



# **OUTDOOR RECREATION PARTICIPATION STUDY™**

**EIGHTH EDITION, FOR YEAR 2005**

**Trend Analysis for the United States  
Published June 2006**

**Outdoor Industry Foundation  
4909 Pearl East Circle, Ste 200  
Boulder, COLORADO 80301  
303.444.3353**

**[www.outdoorindustryfoundation.org](http://www.outdoorindustryfoundation.org)**



Outdoor Industry Foundation (OIF) is a non-profit foundation established by Outdoor Industry Association. The mission of OIF is to encourage active outdoor recreation for all Americans. OIF's charter is to increase participation in outdoor recreation and to encourage and support healthier active lifestyles. Through education, partnerships, programs and advocacy, OIF is working to make active outdoor recreation the number one leisure activity in America. We invite you to join us on this important mission. Visit our website at [www.outdoorindustryfoundation.org](http://www.outdoorindustryfoundation.org) or contact us at:

Outdoor Industry Foundation  
4909 Pearl East Circle, Suite 200  
Boulder, CO 80301  
303/444-3353  
Research@outdoorindustry.org



**THE LEISURE TRENDS GROUP** conducted the research on behalf of **Outdoor Industry Foundation**. The **LTG** name or the name of any of its affiliated companies, including **Recreation Research** or **Spring Research**, may not be used in any paid advertising in support of a product or service, or point of view without review and approval by The Leisure Trends Group.  
Contact the Leisure Trends Group at 303 786-7900 X107.

**A Note About Copyright:** If data from this report is reproduced, Outdoor Industry Foundation's **Outdoor Recreation Participation Study™** must be referenced as the source. Outdoor Industry Foundation and/or Leisure Trends Group must review and approve all press releases and other documents prepared to assist in the public dissemination of all survey and research data. Outdoor Industry Foundation and/or Leisure Trends Group will complete its review within 48 hours of receipt, and usually within less than 24 hours.

# TABLE OF CONTENTS

SECTION	PAGE
<b>Introduction</b>	<b>4</b>
<b>Key Findings</b>	<b>10</b>
<b>Detailed Findings</b>	<b>22</b>
All Activities – An Overall Perspective	23
Young Adult Participation: Ages 16-24	31
Female Participation	36
Participation by Ethnicity	41
Non-Participants	46
<b>Activities Tracked Since 1998</b>	<b>50</b>
Backpacking	51
Bicycling – Paved Road, Single Track, Dirt Road	58
Camping – Car, Away from Car	76
Canoeing	96
Cross-Country/Nordic Skiing	103
Hiking	110
Rafting	117
Snowshoeing	124
Telemark Skiing	131
Trail Running	138
<b>Activities Added Since 1998</b>	<b>145</b>
Bird Watching	146
Climbing – Natural Rock, Artificial Wall, Ice	153
Fishing – Fly-Fishing, Fishing (Non-Fly)	172
Kayaking – Recreation/Sit-on-Top, Touring/Sea, Whitewater	190
<b>Activities Not Included in Outdoor Participation Trend Analysis</b>	<b>209</b>
Hunting	210
Motorized Off-Road Activities	216
<b>Competitive Participation in Outdoor Activities</b>	<b>223</b>
<b>Adventure/Sports/Outdoor Activity Travel</b>	<b>228</b>
<b>Methodology</b>	<b>233</b>

OUTDOOR RECREATION PARTICIPATION STUDY  
**INTRODUCTION**

# OBJECTIVES OF STUDY

The objectives of the annual Outdoor Industry Foundation Outdoor Recreation Participation Study are to:

1. Annually track nationwide participation levels for Americans 16 and older in active outdoor activities.
2. Give insight into Americans' behavior as outdoor recreationists.
3. Provide independent and projectable quantitative research to help the outdoor industry and its constituents understand trends in participation levels, demographics and levels of commitment to outdoor activities over time.

# METHODOLOGY OF THE PARTICIPATION STUDY

Outdoor Industry Foundation (OIF) presents the Outdoor Recreation Participation Study™. This is the 8th edition of this annual report, produced for OIF by The Leisure Trends Group, tracking nationwide participation levels for Americans ages 16 and older in 22 outdoor activities.

## A Trend Report

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

## Methodology Summary

A more detailed methodology section can be found at the close of the report. In summary, data for this study were collected as part of the LeisureTRAK®, an on-going study of Americans' leisure time behavior and attitudes. For comparative purposes, the quarterly data collected for this report have been aggregated on an annual basis for each of the years shown, 1998 through 2005. During 2005, 4,000 telephone interviews were conducted using scientific sampling and random digit dial methodology. The overall 2005 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 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.

# ACTIVITIES: 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. All activities except motorized off-road activities and hunting are included in participation numbers.

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 - Dirt Road	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
Fishing (Non-Fly)	2004	Any type of fishing OTHER than fly-fishing
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/Sit-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
Snowshoeing	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
Motorized Off-Road Activities	2003	Activities that might include ATV riding, dirt biking or four wheeling
Hunting	2005	Hunting with a firearm or bow

## Participant Definition

The Participant market segment represents all Americans 16 years of age and older who, based on our description of an outdoor activity, believe they participated in that activity at least one time during the past year.

## Significance Testing

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 population changing? Since it is not practical (or possible) to speak to all 224+ 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.

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. Within the report results in 2005 have been compared to 2003 results at the 95% confidence level – a stringent research industry standard. This means that if the study was conducted 100 times in year 2005, the same conclusion would be arrived at 95 out of those 100 times – for example, that kayaking participation increased in 2005 compared to 2003.

Therefore, increases and decreases in Participant 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 2005 results that are significantly different from results reported in 2003 are noted with a . For continuity reasons, the  has been noted on the year 2005 results. The reader needs only to visually compare the year 2003 and 2005 results to determine if the current results are significantly higher or significantly lower than in 2003.



## TREND RESULTS: ROLLING AVERAGE

The primary purpose of the Participation Study is to identify Americans' participation in active outdoor recreation on an annual basis – a specific point in time. The results of the research rightly fluctuate from year to year. Participant 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 2005 Participation Study features a perspective (first introduced in the Year 2003 report) 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 trends have been reported this year both overall and for each activity, providing a perspective that reveals the cumulative impact of Americans' involvement in select outdoor activities over the past several years. This trends are presented in the graphs with a dotted line.

**For a full overview of the study methodology, please see page 236.**

OUTDOOR RECREATION PARTICIPATION STUDY

# KEY FINDINGS

# KEY FINDINGS

## Participation in Select Outdoor Activities Remains Stable with almost Three-Quarters of Americans (Ages 16 and Older) Participating in 2005

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

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

\*Based on participation in 22 select outdoor activities. See page 7 for a list and definition of each outdoor activity.

# KEY FINDINGS

## Total Outings Declined 11% in 2005

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

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

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

# KEY FINDINGS

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

- ❖ Overnight backpacking (22.5% decline) is the one activity that declined dramatically in participation over an eight year period.
- ❖ Snowshoeing and trail running increased significantly over the eight year period (83% and 22% growth respectively).
  
- ✓ *Activities which meet the following characteristics will have broader appeal.*
  - ✓ *Easy access*
  - ✓ *Easy to learn*
  - ✓ *Done in a day*
  - ✓ *Less specialized technical gear required*
  
- ✓ *Growth in outdoor activities comes from two sources: increases in participation (new participants and cross-over participants) and increases in total outings. To increase participation, "new" twists on "old" activities are needed that make the activity more appealing and meet the above characteristics.*

# KEY FINDINGS

## One Time Trial does NOT Equal Conversion

- ❖ 18% of Americans 16 and older only took one to three total outings in 2005.
  - ❖ Fly-fishing peaked in 2004 but then declined 19.9% from 2004 to 2005.
  - ❖ Telemark Skiing peaked in 2000, then declined in 2001 and stabilized after that time period.
  - ❖ Except for bicycling, bird watching and trail running, the majority of individuals participate only one or two times each year in each activity.
- 
- ✓ *The old adage is that current customers are easier to keep than it is to gain new customers. This holds true in participation. Finding triggers that encourage repeat participation in each activity will be important to grow the market. Repeat participants are more likely to purchase products and encourage friends and family to participate.*
  
  - ✓ *Some essential questions to consider:*
    - ✓ *How easy is it to become an “expert” in the activity?*
    - ✓ *What is being done to help the learning curve?*
    - ✓ *How easy is it to get to the destination?*
    - ✓ *How much time must be spent on the activity?*
    - ✓ *What can be done to encourage repeat participation?*
    - ✓ *What can be done to promote the activity?*
    - ✓ *How can we lower the equipment cost to engage in activities?*
  
  - ✓ *It is necessary to have continual contact with individuals who participate in “trials” to encourage repeat participation.*

# KEY FINDINGS

## Participation and Frequency of Participation must be Examined within the Context of the World at Large

### ✓ *Why are bike outings declining?*

- ❖ Total outings declined significantly for bicycling from 2004 to 2005. In 2004, biking participants took an average of 45 outings compared to 36 outings in 2005. In 2001 when biking was at its height 24% of participants took over 50 outings a year compared to 16% in 2005.

✓ *Weather can dramatically influence participation and frequency. In 2005, there were a number of notable weather events in the U.S. – hurricanes in the South Central region, bitter cold winter in the Northeast, late snow in the Midwest, no snow in the Pacific Northwest, and good snow in the southern Rockies.*

- ❖ Sit-on-top kayaking increased 34.4% from 2003 and 22.4% from 2004. Snowy winters mean available water for kayaking.
- ❖ Fly-fishing declined 19.9% in 2005. Too much snow run off is bad for fly-fishing as is a bad hurricane season.
- ❖ Decline in bicycling total outings can be affected by a strong hurricane season and bitter cold.

# KEY FINDINGS

## Participation and Frequency of Participation must be Examined within the Context of the World at Large (continued)

- ✓ *Changes in the economy are related to participation and frequency.*
  - ❖ A healthy economy allows people to try new activities.
  - ❖ An exceptional economy as seen with the Internet bubble in the late 90's actually has a detrimental affect as more time is spent at work and less time is spent at play. The lowest participation levels are in 1998 and 1999.
  - ❖ In a non-peak economy outings tend to increase as people will focus on their core activities and will participate more frequently in those activities. Total outings peaked in 2001 (9 billion) and 2002 (8.6 billion).
  - ❖ During a poor economy as experienced in 2003 total outings declined. Individuals had less disposable income to purchase equipment for a new activity or upgrade equipment from current activities. In addition, there was less income for recreational travel. In these less prosperous times people tend to focus on familiar activities and close to home recreation.



# KEY FINDINGS

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

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

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

# KEY FINDINGS

## The 2005 Participant

- ❖ Based on the core 13 activities first measured in 1998, total outings have declined in 2005 but the total number of activities one individual participates in has increased.
  - ❖ Total outings declined slightly (5%) in 2005 from 1998 (6.2 billion outings in 1998 compared to 5.9 billion outings in 2005). This is due in large part to the decline in bicycle outings (25% decline) in 2005 (4.1 billion outings in 1998 compared to 3.1 billion outings in 2005).
  - ❖ The total number of activities in which Americans 16 years of age and older participate has increased from an average of 2.8 activities in 1998 to 3.6 activities in 2005.
- ✓ *Although Americans who participate in the core 13 activities declined their overall outings in bicycling, they have added more activities to their outdoor repertoire.*
- ✓ *To increase the percentage of Americans who participate in outdoor activities, the industry will have to define new activities that capture the interest of the non-participant group.*

# KEY FINDINGS

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

- ❖ Hispanic Participants: Male (66%), 16 to 24 year olds (42%). Hispanic Participants took the most total outings (average 53.7) in 2005.
- ❖ Black/African American Participants: Male (60%), 16 to 24 year olds (40%). Most likely to participate in only one outdoor activity.
- ❖ Caucasian/White Participants: Male (54%) 16 to 24 year olds (20%).
- ❖ Participation rates differ in the top five outdoor activities:

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

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

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

# KEY FINDINGS

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

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

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

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

# KEY FINDINGS

## Participation among 16 to 24 Year Olds is High, but Watch out for Other Activities

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

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

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

OUTDOOR RECREATION PARTICIPATION STUDY  
**DETAILED FINDINGS**

OUTDOOR RECREATION PARTICIPATION STUDY  
**ALL ACTIVITIES – AN OVERALL PERSPECTIVE**

ALL ACTIVITIES

# ALL ACTIVITIES: PARTICIPANT LEVELS AND TRENDS

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

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

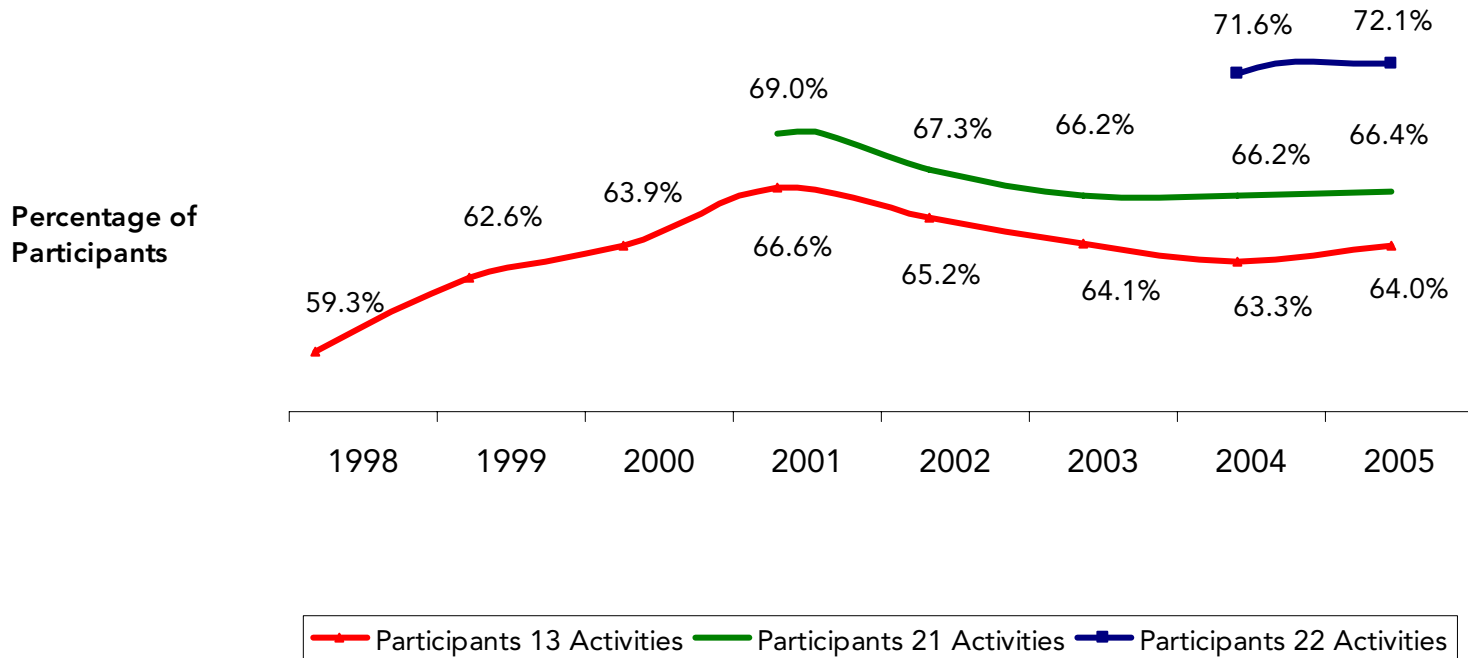
\*\* Represents a large percent growth or decline (greater than 20%) but is not significantly different from 2005 at the 95% confidence level

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



# ALL ACTIVITIES: PARTICIPATION

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



# ALL ACTIVITIES: TOTAL OUTINGS

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

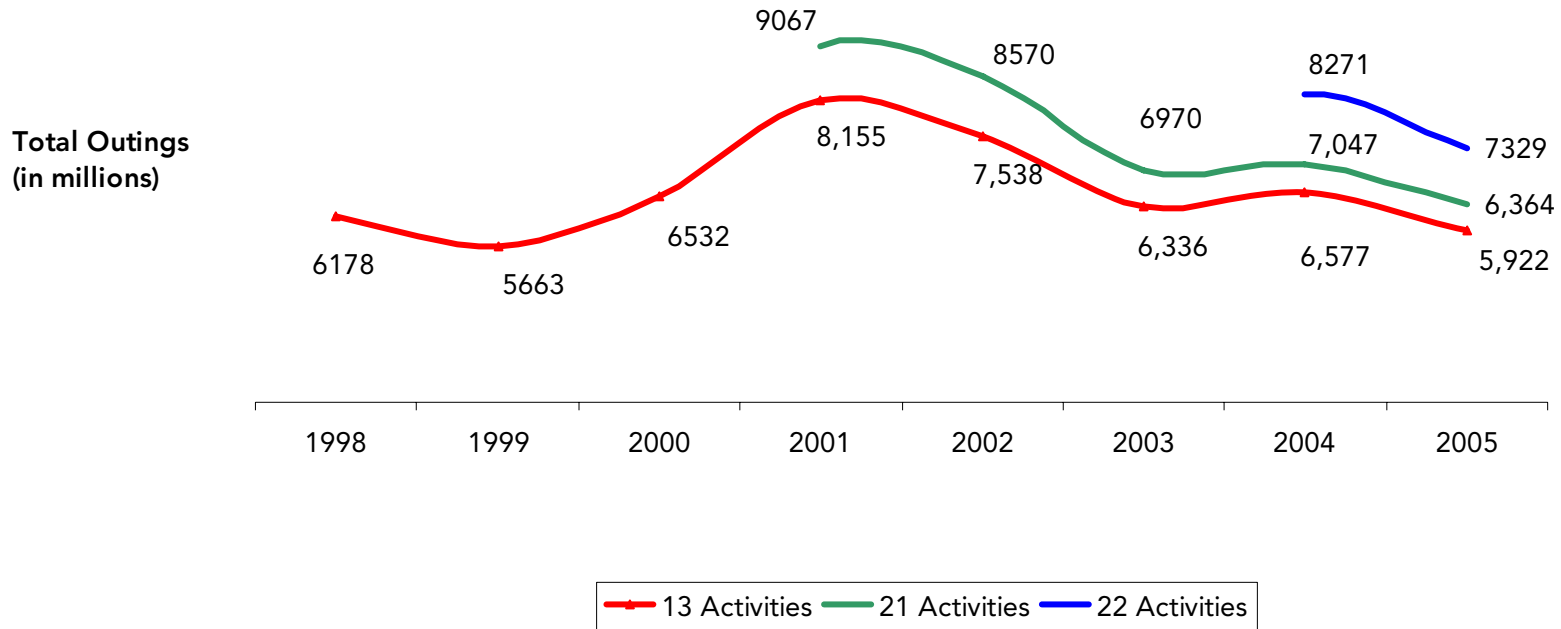
\*Data not shown in individual section due to small sample size.

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

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

# ALL ACTIVITIES: TOTAL OUTINGS\* TRENDS

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




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

# ALL ACTIVITIES: MULTI-PARTICIPATION

During 2005, the majority (82.3%) of Participants participated in between one and five separate outdoor activities. Participants ages 16 and older participated in slightly more than three different activities on average in 2005. During 2005, Participants took on average 45 different outings – less than the average number of outings taken in 2004. The large decline in bicycling and fishing outings accounts for this large decline in total outings

When examining just the 13 core activities from 1998, that group of Americans participated on average in 3.6 activities in 2005 and only 2.8 activities in 1998. Some activities like bird watching and fishing that were added since 1998 do not have as high of crossover with other outdoor activities. Therefore, participation incidence went up by adding more activities; however, mean number of activities participated in per participant decreased based on the 22 activities.

Number of Human Powered Activities Participated In During 2004 and 2005	2004	2005
1 activity only	26.0%	26.6%
2 activities	19.5%	19.7%
3	15.3%	16.3%
4	13.7%	11.5%
5	9.0%	8.2%
6	5.4%	6.4%
7	3.5%	4.7%
8	3.5%	2.7%
9	1.5%	1.5%
10	1.1%	1.2%
11	0.7%	0.5%
12	0.3%	0.3%
13	0.2%	0.0%
14	0.0%	0.3%
15	0.1%	0.0%
16	0.0%	0.0%
17	0.0%	0.0%
18	0.0%	0.0%
19	0.0%	0.0%
20	0.0%	0.0%
21	0.0%	0.0%
22 activities	0.0%	0.0%
<b>Mean # of Activities Participated In</b>	<b>3.4</b>	<b>3.3</b>
<b>Mean # of Outings</b>	<b>50.7</b>	<b>44.7</b>

 = Significant difference from 2004

# ALL ACTIVITIES: DEMOGRAPHIC PROFILE TRENDS

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

## Demographic Profile

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

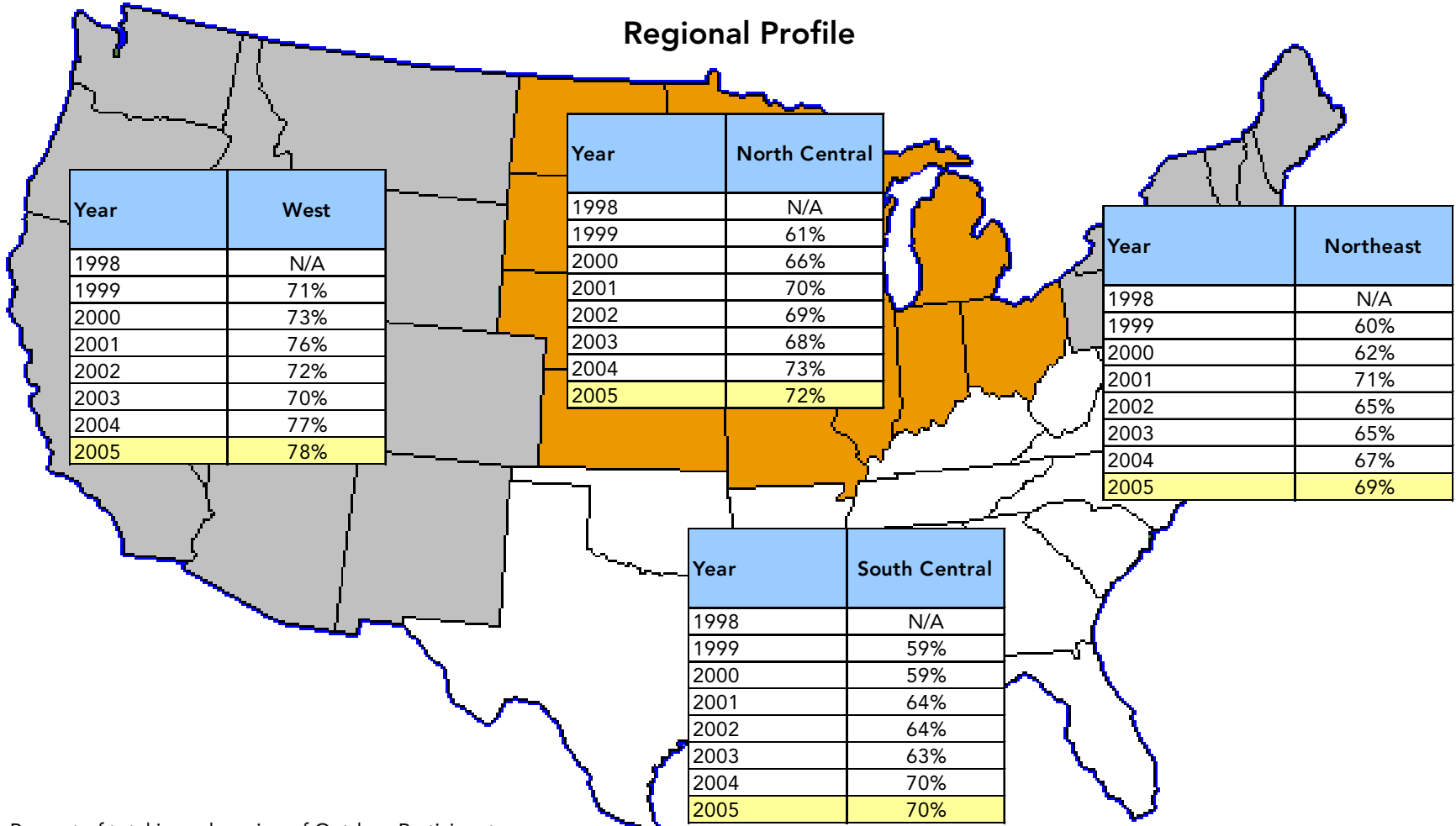
\*Ethnicity: Will not add to 100%, see page 239 for details.   = Significant difference from 2003.

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

# ALL ACTIVITIES: WHERE PARTICIPANTS LIVE\*

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

## Regional Profile



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

OUTDOOR RECREATION PARTICIPATION STUDY  
**YOUNG ADULT PARTICIPATION:  
AGES 16-24**

# 16 TO 24 YEAR OLDS: PARTICIPANT LEVELS AND TRENDS

Activity	American's 16 To 24 Years of Age					
	Incidence of Participation in 2005	Participant Population (Millions)	Total Number of Outings (Millions)*	Participation Incidence % Change - 2005 vs.1998	Participation Incidence % Change - 2005 vs.2003	Participation Incidence % Change - 2005 vs.2004
<b>Human Powered Activities - Any Type</b>	<b>86.5%</b>	<b>35.5</b>	<b>2169</b>	<b>N/A</b>	<b>N/A</b>	<b>2.1%</b>
Backpacking	11.7%	4.8	33	-32.3%	-4.4%	-13.8%
<b>Bicycling - Any Type</b>	<b>51.5%</b>	<b>21.1</b>	<b>981</b>	<b>-12.8%</b>	<b>1.1%</b>	<b>0.2%</b>
Bicycling - Paved Road	47.1%	19.3	657	-15.8%	4.5%	-1.7%
<b>Bicycling - Mountain Biking</b>	<b>37.7%</b>	<b>15.4</b>	<b>324</b>	<b>-20.7%</b>	<b>-0.6%</b>	<b>-2.6%</b>
Bicycling - Single Track Dirt	31.3%	12.8	179	-22.2%	1.3%	-4.4%
Bicycling - Wide Track Dirt	29.4%	12.1	145	-27.5%	-1.4%	-5.6%
Bird Watching	4.4%	1.8	7	N/A	-6.5%	33.0% **
<b>Camping - Any Type</b>	<b>45.4%</b>	<b>18.6</b>	<b>83</b>	<b>-2.6%</b>	<b>8.6%</b>	<b>1.0%</b>
Car Camping	29.1%	11.9	48	-1.3%	5.8%	2.7%
Camping (Away from Car)	17.1%	7.0	35	0.6%	17.4%	2.4%
<b>Climbing with Rope/Harness - Any Type</b>	<b>10.8%</b>	<b>4.4</b>	<b>24</b>	<b>N/A</b>	<b>22.7% **</b>	<b>9.1%</b>
Climbing - Natural Rock	5.7%	2.4	7	-14.7%	34.9% **	-10.9%
Climbing - Artificial Wall	8.3%	3.4	17	N/A	6.4%	14.4%
Climbing - Ice	0.5%	0.2	0	N/A	-31.0% **	-59.7% **
Cross-Country/Nordic Skiing	7.6%	3.1	12	3.6%	72.6%	61.1%
<b>Fishing - Any Type</b>	<b>43.2%</b>	<b>17.7</b>	<b>209</b>	<b>N/A</b>	<b>N/A</b>	<b>-4.2%</b>
Fly Fishing	9.3%	3.8	57	N/A	34.6% **	-11.8%
Fishing (Non-Fly)	41.2%	16.9	152	N/A	N/A	-5.0%
Hiking	39.7%	16.3	147	-1.1%	10.3%	-1.4%
<b>Paddlesports - Any Type</b>	<b>20.9%</b>	<b>8.6</b>	<b>48</b>	<b>N/A</b>	<b>1.9%</b>	<b>1.7%</b>
Canoeing	11.5%	4.7	19	-17.7%	-18.5%	-19.7%
Rafting	8.6%	3.5	11	-13.6%	10.7%	3.4%
<b>Kayaking - Any Type</b>	<b>8.1%</b>	<b>3.3</b>	<b>18</b>	<b>N/A</b>	<b>12.7%</b>	<b>7.4%</b>
<b>Kayaking (Non-Whitewater)</b>	<b>7.1%</b>	<b>2.9</b>	<b>17</b>	<b>N/A</b>	<b>7.4%</b>	<b>0.3%</b>
Kayaking - Recreation/Sit-on-Top	5.1%	2.1	12	N/A	27.8% **	-7.9%
Kayaking - Touring/Sea	3.5%	1.5	4	N/A	-3.4%	-9.8%
Kayaking - Whitewater	2.0%	0.8	2	N/A	53.4% **	-7.9%
Snowshoeing	3.9%	1.6	6	67.7%	26.0% **	54.4% **
Telemark Skiing	3.0%	1.2	11	293.8%	-26.0% **	-12.1% **
Trail Running	42.2%	17.3	606	41.1%	21.9%	14.8% **

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

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

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



# 16 TO 24 YEAR OLDS: MULTI-PARTICIPATION

During 2005, the majority (71.4%) of Participants 16 to 24 years of age participated in between one and five separate outdoor activities. Over one quarter (26.3%) participated in six to ten activities. The mean number of outdoor outings for Participants 16 to 24 years of age was 60.3 in 2005.

Number of Human Powered Activities Participated In 16 to 24 Year Olds	2004	2005
1 activity only	16.7%	15.4%
2 activities	16.7%	17.2%
3	14.3%	16.0%
4	14.7%	11.1%
5	10.0%	11.7%
6	7.4%	8.6%
7	4.6%	8.8%
8	6.7%	4.7%
9	3.0%	2.1%
10	2.0%	2.1%
11	1.7%	0.8%
12	0.6%	0.6%
13	0.6%	0.0%
14	0.2%	0.8%
15	0.4%	0.0%
16	0.0%	0.0%
17	0.0%	0.0%
18	0.0%	0.0%
19	0.2%	0.0%
20	0.0%	0.0%
21	0.2%	0.0%
22 activities	0.0%	0.0%
<b>Mean # of Activities Participated In</b>	<b>4.3</b>	<b>4.2</b>
<b>Mean # of Outings</b>	<b>68.7</b>	<b>60.3</b>

= Significant difference from 2004

# 16 TO 24 YEAR OLDS: DEMOGRAPHIC PROFILE TRENDS

Year 2005 overall young adult Participants are more likely to be male and unmarried. The young adult participation population is ethnically diverse, with one in five of Hispanic origin and 12% are African-American. One-third of young adult Participants live in the South Central and Western regions. Participation in the West has been increasing since 2003.

## Demographic Profile

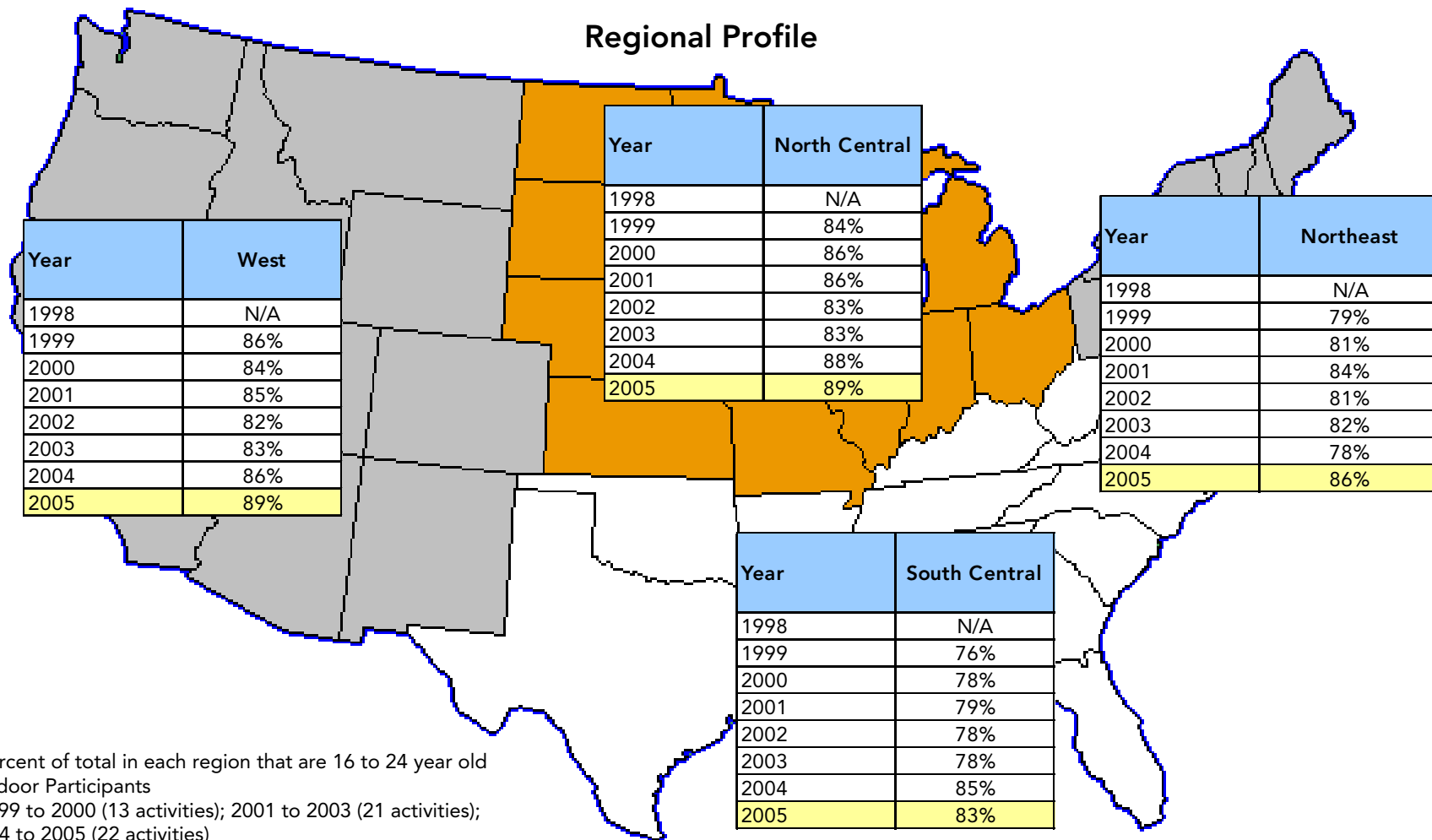
Participants	1998 (13 Activities)	1999 (13 Activities)	2000 (13 Activities)	2001 (21 Activities)	2002 (21 Activities)	2003 (21 Activities)	2004 (22 Activities)	2005 (22 Activities)
<b>Gender</b>								
Male	57%	56%	56%	57%	57%	60%	61%	64%
Female	43%	44%	44%	43%	43%	40%	39%	36%
<b>Marital Status</b>								
Married	12%	7%	10%	9%	11%	11%	10%	9%
Unmarried	88%	92%	90%	91%	88%	89%	90%	90%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	67%	64%	62%
African-American	N/A	N/A	N/A	N/A	N/A	11%	12%	12%
Hispanic	N/A	N/A	N/A	N/A	N/A	17%	21%	21%
Asian	N/A	N/A	N/A	N/A	N/A	3%	3%	3%
Other	N/A	N/A	N/A	N/A	N/A	7%	8%	11%
<b>Household Income</b>								
<\$40k	N/A	60%	61%	57%	53%	57%	56%	49%
\$40k - \$79k	N/A	33%	32%	31%	31%	31%	30%	33%
\$80k+	N/A	7%	6%	12%	16%	12%	14%	18%
<b>Region</b>								
Northeast	20%	15%	14%	17%	18%	17%	14%	17%
South Central	34%	36%	32%	35%	34%	36%	38%	33%
North Central	23%	22%	23%	19%	23%	22%	20%	18%
West	24%	27%	31%	28%	25%	26%	28%	32%

\*Ethnicity: Will not add to 100%, see page 239 for details.

  = Significant difference from 2003  
 Note: 2003 Does not include Fishing (Non-Fly)

# 16 TO 24 YEAR OLDS: WHERE PARTICIPANTS LIVE\*

A large percentage of young adults within each region are participants. Close to nine in 10 participants aged 16 to 24 living in the West and North Central regions participate in a outdoor activity.



- Percent of total in each region that are 16 to 24 year old outdoor Participants
- 1999 to 2000 (13 activities); 2001 to 2003 (21 activities); 2004 to 2005 (22 activities)
- Not all 13 activities were asked for every fielding in 1998

OUTDOOR RECREATION PARTICIPATION STUDY  
**FEMALE PARTICIPATION**

FEMALES

# FEMALES: PARTICIPANT LEVELS AND TRENDS

Activity	Female American's 16 Years of Age or Older					
	Incidence of Participation in 2005	Participant Population (Millions)	Total Number of Outings (Millions)*	Participation Incidence % Change 2005 vs.1998	Participation Incidence % Change - 2005 vs.2003	Participation Incidence % Change - 2005 vs.2004
<b>Human Powered Activities - Any Type</b>	<b>64.2%</b>	<b>74.5</b>	<b>2115</b>	<b>N/A</b>	<b>N/A</b>	<b>0.8%</b>
Backpacking	3.1%	3.6	11	-21.4% **	-15.9%	2.1%
<b>Bicycling - Any Type</b>	<b>32.3%</b>	<b>37.5</b>	<b>821</b>	<b>-12.3%</b>	<b>-6.7%</b>	<b>-3.8%</b>
Bicycling - Paved Road	29.9%	34.7	624	-13.1%	-4.7%	-3.6%
<b>Bicycling (Mountain Biking)</b>	<b>16.5%</b>	<b>19.1</b>	<b>196</b>	<b>-23.4%</b>	<b>-8.5%</b>	<b>-5.6%</b>
Bicycling - Single Track Dirt	12.4%	14.3	100	-18.7%	-9.4%	0.2%
Bicycling - Wide Track Dirt	11.8%	13.7	96	-27.1%	-14.0%	-9.9%
Bird Watching	6.9%	8.0	113	N/A	5.6%	-2.0%
<b>Camping - Any Type</b>	<b>23.5%</b>	<b>27.2</b>	<b>100</b>	<b>-12.1%</b>	<b>-12.7%</b>	<b>-3.3%</b>
Car Camping	19.4%	22.5	90	-11.3%	-13.4%	-2.9%
Camping (Away from Car)	4.5%	5.2	10	1.0%	2.2%	9.0%
<b>Climbing with Rope/Harness - Any Type</b>	<b>2.2%</b>	<b>2.6</b>	<b>15</b>	<b>N/A</b>	<b>-11.0%</b>	<b>11.5%</b>
Climbing - Natural Rock	0.8%	0.9	3	-52.2%	-24.1% **	-22.3% **
Climbing - Artificial Wall	2.1%	2.4	12	N/A	3.2%	19.5%
Climbing - Ice	0.1%	0.1	0	N/A	-60.9% **	-58.4% **
Cross-Country/Nordic Skiing	4.0%	4.6	23	0.0%	6.4%	-3.5%
<b>Fishing - Any Type</b>	<b>23.9%</b>	<b>27.7</b>	<b>191</b>	<b>N/A</b>	<b>N/A</b>	<b>-8.8%</b>
Fly Fishing	3.2%	3.7	30	N/A	4.4%	-41.6%
Fishing (Non-Fly)	23.1%	26.8	161	N/A	N/A	-6.1%
Hiking	30.6%	35.5	390	4.4%	7.3%	-0.1%
<b>Paddlesports - Any Type</b>	<b>12.4%</b>	<b>14.4</b>	<b>56</b>	<b>8.4%</b>	<b>3.5%</b>	<b>9.8%</b>
Canoeing	7.2%	8.3	25	3.7%	-8.7%	-8.2%
Rafting	3.5%	4.1	8	-7.2%	-8.8%	15.2%
<b>Kayaking - Any Type</b>	<b>5.1%</b>	<b>5.9</b>	<b>23</b>	<b>N/A</b>	<b>42.9%</b>	<b>39.0%</b> **
<b>Kayaking (Non-Whitewater)</b>	<b>4.7%</b>	<b>5.4</b>	<b>21</b>	<b>N/A</b>	<b>43.6%</b>	<b>34.6%</b> **
Kayaking - Recreation/Sit-on-Top	3.7%	4.3	17	N/A	71.4%	47.6%
Kayaking - Touring/Sea	1.8%	2.1	4	N/A	-19.9%	-21.8% **
Kayaking - Whitewater	0.6%	0.7	1	N/A	-2.9%	4.3%
Snowshoeing	2.2%	2.6	13	164.4%	6.6%	72.4%
Telemark Skiing	1.4%	1.6	6	88.6%	-22.4% **	37.0%
Trail Running	12.5%	14.5	377	5.1%	-2.5%	-8.5%

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

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

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

## FEMALES: MULTI-PARTICIPATION

During 2005, the majority (88.3%) of female Participants participated in between one and five separate outdoor activities. On average, female participants took 28 different outdoor outings in 2005—less average outings than in 2004.

