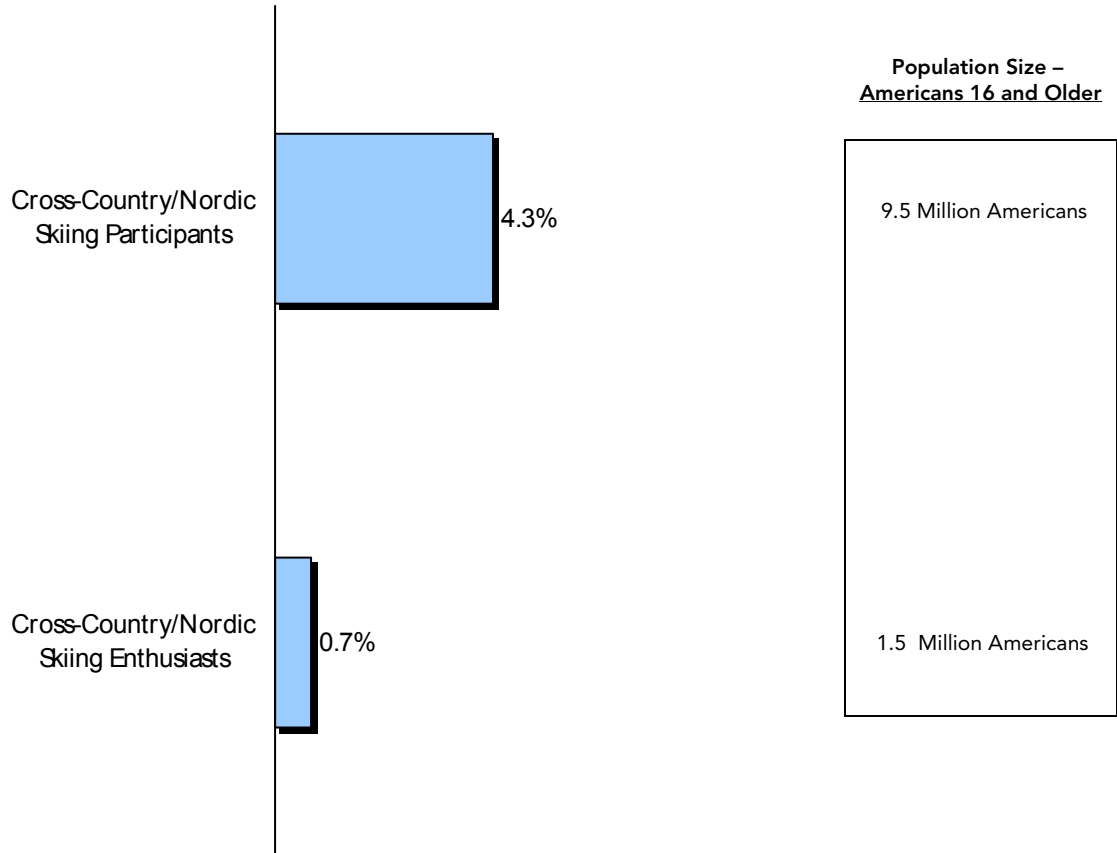
- The cross-country/Nordic skiing population in 2003 is comprised of a greater percentage of males than females
- In 2003, the cross-country Nordic skiing population reflects a higher representation of younger Participants. The median age fell to 35 years from 39.5 in 2001
- Year 2003 cross-country/Nordic skiers are most likely to live in the Northeast and North Central region of the U.S.
- Compared to the overall American population, year 2003 cross-country/Nordic Participants report strong levels of crossover participation in other snowsports – snowshoeing and Telemark skiing

CROSS-COUNTRY/NORDIC SKIING PARTICIPANT & ENTHUSIAST LEVELS IN YEAR 2003

In 2003, nearly 10 million Americans 16 and older went cross-country/Nordic skiing in 2003; 4.3% of the overall American population 16 and older.

A total of 1.5 million Americans 16 and older report cross-country/Nordic skiing at Enthusiast frequency levels during the season – six or more times within the past year.

Participation in Cross-Country/Nordic Skiing
% of U.S. Population Age 16 and Older



CROSS-COUNTRY/NORDIC SKIING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:

Participation in cross-country/Nordic skiing has been wide-ranging over the years, due in part to refinements in the cross-country/Nordic skiing and Telemark skiing definitions.

Short-term Perspective (Compared to 2002):

Nearly 10 million Americans report cross country/Nordic skiing activity in 2003 – activity levels down from 2002.

Enthusiast levels remained primarily flat in 2003 – 1.5 million Americans 16 and older who went cross-country/Nordic skiing eight or more times.

Three-Year Perspective (Compared to 2001):

In 2003, participation in cross-country/Nordic skiing is lower than the level of participation reported in 2001.

Enthusiast levels have also declined when compared to 2001.

Long-term Perspective (Compared to 1998):

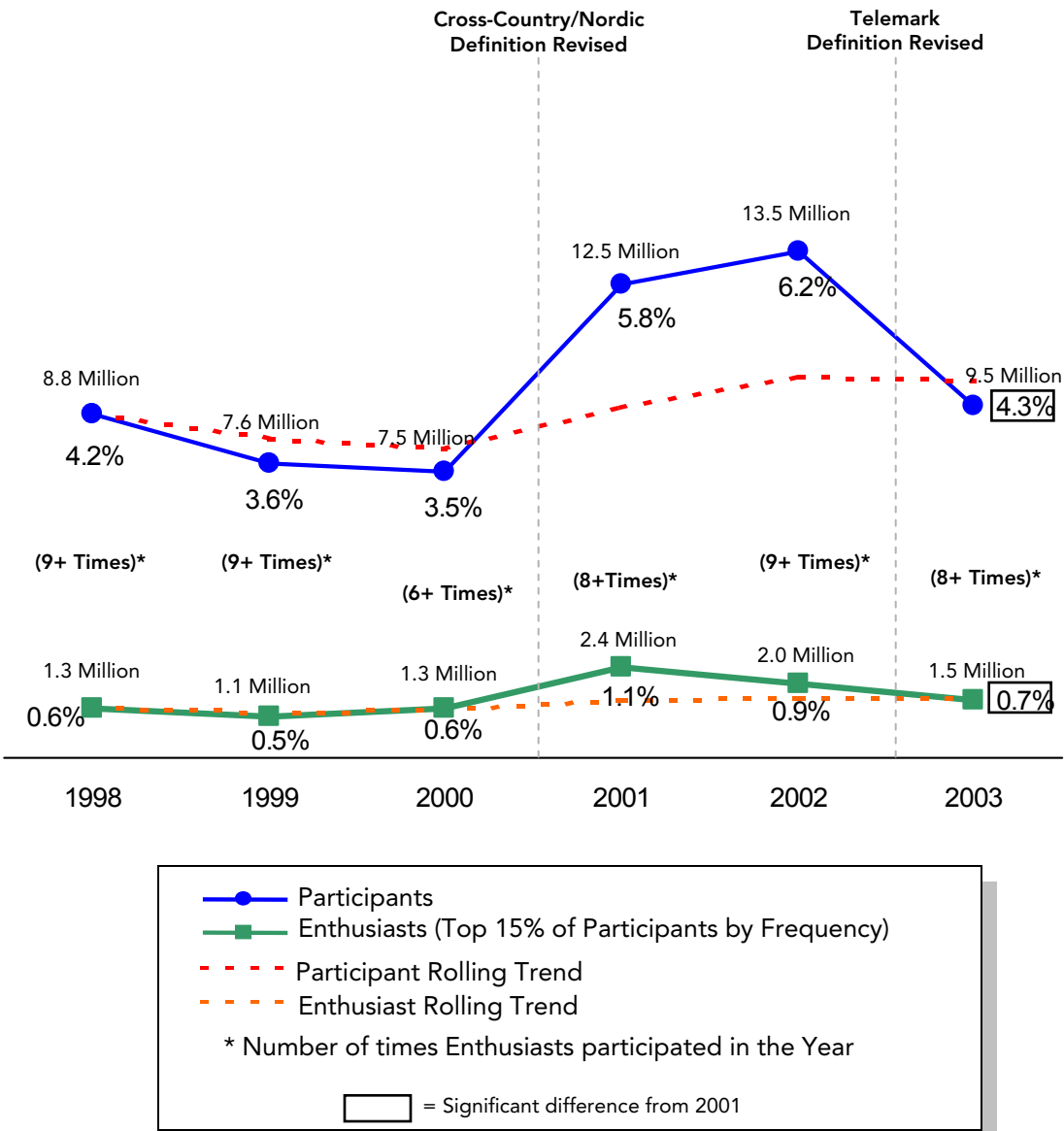
Participant and Enthusiast levels are in alignment with the levels reported six years ago.

The frequency of Enthusiast participation is steady and shows a committed core of consumers.

Cumulative Perspective (Rolling Trend):

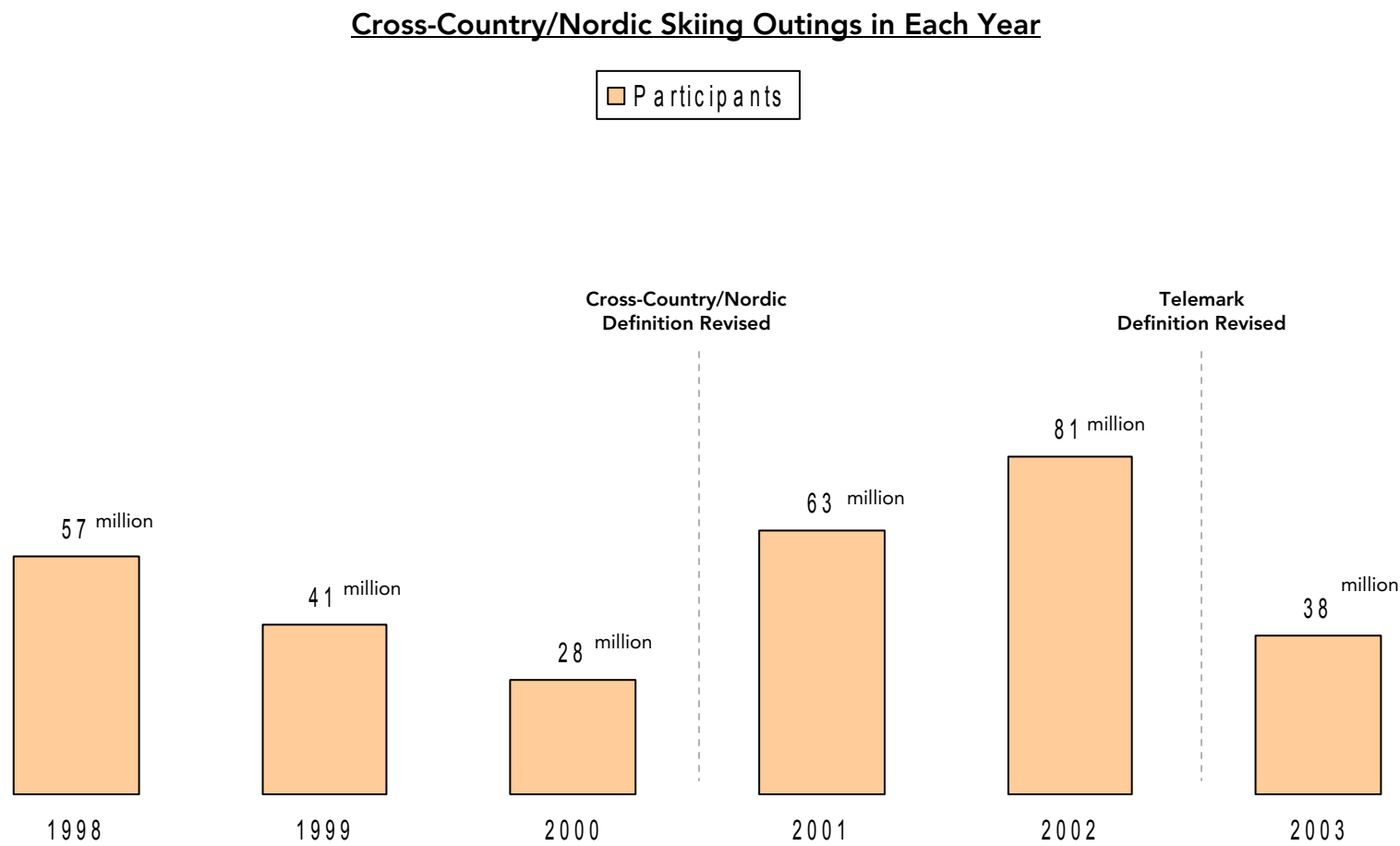
Rolling trend results in Participant levels show a modest increase over the past six years and Enthusiast levels have remained primarily stable.

Participation in Cross-Country/Nordic Skiing
% of U.S. Population Age 16 and Older



CROSS-COUNTRY/NORDIC SKIING TOTAL NUMBER OF OUTINGS PER YEAR*

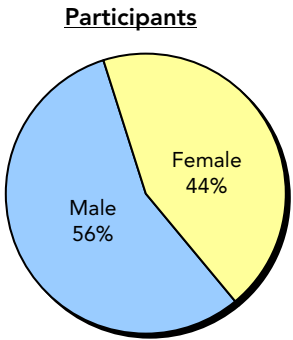
Americans 16 and older generated a total of 43 million cross-country/Nordic skiing outings during 2003. The low number of outings generated in 2003 is the result of the declining size of the Participant population and a decline in the average number of outings during the season.



* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went cross/country/Nordic skiing each year

CROSS-COUNTRY/NORDIC SKIING DEMOGRAPHIC PROFILE

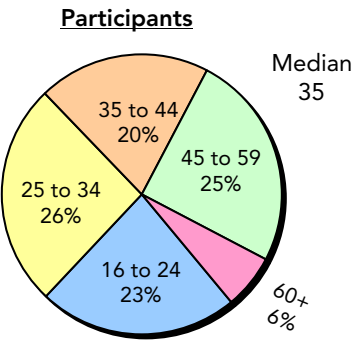
GENDER



Enthusiasts

NA

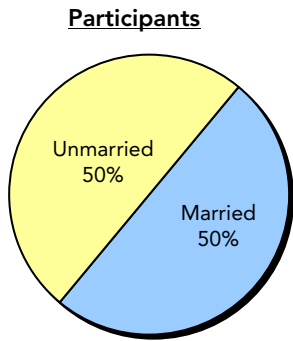
AGE



Enthusiasts

NA

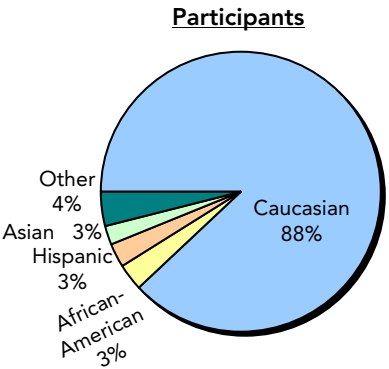
MARITAL STATUS



Enthusiasts

NA

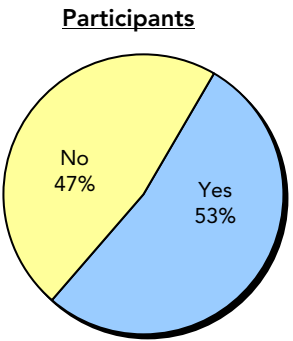
ETHNICITY



Enthusiasts

NA

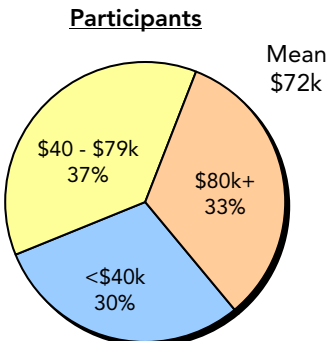
PRESENCE OF CHILDREN <18 in HOUSEHOLD



Enthusiasts

NA

HOUSEHOLD INCOME



Enthusiasts

NA

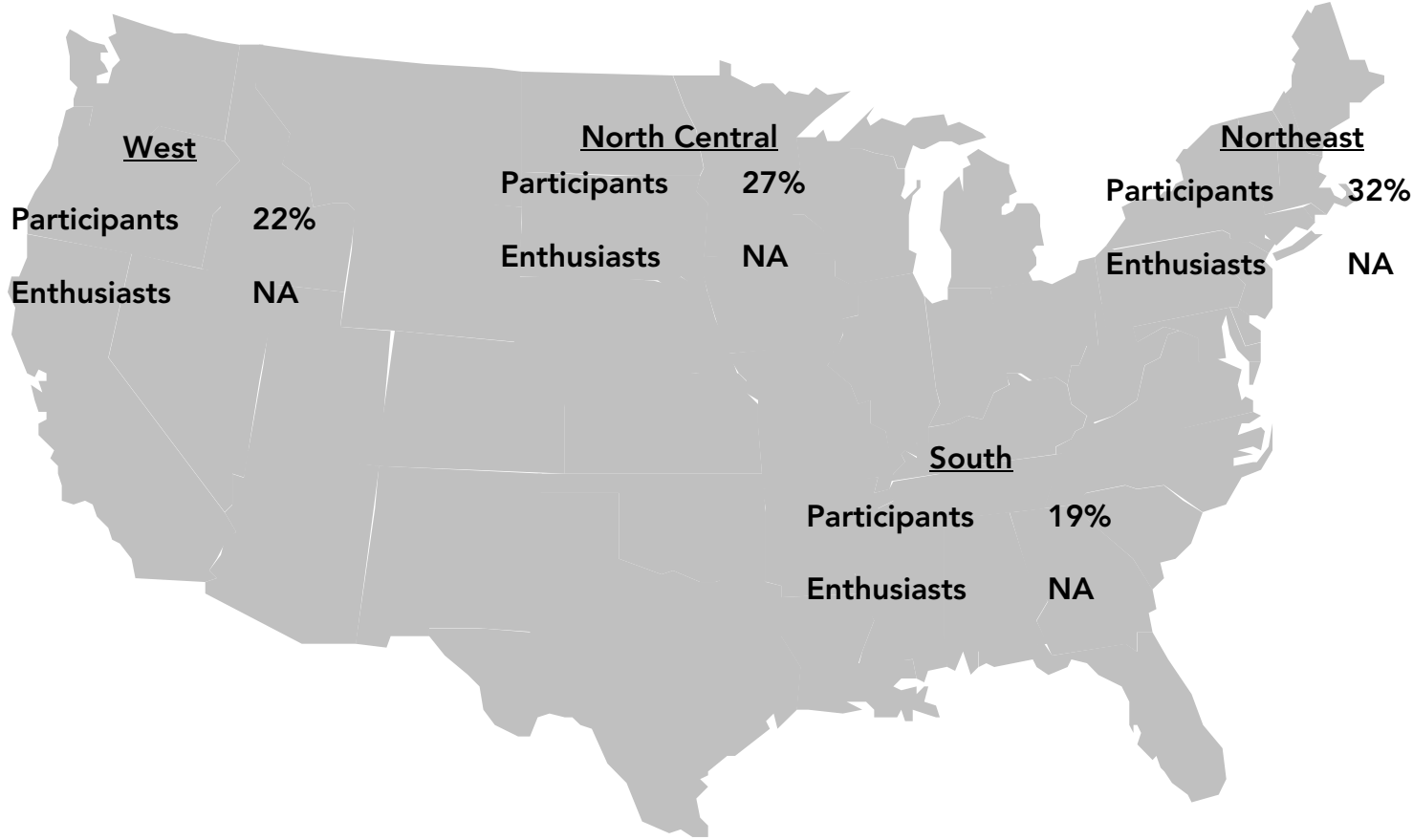
CROSS-COUNTRY/NORDIC SKIING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- In an extension of a five year trend, year 2003 cross-country/Nordic skiers are slightly more likely to be male (56%) than female (44%).
- Similar to previous populations, the age profile of 2003 cross-country/Nordic skiers is balanced, with a strong representation of Participants of all ages. Compared to 2001, cross-country/Nordic skiing attracted a younger population of Participants in 2003. The median age of year 2003 Participants is 35 years – younger than in 2001 by nearly five years (39.5 median age).
- In 2003, cross-country/Nordic skiing benefited primarily from the participation of Caucasian Americans (88%).

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	48%	50%	55%	55%	54%	56%
Female	52%	50%	45%	45%	46%	44%
Age						
16 to 24	30%	19%	29%	27%	28%	23%
25 to 34	11%	17%	17%	23%	18%	26%
35 to 44	21%	24%	22%	22%	24%	20%
45+	38%	40%	32%	28%	30%	31%
Marital Status						
Married	46%	55%	43%	48%	51%	50%
Unmarried	54%	45%	57%	52%	49%	50%
Ethnicity						
Caucasian	94%	90%	89%	92%	86%	88%
African-American	5%	2%	5%	2%	5%	3%
Hispanic	0%	3%	0%	3%	5%	3%
Asian						
Children <18						
Yes	41%	32%	44%	39%	45%	53%
Household Income						
<\$40k	NA	21%	22%	29%	24%	30%
\$40k - \$79k	NA	31%	51%	45%	41%	37%
\$80k+	NA	30%	27%	26%	35%	33%
Region						
Northeast	29%	23%	12%	36%	34%	32%
South Central	14%	11%	16%	8%	13%	19%
North Central	18%	35%	44%	28%	30%	27%
West	40%	31%	29%	28%	24%	22%

CROSS-COUNTRY/NORDIC SKIING REGIONAL PROFILE - YEAR 2003

In 2003, the Northeast (32%) and North Central (27%) regions of the U.S. are the areas in which cross-country/Nordic skiers are most likely to live.



CROSS-COUNTRY/NORDIC SKIING CROSSOVER ACTIVITY IN YEAR 2003

Cross-country/Nordic skiers report strong levels of crossover participation in other human powered activities in 2003.

Hiking (71.5%) and paved road bicycling (60.4%) are the two activities in which the majority of cross-country/Nordic skiers participated in during 2003.

Cross-country/Nordic skiers also devoted time and effort to trail running (43.6%), dirt road bicycling (40.3%), car camping (37.9%) and single track bicycling (37.9%) during the year.

Other snow activities are also popular among cross-country/Nordic skiers – participating in snowshoeing (21.3%) and Telemark skiing (9.2%) at above average levels.

Activities	Cross Country/Nordic Skiers Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Cross-Country/Nordic Skiing	100.0%	9.5
Hiking	71.5%	6.8
Bicycling - Paved Road	60.4%	5.7
Trail Running	43.6%	4.1
Bicycling - Dirt Road	40.3%	3.8
Car Camping	37.9%	3.6
Bicycling - Single Track	37.9%	3.6
Canoeing	29.3%	2.8
Camping (Away from Car)	23.4%	2.2
Snowshoeing	21.3%	2.0
Fly-Fishing	21.1%	2.0
Backpacking	19.2%	1.8
Bird Watching	14.0%	1.3
Rafting	13.3%	1.3
Kayaking - Recreation/St-on-Top	11.8%	1.1
Telemark Skiing	9.2%	0.878
Kayaking - Touring/Sea	8.2%	0.779
Climbing - Artificial Wall	8.2%	0.787
Climbing - Natural Rock	6.5%	0.616
Kayaking - Whitewater	3.8%	0.361
Climbing - Ice	1.2%	0.114

OUTDOOR RECREATION PARTICIPATION STUDY

FLY-FISHING

“Have you gone fly-fishing? That is fishing with a rod and reel specifically designed for fly-fishing. Please consider that fly-fishing is different than spin-cast fishing where you might use live bait.”

FLY-FISHING

Headlines

- Fly-fishing activity remains flat in 2003 when compared to 2002, revealing a population of nearly **13 million** Participants that is back in reach of the record large 2001 population
- Year 2003 Enthusiast levels remained unchanged from 2002 - a population of 2 million Americans 16 and older

Participants went fly-fishing an average of 12 times in 2003.

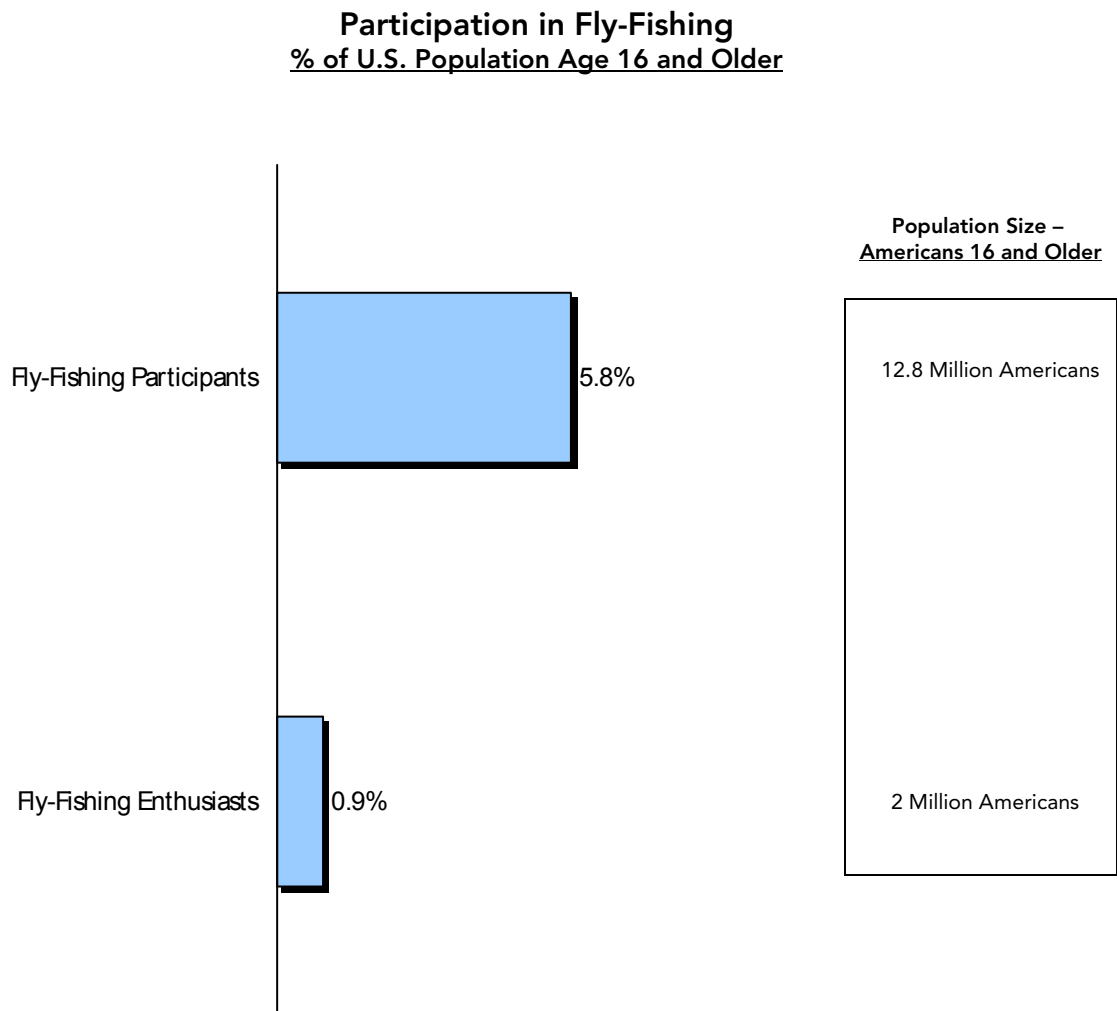
81% of Participants went fly-fishing less than the average number of times (one to 11 outings) and 11% went fly-fishing more than average. Nearly one in five (17%) Participants went fly-fishing only one time in 2003

- Participants generated a total of 154 million fly-fishing outings in 2003; 108 million outings were sourced by Enthusiasts
- Fly-fishing activity is sourced primarily by males in 2003
- As a population, year 2003 Participants tend to be older than the group of Americans who participated in 2001
- Overall, fly-fishermen live primarily in the South, followed by residence in the West
- During 2003 fly-fishermen report high levels of crossover participation in a range of activities that include hiking, car camping, and bicycling of all types

FLY-FISHING PARTICIPANT & ENTHUSIAST LEVELS IN YEAR 2003

During 2003, nearly 13 million Americans 16 and older went fly-fishing at least one time; equal to 5.8% of the overall American population 16 and older.

The number of Americans who went fly-fishing at Enthusiast levels (15 or more times) in 2003 is equal to 2 million fly-fishermen.



FLY-FISHING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:
Following an off-year for fly-fishing in 2002, strong levels of participation returned in 2003.

Short-term Perspective (Compared to 2002):
The incidence of Americans 16 and older who went fly-fishing at least one time in 2003 remains primarily unchanged from 2002 levels.

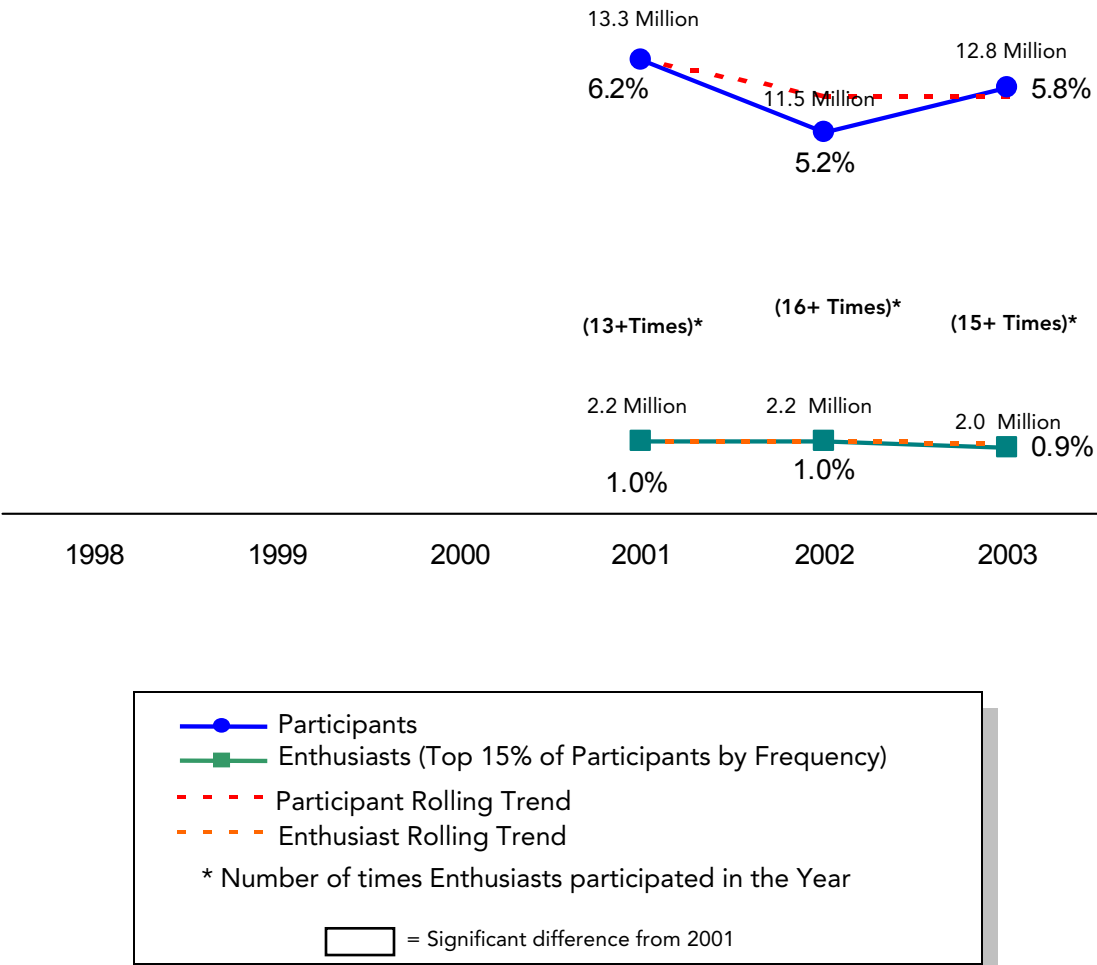
The level of American's who participated in fly-fishing at the most committed frequency levels remains unchanged in 2003.