Number of Human Powered Activities Participated In Females	2004	2005
1 activity only	31.1%	32.3%
2 activities	20.6%	21.5%
3	15.2%	16.4%
4	12.9%	11.4%
5	8.5%	6.7%
6	4.5%	4.8%
7	2.8%	3.5%
8	1.8%	1.6%
9	1.1%	0.7%
10	0.7%	0.6%
11	0.5%	0.3%
12	0.2%	0.1%
13	0.1%	0.0%
14	0.0%	0.1%
15	0.0%	0.0%
16	0.0%	0.0%
17	0.0%	0.0%
18	0.0%	0.0%
19	0.0%	0.0%
20	0.0%	0.0%
21	0.0%	0.0%
22 activities	0.0%	0.0%
<b>Mean # of Activities Participated In</b>	<b>3.0</b>	<b>2.9</b>
<b>Mean # of Outings</b>	<b>38.3</b>	<b>28.4</b>

= Significant difference from 2004.

# FEMALES: DEMOGRAPHIC PROFILE TRENDS

Females of all ages participated in outdoor activities during 2005, but the population skews older (34% are 45 years of age or older). Fewer younger females (16 to 24 years of age) participated in outdoor activities in 2005 than did in 2003.

Year 2005 female Participant population is comprised of individuals who are predominantly Caucasian (82%).

## Demographic Profile

Participants	1998 (13 Activities)	1999 (13 Activities)	2000 (13 Activities)	2001 (21 Activities)	2002 (21 Activities)	2003 (21 Activities)	2004 (22 Activities)	2005 (22 Activities)
<b>Age</b>								
16 to 24	19%	19%	24%	25%	25%	26%	23%	21%
25 to 34	21%	21%	20%	22%	21%	20%	24%	23%
35 to 44	25%	27%	24%	21%	19%	21%	20%	23%
45+	35%	34%	32%	31%	35%	34%	33%	34%
<b>Marital Status</b>								
Married	55%	57%	53%	48%	54%	52%	53%	57%
Unmarried	45%	42%	47%	52%	46%	48%	47%	43%
<b>Ethnicity</b>								
Caucasian	NA	NA	NA	NA	NA	80%	81%	82%
African-American	NA	NA	NA	NA	NA	7%	8%	7%
Hispanic	NA	NA	NA	NA	NA	10%	9%	8%
Asian	NA	NA	NA	NA	NA	2%	1%	2%
Other	NA	NA	NA	NA	NA	4%	5%	5%
<b>Children &lt;18</b>								
Yes	48%	52%	52%	46%	47%	52%	52%	51%
<b>Household Income</b>								
<\$40k	NA	46%	44%	43%	41%	41%	41%	37%
\$40k - \$79k	NA	43%	46%	42%	39%	37%	37%	40%
\$80k+	NA	11%	10%	15%	20%	23%	22%	23%
<b>Region</b>								
Northeast	17%	18%	13%	19%	17%	19%	18%	21%
South Central	35%	34%	35%	32%	30%	33%	34%	33%
North Central	26%	23%	24%	23%	28%	26%	27%	24%
West	22%	26%	28%	26%	25%	22%	21%	22%

\*Ethnicity: Will not add to 100%, see page 239 for details.



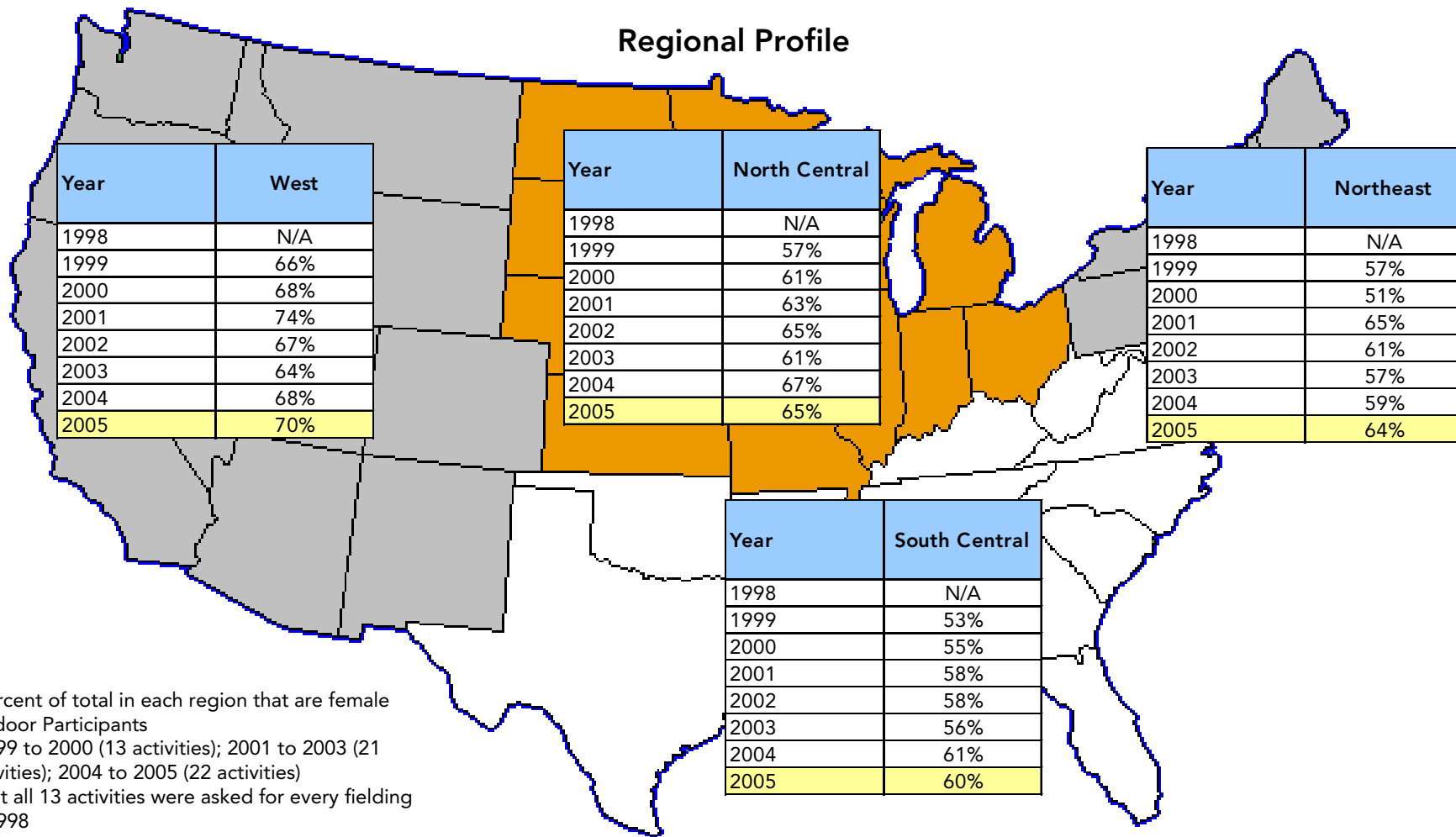
= Significant difference from 2003

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

# FEMALES: WHERE PARTICIPANTS LIVE\*

The Western region has the greatest percentage of female Participants among the population. Seventy percent of female Westerners are Participants compared to 64% of the population nationally. The South Central region has the fewest number of female participants among its population (60%).

## Regional Profile



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



OUTDOOR RECREATION PARTICIPATION STUDY  
**PARTICIPATION BY ETHNICITY**

ETHNICITY

# ETHNICITY: PARTICIPANT LEVELS AND TRENDS

Activity	Participation by Ethnicity					
	White/Caucasian		Hispanic*		Black/African American	
	Incidence of Participation in 2005	Incidence % Change - 2005 vs.2004	Incidence of Participation in 2005	Incidence % Change - 2005 vs.2004	Incidence of Participation in 2005	Incidence % Change - 2005 vs.2004
<b>Human Powered Activities - Any Type</b>	<b>72.9%</b>	<b>-1.0%</b>	<b>72.2%</b>	<b>2.8%</b>	<b>59.8%</b>	<b>2.7%</b>
Backpacking	5.3%	-1.8%	6.0%	-38.9% **	7.5%	17.1%
<b>Bicycling - Any Type</b>	<b>37.7%</b>	<b>-3.3%</b>	<b>40.5%</b>	<b>-0.8%</b>	<b>32.2%</b>	<b>-10.8%</b>
Bicycling - Paved Road	34.4%	-4.3%	37.8%	1.2%	31.0%	-10.6%
<b>Bicycling - Mountain Biking</b>	<b>21.6%</b>	<b>-6.5%</b>	<b>26.3%</b>	<b>0.7%</b>	<b>18.7%</b>	<b>-10.7%</b>
Bicycling - Single Track Dirt	16.7%	-5.0%	21.6%	-6.8%	15.6%	-5.0%
Bicycling - Wide Track Dirt	16.4%	-10.6%	20.9%	6.4%	14.6%	-5.5%
Bird Watching	7.6%	6.7%	7.1%	-7.1%	4.0%	-6.5%
<b>Camping - Any Type</b>	<b>32.2%</b>	<b>0.2%</b>	<b>28.7%</b>	<b>-2.8%</b>	<b>16.1%</b>	<b>41.5%</b> **
Car Camping	25.1%	0.7%	23.5%	23.2% ***	9.6%	62.4% **
Camping (Away from Car)	7.9%	2.0%	5.2%	-48.9% ***	7.1%	39.8% **
<b>Climbing with Rope/Harness - Any Type</b>	<b>3.9%</b>	<b>11.1%</b>	<b>3.4%</b>	<b>2.6%</b>	<b>4.9%</b>	<b>199.0%</b> ***
Climbing - Natural Rock	2.1%	2.6%	1.9%	-20.4% **	1.6%	23.6% ***
Climbing - Artificial Wall	2.7%	6.6%	2.3%	1.2%	4.9%	578.2% ***
Climbing - Ice	0.4%	-20.0% **	0.0%	N/A	0.3%	-58.7% ***
Cross-Country/Nordic Skiing	4.8%	-3.4%	2.7%	-24.0% **	1.2%	-51.3% **
<b>Fishing - Any Type</b>	<b>36.2%</b>	<b>-5.4%</b>	<b>30.9%</b>	<b>-5.6%</b>	<b>23.1%</b>	<b>-14.7%</b>
Fishing (Non-Fly)	34.9%	-5.3%	29.2%	-6.4%	21.5%	-11.0%
Fly Fishing	6.7%	-21.6%	6.6%	-9.5%	5.7%	-6.4%
Hiking	37.3%	-1.6%	29.1%	1.7%	12.9%	28.3% **
<b>Paddlesports - Any Type</b>	<b>17.3%</b>	<b>8.9%</b>	<b>11.0%</b>	<b>-2.8%</b>	<b>5.0%</b>	<b>2.6%</b>
Canoeing	10.3%	-8.1%	6.3%	-11.1%	4.0%	8.0%
Rafting	5.0%	6.2%	4.3%	20.5% **	2.0%	50.1% **
<b>Kayaking - Any Type</b>	<b>6.5%</b>	<b>33.3%</b>	<b>4.4%</b>	<b>-9.1%</b>	<b>2.1%</b>	<b>111.6%</b> **
<b>Kayaking (Non-Whitewater)</b>	<b>6.2%</b>	<b>37.8%</b>	<b>4.4%</b>	<b>-9.1%</b>	<b>2.1%</b>	<b>111.6%</b> **
Kayaking - Recreation/Sit-on-Top	4.7%	34.3%	3.1%	-2.3%	1.7%	71.1% **
Kayaking - Touring/Sea	2.9%	16.9%	1.8%	-57.0% **	1.1%	74.8% **
Kayaking - Whitewater	1.1%	-1.0%	0.8%	-60.5% **	0.4%	N/A
Snowshoeing	2.5%	6.9%	2.0%	-9.2%	0.7%	-31.3% **
Telemark Skiing	1.5%	-9.4%	0.5%	-77.5%	1.5%	134.4% **
Trail Running	16.5%	-2.0%	25.9%	12.7%	20.4%	24.0% **

\*The Hispanic population is a representation of the 60% of U.S. Hispanics who speak English only or who are bilingual. (See page 236 for detail on Hispanic population definition.)

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

\*\*\* The data represents statistically and directionally relevant information, but due to small sample sizes the degree calculated appears overstated.

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

# ETHNICITY: MULTI-PARTICIPATION

Black/African American participants were most likely to participate in only one outdoor activity (41.5%) compared to Caucasians/Whites and Hispanics. On average, Hispanics participated more frequently (53.7 outings on average) than did Caucasians/Whites which is due to the greater participation of younger Hispanics. The same is true of Black/African-Americans participants who also tend to be younger.

Number of Human Powered Activities Participated In During 2005	Caucasian/ White	Hispanic**	Black/ African-American
1 activity only	25.9%	23.9%	41.5%
2 activities	19.1%	22.7%	18.1%
3	16.9%	16.8%	12.5%
4	11.9%	10.7%	8.0%
5	7.9%	9.0%	4.7%
6	6.7%	6.2%	5.0%
7	4.6%	4.6%	5.9%
8	2.9%	3.8%	1.7%
9	1.6%	0.7%	0.9%
10	1.2%	1.2%	0.7%
11	0.6%	0.0%	0.5%
12	0.3%	0.0%	0.7%
13	0.0%	0.0%	0.0%
14	0.3%	0.4%	0.0%
15	0.0%	0.0%	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	0.0%	0.0%	0.0%
22 activities	0.0%	0.0%	0.0%
<b>Mean # of Activities Participated In</b>	<b>3.4</b>	<b>3.3</b>	<b>2.8</b>
<b>Mean # of Outings</b>	<b>44.3</b>	<b>53.7</b>	<b>48.4</b>

\*\*The Hispanic population is a representation of the 60% of U.S. Hispanics who speak English only or who are bilingual. (See page 236 for detail on Hispanic population definition.)  = Significant difference from other groups

# ETHNICITY: DEMOGRAPHIC PROFILE TRENDS

White/Caucasian participants are likely to be older (59% 35 and older), while Hispanic and Black/African American participants are more likely to be younger. Four in ten Hispanic participants and four in ten Black/African American participants are between the ages of 16 and 24 while only 20% of White/Caucasian participants are in this age grouping.

## Demographic Profile

Participants	White/Caucasian			Hispanic**			Black/African American		
	2003	2004	2005	2003	2004	2005	2003	2004	2005
<b>Gender</b>									
Male	55%	55%	54%	56%	63%	66%	56%	53%	60%
Female	45%	45%	46%	44%	37%	34%	44%	47%	40%
<b>Age</b>									
16 to 24	24%	21%	20%	39%	42%	42%	46%	41%	40%
25 to 34	19%	21%	20%	20%	20%	22%	19%	20%	21%
35 to 44	21%	20%	22%	23%	18%	18%	14%	16%	20%
45+	36%	37%	37%	19%	20%	19%	21%	23%	19%
<b>Marital Status</b>									
Married	54%	57%	58%	46%	32%	37%	26%	32%	32%
Unmarried	46%	43%	42%	54%	68%	62%	74%	68%	68%
<b>Children &lt;18</b>									
Yes	47%	47%	45%	64%	59%	58%	61%	62%	63%
<b>Household Income</b>									
<\$40k	35%	33%	31%	48%	52%	42%	59%	49%	46%
\$40k - \$79k	41%	41%	40%	34%	34%	38%	25%	35%	36%
\$80k+	24%	26%	29%	18%	14%	20%	15%	16%	18%
<b>Region</b>									
Northeast	19%	19%	19%	10%	13%	12%	19%	12%	17%
South Central	32%	32%	33%	13%	12%	8%	53%	59%	54%
North Central	26%	26%	25%	12%	11%	8%	18%	17%	12%
West	23%	23%	23%	44%	45%	51%	10%	12%	17%

\*\*The Hispanic population is a representation of the 60% of U.S. Hispanics who speak English only or who are bilingual. (See page 236 for detail on Hispanic population definition.)

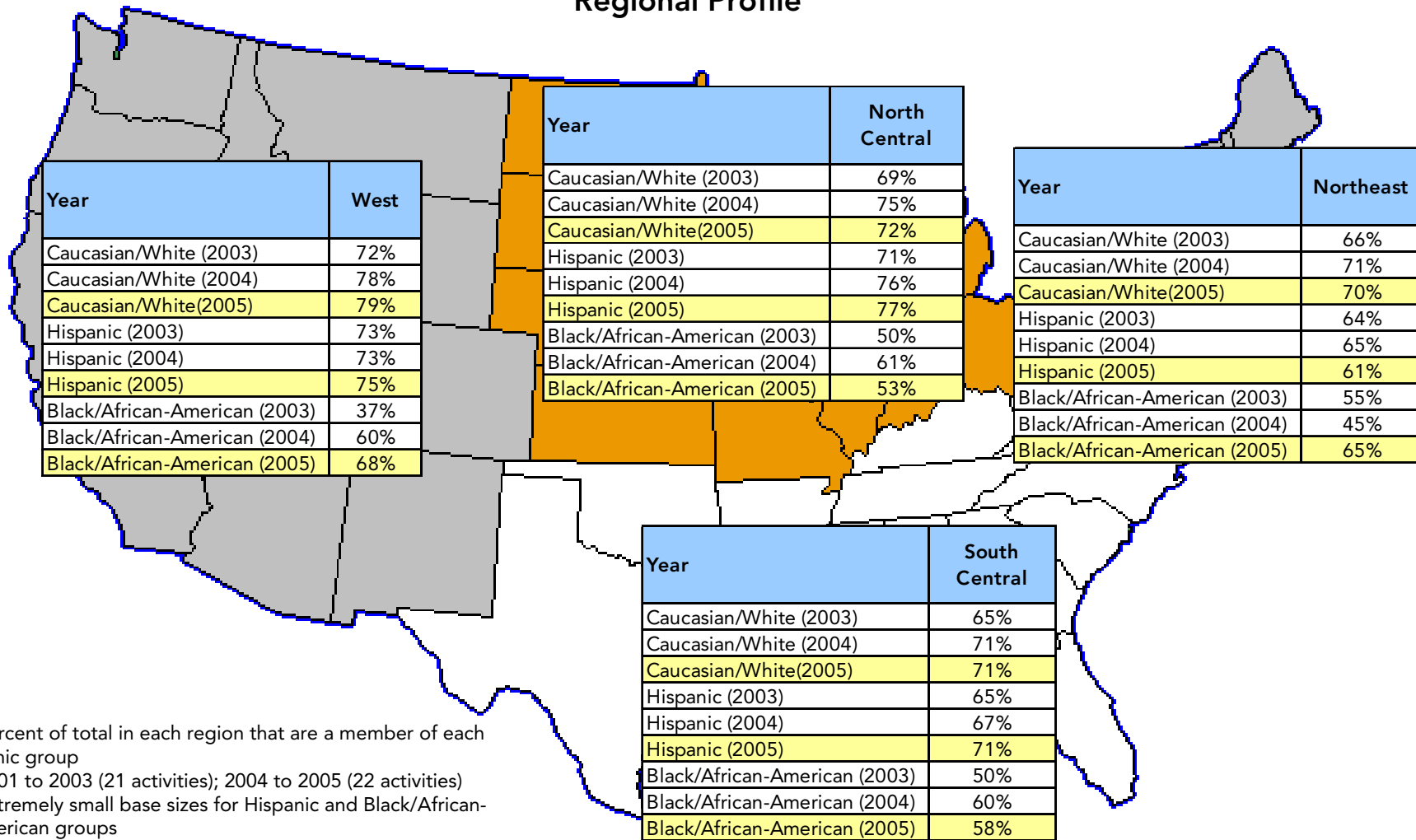
  = Significant difference from 2003

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

# ETHNICITY: WHERE PARTICIPANTS LIVE\*\*

The Western region has the greatest percentage of Caucasian/White, Hispanic and Black/African American participants among their populations.

## Regional Profile



- Percent of total in each region that are a member of each ethnic group
- 2001 to 2003 (21 activities); 2004 to 2005 (22 activities)
- Extremely small base sizes for Hispanic and Black/African-American groups

\*\*The Hispanic population is a representation of the 60% of U.S. Hispanics who speak English only or who are bilingual. (See page 236 for detail on Hispanic population definition.)

OUTDOOR RECREATION PARTICIPATION STUDY  
**NON-PARTICIPANTS**

NON-PARTICIPANTS

# NON-PARTICIPANTS VS. PARTICIPANTS

The sizeable population (more than 63 million) of Americans 16 and older who did not participate in any outdoor activities during 2005 differ demographically from the year 2005 Participant population.

Non-Participants are more likely to be female, older and less affluent.

<b><u>Dimension</u></b>	<b><u>Non-Participants</u></b>	<b><u>Participants</u></b>
Majority Gender	Females (64%)	Males (56%)
Mean Age	52.0	38.0
Mean Household Income	\$46,450	\$63,400
Ethnicity	Caucasian (76%) African-American (13%) Hispanic (9%)	Caucasian (78%) African-American (8%) Hispanic (11%)

\*Ethnicity: Will not add to 100%, see page 239 for details.

# NON-PARTICIPANTS: DEMOGRAPHIC PROFILE TRENDS

As a group, Non-Participants tend to be female (64%), 45 years of age or older (64%) and ethnically diverse. In 2005, Non-Participants are more likely to be female and older compared to participants in 2003. However, participation in 2003 did not include Fishing Non-Fly as an outdoor activity.

## Demographic Profile

Participants	1998 (13 activities)	1999 (13 activities)	2000 (13 activities)	2001 (21 activities)	2002 (21 activities)	2003 (21 activities)	2004 (22 activities)	2005 (22 activities)
<b>Gender</b>								
Male	35%	39%	38%	40%	42%	40%	36%	36%
Female	65%	61%	62%	60%	58%	60%	64%	64%
<b>Age</b>								
16 to 24	10%	9%	11%	13%	14%	13%	12%	10%
25 to 34	11%	12%	15%	16%	13%	14%	15%	13%
35 to 44	15%	14%	13%	14%	15%	14%	13%	12%
45+	64%	65%	62%	57%	59%	59%	60%	64%
<b>Marital Status</b>								
Married	51%	53%	51%	45%	48%	49%	47%	51%
Unmarried	49%	47%	49%	54%	52%	51%	53%	49%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	74%	72%	76%
African-American	N/A	N/A	N/A	N/A	N/A	14%	14%	13%
Hispanic	N/A	N/A	N/A	N/A	N/A	8%	10%	9%
Asian	N/A	N/A	N/A	N/A	N/A	2%	2%	2%
<b>Children &lt;18</b>								
Yes	28%	29%	30%	31%	31%	33%	32%	31%
<b>Household Income</b>								
<\$40k	N/A	59%	62%	59%	58%	54%	56%	54%
\$40k - \$79k	N/A	35%	33%	31%	30%	33%	31%	32%
\$80k+	N/A	6%	5%	10%	11%	13%	13%	14%
<b>Region</b>								
Northeast	23%	18%	15%	19%	20%	19%	22%	21%
South Central	36%	40%	43%	41%	37%	38%	38%	38%
North Central	23%	23%	23%	21%	23%	22%	21%	23%
West	17%	19%	19%	19%	19%	21%	19%	19%

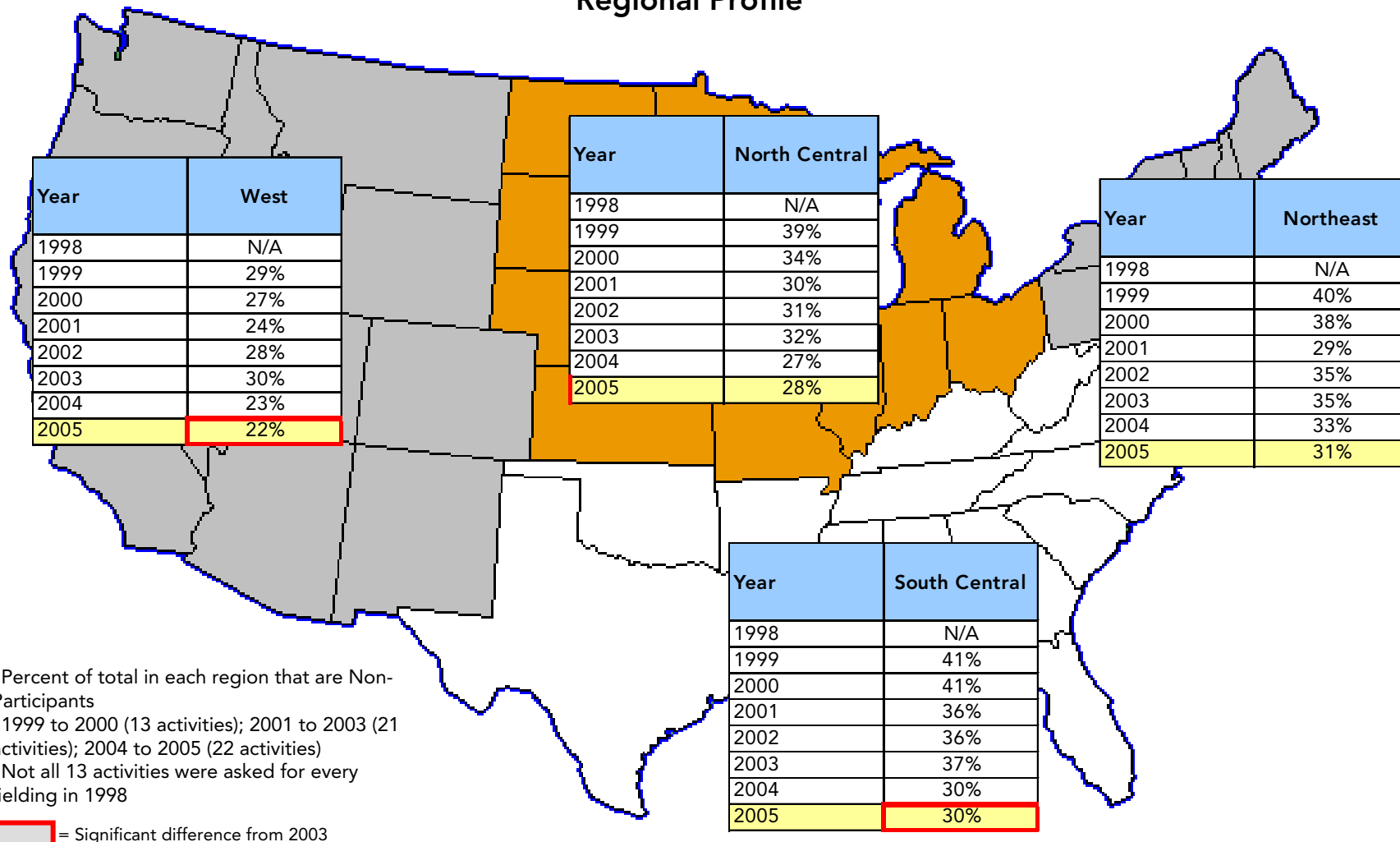
= Significant difference from 2003



# NON-PARTICIPANTS: WHERE THEY LIVE\*

Westerners are the least likely to be Non-Participants.

## Regional Profile



OUTDOOR RECREATION PARTICIPATION STUDY  
**ACTIVITIES TRACKED SINCE 1998**

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: 13.5 MILLION PARTICIPANTS, 81 MILLION OUTINGS

## THE 2005 AMERICAN BACKPACKER

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

## MAJOR TRENDS IN BACKPACKING

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

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

### Year 2005 Events of Note

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



### Observation/Implication

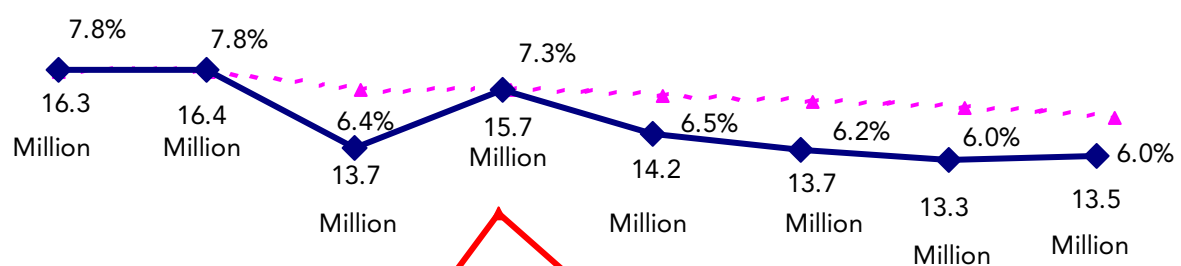
The American backpacker is growing-up and has more money to spend on gear, travel, etc.

# BACKPACKING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

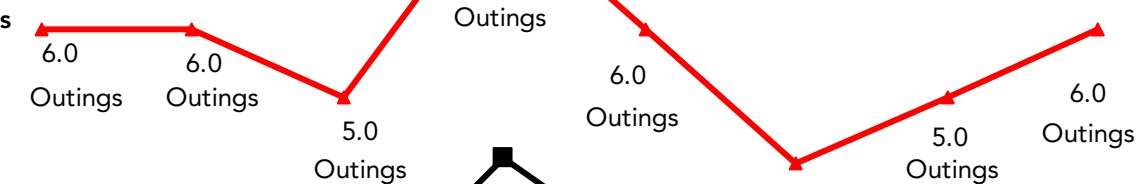
During the past eight years, the number of total outings generated by Americans 16 and older who went backpacking peaked in 2001 when the average number of outings equaled eight—pushing the total number of outings in 2001 to 126 million.

In the past three years the number of Americans participating in backpacking has remained stable but is still well below the record levels measured from 1998 to 2001. Although participation remained stable, mean outings increased from four outings in 2003 to six outings in 2005, which yielded an additional 26 million outings over the past two years.

**Number & Percentage of Participants**



**Average Number of Outings**



**Total Number of Outings**



..... Rolling Trend Average

# BACKPACKING: FREQUENCY OF PARTICIPATION

During 2005, backpacking Participants averaged six outings—yielding a one year increase of 14 million in total outings (81 million in 2005) from the previous year (67million).

The backpacking population has historically been comprised of a significant percentage of Participants who go on only one outing per year. During 2005 more than one-third (37%) of Participants fit this “casual” frequency profile.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	30%	25%	31%	33%	31%	35%	38%	37%
2 times	24%	21%	23%	17%	25%	27%	18%	23%
3 to 6 times	32%	35%	30%	33%	30%	29%	30%	28%
7 to 10 times	2%	8%	8%	6%	3%	5%	6%	5%
11 or more times (NET)	12%	12%	9%	11%	11%	5%	8%	8%
11 to 30 times	11%	10%	7%	9%	7%	4%	5%	6%
31 or more times	1%	1%	2%	2%	4%	1%	3%	2%
<b>Average Frequency</b>	<b>6.0</b>	<b>6.0</b>	<b>5.0</b>	<b>8.0</b>	<b>6.0</b>	<b>4.0</b>	<b>5.0</b>	<b>6.0</b>
<b>Total Outings (Millions)</b>	<b>98</b>	<b>98</b>	<b>69</b>	<b>126</b>	<b>85</b>	<b>55</b>	<b>67</b>	<b>81</b>

# BACKPACKING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

The 2005 backpacking Participant population is comprised primarily of younger male Americans. Approximately, three-quarters of Participants are male (74%) and are between the ages of 16 and 34 (67%). However, the backpacking population is getting slightly older. This is the first year since 1999 when the percentage of backpackers between the ages of 25 and 44 surpassed the percentage of backpackers between the ages of 16 and 24. The 2005 backpacker is more affluent than in previous years.

## Demographic Profile

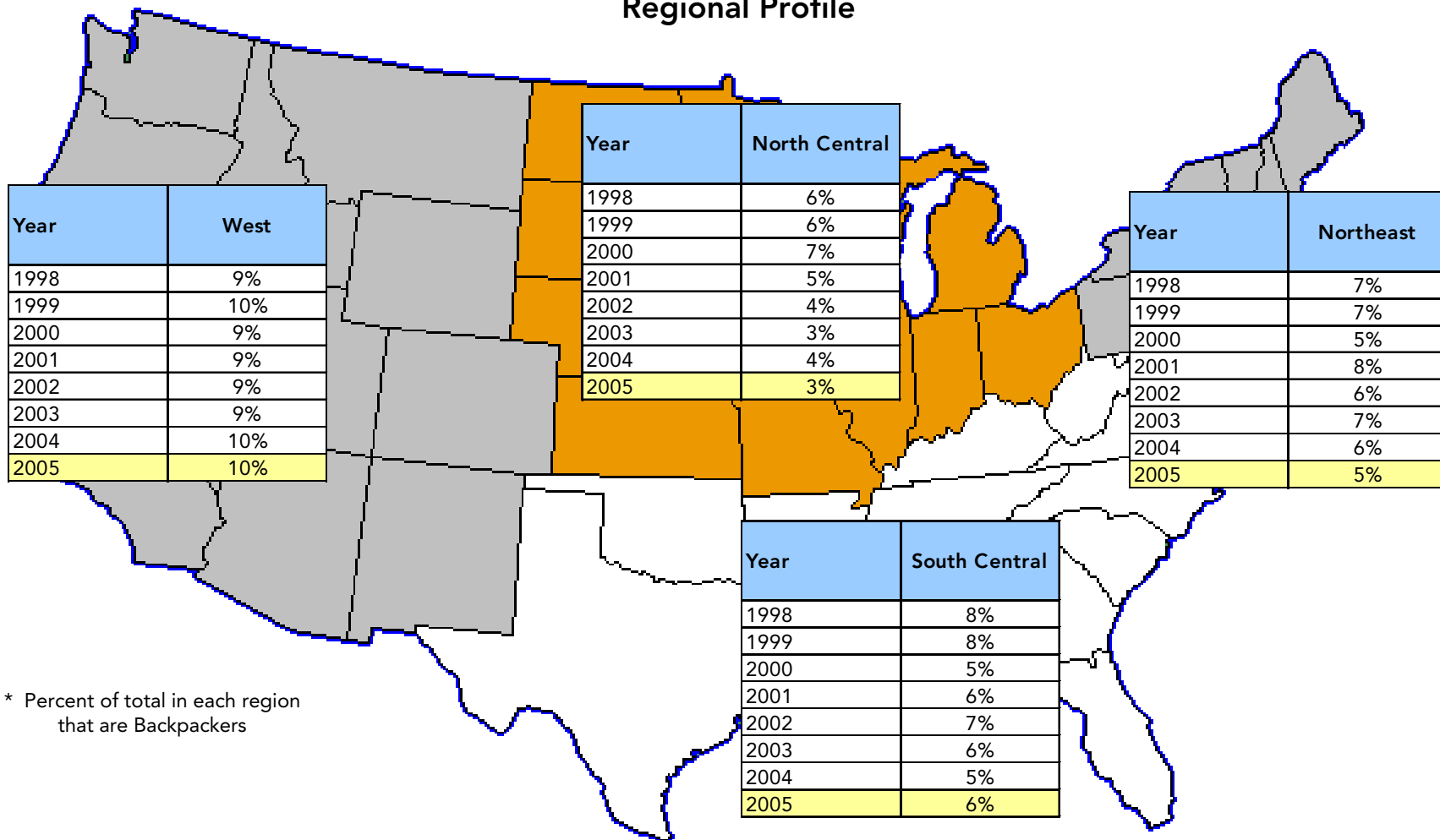
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	71%	71%	71%	67%	71%	70%	75%	74%
Female	29%	29%	29%	33%	29%	30%	25%	26%
<b>Age</b>								
16 to 24	39%	33%	42%	41%	43%	45%	50%	41%
25 to 34	23%	29%	25%	24%	17%	22%	21%	26%
35 to 44	21%	22%	17%	17%	17%	14%	14%	19%
45+	17%	16%	16%	18%	23%	19%	15%	14%
<b>Marital Status</b>								
Married	34%	41%	35%	31%	33%	36%	32%	40%
Unmarried	66%	58%	65%	69%	67%	63%	68%	60%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	70%	69%	68%
African-American	N/A	N/A	N/A	N/A	N/A	10%	10%	12%
Hispanic	N/A	N/A	N/A	N/A	N/A	13%	16%	12%
Asian	N/A	N/A	N/A	N/A	N/A	5%	5%	4%
Other	N/A	N/A	N/A	N/A	N/A	7%	7%	10%
<b>Children &lt;18</b>								
Yes	43%	49%	54%	36%	41%	51%	55%	56%
<b>Household Income</b>								
<\$40k	N/A	44%	42%	48%	42%	42%	38%	31%
\$40k - \$79k	N/A	47%	47%	40%	31%	37%	40%	37%
\$80k+	N/A	9%	11%	12%	27%	20%	22%	31%
<b>Region</b>								
Northeast	21%	16%	10%	22%	16%	20%	20%	17%
South Central	31%	37%	29%	31%	38%	36%	28%	32%
North Central	18%	16%	25%	15%	16%	11%	14%	12%
West	30%	30%	35%	32%	30%	32%	38%	39%

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

# BACKPACKING: WHERE PARTICIPANTS LIVE\*

The Western region has the greatest percentage of backpackers among the population. One in ten Westerners are backpackers compared to 6% of the population nationally. The North Central region has the smallest number of backpackers among its population (3%).

## Regional Profile



\* Percent of total in each region that are Backpackers




# BACKPACKING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Hiking, camping, bicycling and fishing are the activities that backpackers are most likely to have also participated in during 2005. A greater percentage of backpackers in 2005 are car camping compared to 2003 & 2004.

## Crossover Activities

Activities	Backpackers in 2003	Backpackers In 2004	Backpackers in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>13,483,384</b>
<b>Bicycling (Any Type)</b>	60%	63%	64%	8,678,683
Bicycling (Paved Road)	52%	56%	57%	7,729,367
<b>Bicycling (Mountain)</b>	49%	51%	48%	6,538,851
Bicycling (Single Track)	40%	44%	41%	5,462,117
Bicycling (Dirt Road)	41%	43%	38%	5,141,982
Bird Watching	15%	14%	17%	2,357,072
<b>Camping (Any Type)</b>	<b>75%</b>	<b>77%</b>	<b>79%</b>	<b>10,587,911</b>
Camping (Away from Car)	56%	58%	55%	7,469,724
Camping (Car)	24%	24%	31%	4,240,103
Canoeing	29%	28%	26%	3,547,912
<b>Climbing (Any Type)</b>	<b>18%</b>	<b>15%</b>	<b>20%</b>	<b>2,703,617</b>
Climbing (Artificial Wall)	12%	11%	12%	1,641,093
Climbing (Natural Rock)	14%	13%	13%	385,285
Climbing (Ice)	2%	3%	3%	1,816,575
Cross-Country/Nordic Skiing	13%	17%	13%	1,789,509
<b>Fishing (Any Type)</b>	<b>N/A</b>	58%	58%	<b>7,792,111</b>
Fishing (Fly)	20%	24%	22%	3,026,956
Fishing (Non-Fly)	N/A	54%	53%	7,128,262
Hiking	75%	78%	77%	10,361,108
<b>Kayaking (Any Type)</b>	<b>16%</b>	17%	16%	<b>2,113,952</b>
<b>Kayaking (Non-Whitewater)</b>	<b>15%</b>	14%	14%	428,781
Kayaking (Sit-On-Top)	11%	10%	11%	1,953,597
Kayaking (Tour/Sea)	9%	10%	8%	1,448,671
Kayaking (Whitewater)	3%	8%	3%	1,056,519
<b>Paddle sports (Any Type)</b>	<b>39%</b>	39%	40%	<b>5,375,587</b>
Rafting	20%	16%	16%	2,122,217
Snowshoeing	10%	11%	12%	1,597,262
Telemark Skiing	6%	5%	7%	986,912
Trail Running	42%	42%	51%	6,916,158

 = Significant difference from 2003

OUTDOOR RECREATION PARTICIPATION STUDY

# **BICYCLING – PAVED ROAD, SINGLE TRACK, DIRT ROAD**

**“Have you gone bicycling on a paved road?”**

**Mountain Biking includes participants in the following:**

**“Have you gone bicycling on a dirt track less than five feet wide?”**

**“Have you gone bicycling on a dirt road more than five feet wide?”**

# BICYCLING: 85.8 MILLION PARTICIPANTS, 3.1 BILLION OUTINGS

## THE 2005 AMERICAN BICYCLIST

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

## MAJOR TRENDS IN BICYCLING

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

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

### Year 2005 Events of Note

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

### Observation/Implication

Mountain biking Participation is at greater risk than paved road biking.

## BICYCLING: SUB-ACTIVITIES

**MOUNTAIN BIKING\*: 50 MILLION PARTICIPANTS, .9 BILLION OUTINGS**

**PAVED ROAD BIKING: 78.5 MILLION PARTICIPANTS, 2.2 BILLION OUTINGS**

### THE 2005 AMERICAN MOUNTAIN BIKER

- Primarily male
- Young (16 to 34)
- Likely to live in the Western or South Central part of the U.S.
- Most (86%) also went paved road biking in 2005
- Averaged 19 outings in 2005
- Over three-quarters went single track bicycling and dirt road bicycling during the year.

### MAJOR TRENDS IN MOUNTAIN BIKING

In the early twenty-first century participation in mountain biking was at its strongest. The slow decline in participation since then coupled with significant decreases in the average number of outings per year yields a drop in total mountain biking outings of 1.1 million over the past five years.

- Gender: Males outnumber females in this sport nearly two to one.
- Ethnicity: Three-quarters of 2005 mountain bikers are Caucasian.

#### Year 2005 Event of Note:

16- to 34-year-olds comprise the majority of mountain bike participants.

#### Observation/Implication

Mountain biking is for the young.

### THE 2005 AMERICAN PAVED ROAD BIKER

- Relatively gender balanced with a slight favor toward males
- Participation among all age groups
- Likely to live in the Western or South Central part of the U.S.
- Averaged 28 outings in 2005, down from 33 in 2004
- About half (55%) also went mountain biking in 2005

### MAJOR TRENDS IN PAVED ROAD BIKING

Participation in paved road biking has remained relatively stable over the past eight years. Current participation is at 78.5 million. The average number of outings by paved road bikers has declined since 2001, yielding a decrease of .8 billion total outings between 2001 (3 billion) and 2005 (2.2 billion).

- Ethnicity: Over three-quarters of 2005 paved road bikers are Caucasian. Hispanics comprise 12% of Participants.

#### Year 2005 Event of Note:

Paved road biking captures a diverse age, income, and geographic group of Participants.

#### Observation/Implication

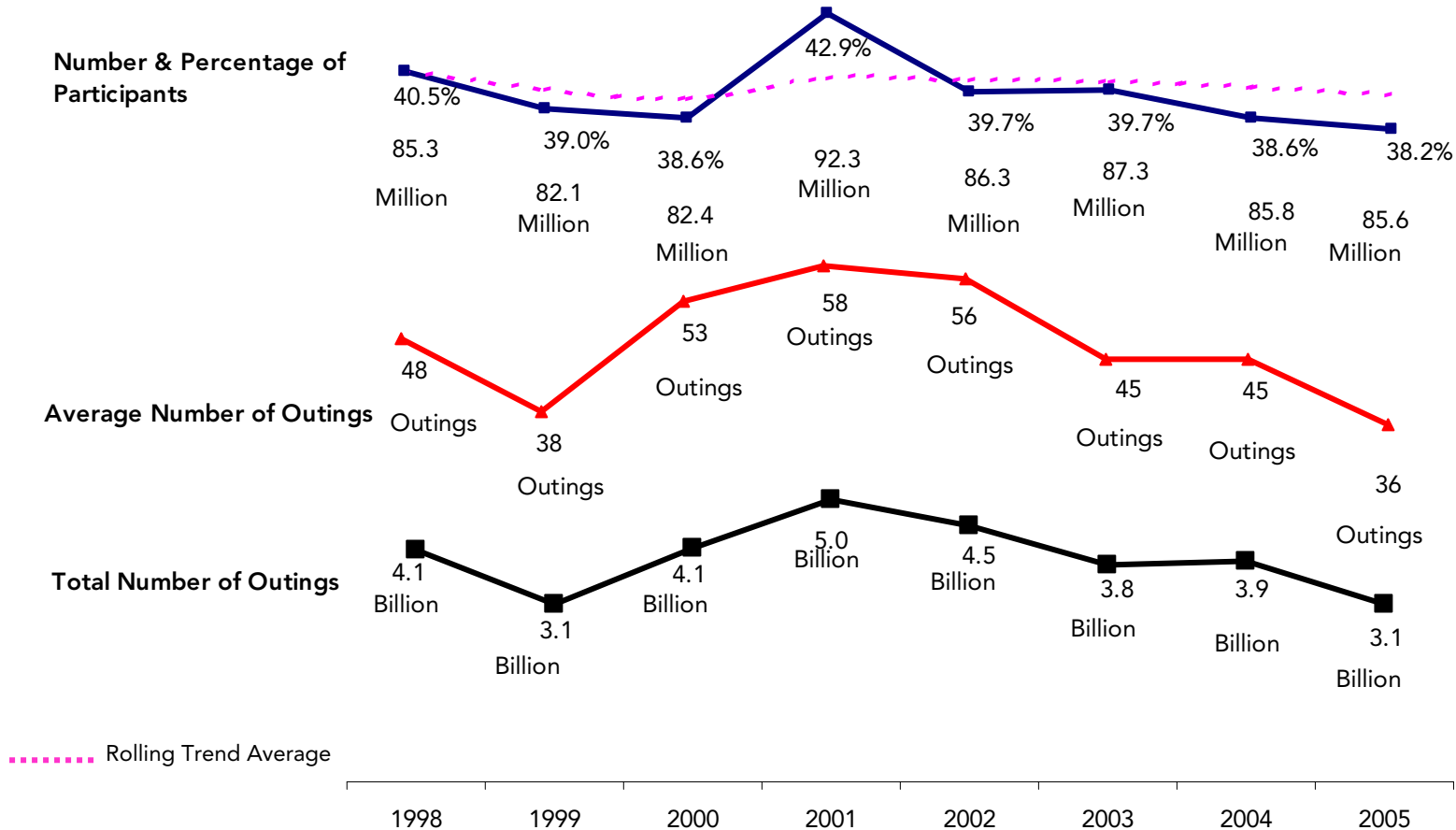
Paved road bicycling is a core activity and which can be utilized to gain participation in other outdoor activities

\*For 2005, Dirt Road Biking and off-road Single Track were combined into Mountain Biking. Individual data for those two categories is not included.

# BICYCLING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS\*

During the past eight years, the number of total outings generated by Americans 16 and older who went bicycling peaked in 2001 when the average number of outings equaled 58—pushing the total number of outings to 5.4 billion.

Over the past four years the number of Americans participating in bicycling has remained relatively stable but well below the peak recorded in 2001. After 2001, the decline in the number of Americans bicycling was accompanied by a decrease in the average number of outings each year.



\*Total Outings are calculated by summing Paved Road, Single Track and Dirt Road outings.

# BICYCLING: FREQUENCY OF PARTICIPATION

During 2005 bicycling Participants averaged 36 outings—yielding a one-year decrease of nearly 1 billion total outings (3.1 billion in 2005) from the previous year (3.9 billion).

Historically, about 60% of bicycling Participants go on 11 or more outings per year. In 2005 this proportion decreased significantly to 50%.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	4%	3%	3%	3%	2%	3%	4%	4%
2 times	6%	5%	6%	6%	5%	5%	5%	7%
3 to 6 times	15%	21%	20%	21%	20%	21%	22%	28%
7 to 10 times	13%	12%	10%	11%	10%	11%	11%	11%
<b>11 or more times (NET)</b>	<b>62%</b>	<b>60%</b>	<b>61%</b>	<b>59%</b>	<b>62%</b>	<b>60%</b>	<b>58%</b>	<b>50%</b>
11 to 15 times	13%	11%	11%	9%	11%	11%	11%	10%
16 to 20 times	7%	7%	7%	7%	7%	9%	8%	7%
21 to 50 times	19%	21%	20%	20%	21%	20%	17%	18%
51 to 100 times	11%	11%	11%	10%	10%	10%	11%	8%
101 times or more	12%	9%	14%	14%	14%	10%	11%	8%
<b>Average Frequency</b>	<b>48.0</b>	<b>38.0</b>	<b>53.0</b>	<b>58.0</b>	<b>56.0</b>	<b>45.0</b>	<b>45.0</b>	<b>36.0</b>
<b>Total Outings (Billions)</b>	<b>4.1</b>	<b>3.1</b>	<b>4.1</b>	<b>5.0</b>	<b>4.5</b>	<b>3.8</b>	<b>3.9</b>	<b>3.1</b>

\*Total Outings are calculated by summing Paved Road, Single Track and Dirt Road outings.

= Significant difference from 2003

# BICYCLING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

In 1998 the gender split among bicycling Participants was an even 50/50. Over the past seven years females have dropped out of the sport while males have joined. In 2005 the gender split is 58/42 in favor of males.

## Demographic Profile

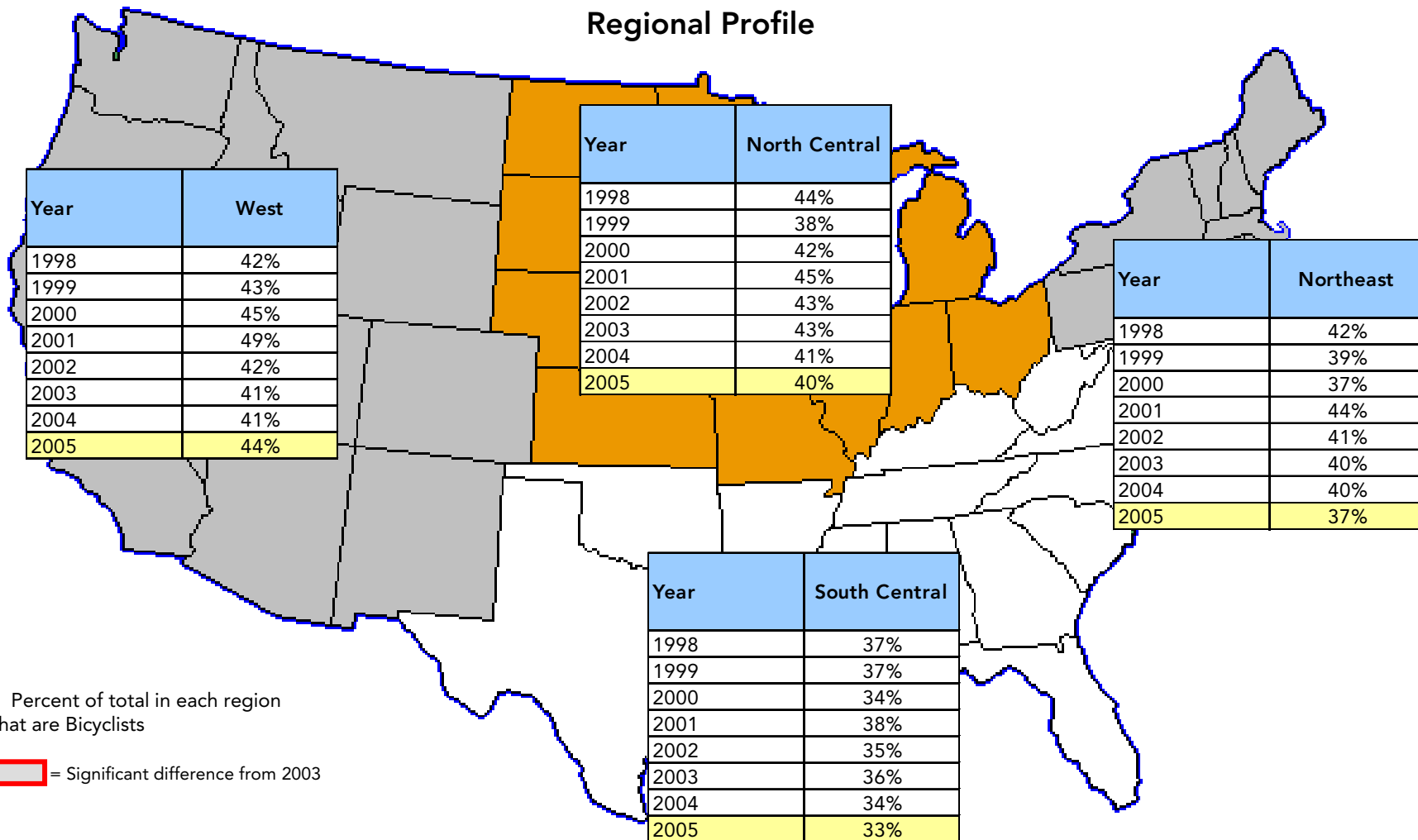
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	50%	51%	53%	54%	55%	57%	57%	58%
Female	50%	49%	47%	46%	45%	43%	43%	42%
<b>Age</b>								
16 to 24	25%	23%	30%	29%	30%	30%	29%	29%
25 to 34	20%	22%	22%	24%	22%	22%	21%	21%
35 to 44	26%	26%	22%	21%	21%	21%	21%	24%
45+	29%	29%	26%	26%	28%	28%	28%	27%
<b>Marital Status</b>								
Married	51%	53%	49%	44%	49%	49%	49%	53%
Unmarried	49%	47%	51%	55%	51%	51%	51%	47%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	78%	78%	76%
African-American	N/A	N/A	N/A	N/A	N/A	8%	9%	8%
Hispanic	N/A	N/A	N/A	N/A	N/A	10%	11%	11%
Asian	N/A	N/A	N/A	N/A	N/A	3%	1%	2%
Other	N/A	N/A	N/A	N/A	N/A	4%	6%	7%
<b>Children &lt;18</b>								
Yes	49%	51%	53%	47%	49%	55%	55%	54%
<b>Household Income</b>								
<\$40k	N/A	40%	41%	40%	35%	36%	32%	32%
\$40k - \$79k	N/A	48%	49%	43%	41%	40%	40%	40%
\$80k+	N/A	12%	11%	17%	24%	24%	27%	28%
<b>Region</b>								
Northeast	21%	17%	13%	20%	20%	19%	20%	18%
South Central	32%	34%	32%	31%	30%	32%	31%	30%
North Central	27%	22%	27%	22%	27%	25%	24%	24%
West	20%	27%	28%	27%	23%	24%	25%	28%

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

# BICYCLING: WHERE PARTICIPANTS LIVE\*

Forty-four percent of Westerners are cyclists compared to 33% of those living in the South Central region.

## Regional Profile





# BICYCLING: CROSSOVER ACTIVITY TRENDS

Other activities that bicycling Participants are most likely to also participate in during 2005 include camping (car), fishing (non-fly) and hiking.

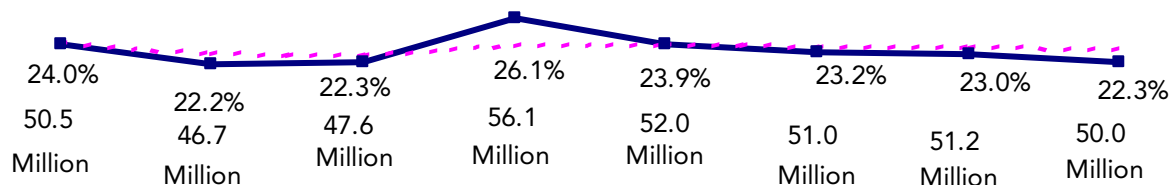
## Crossover Activities

Activities	Bicyclists in 2003	Bicyclists In 2004	Bicyclists in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	9%	10%	10%	8,685,895
<b>Bicycling (Any Type)</b>	100%	100%	100%	85,604,459
Bicycling (Paved Road)	89%	92%	92%	78,538,129
<b>Bicycling (Mountain)</b>	58%	60%	58%	50,040,645
Bicycling (Single Track)	45%	46%	46%	39,021,760
Bicycling (Dirt Road)	45%	47%	44%	38,091,502
Bird Watching	8%	8%	8%	6,799,089
<b>Camping (Any Type)</b>	44%	42%	44%	37,365,278
Camping (Away from Car)	11%	13%	13%	10,844,363
Camping (Car)	33%	29%	32%	27,285,346
Canoeing	16%	17%	14%	12,296,338
<b>Climbing (Any Type)</b>	7%	6%	8%	6,579,261
Climbing (Artificial Wall)	5%	4%	5%	4,705,195
Climbing (Natural Rock)	4%	4%	4%	3,486,683
Climbing (Ice)	1%	1%	1%	581,360
Cross-Country/Nordic Skiing	8%	7%	8%	6,495,019
<b>Fishing (Any Type)</b>	N/A	45%	43%	37,048,750
Fishing (Fly)	8%	10%	10%	8,179,784
Fishing (Non-Fly)	N/A	43%	41%	35,252,613
Hiking	49%	51%	52%	44,450,088
<b>Kayaking (Any Type)</b>	8%	8%	10%	8,145,744
<b>Kayaking (Non-Whitewater)</b>	7%	8%	9%	7,801,416
Kayaking (Sit-On-Top)	5%	6%	7%	5,848,716
Kayaking (Tour/Sea)	5%	5%	4%	3,807,542
Kayaking (Whitewater)	2%	2%	2%	1,473,514
<b>Paddle sports (Any Type)</b>	24%	23%	23%	19,985,245
Rafting	8%	7%	8%	6,717,947
Snowshoeing	4%	3%	4%	3,648,951
Telemark Skiing	4%	3%	2%	2,129,408
Trail Running	29%	31%	29%	25,245,867

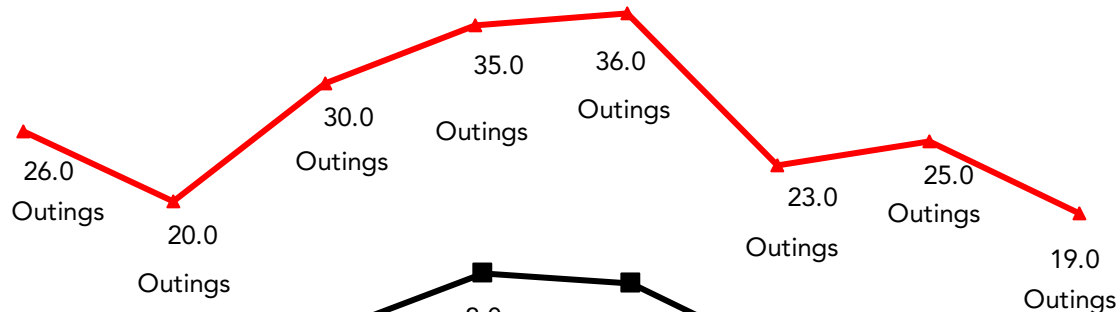
# MOUNTAIN BIKING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS\*

With the exception of a small peak in 2001 the number of mountain biking Participants has remained relatively stable over the past eight years. The average number of outings, however, has fluctuated significantly over this time yielding a similar fluctuation in total number outings. Since 2001 total outings have decreased by 1.1 billion trips to 0.9 billion in 2005. Similarly, average outings have decreased by 17 trips from a peak in 2002 of 36 to the lowest in eight years of 19.

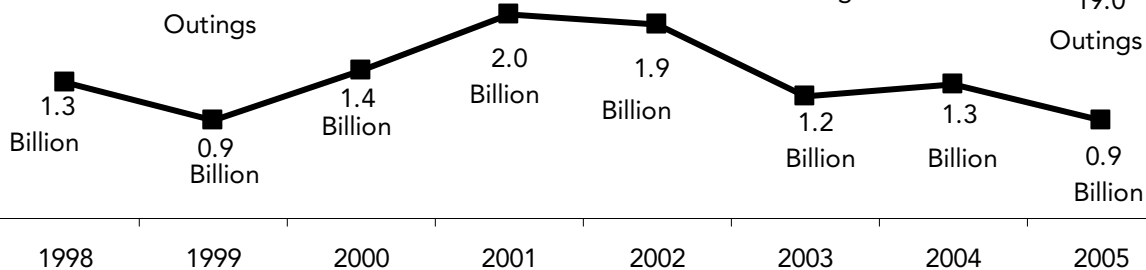
Number & Percentage of Participants



Average Number of Outings



Total Number of Outings



..... Rolling Trend Average

\*Total Outings are calculated by summing Single Track and Dirt Road outings.

# MOUNTAIN BIKING: FREQUENCY OF PARTICIPATION

During 2005 mountain biking Participants averaged 19 outings—yielding a one-year decrease of 400 million total outings (0.9 billion in 2005) from the previous year (1.3 billion).

Between 1998 and 2002, about 40% of mountain biking Participants took 11 or more outings per year. The last three years reveal a decrease in this proportion to less than one-third of participants; it is primarily driven by a significant decrease in the proportion of mountain biking Participants who take 51 or more outings per year.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	9%	8%	7%	8%	6%	7%	8%	9%
2 times	12%	14%	12%	12%	11%	14%	14%	16%
3 to 6 times	26%	27%	26%	27%	26%	33%	29%	33%
7 to 10 times	15%	12%	12%	12%	12%	13%	11%	11%
<b>11 or more times (NET)</b>	<b>38%</b>	<b>38%</b>	<b>43%</b>	<b>40%</b>	<b>44%</b>	<b>34%</b>	<b>38%</b>	<b>30%</b>
11 to 30 times	23%	22%	23%	19%	23%	20%	22%	19%
31 to 50 times	5%	8%	6%	5%	5%	5%	6%	6%
51 or more times	10%	9%	13%	15%	16%	9%	10%	5%
<b>Average Frequency</b>	<b>26.0</b>	<b>20.0</b>	<b>30.0</b>	<b>35.0</b>	<b>36.0</b>	<b>23.0</b>	<b>25.0</b>	<b>19.0</b>
<b>Total Outings (Billions)</b>	<b>1.3</b>	<b>0.9</b>	<b>1.4</b>	<b>2.0</b>	<b>1.9</b>	<b>1.2</b>	<b>1.3</b>	<b>0.9</b>

\*Total Outings are calculated by summing Single Track and Dirt Road outings.

= Significant difference from 2003

# MOUNTAIN BIKING: DEMOGRAPHIC PROFILE TRENDS

In 1998 the gender split among mountain biking Participants was about 50/50. Over the past seven years this ratio has grown to favor males nearly two-to-one over females.

Over this time the sport sees an increase in more affluent participants as well as an increase in Participants in the West.

## Demographic Profile

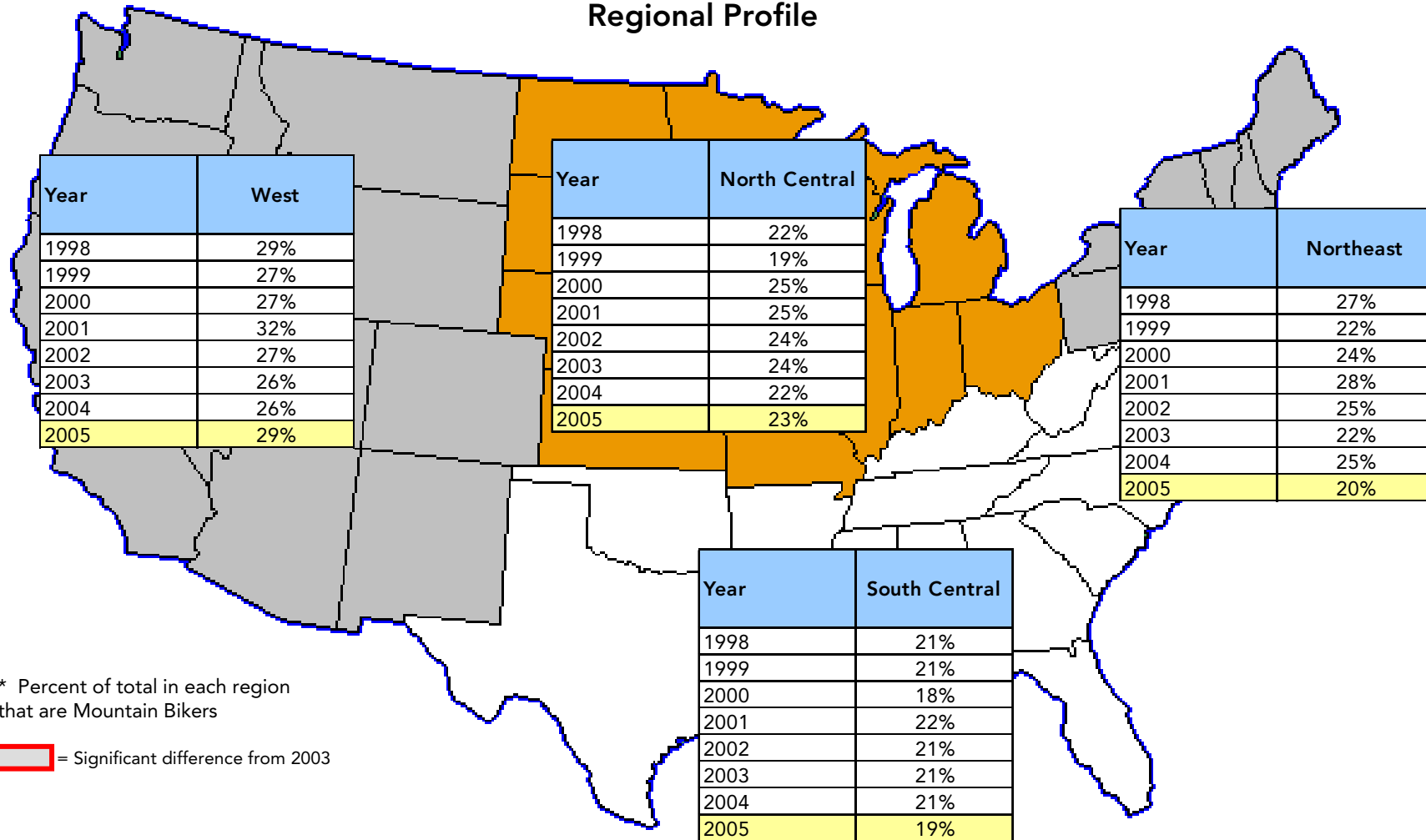
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	51%	58%	57%	56%	59%	61%	62%	63%
Female	49%	42%	43%	44%	41%	39%	38%	37%
<b>Age</b>								
16 to 24	34%	30%	38%	34%	35%	38%	37%	36%
25 to 34	20%	22%	23%	25%	23%	22%	21%	21%
35 to 44	23%	24%	19%	21%	19%	18%	19%	21%
45+	22%	23%	20%	20%	23%	22%	23%	22%
<b>Marital Status</b>								
Married	44%	47%	43%	40%	45%	42%	43%	46%
Unmarried	56%	53%	57%	60%	54%	58%	57%	54%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	76%	77%	75%
African-American	N/A	N/A	N/A	N/A	N/A	8%	9%	8%
Hispanic	N/A	N/A	N/A	N/A	N/A	11%	12%	13%
Asian	N/A	N/A	N/A	N/A	N/A	4%	1%	2%
Other	N/A	N/A	N/A	N/A	N/A	5%	7%	8%
<b>Children &lt;18</b>								
Yes	50%	52%	55%	48%	50%	55%	55%	55%
<b>Household Income</b>								
<\$40k	N/A	38%	42%	40%	36%	38%	33%	34%
\$40k - \$79k	N/A	51%	48%	44%	41%	41%	41%	40%
\$80k+	N/A	10%	10%	16%	23%	21%	27%	27%
<b>Region</b>								
Northeast	23%	17%	14%	21%	20%	18%	20%	17%
South Central	31%	34%	29%	29%	30%	32%	31%	29%
North Central	23%	20%	27%	20%	25%	24%	22%	23%
West	24%	30%	29%	30%	25%	26%	27%	31%

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

# MOUNTAIN BIKING: WHERE PARTICIPANTS LIVE\*

Mountain biking Participants are relatively evenly distributed across the continental U.S. Twenty-nine percent of Westerners are mountain bikers.

## Regional Profile



# MOUNTAIN BIKING: CROSSOVER ACTIVITY TRENDS

Other activities that mountain biking Participants are most likely to also participate in during 2005 include hiking, camping (car) and fishing (non-fly).

## Crossover Activities

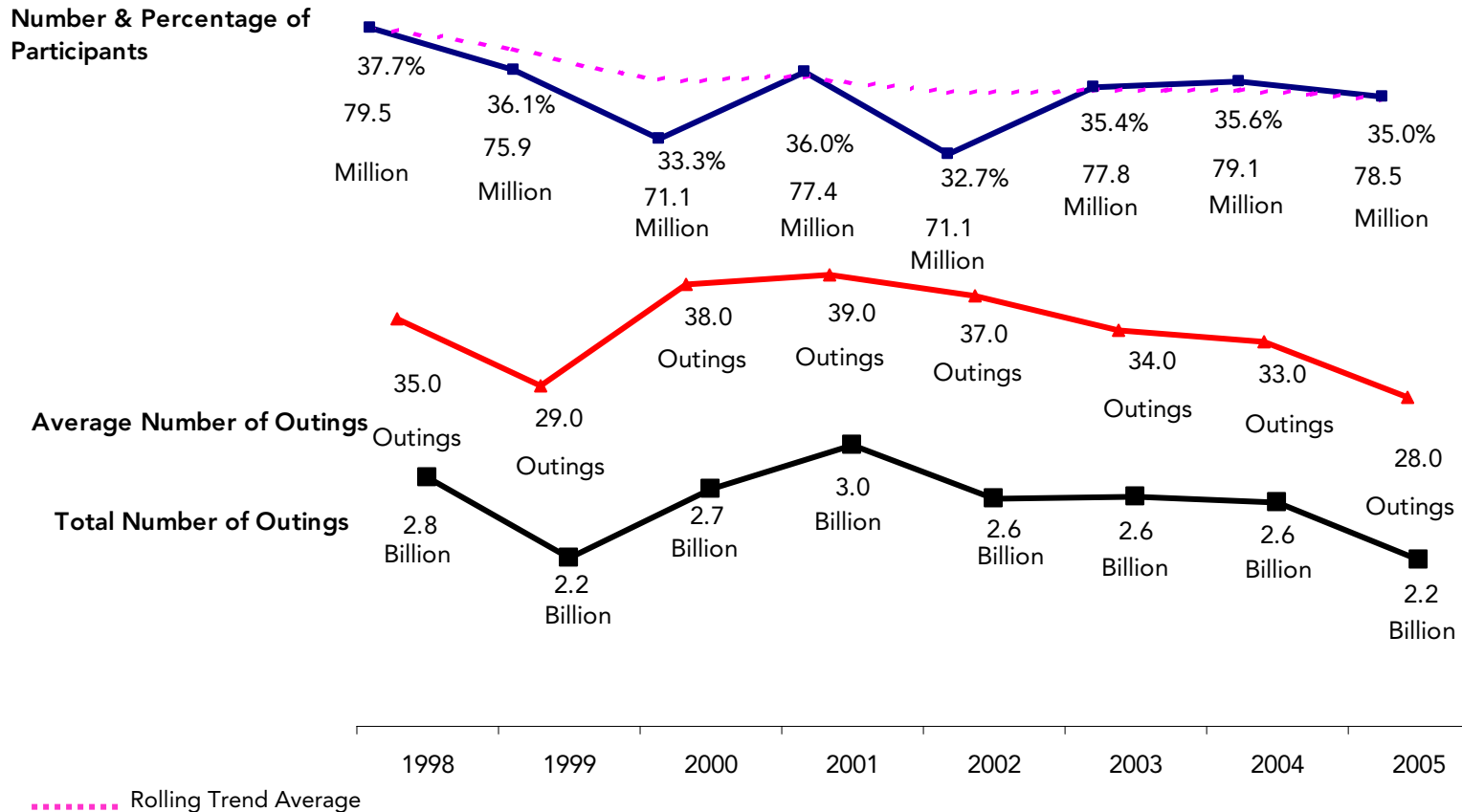
Activities	Mountain Bike in 2003	Mountain Bike In 2004	Mountain Bike in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	13%	13%	13%	6,538,851
<b>Bicycling (Any Type)</b>	100%	100%	100%	49,999,097
Bicycling (Paved Road)	86%	87%	86%	42,938,633
<b>Bicycling (Mountain)</b>	100%	100%	100%	49,999,097
Bicycling (Single Track)	77%	77%	78%	38,989,360
Bicycling (Dirt Road)	77%	78%	76%	38,059,875
Bird Watching	10%	8%	10%	5,155,703
<b>Camping (Any Type)</b>	51%	48%	50%	24,823,338
Camping (Away from Car)	15%	18%	17%	8,602,530
Camping (Car)	36%	31%	34%	16,851,809
Canoeing	18%	21%	17%	8,354,971
<b>Climbing (Any Type)</b>	9%	8%	10%	4,967,361
Climbing (Artificial Wall)	7%	6%	7%	3,587,873
Climbing (Natural Rock)	5%	6%	6%	2,774,959
Climbing (Ice)	1%	1%	1%	525,424
Cross-Country/Nordic Skiing	10%	9%	11%	5,303,672
<b>Fishing (Any Type)</b>	N/A	50%	49%	24,639,552
Fishing (Fly)	11%	13%	12%	5,970,926
Fishing (Non-Fly)	N/A	48%	47%	23,538,042
Hiking	56%	57%	58%	29,196,885
<b>Kayaking (Any Type)</b>	10%	10%	12%	6,000,006
<b>Kayaking (Non-Whitewater)</b>	10%	9%	11%	5,704,021
Kayaking (Sit-On-Top)	6%	7%	8%	3,908,161
Kayaking (Tour/Sea)	7%	6%	6%	3,157,244
Kayaking (Whitewater)	2%	2%	3%	1,265,270
<b>Paddle sports (Any Type)</b>	27%	28%	28%	13,758,080
Rafting	9%	9%	10%	4,848,634
Snowshoeing	5%	4%	6%	2,885,958
Telemark Skiing	4%	3%	3%	1,388,656
Trail Running	37%	40%	39%	19,678,862

= Significant difference from 2003

# PAVED ROAD BIKING: PARTICIPATION & FREQUENCY'S IMPACT ON TOTAL OUTINGS

Participation in paved road biking has remained relatively stable over the past eight years. Current participation is at 78.5 million.

The average number of outings by paved road bikers has declined since 2001, yielding a decrease of .8 billion total outings between 2001 (3.0 billion) and 2005 (2.2 billion).



# PAVED ROAD BIKING: FREQUENCY OF PARTICIPATION

During 2005, paved road biking Participants averaged 28 outings—yielding a one-year decrease of 400 million total outings (2.2 billion in 2005) from the previous year (2.6 billion).

2005 saw a significant increase over 2003 of road biking Participants taking a single outing.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	5%	6%	7%	7%	6%	6%	7%	10%
2 times	10%	8%	6%	9%	9%	8%	7%	9%
3 to 6 times	20%	24%	24%	23%	24%	24%	25%	27%
7 to 10 times	13%	13%	11%	12%	9%	12%	10%	11%
<b>11 or more times (NET)</b>	<b>52%</b>	<b>49%</b>	<b>51%</b>	<b>50%</b>	<b>52%</b>	<b>50%</b>	<b>50%</b>	<b>43%</b>
11 to 15 times	11%	12%	9%	8%	10%	9%	10%	9%
16 to 20 times	9%	6%	9%	9%	9%	11%	8%	9%
21 to 50 times	16%	19%	18%	17%	16%	17%	15%	14%
51 to 100 times	9%	7%	8%	8%	8%	8%	10%	6%
101 times or more	7%	5%	8%	8%	8%	6%	6%	5%
<b>Average Frequency</b>	<b>35.0</b>	<b>29.0</b>	<b>38.0</b>	<b>39.0</b>	<b>37.0</b>	<b>34.0</b>	<b>33.0</b>	<b>28.0</b>
<b>Total Outings (Billions)</b>	<b>2.8</b>	<b>2.2</b>	<b>2.7</b>	<b>3.0</b>	<b>2.6</b>	<b>2.6</b>	<b>2.6</b>	<b>2.2</b>

= Significant difference from 2003



# PAVED ROAD BIKING: DEMOGRAPHIC PROFILE TRENDS

The last four years reflect an upward trend in the proportion of road bikers living in the West.

## Demographic Profile

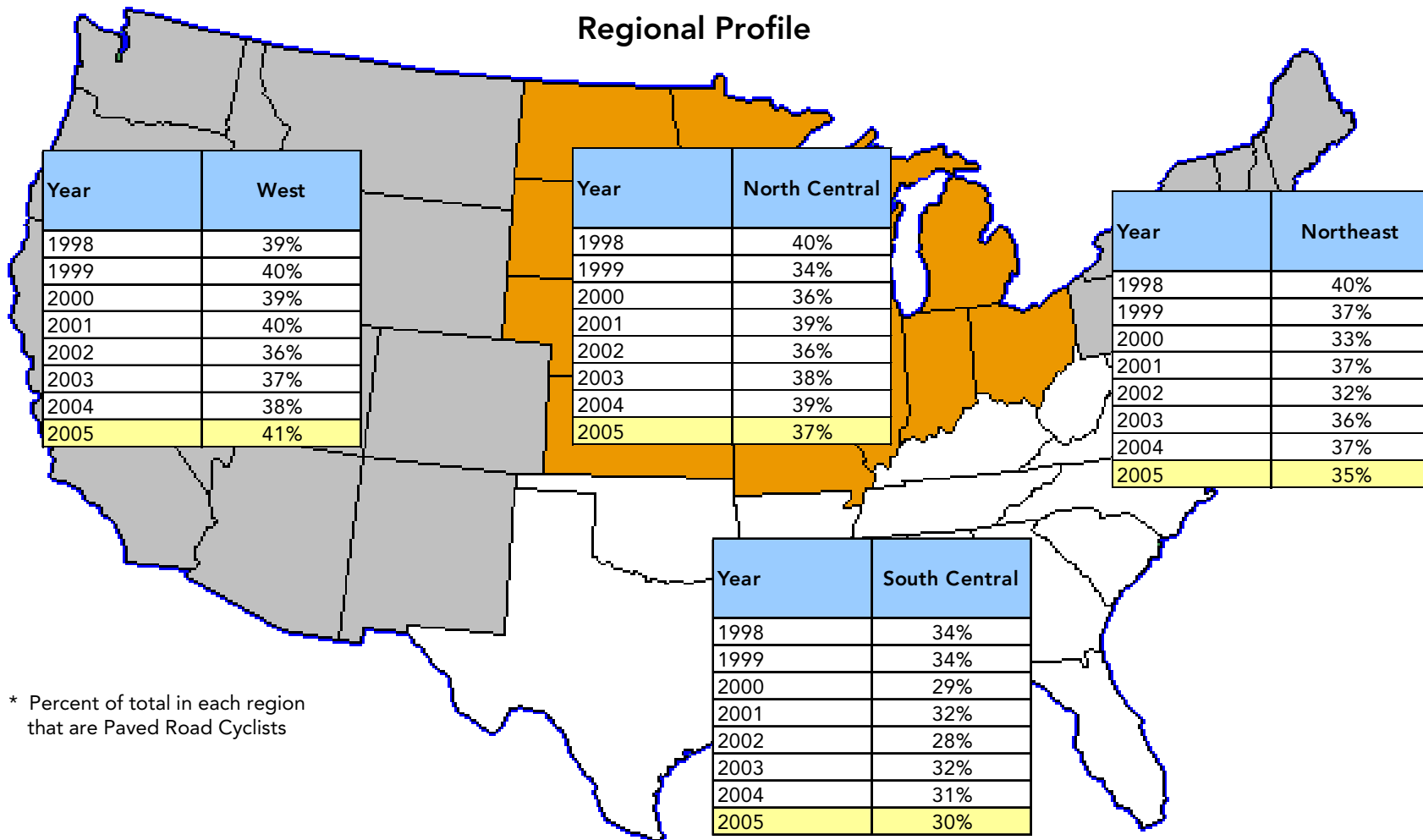
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	50%	52%	54%	53%	55%	56%	57%	58%
Female	50%	48%	46%	47%	45%	44%	43%	42%
<b>Age</b>								
16 to 24	26%	23%	29%	29%	30%	29%	30%	29%
25 to 34	20%	22%	22%	24%	22%	21%	20%	21%
35 to 44	27%	26%	23%	22%	21%	22%	21%	24%
45+	27%	28%	26%	25%	27%	27%	28%	27%
<b>Marital Status</b>								
Married	52%	52%	50%	45%	49%	49%	49%	53%
Unmarried	48%	47%	50%	55%	50%	51%	51%	47%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	79%	77%	76%
African-American	N/A	N/A	N/A	N/A	N/A	8%	9%	8%
Hispanic	N/A	N/A	N/A	N/A	N/A	10%	11%	12%
Asian	N/A	N/A	N/A	N/A	N/A	3%	1%	2%
<b>Children &lt;18</b>								
Yes	50%	51%	53%	47%	48%	55%	55%	55%
<b>Household Income</b>								
<\$40k	N/A	40%	40%	39%	34%	35%	33%	31%
\$40k - \$79k	N/A	48%	48%	43%	40%	41%	41%	40%
\$80k+	N/A	13%	12%	18%	26%	24%	27%	29%
<b>Region</b>								
Northeast	22%	17%	13%	20%	19%	19%	20%	19%
South Central	32%	34%	32%	30%	30%	32%	31%	30%
North Central	26%	22%	26%	23%	27%	25%	25%	24%
West	20%	27%	29%	27%	24%	24%	25%	28%

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

# PAVED ROAD BIKING: WHERE PARTICIPANTS LIVE\*

The Western region has the greatest proportion of paved road bikers among the population. Forty-one percent of Westerners are paved road bikers compared to 35% of the population nationally. The South Central region has the smallest proportion of road bikers among its population (30%).