Three-Year Perspective (Compared to 2001):
In 2003, Participant and Enthusiast levels for fly-fishing are on par with 2001 activity.

Cumulative Perspective (Rolling Trend):
Rolling trend results show a slight decline in Participant levels over the past three years.

Rolling trend Enthusiast levels have remained primarily stable over the past three years.

Participation in Fly-Fishing
% of U.S. Population Age 16 and Older



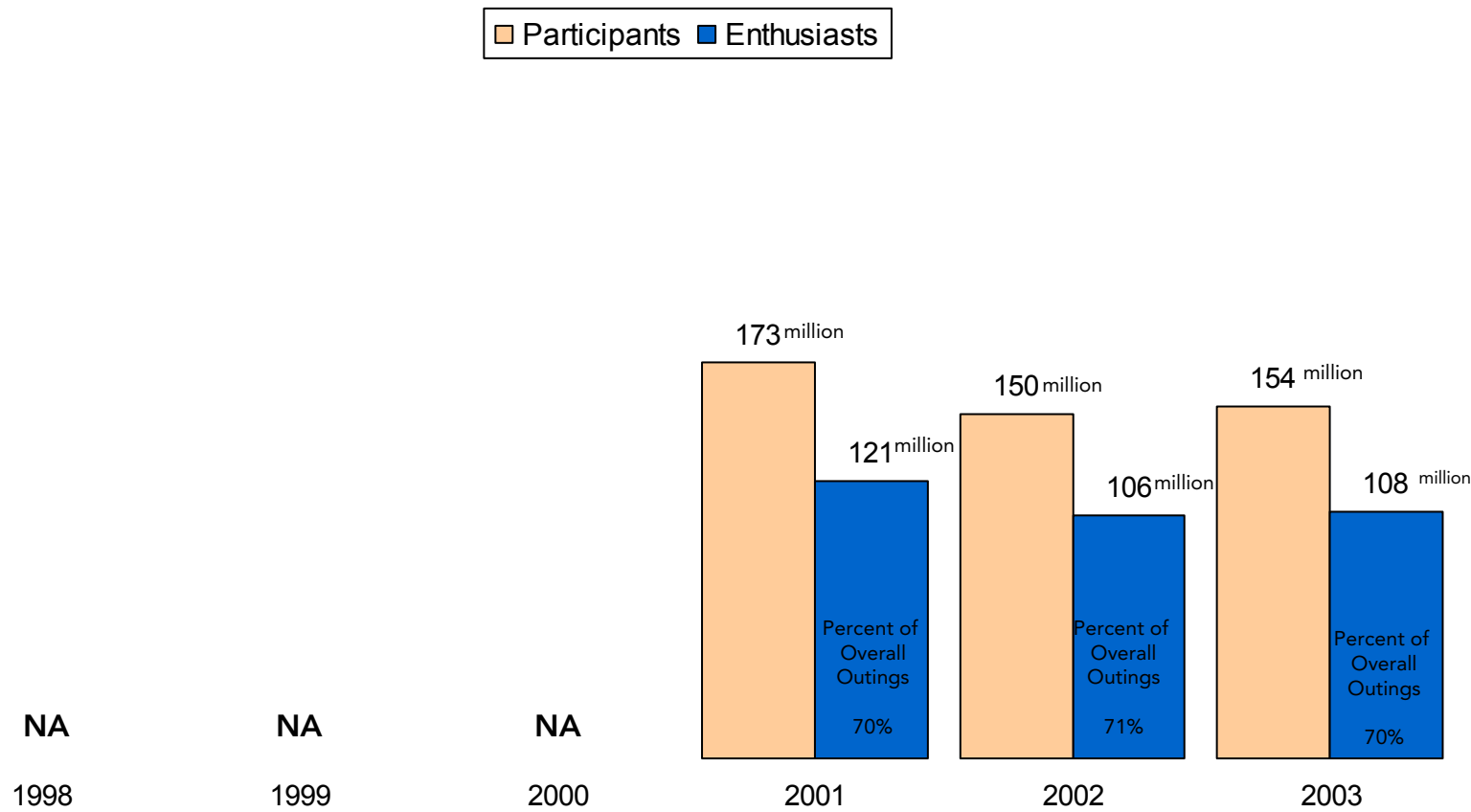
FLY-FISHING TOTAL NUMBER OF OUTINGS PER YEAR*

During 2003, fly-fishing Participants generated a total of 154 million fly-fishing outings.

Enthusiasts accounted for 108 million fly-fishing outings during 2003, or nearly three-quarters of the total number of fly-fishing occasions among Americans 16 and older.

Outings in 2003 mirror the number of outings reported in 2002, but both years reveal a decline when compared to 2001.

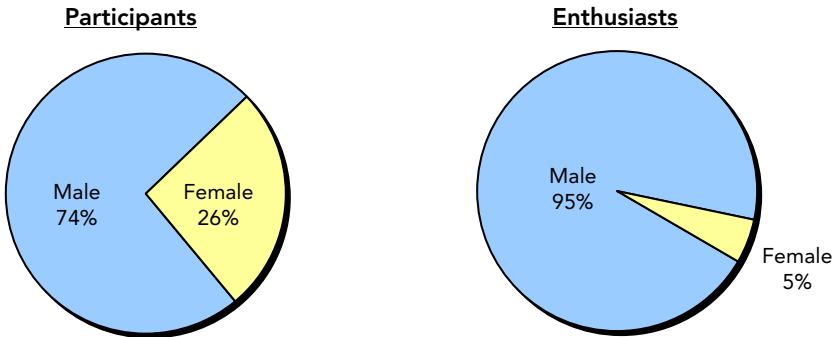
Fly-Fishing Outings in Each Year



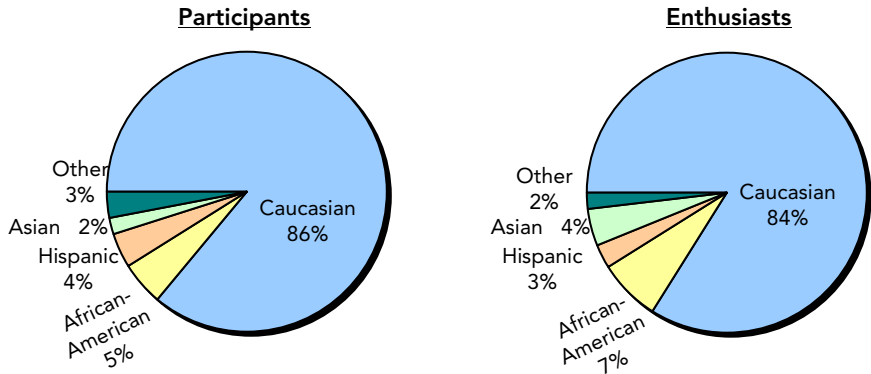
* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went fly-fishing each year

FLY-FISHING DEMOGRAPHIC PROFILE

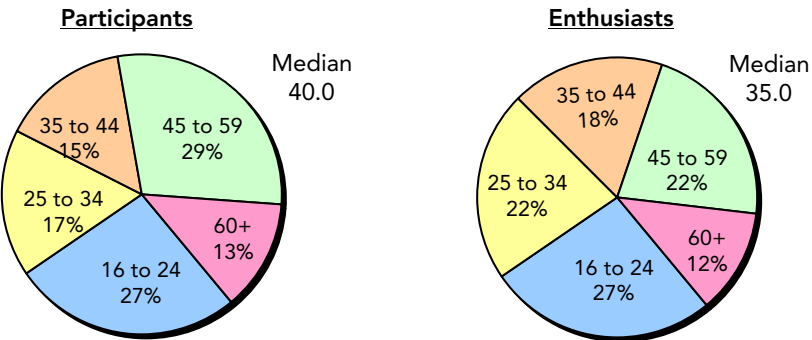
GENDER



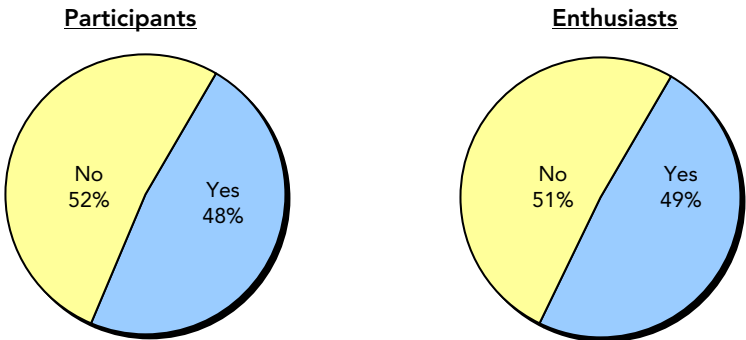
ETHNICITY



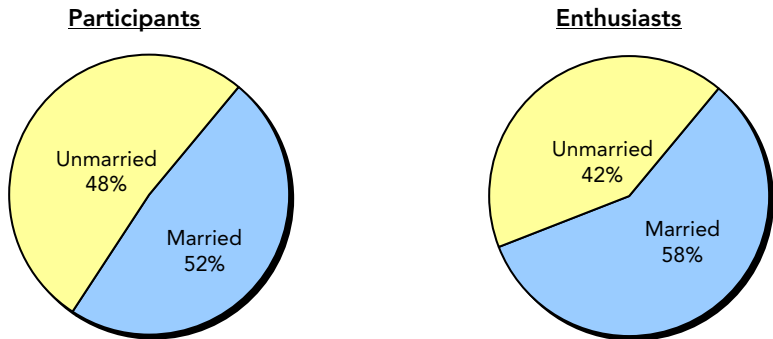
AGE



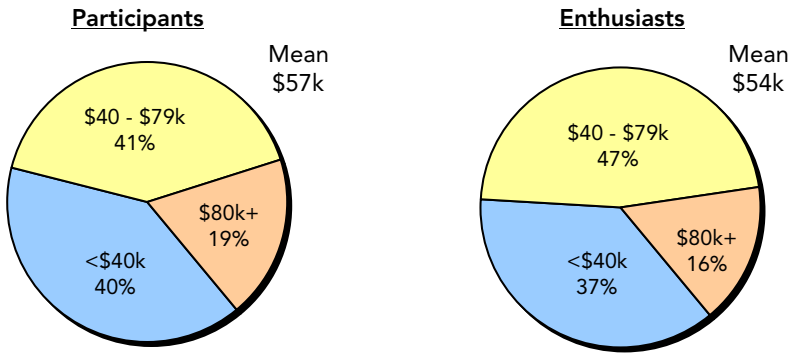
PRESENCE OF CHILDREN <18 in HOUSEHOLD



MARITAL STATUS



HOUSEHOLD INCOME



FLY-FISHING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- Similar to previous years, the 2003 fly-fishing Participant population is primarily male (74%).
- In 2003, Americans who went fly-fishing at least one time tended to be older than in 2002. More than one-half (57%) of year 2003 Participants are 35 years of age or older – compared to 48% of the 2002 Participant population. The median age of year 2003 Participants is 40 years old, older than the 2002 population by more than 10 years (29.5 median age in 2002).
- Nearly nine of 10 (86%) year 2003 Participants are Caucasian, confirming a three year trend.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	NA	NA	NA	75%	70%	74%
Female	NA	NA	NA	25%	30%	26%
Age						
16 to 24	NA	NA	NA	30%	26%	27%
25 to 34	NA	NA	NA	20%	26%	17%
35 to 44	NA	NA	NA	21%	16%	15%
45+	NA	NA	NA	29%	32%	42%
Marital Status						
Married	NA	NA	NA	38%	50%	52%
Unmarried	NA	NA	NA	62%	50%	48%
Ethnicity						
Caucasian	NA	NA	NA	87%	84%	86%
African-American	NA	NA	NA	5%	6%	5%
Hispanic	NA	NA	NA	5%	5%	4%
Asian	NA	NA	NA	*	3%	2%
Children <18						
Yes	NA	NA	NA	40%	42%	48%
Household Income						
<\$40k	NA	NA	NA	47%	39%	40%
\$40k - \$79k	NA	NA	NA	38%	39%	41%
\$80k+	NA	NA	NA	15%	22%	19%
Region						
Northeast	NA	NA	NA	17%	17%	19%
South Central	NA	NA	NA	33%	33%	36%
North Central	NA	NA	NA	21%	23%	20%
West	NA	NA	NA	29%	27%	25%

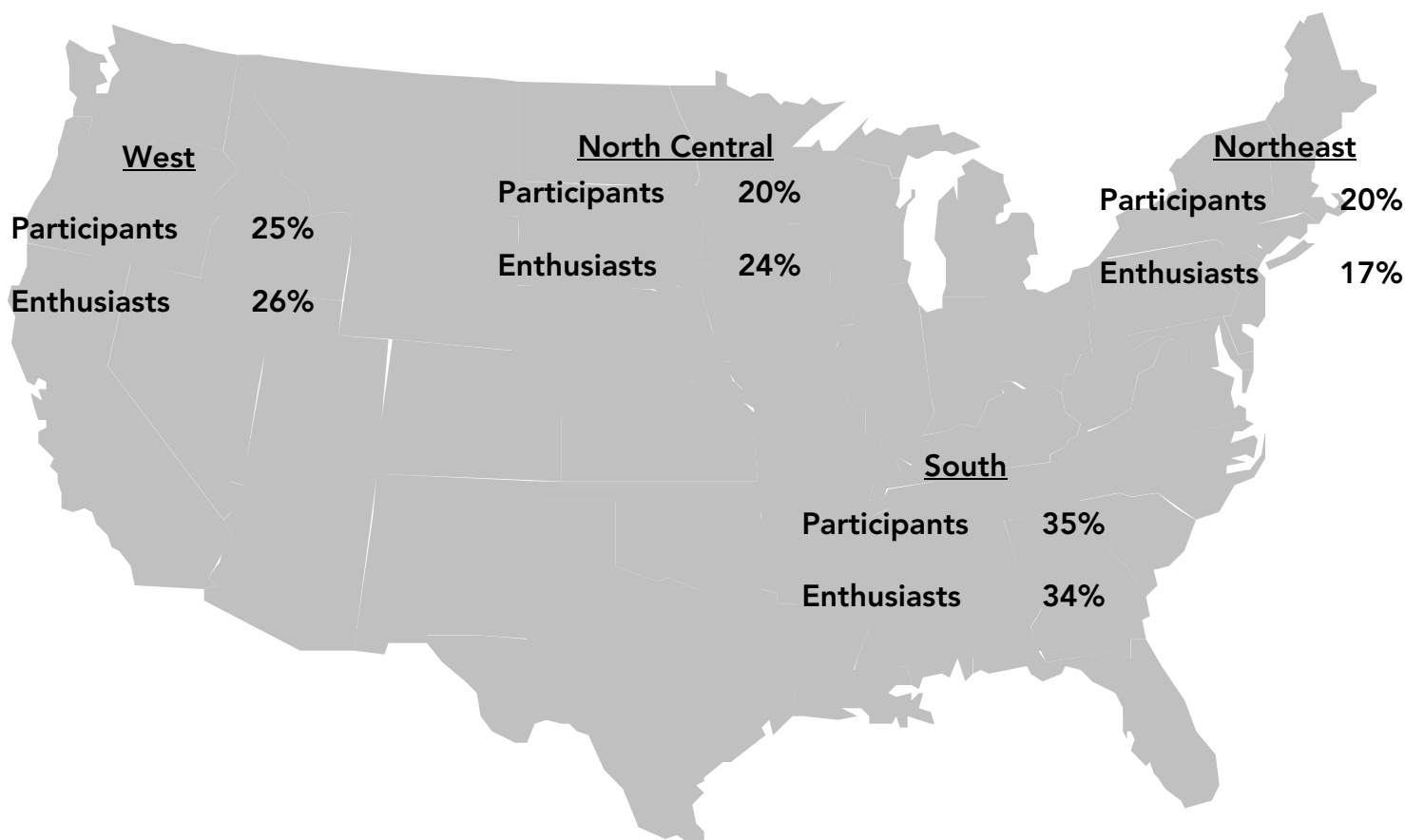
FLY-FISHING DEMOGRAPHIC PROFILE TRENDS OF ENTHUSIASTS

- Following a strong representation of females in 2002, the year 2003 Enthusiast population is comprised nearly universally of males (95%).
- The 2003 Enthusiast population is younger than in 2001. The median age of the 2001 Enthusiast population was 39.5 – a median age that has dropped to 35 years of age in year 2003.
- In a reversal from 2002, one-half (49%) of year 2003 fly-fishing Enthusiasts report the presence of children 18 years of age and younger in their household.

<u>Dimension</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>
<u>Gender</u>						
Male	NA	NA	NA	92%	74%	95%
Female	NA	NA	NA	8%	26%	5%
<u>Age</u>						
16 to 24	NA	NA	NA	18%	28%	27%
25 to 34	NA	NA	NA	24%	31%	22%
35 to 44	NA	NA	NA	29%	15%	18%
45+	NA	NA	NA	29%	26%	34%
<u>Marital Status</u>						
Married	NA	NA	NA	53%	45%	58%
Unmarried	NA	NA	NA	47%	55%	42%
<u>Ethnicity</u>						
Caucasian	NA	NA	NA	87%	83%	84%
African-American	NA	NA	NA	*	1%	7%
Hispanic	NA	NA	NA	11%	6%	3%
Asian	NA	NA	NA	1%	2%	4%
<u>Children <18</u>						
Yes	NA	NA	NA	40%	26%	49%
<u>Household Income</u>						
<\$40k	NA	NA	NA	44%	33%	37%
\$40k - \$79k	NA	NA	NA	47%	37%	47%
\$80k+	NA	NA	NA	9%	30%	16%
<u>Region</u>						
Northeast	NA	NA	NA	11%	15%	17%
South Central	NA	NA	NA	46%	31%	34%
North Central	NA	NA	NA	23%	23%	24%
West	NA	NA	NA	20%	31%	26%

FLY-FISHING REGIONAL PROFILE YEAR 2003

In 2003, fly-fishing Participants (35%) and Enthusiasts (34%) are most likely to live in a state located in the South region.



FLY-FISHING CROSSOVER ACTIVITY IN YEAR 2003

Americans who went fly-fishing in 2003 also participated in a range of other human powered activities at high levels during the year.

Hiking (61.9%) is the activity that fly-fishermen are the most likely to have participated in 2003.

Other activities that fly-fishermen commonly participated in include paved road bicycling (46.2%), car camping (39.3%), single track (36.0%) and dirt road bicycling (34.2%).

Activities	Fly-Fishermen - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Fly-Fishing	100.0%	12.8
Hiking	61.9%	7.9
Bicycling - Paved Road	46.2%	5.9
Car Camping	39.3%	5.0
Bicycling - Single Track	36.0%	4.6
Bicycling - Dirt Road	34.2%	4.3
Canoeing	27.8%	3.6
Trail Running	24.5%	3.1
Camping (Away from Car)	22.5%	2.9
Backpacking	21.5%	2.7
Cross-Country/Nordic Skiing	15.7%	2.0
Bird Watching	16.3%	2.0
Rafting	13.2%	1.7
Climbing - Natural Rock	9.2%	1.2
Snowshoeing	8.9%	1.1
Kayaking - Recreation/St-on-Top	7.5%	1.0
Climbing - Artificial Wall	6.4%	0.932
Telemark Skiing	5.5%	0.710
Kayaking - Touring/Sea	3.8%	0.486
Kayaking - Whitewater	1.9%	0.243
Climbing - Ice	1.9%	0.243

OUTDOOR RECREATION PARTICIPATION STUDY

HIKING

"Have you gone hiking on an unpaved trail?"

HIKING

Headlines

- Hiking Participant and Enthusiast participation levels have not changed since 2002 with populations of **71.6 million** and **10.5 million** respectively.
- The hiking Participant population is one of the most balanced of any of the human powered activities – including Americans of both genders, all ages and affluence levels

The average number of times that Participants went hiking in 2003 is 12.

Most Participants (79%) went hiking less than the average number of times (one to 11 outings) and more than one in 10 (12%) went hiking more than average. 17% Participants went hiking only one time in 2003.

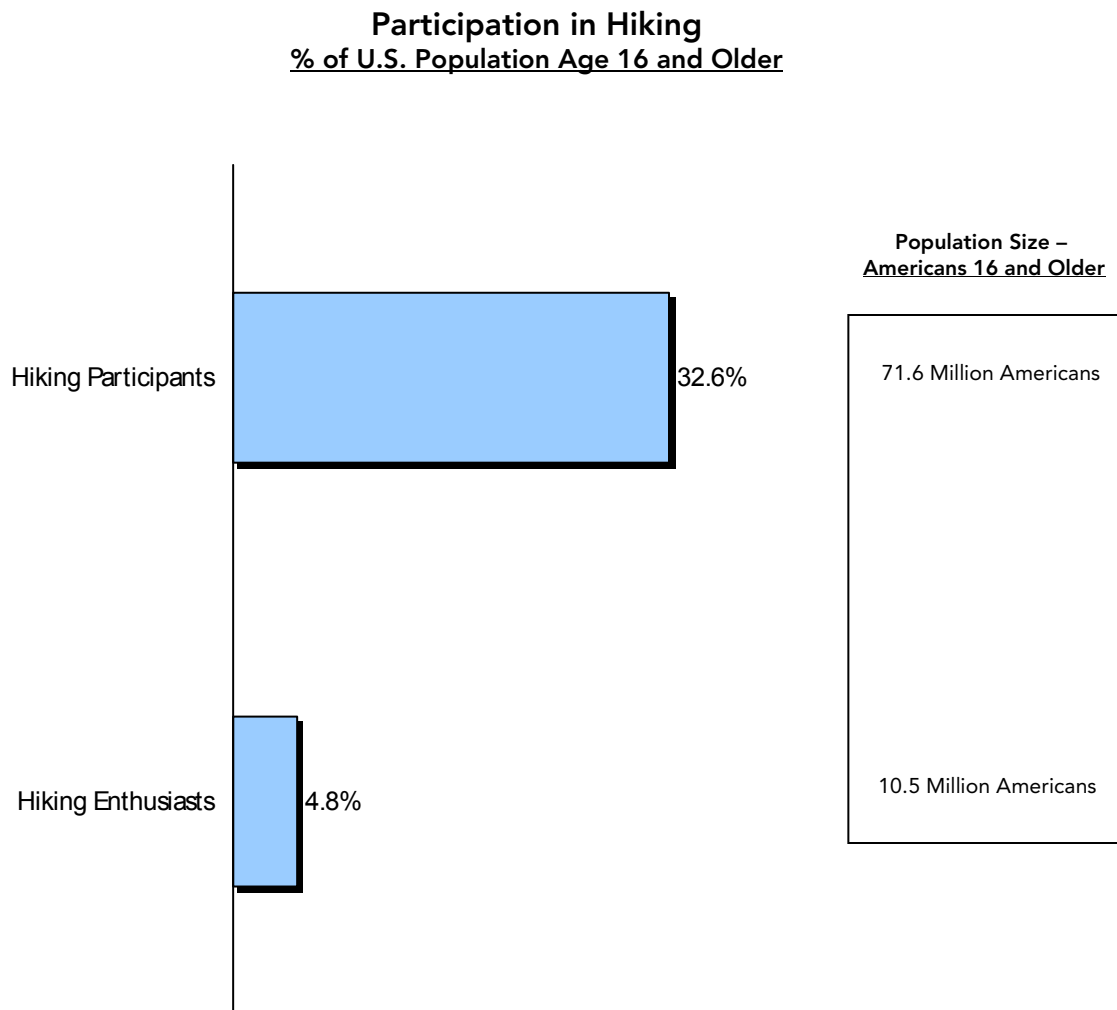
- Participants generated a total of 859 million hiking outings in 2003; 588 million outings were sourced by Enthusiasts
- The 2003 Enthusiast population reflects measurable interest in the activity among younger Americans – nearly one-half of Enthusiasts are between 16 and 34 years old
- Participants are most likely to live in the South and the West regions
- Year 2003 Enthusiasts are most likely to live in the West region
- During 2003, hikers kept active by participating in a limited set of other activities – paved road bicycling and car camping particularly

HIKING PARTICIPANT & ENTHUSIAST LEVELS IN YEAR 2003

Hiking is one of the most popular human powered activities among Americans 16 and older.

During 2003, one-third (32.6%) of Americans 16 and older went hiking on an unpaved trail. This level of participation generates a population of nearly 72 million Participants in 2003.

More than 10 million Americans report hiking at Enthusiast levels (14 or more times) in 2003.



HIKING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:

Consistently involving one-third of the American population, hiking remains one of the most popular human powered activities among Americans 16 and older.

Short-term Perspective (Compared to 2002):

One-third of Americans 16 and older went hiking at least one time in 2003. A participation level that remains unchanged from 2002.

Nearly 11 million Americans went hiking 14 or more times in 2003. This depicts static Enthusiast participation from 2002.

Three-Year Perspective (Compared to 2001):

In 2003, Participant and Enthusiast levels are lower than record high activity that was reported in 2001.

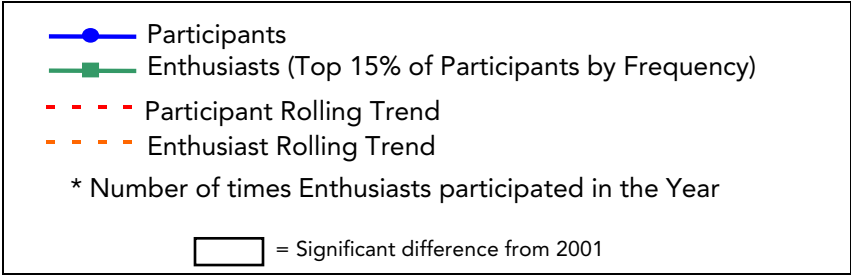
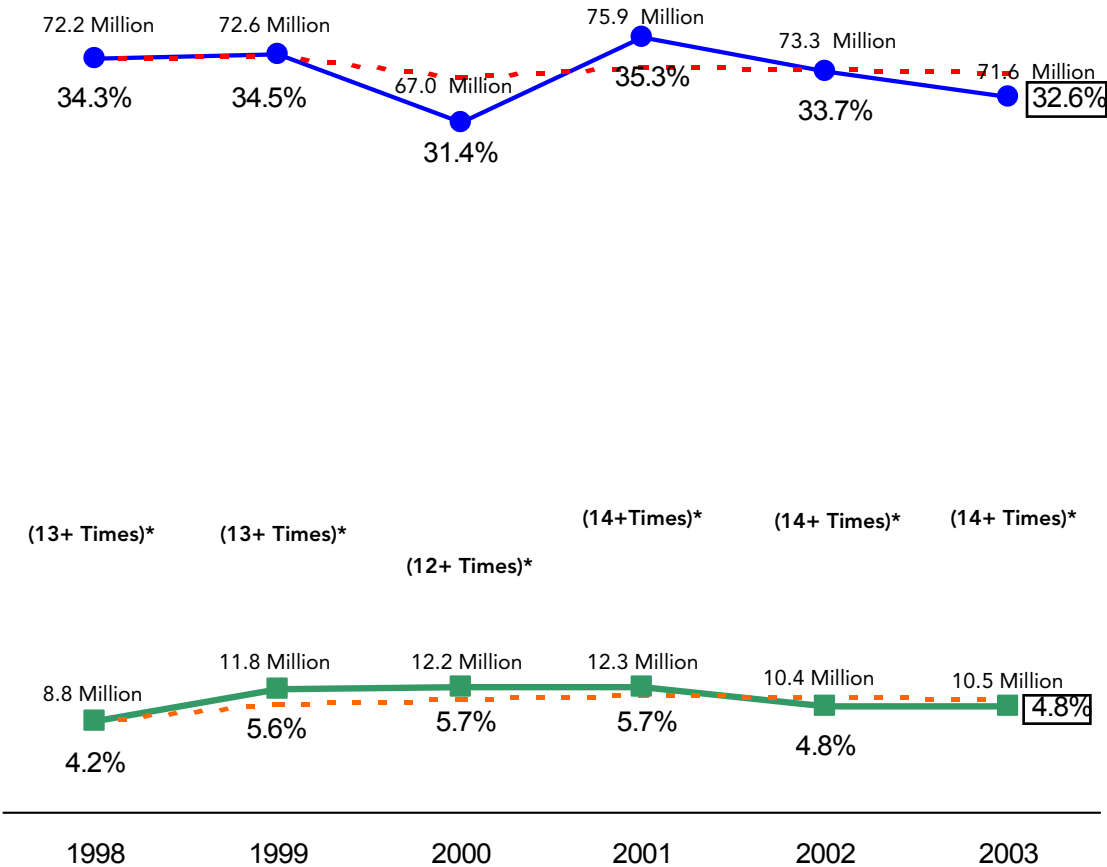
Long-term Perspective (Compared to 1998):

Year 2003 Participant and Enthusiast activity is on par with the levels reported in 1998.

Cumulative Perspective (Rolling Trend):

Rolling trend Participant and Enthusiast levels have remained primarily stable over the past six years.

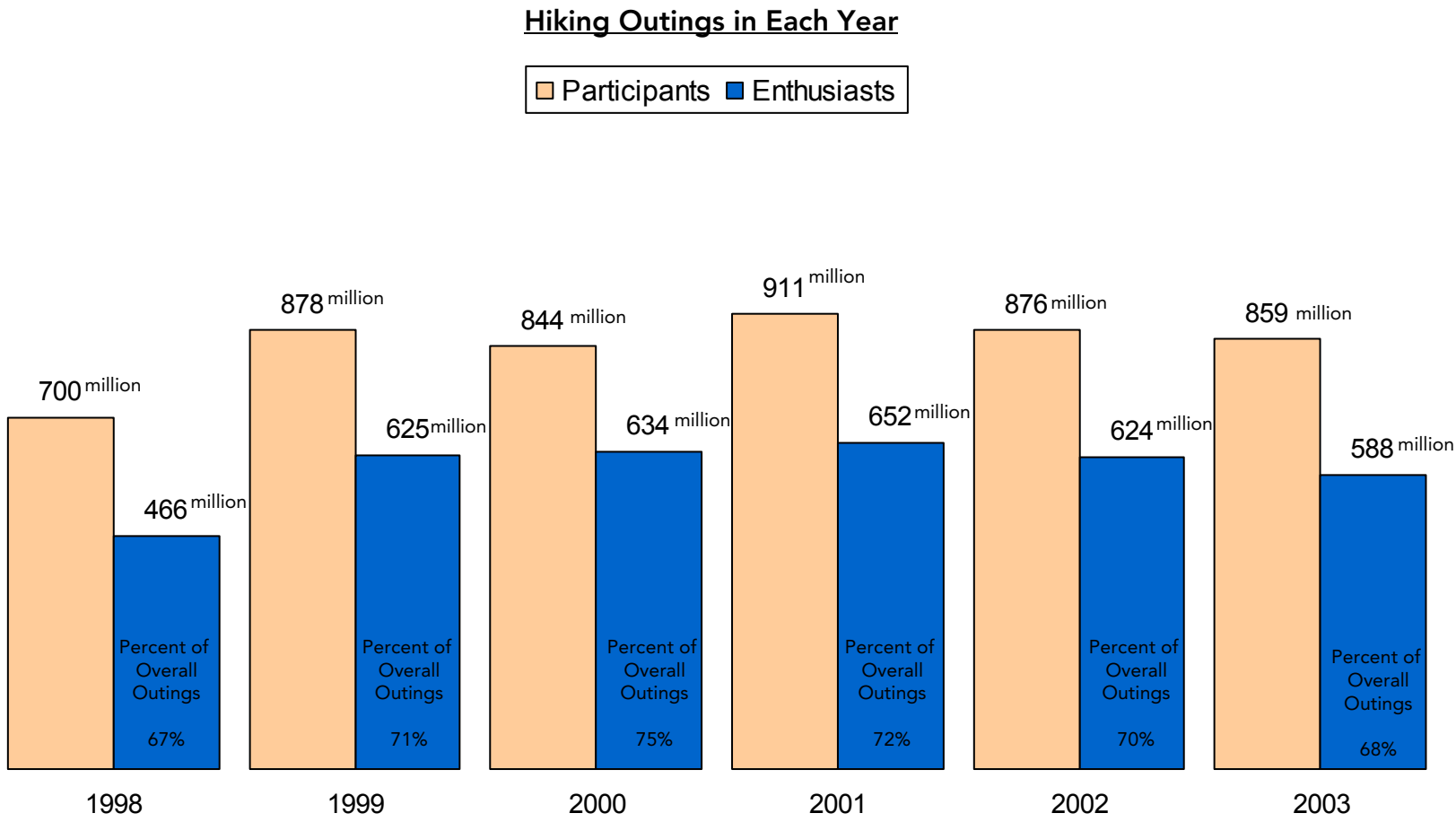
Participation in Hiking
% of U.S. Population Age 16 and Older



HIKING TOTAL NUMBER OF OUTINGS PER YEAR*

Americans 16 and older generated a total of 859 million hiking outings during 2003. Participants over the past three years have reported an identical number of average outings (12).