## Regional Profile



\* Percent of total in each region that are Paved Road Cyclists

# PAVED ROAD BIKING: CROSSOVER ACTIVITY TRENDS

Other activities that paved road biking Participants are most likely to also participate in during 2005 include hiking, camping (car) and fishing (non-fly).

## Crossover Activities

Activities	Paved Road in 2003	Paved Road In 2004	Paved Road in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	9%	10%	10%	7,729,367
<b>Bicycling (Any Type)</b>	100%	100%	100%	78,472,919
Bicycling (Paved Road)	100%	100%	100%	78,472,919
<b>Bicycling (Mountain)</b>	56%	56%	55%	42,938,633
Bicycling (Single Track)	44%	44%	43%	33,939,678
Bicycling (Dirt Road)	44%	45%	43%	33,880,793
Bird Watching	8%	8%	8%	6,092,913
<b>Camping (Any Type)</b>	43%	41%	43%	34,051,720
Camping (Away from Car)	11%	13%	12%	9,545,652
Camping (Car)	34%	29%	32%	25,097,553
Canoeing	15%	17%	14%	10,889,883
<b>Climbing (Any Type)</b>	7%	5%	7%	5,781,145
Climbing (Artificial Wall)	5%	4%	5%	4,308,660
Climbing (Natural Rock)	3%	3%	4%	2,974,301
Climbing (Ice)	0%	1%	1%	458,066
Cross-Country/Nordic Skiing	7%	7%	8%	6,079,617
<b>Fishing (Any Type)</b>	N/A	45%	41%	32,552,428
Fishing (Fly)	8%	10%	9%	6,922,801
Fishing (Non-Fly)	N/A	43%	40%	31,121,126
Hiking	49%	51%	52%	40,568,254
<b>Kayaking (Any Type)</b>	8%	8%	9%	6,956,529
<b>Kayaking (Non-Whitewater)</b>	8%	7%	9%	6,748,117
Kayaking (Sit-On-Top)	6%	6%	7%	5,203,015
Kayaking (Tour/Sea)	5%	5%	4%	3,270,169
Kayaking (Whitewater)	2%	1%	2%	1,336,660
<b>Paddle sports (Any Type)</b>	24%	23%	22%	17,651,465
Rafting	9%	7%	8%	6,017,750
Snowshoeing	4%	3%	4%	3,345,375
Telemark Skiing	4%	3%	2%	1,955,328
Trail Running	28%	30%	29%	22,728,022

OUTDOOR RECREATION PARTICIPATION STUDY  
**CAMPING – CAR, AWAY FROM CAR**

**“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: 68.1 MILLION PARTICIPANTS, 365 MILLION OUTINGS

## THE 2005 AMERICAN CAMPER

- Primarily male
- Participation among all age groups (mean age of 35)
- Geographically dispersed with a higher proportion living in the West and North Central regions of the U.S.
- Staying active by also participating in fishing (non-fly), bicycling (paved road) and hiking
- Went on five outings On average in 2005
- Almost one-third of participants went on a single outing in 2005

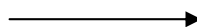
## MAJOR TRENDS IN CAMPING

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

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

### Year 2005 Events of Note

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



### Observation/Implication

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

## CAMPING: SUB-ACTIVITIES

**CAMPING AWAY FROM CAR: 17.7 MILLION PARTICIPANTS, 106 MILLION OUTINGS**  
**CAR CAMPING: 51.7 MILLION PARTICIPANTS, 259 MILLION OUTINGS**

### THE 2005 AMERICAN AWAY FROM CAR CAMPER

- Primarily male
- Young (16 to 34)
- Unmarried
- Likely to share the experience with friends
- Likely to live in the South Central or Western region
- Averaged six outings a year
- Few (13%) away from car campers also went car camping

### THE 2005 AMERICAN CAR CAMPER

- Relatively gender balanced slightly favoring males
- Participation among all age groups
- Most likely camping with family
- Likely to live in the Western region of the U.S.
- Averaged five outings a year
- Very few (4%) of car campers also went camping away from the car

### MAJOR TRENDS IN CAMPING AWAY FROM CAR

Participation in camping away from the car has remained relatively consistent over the past six years with around 17 million Americans 16 and older participating.

- Gender: Males outnumber females in this activity nearly 2.5 to one.
- Ethnicity: Over three-quarters of 2005 away from car campers are Caucasian. Participation among African Americans is low, but on the rise (8%).

### MAJOR TRENDS IN CAR CAMPING

Participation in car camping has fluctuated over the past eight years, but holds strong in 2005.

- Ethnicity: Over four-fifths of 2005 car campers are Caucasian. Hispanics comprise 11% of Participants.
- Region: Most car campers live in the Western region of the U.S., with a recent increase in participants from the West.

#### Year 2005 Event of Note:

This is a different activity than car camping with very little crossover. The activity is predominantly young, unmarried and male. The focus is on friends.

#### Observation/Implication

Increase participation in the young adult market.

#### Year 2005 Event of Note:

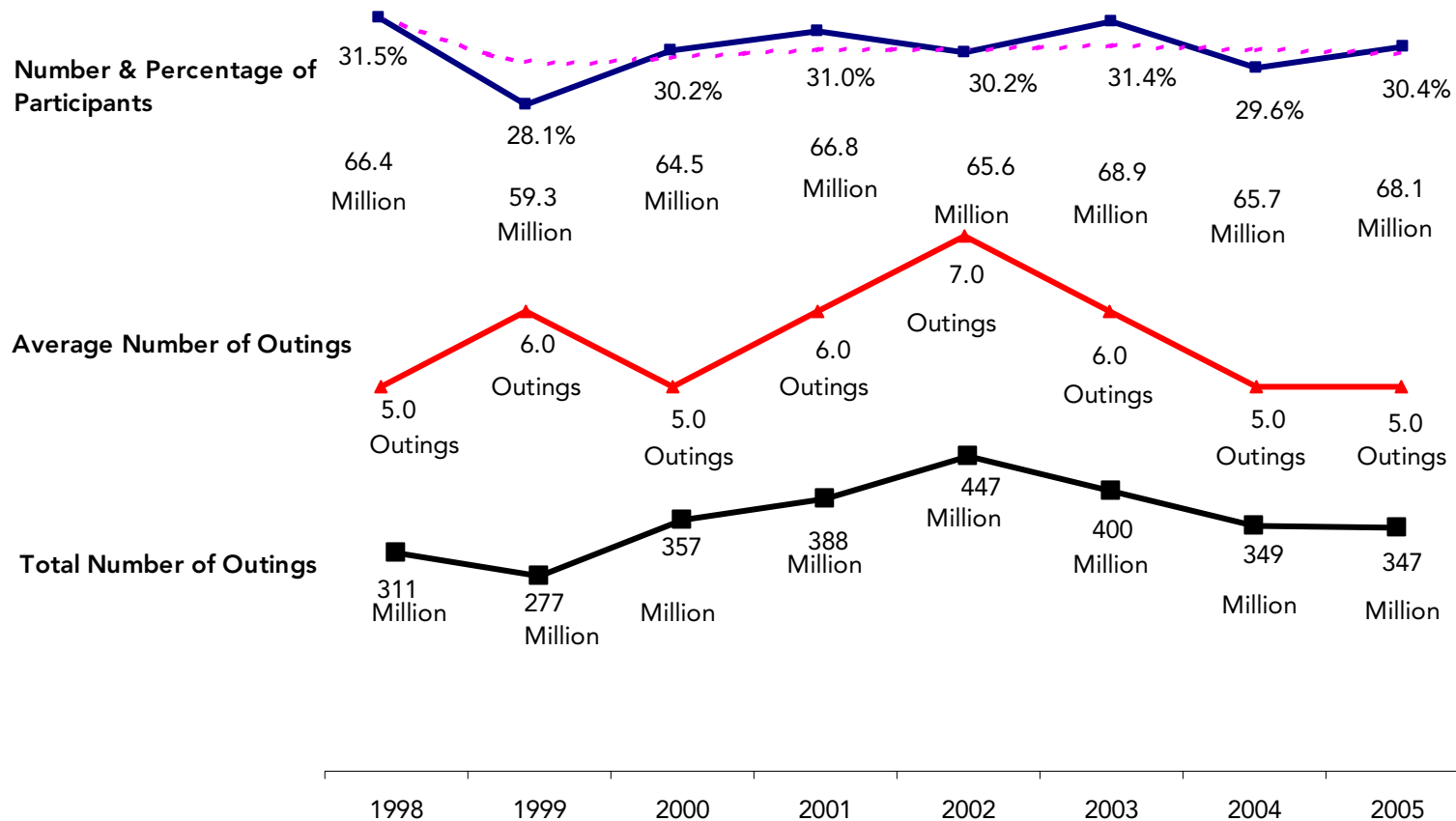
Car camping is a family activity.

#### Observation/Implication

Car camping is an American family tradition. With 259 million outings in 2005, this activity proves a perfect way to bring a busy family together.

# CAMPING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

With the exception of a brief decline in 1999, camping has been a consistently popular activity among Americans 16 and older with an average of 65.7 million Participants over the past eight years. During this time, the number of total outings peaked in 2002 when the average number of outings equaled seven—pushing the total number of outings to 459 million.



\*Total Outings are calculated by summing Camping Away From Car and Car Camping outings.

..... Rolling Trend Average

# CAMPING: FREQUENCY OF PARTICIPATION

During 2005 camping Participants averaged five outings—yielding a one-year increase of nearly 13 million total outings (341 million in 2005) from the previous year (328 million).

Historically, about 80% of camping Participants go on one to six outings per year. 2005 saw a significant increase over 2003 in the proportion of one-time campers and a significant decrease over 2003 in the proportion of campers making 11 or more outings.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	31%	26%	33%	30%	30%	29%	32%	33%
2 times	19%	23%	18%	18%	22%	23%	20%	22%
3 to 6 times	32%	33%	33%	35%	32%	32%	34%	33%
7 to 10 times	7%	8%	5%	6%	7%	8%	6%	6%
<b>11 or more times (NET)</b>	<b>11%</b>	<b>10%</b>	<b>11%</b>	<b>10%</b>	<b>10%</b>	<b>9%</b>	<b>9%</b>	<b>7%</b>
11 to 30 times	9%	9%	10%	8%	7%	7%	7%	5%
31 or more times	2%	2%	1%	2%	2%	2%	2%	1%
<b>Average Frequency</b>	<b>5.0</b>	<b>6.0</b>	<b>5.0</b>	<b>6.0</b>	<b>7.0</b>	<b>6.0</b>	<b>5.0</b>	<b>5.0</b>
<b>Total Outings (Millions)</b>	<b>311</b>	<b>277</b>	<b>357</b>	<b>388</b>	<b>447</b>	<b>400</b>	<b>349</b>	<b>347</b>

\*Total Outings are calculated by summing Camping Away From Car and Car Camping outings.   = Significant difference from 2003



# CAMPING: DEMOGRAPHIC PROFILE TRENDS

The 2005 camping Participant population is comprised primarily of male Americans across all age groups. Historically, only slightly more males participate in camping than females; however, 2005 saw a significant increase in the proportion of male Participants. The 2005 camper is also more affluent and more likely to live in the Western region of the U.S. compared to 2003 campers.

## Demographic Profile

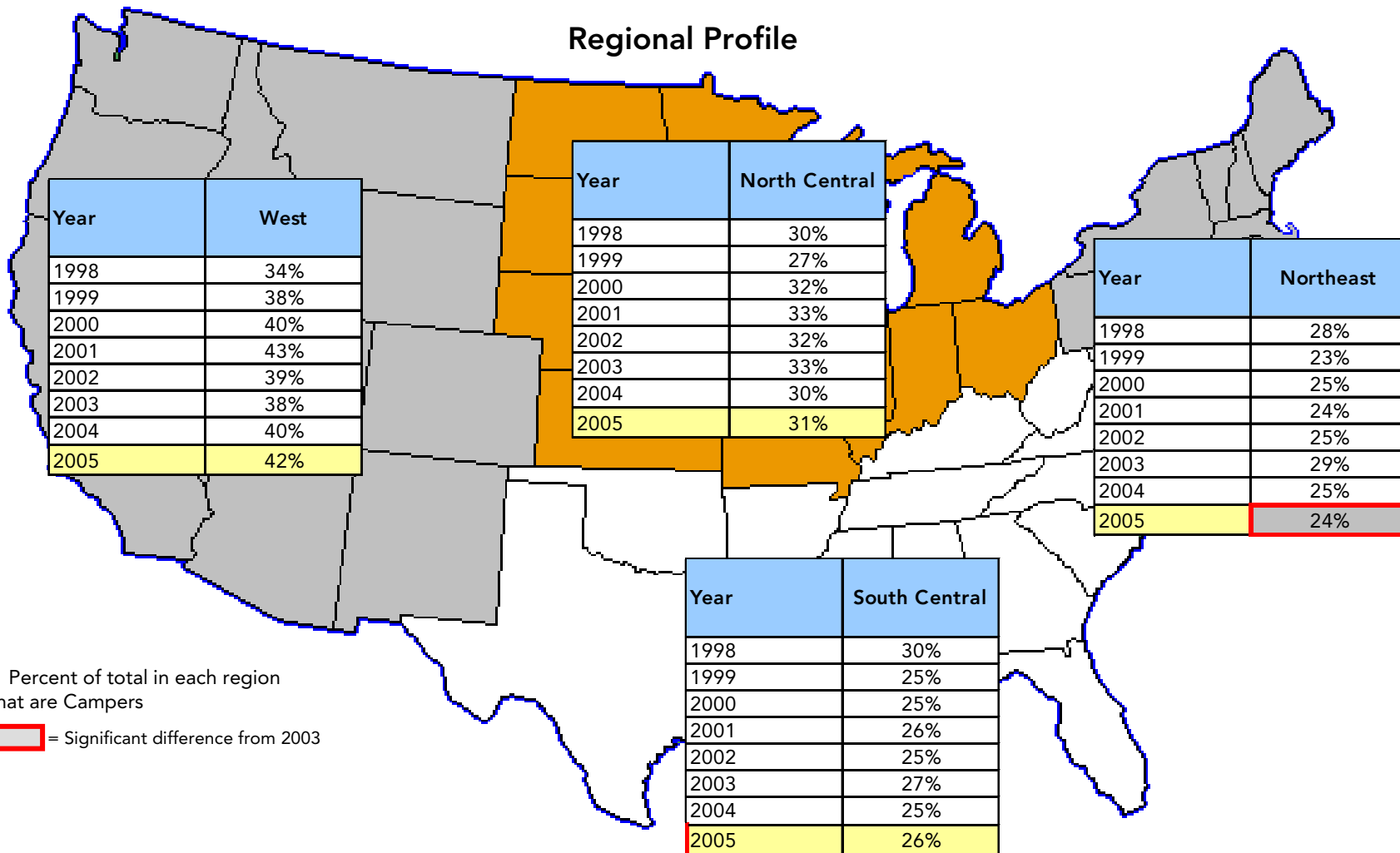
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	53%	57%	53%	56%	56%	57%	59%	62%
Female	47%	43%	47%	44%	44%	43%	41%	38%
<b>Age</b>								
16 to 24	26%	24%	30%	31%	30%	31%	34%	32%
25 to 34	22%	22%	22%	24%	21%	22%	23%	22%
35 to 44	22%	24%	22%	21%	22%	20%	20%	21%
45+	29%	29%	27%	25%	27%	27%	24%	24%
<b>Marital Status</b>								
Married	52%	53%	49%	46%	49%	48%	48%	52%
Unmarried	48%	47%	51%	54%	50%	51%	52%	48%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	85%	84%	82%
African-American	N/A	N/A	N/A	N/A	N/A	3%	4%	5%
Hispanic	N/A	N/A	N/A	N/A	N/A	7%	11%	10%
Asian	N/A	N/A	N/A	N/A	N/A	2%	1%	1%
Other	N/A	N/A	N/A	N/A	N/A	4%	6%	6%
<b>Children &lt;18</b>								
Yes	48%	50%	52%	47%	48%	53%	53%	55%
<b>Household Income</b>								
<\$40k	N/A	44%	45%	43%	39%	39%	39%	34%
\$40k - \$79k	N/A	46%	47%	44%	41%	41%	39%	41%
\$80k+	N/A	10%	8%	13%	20%	20%	22%	26%
<b>Region</b>								
Northeast	16%	14%	11%	15%	16%	18%	16%	15%
South Central	30%	32%	30%	29%	29%	30%	30%	29%
North Central	25%	22%	26%	22%	27%	24%	22%	23%
West	29%	33%	33%	34%	29%	28%	32%	33%

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

# CAMPING: WHERE PARTICIPANTS LIVE\*

The Western region of the U.S. has the greatest percentage of campers among the U.S. population. More than four in ten Westerners are campers compared to three in ten among the national population. The Northeast region has the smallest percentage of campers, and it is a significant drop compared to 2003.

### Regional Profile



# CAMPING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Other activities that camping Participants are most likely to also have participated in during 2005 include fishing (non-fly), bicycling (paved road) and hiking.

## Crossover Activities

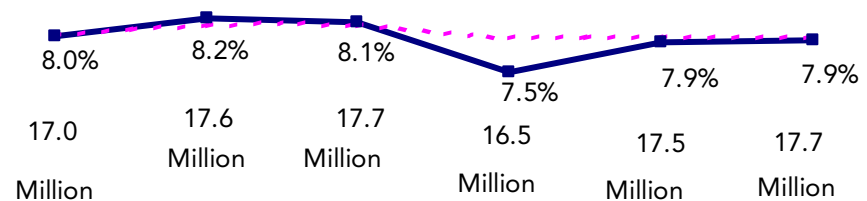
Activities	Camping in 2003	Camping In 2004	Camping in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	15%	16%	16%	10,590,813
<b>Bicycling (Any Type)</b>	55%	55%	55%	37,344,486
Bicycling (Paved Road)	49%	50%	50%	34,061,054
<b>Bicycling (Mountain)</b>	37%	38%	36%	24,830,142
Bicycling (Single Track)	29%	31%	29%	19,945,992
Bicycling (Dirt Road)	30%	30%	28%	19,264,422
Bird Watching	11%	8%	9%	6,243,764
<b>Camping (Any Type)</b>	100%	100%	100%	68,129,935
Camping (Away from Car)	24%	27%	26%	17,729,607
Camping (Car)	77%	74%	76%	51,761,600
Canoeing	23%	22%	21%	13,966,728
<b>Climbing (Any Type)</b>	8%	8%	9%	5,879,929
Climbing (Artificial Wall)	6%	5%	6%	3,780,522
Climbing (Natural Rock)	5%	5%	6%	3,798,724
Climbing (Ice)	1%	1%	1%	607,212
Cross-Country/Nordic Skiing	8%	8%	8%	5,571,499
<b>Fishing (Any Type)</b>	N/A	60%	57%	39,028,950
Fishing (Fly)	11%	15%	13%	8,712,695
Fishing (Non-Fly)	N/A	57%	55%	37,248,897
Hiking	56%	59%	59%	40,077,933
<b>Kayaking (Any Type)</b>	8%	9%	10%	6,834,347
<b>Kayaking (Non-Whitewater)</b>	8%	8%	9%	6,354,543
Kayaking (Sit-On-Top)	6%	7%	7%	4,803,963
Kayaking (Tour/Sea)	4%	5%	4%	2,881,365
Kayaking (Whitewater)	2%	2%	2%	1,369,730
<b>Paddle sports (Any Type)</b>	31%	30%	32%	21,625,497
Rafting	10%	10%	11%	7,346,427
Snowshoeing	5%	4%	4%	2,777,286
Telemark Skiing	4%	3%	3%	2,180,931
Trail Running	26%	29%	31%	21,204,661

  = Significant difference from 2003

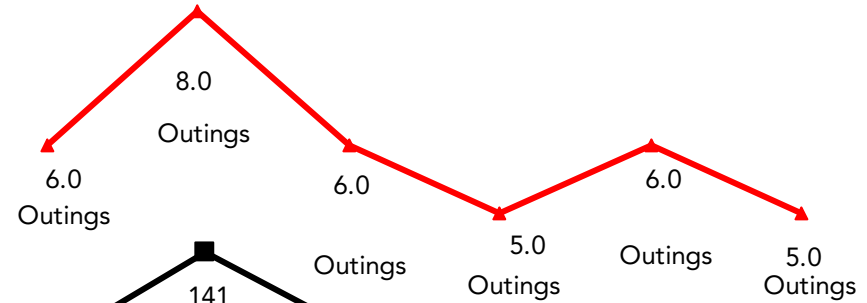
# CAMPING AWAY FROM CAR\*: PARTICIPATION & FREQUENCY'S IMPACT ON TOTAL OUTINGS

Participation in camping away from the car has remained consistent over the past six years with around 17 million Americans 16 and older participating. With the exception of a peak in 2001 of an average of nine outings per participant, the average number of outings has also remained consistent at about six. Since participation has remained relatively constant, total outings has fluctuated evenly with the average number of outings.

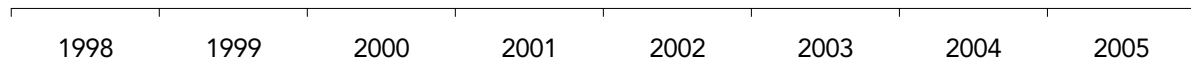
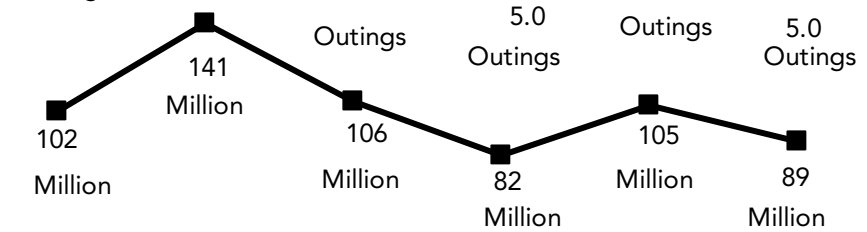
Number & Percentage of Participants



Average Number of Outings



Total Number of Outings



..... Rolling Trend Average

\*Camping away from Car not asked in 1998

# CAMPING AWAY FROM CAR: FREQUENCY OF PARTICIPATION

During 2005 camping away from car Participants averaged six outings, an even amount to 2004. About 80% of camping away from car Participants go on one to six outings per year. Historically, a little over one-quarter of these Participants only go on one outing per year; during 2005 this proportion increased to one-third (33%).

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	N/A	N/A	31%	23%	25%	24%	29%	33%
2 times	N/A	N/A	15%	20%	23%	25%	19%	24%
3 to 6 times	N/A	N/A	34%	38%	37%	36%	36%	32%
7 to 10 times	N/A	N/A	2%	5%	7%	9%	7%	6%
11 or more times (NET)	N/A	N/A	18%	14%	8%	7%	10%	4%
11 to 30	N/A	N/A	18%	11%	6%	6%	7%	3%
31 or more times	N/A	N/A	0%	4%	3%	1%	3%	2%
<b>Average Frequency</b>	<b>0.0</b>	<b>0.0</b>	<b>6.0</b>	<b>8.0</b>	<b>6.0</b>	<b>5.0</b>	<b>6.0</b>	<b>5.0</b>
<b>Total Outings (Millions)</b>	<b>0</b>	<b>0</b>	<b>102</b>	<b>141</b>	<b>106</b>	<b>82</b>	<b>105</b>	<b>89</b>

  = Significant difference from 2003

# CAMPING AWAY FROM CAR: DEMOGRAPHIC PROFILE TRENDS

The 2005 camping away from car Participant population is comprised primarily of younger, unmarried and male Americans. Nearly three-quarters of Participants (72%) are male, nearly two-thirds (63%) are unmarried, and over two-thirds (68%) are between the ages of 16 and 34 years old. The 2005 away from car camper is also more affluent than 2003 away from car campers and they are more likely to live in the South Central or Western regions of the U.S.

## Demographic Profile

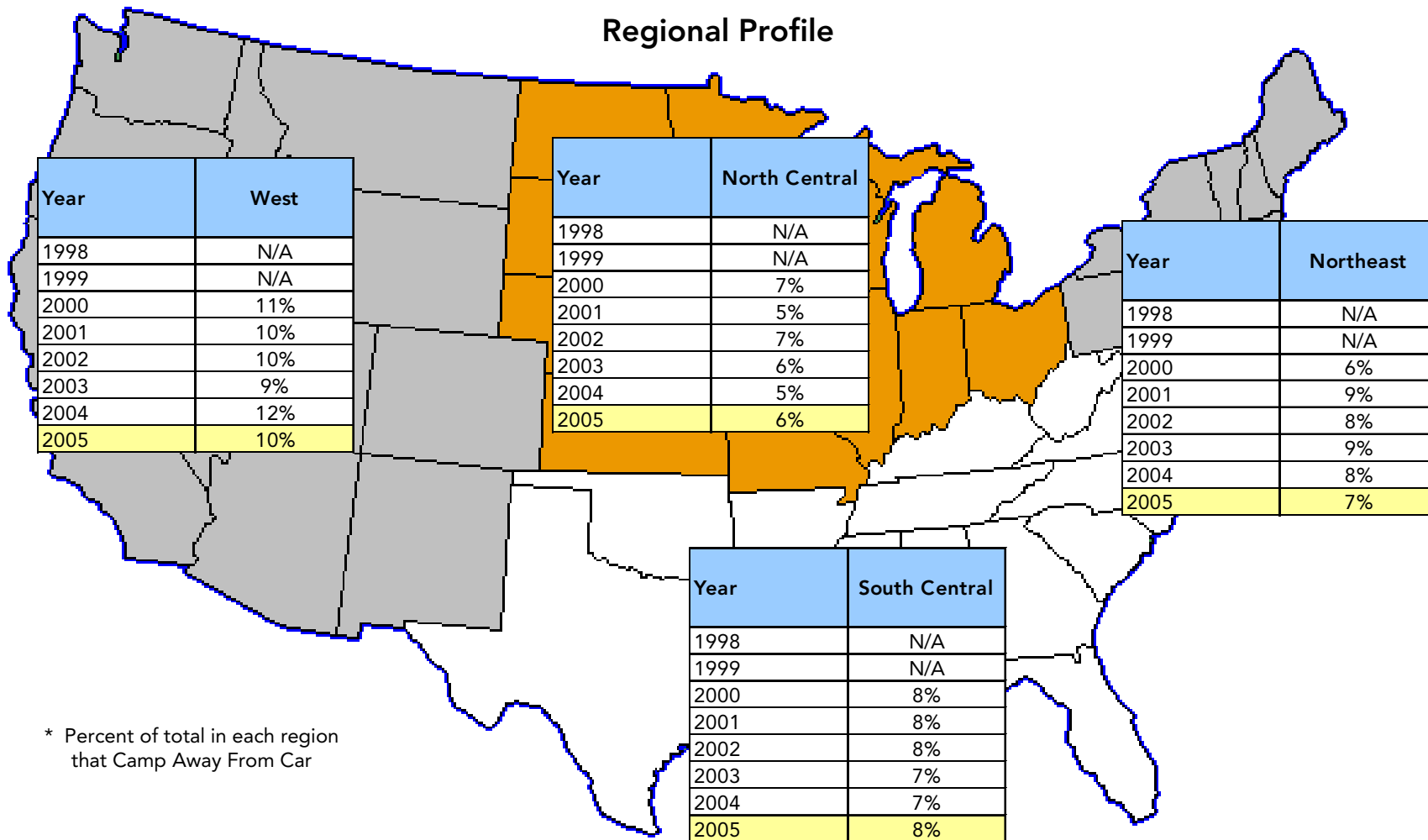
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	N/A	N/A	63%	66%	66%	71%	74%	72%
Female	N/A	N/A	37%	34%	34%	29%	26%	28%
<b>Age</b>								
16 to 24	N/A	N/A	42%	39%	43%	45%	46%	46%
25 to 34	N/A	N/A	23%	25%	17%	25%	22%	22%
35 to 44	N/A	N/A	16%	16%	16%	13%	16%	17%
45+	N/A	N/A	19%	20%	24%	18%	16%	15%
<b>Marital Status</b>								
Married	N/A	N/A	34%	35%	37%	34%	32%	37%
Unmarried	N/A	N/A	66%	65%	63%	65%	68%	63%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	79%	76%	78%
African-American	N/A	N/A	N/A	N/A	N/A	4%	6%	8%
Hispanic	N/A	N/A	N/A	N/A	N/A	11%	15%	8%
Asian	N/A	N/A	N/A	N/A	N/A	3%	2%	1%
Asian	NA	NA	NA	NA	NA	6%	7%	7%
<b>Children &lt;18</b>								
Yes	N/A	N/A	51%	39%	45%	48%	50%	51%
<b>Household Income</b>								
<\$40k	N/A	N/A	52%	48%	38%	38%	38%	29%
\$40k - \$79k	N/A	N/A	43%	39%	39%	40%	42%	40%
\$80k+	N/A	N/A	5%	13%	22%	22%	21%	31%
<b>Region</b>								
Northeast	N/A	N/A	11%	21%	19%	21%	19%	17%
South Central	N/A	N/A	35%	35%	34%	31%	29%	34%
North Central	N/A	N/A	22%	14%	21%	19%	15%	18%
West	N/A	N/A	33%	30%	26%	29%	36%	31%

\*Ethnicity: Will not add to 100%, see page 239 for details. 8% = Significant difference from 2003

# CAMPING AWAY FROM CAR: WHERE PARTICIPANTS LIVE\*

The Western region of the U.S. has the greatest percentage of away from car campers among the U.S. population. One in ten Westerners are away from car campers compared to 8% of the national population. The North Central region has the smallest percentage of away from car campers.

## Regional Profile



\* Percent of total in each region that Camp Away From Car

# CAMPING AWAY FROM CAR: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Other activities that away from car camping Participants are most likely to also have participated in during 2005 include hiking, bicycling (any type) and fishing (non-fly). 2005 away from car camping Participants are significantly more likely to also trail run compared to 2003.

## Crossover Activities

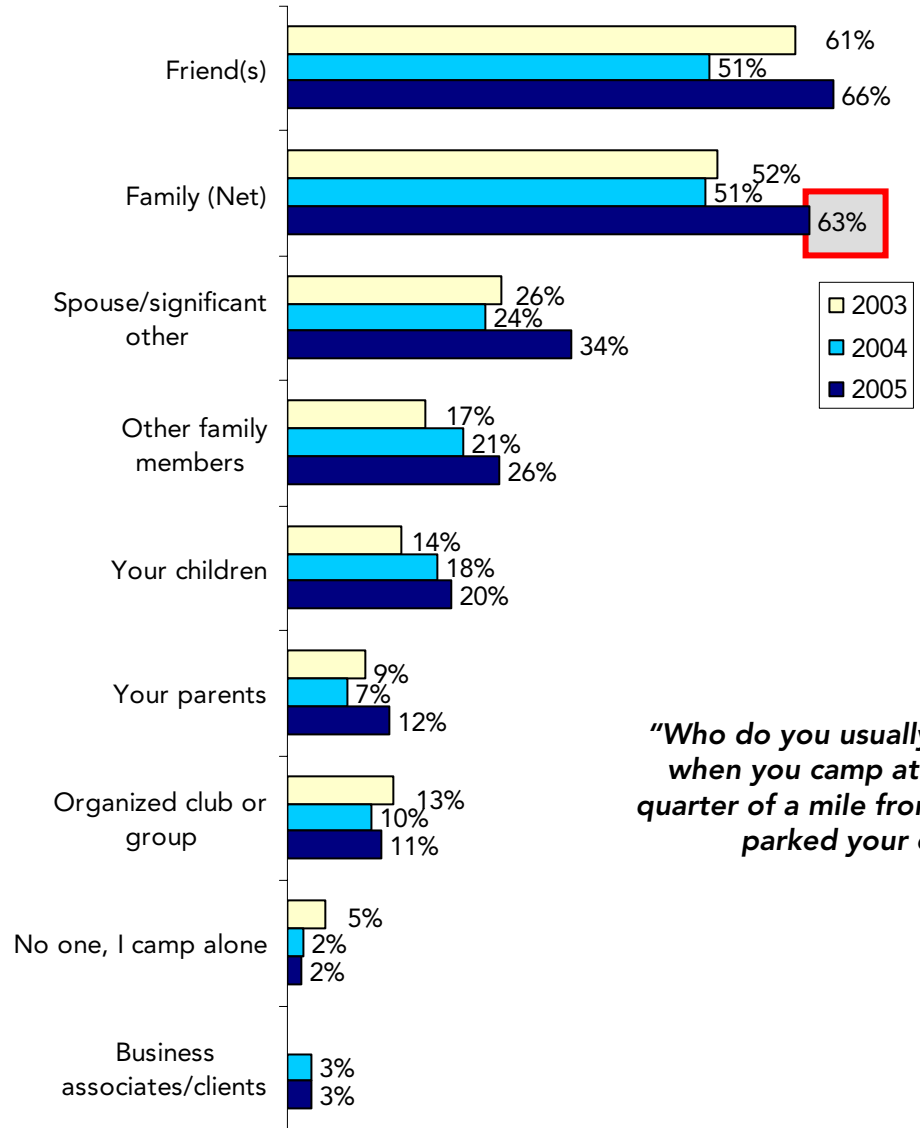
Activities	Camping Away From Car in 2003	Camping Away From Car In 2004	Camping Away From Car in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	47%	44%	42%	7,469,724
<b>Bicycling (Any Type)</b>	59%	63%	61%	10,835,359
Bicycling (Paved Road)	50%	57%	54%	9,545,652
<b>Bicycling (Mountain)</b>	47%	52%	49%	8,602,530
Bicycling (Single Track)	40%	46%	41%	7,308,844
Bicycling (Dirt Road)	40%	42%	37%	6,501,393
Bird Watching	13%	9%	11%	1,884,877
<b>Camping (Any Type)</b>	100%	100%	100%	17,724,749
Camping (Away from Car)	100%	100%	100%	17,724,749
Camping (Car)	7%	8%	13%	2,307,008
Canoeing	33%	29%	28%	4,925,767
<b>Climbing (Any Type)</b>	19%	15%	16%	2,795,704
Climbing (Artificial Wall)	14%	10%	10%	1,772,162
Climbing (Natural Rock)	13%	12%	12%	2,050,245
Climbing (Ice)	2%	2%	2%	404,057
Cross-Country/Nordic Skiing	13%	13%	11%	1,954,347
<b>Fishing (Any Type)</b>	N/A	68%	62%	11,026,039
Fishing (Fly)	18%	24%	21%	3,719,642
Fishing (Non-Fly)	N/A	65%	57%	10,075,279
Hiking	73%	74%	69%	12,301,181
<b>Kayaking (Any Type)</b>	18%	16%	17%	3,013,618
<b>Kayaking (Non-Whitewater)</b>	16%	14%	16%	2,853,264
Kayaking (Sit-On-Top)	12%	10%	13%	2,313,629
Kayaking (Tour/Sea)	9%	9%	8%	1,385,821
Kayaking (Whitewater)	3%	6%	4%	780,219
<b>Paddle sports (Any Type)</b>	44%	43%	44%	7,852,346
Rafting	18%	16%	17%	3,067,252
Snowshoeing	9%	8%	7%	1,270,600
Telemark Skiing	7%	3%	6%	1,060,103
Trail Running	39%	42%	48%	8,520,049

= Significant difference from 2003



# CAMPING AWAY FROM CAR: CAMPING PARTY \*

Those who camped away from the car in 2005 typically went with friends.



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

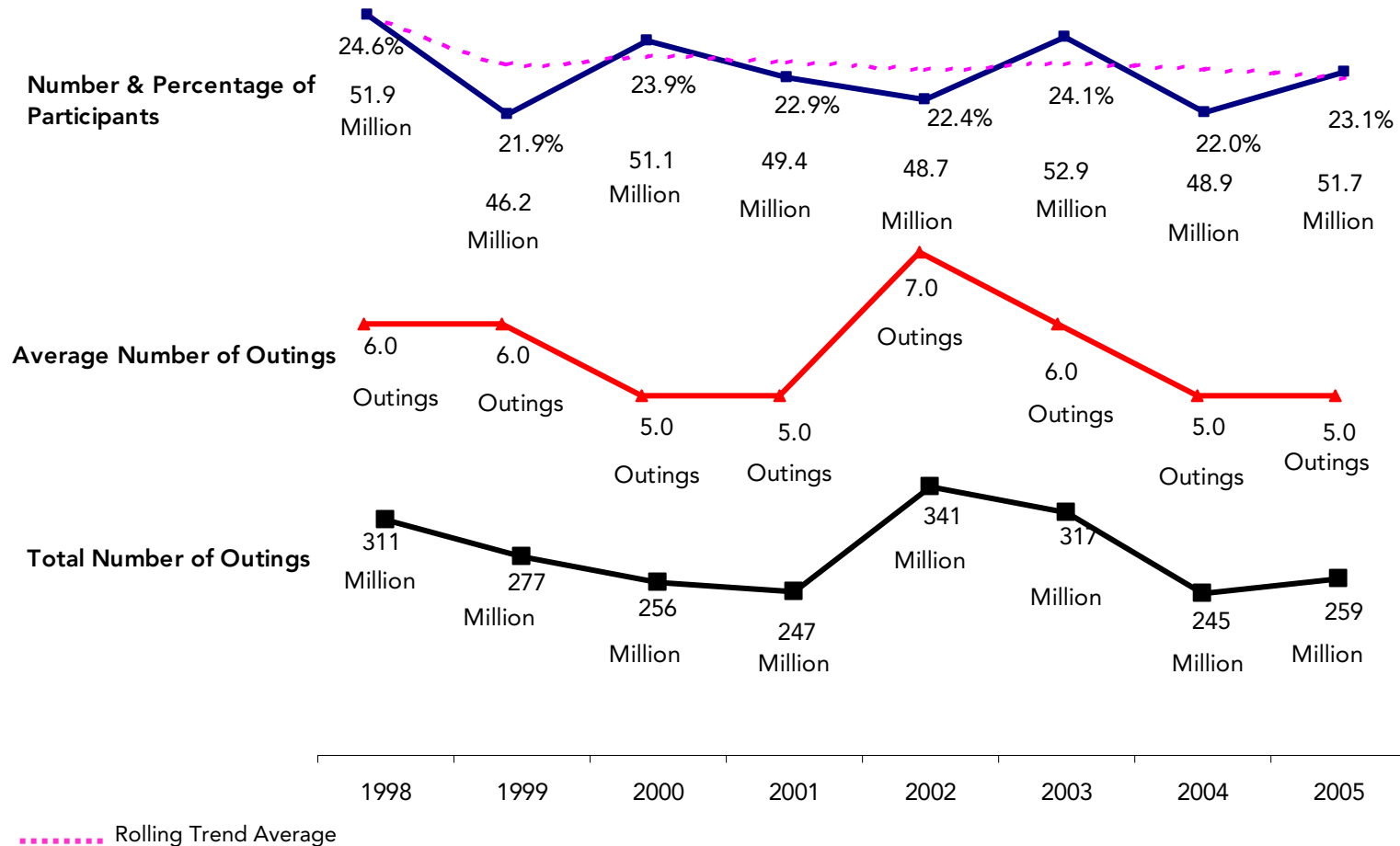
\* Percentages based on Americans who camped away from car.

= Significant difference from 2003

# CAR CAMPING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

Participation in car camping has fluctuated over the past eight years. It peaked in 2003 with 52.9 million Americans age 16 and older participating. Participation dropped by 4 million in 2004, but worked to recover that loss in 2005 with a gain of 2.8 million Participants.

The average number of outings by car campers has fluctuated over the past eight years between five and seven per Participant. Total outings has mirrored this fluctuation.



# CAR CAMPING: FREQUENCY OF PARTICIPATION

During 2005 car camping Participants averaged five outings—yielding a one-year increase of 14 million total outings (259 million in 2005) from the previous year (245 million).

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	27%	26%	33%	33%	31%	31%	34%	33%
2 times	21%	23%	19%	18%	22%	23%	19%	22%
3 to 6 times	32%	33%	32%	35%	31%	30%	34%	31%
7 to 10 times	8%	8%	6%	6%	6%	7%	6%	6%
11 or more times (NET)	12%	10%	9%	8%	10%	9%	8%	7%
11 to 30	10%	9%	8%	7%	7%	8%	6%	5%
31 or more times	3%	2%	1%	1%	2%	2%	1%	1%
<b>Average Frequency</b>	<b>6.0</b>	<b>6.0</b>	<b>5.0</b>	<b>5.0</b>	<b>7.0</b>	<b>6.0</b>	<b>5.0</b>	<b>5.0</b>
<b>Total Outings (Millions)</b>	<b>311</b>	<b>277</b>	<b>256</b>	<b>247</b>	<b>341</b>	<b>317</b>	<b>245</b>	<b>259</b>

# CAR CAMPING: DEMOGRAPHIC PROFILE TRENDS

The 2005 car camping Participant population is comprised of a relatively even split of males to females (slightly favoring males) across all age groups. The last three years reflect an upward trend in the proportion of Hispanics participating in car camping and Participants who live in the Western region of the U.S.

## Demographic Profile

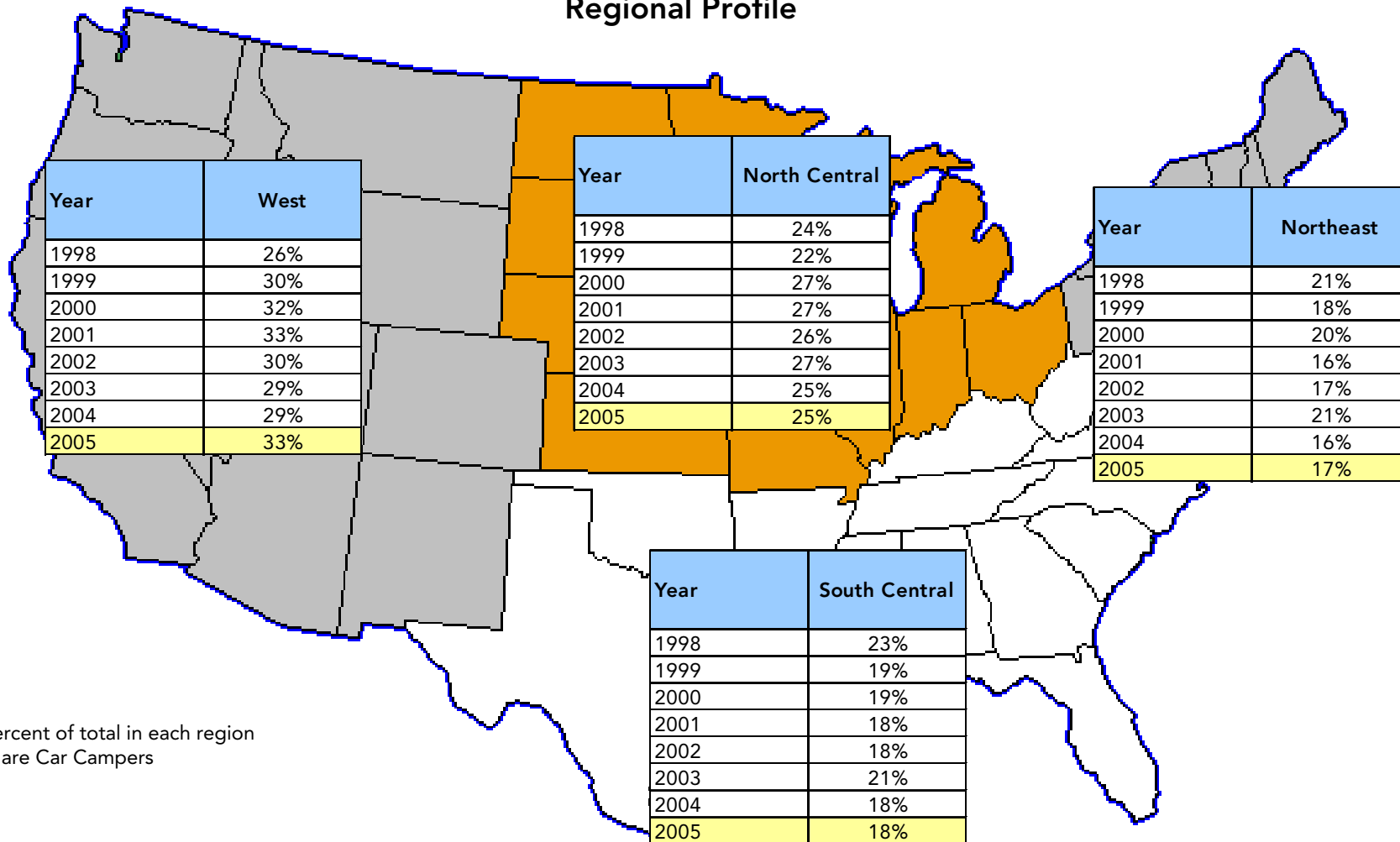
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	48%	55%	51%	53%	54%	54%	55%	58%
Female	52%	45%	49%	47%	46%	46%	45%	42%
<b>Age</b>								
16 to 24	22%	22%	26%	28%	25%	26%	29%	27%
25 to 34	23%	20%	23%	23%	22%	22%	24%	23%
35 to 44	23%	26%	23%	22%	24%	22%	21%	23%
45+	33%	32%	28%	26%	29%	29%	27%	27%
<b>Marital Status</b>								
Married	57%	56%	54%	50%	54%	53%	54%	56%
Unmarried	43%	43%	46%	50%	45%	47%	46%	43%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	88%	87%	84%
African-American	N/A	N/A	N/A	N/A	N/A	3%	3%	4%
Hispanic	N/A	N/A	N/A	N/A	N/A	6%	9%	11%
Asian	N/A	N/A	N/A	N/A	N/A	2%	1%	1%
Other	N/A	N/A	N/A	N/A	N/A	4%	5%	6%
<b>Children &lt;18</b>								
Yes	49%	51%	52%	50%	49%	55%	54%	56%
<b>Household Income</b>								
<\$40k	N/A	43%	41%	41%	39%	39%	39%	35%
\$40k - \$79k	N/A	48%	50%	46%	42%	41%	39%	42%
\$80k+	N/A	9%	9%	13%	19%	19%	22%	23%
<b>Region</b>								
Northeast	15%	14%	11%	13%	15%	16%	14%	14%
South Central	30%	30%	29%	27%	27%	30%	29%	28%
North Central	27%	23%	27%	25%	29%	26%	25%	24%
West	28%	33%	32%	35%	29%	28%	31%	34%

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

# CAR CAMPING: WHERE PARTICIPANTS LIVE\*

The Western region has the greatest proportion of car campers among the population. One-third (33%) of Westerners are car campers compared to 23% of the population nationally. The Northeast region has the smallest proportion of car campers among its population (17%).

## Regional Profile



\* Percent of total in each region that are Car Campers

# CAR CAMPING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Other activities that car camping Participants are most likely to also have participated in during 2005 include hiking, fishing (non-fly) and bicycling (paved road).

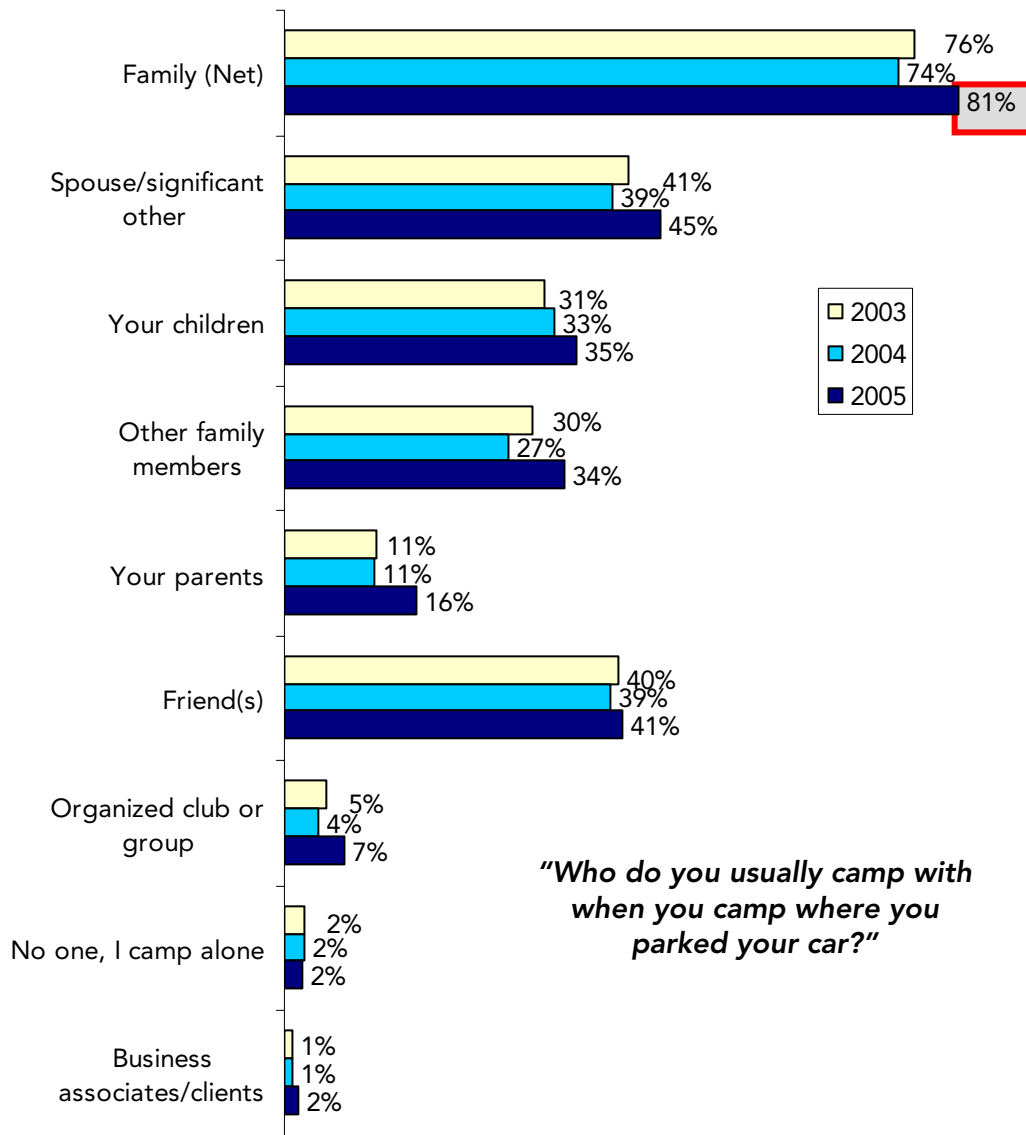
## Crossover Activities

Activities	Car Camping in 2003	Car Camping In 2004	Car Camping in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	6%	6%	8%	4,240,103
<b>Bicycling (Any Type)</b>	55%	52%	53%	27,262,691
Bicycling (Paved Road)	49%	47%	49%	25,097,553
<b>Bicycling (Mountain)</b>	35%	33%	33%	16,851,809
Bicycling (Single Track)	26%	26%	26%	13,214,627
Bicycling (Dirt Road)	27%	26%	26%	13,237,471
Bird Watching	10%	8%	9%	4,750,715
<b>Camping (Any Type)</b>	100%	100%	100%	51,747,416
Camping (Away from Car)	2%	3%	4%	2,307,008
Camping (Car)	100%	100%	100%	51,747,416
Canoeing	20%	19%	19%	9,839,865
<b>Climbing (Any Type)</b>	5%	5%	6%	3,256,318
Climbing (Artificial Wall)	4%	4%	4%	2,148,907
Climbing (Natural Rock)	2%	3%	4%	1,859,736
Climbing (Ice)	0%	0%	1%	319,848
Cross-Country/Nordic Skiing	7%	6%	7%	3,828,599
<b>Fishing (Any Type)</b>	N/A	57%	57%	29,244,433
Fishing (Fly)	9%	12%	10%	5,392,991
Fishing (Non-Fly)	N/A	55%	54%	28,120,504
Hiking	52%	55%	56%	29,094,747
<b>Kayaking (Any Type)</b>	6%	6%	8%	4,371,892
<b>Kayaking (Non-Whitewater)</b>	5%	6%	8%	4,052,574
Kayaking (Sit-On-Top)	4%	5%	6%	2,993,997
Kayaking (Tour/Sea)	3%	4%	3%	1,684,395
Kayaking (Whitewater)	1%	1%	2%	780,219
<b>Paddle sports (Any Type)</b>	27%	26%	29%	14,961,195
Rafting	9%	8%	9%	4,626,295
Snowshoeing	4%	2%	3%	1,722,549
Telemark Skiing	4%	3%	2%	1,223,740
Trail Running	22%	24%	27%	13,779,156

= Significant difference from 2003

# CAR CAMPING: CAMPING PARTY\*

In 2005 car camping remains a family-friendly activity—and family participation is on the rise. More than four out of five car campers went with family members, a significant increase over 2003 (76%).



*“Who do you usually camp with when you camp where you parked your car?”*

\* Percentages based on Americans who car camped.

= Significant difference from 2003

OUTDOOR RECREATION PARTICIPATION STUDY  
**CANOEING**

*"Have you gone canoeing?"*



# CANOEING: 20.8 MILLION PARTICIPANTS, 83 MILLION OUTINGS

## THE 2005 AMERICAN CANOEING PARTICIPANT

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

## MAJOR TRENDS IN CANOEING

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

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

### Year 2005 Events of Note

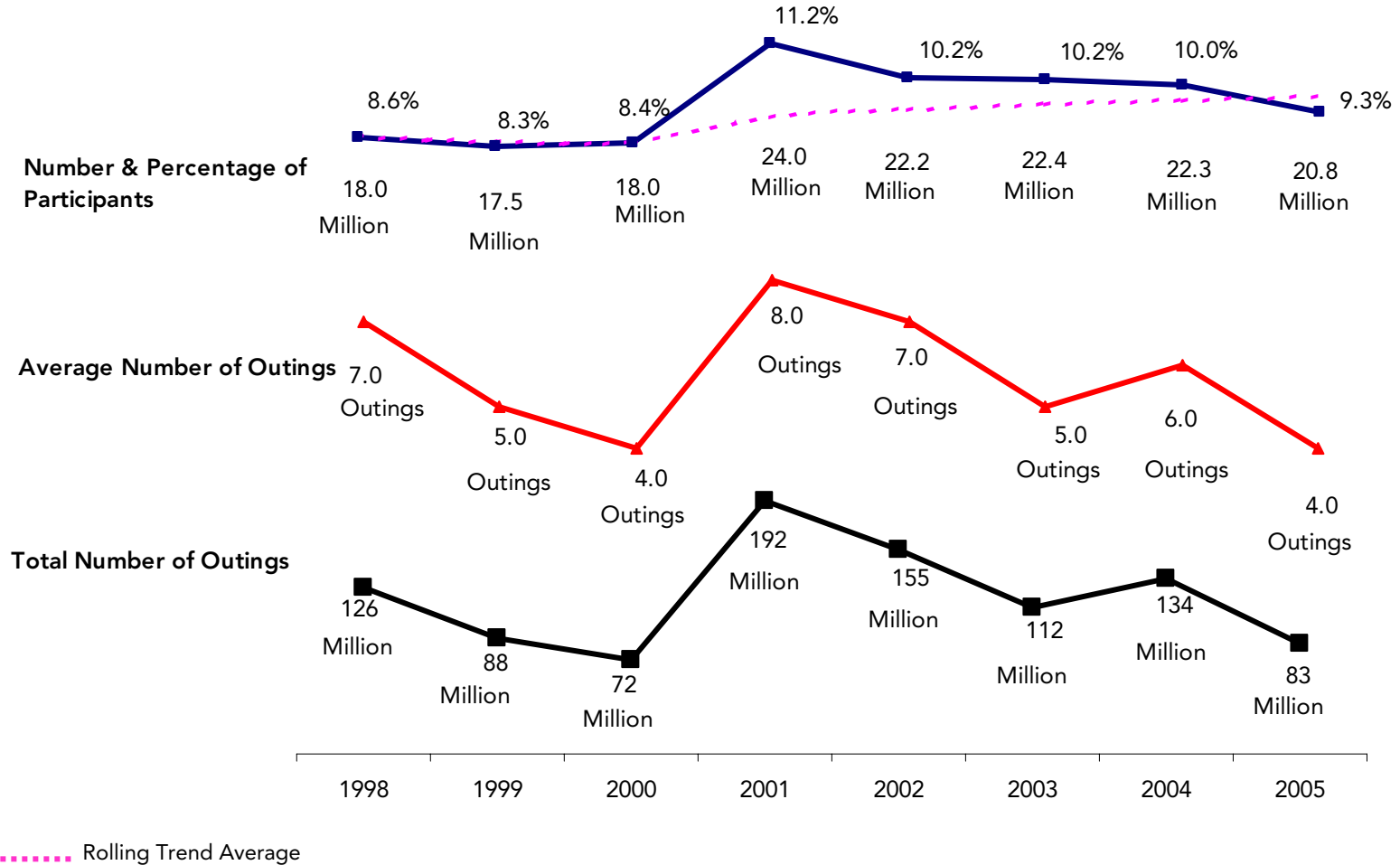
Declining frequency in canoeing is driving fewer total outings. A greater number of Hispanics are entering the sport.

### Observation/Implication

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

# CANOEING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

Over the past eight years, the number of Americans 16 and older who participate in canoeing has remained constant, but average frequency levels have declined since the highs measured in 2001 and 2002. Total canoeing outings in 2005 reached it's lowest level at 83 million since 2000 when only 72 million outings were reported.



# CANOEING FREQUENCY OF PARTICIPATION

The average number of times that Americans 16 and older went canoeing in 2005 was 4 outings. In total canoers generated 83 million outings in 2005; down 51 million outings from the previous year and down significantly from the record number of outings taken in 2001 and 2002.

Almost one in four Americans (38%) went on only one canoeing outing in 2005.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	36%	35%	39%	35%	34%	36%	37%	38%
2 times	23%	21%	29%	24%	26%	23%	24%	20%
3 to 6 times	24%	30%	21%	25%	26%	29%	24%	28%
7 to 10 times	4%	4%	6%	7%	5%	4%	6%	7%
11 or more times (NET)	13%	9%	5%	9%	10%	9%	9%	7%
11 to 30	9%	8%	4%	4%	7%	7%	7%	6%
31 or more times	3%	1%	0%	5%	3%	1%	2%	1%
<b>Average Frequency</b>	<b>7.0</b>	<b>5.0</b>	<b>4.0</b>	<b>8.0</b>	<b>7.0</b>	<b>5.0</b>	<b>6.0</b>	<b>4.0</b>
<b>Total Outings (Millions)</b>	<b>126</b>	<b>88</b>	<b>72</b>	<b>192</b>	<b>155</b>	<b>112</b>	<b>134</b>	<b>83</b>

# CANOEING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

Almost two-thirds (62%) of canoeing participants are male. Over half are married (56%) and over the age of 35 (54%), with a mean age of 37.

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

## Demographic Profile

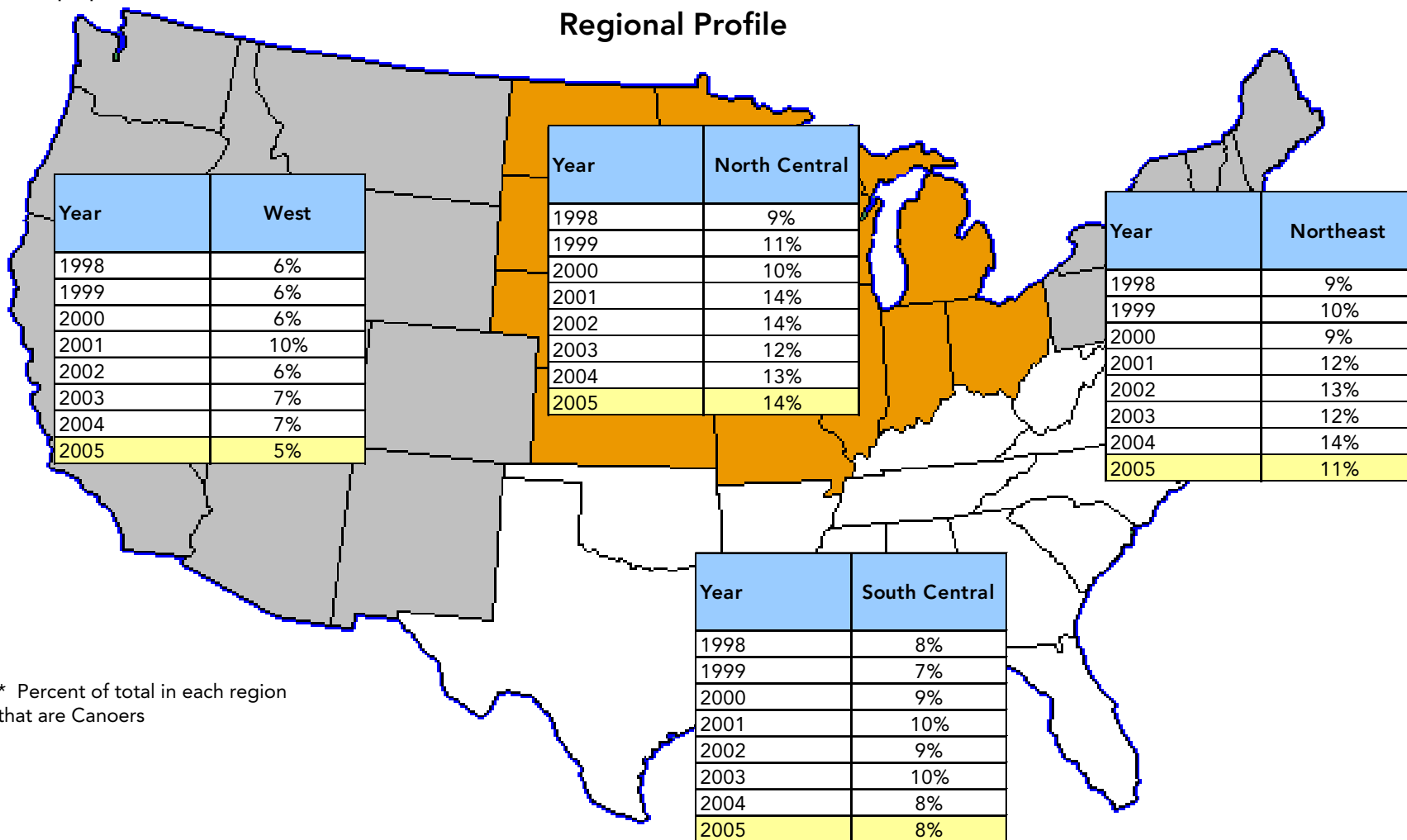
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	55%	55%	53%	55%	58%	62%	61%	62%
Female	45%	45%	47%	45%	42%	38%	39%	38%
<b>Age</b>								
16 to 24	29%	29%	23%	29%	28%	32%	31%	26%
25 to 34	19%	25%	20%	22%	23%	21%	20%	19%
35 to 44	25%	23%	29%	24%	21%	19%	20%	25%
45+	27%	23%	27%	24%	28%	28%	28%	29%
<b>Marital Status</b>								
Married	48%	54%	50%	44%	47%	49%	51%	56%
Unmarried	52%	46%	50%	56%	52%	50%	49%	44%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	93%	86%	85%
African-American	N/A	N/A	N/A	N/A	N/A	2%	3%	4%
Hispanic	N/A	N/A	N/A	N/A	N/A	4%	8%	7%
Asian	N/A	N/A	N/A	N/A	N/A	2%	1%	2%
Other	N/A	N/A	N/A	N/A	N/A	2%	5%	7%
<b>Children &lt;18</b>								
Yes	46%	48%	56%	43%	49%	53%	51%	52%
<b>Household Income</b>								
<\$40k	N/A	33%	31%	35%	26%	33%	31%	26%
\$40k - \$79k	N/A	54%	54%	47%	43%	41%	37%	39%
\$80k+	N/A	13%	15%	19%	31%	26%	32%	36%
<b>Region</b>								
Northeast	26%	20%	14%	21%	24%	23%	27%	23%
South Central	31%	32%	38%	31%	29%	33%	28%	31%
North Central	33%	29%	30%	26%	34%	28%	28%	33%
West	10%	19%	18%	22%	14%	16%	17%	14%

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

# CANOEING: WHERE PARTICIPANTS LIVE\*

The North Central and Northeast regions have the greatest percentage of canoers among their populations. Fourteen percent of those living in the North Central region and 11% of those living in the Northeast region are canoers. The Western region of the United States sees the smallest number of canoers (5%) among its population.

## Regional Profile



\* Percent of total in each region that are Canoers

# CANOEING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Camping, hiking, fishing and bicycling are the activities that canoers are most likely to have also participated in during 2005.

## Crossover Activities

Activities	Canoeing in 2003	Canoeing In 2004	Canoeing in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	18%	17%	17%	3,547,912
<b>Bicycling (Any Type)</b>	61%	64%	59%	12,286,129
Bicycling (Paved Road)	54%	59%	52%	10,889,883
<b>Bicycling (Mountain)</b>	42%	47%	40%	8,354,971
Bicycling (Single Track)	32%	37%	33%	6,838,897
Bicycling (Dirt Road)	34%	40%	31%	6,534,785
Bird Watching	13%	13%	15%	3,168,382
<b>Camping (Any Type)</b>	70%	64%	67%	13,962,900
Camping (Away from Car)	24%	23%	24%	4,925,767
Camping (Car)	48%	42%	47%	9,839,865
<b>Canoeing</b>	100%	100%	100%	20,817,288
<b>Climbing (Any Type)</b>	12%	13%	9%	1,862,377
Climbing (Artificial Wall)	9%	10%	7%	1,358,841
Climbing (Natural Rock)	7%	9%	4%	847,578
Climbing (Ice)	0%	1%	1%	263,865
Cross-Country/Nordic Skiing	12%	13%	12%	2,570,631
<b>Fishing (Any Type)</b>	N/A	63%	62%	13,002,232
Fishing (Fly)	16%	19%	16%	3,374,448
Fishing (Non-Fly)	N/A	59%	59%	12,206,404
Hiking	71%	74%	67%	13,877,125
<b>Kayaking (Any Type)</b>	21%	25%	25%	5,163,100
<b>Kayaking (Non-Whitewater)</b>	19%	24%	23%	4,738,880
Kayaking (Sit-On-Top)	14%	18%	19%	3,859,970
Kayaking (Tour/Sea)	10%	13%	9%	1,838,498
Kayaking (Whitewater)	4%	5%	6%	1,260,709
<b>Paddle sports (Any Type)</b>	100%	100%	100%	20,817,288
Rafting	23%	18%	19%	3,902,924
Snowshoeing	10%	8%	8%	1,605,568
Telemark Skiing	5%	4%	3%	675,553
Trail Running	32%	39%	34%	7,095,911

OUTDOOR RECREATION PARTICIPATION STUDY  
**CROSS-COUNTRY/NORDIC SKIING**

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

# CROSS-COUNTRY/NORDIC: 10 MILLION PARTICIPANTS, 50 MILLION OUTINGS

## THE 2005 AMERICAN CROSS-COUNTRY/NORDIC SKIER

- Well represented among males and females, married and unmarried. with a variety of income levels
- Mean age of 35 years
- Most likely to live in the Northeastern United States
- Active in a variety of other outdoor activities including bicycling, camping, fishing, hiking, trail running and paddle sports
- Hit the trails, on average, five times during 2005
- Approximately half limit activity to only one or two outings during the year

## MAJOR TRENDS IN CROSS-COUNTRY/NORDIC SKIING

Participation over the last three years is similar to levels seen from 1998 through 2000. Total number of outings has also leveled off over the past three years with 50 million total outings taken in 2005—well below the record levels seen in 2001 and 2002, with 45 million fewer outings in 2005 than in 2002.

- Age: Trend results indicate that a greater percentage of cross-country/Nordic skiers are younger Americans (16 to 24) compared to 2003. Over one-third (36%) of cross-country/Nordic skiers are between the ages of 16 and 24 in 2005 compared to only a quarter in 2003.
- Children in Household: Approximately half of all cross-country/Nordic skiers have children under the age of 18 in their household. This trend has held since 2002. Prior to this time, only a third to four in ten cross-country/Nordic skiers had children under the age of 18 in their household.

Note: A revision made to the description of cross-country/Nordic skiing in 2001 may have impacted trend results for this category.

A revision made to the description of Telemark skiing in 2003 may have impacted the trend results for this category.

### Year 2005 Events of Note

America's young adults are discovering cross-country/Nordic skiing; a third of today's cross-country Nordic skiers are 16 to 24 years old.

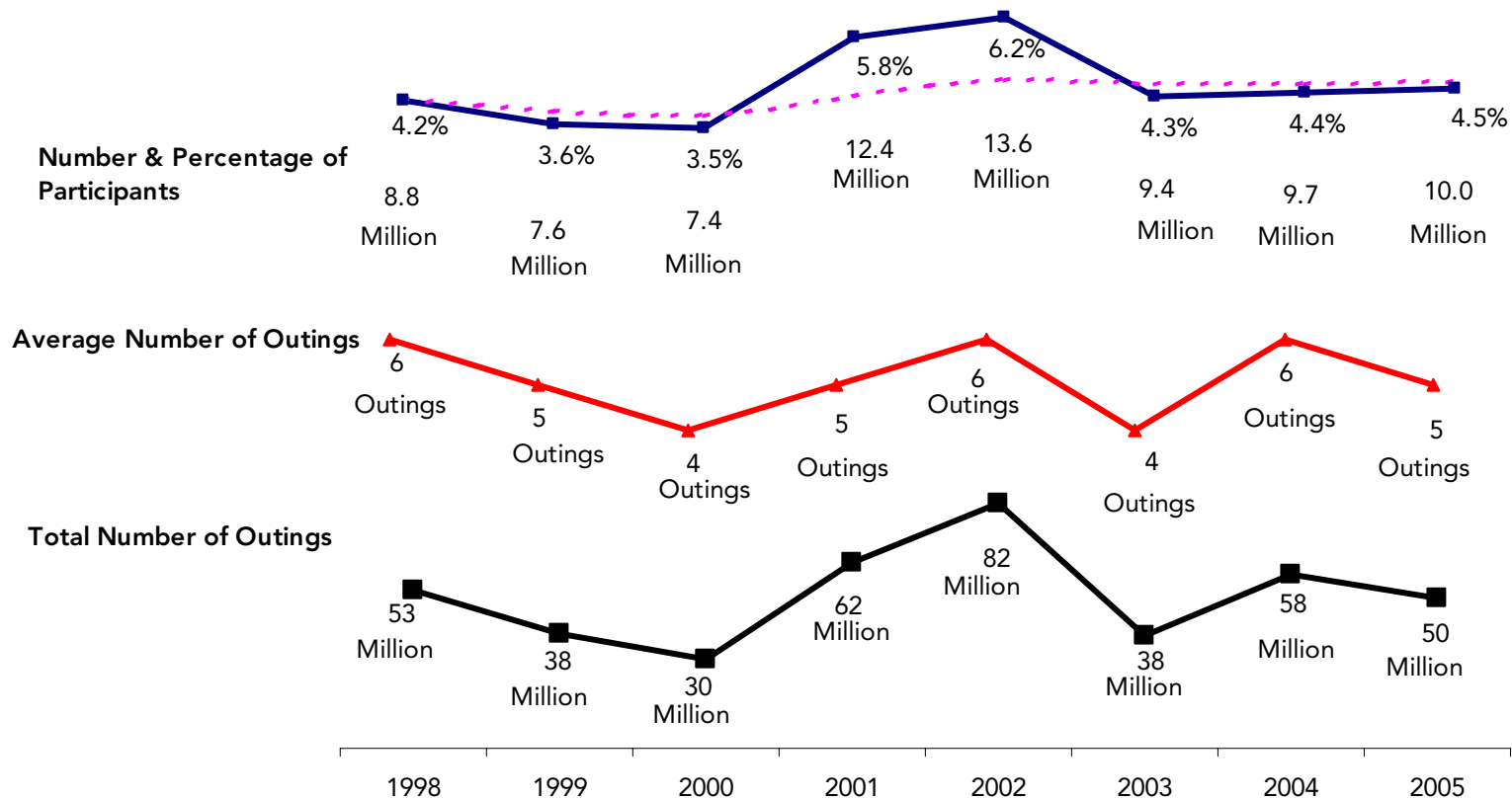
### Observation/Implication

Don't miss a chance to grow participation in the sport by focusing on younger Americans.



# CROSS-COUNTRY/NORDIC SKIING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

In the past three years participation in cross-country/Nordic skiing has remained stable and is similar to levels seen in 1998 through 2000. Total number of outings has also leveled off over the past three years with 50 million total outings taken in 2005—well below the record levels seen in 2001 and 2002. In 2005 there were 45 million fewer outings than in 2002.



..... Rolling Trend Average

# CROSS-COUNTRY/NORDIC SKIING FREQUENCY OF PARTICIPATION

During 2005, cross-country/Nordic skiing Participants averaged five outings—yielding a one year decline of 8 million in total outings (50 million in 2005) from the previous year (58 million).

Approximately half (51%) of cross-country/Nordic skiing Participants in 2005 only hit the trails one or two times this year.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	15%	25%	27%	29%	27%	24%	33%	29%
2 times	26%	21%	25%	19%	16%	22%	15%	22%
3 to 6 times	38%	35%	35%	29%	38%	37%	34%	31%
7 to 10 times	8%	10%	6%	10%	8%	9%	8%	6%
11 or more times	13%	10%	7%	13%	10%	9%	9%	12%
<b>Average Frequency</b>	<b>6.0</b>	<b>5.0</b>	<b>4.0</b>	<b>5.0</b>	<b>6.0</b>	<b>4.0</b>	<b>6.0</b>	<b>5.0</b>
<b>Total Outings (Millions)</b>	<b>53</b>	<b>38</b>	<b>30</b>	<b>62</b>	<b>82</b>	<b>38</b>	<b>58</b>	<b>50</b>

# CROSS-COUNTRY/NORDIC SKIING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

Cross-country/Nordic skier participants are only slightly more likely to be male (56%) than female (44%). During 2005, a greater percentage of younger Americans (16 to 24) were participants compared to 2003. Over one-third (36%) of cross-country/Nordic skiers were between the ages of 16 and 24 compared to only a quarter in 2003. The greatest age decline is seen in the 25 to 34 year old group.

## Demographic Profile

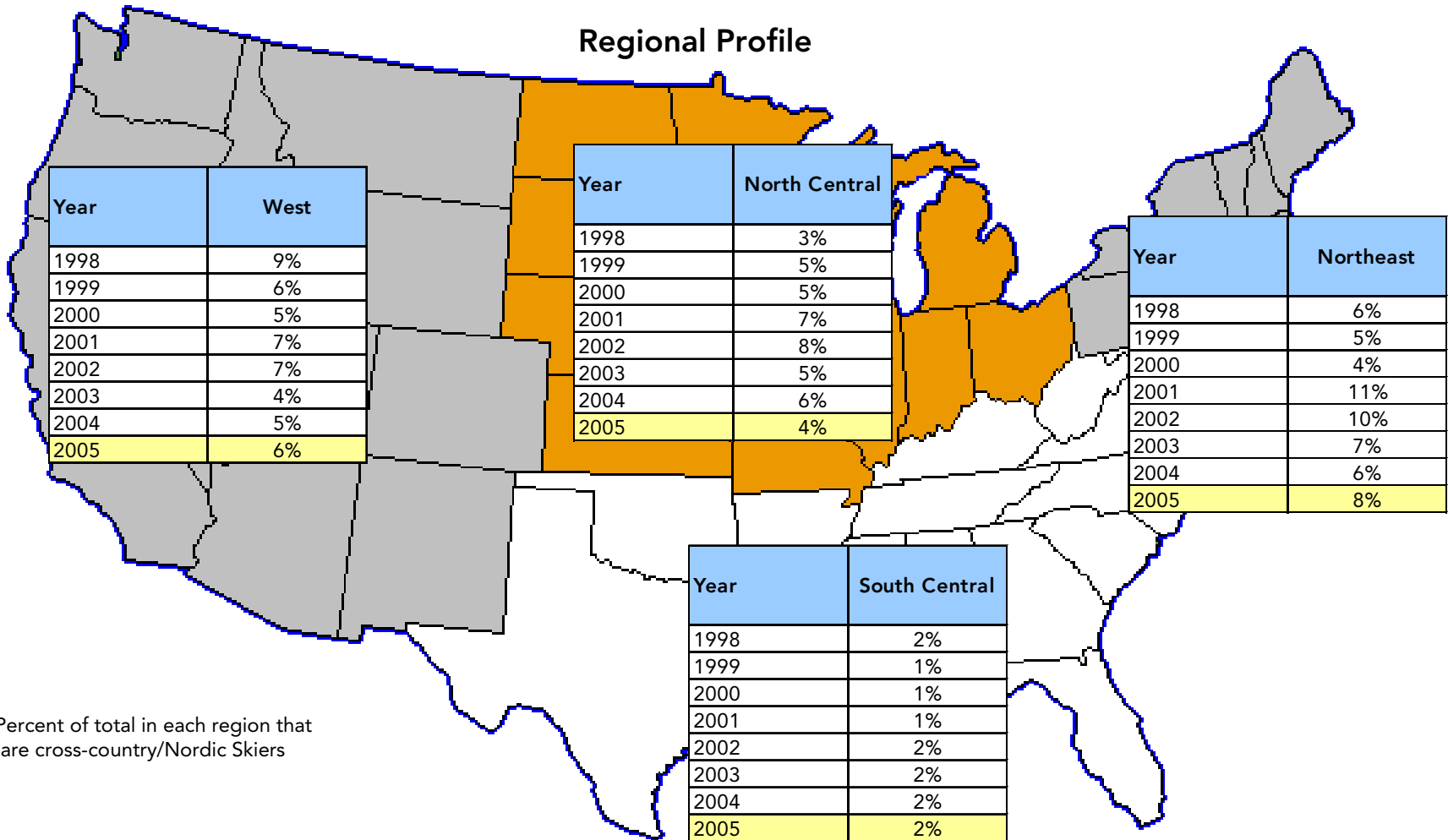
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	48%	50%	55%	55%	54%	57%	53%	56%
Female	52%	50%	45%	45%	46%	43%	47%	44%
<b>Age</b>								
16 to 24	30%	20%	29%	28%	28%	24%	24%	36%
25 to 34	11%	17%	16%	23%	18%	25%	25%	15%
35 to 44	21%	25%	22%	22%	24%	20%	22%	23%
45+	38%	37%	32%	28%	30%	31%	29%	26%
<b>Marital Status</b>								
Married	46%	55%	43%	48%	51%	49%	45%	47%
Unmarried	54%	45%	56%	52%	49%	51%	55%	53%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	88%	87%	84%
African-American	N/A	N/A	N/A	N/A	N/A	3%	5%	3%
Hispanic	N/A	N/A	N/A	N/A	N/A	4%	9%	8%
Asian	N/A	N/A	N/A	N/A	N/A	2%	1%	2%
Other	N/A	N/A	N/A	N/A	N/A	6%	4%	7%
<b>Children &lt;18</b>								
Yes	41%	32%	44%	39%	45%	53%	51%	52%
<b>Household Income</b>								
<\$40k	N/A	34%	25%	29%	24%	30%	24%	36%
\$40k - \$79k	N/A	50%	60%	45%	40%	37%	41%	36%
\$80k+	N/A	16%	15%	27%	36%	33%	29%	40%
<b>Region</b>								
Northeast	29%	23%	17%	37%	32%	32%	25%	34%
South Central	14%	10%	13%	8%	13%	19%	16%	14%
North Central	17%	29%	38%	24%	30%	27%	30%	22%
West	40%	38%	32%	31%	25%	22%	29%	30%

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

# CROSS-COUNTRY/NORDIC SKIING: WHERE PARTICIPANTS LIVE\*

The Northeast region has the greatest percentage of cross-country/Nordic skiers (8%) among their population. The South Central region of the United States sees the smallest number of cross-country/Nordic skiers (2%) among its population.

## Regional Profile



\* Percent of total in each region that are cross-country/Nordic Skiers

# CROSS-COUNTRY/NORDIC SKIING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Cross-country/Nordic skiers participate in a variety of other outdoor sports including bicycling, camping, fishing, hiking, trail running and paddle sports.