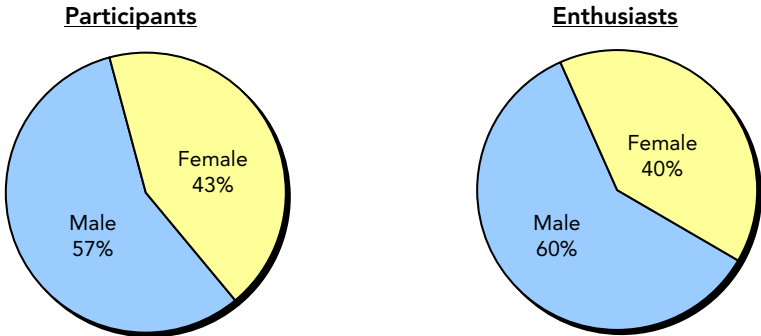
During 2003 Enthusiasts accounted for 588 million hiking outings – the lowest number of outings reported since 1998.



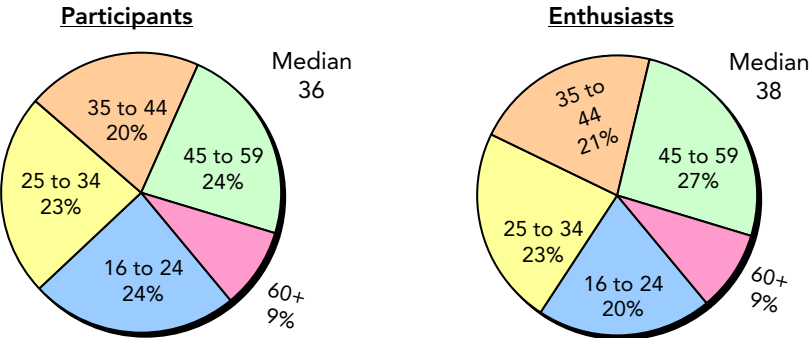
* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went hiking each year

HIKING DEMOGRAPHIC PROFILE

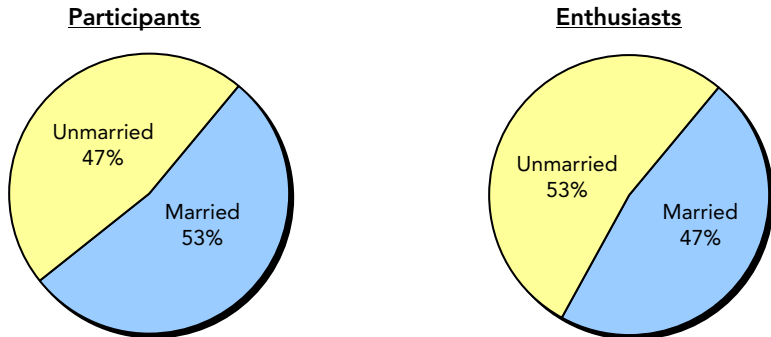
GENDER



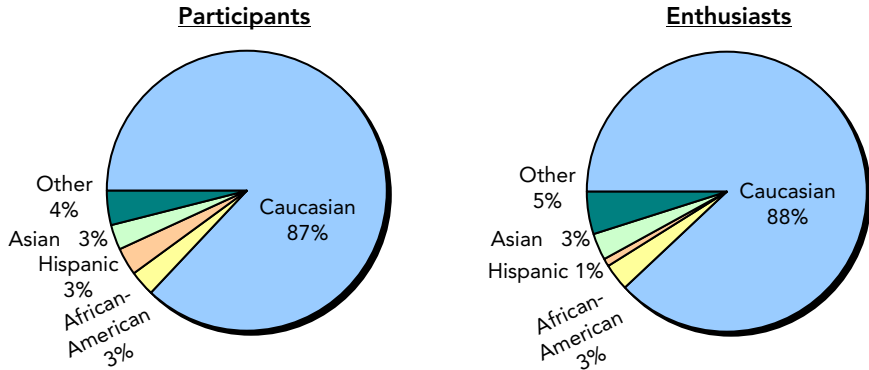
AGE



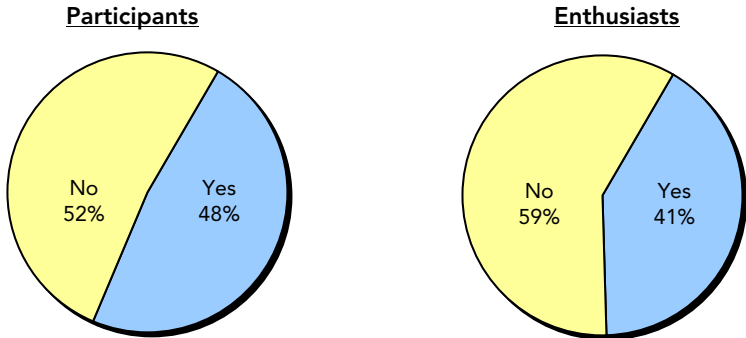
MARITAL STATUS



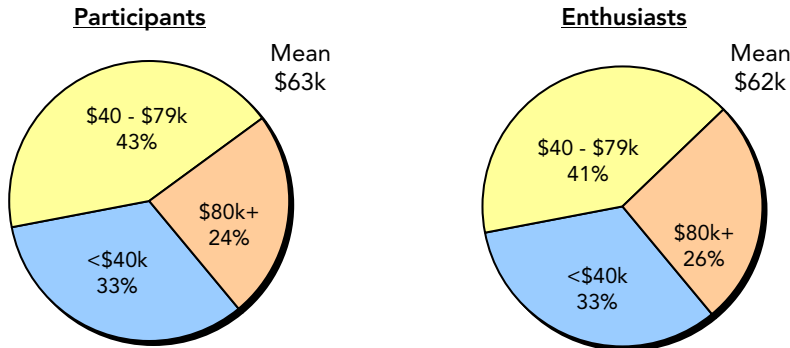
ETHNICITY



PRESENCE OF CHILDREN <18 in HOUSEHOLD



HOUSEHOLD INCOME



HIKING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- The demographic profile of hiking Participants has remained primarily stable since 1998.
- Year 2003 hikers are slightly more likely to be male (57%), but female (43%) representation among the population is strong.
- The age profile of year 2003 hikers is relatively balanced with Participants sourced from all age groups. The median age of Americans who report hiking in 2003 is 38.
- Nearly nine in 10 (87%) of hiking Participants are Caucasian, reflecting an ethnic profile that has remained constant over the past six years.

<u>Dimension</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>
<u>Gender</u>						
Male	52%	52%	52%	54%	53%	57%
Female	48%	48%	48%	46%	47%	43%
<u>Age</u>						
16 to 24	21%	18%	25%	25%	26%	24%
25 to 34	22%	23%	20%	25%	22%	23%
35 to 44	23%	26%	23%	21%	19%	20%
45+	34%	34%	32%	30%	33%	33%
<u>Marital Status</u>						
Married	52%	56%	51%	48%	51%	53%
Unmarried	48%	44%	49%	52%	49%	47%
<u>Ethnicity</u>						
Caucasian	91%	90%	87%	87%	88%	87%
African-American	3%	4%	3%	3%	4%	3%
Hispanic	4%	3%	5%	4%	4%	3%
Asian	2%	2%	3%	2%	2%	3%
<u>Children <18</u>						
Yes	43%	46%	47%	41%	43%	48%
<u>Household Income</u>						
<\$40k	NA	27%	33%	37%	34%	33%
\$40k - \$79k	NA	37%	46%	45%	41%	43%
\$80k+	NA	21%	21%	18%	25%	24%
<u>Region</u>						
Northeast	19%	18%	10%	18%	19%	19%
South Central	30%	29%	29%	27%	31%	30%
North Central	24%	24%	29%	24%	24%	23%
West	28%	29%	33%	30%	26%	28%

HIKING DEMOGRAPHIC PROFILE TRENDS OF ENTHUSIASTS

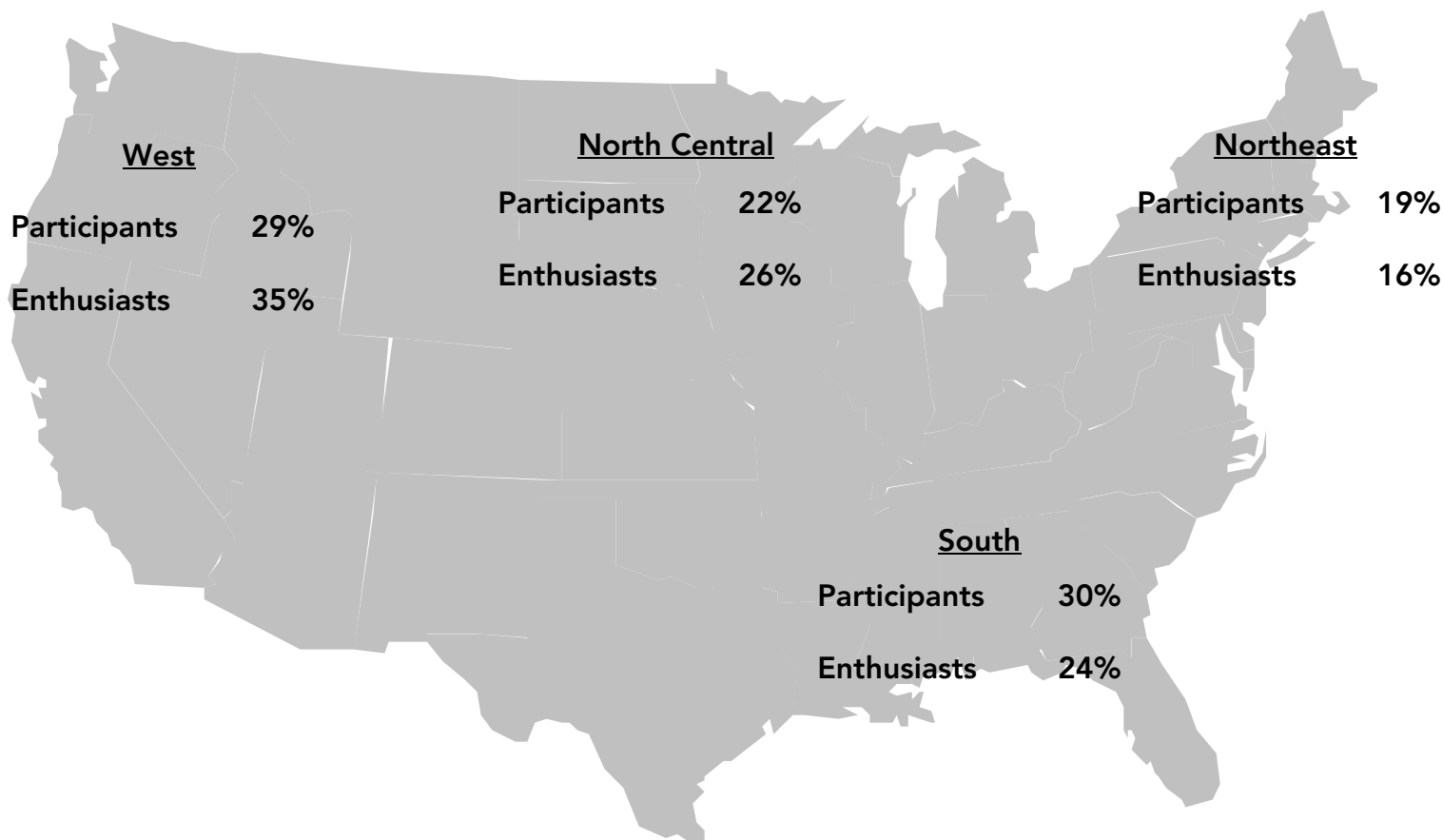
- The population of Americans who went hiking 14 or more times in 2003 is comprised of a greater percentage of males (60%) than females (40%). The gender profile of hiking Enthusiasts has changed significantly from 1998 when the population was split evenly along gender lines.
- The 2003 Enthusiast population continues to reflect measurable interest among Americans of all ages – including Americans between the ages of 16 and 34 (43%). The median age of year 2003 Enthusiasts is 38 years.
- Compared to six years ago, the incidence of year 2003 hiking Enthusiasts who live in the North Central region has increased significantly (26% compared to 15%).

<u>Dimension</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>
<u>Gender</u>						
Male	50%	59%	51%	60%	60%	60%
Female	50%	41%	49%	40%	40%	40%
<u>Age</u>						
16 to 24	17%	14%	16%	24%	25%	20%
25 to 34	20%	29%	17%	24%	21%	23%
35 to 44	22%	24%	25%	20%	20%	21%
45+	40%	33%	43%	32%	34%	36%
<u>Marital Status</u>						
Married	52%	52%	52%	45%	50%	47%
Unmarried	48%	48%	48%	55%	50%	53%
<u>Ethnicity</u>						
Caucasian	97%	93%	92%	89%	91%	88%
African-American	0%	1%	1%	1%	3%	3%
Hispanic	3%	2%	3%	4%	3%	1%
Asian	*	1%	1%	1%	2%	3%
<u>Children <18</u>						
Yes	37%	37%	44%	32%	40%	41%
<u>Household Income</u>						
<\$40k	NA	28%	34%	32%	36%	33%
\$40k - \$79k	NA	37%	43%	47%	44%	41%
\$80k+	NA	21%	23%	21%	20%	26%
<u>Region</u>						
Northeast	21%	15%	8%	19%	17%	16%
South Central	26%	27%	26%	28%	31%	24%
North Central	15%	23%	28%	20%	25%	26%
West	38%	36%	38%	30%	27%	35%

HIKING REGIONAL PROFILE YEAR 2003

Americans who went hiking in 2003 can be found in all regions of the U.S., but residence is most common in the South (30%) and West (29%).

The states that comprise the West (35%) region are where hiking Enthusiasts are most likely to reside, followed by the North Central (26%) and South (24%) regions.



HIKING CROSSOVER ACTIVITY IN YEAR 2003

Hikers report measurable levels of crossover participation in a core set of activities - paved road bicycling (53.5%), car camping (38.6%), trail running (32.1%), single track (31.6%) and wide track (31.2%) bicycling.

Activities	Hiker - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Hiking	100.0%	71.6
Bicycling - Paved Road	53.5%	38.4
Car Camping	38.6%	27.8
Trail Running	32.1%	23.0
Bicycling - Single Track	31.6%	22.7
Bicycling - Dirt Road	31.2%	22.4
Canoeing	22.2%	16.0
Camping (Away from Car)	16.7%	12.1
Backpacking	14.2%	10.2
Bird Watching	13.5%	9.6
Fly-Fishing	11.0%	7.9
Rafting	10.6%	7.6
Cross-Country/Nordic Skiing	9.4%	6.8
Kayaking - Recreation/St-on-Top	7.1%	5.1
Climbing - Artificial Wall	6.1%	4.5
Kayaking - Touring/Sea	5.9%	4.2
Climbing - Natural Rock	5.3%	3.8
Showshoeing	5.2%	3.7
Telemark Skiing	2.9%	2.1
Kayaking - Whitewater	1.8%	1.3
Climbing - Ice	0.6%	0.430

OUTDOOR RECREATION PARTICIPATION STUDY

KAYAKING

"Have you gone touring / sea kayaking?"

"Have you gone whitewater kayaking?"

"Have you gone recreation / sit on top kayaking?"

KAYAKING

Headlines

- Following several years of dynamic growth, Participant and Enthusiast levels for overall kayaking activity stalls in 2003.
- Participant and Enthusiast populations for all types of kayaking are **9.9 million** and **1.5 million** respectively.
- Touring/Sea and whitewater kayaking Participant activity is down in 2003 from peak activity levels measured in 2002
- Americans who went kayaking in 2003 tend to be male

TOURING/SEA KAYAKING

- Participants generated a total of 29 million touring/sea kayaking outings in 2003

Touring/sea kayaking Participants went paddling an average of five times in 2003.

78% of Participants went touring/sea kayaking less than the average number of times and 11% went touring/sea kayaking more than average (six or more times). 42% of Participants went touring/sea kayaking only one time in 2003

RECREATION/SIT ON TOP KAYAKING

- Recreation/Sit-on-top kayaking Participant and Enthusiast activity remains unchanged from the previous year
- Recreation/Sit-on-top kayaking has eclipsed touring/sea kayaking as the format with the largest Participant population

Participants went recreation/sit-on-top kayaking an average of four times in 2003.

73% of Participants went recreation/sit-on-top kayaking less than the average number of times and 16% went recreation/sit-on-top kayaking more than average (five or more times). 48% of Participants went recreation/sit-on-top kayaking only one time in 2003

WHITEWATER KAYAKING

- Enthusiast level whitewater activity is down from 2002

The average number of times that Participants went whitewater kayaking in 2003 is three.

The majority of Participants (84%) went whitewater kayaking less than the average number of times and 7% went whitewater kayaking more than average. One-half of Participants went whitewater kayaking only one time in 2003

KAYAKING PARTICIPANT & ENTHUSIAST LEVELS IN YEAR 2003

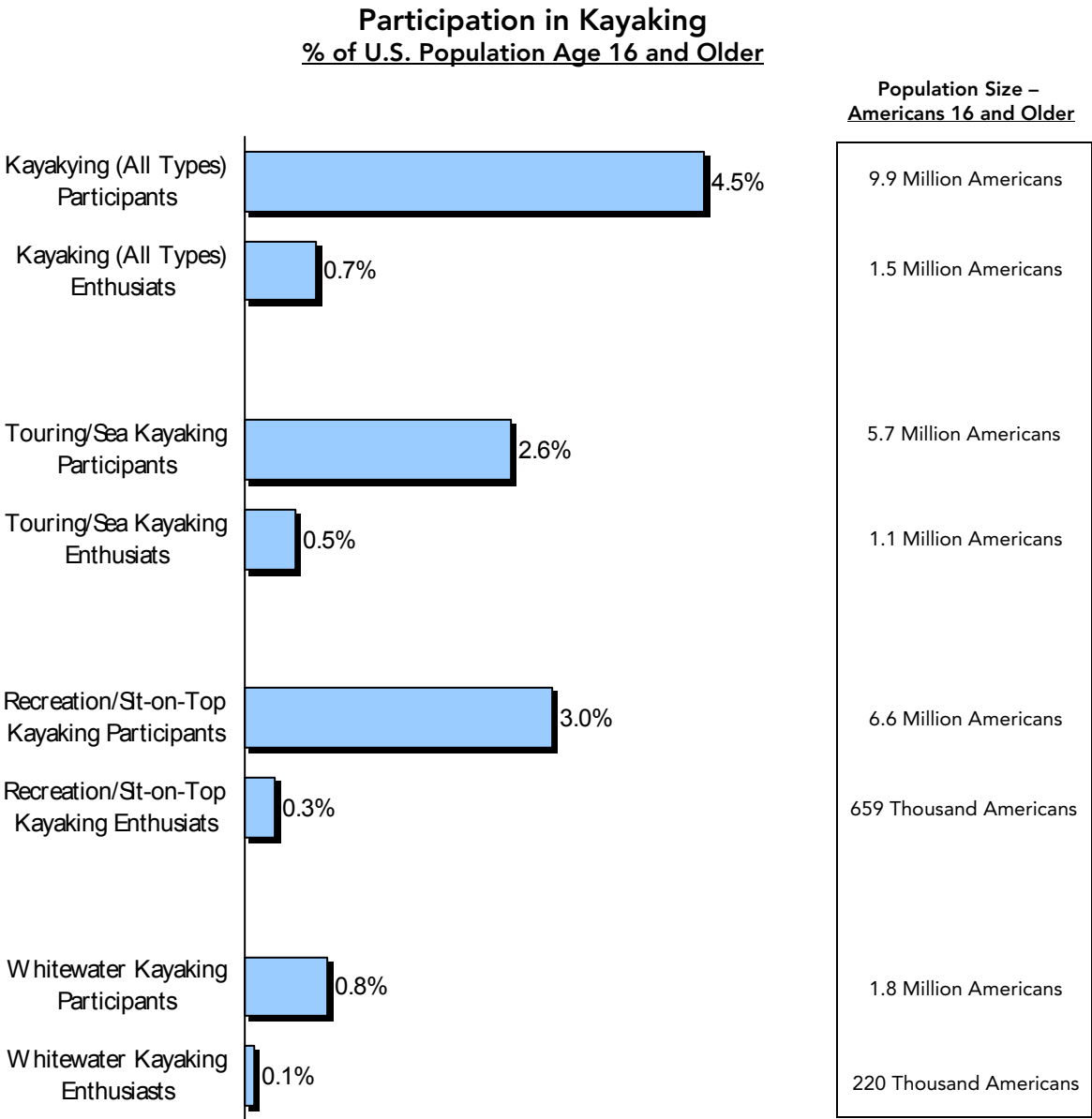
Nearly 10 million Americans 16 and older participated in some form of kayaking activity in 2003 and 1.5 were involved at Enthusiast levels.

Participation in the different types of kayaking differs among Americans and reveals notable shifts.

During 2003, Americans most often participated in recreation/sit-on-top kayaking – the first time that this form of kayaking has generated the largest Participant population. The Participant population is equal to 6.6 million Americans and 659 thousand Americans went recreation/sit-on-top kayaking seven or more times – qualifying them as an Enthusiast.

Touring/sea kayaking generates the next highest level of kayaking activity. Participation activity yields a population of nearly 6 million Americans. Among touring/sea kayakers, 1.1 million participated at Enthusiast levels (6 or more times) in 2003.

Comparatively, Americans have the lowest levels of involvement with whitewater kayaking. Slightly less than 1% of the U.S. population 16 and older went whitewater kayaking in 2003 at least one time – equal to 1.8 million Americans. Whitewater kayaking Enthusiasts (three or more times) number 220,000.



KAYAKING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:
Following several years of dynamic growth, kayaking shows signs of maturing as an activity. New Participants are entering the activity at a slower rate than in previous years, and the level of committed and regular kayakers participating at the highest frequency levels has also stabilized.

Short-term Perspective (Compared to 2002):
In 2003, nearly one in 20 (4.5%) Americans 16 and older went kayaking at least one time – a Participant level unchanged from the previous year.

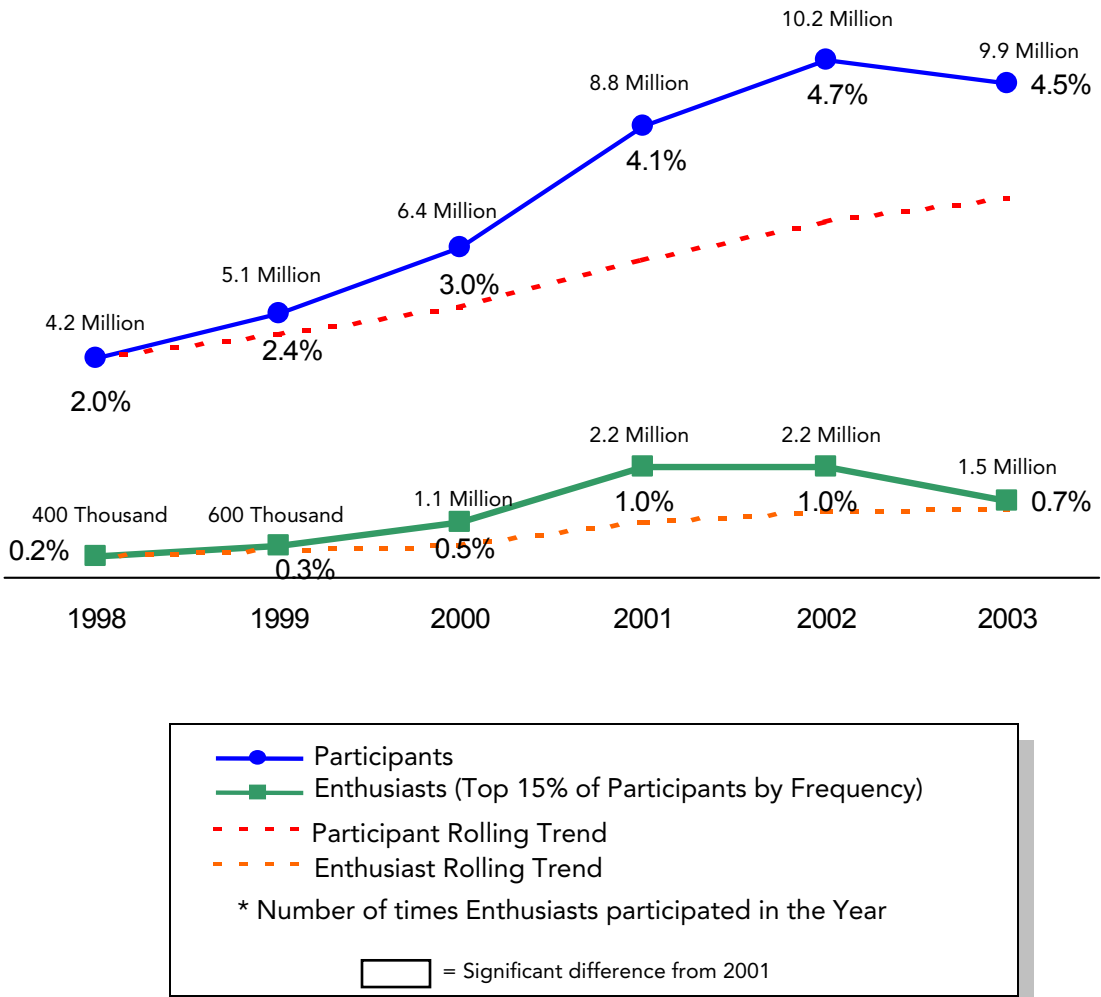
The level of kayakers participating within the top 15% of activity has also lost the momentum experienced in 2002.

Three-Year Perspective (Compared to 2001):
Year 2003 Participant and Enthusiast levels remain on par with the levels reported in 2001.

Long-term Perspective (Compared to 1998):
Participation in kayaking has grown dynamically from six years ago. The year 2003 Participant and Enthusiast populations have more than doubled since 1998.

Cumulative Perspective (Rolling Trend):
Rolling trend Participant and Enthusiast levels reveal steady growth.

Participation in Kayaking
% of U.S. Population Age 16 and Older



TOURING / SEA KAYAKING PARTICIPANT AND ENTHUSIAST TRENDS

Overall Perspective: An increase in touring/sea kayaking participation experienced in 2002 is not sustained in 2003. Enthusiast population remains the same.

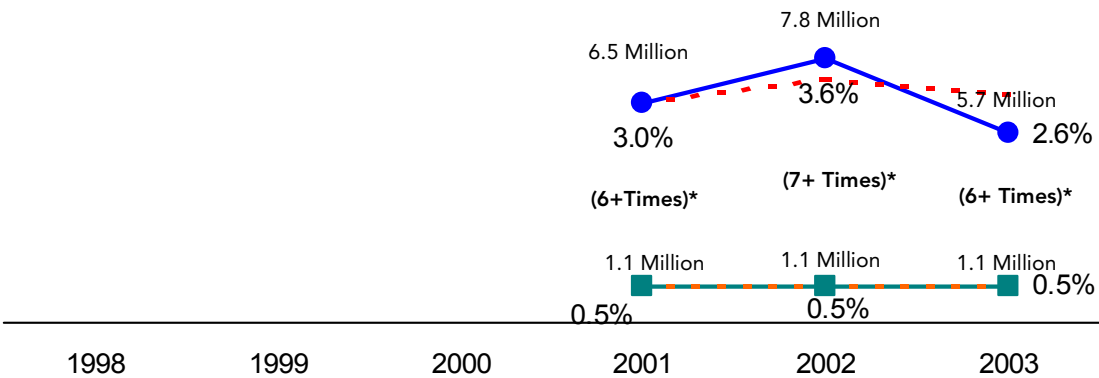
Short-term Perspective (Compared to 2002):
In 2003, participation in touring/sea kayaking dropped 28% when compared to the spike in activity measured in 2002. The decline in touring/sea kayaking participation in 2003 resulted in the activity being supplanted by recreation/sit-on-top activity as the most popular form of kayaking.

The Enthusiast touring/sea kayaking population in 2003 is unchanged from year 2002. Slightly more than one million Americans 16 and older have participated in touring/sea kayaking in each of the past three years.

Three-Year Perspective (Compared to 2001):
Year 2003 Participant and Enthusiast levels and the frequency in which Enthusiasts paddle, remains on par with the levels reported in 2001.

Cumulative Perspective (Rolling Trend):
Rolling trend Participant and Enthusiast levels have remained primarily stable over the past three years.

Participation in Touring/Sea Kayaking
% of U.S. Population Age 16 and Older



Participants

Enthusiasts (Top 15% of Participants by Frequency)

Participant Rolling Trend

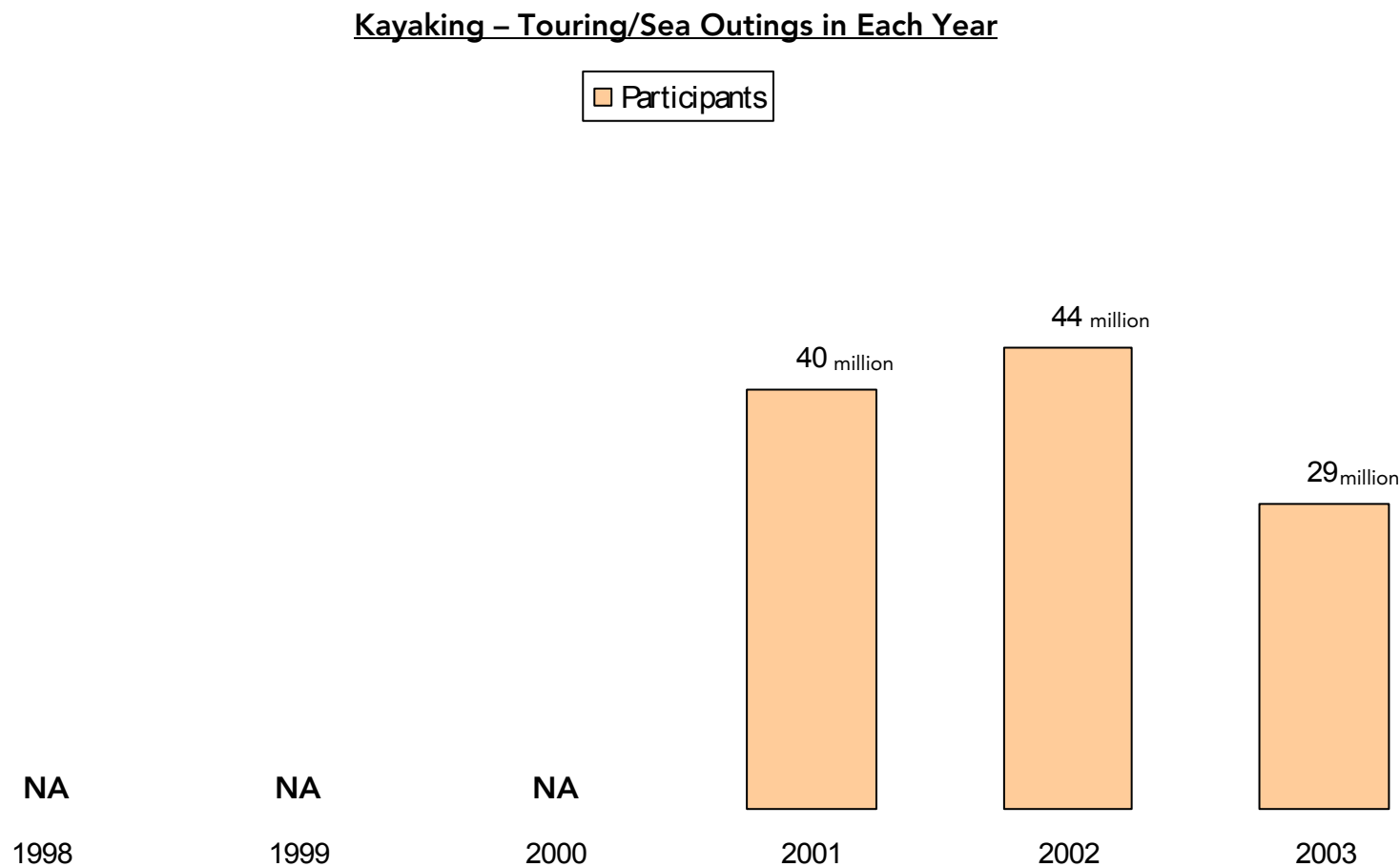
Enthusiast Rolling Trend

* Number of times Enthusiasts participated in the Year

= Significant difference from 2001

TOURING/SEA KAYAKING TOTAL NUMBER OF OUTINGS PER YEAR*

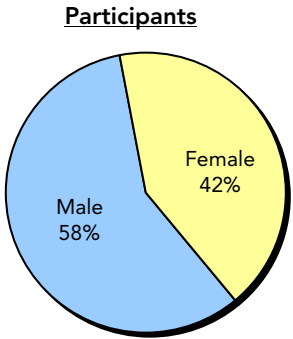
During 2003, the total number of touring.sea kayaking outings declined to 29 million. The drop-off in outings is the result of the decline in the number of Americans 16 and older participation in the activity during 2003.



* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went touring/sea kayaking each year

TOURING / SEA KAYAKING DEMOGRAPHIC PROFILE

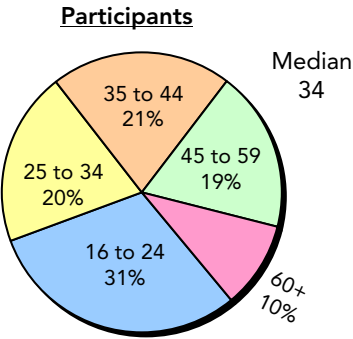
GENDER



Enthusiasts

NA

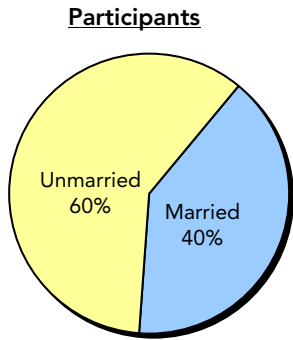
AGE



Enthusiasts

NA

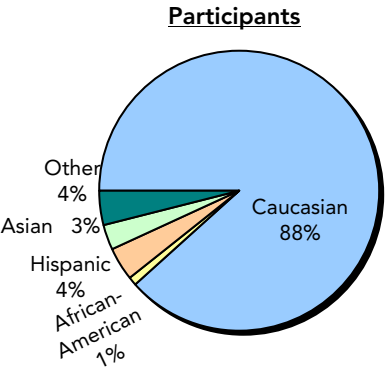
MARITAL STATUS



Enthusiasts

NA

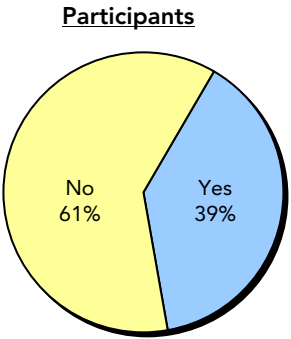
ETHNICITY



Enthusiasts

NA

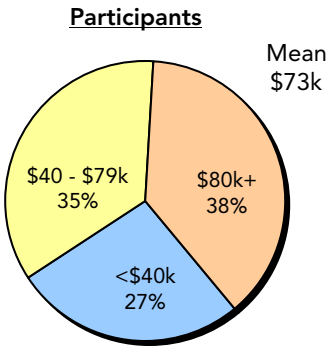
PRESENCE OF CHILDREN <18 in HOUSEHOLD



Enthusiasts

NA

HOUSEHOLD INCOME



Enthusiasts

NA

TOURING / SEA KAYAKING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- The majority of the 2003 touring/sea kayaking Participant population is comprised of males (58%).
- In 2003, touring/sea kayaking drew Participants of all ages. One-half of Participants are between the ages of 16 to 24 (50%) and 35 and older (50%). The median age of year 2003 Participants is older than in 2001 – 34 compared to 29.5.
- In 2003, touring/sea kayaking remains an activity primarily participated in by Caucasians (88%).
- As a group, Americans 16 and older who went touring/sea kayaking are among the most affluent Participant population with a mean household income of \$73,000.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	NA	NA	NA	51%	60%	58%
Female	NA	NA	NA	49%	40%	42%
Age						
16 to 24	NA	NA	NA	41%	39%	31%
25 to 34	NA	NA	NA	26%	16%	20%
35 to 44	NA	NA	NA	15%	16%	21%
45+	NA	NA	NA	18%	29%	29%
Marital Status						
Married	NA	NA	NA	52%	42%	40%
Unmarried	NA	NA	NA	48%	58%	60%
Ethnicity						
Caucasian	NA	NA	NA	83%	88%	88%
African-American	NA	NA	NA	4%	5%	1%
Hispanic	NA	NA	NA	7%	4%	4%
Asian	NA	NA	NA	4%	2%	2%
Children <18						
Yes	NA	NA	NA	36%	44%	39%
Household Income						
<\$40k	NA	NA	NA	23%	23%	27%
\$40k - \$79k	NA	NA	NA	48%	36%	35%
\$80k+	NA	NA	NA	29%	41%	38%
Region						
Northeast	NA	NA	NA	26%	34%	29%
South Central	NA	NA	NA	31%	23%	22%
North Central	NA	NA	NA	15%	15%	18%
West	NA	NA	NA	28%	28%	32%

TOURING/SEA KAYAKING CROSSOVER ACTIVITY IN YEAR 2003

In 2003, Americans who went touring/sea kayaking devoted time and effort to activities off the water as well. Hiking (72.9%) and paved road bicycling are the activities most often participated in by year 2003 touring/sea kayakers.

Within kayaking, Participants did not limit their participation to only touring/ sea activity. More than one-half (53.6%) of year 2003 touring/sea kayakers also participated in recreation/sit-on-top kayaking during the year – equal to a crossover population of 2.9 million Americans 16 and older.

Activities	Touring/Sea Kayakers - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Kayaking - Touring/Sea	100.0%	5.7
Hiking	72.9%	4.2
Bicycling - Paved Road	69.5%	4.0
Kayaking - Recreation/Sit-on-Top	51.1%	2.9
Bicycling - Single Track	49.5%	2.9
Trail Running	49.2%	2.8
Bicycling - Dirt Road	48.3%	2.8
Canoeing	39.6%	2.3
Car Camping	27.3%	1.6
Camping (Away from Car)	26.7%	1.6
Backpacking	21.0%	1.2
Kayaking - Whitewater	17.3%	1.0
Cross-Country/Nordic Skiing	13.4%	0.779
Rafting	13.3%	0.758
Bird Watching	12.3%	0.704
Climbing - Natural Rock	11.0%	0.635
Climbing - Artificial Wall	8.4%	0.493
Fly-Fishing	8.4%	0.486
Showshoeing	5.3%	0.302
Telemark Skiing	3.6%	0.206
Climbing - Ice	0.9%	0.051

RECREATION / SIT ON TOP KAYAKING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:
The consistent interest that Americans have shown for recreation/sit-on-top kayaking makes this activity the most popular type of kayaking in 2003.

Short-term Perspective (Compared to 2002):
In 2003, participation in recreation/sit-on-top kayaking remains unchanged from 2002.

The level of recreation/sit-on-top kayakers who are Enthusiasts (7 or more times) is primarily unchanged from 2002 levels.

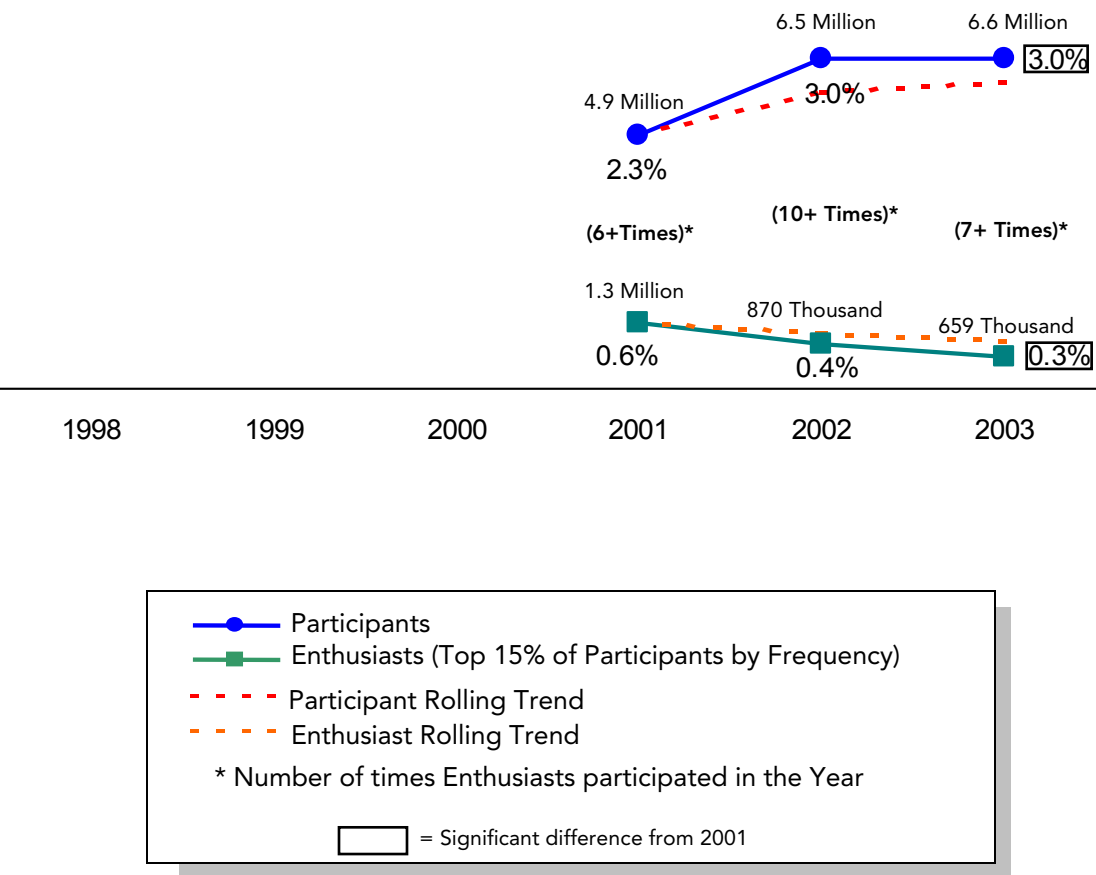
Three-Year Perspective (Compared to 2001):
Participation in recreation/sit-on-top kayaking is higher in 2003 among Americans 16 and older than in 2001.

Despite the increase in Participant, the incidence of Americans participating in the activity at Enthusiast levels are down from 2001. This dynamic suggests that from a long term perspective the activity has attracted new Participants who are not yet fully devoting time to the new activity.

Cumulative Perspective (Rolling Trend):
Rolling trend results reveal growing Participant levels.

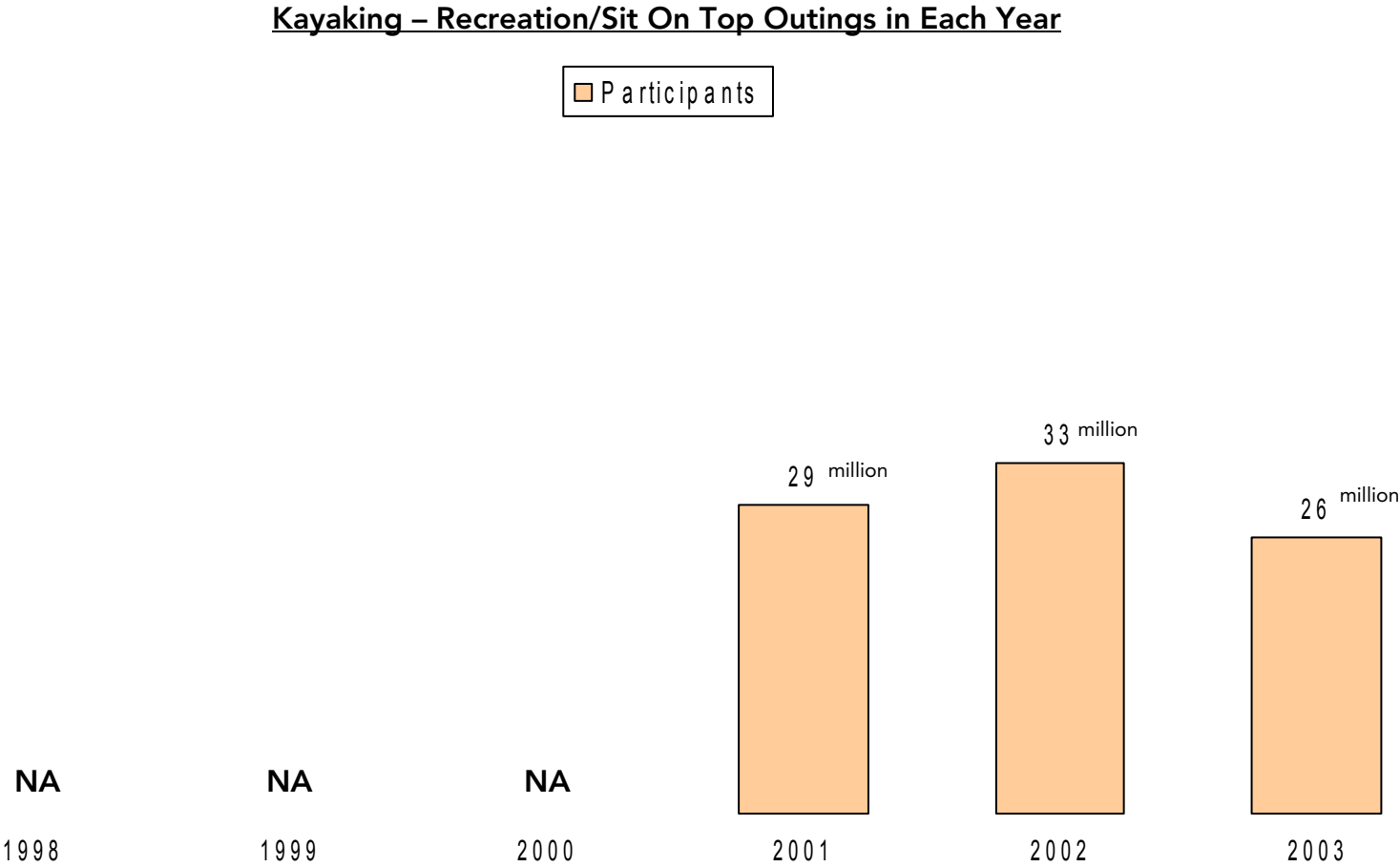
Enthusiast levels have declined moderately over the past three years.

Participation in Recreation/Sit-On-Top Kayaking
% of U.S. Population Age 16 and Older



RECREATION / SIT ON TOP KAYAKING TOTAL NUMBER OF OUTINGS PER YEAR*

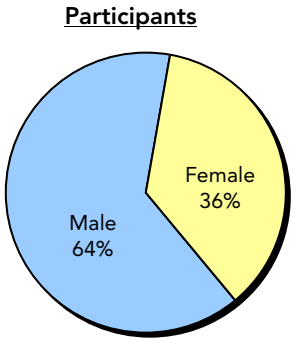
On average, Participants went recreation/sit-on-top kayaking less often in 2003, leading to a decline in the number of total outings (26 million) from the previous year (33 million).



* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went recreational kayaking each year

RECREATION / SIT ON TOP KAYAKING DEMOGRAPHIC PROFILES

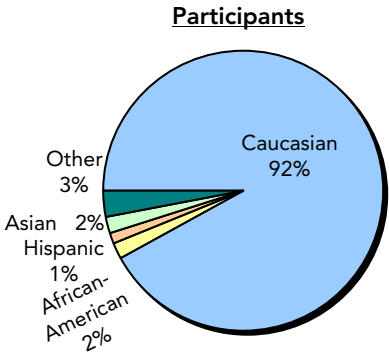
GENDER



Enthusiasts

NA

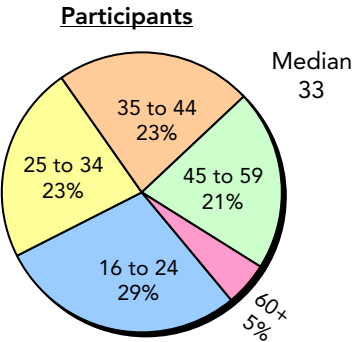
ETHNICITY



Enthusiasts

NA

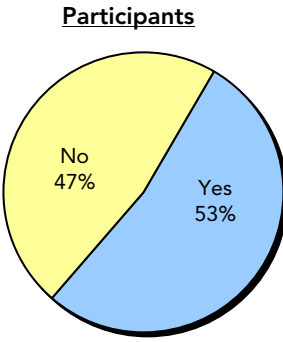
AGE



Enthusiasts

NA

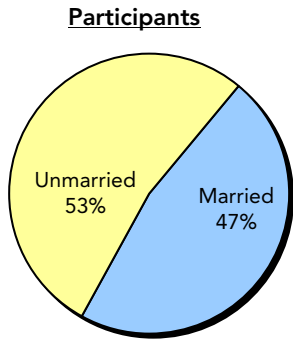
PRESENCE OF CHILDREN <18 in HOUSEHOLD



Enthusiasts

NA

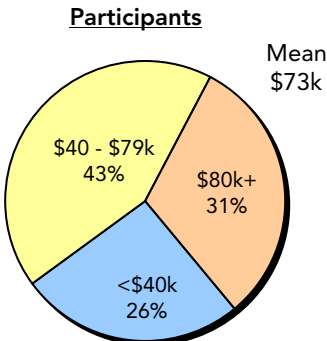
MARITAL STATUS



Enthusiasts

NA

HOUSEHOLD INCOME



Enthusiasts

NA

RECREATION / SIT ON TOP KAYAKING

DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- In 2003, the recreation/sit-on-top kayaking population continues to reveal a shift to a majority of male Participants. Nearly two-thirds of Participants are male (64%), compared to fewer than one-half (48%) in 2001.
- Recreation/sit-on-top kayakers represent all ages groups. The balanced age profile yields a median age of 33 years.
- As in 2001 and 2002, the year 2003 recreation/sit-on-top kayaking population is comprised nearly universally (92%) of Caucasian Americans.
- As a group, Americans 16 and older who went recreation/sit-on-top kayaking are among the most affluent Participant population, with a mean household income of \$73,000.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	NA	NA	NA	48%	58%	64%
Female	NA	NA	NA	52%	42%	36%
Age						
16 to 24	NA	NA	NA	34%	37%	29%
25 to 34	NA	NA	NA	26%	16%	23%
35 to 44	NA	NA	NA	20%	18%	23%
45+	NA	NA	NA	21%	29%	26%
Marital Status						
Married	NA	NA	NA	40%	39%	47%
Unmarried	NA	NA	NA	60%	61%	53%
Ethnicity						
Caucasian	NA	NA	NA	86%	87%	92%
African-American	NA	NA	NA	2%	4%	2%
Hispanic	NA	NA	NA	6%	5%	1%
Asian	NA	NA	NA	2%	3%	2%
Children <18						
Yes	NA	NA	NA	37%	47%	53%
Household Income						
<\$40k	NA	NA	NA	30%	23%	26%
\$40k - \$79k	NA	NA	NA	38%	44%	43%
\$80k+	NA	NA	NA	32%	33%	31%
Region						
Northeast	NA	NA	NA	30%	31%	27%
South Central	NA	NA	NA	30%	21%	27%
North Central	NA	NA	NA	16%	16%	21%
West	NA	NA	NA	24%	31%	26%

☐ = Significant difference from 2001

RECREATION / SIT ON TOP KAYAKING CROSSOVER ACTIVITY IN YEAR 2003

Year 2003 recreation/sit-on-top kayakers participated in a range of other activities during the year.

Hiking (77.7%) and paved road bicycling (67.1%) are among the most popular crossover activities among recreation/sit-on-top Participants in 2003.

Recreation/sit-on-top kayakers also engaged in other paddlesports at measurable levels in 2003 – touring/sea kayaking (46.1% or 2.9 million) and canoeing (46.5% or 3.1 million) particularly.

Activities	Recreation/Sit-on-Top Kayakers - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Kayaking - Recreation/Sit-on-Top	100.0%	6.6
Hiking	77.7%	5.1
Bicycling - Paved Road	67.1%	4.4
Canoeing	46.5%	3.1
Kayaking - Touring/Sea	46.1%	2.9
Trail Running	43.8%	2.9
Bicycling - Single Track	42.9%	2.8
Bicycling - Dirt Road	37.7%	2.5
Car Camping	31.1%	2.0
Camping (Away from Car)	29.0%	1.9
Backpacking	22.6%	1.5
Rafting	22.5%	1.5
Climbing - Artificial Wall	17.5%	1.2
Kayaking - Whitewater	17.1%	1.1
Cross-Country/Nordic Skiing	17.8%	1.1
Fly-Fishing	14.6%	1.0
Showshoeing	11.5%	0.759
Climbing - Natural Rock	11.3%	0.745
Bird Watching	10.9%	0.704
Telemark Skiing	8.4%	0.554
Climbing - Ice	0.8%	0.053

WHITewater KAYAKING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:
A sharp increase in whitewater kayaking participation experienced in 2002 dissipated in 2003.

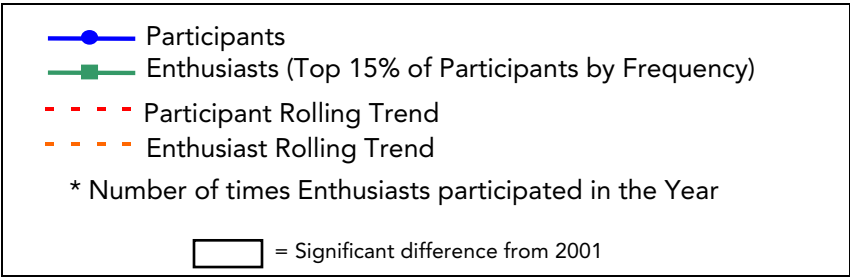
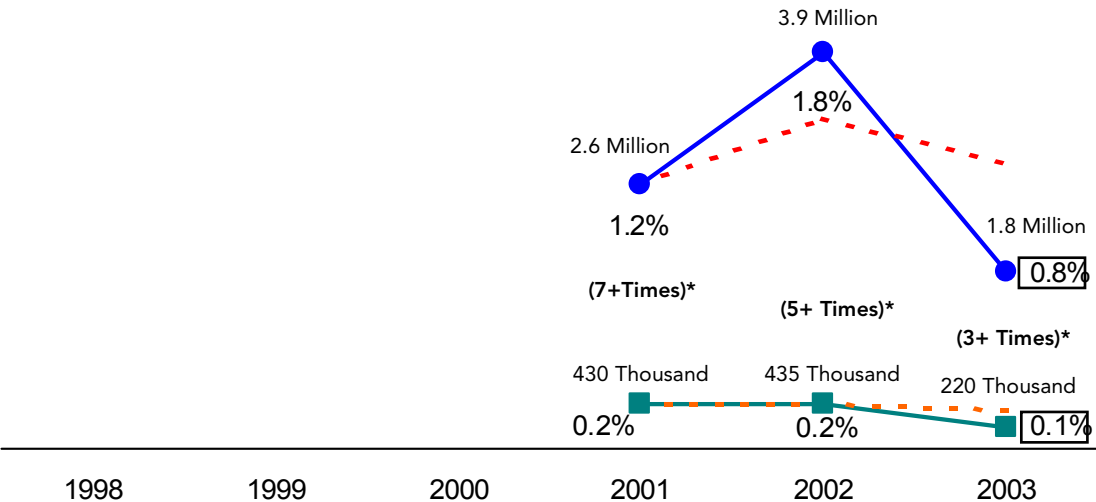
Short-term Perspective (Compared to 2002):
During 2003, nearly two million Americans participated in whitewater kayaking – well-below (down 56%) the surge of participation measured in 2002 when nearly four million Americans 16 and older went whitewater kayaking.

The incidence of Americans participating in whitewater kayaking at Enthusiast levels also dropped in 2003 – down 50% to a population of 220 thousand Americans 16.

Three-Year Perspective (Compared to 2001):
Year 2003 Participant and Enthusiast levels are down from levels reported in 2001.

Cumulative Perspective (Rolling Trend):
Rolling trend Participant and Enthusiast levels have remained primarily stable over the past three years, but the chart reflects the result of sharp declines noted in 2003.

Participation in Whitewater Kayaking
% of U.S. Population Age 16 and Older



WHITewater KAYAKING PARTICIPANT & ENTHUSIAST TRENDS

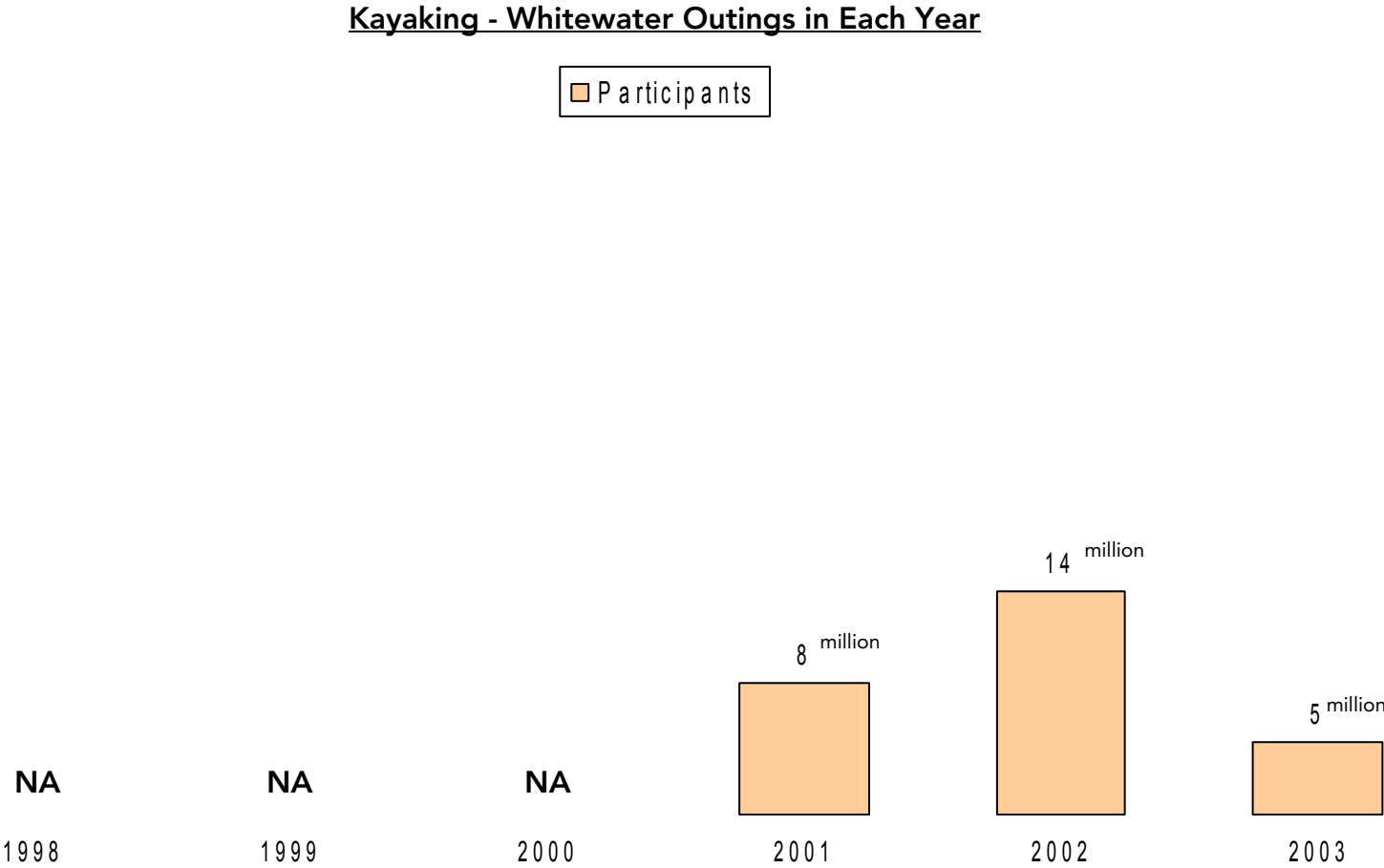
- Whitewater kayaking experienced a significant decline in participation from 2002 to 2003. Did 2003 signal the start of an erosion in Americans' interest in whitewater kayaking or was the record high level of participation reported in 2002 an aberration.
- Three-year trend analysis reveals that year 2002 may have been a unique year for whitewater kayaking, but that year 2003 participation levels have also dropped below the levels reported in 2001 in most key population groups.
- Future Participation Study Reports will shed light on the true participation trend in whitewater kayaking among Americans 16 and older.

Participation in Kayaking - Whitewater

	<u>Whitewater Kayaking Participation Incidence</u>				
<u>Segment</u>	<u>2001</u>	<u>2002</u>	<u>% Change: 2001 to 2002</u>	<u>2003</u>	<u>% Change: 2001 to 2003</u>
Americans 16+	1.2%	1.8%	+50%	0.8%	-33%
Males	1.5%	2.3%	+53.3%	1.0%	-33%
Females	0.9%	1.2%	+33.3%	0.6%	-33%
16 to 24	1.8%	3.2%	+77.8%	1.3%	-28%
25 to 34	1.6%	1.7%	+6.2%	0.7%	-56%
35 to 44	1.4%	1.9%	+35.7%	0.8%	-43%
45+	0.5%	0.9%	+80.0%	0.7%	+40%
Northeast	1.5%	2.5%	+66.7%	1.0%	-33%
South	1.2%	1.0%	-16.7%	0.8%	-33%
North Central	1.2%	1.0%	-16.7%	0.9%	-25%
West	1.2%	3.3%	+175%	0.6%	-50%

WHITEWATER KAYAKING TOTAL NUMBER OF OUTINGS PER YEAR*

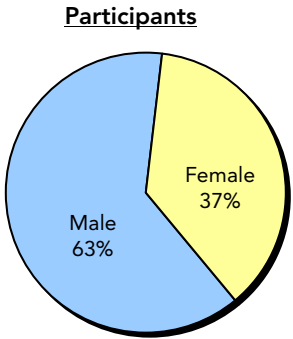
The sharp decline in the number of Americans 16 and older participating in whitewater kayaking in 2003 yielded the fewest number of total outings in the past three years (5 million).



* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went whitewater kayaking each year

WHITEWATER KAYAKING DEMOGRAPHIC

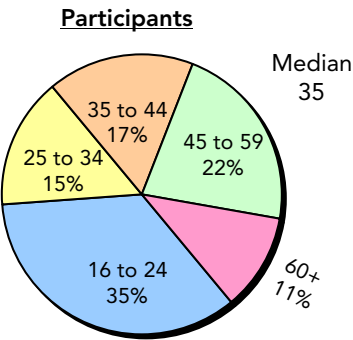
GENDER



Enthusiasts

NA

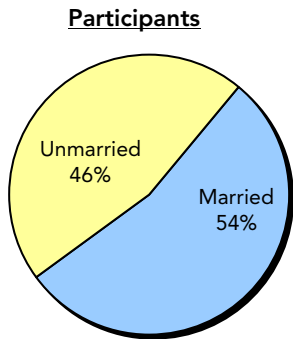
AGE



Enthusiasts

NA

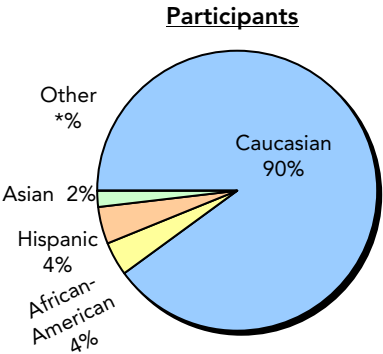
MARITAL STATUS



Enthusiasts

NA

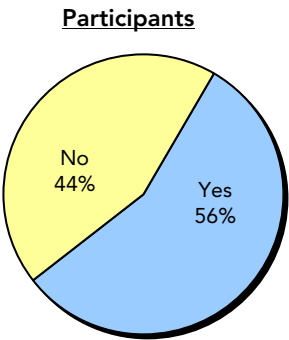
ETHNICITY



Enthusiasts

NA

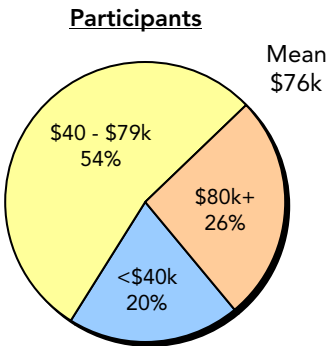
PRESENCE OF CHILDREN <18 in HOUSEHOLD



Enthusiasts

NA

HOUSEHOLD INCOME



Enthusiasts

NA

* = Less than 1%

WHITEWATER KAYAKING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- Americans 16 and older who went whitewater kayaking in 2003 tend to be male (63%). This gender composition is consistent with previous populations back to 2001.
- In 2003, the whitewater kayaking Participant population is older overall than the 2002 segment, indicating that erosion in participation of younger Americans contributed to the drop-off in whitewater activity. The median age of the 2003 population is 35.0 – compared to a median age of 29.5 in year 2002.
- As in 2001 and 2002, the year 2003 whitewater kayaking population is comprised nearly universally (90%) of Caucasian Americans.
- As a group, Americans 16 and older who went whitewater kayaking are among the most affluent Participant population – mean household income of \$76,000.

<u>Dimension</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>	<u>2002</u>	<u>2003</u>
<u>Gender</u>						
Male	NA	NA	NA	60%	65%	63%
Female	NA	NA	NA	40%	35%	37%
<u>Age</u>						
16 to 24	NA	NA	NA	34%	42%	35%
25 to 34	NA	NA	NA	28%	18%	15%
35 to 44	NA	NA	NA	21%	19%	17%
45+	NA	NA	NA	17%	21%	33%
<u>Marital Status</u>						
Married	NA	NA	NA	34%	35%	54%
Unmarried	NA	NA	NA	66%	65%	46%
<u>Ethnicity</u>						
Caucasian	NA	NA	NA	85%	86%	90%
African-American	NA	NA	NA	4%	5%	4%
Hispanic	NA	NA	NA	7%	6%	4%
Asian	NA	NA	NA	4%	2%	2%
<u>Children <18</u>						
Yes	NA	NA	NA	30%	46%	56%
<u>Household Income</u>						
<\$40k	NA	NA	NA	24%	30%	20%
\$40k - \$79k	NA	NA	NA	52%	38%	54%
\$80k+	NA	NA	NA	24%	32%	26%
<u>Region</u>						
Northeast	NA	NA	NA	24%	25%	23%
South Central	NA	NA	NA	32%	11%	35%
North Central	NA	NA	NA	20%	11%	26%
West	NA	NA	NA	24%	53%	16%

WHITewater KAYAKING CROSSOVER ACTIVITY IN YEAR 2003

Year 2003 whitewater kayakers have a broad range of interests.

Paved road bicycling (73.2%) and hiking (71.8%) are among the outdoor activities that whitewater kayakers are most likely to have participated in during 2003.

The specialized skills demanded by whitewater kayaking yields a population that appears comfortable and interested in the other forms of paddlesports. Measurable levels of whitewater kayakers also participated in recreation/sit-on-top kayaking (61.2% or 1.1 million), touring/sea kayaking (54.4% or 1.0 million) and canoeing (47.1% or 874 thousand) during 2003.

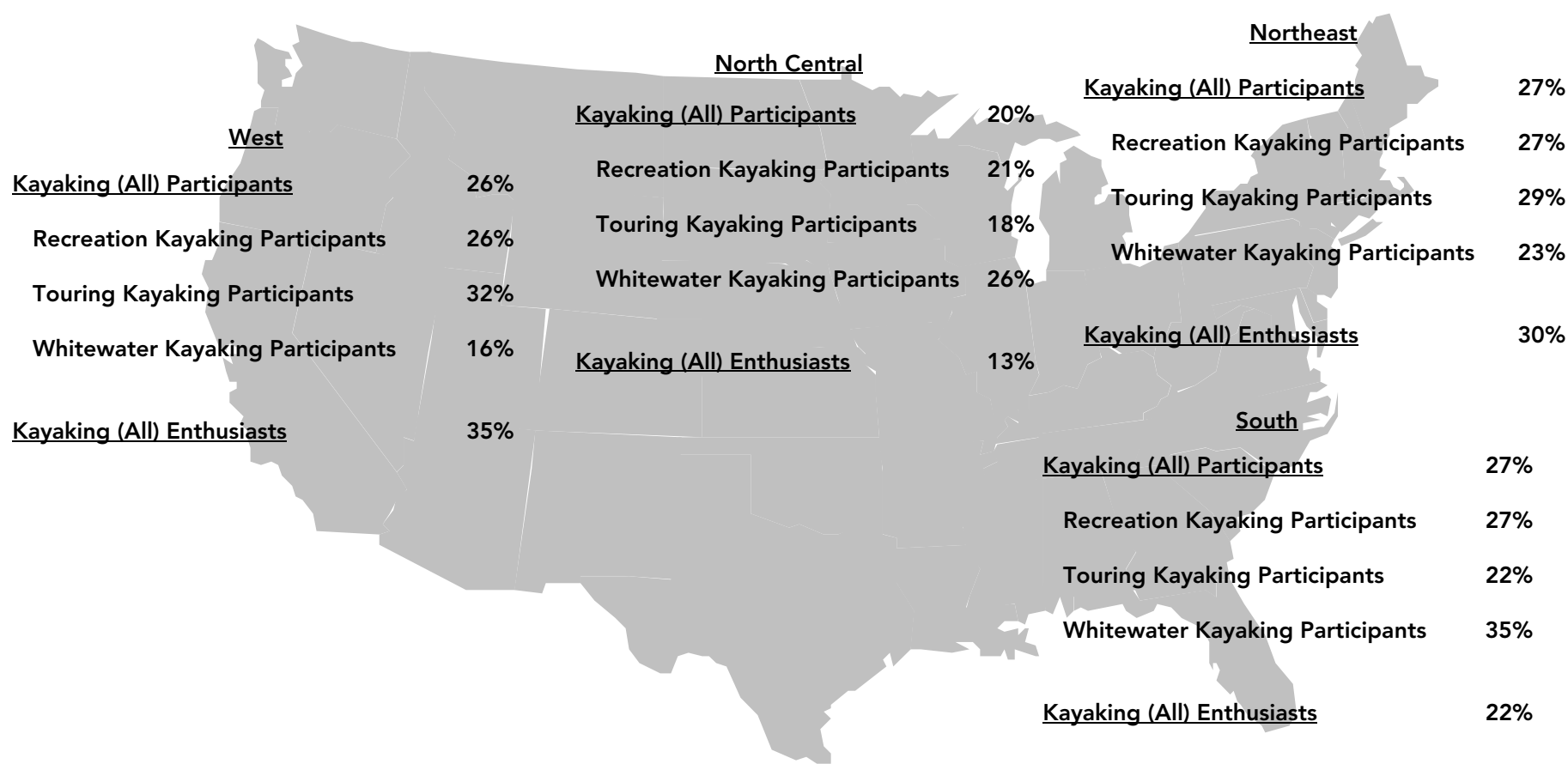
Activities	Whitewater Kayakers - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Kayaking - Whitewater	100.0%	1.8
Bicycling - Paved Road	73.2%	1.3
Hiking	71.8%	1.3
Bicycling - Single Track	64.4%	1.2
Kayaking - Recreation/Sit-on-Top	61.2%	1.1
Kayaking - Touring/Sea	54.4%	1.0
Canoeing	47.1%	0.874
Bicycling - Dirt Road	45.3%	0.821
Trail Running	41.5%	0.747
Car Camping	36.9%	0.689
Rafting	37.6%	0.677
Camping (Away from Car)	23.1%	0.429
Backpacking	22.2%	0.408
Cross-Country/Nordic Skiing	19.5%	0.361
Climbing - Artificial Wall	18.0%	0.333
Fly-Fishing	13.3%	0.243
Bird Watching	12.0%	0.224
Snowshoeing	9.4%	0.169
Climbing - Natural Rock	7.5%	0.138
Telemark Skiing	6.8%	0.122
Climbing - Ice	*	NA

* = Less than 1%

KAYAKING REGIONAL PROFILE YEAR 2003

In 2003 kayaking (all) Participants are geographically dispersed. Near equal percentages of kayakers (all) live in the South (27%), West (27%), Northeast (27%), and North Central (20%) regions of the U.S.

Within the specific kayaking formats, geographical differences are revealed. Whitewater kayakers are most likely to live in the South (35%). Recreation/sit-on-top kayakers live in all regions, but are slightly less likely to call the North Central home. Touring/sea kayakers tend to live in one of two regions – West (26%) and Northeast (29%).



OUTDOOR RECREATION PARTICIPATION STUDY

RAFTING

"Have you gone rafting?"

RAFTING

Headlines

- Participant activity in rafting during 2003 remains unchanged from 2002 levels, but remains well-below the activity level of 2001
- The year 2003 Participant population equals **10.3 million** Americans 16 and older
- Enthusiast activity is also consistent with 2002 levels – revealing a population of **2 million** Enthusiasts.
- Participants generated a total of 21 million rafting outings in 2003; 12 million outings were sourced by Enthusiasts

Participants went rafting an average of two times in 2003.

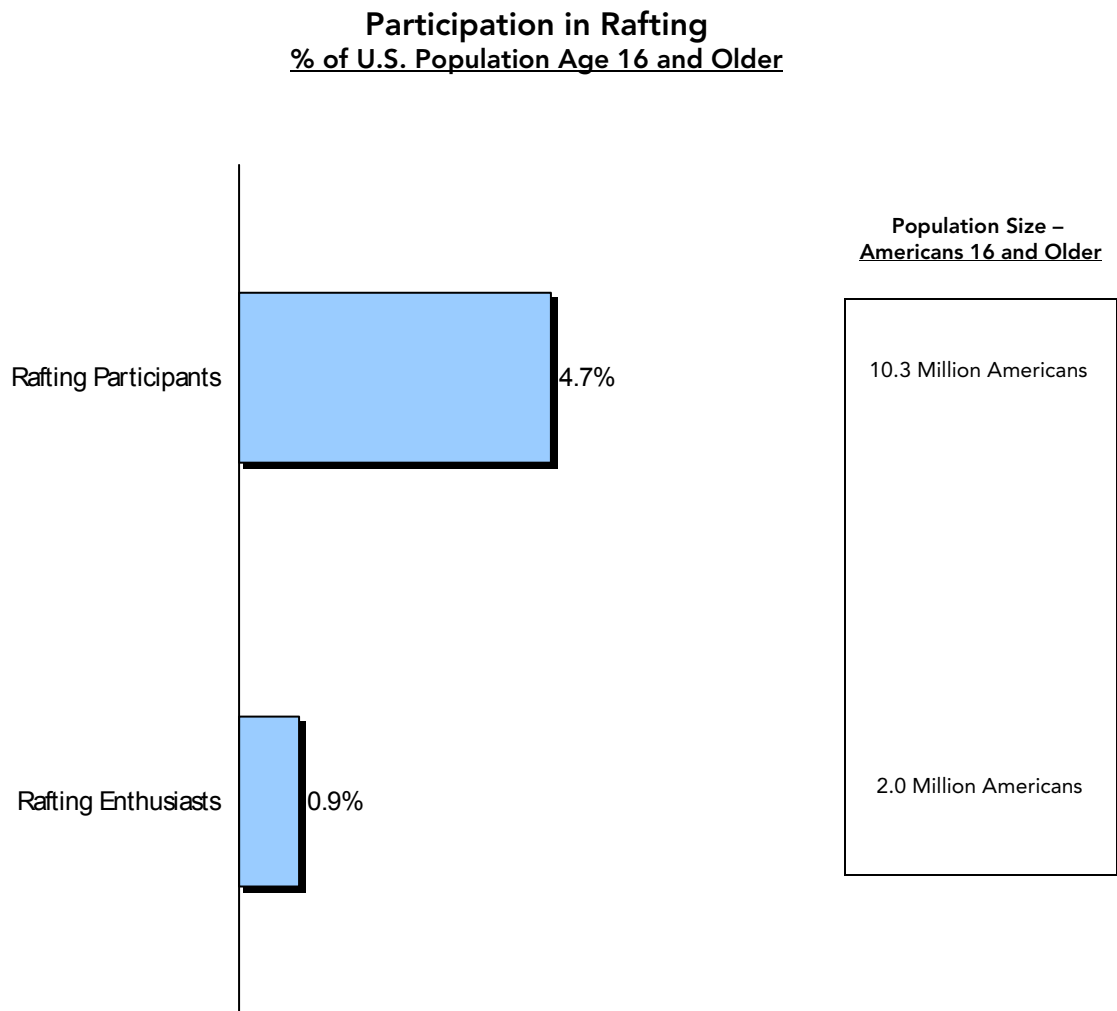
One-half (53%) of Participants went rafting less than the average number of times (one outing) and 14% went rafting more than average (three or more times).

- Americans participating in rafting during 2003 tend to be young, male and Caucasian
- The 2003 Participant population reports a mean household income among the most affluent of any Participant population
- In 2003, rafting Participants are most likely to live in the South region – a geographic representation that is higher than in 2001
- The most active rafters during 2003 are concentrated in the West and Northeast regions of the U.S.
- Nearly one-half of rafters also went canoeing in 2003 – a crossover population that exceeds five million Americans 16 and older

RAFTING PARTICIPANT & ENTHUSIAST LEVELS IN YEAR 2003

In 2003, the number of Americans 16 and older who went rafting exceeds 10 million or 4.7% of the general U.S. population.

Participation in rafting three or more times during 2003 yields a population of 2 million rafting Enthusiast.



RAFTING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:

Rafting remains a popular human powered water activity and although rafting participation is greater than in 1998, '99 and 2000, gains noted several years ago have not been maintained.

Short-term Perspective (Compared to 2002):

Participant activity in rafting remains primarily unchanged from 2002. More than 10 million Americans 16 and older went rafting during 2003.

The percentage of rafters who participated in the activity at the highest frequency levels (three or more times) in 2003 remains aligned with 2002 levels and reveals 2 million Enthusiasts.

Three-Year Perspective (Compared to 2001):

Involvement with rafting in 2003 shows a decline in participation from 2001's high-water participation mark.

The percentage of rafting Enthusiasts among the population of Americans 16 and older is unchanged when 2001 and 2003 are compared. However, frequency is temperamental over those years and depicts a flux in commitment.

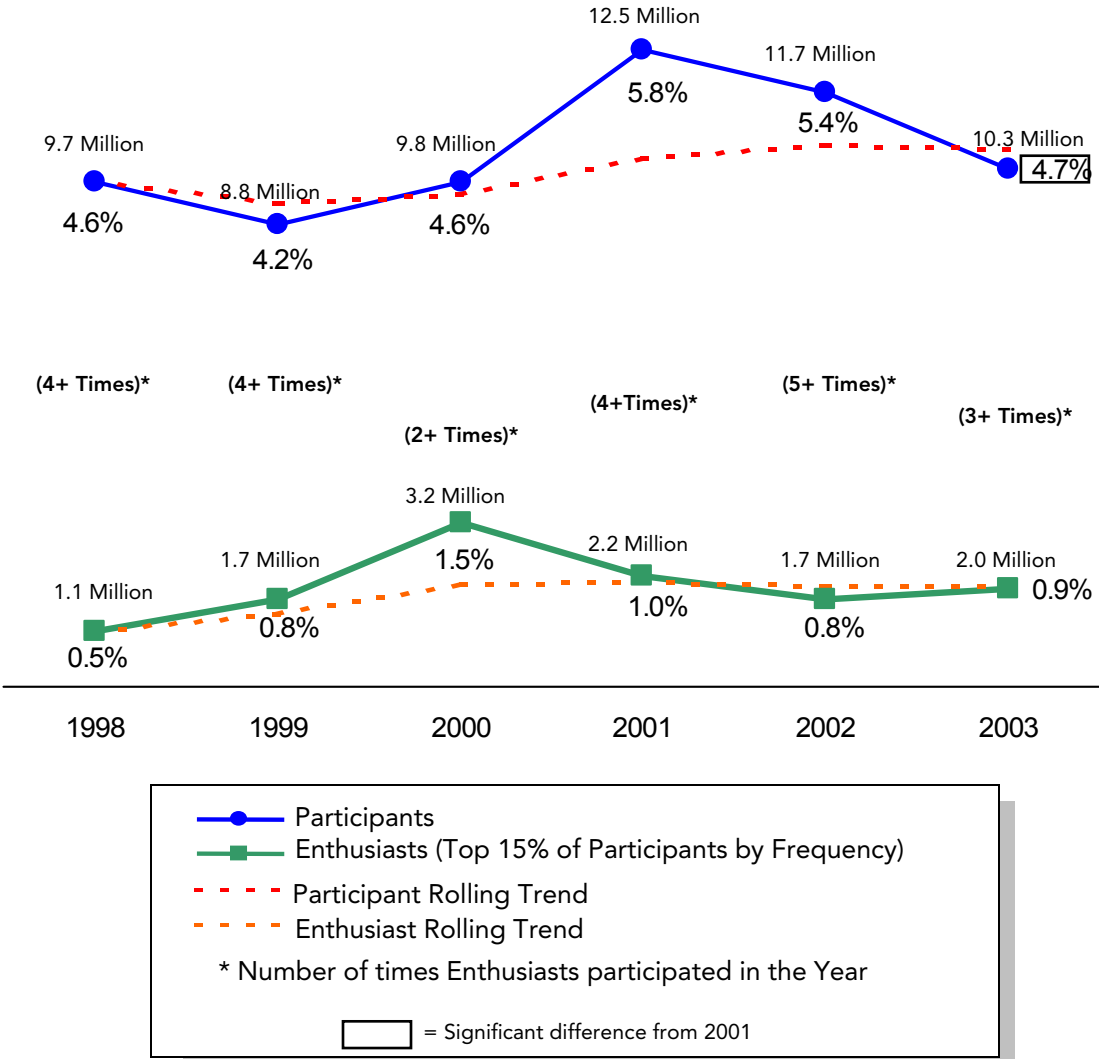
Long-term Perspective (Compared to 1998):

Participation in rafting is aligned with the activity reported six years ago, and the population of Enthusiasts has nearly doubled.

Cumulative Perspective (Rolling Trend):

Rolling trend Participant and Enthusiast levels reveal steady, yet modest, growth.

Participation in Rafting
% of U.S. Population Age 16 and Older

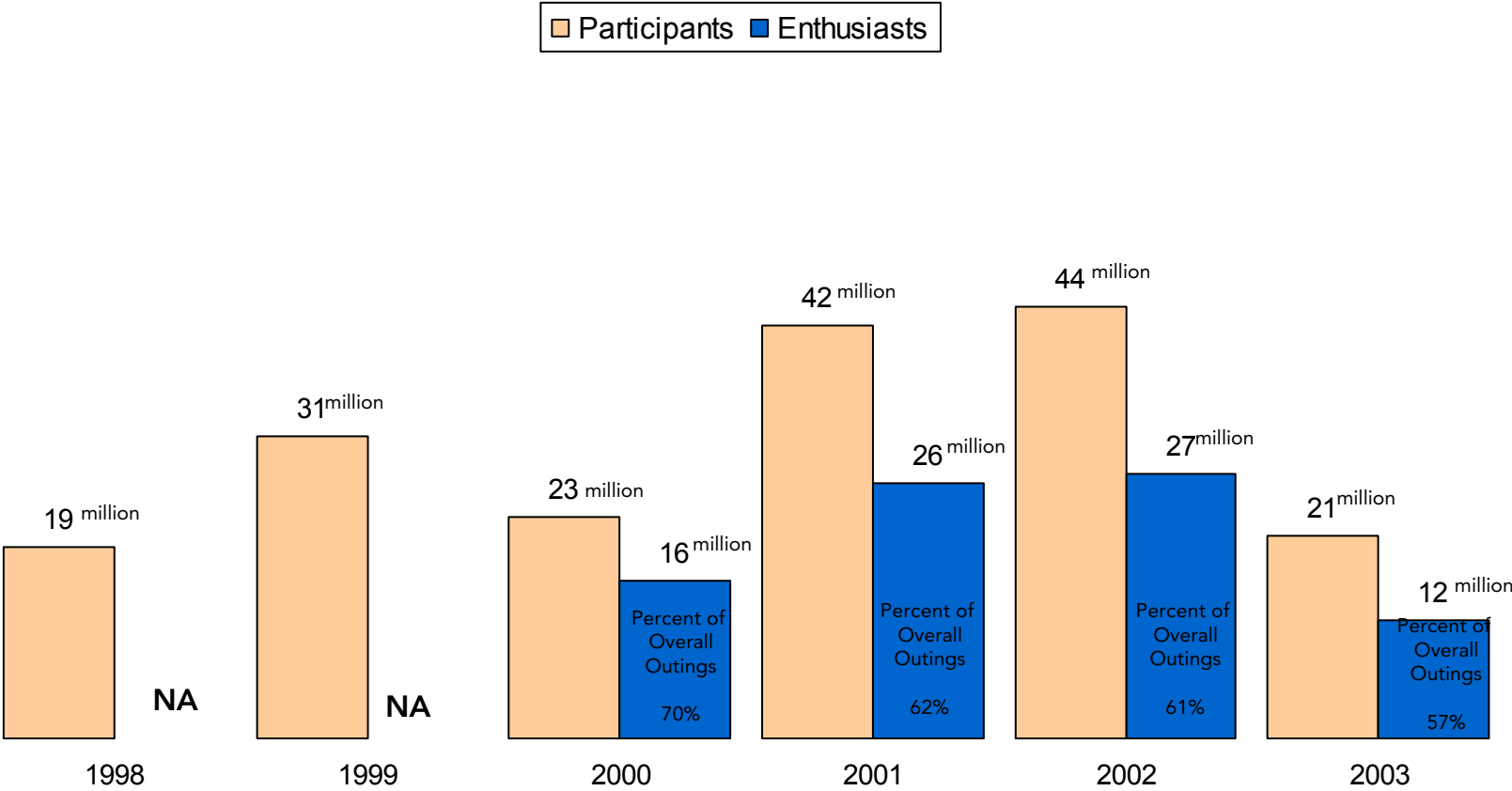


RAFTING TOTAL NUMBER OF OUTINGS PER YEAR*

Americans 16 and older generated a total of 21 million rafting outings during 2003 – well-below the record number of outings reported in 2001 (42 million) and 2002 (44 million). The decline in rafting outings during 2003 is the result of fewer Americans 16 and older participating in the activity and fewer outings taken during the year by Participants.

During 2003 Enthusiasts accounted for 21 million rafting outings, or more than one-half (58%) of total outings taken during the year.

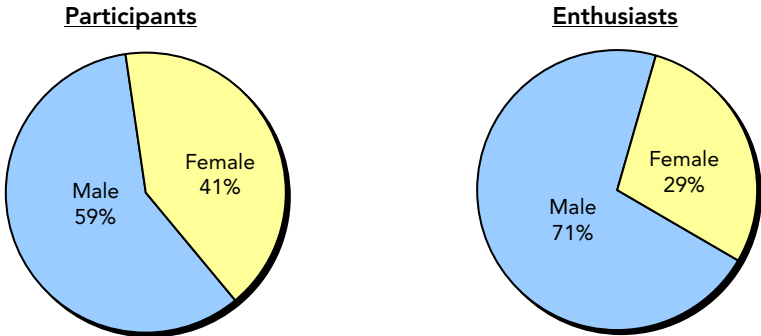
Rafting Outings in Each Year



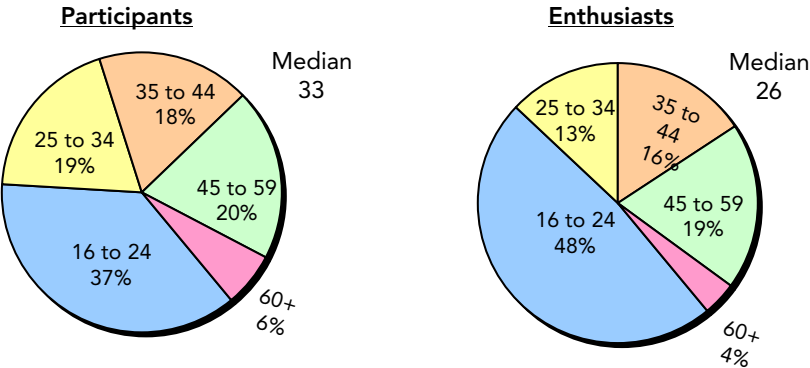
* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went rafting each year

RAFTING DEMOGRAPHIC PROFILE

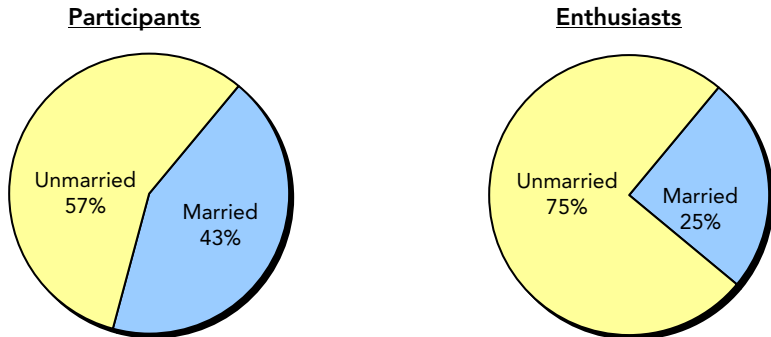
GENDER



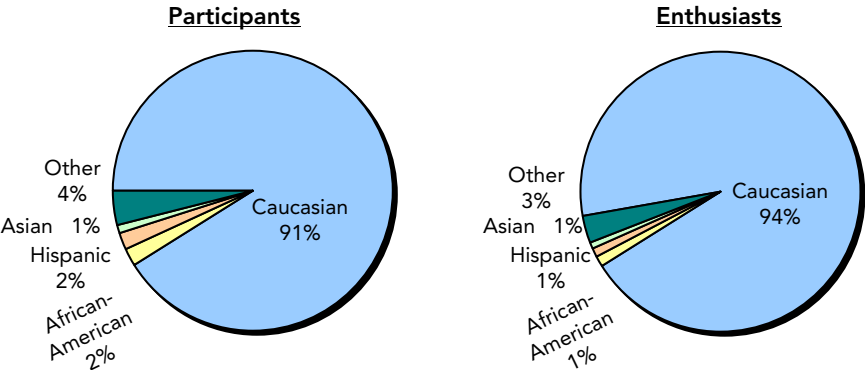
AGE



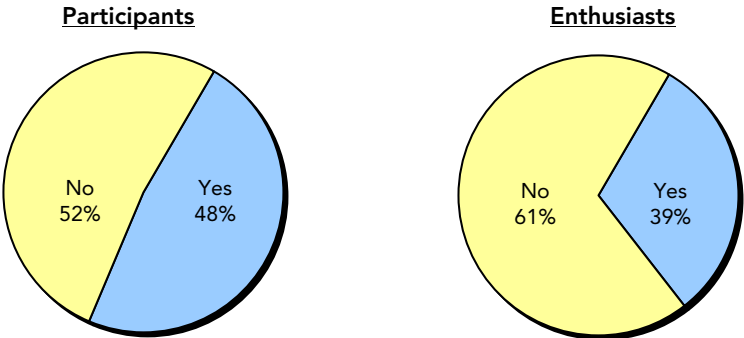
MARITAL STATUS



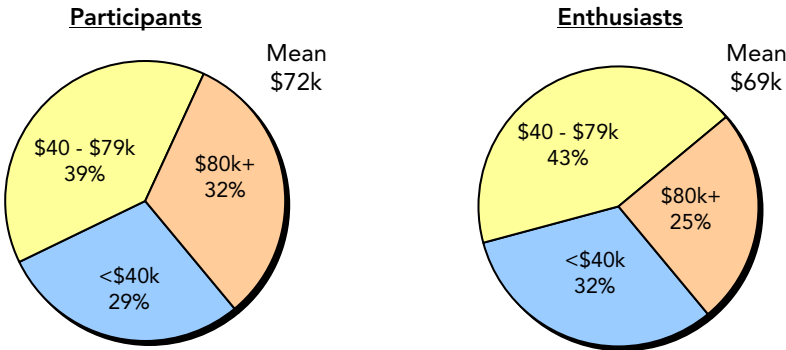
ETHNICITY



PRESENCE OF CHILDREN <18 in HOUSEHOLD



HOUSEHOLD INCOME



RAFTING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- As in recent years, year 2003 rafting Participants tend to be male (59%) and young (56% between the ages of 16 and 34).
- In 2003, rafting Participants are nearly universally Caucasian (91%).
- The majority (71%) of year 2003 rafters report household incomes of \$40,000 or more – yielding a mean household income among the most affluent of any Participant population (\$72,000).
- Compared to 2001, year 2003 rafting Participants are more likely to live in the South region of the U.S; less likely to live in the West.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	60%	52%	51%	62%	59%	59%
Female	40%	48%	49%	38%	41%	41%
Age						
16 to 24	39%	30%	43%	40%	35%	37%
25 to 34	19%	21%	19%	21%	19%	19%
35 to 44	16%	27%	21%	22%	20%	18%
45+	26%	22%	18%	17%	26%	26%
Marital Status						
Married	40%	53%	32%	34%	40%	43%
Unmarried	60%	47%	68%	66%	60%	57%
Ethnicity						
Caucasian	85%	94%	87%	87%	89%	91%
African-American	3%	1%	4%	6%	3%	2%
Hispanic	7%	4%	7%	5%	3%	2%
Asian	2%	*	1%	1%	4%	1%
Children <18						
Yes	45%	51%	57%	41%	46%	48%
Household Income						
<\$40k	NA	23%	38%	43%	30%	29%
\$40k - \$79k	NA	33%	39%	42%	34%	39%
\$80k+	NA	23%	22%	15%	36%	32%
Region						
Northeast	15%	10%	7%	24%	14%	21%
South Central	45%	34%	39%	27%	38%	35%
North Central	22%	19%	24%	18%	20%	22%
West	19%	37%	31%	32%	28%	22%

 = Significant difference from 2001

RAFTING DEMOGRAPHIC PROFILE TRENDS OF ENTHUSIASTS

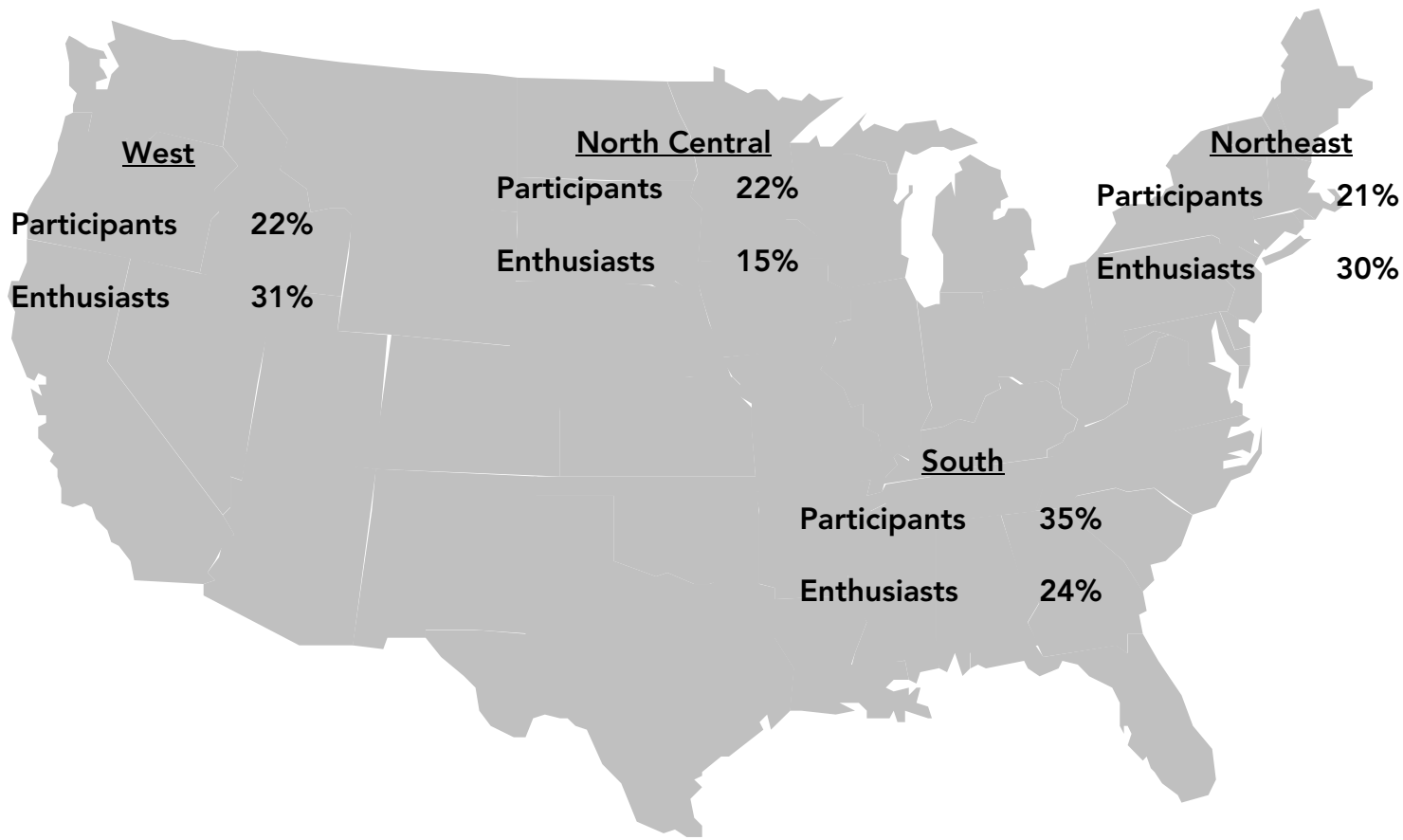
- In the extension of a trend first revealed in 2002, the 2003 rafting Enthusiast population skews heavily male (71%). This gender profile is in contrast to the more balanced gender profile of the 2000 and 2001 Enthusiast populations.
- In 2003, the age breakdown of rafting Enthusiasts returned to a more typical youthful profile. Nearly one-half (48%) of Enthusiasts are between the ages of 16 and 24. The median age of rafting Enthusiasts in 2003 is 26; compared to 29.5 in 2001.
- As a group, rafting Enthusiasts are nearly universally Caucasian (94%).