## Crossover Activities

Activities	Cross-Country/ Nordic Skiers in 2003	Cross-Country/ Nordic Skiers In 2004	Cross-Country/ Nordic Skiers in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	19%	23%	18%	1,789,509
<b>Bicycling (Any Type)</b>	70%	63%	65%	6,489,626
Bicycling (Paved Road)	60%	54%	61%	6,079,617
<b>Bicycling (Mountain)</b>	51%	47%	53%	5,303,672
Bicycling (Single Track)	38%	37%	40%	4,037,540
Bicycling (Dirt Road)	40%	37%	41%	4,118,866
Bird Watching	14%	14%	12%	1,198,441
<b>Camping (Any Type)</b>	59%	51%	56%	5,569,972
Camping (Away from Car)	23%	23%	19%	1,954,347
Camping (Car)	38%	30%	38%	3,828,599
Canoeing	29%	29%	26%	2,570,631
<b>Climbing (Any Type)</b>	11%	11%	10%	983,208
Climbing (Artificial Wall)	8%	9%	7%	657,937
Climbing (Natural Rock)	6%	9%	6%	583,713
Climbing (Ice)	1%	3%	2%	170,868
<b>Cross-Country/Nordic Skiing</b>	100%	100%	100%	10,022,580
<b>Fishing (Any Type)</b>	N/A	52%	49%	4,912,506
Fishing (Fly)	21%	19%	15%	1,549,217
Fishing (Non-Fly)	N/A	48%	42%	4,199,779
Hiking	71%	72%	67%	6,686,699
<b>Kayaking (Any Type)</b>	16%	17%	18%	1,805,192
<b>Kayaking (Non-Whitewater)</b>	15%	15%	17%	1,725,015
Kayaking (Sit-On-Top)	12%	9%	14%	1,377,855
Kayaking (Tour/Sea)	8%	11%	10%	957,328
Kayaking (Whitewater)	4%	6%	3%	311,922
<b>Paddle sports (Any Type)</b>	41%	42%	44%	4,427,297
Rafting	13%	15%	17%	1,711,432
Snowshoeing	21%	16%	15%	1,499,186
Telemark Skiing	11%	10%	14%	1,420,616
Trail Running	44%	40%	45%	4,466,216

OUTDOOR RECREATION PARTICIPATION STUDY

# HIKING

*"Have you gone hiking on an unpaved trail?"*

# HIKING: 76.7 MILLION PARTICIPANTS, 844 MILLION OUTINGS

## THE 2005 AMERICAN HIKER

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

## MAJOR TRENDS IN HIKING

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

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

### Year 2005 Events of Note

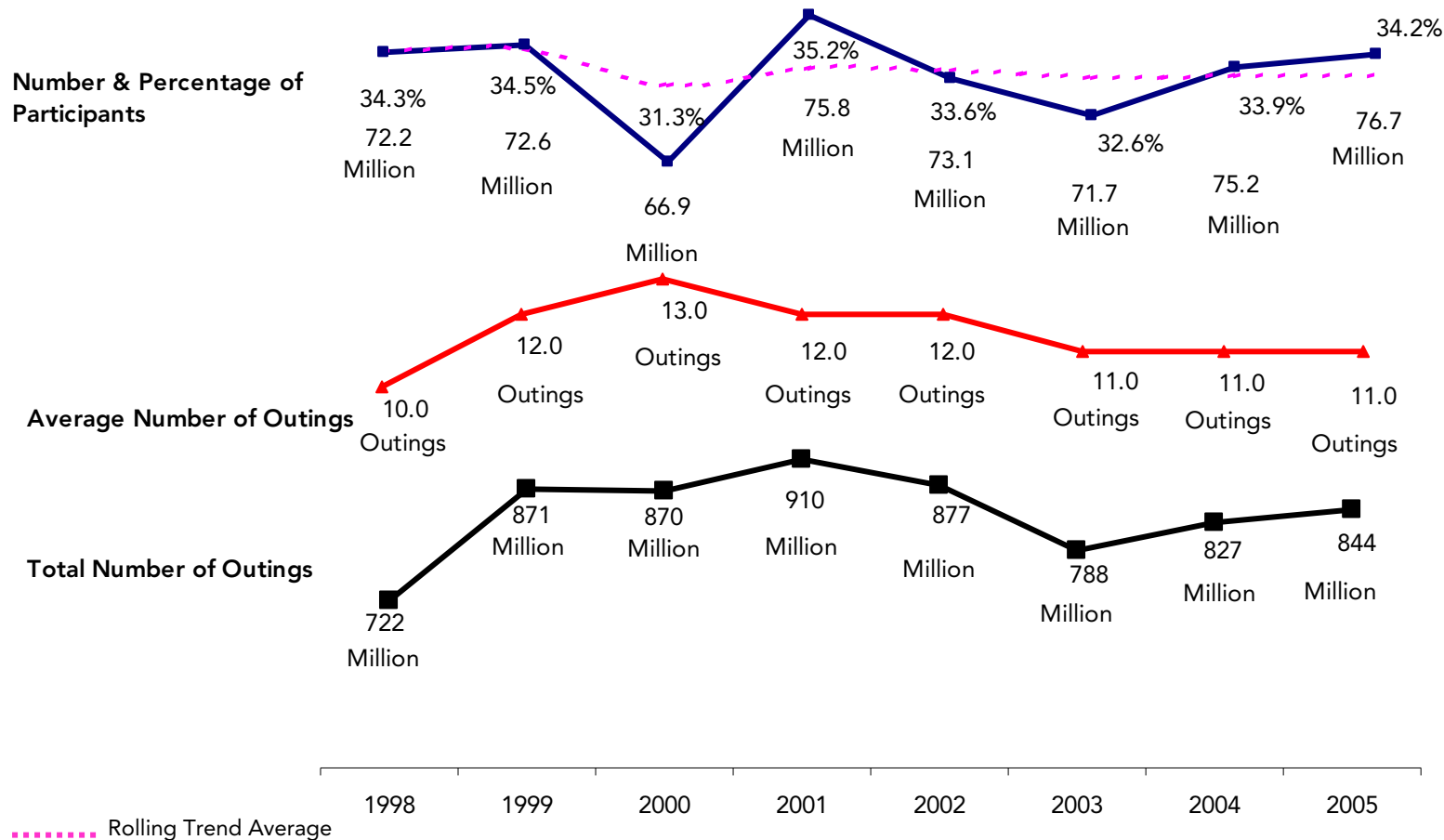
Hispanics Hikers are increasing.

### Observation/Implication

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

# HIKING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

During the past eight years, the total number of hiking outings generated by Americans 16 and older fluctuated between 722 million and 910 million. During 2005, the 76.7 million American Hikers went on 844 million total outings. For the past three years the average number of hiking outings has remained stable at 11 million.





# HIKING FREQUENCY OF PARTICIPATION

Americans who hiked in 2005 took to the trail an average of 11 times during the year, which has remained stable over the past three years. Hikers generated a total of 844 million outings up 17 million from the previous year.

One in five hikers participated in the activity 11 or more times in 2005. During 2005, hikers were most likely to hike between 3 and 10 times (45%).

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	18%	16%	16%	16%	17%	17%	17%	18%
2 times	18%	19%	19%	18%	20%	21%	21%	17%
3 to 6 times	36%	38%	38%	38%	36%	34%	33%	37%
7 to 10 times	9%	7%	8%	8%	8%	8%	9%	8%
<b>11 or more times (NET)</b>	<b>18%</b>	<b>21%</b>	<b>19%</b>	<b>21%</b>	<b>19%</b>	<b>19%</b>	<b>22%</b>	<b>20%</b>
11 to 15 times	7%	7%	6%	7%	6%	7%	8%	8%
16 to 20 times	3%	3%	3%	4%	4%	4%	4%	3%
21 to 50 times	6%	6%	6%	6%	5%	6%	6%	5%
51 or more times	2%	4%	3%	4%	4%	3%	4%	4%
<b>Average Frequency</b>	<b>10.0</b>	<b>12.0</b>	<b>13.0</b>	<b>12.0</b>	<b>12.0</b>	<b>11.0</b>	<b>11.0</b>	<b>11.0</b>
<b>Total Outings (Millions)</b>	<b>722</b>	<b>871</b>	<b>870</b>	<b>910</b>	<b>877</b>	<b>788</b>	<b>827</b>	<b>844</b>

  = Significant difference from 2003

# HIKING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

Hiking attracts a very balanced Participant population—with strong representation of Americans of both genders, all ages, household affluence, children in household and region.

Over the past two years Hiking has attracted more individuals from the Hispanic population. Nine percent of Hikers are Hispanic in 2005 compared to 6% in 2003.

## Demographic Profile

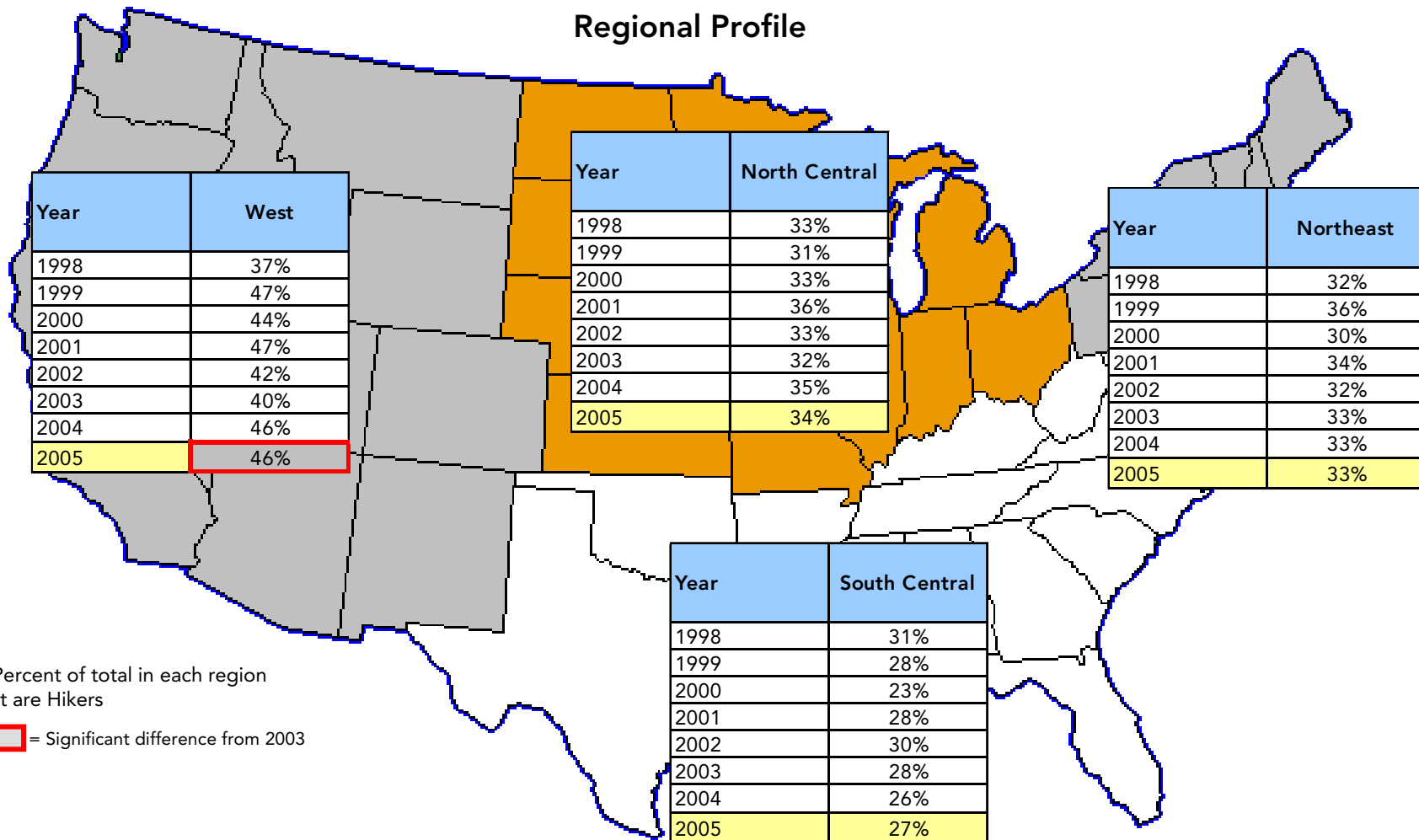
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	52%	52%	52%	54%	53%	57%	55%	56%
Female	48%	48%	48%	46%	47%	43%	45%	44%
<b>Age</b>								
16 to 24	21%	18%	24%	24%	26%	25%	26%	25%
25 to 34	22%	23%	20%	25%	22%	22%	22%	21%
35 to 44	23%	26%	23%	21%	19%	20%	20%	23%
45+	34%	33%	32%	30%	33%	32%	32%	31%
<b>Marital Status</b>								
Married	52%	56%	51%	48%	51%	52%	53%	54%
Unmarried	48%	44%	49%	52%	49%	48%	47%	45%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	87%	86%	84%
African-American	N/A	N/A	N/A	N/A	N/A	3%	3%	3%
Hispanic	N/A	N/A	N/A	N/A	N/A	6%	9%	9%
Asian	N/A	N/A	N/A	N/A	N/A	3%	1%	2%
Other	N/A	N/A	N/A	N/A	N/A	4%	6%	5%
<b>Children &lt;18</b>								
Yes	43%	46%	47%	41%	43%	48%	49%	48%
<b>Household Income</b>								
<\$40k	N/A	37%	37%	37%	34%	33%	31%	30%
\$40k - \$79k	N/A	51%	51%	45%	41%	43%	41%	40%
\$80k+	N/A	12%	12%	18%	25%	25%	28%	29%
<b>Region</b>								
Northeast	18%	18%	13%	19%	18%	19%	18%	18%
South Central	27%	29%	27%	27%	30%	30%	27%	28%
North Central	25%	21%	25%	22%	24%	22%	23%	22%
West	30%	33%	34%	32%	28%	29%	32%	32%

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

# HIKING: WHERE PARTICIPANTS LIVE\*

The Western region has the greatest percentage of hikers among their population. Almost half (46%) of those living in the West region are hikers. Western hikers increased in size in 2005 compared to 2003 where four in ten Westerns were hikers. The South Central region of the United States sees the smallest number of hikers (27%) among its population.

**Regional Profile**



\* Percent of total in each region that are Hikers

= Significant difference from 2003

# HIKING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Paved road bicycling, fishing (non fly), and camping are the activities that hikers are most likely to have also participated in during 2005. Hikers were less likely to participate in canoeing in 2005 (18%) compared to 2003 (22%).

## Crossover Activities

Activities	Hiking in 2003	Hiking In 2004	Hiking in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	14%	14%	14%	10,361,108
<b>Bicycling (Any Type)</b>	60%	58%	58%	44,413,181
Bicycling (Paved Road)	54%	54%	53%	40,568,254
<b>Bicycling (Mountain)</b>	40%	39%	38%	29,196,885
Bicycling (Single Track)	32%	31%	30%	23,243,534
Bicycling (Dirt Road)	31%	31%	28%	21,719,840
Bird Watching	14%	13%	12%	9,494,905
<b>Camping (Any Type)</b>	54%	52%	52%	40,066,951
Camping (Away from Car)	17%	17%	16%	12,301,181
Camping (Car)	39%	36%	38%	29,094,747
Canoeing	22%	22%	18%	13,877,125
<b>Climbing (Any Type)</b>	9%	8%	8%	6,395,537
Climbing (Artificial Wall)	6%	6%	6%	4,427,775
Climbing (Natural Rock)	5%	5%	5%	3,935,570
Climbing (Ice)	1%	1%	1%	697,737
Cross-Country/Nordic Skiing	9%	9%	9%	6,686,699
<b>Fishing (Any Type)</b>	N/A	50%	47%	35,795,762
Fishing (Fly)	11%	14%	12%	8,891,376
Fishing (Non-Fly)	N/A	48%	44%	33,700,335
<b>Hiking</b>	100%	100%	100%	76,719,769
<b>Kayaking (Any Type)</b>	10%	10%	12%	9,298,707
<b>Kayaking (Non-Whitewater)</b>	10%	9%	11%	8,786,914
Kayaking (Sit-On-Top)	7%	7%	8%	6,318,959
Kayaking (Tour/Sea)	6%	6%	6%	4,536,244
Kayaking (Whitewater)	2%	2%	2%	1,637,781
<b>Paddle sports (Any Type)</b>	32%	31%	30%	22,970,468
Rafting	11%	9%	9%	6,988,232
Snowshoeing	5%	5%	5%	4,102,224
Telemark Skiing	3%	3%	3%	2,438,828
Trail Running	32%	34%	32%	24,871,266

  = Significant difference from 2003

OUTDOOR RECREATION PARTICIPATION STUDY

# RAFTING

*"Have you gone rafting?"*

# RAFTING: 10.6 MILLION PARTICIPANTS, 21 MILLION OUTINGS

## THE 2005 AMERICAN RAFTER

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

## MAJOR TRENDS IN RAFTING

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

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

### Year 2005 Events of Note

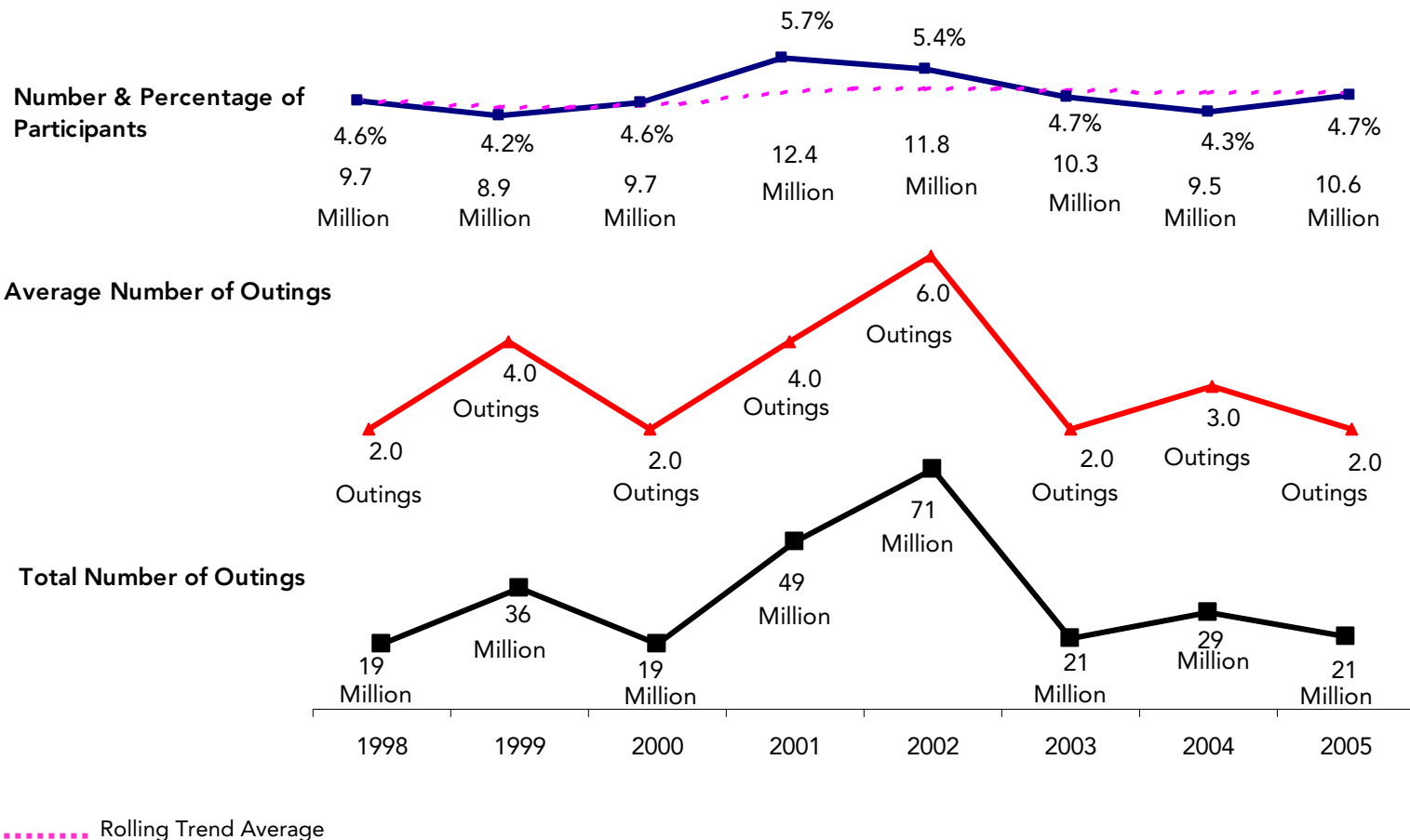
Both participation and frequency of participation in rafting is low. The majority of rafters only taking a single rafting outing during the year.

### Observation/Implication

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

# RAFTING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

The number of Americans who participated in rafting during 2005 is over 10 million. However, very few Americans go on a rafting trip more than once. The average number of rafting trips for 2005 is two, translating into 21 million rafting trips.



# RAFTING FREQUENCY OF PARTICIPATION

During the past eight years the majority of Americans who went rafting limited their participation to a single outing annually (60%)—the highest one-time frequency of any activity.

The average number of rafting outings in 2005 equaled two, which translated into 21 million outings. One of the lowest outings total over the past eight years.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	66%	60%	66%	56%	60%	53%	56%	60%
2 times	17%	16%	19%	17%	14%	27%	21%	20%
3 to 6 times	15%	15%	5%	16%	17%	16%	16%	14%
7 to 10 times	1%	4%	5%	3%	3%	2%	4%	3%
11 or more times	1%	3%	4%	7%	5%	2%	3%	3%
<b>Average Frequency</b>	<b>2.0</b>	<b>4.0</b>	<b>2.0</b>	<b>4.0</b>	<b>6.0</b>	<b>2.0</b>	<b>3.0</b>	<b>2.0</b>
<b>Total Outings (Millions)</b>	<b>19</b>	<b>36</b>	<b>19</b>	<b>49</b>	<b>71</b>	<b>21</b>	<b>29</b>	<b>21</b>



# RAFTING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

Almost two-thirds of rafters are male and two in five are between the ages of 16 and 24. A greater percentage of ethnic Americans went rafting in 2005 than did in 2003.

## Demographic Profile

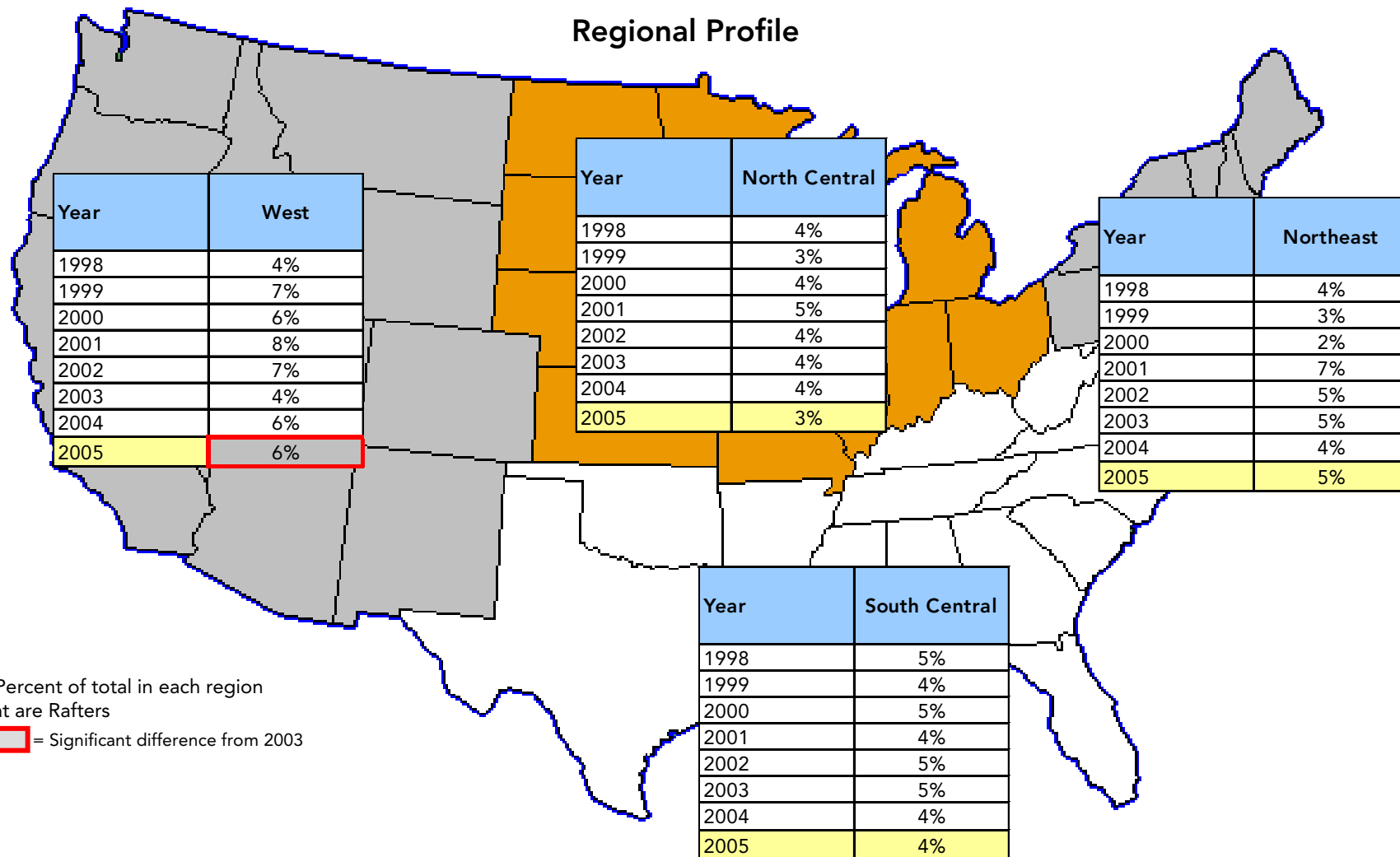
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	60%	52%	51%	62%	59%	59%	64%	63%
Female	40%	48%	49%	38%	41%	41%	36%	37%
<b>Age</b>								
16 to 24	39%	30%	43%	40%	35%	38%	43%	39%
25 to 34	19%	21%	19%	21%	19%	17%	11%	16%
35 to 44	16%	28%	21%	22%	20%	18%	22%	23%
45+	26%	21%	18%	17%	26%	26%	24%	22%
<b>Marital Status</b>								
Married	40%	54%	32%	34%	40%	42%	44%	46%
Unmarried	60%	46%	68%	66%	60%	58%	56%	54%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	91%	84%	82%
African-American	N/A	N/A	N/A	N/A	N/A	2%	3%	4%
Hispanic	N/A	N/A	N/A	N/A	N/A	5%	9%	10%
Asian	N/A	N/A	N/A	N/A	N/A	1%	3%	1%
Other	N/A	N/A	N/A	N/A	N/A	4%	3%	9%
<b>Children &lt;18</b>								
Yes	45%	51%	57%	41%	45%	48%	51%	53%
<b>Household Income</b>								
<\$40k	N/A	35%	42%	43%	30%	29%	26%	20%
\$40k - \$79k	N/A	50%	44%	41%	34%	40%	36%	41%
\$80k+	N/A	15%	14%	16%	36%	32%	38%	39%
<b>Region</b>								
Northeast	17%	10%	7%	24%	18%	22%	16%	21%
South Central	40%	34%	39%	26%	33%	35%	31%	31%
North Central	20%	19%	23%	17%	20%	22%	19%	16%
West	22%	38%	31%	33%	29%	21%	34%	33%

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

# RAFTING: WHERE PARTICIPANTS LIVE\*

The Western region has the greatest percentage of rafters among their population. Six percent of Westerners are rafters compared to 4.7% of the total population. The population of rafters in the West has grown since 2003. The North Central region has the lowest percentage of rafters.

## Regional Profile



\* Percent of total in each region that are Rafters

= Significant difference from 2003

# RAFTING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Fewer rafters in 2005 crossover into canoeing than did in 2003. Rafters also participate in hiking, camping, bicycling, and fishing.

## Crossover Activities

Activities	Rafting in 2003	Rafting In 2004	Rafting in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	27%	22%	20%	2,122,217
<b>Bicycling (Any Type)</b>	69%	67%	63%	6,712,369
Bicycling (Paved Road)	65%	61%	57%	6,017,750
<b>Bicycling (Mountain)</b>	45%	50%	46%	4,848,634
Bicycling (Single Track)	37%	46%	38%	4,064,424
Bicycling (Dirt Road)	39%	40%	34%	3,612,937
Bird Watching	11%	11%	12%	1,305,797
<b>Camping (Any Type)</b>	68%	70%	69%	7,344,414
Camping (Away from Car)	29%	29%	29%	3,067,252
Camping (Car)	44%	44%	44%	4,626,295
Canoeing	49%	41%	37%	3,902,924
<b>Climbing (Any Type)</b>	14%	19%	18%	1,889,021
Climbing (Artificial Wall)	9%	13%	15%	1,557,798
Climbing (Natural Rock)	10%	15%	8%	897,026
Climbing (Ice)	1%	2%	2%	251,046
Cross-Country/Nordic Skiing	12%	15%	16%	1,711,432
<b>Fishing (Any Type)</b>	N/A	57%	55%	5,874,148
Fishing (Fly)	17%	18%	17%	1,802,657
Fishing (Non-Fly)	N/A	54%	51%	5,462,695
Hiking	74%	73%	66%	6,988,232
<b>Kayaking (Any Type)</b>	20%	25%	19%	1,984,319
<b>Kayaking (Non-Whitewater)</b>	17%	23%	17%	1,768,511
Kayaking (Sit-On-Top)	14%	14%	13%	1,386,108
Kayaking (Tour/Sea)	8%	14%	8%	808,348
Kayaking (Whitewater)	7%	8%	6%	685,250
<b>Paddle sports (Any Type)</b>	100%	100%	100%	10,614,383
Rafting	100%	100%	100%	10,614,383
Snowshoeing	8%	8%	8%	835,620
Telemark Skiing	7%	10%	5%	508,101
Trail Running	37%	45%	39%	4,120,452

= Significant difference from 2003

OUTDOOR RECREATION PARTICIPATION STUDY  
**SNOWSHOEING**

*"Have you gone snowshoeing?"*

# SNOWSHOEING: 5.5 MILLION PARTICIPANTS, 22 MILLION OUTINGS

## THE 2005 AMERICAN SNOWSHOEING PARTICIPANT

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

## MAJOR TRENDS IN SNOWSHOEING

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

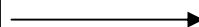
- Age: Trend results show a steady growth in 16 to 24 year-old snowshoeing since 1999—one-third of snowshoers fall within this age group in 2005.
- Gender: Snowshoeing is more gender balanced in 2005 compared to the past three years where more males participated in the sport.

### Year 2005 Events of Note

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

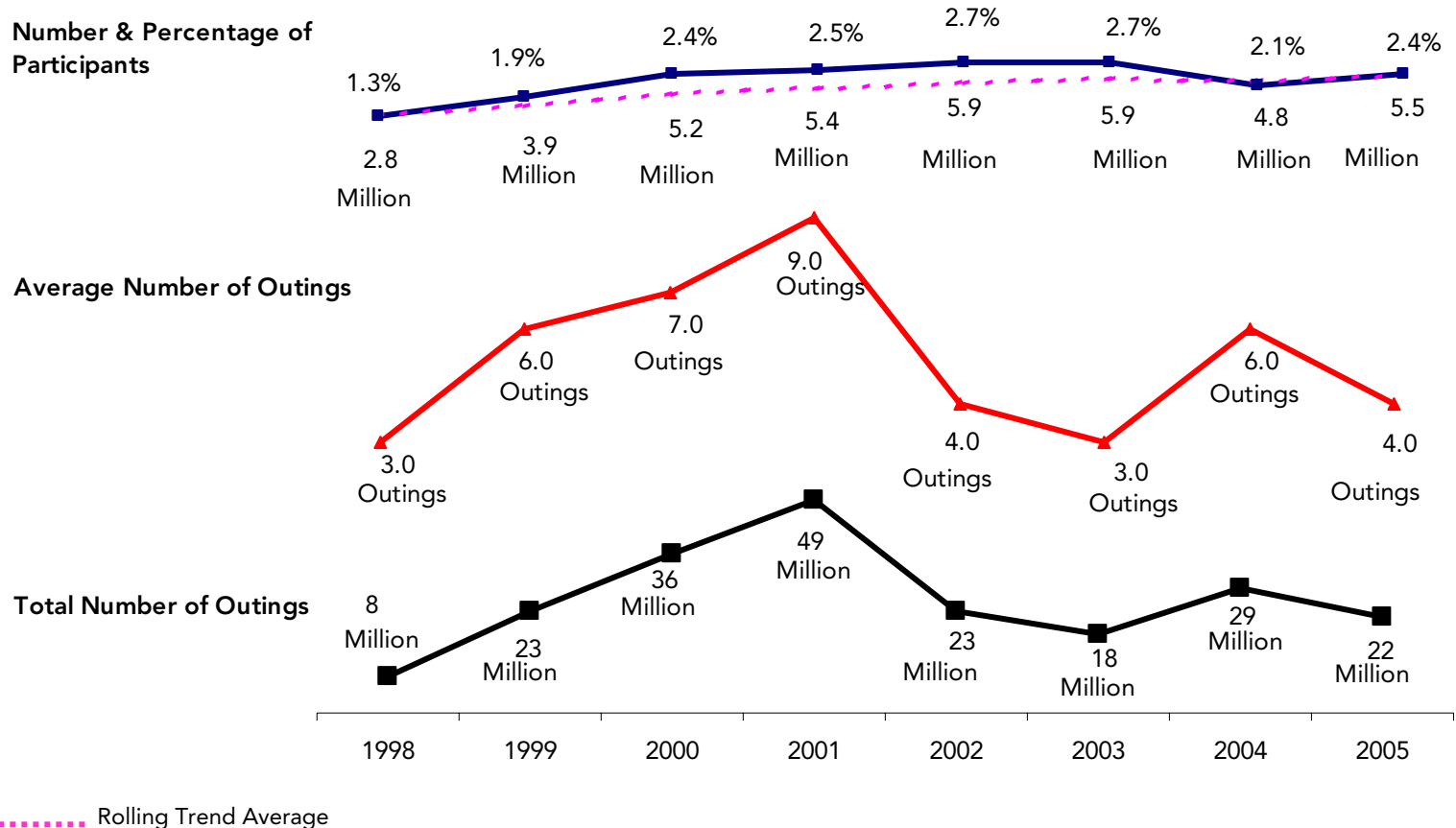
### Observation/Implication

Attract other winter sports enthusiasts especially younger enthusiasts.



# SNOWSHOEING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

In the past six years, snowshoeing has attracted between 5 and 6 million participants. The total number of outings generated is usually between 20 and 30 million. However, in 2000 and 2001 a record number of outings were measured.



# SNOWSHOEING: FREQUENCY OF PARTICIPATION

The average number of times that Americans went snowshoeing in 2005 equaled four outings. This translates to 22 million total outings for 2005, down 7 million from 2004.

The snowshoer population has historically been comprised of a significant percentage of Participants who go on only one or two outings per year. During 2005, 57% of snowshoe Participants fit this “casual” frequency profile.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	44%	30%	39%	34%	34%	41%	31%	29%
2 times	17%	21%	21%	17%	28%	18%	19%	28%
3 to 6 times	33%	30%	21%	24%	28%	30%	31%	31%
7 to 10 times	6%	9%	9%	6%	3%	6%	5%	4%
11 or more times	0%	9%	11%	18%	7%	6%	14%	9%
<b>Average Frequency</b>	<b>3.0</b>	<b>6.0</b>	<b>7.0</b>	<b>9.0</b>	<b>4.0</b>	<b>3.0</b>	<b>6.0</b>	<b>4.0</b>
<b>Total Outings (Millions)</b>	<b>8</b>	<b>23</b>	<b>36</b>	<b>49</b>	<b>23</b>	<b>18</b>	<b>29</b>	<b>22</b>

# SNOWSHOEING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

During 2005, the snowshoer population returned to traditional levels. The population was more equally split between males and females and married and unmarried individuals. Almost a third of participants were each between the ages of 16 and 24 (34%) and over the age of 45 (30%). The Northeast sees the greatest percentage of snowshoers.

## Demographic Profile

Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	65%	66%	64%	56%	67%	62%	70%	55%
Female	35%	34%	36%	44%	33%	38%	30%	45%
<b>Age</b>								
16 to 24	30%	20%	24%	32%	30%	26%	26%	34%
25 to 34	25%	26%	15%	27%	19%	25%	27%	16%
35 to 44	20%	19%	25%	17%	20%	18%	10%	20%
45+	25%	35%	36%	24%	31%	30%	37%	30%
<b>Marital Status</b>								
Married	50%	52%	48%	47%	50%	52%	54%	54%
Unmarried	50%	48%	51%	53%	49%	48%	46%	46%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	77%	83%	82%
African-American	N/A	N/A	N/A	N/A	N/A	4%	4%	3%
Hispanic	N/A	N/A	N/A	N/A	N/A	9%	12%	9%
Asian	N/A	N/A	N/A	N/A	N/A	6%	1%	5%
Other	N/A	N/A	N/A	N/A	N/A	8%	5%	3%
<b>Children &lt;18</b>								
Yes	50%	29%	39%	35%	39%	48%	35%	42%
<b>Household Income</b>								
<\$40k	N/A	33%	36%	39%	35%	30%	23%	23%
\$40k - \$79k	N/A	53%	43%	36%	35%	49%	39%	46%
\$80k+	N/A	15%	20%	25%	31%	21%	38%	32%
<b>Region</b>								
Northeast	30%	21%	19%	29%	27%	29%	36%	40%
South Central	30%	13%	16%	14%	24%	21%	10%	12%
North Central	25%	20%	22%	18%	16%	17%	21%	19%
West	15%	46%	43%	39%	33%	32%	33%	29%

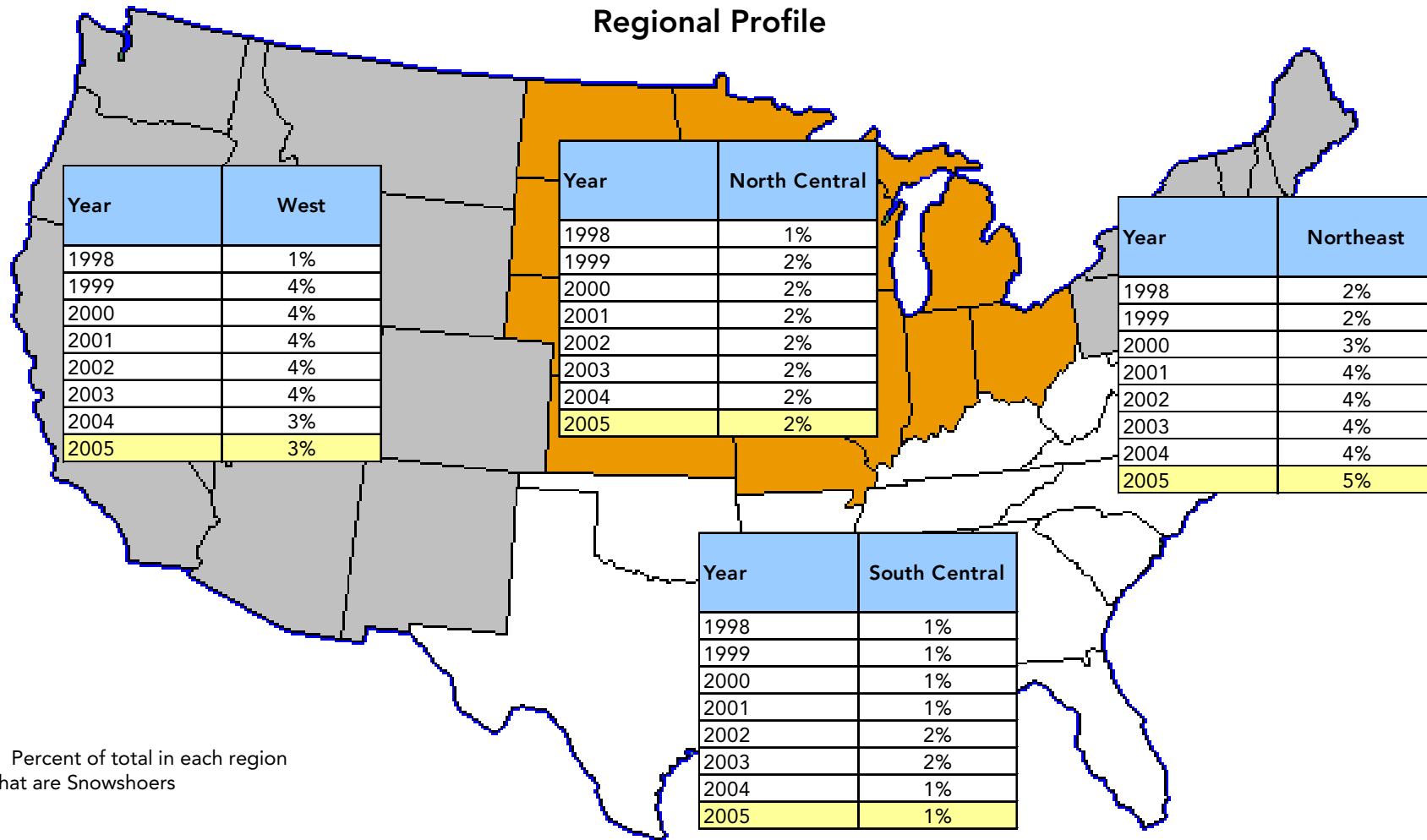
\*Ethnicity: Will not add to 100%, see page 239 for details.



# SNOWSHOEING: WHERE PARTICIPANTS LIVE\*

The Northeast region has the greatest percentage of snowshoers among its population. Five percent of Northeasterners participate in snowshoeing compared to 2.4% of the total population. The South Central region has the lowest percentage of snowshoers (1%).

## Regional Profile



\* Percent of total in each region that are Snowshoers

# SNOWSHOEING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Compared to the total population, snowshoers are more likely to participate in other winter sports activities such as Telemark skiing and cross-country/Nordic skiing. Hiking is the most popular activity among snowshoers.

## Crossover Activities

Activities	Snowshoeing in 2003	Snowshoeing In 2004	Snowshoeing in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	24%	31%	29%	1,597,262
<b>Bicycling (Any Type)</b>	61%	58%	67%	3,645,922
Bicycling (Paved Road)	52%	50%	61%	3,345,375
<b>Bicycling (Mountain)</b>	43%	41%	53%	2,885,958
Bicycling (Single Track)	32%	34%	44%	2,399,464
Bicycling (Dirt Road)	38%	33%	40%	2,212,084
Bird Watching	14%	23%	19%	1,025,600
<b>Camping (Any Type)</b>	57%	52%	51%	2,776,525
Camping (Away from Car)	26%	31%	23%	1,270,600
Camping (Car)	32%	23%	31%	1,722,549
Canoeing	38%	36%	29%	1,605,568
<b>Climbing (Any Type)</b>	9%	17%	18%	1,001,980
Climbing (Artificial Wall)	7%	14%	14%	750,934
Climbing (Natural Rock)	5%	11%	8%	434,733
Climbing (Ice)	2%	8%	3%	151,567
Cross-Country/Nordic Skiing	33%	33%	27%	1,499,186
<b>Fishing (Any Type)</b>	N/A	55%	52%	2,840,899
Fishing (Fly)	19%	25%	24%	1,314,024
Fishing (Non-Fly)	N/A	51%	46%	2,531,278
Hiking	63%	80%	75%	4,102,224
<b>Kayaking (Any Type)</b>	15%	21%	17%	939,090
<b>Kayaking (Non-Whitewater)</b>	14%	19%	17%	939,090
Kayaking (Sit-On-Top)	13%	15%	11%	619,242
Kayaking (Tour/Sea)	5%	11%	7%	367,905
Kayaking (Whitewater)	3%	8%	2%	128,234
<b>Paddle sports (Any Type)</b>	42%	46%	41%	2,248,672
Rafting	13%	16%	15%	835,620
<b>Snowshoeing</b>	100%	100%	100%	5,473,123
Telemark Skiing	19%	11%	14%	762,839
Trail Running	35%	43%	40%	2,166,328

OUTDOOR RECREATION PARTICIPATION STUDY  
**TELEMARK SKIING**

*"Have you gone Telemark skiing?"  
(downhill with Telemark bindings that allow a free-heel skiing experience)*

# TELEMARK SKIING: 3.5 MILLION PARTICIPANTS, 14 MILLION OUTINGS

## THE 2005 AMERICAN TELEMARK SKIER

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

## MAJOR TRENDS IN TELEMARK SKIING

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

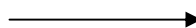
- Age: Telemark skiing continues to be a sport of young adults. Four in ten Americans who Telemark ski are between the ages of 16 and 24. In 2005, almost a third of Telemark skiers were between the ages of 35 and 44.
- Crossover Activities: Participants in 2005 are more likely to participate in cross-country/Nordic skiing and less likely to participate in Climbing (artificial wall) compared to participants in 2003

Note: A revision made to the description of cross-country/Nordic skiing in 2001 may have impacted trend results for this category.

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

### Year 2005 Events of Note

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

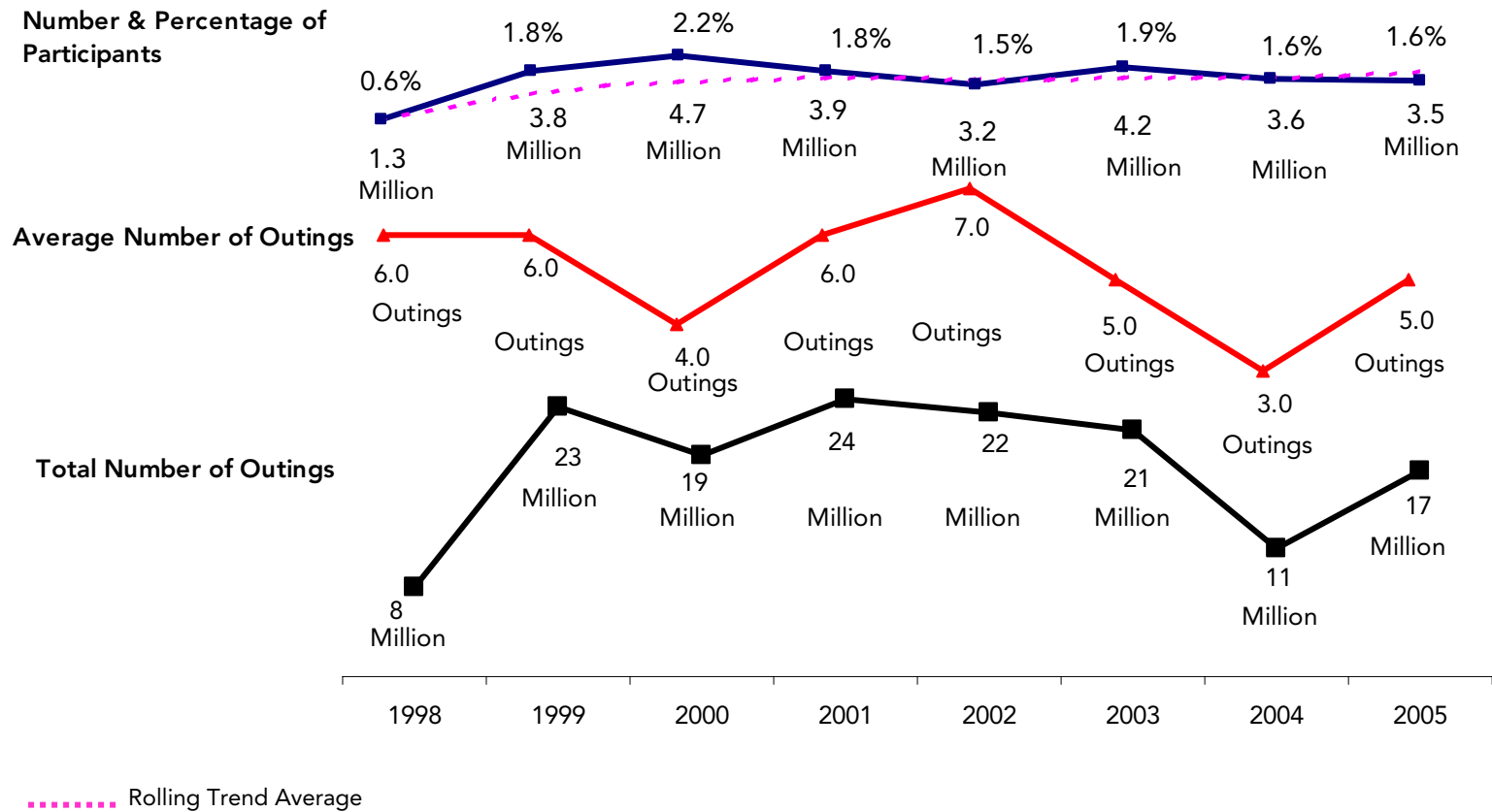


### Observation/Implication

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

# TELEMARK SKIING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

Participation in Telemark skiing hovers between 1% and 2% of the total American population 16 years of age or older. For the past two years the total number of Telemark outings has returned to near the all time low number of outings seen in 1998.



# TELEMARK SKIING: FREQUENCY OF PARTICIPATION

The 3.5 million Telemark skiers went on five outings on average for a total of 17 million outings.

The majority (58%) of Telemark skiers only participate 1-2 times a season.

## Frequency and Outings Among Americans 16 and Older

<b>Frequency</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>
1 time	44%	20%	44%	31%	23%	35%	47%	43%
2 times	0%	22%	19%	16%	25%	22%	21%	15%
3 to 6 times	33%	31%	25%	31%	23%	31%	21%	26%
7 to 10 times	0%	9%	6%	9%	12%	1%	3%	5%
11 or more times	22%	17%	6%	13%	17%	11%	8%	10%
<b>Average Frequency</b>	<b>6.0</b>	<b>6.0</b>	<b>4.0</b>	<b>6.0</b>	<b>7.0</b>	<b>5.0</b>	<b>3.0</b>	<b>5.0</b>
<b>Total Outings (Millions)</b>	<b>8</b>	<b>23</b>	<b>19</b>	<b>24</b>	<b>22</b>	<b>21</b>	<b>11</b>	<b>17</b>

Note: Extremely small base size

# TELEMARK SKIING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

Telemark skiers are most likely to be young. Forty-two percent of Telemark skiers are between the ages of 16 and 24. Only 10% are over the age of 45. Over half of participants are male and they are mainly distributed across the Northeast, South Central and Western regions.

## Demographic Profile

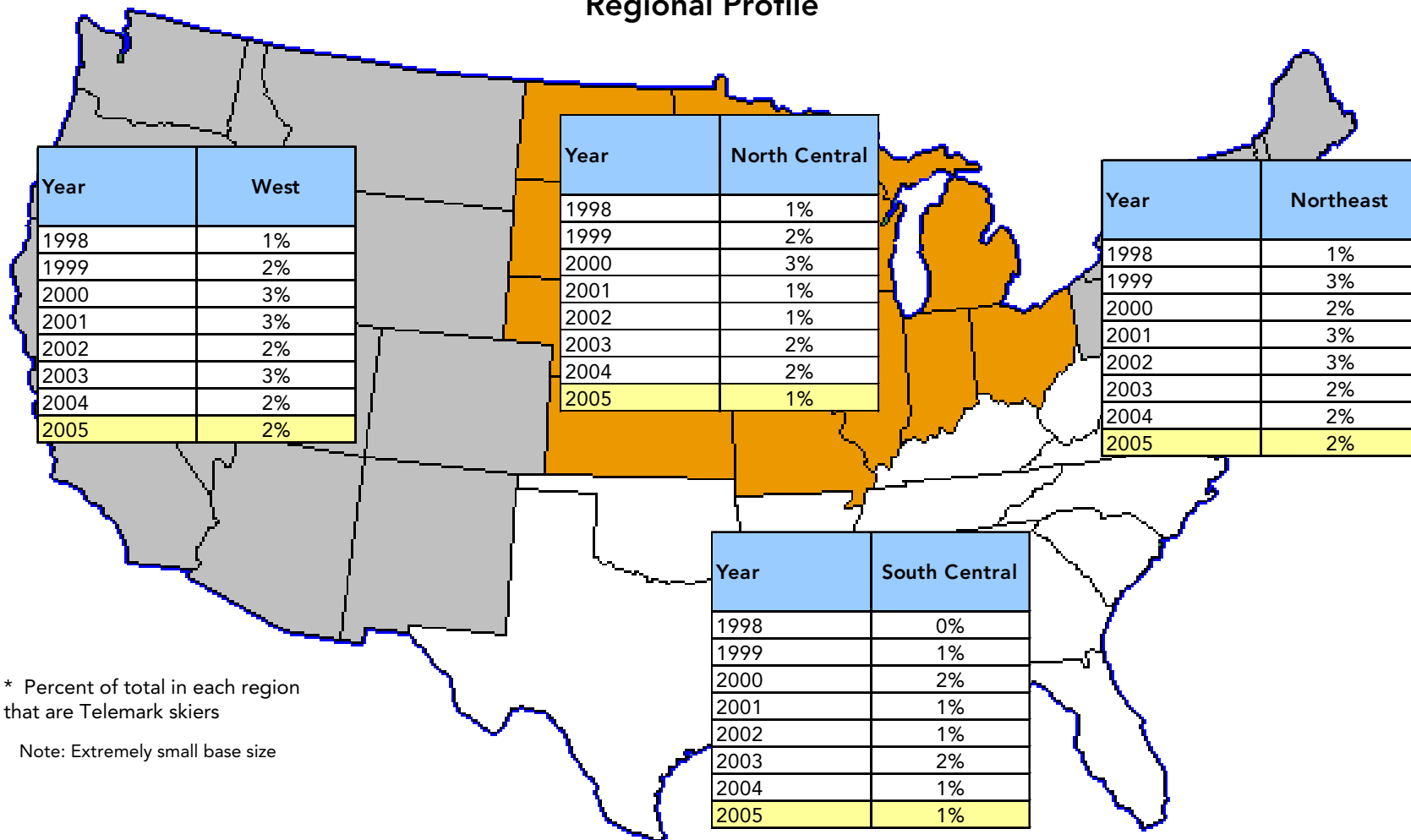
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	33%	69%	58%	58%	66%	61%	69%	57%
Female	67%	31%	42%	42%	34%	39%	31%	43%
<b>Age</b>								
16 to 24	22%	18%	37%	40%	42%	43%	47%	42%
25 to 34	44%	31%	20%	25%	17%	23%	14%	18%
35 to 44	22%	35%	20%	17%	25%	17%	20%	31%
45+	11%	16%	22%	18%	15%	18%	20%	10%
<b>Marital Status</b>								
Married	33%	53%	42%	39%	36%	38%	36%	45%
Unmarried	67%	47%	56%	61%	64%	62%	64%	55%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	75%	81%	80%
African-American	N/A	N/A	N/A	N/A	N/A	5%	4%	9%
Hispanic	N/A	N/A	N/A	N/A	N/A	8%	14%	4%
Asian	N/A	N/A	N/A	N/A	N/A	7%	4%	2%
Other	N/A	N/A	N/A	N/A	N/A	9%	4%	6%
<b>Children &lt;18</b>								
Yes	44%	44%	48%	42%	53%	53%	55%	55%
<b>Household Income</b>								
<\$40k	N/A	32%	25%	36%	41%	17%	35%	22%
\$40k - \$79k	N/A	56%	56%	38%	35%	45%	31%	40%
\$80k+	N/A	12%	19%	25%	24%	38%	35%	38%
<b>Region</b>								
Northeast	33%	27%	11%	29%	36%	16%	26%	27%
South Central	11%	27%	28%	16%	25%	32%	23%	28%
North Central	22%	20%	28%	17%	10%	25%	23%	17%
West	33%	25%	32%	39%	29%	27%	28%	28%

\*Ethnicity: Will not add to 100%, see page 239 for details. Note: Extremely small base size

# TELEMARK SKIING: WHERE PARTICIPANTS LIVE\*

Though still a small group, the Western and Northeast regions see the greatest percentage of Telemark skiers among their populations.

## Regional Profile



\* Percent of total in each region that are Telemark skiers

Note: Extremely small base size




# TELEMARK SKIING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

In 2005, Telemark skiers were less likely to participate in Climbing (artificial wall) and more likely to cross-country/Nordic ski compared to participants in 2003 or 2004.

## Crossover Activities

Activities	Telemark Skiers in 2003	Telemark Skiers In 2004	Telemark Skiers in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	17%	19%	28%	986,912
<b>Bicycling (Any Type)</b>	64%	62%	61%	2,127,640
Bicycling (Paved Road)	56%	60%	56%	1,955,328
<b>Bicycling (Mountain)</b>	40%	48%	40%	1,388,656
Bicycling (Single Track)	33%	47%	35%	1,228,301
Bicycling (Dirt Road)	30%	38%	33%	1,143,563
Bird Watching	11%	16%	7%	242,792
<b>Camping (Any Type)</b>	61%	61%	62%	2,180,333
Camping (Away from Car)	23%	17%	30%	1,060,103
Camping (Car)	38%	44%	35%	1,223,740
Canoeing	23%	25%	19%	675,553
<b>Climbing (Any Type)</b>	18%	20%	7%	245,093
Climbing (Artificial Wall)	16%	16%	4%	141,583
Climbing (Natural Rock)	11%	14%	5%	164,916
Climbing (Ice)	4%	6%	3%	103,510
Cross-Country/Nordic Skiing	21%	28%	41%	1,420,616
<b>Fishing (Any Type)</b>	N/A	67%	56%	1,945,401
Fishing (Fly)	17%	23%	16%	550,735
Fishing (Non-Fly)	N/A	63%	50%	1,739,290
Hiking	49%	64%	70%	2,438,828
<b>Kayaking (Any Type)</b>	13%	13%	12%	405,977
<b>Kayaking (Non-Whitewater)</b>	13%	13%	12%	405,977
Kayaking (Sit-On-Top)	13%	11%	5%	160,355
Kayaking (Tour/Sea)	5%	7%	7%	245,623
Kayaking (Whitewater)	3%	10%	0%	0
<b>Paddle sports (Any Type)</b>	32%	40%	41%	1,448,048
Rafting	15%	27%	15%	508,101
Snowshoeing	22%	15%	22%	762,839
Telemark Skiing	100%	100%	100%	3,498,521
Trail Running	37%	60%	50%	1,753,443

 = Significant difference from 2003    Note: Extremely small base size

OUTDOOR RECREATION PARTICIPATION STUDY  
**TRAIL RUNNING**

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

# TRAIL RUNNING: 40.4 MILLION PARTICIPANTS, 1.3 BILLION OUTINGS

## THE 2005 AMERICAN TRAIL RUNNER

- Primarily male and unmarried
- Mean age of 29 years
- Most likely to live in the Western region
- Stay active when not trail running by participating in hiking, camping and bicycling
- Hit the trails 33 times, on average, during 2005
- Forty-one percent participated 11 or more times in 2005

## MAJOR TRENDS IN TRAIL RUNNING

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

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

### Year 2005 Events of Note

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

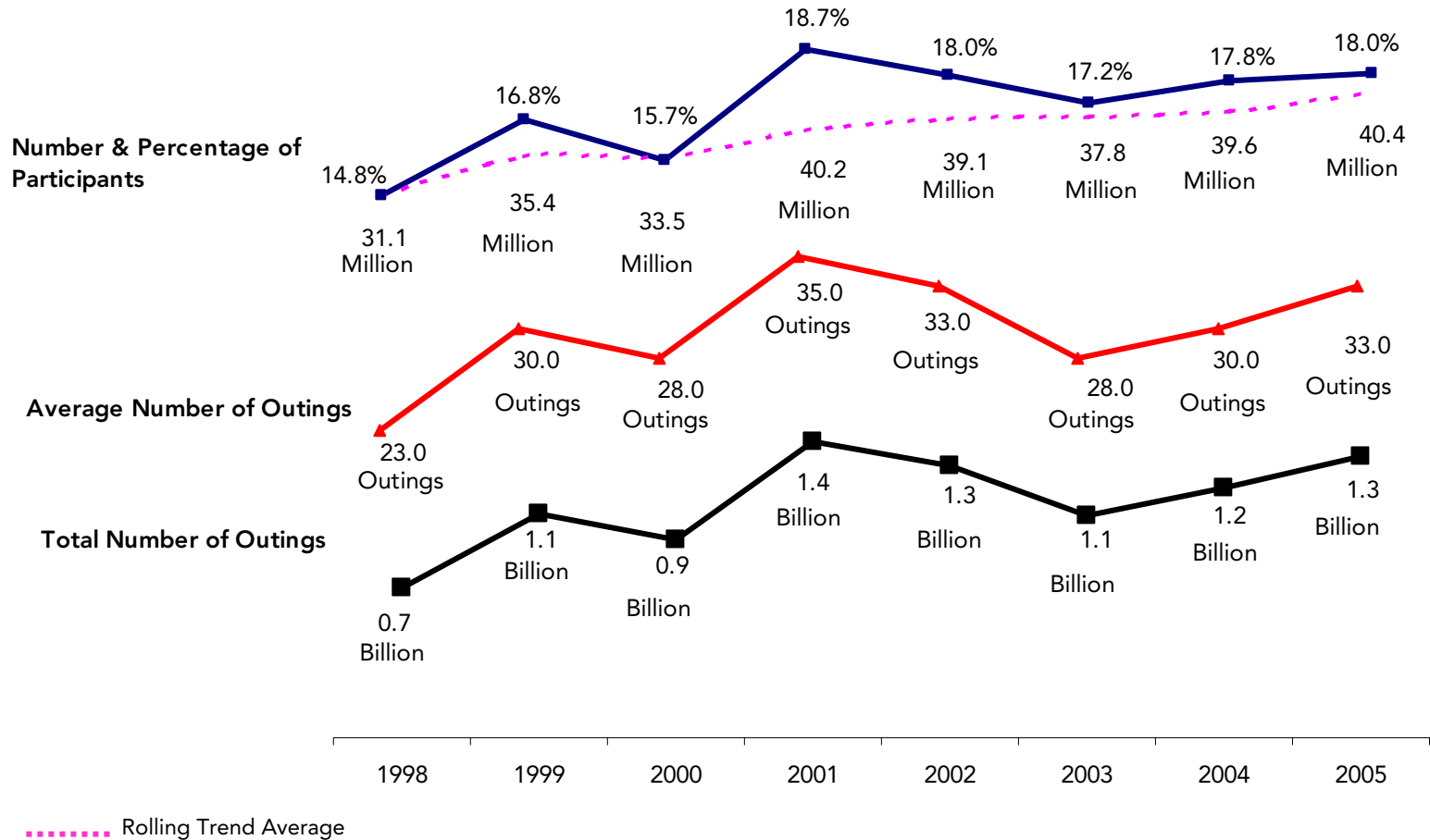
### Observation/Implication

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



# TRAIL RUNNING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

For the past five years trail running has sustained the growth it experienced in 2001. Currently 40 million Americans indicate that they hit the trails at least once a year—up from 31 million in 1998. During 2005, 40 million trail runners averaged 33 outings for a total of 1.3 billion trail running outings.



# TRAIL RUNNING FREQUENCY OF PARTICIPATION

Forty-one percent of trail runners participate 11 or more times a year and 17% participate over 50 times a year. This is not an activity that many individuals try only once— just 9% of trail runners indicate that they participated once in 2005.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	8%	9%	10%	9%	10%	9%	9%	9%
2 times	17%	13%	15%	13%	12%	14%	14%	13%
3 to 6 times	34%	25%	27%	29%	28%	28%	28%	28%
7 to 10 times	10%	10%	8%	10%	9%	8%	9%	9%
<b>11 or more times (NET)</b>	<b>32%</b>	<b>42%</b>	<b>40%</b>	<b>39%</b>	<b>41%</b>	<b>41%</b>	<b>39%</b>	<b>41%</b>
11 to 15 times	8%	9%	10%	7%	8%	8%	9%	6%
16 to 20 times	6%	6%	6%	6%	5%	7%	5%	7%
21 to 50 times	8%	14%	13%	12%	13%	13%	12%	11%
51 to 100 times	6%	6%	5%	6%	7%	7%	8%	9%
101 or more times	5%	7%	6%	8%	8%	6%	6%	8%
<b>Average Frequency</b>	<b>23.0</b>	<b>30.0</b>	<b>28.0</b>	<b>35.0</b>	<b>33.0</b>	<b>28.0</b>	<b>30.0</b>	<b>33.0</b>
<b>Total Outings (Billions)</b>	<b>0.7</b>	<b>1.1</b>	<b>0.9</b>	<b>1.4</b>	<b>1.3</b>	<b>1.1</b>	<b>1.2</b>	<b>1.3</b>

# TRAIL RUNNING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

Two-thirds of trail runners are male and unmarried and half are between the ages of 16 and 24. Just under one-third of trail runners are over the age of 35.

During 2005, growth was seen in participation among Hispanics and in the Western states.

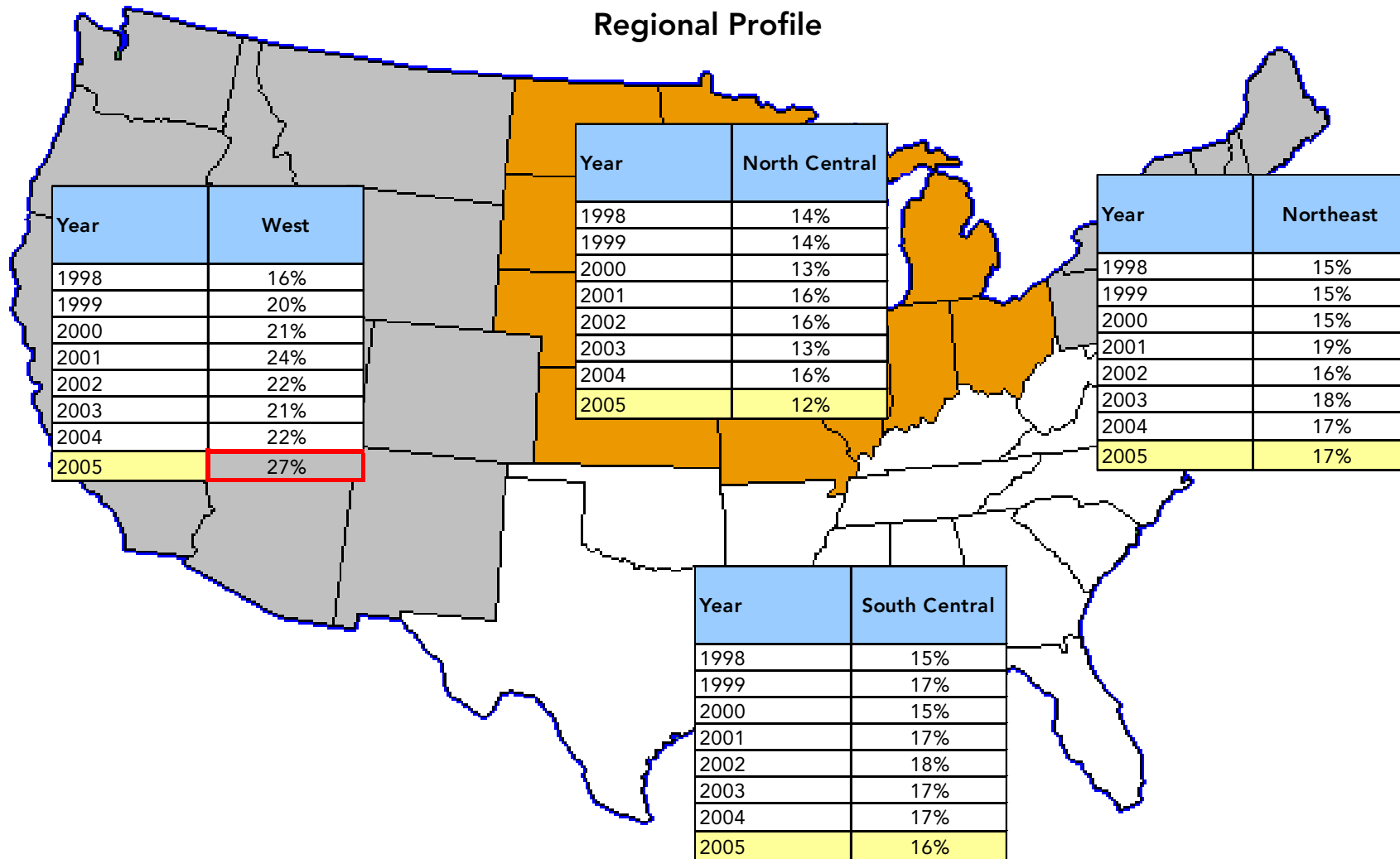
## Demographic Profile

Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	55%	61%	61%	59%	62%	63%	62%	66%
Female	45%	39%	39%	41%	38%	37%	38%	34%
<b>Age</b>								
16 to 24	36%	34%	45%	43%	44%	46%	45%	50%
25 to 34	21%	24%	24%	27%	21%	22%	26%	20%
35 to 44	23%	20%	15%	16%	16%	14%	15%	15%
45+	19%	21%	16%	14%	20%	17%	14%	15%
<b>Marital Status</b>								
Married	43%	40%	36%	34%	38%	36%	36%	37%
Unmarried	57%	60%	64%	66%	62%	64%	64%	63%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	75%	73%	71%
African-American	N/A	N/A	N/A	N/A	N/A	9%	9%	10%
Hispanic	N/A	N/A	N/A	N/A	N/A	11%	15%	16%
Asian	N/A	N/A	N/A	N/A	N/A	3%	3%	1%
Other	N/A	N/A	N/A	N/A	N/A	6%	8%	8%
<b>Children &lt;18</b>								
Yes	49%	49%	53%	43%	49%	54%	54%	56%
<b>Household Income</b>								
<\$40k	N/A	41%	44%	40%	36%	35%	34%	33%
\$40k - \$79k	N/A	50%	43%	41%	38%	38%	37%	36%
\$80k+	N/A	9%	13%	19%	26%	27%	29%	31%
<b>Region</b>								
Northeast	17%	15%	13%	20%	17%	19%	17%	18%
South Central	33%	37%	35%	31%	34%	35%	32%	32%
North Central	21%	19%	20%	18%	23%	18%	20%	14%
West	29%	29%	32%	31%	26%	28%	30%	36%

\*Ethnicity: Will not add to 100%, see page 239 for details. 16% = Significant difference from 2003

# TRAIL RUNNING: WHERE PARTICIPANTS LIVE\*

The Western region has the greatest percentage of trail runners among its population. Over a quarter (27%) of Westerners trail run. This is up from 2003 when 21% of Westerners were trail runners.



\* Percent of total in each region that are trail runners

# TRAIL RUNNING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

During 2005, hiking, camping and bicycling are other popular activities among trail runners.

## Crossover Activities

Activities	Trail Running in 2003	Trail Running In 2004	Trail Running in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	15%	14%	17%	6,916,158
<b>Bicycling (Any Type)</b>	66%	67%	62%	25,224,905
Bicycling (Paved Road)	58%	60%	56%	22,728,022
<b>Bicycling (Mountain)</b>	49%	52%	49%	19,678,862
Bicycling (Single Track)	41%	43%	41%	16,574,318
Bicycling (Dirt Road)	39%	42%	38%	15,397,904
Bird Watching	10%	9%	10%	4,229,876
<b>Camping (Any Type)</b>	47%	48%	52%	21,198,851
Camping (Away from Car)	17%	19%	21%	8,520,049
Camping (Car)	30%	30%	34%	13,779,156
Canoeing	19%	22%	18%	7,095,911
<b>Climbing (Any Type)</b>	13%	11%	14%	5,769,135
Climbing (Artificial Wall)	10%	9%	10%	4,149,644
Climbing (Natural Rock)	7%	7%	8%	3,378,305
Climbing (Ice)	1%	2%	1%	574,925
Cross-Country/Nordic Skiing	11%	10%	11%	4,466,216
<b>Fishing (Any Type)</b>	N/A	51%	48%	19,462,351
Fishing (Fly)	8%	12%	11%	4,400,831
Fishing (Non-Fly)	N/A	49%	45%	18,273,319
Hiking	61%	65%	62%	24,871,266
<b>Kayaking (Any Type)</b>	12%	13%	14%	5,593,267
<b>Kayaking (Non-Whitewater)</b>	11%	12%	13%	5,192,380
Kayaking (Sit-On-Top)	8%	9%	8%	3,358,530
Kayaking (Tour/Sea)	8%	8%	7%	2,867,704
Kayaking (Whitewater)	2%	4%	3%	1,147,542
<b>Paddle sports (Any Type)</b>	29%	31%	30%	11,975,505
Rafting	10%	11%	10%	4,120,452
Snowshoeing	6%	5%	5%	2,166,328
Telemark Skiing	5%	5%	4%	1,753,443
Trail Running	100%	100%	100%	40,400,688



OUTDOOR RECREATION PARTICIPATION STUDY  
**NEW ACTIVITIES ADDED SINCE 1998**

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: 15.6 MILLION PARTICIPANTS, 188 MILLION OUTINGS

## THE 2005 AMERICAN BIRD WATCHER

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

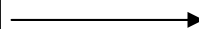
## MAJOR TRENDS IN BIRD WATCHING

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

Demographically, the bird watching population has remained very stable.

### Year 2005 Events of Note

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

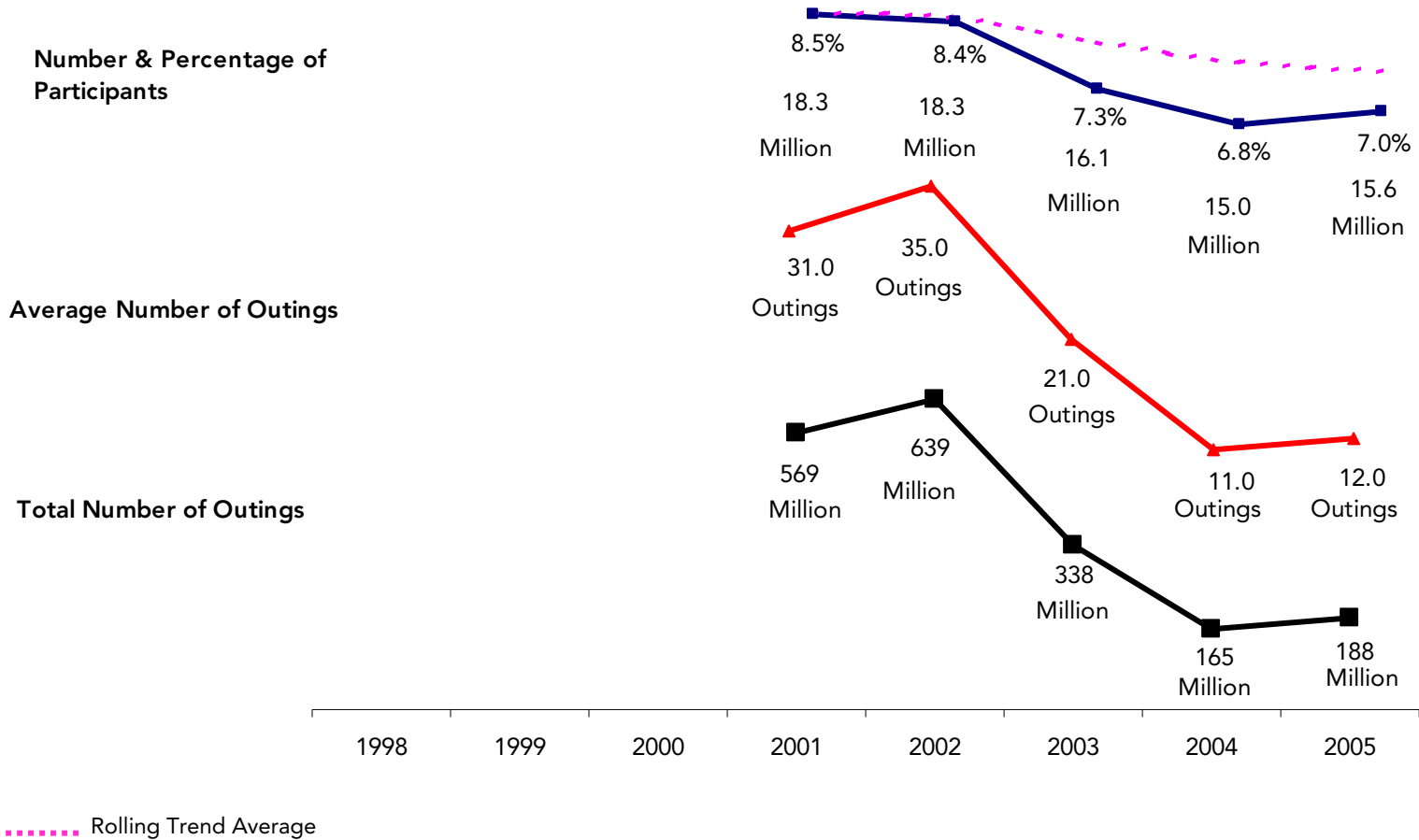


### Observation/Implication

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

# BIRD WATCHING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

Participation in bird watching during 2005 has declined from 2001 and 2002 when it was first measured. Not only has participation declined but the average number of outings have dropped from 23 to 12. The combination of fewer Americans participating in the activity and a sharp decline in the number of average outings has lead to a total number of outings in 2005 that registered well below the total number of outings generated in 2001 and 2002.



# BIRD WATCHING: FREQUENCY OF PARTICIPATION

Close to a third of bird watchers only participate in the activity once a year. Fifteen percent of bird watchers go out on excursions 11 or more times a year—a significant decline from 2003 when almost a quarter of bird watchers participated 11 or more times a year.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	N/A	N/A	N/A	27%	26%	24%	29%	30%
2 times	N/A	N/A	N/A	20%	18%	20%	17%	19%
3 to 6 times	N/A	N/A	N/A	24%	24%	27%	31%	26%
7 to 10 times	N/A	N/A	N/A	6%	6%	5%	8%	9%
<b>11 or more times (NET)</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>22%</b>	<b>26%</b>	<b>24%</b>	<b>15%</b>	<b>15%</b>
11 to 30	N/A	N/A	N/A	10%	11%	15%	11%	10%
31 or more times	N/A	N/A	N/A	12%	15%	9%	4%	5%
<b>Average Frequency</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>31.0</b>	<b>35.0</b>	<b>21.0</b>	<b>11.0</b>	<b>12.0</b>
<b>Total Outings (Millions)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>569</b>	<b>639</b>	<b>338</b>	<b>165</b>	<b>188</b>

= Significant difference from 2003

# BIRD WATCHING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

During 2005, the bird watching population was well balanced among males and females, married and unmarried and across all regions. The activity is predominantly Caucasians and over two-thirds of bird watchers are over the age of 35, with almost half over the age of 45.

Just over a third of bird watchers have children under the age of 18 living in their household.