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	NA	NA	50%	59%	73%	71%
Female	NA	NA	41%	50%	27%	29%
Age						
16 to 24	NA	NA	46%	44%	32%	48%
25 to 34	NA	NA	16%	20%	18%	13%
35 to 44	NA	NA	22%	22%	18%	16%
45+	NA	NA	15%	16%	32%	23%
Marital Status						
Married	NA	NA	30%	20%	39%	25%
Unmarried	NA	NA	70%	80%	61%	75%
Ethnicity						
Caucasian	NA	NA	81%	80%	95%	94%
African-American	NA	NA	5%	5%	1%	1%
Hispanic	NA	NA	8%	13%	3%	1%
Asian	NA	NA	*	*	*	1%
Children <18						
Yes	NA	NA	57%	44%	32%	39%
Household Income						
<\$40k	NA	NA	49%	58%	32%	32%
\$40k - \$79k	NA	NA	38%	27%	36%	43%
\$80k+	NA	NA	13%	15%	32%	25%
Region						
Northeast	NA	NA	8%	10%	13%	30%
South Central	NA	NA	39%	28%	30%	24%
North Central	NA	NA	19%	21%	26%	15%
West	NA	NA	33%	41%	30%	31%

RAFTING REGIONAL PROFILE YEAR 2003

In 2003, more than one-third (35%) of rafting Participants live in a state located in the South region of the U.S. – a higher geographic representation than from the West (22%), North Central (22%) and Northeast (21%) regions.

The most active rafters (Enthusiasts) in 2003 live in the West (31%) and the Northeast (30%) regions of the U.S.



RAFTING CROSSOVER ACTIVITY IN YEAR 2003

Rafters participated in a variety of water and land based activities in 2003.

Among rafters, crossover participation is highest in hiking (74.0%) and paved road bicycling (64.8%).

Nearly one-half (49.3%) of rafters also went canoeing in 2003 – a crossover population that exceeds five million Americans 16 and older.

Activities	Rafters - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Rafting	100.0%	10.3
Hiking	74.0%	7.6
Bicycling - Paved Road	64.8%	6.6
Canoeing	49.3%	5.1
Car Camping	44.0%	4.5
Bicycling - Dirt Road	39.1%	4.0
Trail Running	36.9%	3.8
Bicycling - Single Track	36.7%	3.8
Camping (Away from Car)	28.2%	2.9
Backpacking	26.8%	2.7
Fly-Fishing	16.4%	1.7
Kayaking - Recreation/St-on-Top	14.4%	1.5
Cross-Country/Nordic Skiing	12.2%	1.3
Bird Watching	11.2%	1.1
Climbing - Natural Rock	9.6%	1.0
Climbing - Artificial Wall	9.0%	0.941
Showshoeing	7.7%	0.793
Kayaking - Touring/Sea	7.5%	0.758
Kayaking - Whitewater	6.7%	0.677
Telemark Skiing	6.1%	0.630
Climbing - Ice	1.5%	0.155

SNOWSHOEING

Headlines

- Following several years of dynamic growth, participation in snowshoeing remained unchanged from 2002 to 2003 – yielding a Participant population of **5.9 million** Americans 16 and older
- The number of Enthusiasts surpassed the one million mark in 2003, just above 2002 levels (**1.1 million**)
- Participant and Enthusiast activity has increased dynamically since 1998
- Participants generated a total of 24 million snowshoeing outings in 2003

The average number of times that Participants went snowshoeing in 2003 is four.

More than two-thirds (69%) of Participants went snowshoeing less than the average number of times (one to three outings) and 20% went snowshoeing more than average. 39% of Participants went snowshoeing only one time in 2003

- The majority of 2003 snowshoeing Participant population is comprised of males
- The age profile of snowshoeing Participants in 2003 reveals the all-ages appeal of the activity – the median age is 34
- In 2003 the majority of snowshoers live in two regions – West and Northeast
- Hiking is the most popular crossover activity among year 2003 snowshoers – revealing a population of nearly four million snowshoers who also went hiking during the year

OUTDOOR RECREATION PARTICIPATION STUDY

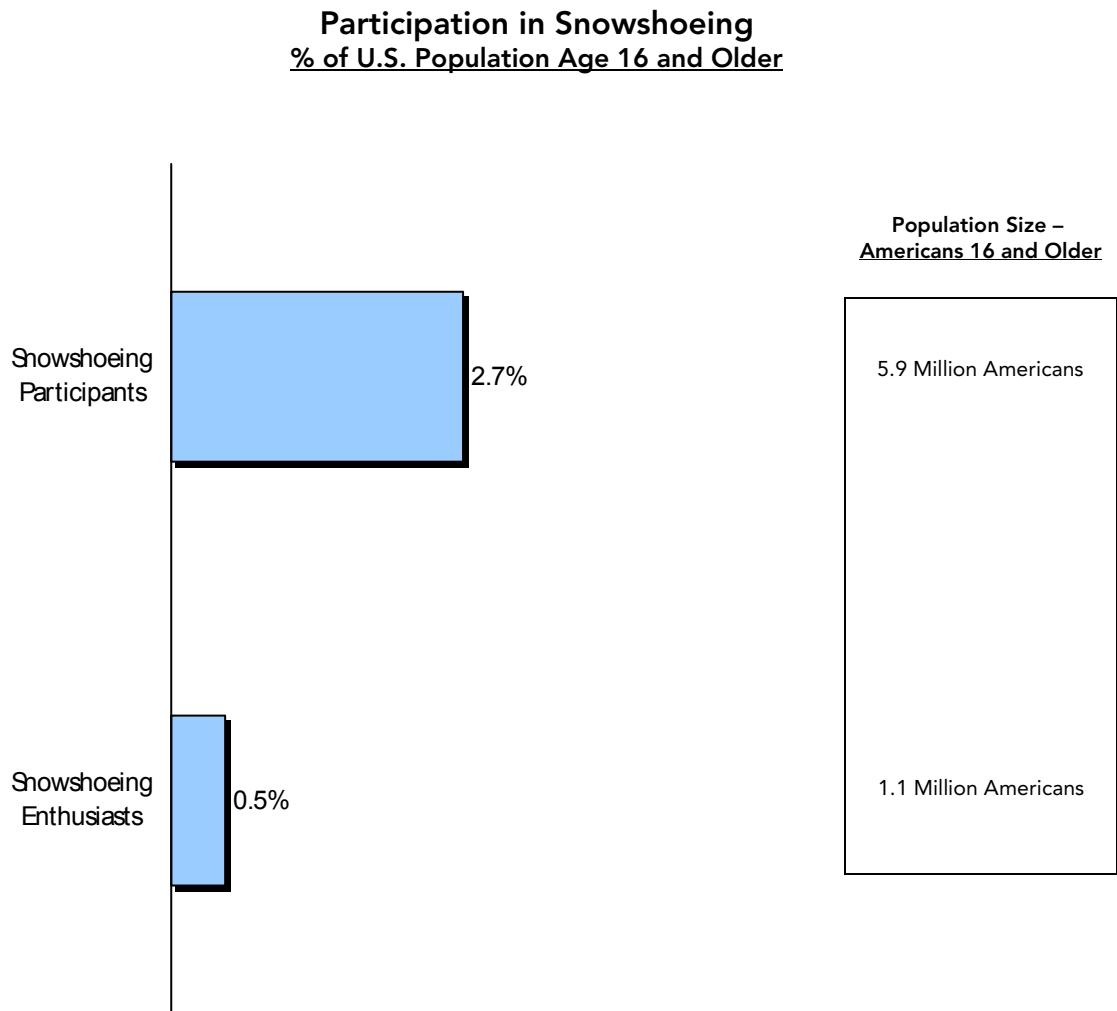
SNOWSHOEING

"Have you gone snowshoeing?"

SNOWSHOEING PARTICIPANT & ENTHUSIAST LEVELS IN 2003

Nearly 6 million Americans 16 and older went snowshoeing in 2003 - 2.7% of the U.S. population 16 and older.

The number of Enthusiast snowshoers (those who snowshoed six or more times in the past year) pushed past the one million mark in 2003.



SNOWSHOEING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:
Few human powered activities have experienced as consistent growth in the past six years as snowshoeing.

Short-term Perspective (Compared to 2002):
In 2003, snowshoeing participation has slowed to the point where Participant levels are static from the previous year.

The incidence of snowshoers participating within the top 15% of activity levels in 2003 yields an Enthusiast population that tops one million – on par with the 2002 population.

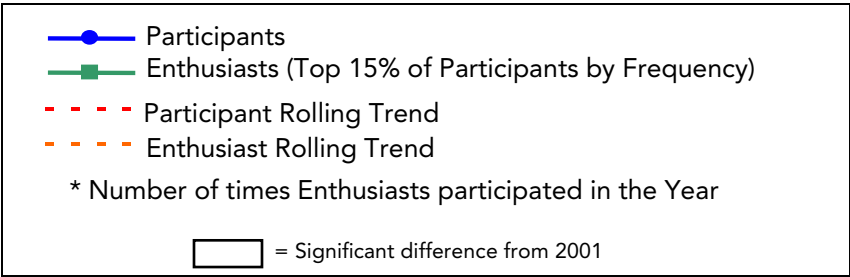
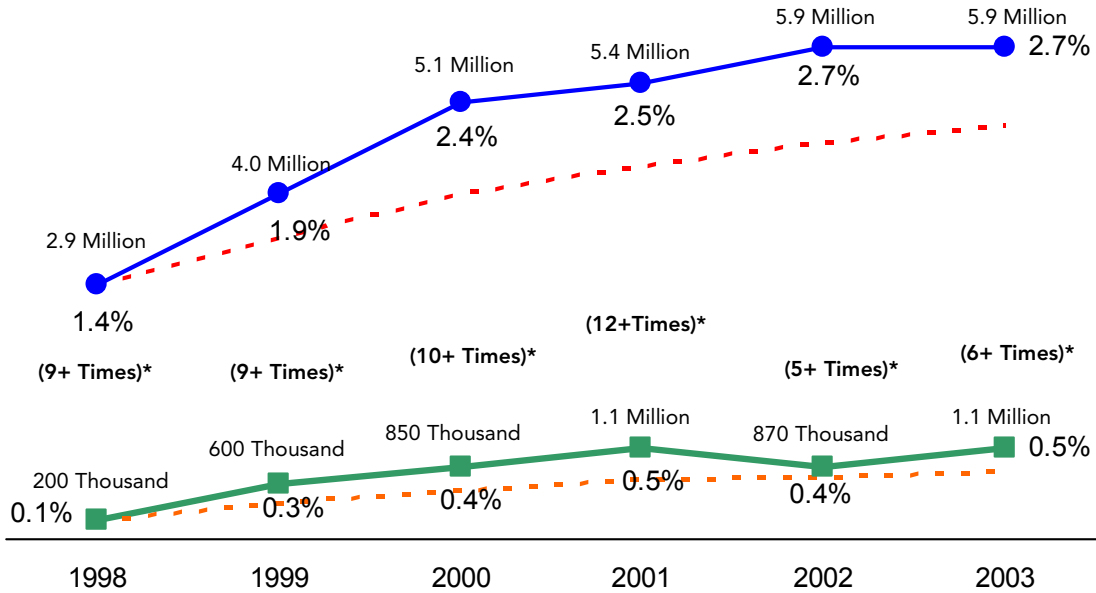
Three-Year Perspective (Compared to 2001):
Participation in snowshoeing has begun to level off. The number of Enthusiasts has increased, but the frequency in which snowshoers are getting out has dramatically shifted from 2001 – a sign, new entrants into the sport are creating an Enthusiast population.

Long-term Perspective (Compared to 1998):
The year 2003 Participant population of 5.9 million Americans is double the 2.9 million reported in 1998.

Although modest in number, the incidence of Enthusiast snowshoers has increased dynamically (+400%) since 1998.

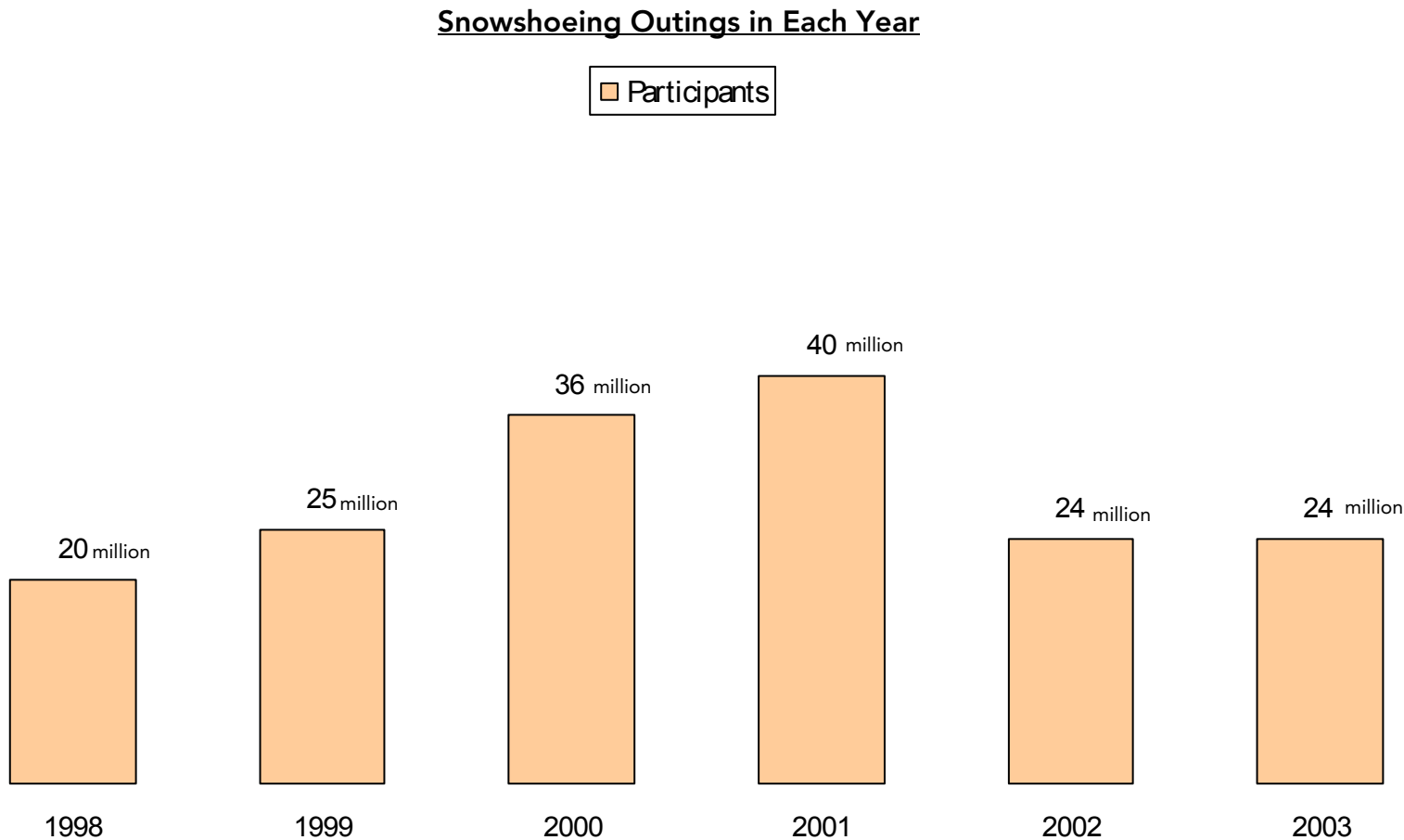
Cumulative Perspective (Rolling Trend):
Rolling trend Participant and Enthusiast levels reveal steady growth over the past six years.

Participation in Snowshoeing
% of U.S. Population Age 16 and Older



SNOWSHOEING TOTAL NUMBER OF OUTINGS PER YEAR*

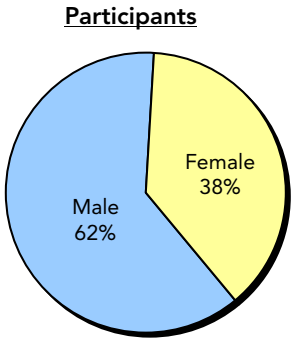
During 2003, snowshoeing Participants generated a total of 24 million outings. The number of outings reported in 2003 is on par with the previous year, but well-below the years of 2000 and 2001 when the activity was enjoying dynamic growth and frequent participation.



* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went snowshoeing each year

SNOWSHOEING DEMOGRAPHIC PROFILE

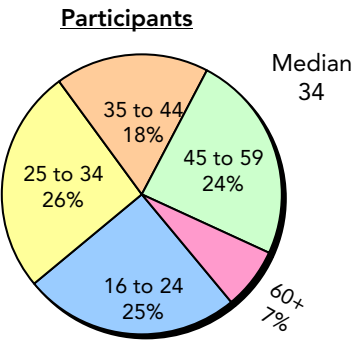
GENDER



Enthusiasts

NA

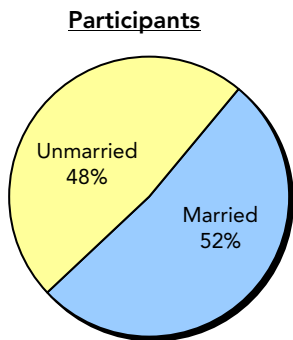
AGE



Enthusiasts

NA

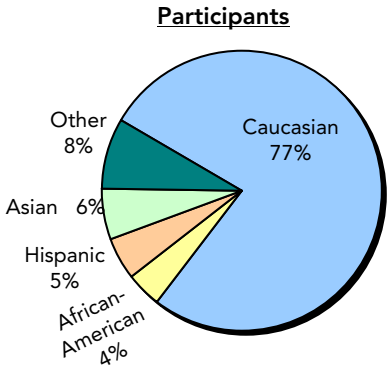
MARITAL STATUS



Enthusiasts

NA

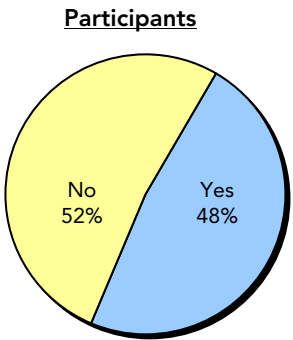
ETHNICITY



Enthusiasts

NA

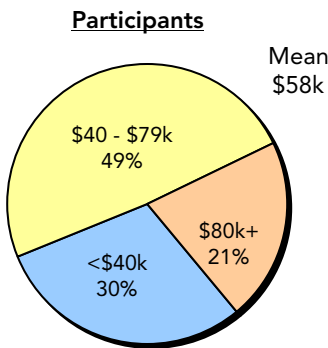
PRESENCE OF CHILDREN <18 in HOUSEHOLD



Enthusiasts

NA

HOUSEHOLD INCOME



Enthusiasts

NA

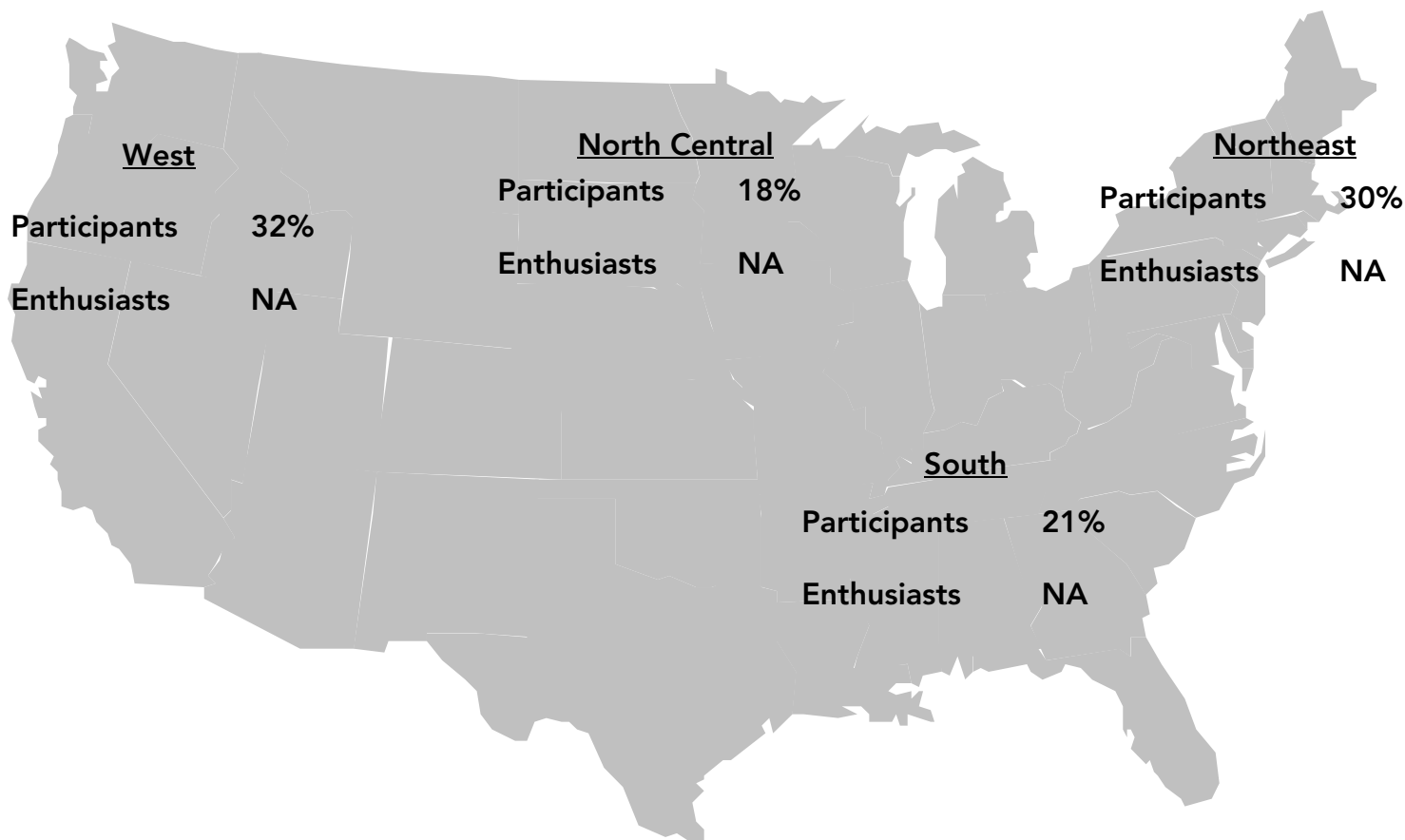
SNOWSHOEING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- Male snowshoers comprise the majority (62%) of the Participant population – a composition aligned with the historical gender profile of the Participant population since 1998.
- Snowshoers in year 2003 were of all ages – a balanced profile that has remained relatively constant since 1998. In year 2003 one-half of Participants are between the ages of 16 and 34 (51%).
- In 2003, more than three-quarters (77%) of snowshoeing Participants are Caucasian, revealing a significant shift from the late 1990's when the populations had little ethnic diversity.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	65%	66%	64%	56%	67%	62%
Female	35%	34%	36%	44%	33%	38%
Age						
16 to 24	30%	20%	24%	32%	30%	25%
25 to 34	25%	25%	15%	27%	19%	26%
35 to 44	20%	18%	25%	17%	20%	18%
45+	25%	38%	36%	24%	31%	31%
Marital Status						
Married	50%	52%	48%	48%	51%	52%
Unmarried	52%	48%	50%	52%	49%	48%
Ethnicity						
Caucasian	90%	91%	86%	75%	81%	77%
African-American	1%	2%	5%	9%	9%	4%
Hispanic	5%	3%	3%	5%	9%	5%
Asian	4%	2%	3%	7%	1%	5%
Children <18						
Yes	50%	29%	39%	35%	39%	48%
Household Income						
<\$40k	NA	23%	32%	39%	35%	30%
\$40k - \$79k	NA	39%	39%	36%	35%	49%
\$80k+	NA	25%	30%	25%	31%	21%
Region						
Northeast	30%	21%	10%	27%	25%	30%
South Central	30%	14%	21%	14%	25%	21%
North Central	25%	23%	31%	22%	15%	18%
West	15%	41%	38%	37%	35%	32%

SNOWSHOEING REGIONAL PROFILE YEAR 2003

In year 2003, the majority (62%) of snowshoers live in two regions of the U.S. – West (32%) and Northeast (30%).



SNOWSHOEING CROSSOVER ACTIVITY IN YEAR 2003

During year 2003, the majority (62.9%) of snowshoeing Participants also went hiking – revealing a crossover population of nearly four million (3.7) Americans 16 and older.

Snowshoers also report notable levels of crossover participation in paved road bicycling (52.6%), dirt road bicycling (38.2%), canoeing (37.9%), and trail running (35.3%).

Activities	Snowshoers - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Snowshoeing	100.0%	5.9
Hiking	62.9%	3.7
Bicycling - Paved Road	52.6%	3.1
Bicycling - Dirt Road	38.2%	2.3
Canoeing	37.9%	2.3
Trail Running	35.3%	2.1
Cross-Country/Nordic Skiing	33.7%	2.0
Car Camping	31.9%	1.9
Bicycling - Single Track	31.9%	1.9
Camping (Away from Car)	26.4%	1.6
Backpacking	24.1%	1.4
Fly-Fishing	18.9%	1.1
Telemark Skiing	16.0%	0.945
Bird Watching	13.6%	0.800
Rafting	13.2%	0.793
Kayaking - Recreation/St-on-Top	12.6%	0.759
Climbing - Artificial Wall	7.2%	0.442
Kayaking - Touring/Sea	5.1%	0.302
Climbing - Natural Rock	4.9%	0.290
Kayaking - Whitewater	2.9%	0.169
Climbing - Ice	2.0%	0.118

OUTDOOR RECREATION PARTICIPATION STUDY

TELEMARK SKIING

"Have you gone Telemark skiing?"

TELEMARK SKIING

Headlines

Note: The description of Telemark skiing was revised in 2003 to include the following – “downhill with Telemark bindings that allow a free-heelled skiing experience”.

- Participant and Enthusiast Telemark activity is flat from 2002 levels, but up significantly from 1998 levels
- The 2003 Participant population equals **4.2 million** Americans 16 and older
- The 2003 Enthusiast population includes **659 thousand** Americans 16 and older
- Americans who went Telemark skiing in 2003 report the highest household income of any human powered activity population
- Participants generated a total of 21 million Telemark skiing outings in 2003

Participants went Telemark skiing five times on average in 2003.

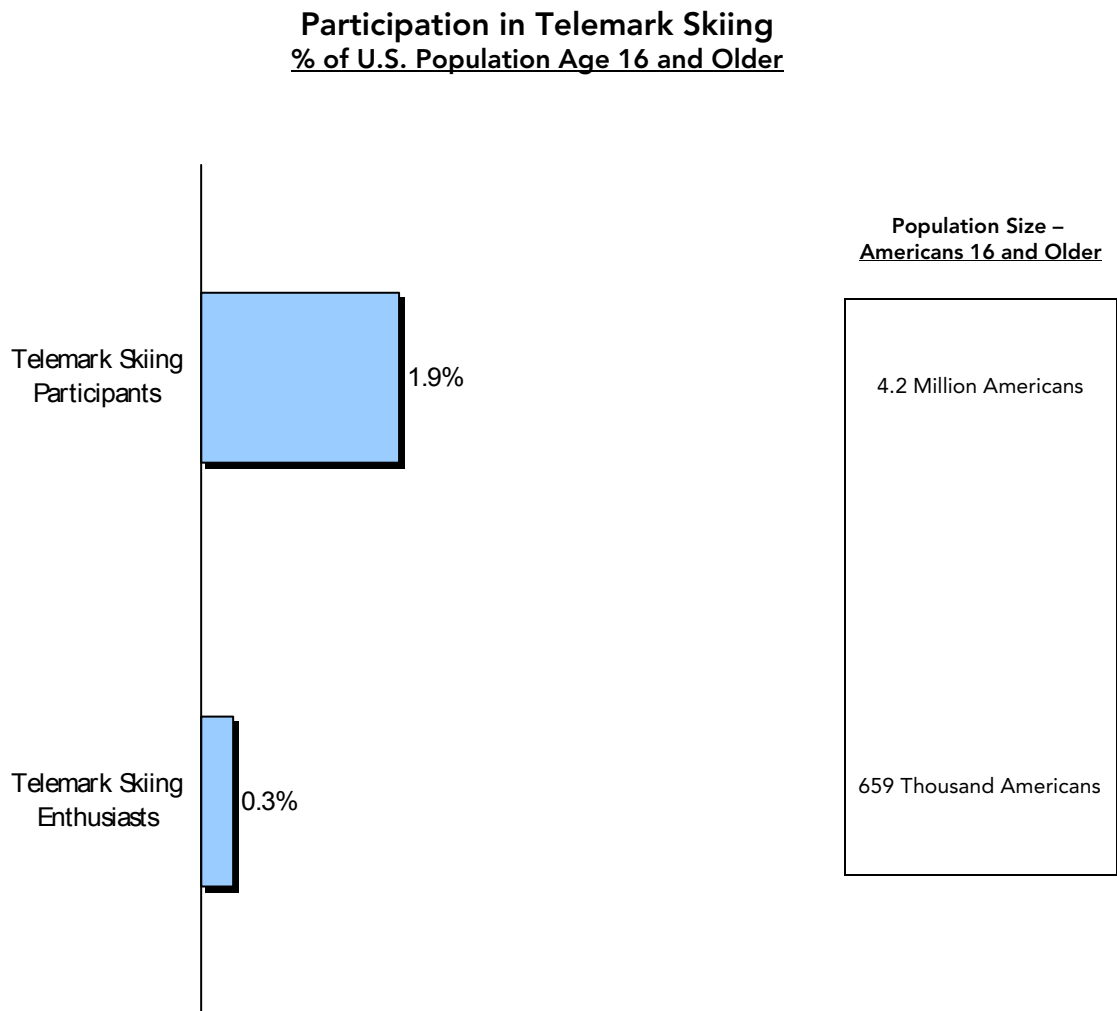
79% of Participants went Telemark skiing less than the average number of times (one to four outings) and 11% went Telemark skiing six or more times. 35% of Participants went Telemark skiing only one time in 2003

- The majority of year 2003 Participants are males, are between the ages of 16 and 34 and Caucasian
- Americans 16 and older who went Telemark skiing in year 2003 are geographically dispersed, but are most likely to live in the South, the West and the North Central regions.
- During 2003, crossover participation in cross-country/Nordic skiing is strong among Telemark skiers - a crossover population equal to one million Americans 16 and older

TELEMARK SKIING PARTICIPANT & ENTHUSIAST LEVELS IN 2003

More than four million (4.2) Americans 16 and older went Telemark skiing in 2003 (downhill with Telemark bindings that allow a free-heeled skiing experience) – or 1.9% of Americans 16 and older.

Among the general population, the incidence of Americans 16 and older participating in Telemark skiing six or more times yields a population of 659 thousand Enthusiasts.



TELEMARK SKIING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:
Participation in Telemark skiing has been wide-ranging over the years, due in part to refinements in the Telemark skiing and cross-country/Nordic skiing definitions used in the survey.

Short-term Perspective (Compared to 2002):
More than four million Americans 16 and older went Telemark skiing in 2003, a participation level that is primarily unchanged from 2002.

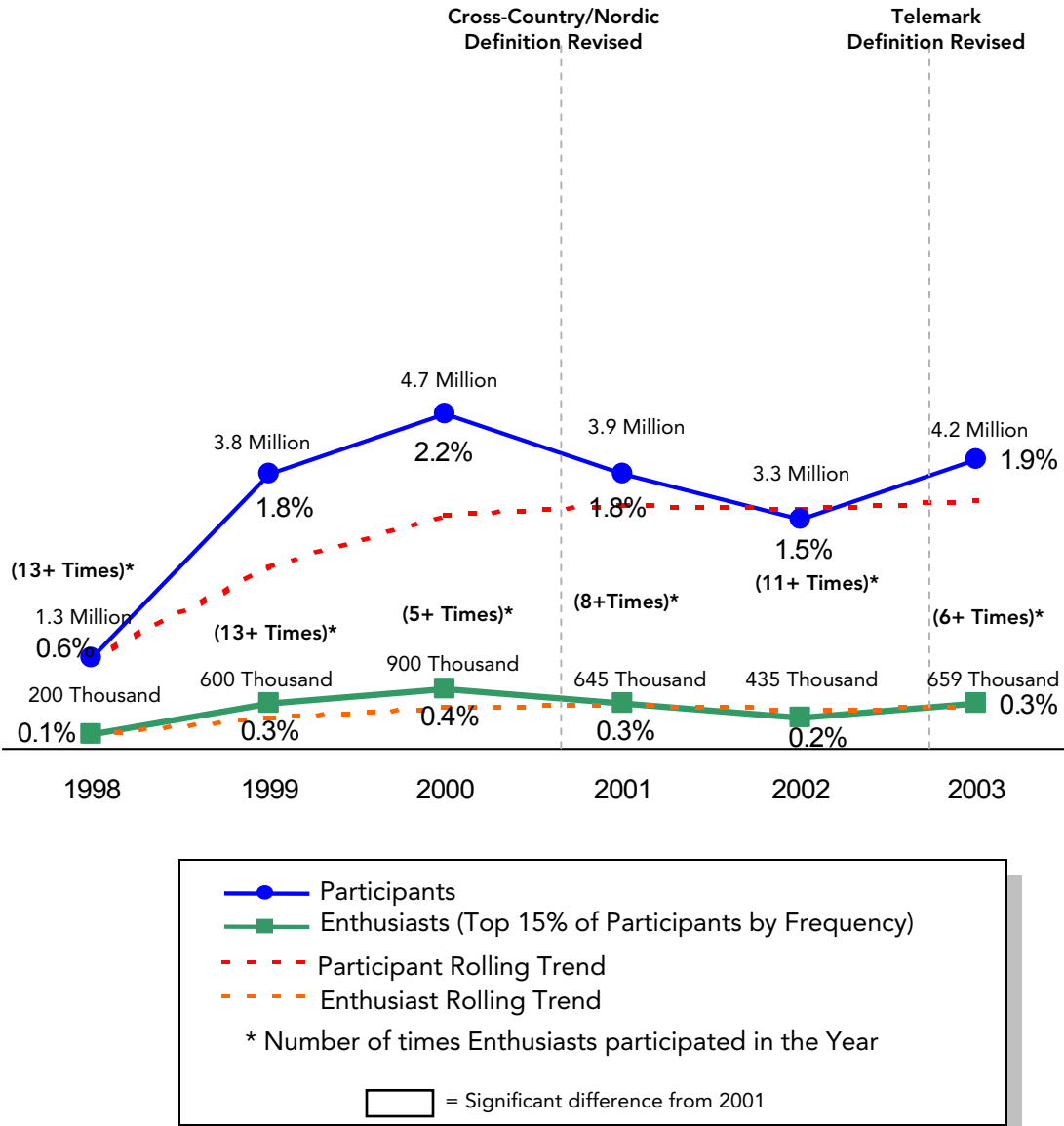
In 2003, Enthusiast levels remain stable from the year before. The number of Americans participating in Telemark skiing at the highest frequency levels equals 659 thousand.

Three-Year Perspective (Compared to 2001):
In 2003, Participant and Enthusiast activity is unchanged from the levels reported in 2001.

Long-term Perspective (Compared to 1998):
Compared to 1998, Participant and Enthusiast levels have increased significantly.

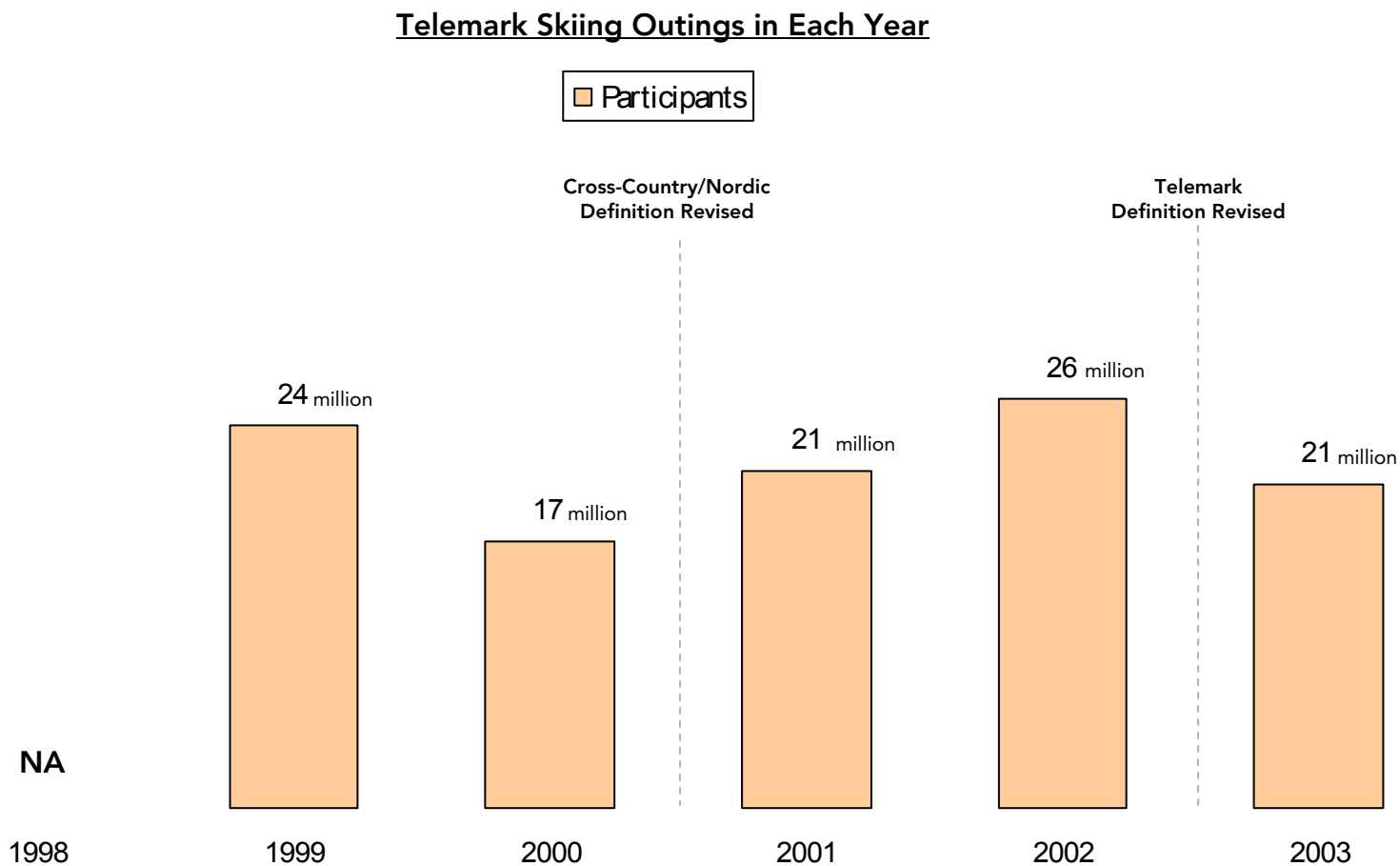
Cumulative Perspective (Rolling Trend):
Rolling trend results show a leveling off of Participant levels since year 2000. Rolling trend Enthusiast levels have remained primarily stable over the past six years. The fluctuation in frequency is relative to the change in definition.

Participation in Telemark Skiing
% of U.S. Population Age 16 and Older



TELEMARK SKIING TOTAL NUMBER OF OUTINGS PER YEAR*

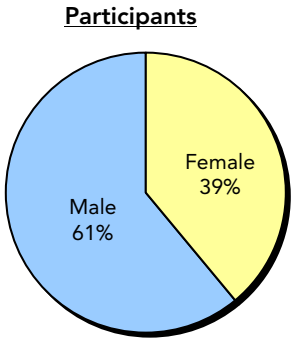
Americans 16 and older generated a total of 21 million Telemark skiing outings during 2003. Although a greater number of Americans participated in the activity in 2003, the total number of outings is lower than in 2002 – a result of the decline in average outings reported in 2003 (5 outings) compared to 2002 (8 outings).



* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went Telemark skiing each year

TELEMARK SKIING DEMOGRAPHIC PROFILE

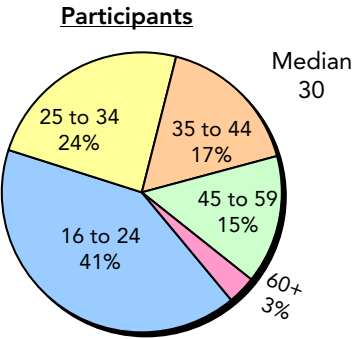
GENDER



Enthusiasts

NA

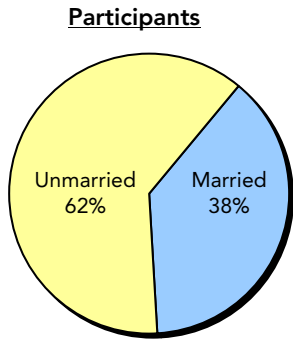
AGE



Enthusiasts

NA

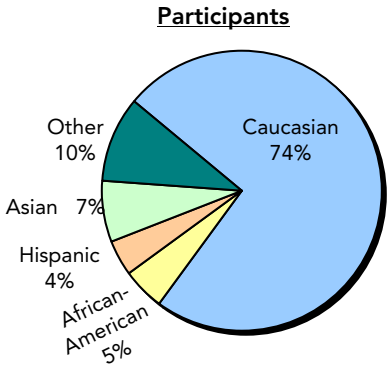
MARITAL STATUS



Enthusiasts

NA

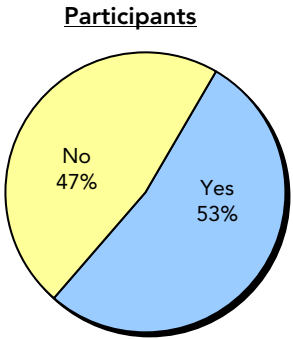
ETHNICITY



Enthusiasts

NA

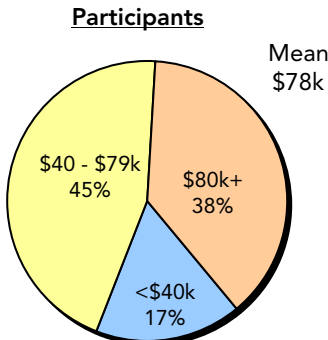
PRESENCE OF CHILDREN <18 in HOUSEHOLD



Enthusiasts

NA

HOUSEHOLD INCOME



Enthusiasts

NA

TELEMARK SKIING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

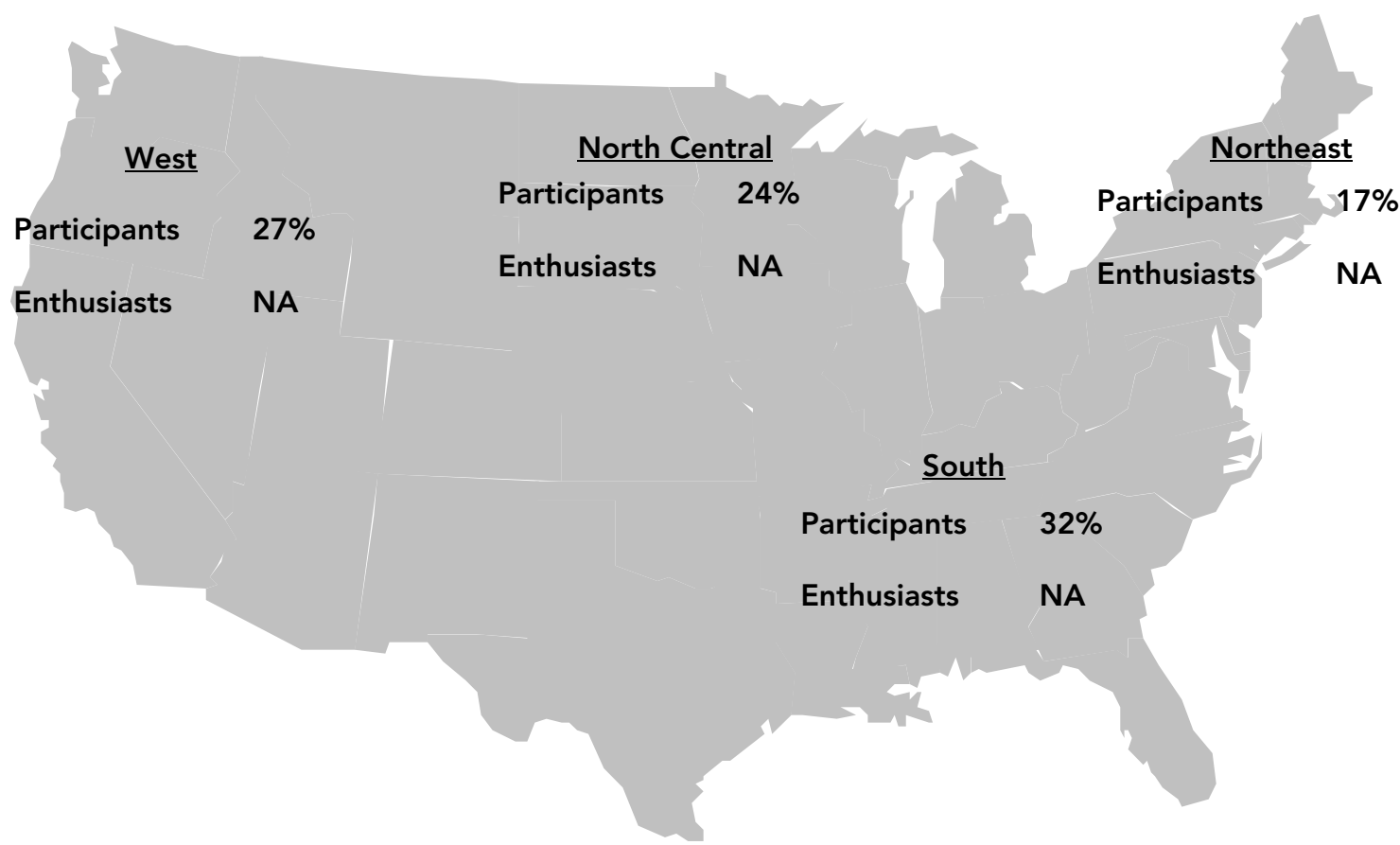
- Demographically, the year 2003 Telemark skiing Participant population has a distinct profile. The majority of Participants are male (61%), between the ages of 16 and 34 (65%), unmarried (32%) and Caucasian (74%).
- Compared to 2001, the year 2003 Telemark Participant population is less likely to be comprised of Caucasians. Asians are more strongly represented within the population.
- The Telemark Participant population is particularly affluent. 38% of year 2003 Participants report household incomes of \$80,000 or more – yielding the highest mean household incomes among all Participant populations (\$78,000).

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	NA	69%	58%	58%	66%	61%
Female	NA	31%	42%	42%	34%	39%
Age						
16 to 24	NA	16%	37%	40%	42%	41%
25 to 34	NA	29%	20%	25%	17%	24%
35 to 44	NA	20%	33%	17%	25%	17%
45+	NA	22%	22%	18%	16%	18%
Marital Status						
Married	NA	53%	43%	38%	36%	38%
Unmarried	NA	47%	57%	62%	64%	62%
Ethnicity						
Caucasian	NA	83%	82%	88%	78%	74%
African-American	NA	4%	4%	1%	8%	5%
Hispanic	NA	6%	13%	4%	10%	4%
Asian	NA	2%	*	3%	2%	7%
Children <18						
Yes	NA	44%	48%	42%	53%	53%
Household Income						
<\$40k	NA	20%	22%	36%	41%	17%
\$40k - \$79k	NA	35%	42%	38%	35%	45%
\$80k+	NA	29%	27%	26%	24%	38%
Region						
Northeast	NA	27%	9%	28%	30%	17%
South Central	NA	29%	28%	16%	27%	32%
North Central	NA	20%	30%	19%	12%	24%
West	NA	24%	32%	36%	30%	27%

= Significant difference from 2001

TELEMARK SKIING REGIONAL PROFILE YEAR 2003

Americans 16 and older who went Telemark skiing in year 2003 are geographically dispersed, but are most likely to live in the South (32%), the West (27%) and the North Central (24%) regions.



TELEMARK SKIING CROSSOVER ACTIVITY IN YEAR 2003

Telemark Participants most often stay fit by bicycling on paved roads (56.5%) and hiking (49.1%).

One in five (20.9%) Telemark skiers also participated in cross-country/Nordic skiing in 2003 – a crossover population equal to 878 thousand Americans 16 and older.

Activities	Telemark Skiers - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Telemark Skiing	100.0%	4.2
Bicycling - Paved Road	56.5%	2.4
Hiking	49.1%	2.1
Car Camping	38.0%	1.6
Trail Running	36.7%	1.5
Bicycling - Single Track	32.7%	1.4
Bicycling - Dirt Road	29.7%	1.2
Canoeing	22.9%	1.0
Camping (Away from Car)	22.8%	1.0
Showshoeing	22.5%	0.945
Cross-Country/Nordic Skiing	20.9%	0.878
Fly-Fishing	16.9%	0.710
Backpacking	16.7%	0.701
Climbing - Artificial Wall	16.0%	0.672
Rafting	15.0%	0.630
Kayaking - Recreation/St-on-Top	13.2%	0.554
Climbing - Natural Rock	11.6%	0.487
Bird Watching	10.6%	0.445
Kayaking - Touring/Sea	4.9%	0.206
Climbing - Ice	3.8%	0.160
Kayaking - Whitewater	2.9%	0.122

OUTDOOR RECREATION PARTICIPATION STUDY

TRAIL RUNNING

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

TRAIL RUNNING

Headlines

- Participant activity in 2003 is on par with the previous year – nearly **38 million** Participants – but remains down from the high-water mark measured in 2001
- Enthusiast activity is flat, yielding a population of nearly **5.7 million** runners who hit the trail 49 or more times during the year
- Participants generated a total of 1 billion trail running outings in 2003; 713 million outings were sourced by Enthusiasts

The average number of times that Participants went trail running in 2003 is 29.

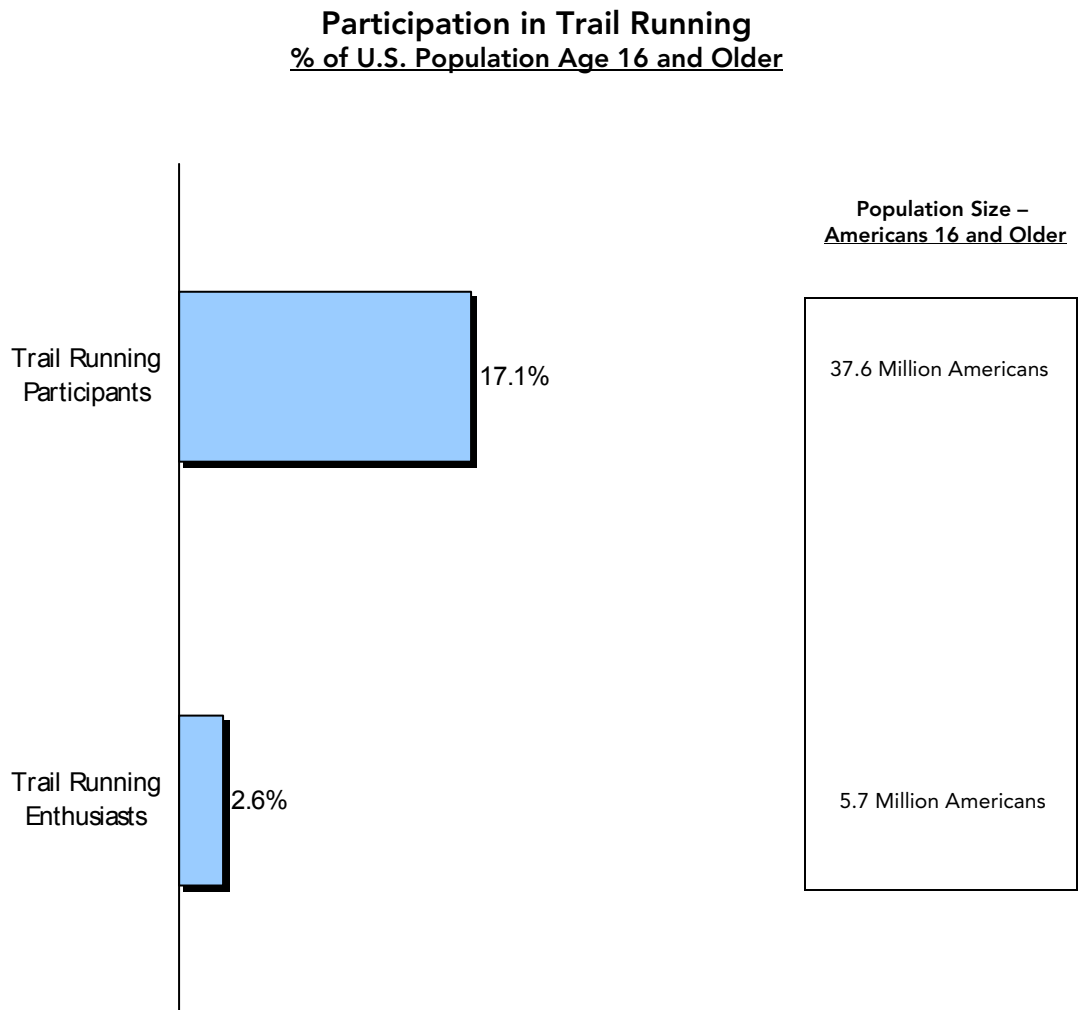
Three-quarters of Participants went trail running less than the average number of times (one to 28 outings) and 13% went trail running more than average. 9% of Participants went trail running only one time in 2003

- The demographic profile of Participants remains distinct – males, young (particularly 16 to 24) and Caucasian
- Enthusiast activity in 2003 is sourced by Americans between the ages of 16 and 24
- Participants are most likely to live in the South region of the U.S.
- Trail runners who participate at the highest frequency levels are most likely to live in the South and West – climates that are well-suited to year-round activity
- During 2003, the majority of trail runners also participated in hiking and paved road bicycling

TRAIL RUNNING PARTICIPANT & ENTHUSIAST LEVELS IN YEAR 2003

Trail running is among the most popular human powered activities - nearly one in five (17.1%) Americans 16 and older report running on a trail during 2003.

The population of Enthusiasts (those who ran on an unpaved trail 49 or more times during the year) includes nearly six million Americans 16 years and older.



TRAIL RUNNING PARTICIPANT & ENTHUSIAST TRENDS

Overall Perspective:
Americans 16 and older have a strong interest in trail running, but recent trends reveal an erosion in participation.

Short-term Perspective (Compared to 2002):
Year 2003 trail running Participant levels are consistent with 2002 levels, as nearly 38 million Americans 16 and older hit the trails for a run.

The incidence of Enthusiast activity in 2003 remains on par with the previous year; identifying nearly six million Americans who ran the trails 49 or more times during the year.

Three-Year Perspective (Compared to 2001):
In 2003, Participant activity is down from the record high level identified in 2001.

The incidence of Enthusiast trail runners among the American population 16 and older remains unchanged.

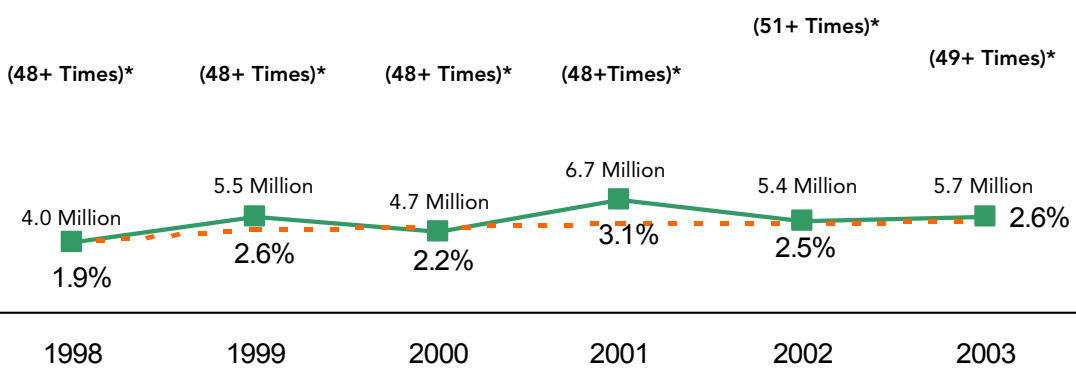
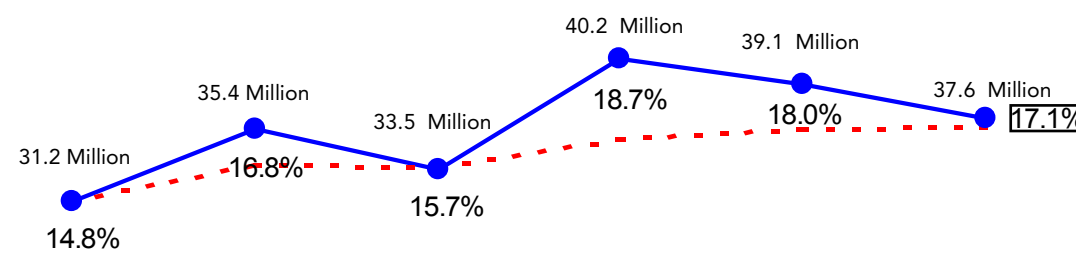
Long-term Perspective (Compared to 1998):
Participant levels have increased since 1998 – a gain of 16%.

Trail running has experienced a 37% increase in Enthusiast activity since first measured in 1998.

Cumulative Perspective (Rolling Trend):
Rolling trend results show gradual growth in Participant levels since year 1998.

Rolling trend Enthusiast levels have remained primarily stable over the past six years.

Participation in Trail Running
% of U.S. Population Age 16 and Older



●

Participants

■

Enthusiasts (Top 15% of Participants by Frequency)

- - -

Participant Rolling Trend

- - -

Enthusiast Rolling Trend

* Number of times Enthusiasts participated in the Year

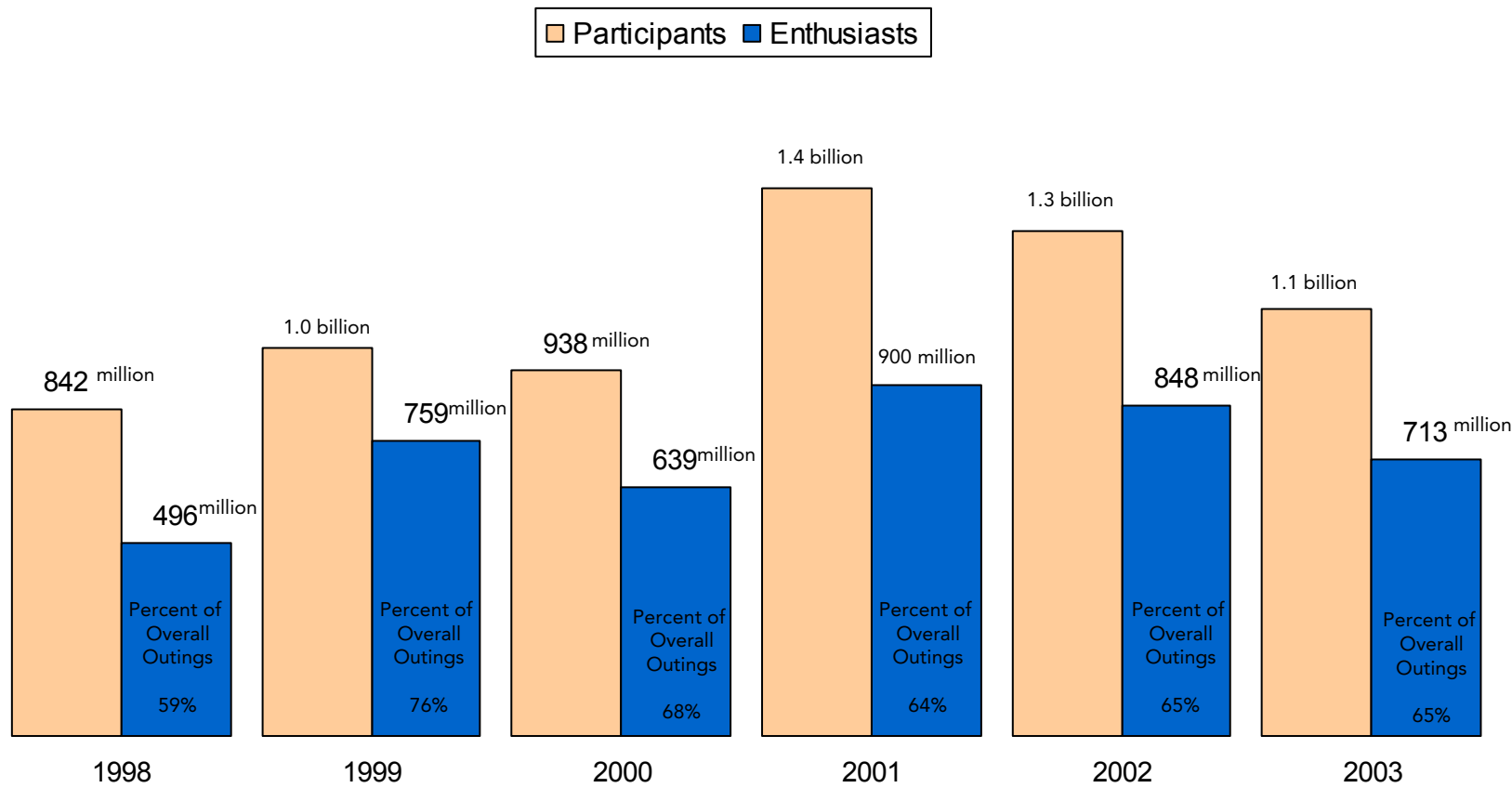
= Significant difference from 2001

TRAIL RUNNING TOTAL NUMBER OF OUTINGS PER YEAR*

Americans 16 and older generated a total of **1.1 billion trail running outings** during 2003. The number of trail running outings is down from the record number of outings reported in 2001 (1.4 billion) and 2002 (1.3 billion), but remains higher than in 1998 (842 million). The lower number of total outings in 2003 is a result of an average number of outings in 2003 (29 outings) when compared to 2001(35) and 2002 (34).

During 2003 Enthusiasts accounted for 713 million trail running outings. The contribution of Enthusiasts is equal to nearly two-thirds (65%) of total trail running outings in 2003 – a share of outings that has been relatively flat since 2000 .

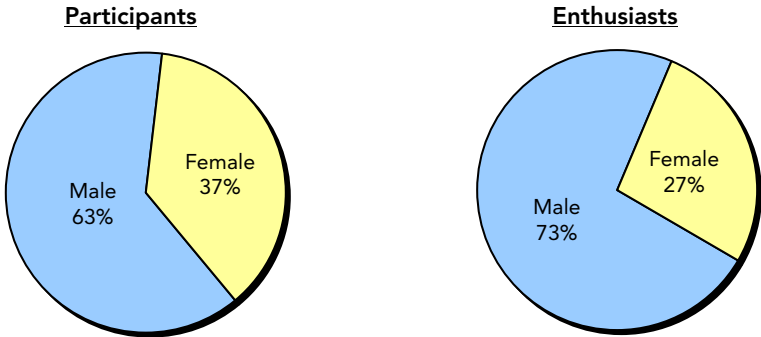
Trail Running Outings in Each Year



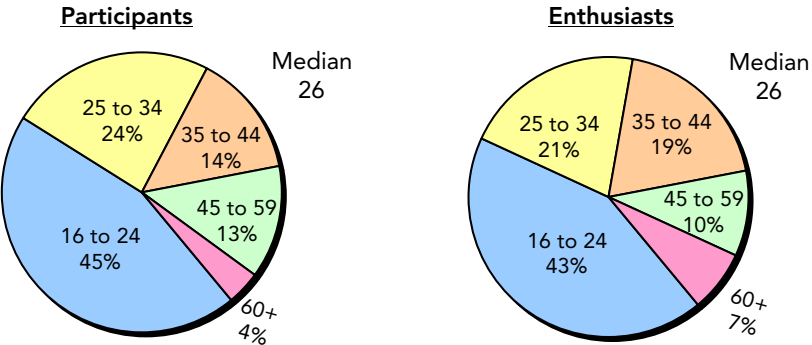
* Number of occasions is derived by multiplying the number of projected Participants/Enthusiasts by the average number of times Americans 16 and older went trail running each year

TRAIL RUNNING DEMOGRAPHIC PROFILE

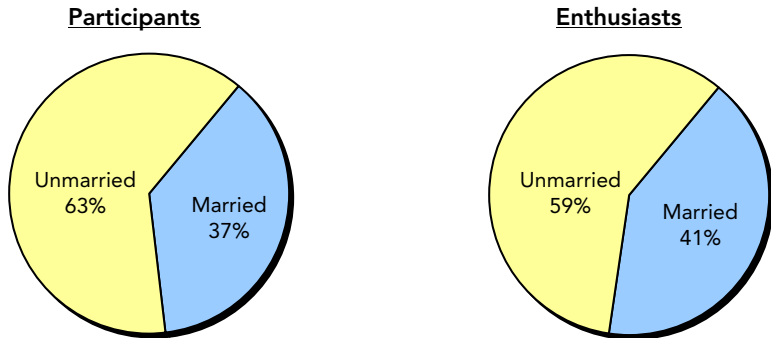
GENDER



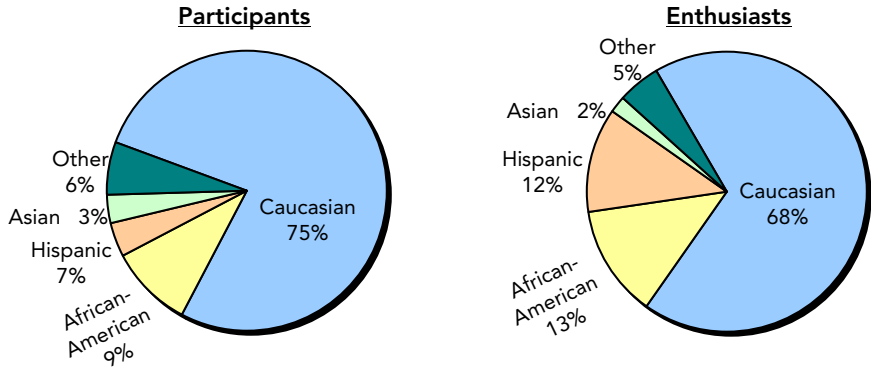
AGE



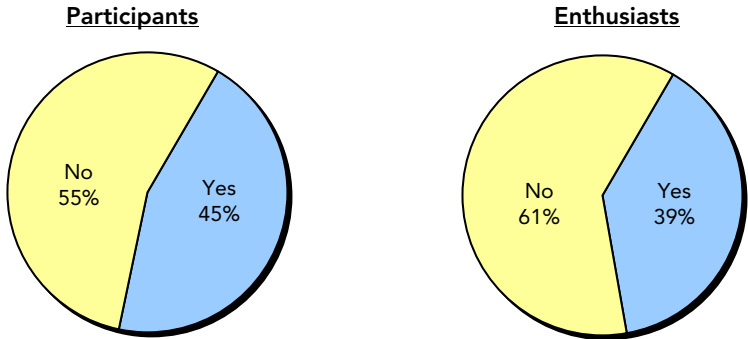
MARITAL STATUS



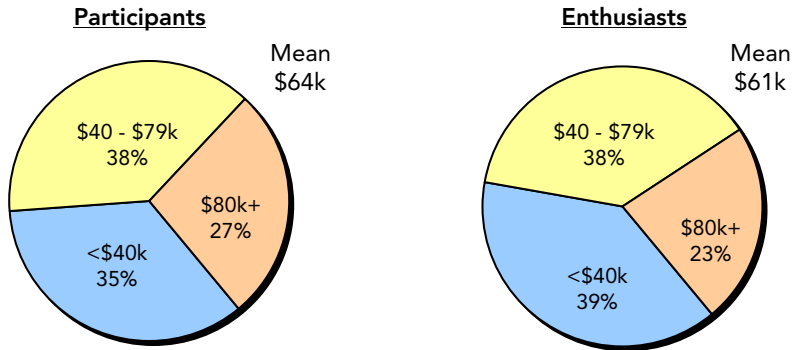
ETHNICITY



PRESENCE OF CHILDREN <18 in HOUSEHOLD



HOUSEHOLD INCOME



TRAIL RUNNING DEMOGRAPHIC PROFILE TRENDS OF PARTICIPANTS

- Males continue to comprise the majority (63%) of the trail running Participant population, extending a consistent trend since 1998.
- Since 2000, the trail running Participant population has experienced a growing representation of young Americans and the trend is continued in 2003. Nearly one-half (45%) of year 2003 Participants are between the ages of 16 and 24.
- Although three-quarters (75%) of Participants are Caucasian, the year 2003 Participant population reflects a measurable degree of ethnic diversity – African-Americans (9%) and Hispanics (7%).

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	55%	61%	61%	59%	62%	63%
Female	45%	39%	39%	41%	38%	37%
Age						
16 to 24	36%	34%	45%	43%	44%	45%
25 to 34	21%	24%	24%	27%	21%	24%
35 to 44	23%	20%	15%	16%	15%	14%
45+	20%	23%	16%	14%	20%	17%
Marital Status						
Married	41%	40%	36%	34%	38%	37%
Unmarried	59%	60%	64%	66%	62%	63%
Ethnicity						
Caucasian	80%	77%	74%	77%	78%	75%
African-American	9%	11%	10%	9%	9%	9%
Hispanic	7%	7%	10%	7%	7%	7%
Asian	4%	3%	3%	3%	3%	3%
Children <18						
Yes	49%	49%	53%	43%	49%	45%
Household Income						
<\$40k	NA	29%	37%	40%	36%	35%
\$40k - \$79k	NA	36%	37%	41%	38%	38%
\$80k+	NA	20%	26%	19%	26%	27%
Region						
Northeast	18%	15%	9%	20%	18%	19%
South Central	37%	38%	36%	31%	33%	35%
North Central	19%	20%	23%	19%	23%	18%
West	26%	27%	32%	30%	26%	28%

TRAIL RUNNING DEMOGRAPHIC PROFILE TRENDS OF ENTHUSIASTS

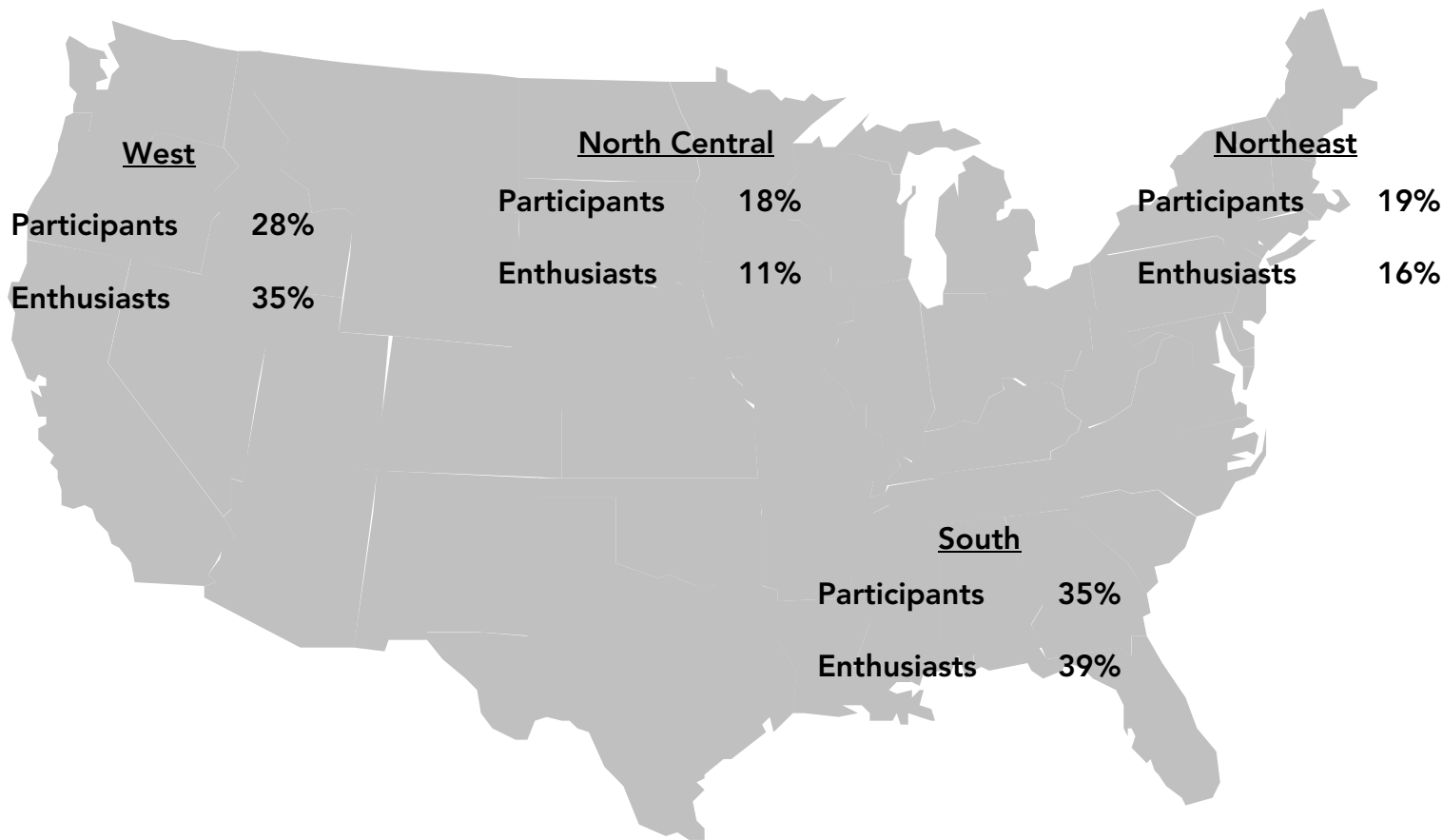
- Enthusiast trail runners tend to be male (73%) – a gender composition that has become more pronounced in the past two years.
- Younger Americans comprise the majority of the trail running Enthusiast population – two-thirds are between the ages of 16 and 34.
- The year 2003 Enthusiast population shows signs of emerging ethnic diversity. Representation of African-Americans (13%) and Hispanics (12%) is strong within the segment.

Dimension	1998	1999	2000	2001	2002	2003
Gender						
Male	55%	65%	64%	63%	73%	73%
Female	45%	35%	36%	37%	27%	27%
Age						
16 to 24	33%	37%	49%	33%	38%	43%
25 to 34	14%	17%	15%	30%	25%	21%
35 to 44	14%	14%	19%	23%	16%	19%
45+	38%	32%	17%	14%	21%	17%
Marital Status						
Married	45%	35%	29%	40%	38%	41%
Unmarried	55%	65%	71%	60%	62%	59%
Ethnicity						
Caucasian	78%	78%	72%	78%	82%	68%
African-American	10%	7%	11%	6%	7%	13%
Hispanic	7%	7%	6%	8%	8%	12%
Asian	3%	1%	4%	3%	1%	2%
Children <18						
Yes	41%	44%	56%	39%	39%	39%
Household Income						
<\$40k	NA	22%	34%	29%	36%	39%
\$40k - \$79k	NA	40%	35%	43%	44%	38%
\$80k+	NA	22%	31%	28%	20%	23%
Region						
Northeast	13%	19%	6%	27%	14%	16%
South Central	36%	33%	32%	29%	37%	39%
North Central	16%	15%	17%	18%	26%	18%
West	36%	32%	46%	26%	23%	35%

TRAIL RUNNING REGIONAL PROFILE YEAR 2003

In 2003, more than one-third (35%) of Participants call a state in the South home.

Enthusiast trail runners are most likely to live in regions that have weather that is conducive to year-round activity; the South (39%) and the West (35%)



TRAIL RUNNING CROSSOVER ACTIVITY IN YEAR 2003

Trail runners maintained their interest in human powered activities in year 2003 through a variety of activities – particularly hiking (61.3%) and paved road bicycling (57.9%).

Activities	Trail Runners - Crossover Participation Incidence	Size of Crossover Participation Population (Millions)
Trail Running	100.0%	37.6
Hiking	61.3%	23.0
Bicycling - Paved Road	57.9%	21.8
Bicycling - Single Track	40.7%	15.3
Bicycling - Dirt Road	38.7%	14.5
Car Camping	30.5%	11.5
Canoeing	18.8%	7.1
Camping (Away from Car)	16.8%	6.4
Backpacking	15.2%	5.7
Cross-Country/Nordic Skiing	10.9%	4.1
Bird Watching	10.2%	3.8
Rafting	10.1%	3.8
Climbing - Artificial Wall	10.0%	3.8
Fly-Fishing	8.3%	3.1
Kayaking - Recreation/St-on-Top	7.6%	2.9
Kayaking - Touring/Sea	7.6%	2.8
Climbing - Natural Rock	6.8%	2.6
Showshoeing	5.6%	2.1
Telemark Skiing	4.0%	1.5
Kayaking - Whitewater	2.0%	0.747
Climbing - Ice	0.6%	0.226

OUTDOOR RECREATION PARTICIPATION STUDY

ADVENTURE / SPORTS TRAVEL

"In 2003 did you take a vacation where the primary purpose was to experience an outdoor adventure or adventurous activity?"

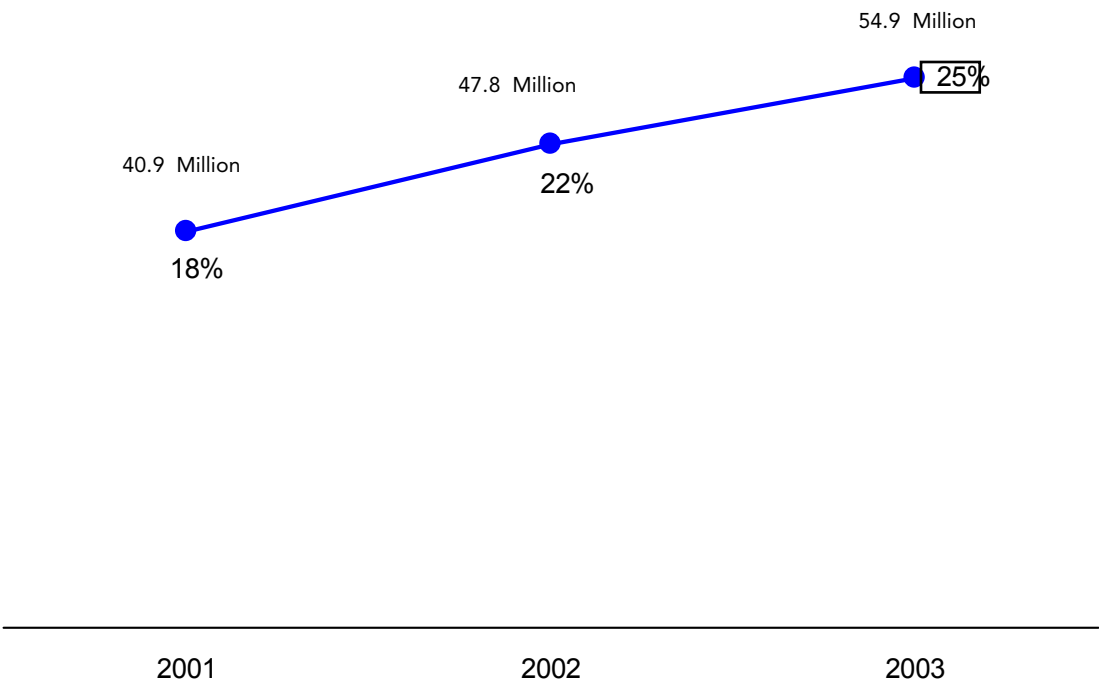
"What sport or recreational activity did you participate in?"

TOOK AN ADVENTURE / OUTDOOR ACTIVITY VACATION IN 2003*

Adventure/outdoor travel is on the rise. Travel activity has increased 14% in 2003 over the previous year and is up even more dynamically since 2001 (+39%).

One-quarter of Americans 16 and older took a vacation in 2003 that was specifically inspired by the opportunity to participate in an adventure or outdoor activity – equal to a traveling public of nearly 55 million Americans.

Adventure/Outdoor Activity Vacation in 2003
% of U.S. Population Age 16 and Older



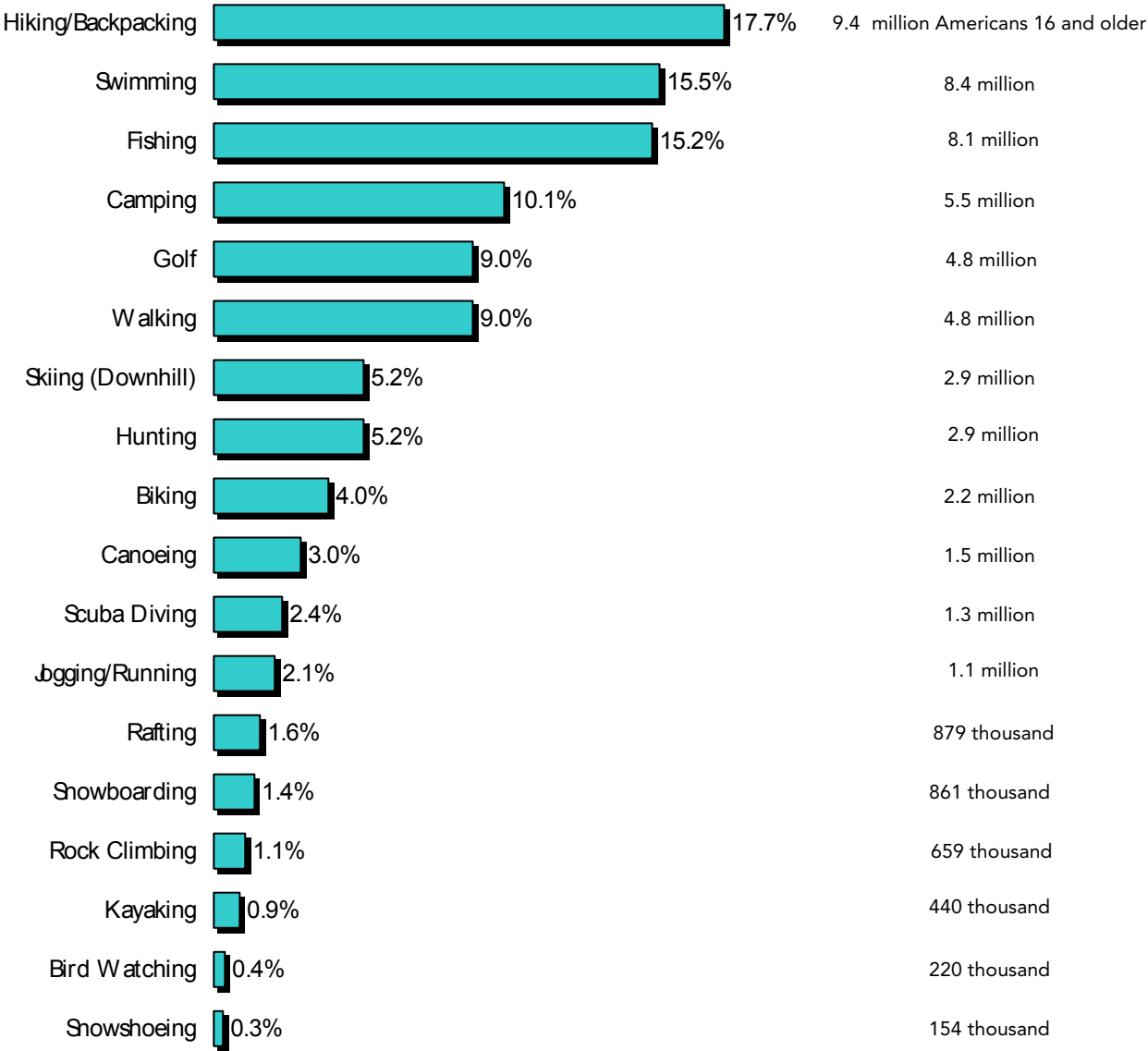
25% = Significant difference from 2001

TOOK AN ADVENTURE/OUTDOOR ACTIVITY VACATION IN 2003* – ACTIVITIES

Americans who took adventure/outdoor oriented vacations in 2003 participated in a wide variety of activities.

The three most popular activities that traveling Americans planned their vacations around in 2003 include hiking/backpacking (9.4 million Americans 16 and older), swimming (8.4 million) and fishing (8.1 million).

Trips that included camping (5.5 million), golf (4.8 million) and walking (4.8 million) activity also inspired vacations in 2003 among Americans 16 and older.



* Percentages based to Americans who traveled on an adventure/outdoor activity (25%) vacation.

OUTDOOR RECREATION PARTICIPATION STUDY
METHODOLOGY DETAIL

METHODOLOGY DETAIL

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

Specifics of the data collection efforts are as follows:

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

Each quarter, telephone interviews are conducted using scientific sampling and random digit dial methodology. A disproportionate stratified random sample by census region is used for the study. Calls are made at random until a representative quota for each region is reached, and a total of 1,000 interviews are conducted. Only Americans age 16 and older are interviewed. Interviewing for the LeisureTRAK® is spread over 28 consecutive days in each quarter.

The overall 2003 Participant/Enthusiasts results are projected to the American population, age 16 and over, with a margin of error of +/- 1.6% at the 95% level of confidence. This is a constant because all of the Participant and Enthusiast levels are calculated using the information provided by all 4,000 respondents.

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

U.S. POPULATION ESTIMATES & IMPACT ON ANALYSIS

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

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

It is important to note that the 2003 Census estimate reflects a 1.1% increase in the total U.S. population 16 and over compared to 2002. This increase has an impact on the projected populations of Outdoor Industry Association activities. When comparing the estimated activity populations across different years, consideration must be given to the fact that the 2003 projection is based on a total U.S. population that is larger by millions of people than in previous years. The percentage of respondents who indicate participating in an activity may have declined slightly from the previous year, but may project to a larger activity population – simply because of the increase in U.S. population 16 and older during that time. **For that reason, the determination of growth or decline in each activity has been focused on the incidence of people participating in activities, rather than changes in the projected population sizes.**

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

No detailed **Participant** information available for:

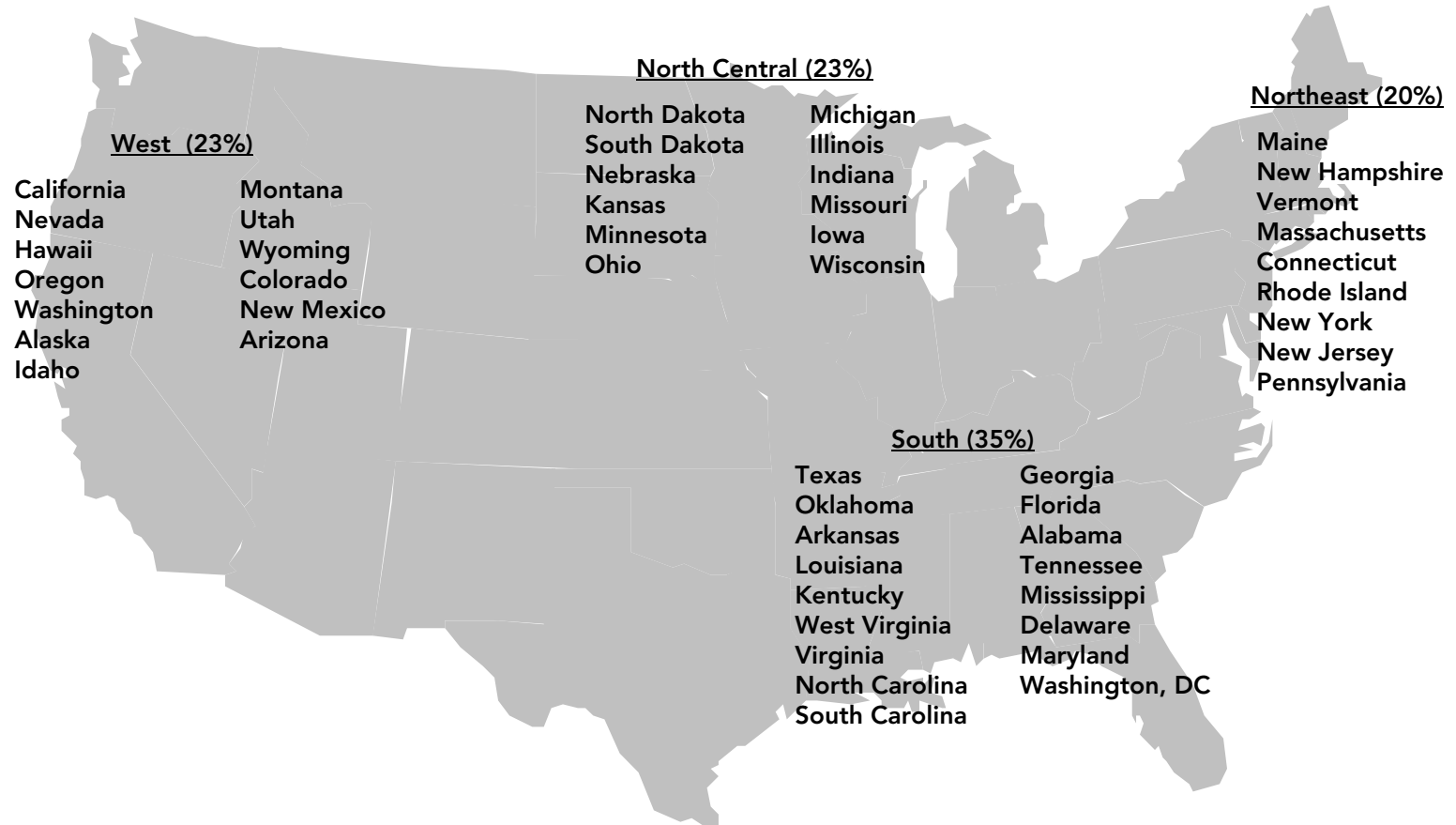
Ice Climbing

No detailed **Enthusiast** information available for:

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

REGIONS DEFINED

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



DEFINITION CHANGES IN THE PARTICIPATION STUDY

Telemark Skiing & Cross-Country/Nordic Skiing

Year 2003

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

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

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

Year 2001

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

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

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

DEFINITION CHANGES IN THE PARTICIPATION STUDY

Camping, Backpacking and Car Camping Explained

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

ADDITIONAL RESEARCH

This document is the full report of *The 6th Edition, 2004, Participation Study*. Thanks to support from Outdoor Industry Foundation (OIF), this report is provided free to all OIA members as a member benefit. To receive your copy of the full 2004 Participation Study, please contact Julie Meyers jmeyers@outdoorindustry.org or 303.444.3353x205.

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. As part of OIF's outreach program, research is constantly being run to identify potential markets, recreation areas and to understand the outdoor participant. The following reports can be found online at www.outdoorindustry.org.

- Exploring the Active Lifestyle, Executive Summary,* 2004
- ROI: A Targeted Look at Participants with Potential, 2004 – Coming Soon!
- Top Line Retail Sales Report 2004 – Coming Soon!
- State of the Industry Report, 2002
- Outdoor Recreation Participation and Spending Study, 2002

*Exploring the Active Lifestyle is an OIF consumer outreach report. The full 180 page report goes into detail on specific activity profiles. Companies that contribute \$5,000 and above to Outdoor Industry Foundation receive the full report. For further information or to make a donation, please contact Kandice King at 303.444.3353 ext. 204 or kking@outdoorindustry.org