## Demographic Profile

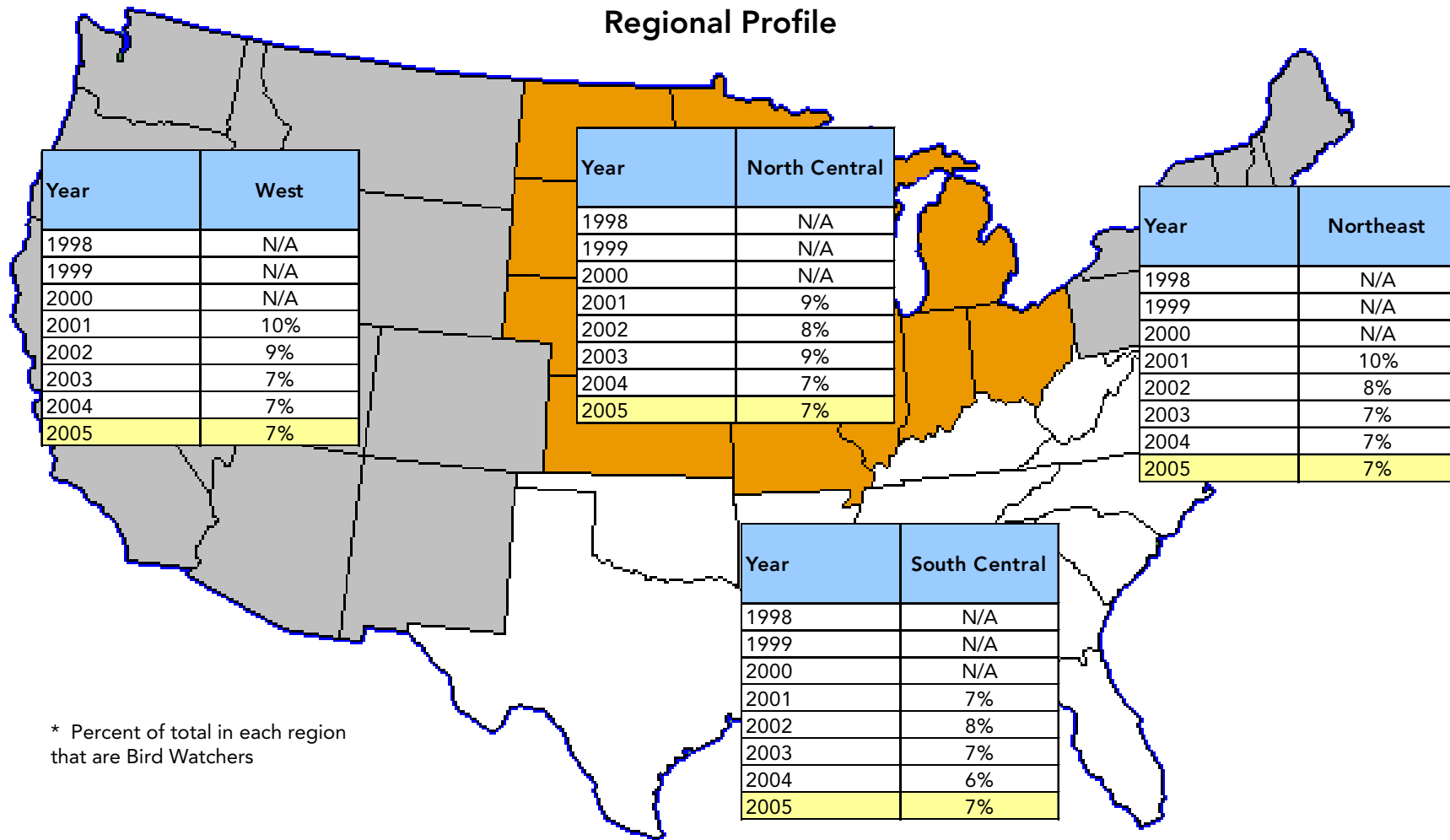
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	N/A	N/A	N/A	50%	47%	56%	48%	51%
Female	N/A	N/A	N/A	50%	53%	44%	52%	49%
<b>Age</b>								
16 to 24	N/A	N/A	N/A	15%	14%	15%	11%	14%
25 to 34	N/A	N/A	N/A	16%	16%	16%	16%	18%
35 to 44	N/A	N/A	N/A	23%	16%	17%	22%	20%
45+	N/A	N/A	N/A	45%	54%	52%	51%	49%
<b>Marital Status</b>								
Married	N/A	N/A	N/A	52%	54%	56%	61%	56%
Unmarried	N/A	N/A	N/A	48%	46%	44%	39%	44%
<b>Ethnicity</b>								
Caucasian	NA	NA	NA	NA	NA	81%	80%	83%
African-American	NA	NA	NA	NA	NA	3%	6%	5%
Hispanic	NA	NA	NA	NA	NA	10%	10%	9%
Asian	NA	NA	NA	NA	NA	3%	2%	2%
Other	NA	NA	NA	NA	NA	6%	9%	6%
<b>Children &lt;18</b>								
Yes	N/A	N/A	N/A	34%	29%	37%	45%	38%
<b>Household Income</b>								
<\$40k	NA	N/A	N/A	42%	43%	34%	37%	39%
\$40k - \$79k	NA	N/A	N/A	40%	37%	44%	43%	41%
\$80k+	NA	N/A	N/A	18%	21%	23%	21%	20%
<b>Region</b>								
Northeast	N/A	N/A	N/A	23%	18%	17%	21%	20%
South Central	N/A	N/A	N/A	27%	34%	32%	31%	33%
North Central	N/A	N/A	N/A	23%	25%	27%	24%	23%
West	N/A	N/A	N/A	28%	23%	23%	25%	25%

\*Ethnicity: Will not add to 100%, see page 239 for details.

# BIRD WATCHING: WHERE PARTICIPANTS LIVE\*

Seven percent of the population in each region participates in bird watching.

## Regional Profile



\* Percent of total in each region that are Bird Watchers

# BIRD WATCHING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Bird watchers participate in a variety of other outdoor activities with hiking being the most popular among this group in 2005.

## Crossover Activities

Activities	Bird Watching in 2003	Bird Watching In 2004	Bird Watching in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	13%	13%	15%	2,357,072
<b>Bicycling (Any Type)</b>	43%	45%	43%	6,793,444
Bicycling (Paved Road)	37%	42%	39%	6,092,913
<b>Bicycling (Mountain)</b>	30%	28%	33%	5,155,703
Bicycling (Single Track)	22%	22%	27%	4,215,951
Bicycling (Dirt Road)	23%	25%	25%	3,893,398
<b>Bird Watching</b>	100%	100%	100%	15,626,754
<b>Camping (Any Type)</b>	45%	37%	40%	6,242,053
Camping (Away from Car)	13%	11%	12%	1,884,877
Camping (Car)	32%	27%	30%	4,750,715
Canoeing	18%	19%	20%	3,168,382
<b>Climbing (Any Type)</b>	7%	6%	8%	1,186,197
Climbing (Artificial Wall)	4%	5%	6%	879,698
Climbing (Natural Rock)	3%	5%	3%	423,358
Climbing (Ice)	2%	2%	1%	178,265
Cross-Country/Nordic Skiing	8%	9%	8%	1,198,441
<b>Fishing (Any Type)</b>	N/A	47%	42%	6,514,569
Fishing (Fly)	13%	14%	12%	1,950,877
Fishing (Non-Fly)	N/A	45%	39%	6,066,200
Hiking	60%	63%	61%	9,494,905
<b>Kayaking (Any Type)</b>	8%	9%	10%	1,495,940
<b>Kayaking (Non-Whitewater)</b>	8%	8%	9%	1,440,487
Kayaking (Sit-On-Top)	4%	6%	8%	1,183,649
Kayaking (Tour/Sea)	4%	4%	4%	652,055
Kayaking (Whitewater)	1%	3%	2%	274,379
<b>Paddle sports (Any Type)</b>	23%	26%	29%	4,462,897
Rafting	7%	7%	8%	1,305,797
Snowshoeing	5%	7%	7%	1,025,600
Telemark Skiing	3%	4%	2%	242,792
Trail Running	24%	24%	27%	4,229,876



OUTDOOR RECREATION PARTICIPATION STUDY

# CLIMBING – NATURAL ROCK, ARTIFICIAL WALL, ICE

**“Have you gone climbing with a rope & harness on a natural rock surface outside?”**

**“Have you gone climbing with a rope & harness on an artificial climbing wall?”**

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

# CLIMBING: 9.2 MILLION PARTICIPANTS, 51 MILLION OUTINGS

## THE 2005 AMERICAN CLIMBER

- Primarily male and unmarried
- Young, mean age of 27
- Caucasian
- Likely to live in the Western region of the U.S.
- Also participate in bicycling (any type), hiking, camping (any type), trail running and fishing (non-fly)
- On average went on six outings in 2005
- Close to one-third limit their activity to only a single outing during the year

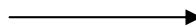
## MAJOR TRENDS IN CLIMBING

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

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

### Year 2005 Events of Note

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



### Observation/Implication

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

## CLIMBING: SUB-ACTIVITIES

**NATURAL ROCK CLIMBING: 5.0 MILLION PARTICIPANTS, 15 MILLION OUTINGS**  
**ARTIFICIAL WALL CLIMBING: 6.7 MILLION PARTICIPANTS, 34 MILLION OUTINGS**  
**ICE CLIMBING: 1.0 MILLION PARTICIPANTS**

### THE 2005 AMERICAN NATURAL ROCK CLIMBER

- Primarily male & unmarried
- Young, mean age of 28
- Likely to live in the Western part of the U.S.
- About half (52%) of natural rock climbers also went artificial wall climbing in 2005—17% also went ice climbing

### MAJOR TRENDS IN NATURAL ROCK CLIMBING

Participation in natural rock climbing has remained relatively consistent over the past eight years with around 5 million Americans 16 and older participating.

- Gender: Males outnumber females in this activity nearly five to one.
- Age: Over half (54%) of natural rock climbers are 16 to 24 years of age, and another nearly one-quarter (22%) are between 25 and 34 years old.
- Ethnicity: Nearly three-quarters of 2005 natural rock climbers are Caucasian and 11% are Hispanic.

#### Year 2005 Event of Note:

Males dominate the natural rock climbing sport, but outings are on the decline.

#### Observation/Implication

Focus on encouraging repeat outings by young males.

### THE 2005 AMERICAN ARTIFICIAL WALL CLIMBER

- Primarily male & unmarried
- Young, mean age of 26
- Likely to live in the Western region of the U.S.
- Over one-third (39%) of artificial wall climbers also went natural rock climbing in 2005—11% also went ice climbing

### MAJOR TRENDS IN ARTIFICIAL WALL CLIMBING

Participation in artificial wall climbing has fluctuated some over the past five years, but reports in 2005 put it at its second-highest level of participation over this time with 6.7 million Participants.

- Gender: Males outnumber females in this activity nearly two to one.
- Age: Over half (59%) of artificial wall climbers are 16 to 24 years of age, and another nearly one-quarter (21%) are between 25 and 34 years old.

#### Year 2005 Event of Note:

More females participate in this activity than in natural rock climbing.

#### Observation/Implication

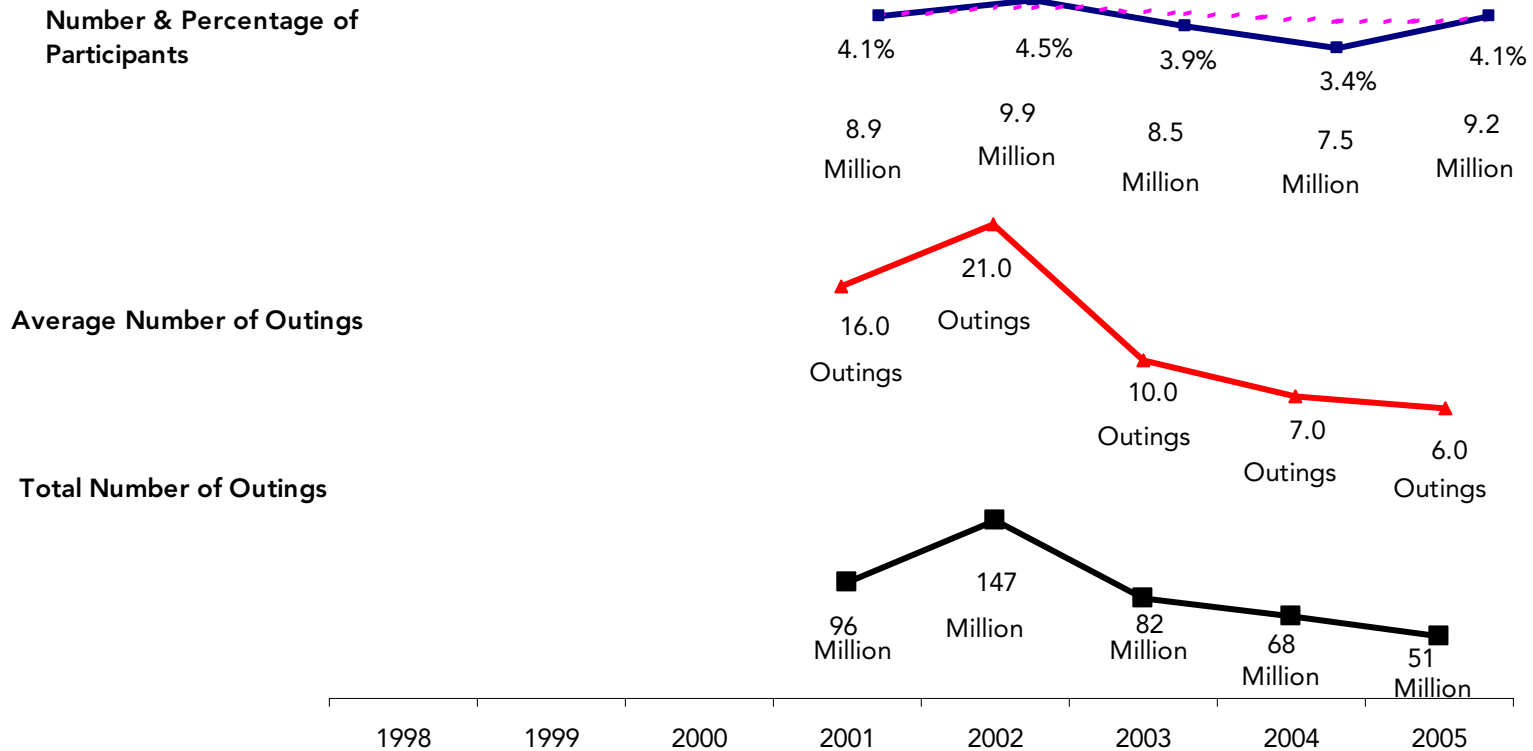
Although this activity is predominantly male, do not exclude females as key participants.

\*Sample size among ice climbers too small to present detailed analysis.

# CLIMBING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

During the past five years, the number of total outings generated by Americans 16 and older who went climbing peaked in 2002 when the average number of outings equaled a five-year high of 21—pushing the total number of outings to 208 million.

Over the past four years the number of Americans participating in climbing has remained relatively stable at close to 9 million. The average number of outings, however, has gradually fallen in the past two years to a low of only six outings per Participant in 2005—dropping total outings in 2005 to 55 million.



..... Rolling Trend Average

\*Total Outings are calculated by summing Natural Rock, Artificial Wall and Ice Climbing outings.

# CLIMBING: FREQUENCY OF PARTICIPATION

During 2005, climbing Participants averaged six outings—yielding a one-year decrease of 15 million total outings (37 million in 2005) from the previous year (52 million).

The proportion of climbers who make three-to-six outings per year has risen over the past five years from 22% in 2001 to 35% in 2005. However, the proportion of climbers who climb 11 or more times per year has declined over this period—significantly over the past two years—from 25% in 2001 to only 9% in 2005.

### Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	N/A	N/A	N/A	28%	21%	21%	23%	31%
2 times	N/A	N/A	N/A	14%	24%	16%	15%	18%
3 to 6 times	N/A	N/A	N/A	22%	27%	32%	34%	35%
7 to 10 times	N/A	N/A	N/A	11%	5%	13%	11%	7%
<b>11 or more times (NET)</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>25%</b>	<b>22%</b>	<b>18%</b>	<b>16%</b>	<b>9%</b>
11 to 30	N/A	N/A	N/A	14%	12%	12%	14%	7%
31 or more times	N/A	N/A	N/A	11%	11%	6%	2%	2%
<b>Average Frequency</b>	<b>0.0</b>	<b>0.0</b>	<b>0.0</b>	<b>16.0</b>	<b>21.0</b>	<b>10.0</b>	<b>7.0</b>	<b>6.0</b>
<b>Total Outings (Millions)</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>96</b>	<b>147</b>	<b>82</b>	<b>68</b>	<b>51</b>

  = Significant difference from 2003

# CLIMBING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

The 2005 climbing Participant population is comprised primarily of younger, male and unmarried Americans. In 2001 males outnumbered females in this sport nearly two to one; in 2005 males outnumbered females nearly three to one. Most (79%) 2005 climbing Participants are between the ages of 16 and 34 years old and 62% are unmarried. They are also most likely to live in the Western region of the U.S.

## Demographic Profile

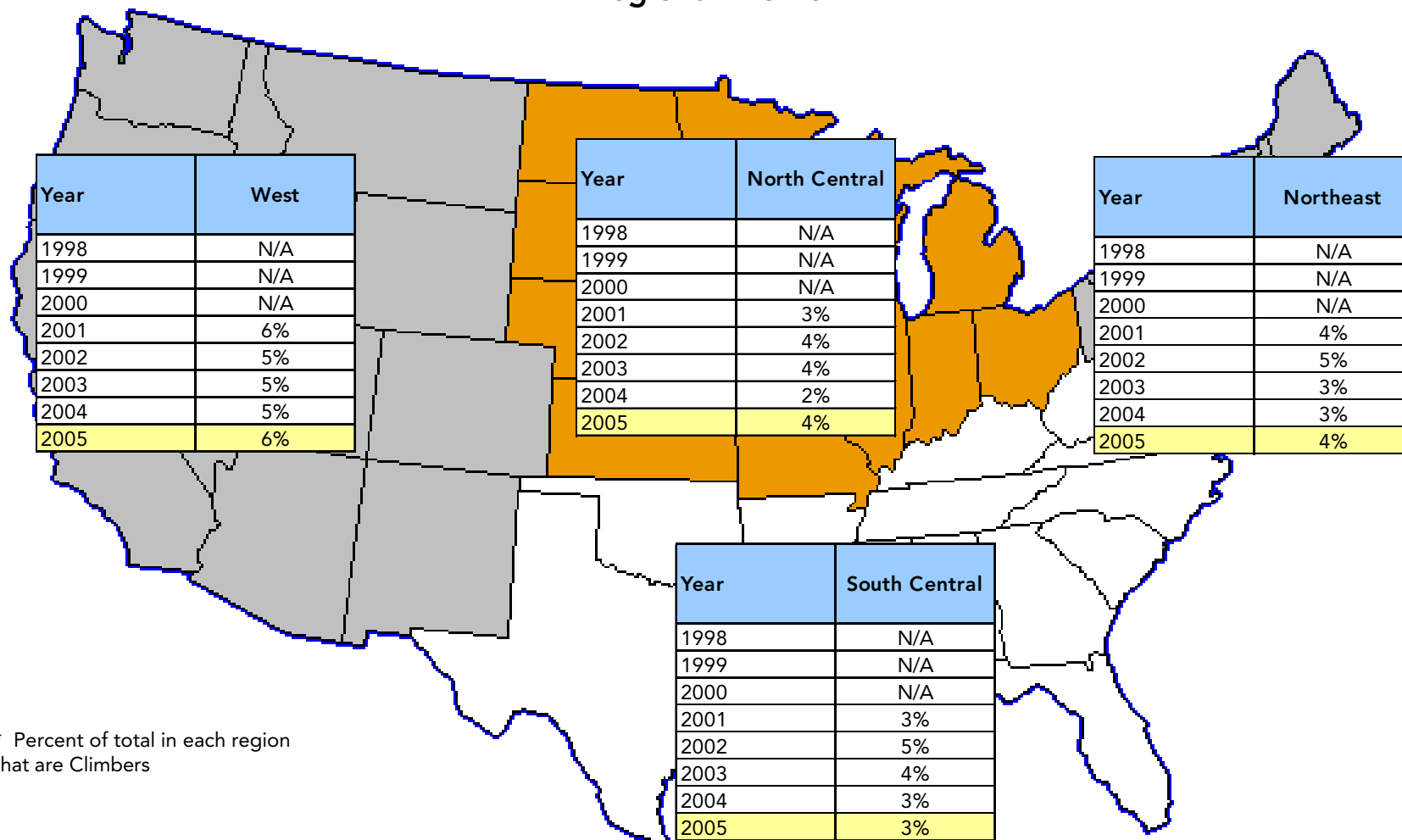
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	N/A	N/A	N/A	65%	68%	68%	70%	73%
Female	N/A	N/A	N/A	35%	32%	32%	30%	27%
<b>Age</b>								
16 to 24	N/A	N/A	N/A	55%	48%	52%	65%	56%
25 to 34	N/A	N/A	N/A	22%	18%	29%	18%	23%
35 to 44	N/A	N/A	N/A	15%	21%	13%	12%	14%
45+	N/A	N/A	N/A	8%	14%	7%	5%	7%
<b>Marital Status</b>								
Married	N/A	N/A	N/A	31%	34%	30%	33%	37%
Unmarried	N/A	N/A	N/A	69%	66%	70%	67%	62%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	76%	80%	71%
African-American	N/A	N/A	N/A	N/A	N/A	6%	5%	11%
Hispanic	N/A	N/A	N/A	N/A	N/A	8%	12%	10%
Asian	N/A	N/A	N/A	N/A	N/A	6%	2%	3%
Other	N/A	N/A	N/A	N/A	N/A	9%	9%	12%
<b>Children &lt;18</b>								
Yes	N/A	N/A	N/A	44%	52%	56%	50%	56%
<b>Household Income</b>								
<\$40k	N/A	N/A	N/A	41%	34%	34%	34%	26%
\$40k - \$79k	N/A	N/A	N/A	39%	30%	45%	39%	46%
\$80k+	N/A	N/A	N/A	20%	36%	21%	27%	28%
<b>Region</b>								
Northeast	N/A	N/A	N/A	18%	20%	16%	18%	17%
South Central	N/A	N/A	N/A	28%	36%	34%	31%	27%
North Central	N/A	N/A	N/A	16%	19%	23%	16%	20%
West	N/A	N/A	N/A	38%	25%	27%	34%	36%

\*Ethnicity: Will not add to 100%, see page 239 for details.

# CLIMBING: WHERE PARTICIPANTS LIVE\*

Among those living in the Western region of the U.S., 6% are climbers compared to 4% among the national population.

## Regional Profile



\* Percent of total in each region that are Climbers

# CLIMBING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Other activities that climbing Participants are most likely to also have participated in during 2005 include bicycling (any type), hiking, camping (any type), trail running and fishing (non-fly).

## Crossover Activities

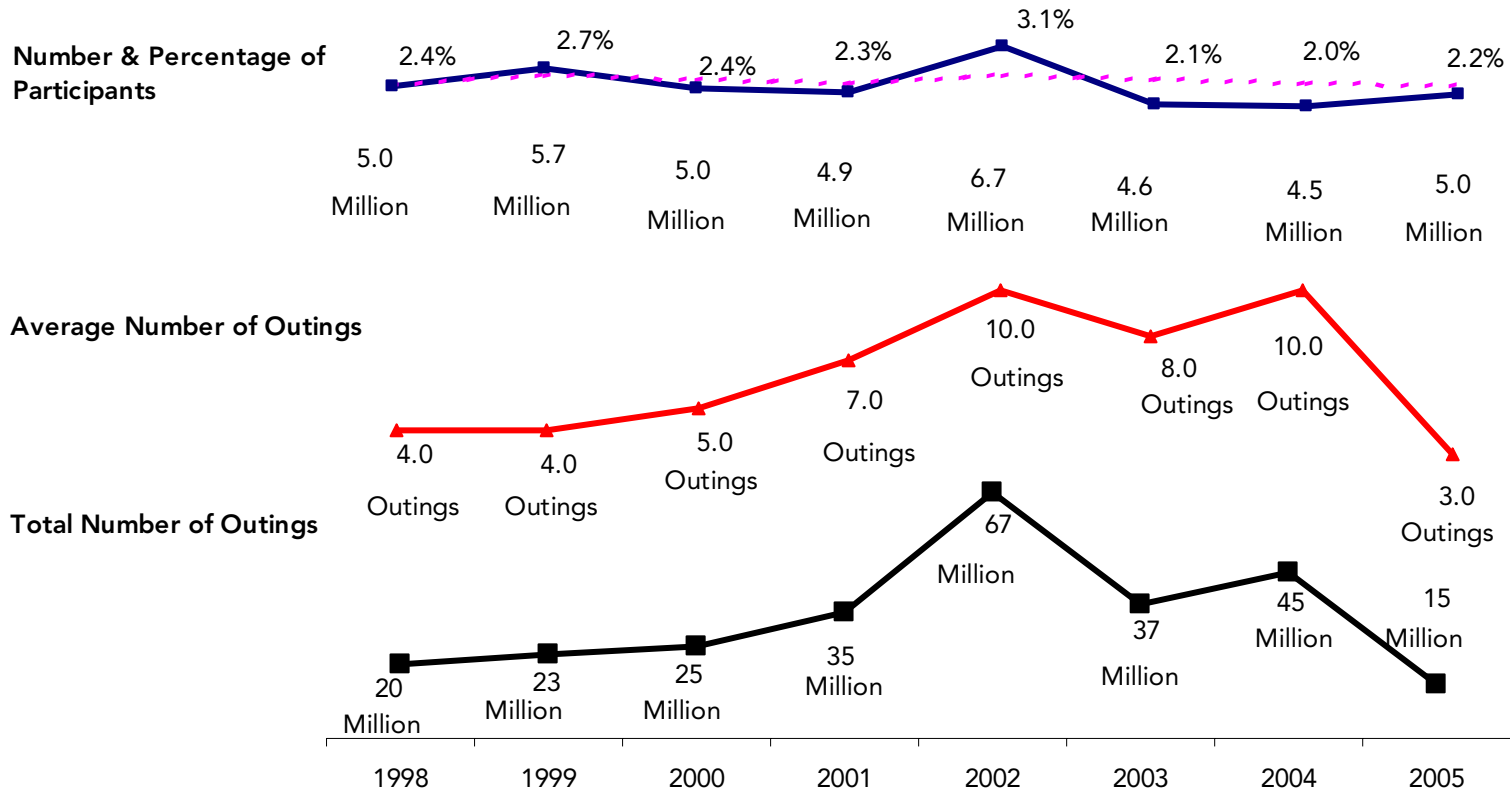
Activities	Climbing in 2003	Climbing In 2004	Climbing in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	29%	27%	29%	2,703,617
<b>Bicycling (Any Type)</b>	70%	67%	71%	6,573,799
Bicycling (Paved Road)	61%	56%	63%	5,781,145
<b>Bicycling (Mountain)</b>	54%	58%	54%	4,967,361
Bicycling (Single Track)	47%	51%	48%	4,383,649
Bicycling (Dirt Road)	42%	48%	44%	4,071,197
Bird Watching	12%	12%	13%	1,186,197
<b>Camping (Any Type)</b>	64%	69%	64%	5,878,318
Camping (Away from Car)	37%	34%	30%	2,795,704
Camping (Car)	30%	36%	35%	3,256,318
Canoeing	30%	39%	20%	1,862,377
<b>Climbing (Any Type)</b>	100%	100%	100%	9,218,217
Climbing (Artificial Wall)	75%	68%	73%	6,713,938
Climbing (Natural Rock)	54%	61%	54%	5,020,796
Climbing (Ice)	8%	14%	11%	1,013,310
Cross-Country/Nordic Skiing	12%	15%	11%	983,208
<b>Fishing (Any Type)</b>	N/A	61%	50%	4,579,536
Fishing (Fly)	17%	18%	11%	1,020,752
Fishing (Non-Fly)	N/A	58%	49%	4,499,359
Hiking	73%	78%	69%	6,395,537
<b>Kayaking (Any Type)</b>	23%	22%	17%	1,539,026
<b>Kayaking (Non-Whitewater)</b>	20%	18%	16%	1,458,849
Kayaking (Sit-On-Top)	16%	13%	9%	818,292
Kayaking (Tour/Sea)	10%	12%	11%	1,021,281
Kayaking (Whitewater)	4%	11%	2%	208,412
<b>Paddle sports (Any Type)</b>	44%	54%	41%	3,778,095
Rafting	17%	24%	20%	1,889,021
Snowshoeing	6%	11%	11%	1,001,980
Telemark Skiing	10%	9%	3%	245,093
Trail Running	57%	60%	63%	5,769,135

   = Significant difference from 2003



# NATURAL ROCK CLIMBING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

Participation in natural rock climbing has remained consistent over the past eight years with around 5 million Americans 16 and older participating. Until 2005, the average number of outings was on the rise from four in 1998 to a peak of ten in 2004. In 2005, average outings per Participant dropped to only three. Since participation has remained relatively constant, total outings has fluctuated evenly with the average number of outings. The total number of outings peaked in 2002 at 67 million, but has fallen by 52 million outings since then to 15 million in 2005.



..... Rolling Trend Average

# NATURAL ROCK CLIMBING: FREQUENCY OF PARTICIPATION

During 2005, natural rock climbing Participants averaged three outings, a one-year decrease of 30 million total outings (15 million in 2005) from 2004 (45 million).

The natural rock climbing population has historically been comprised of a significant percentage of Participants who go on only one outing per year—and this statistic is on the rise with 48% in 2005. Further, this activity has seen a decline over the past five years in Participants going out 11 or more times per year.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	37%	39%	47%	40%	38%	30%	35%	48%
2 times	22%	25%	21%	0%	24%	26%	22%	21%
3 to 6 times	28%	26%	19%	25%	17%	23%	23%	19%
7 to 10 times	7%	3%	2%	13%	6%	6%	8%	5%
11 or more times (NET)	6%	7%	11%	22%	15%	15%	12%	6%
11 to 30	6%	6%	8%	18%	10%	9%	9%	6%
31 or more times	0%	1%	3%	3%	5%	6%	3%	0%
<b>Average Frequency</b>	<b>4.0</b>	<b>4.0</b>	<b>5.0</b>	<b>7.0</b>	<b>10.0</b>	<b>8.0</b>	<b>10.0</b>	<b>3.0</b>
<b>Total Outings (Millions)</b>	<b>20</b>	<b>23</b>	<b>25</b>	<b>35</b>	<b>67</b>	<b>37</b>	<b>45</b>	<b>15</b>

  = Significant difference from 2003

# NATURAL ROCK CLIMBING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

The 2005 natural rock climbing Participant population is comprised primarily of younger, unmarried and male Americans. Over four-fifths of Participants (83%) are male, nearly two-thirds (63%) are unmarried, and over three-quarters (76%) are between the ages of 16 and 34 years old. The 2005 natural rock climber is also most likely to live in the Western region of the U.S.

## Demographic Profile

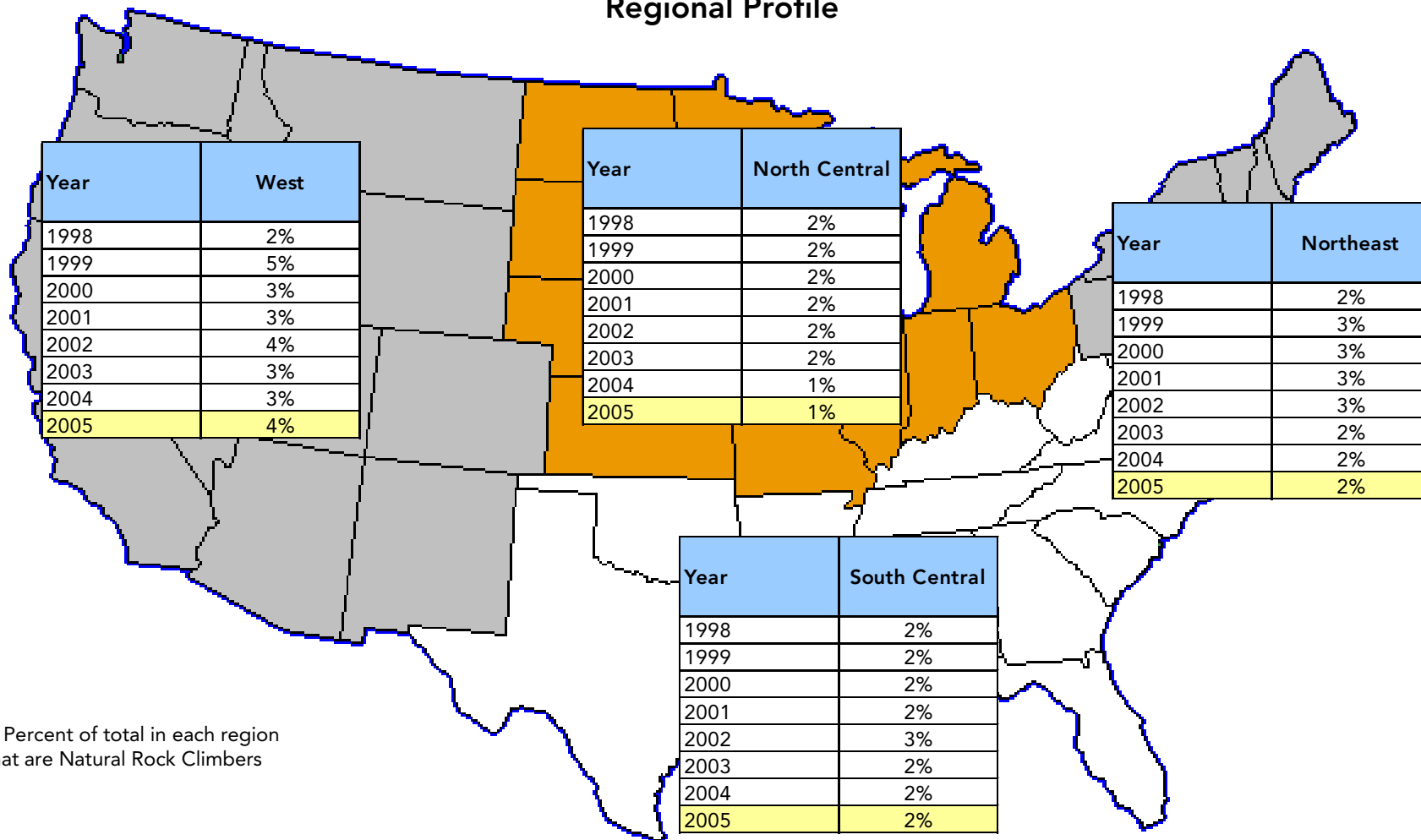
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	67%	68%	61%	65%	72%	76%	76%	83%
Female	33%	32%	39%	35%	28%	24%	24%	17%
<b>Age</b>								
16 to 24	51%	44%	52%	52%	46%	47%	69%	54%
25 to 34	26%	22%	22%	23%	20%	32%	17%	22%
35 to 44	13%	22%	17%	13%	17%	12%	10%	13%
45+	9%	13%	9%	12%	18%	9%	3%	10%
<b>Marital Status</b>								
Married	26%	29%	31%	33%	36%	29%	34%	37%
Unmarried	74%	71%	69%	67%	63%	71%	66%	63%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	73%	76%	71%
African-American	N/A	N/A	N/A	N/A	N/A	7%	6%	6%
Hispanic	N/A	N/A	N/A	N/A	N/A	9%	15%	11%
Asian	N/A	N/A	N/A	N/A	N/A	8%	3%	6%
Other	N/A	N/A	N/A	N/A	N/A	10%	11%	13%
<b>Children &lt;18</b>								
Yes	33%	49%	51%	36%	51%	49%	47%	46%
<b>Household Income</b>								
<\$40k	N/A	44%	44%	49%	37%	32%	34%	26%
\$40k - \$79k	N/A	41%	47%	32%	27%	49%	37%	42%
\$80k+	N/A	15%	8%	19%	35%	19%	29%	32%
<b>Region</b>								
Northeast	17%	16%	20%	23%	19%	14%	16%	17%
South Central	26%	21%	27%	30%	35%	39%	32%	29%
North Central	28%	18%	20%	16%	15%	19%	14%	10%
West	30%	45%	34%	31%	30%	28%	37%	44%

\*Ethnicity: Will not add to 100%, see page 239 for details.

# NATURAL ROCK CLIMBING: WHERE PARTICIPANTS LIVE\*

The Western region of the U.S. has the greatest percentage of natural rock climbers among the U.S. population with 4% of Westerners participating compared to 2% of the national population.

## Regional Profile



\* Percent of total in each region that are Natural Rock Climbers

# NATURAL ROCK CLIMBING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Other activities that natural rock climbing Participants are most likely to also have participated in during 2005 include hiking, camping (any type), bicycling (any type), trail running and fishing (non-fly).

## Crossover Activities

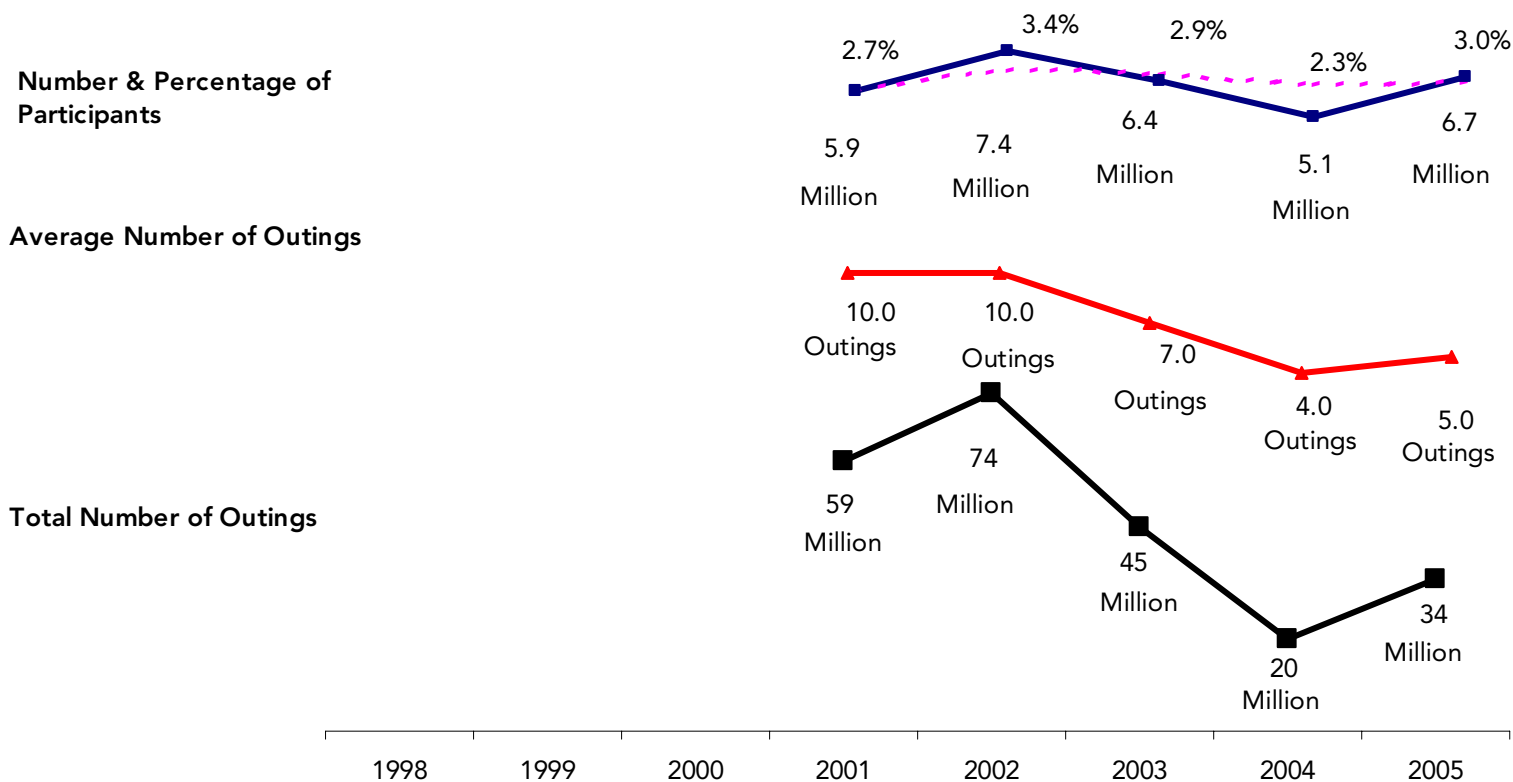
Activities	Natural Rock Climbing in 2003	Natural Rock Climbing In 2004	Natural Rock Climbing in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	42%	37%	36%	1,807,487
<b>Bicycling (Any Type)</b>	67%	66%	69%	3,483,788
Bicycling (Paved Road)	55%	53%	59%	2,974,301
<b>Bicycling (Mountain)</b>	56%	64%	55%	2,774,959
Bicycling (Single Track)	53%	59%	49%	2,468,460
Bicycling (Dirt Road)	42%	54%	44%	2,192,690
Bird Watching	12%	15%	8%	423,358
<b>Camping (Any Type)</b>	69%	79%	76%	3,797,683
Camping (Away from Car)	47%	46%	41%	2,050,245
Camping (Car)	28%	36%	37%	1,859,736
Canoeing	34%	45%	17%	847,578
<b>Climbing (Any Type)</b>	100%	100%	100%	5,020,796
Climbing (Artificial Wall)	62%	53%	52%	2,633,376
Climbing (Natural Rock)	100%	100%	100%	5,020,796
Climbing (Ice)	11%	15%	17%	871,727
Cross-Country/Nordic Skiing	13%	20%	12%	583,713
<b>Fishing (Any Type)</b>	N/A	70%	63%	3,164,183
Fishing (Fly)	25%	24%	17%	837,064
Fishing (Non-Fly)	N/A	69%	61%	3,084,005
Hiking	82%	88%	78%	3,935,570
<b>Kayaking (Any Type)</b>	24%	30%	17%	848,969
<b>Kayaking (Non-Whitewater)</b>	22%	25%	17%	848,969
Kayaking (Sit-On-Top)	16%	20%	7%	344,042
Kayaking (Tour/Sea)	14%	17%	15%	768,791
Kayaking (Whitewater)	3%	17%	3%	128,234
<b>Paddle sports (Any Type)</b>	50%	61%	38%	1,925,703
Rafting	22%	31%	18%	897,026
Snowshoeing	6%	11%	9%	434,733
Telemark Skiing	12%	11%	3%	164,916
Trail Running	56%	62%	67%	3,378,305

= Significant difference from 2003

# ARTIFICIAL WALL CLIMBING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

Participation in artificial wall climbing has fluctuated some over the past five years. It peaked in 2002 with 7.4 million Americans age 16 and older participating. Participation dropped to its lowest (5.1 million) in 2004, but 2005 reflects a resurgence in Participation with 6.7 million Americans participating.

Although participation is high, the average number of outings by artificial wall climbers has dropped from 12 outings in 2001 to only five in 2005. The total number of outings has mirrored this drop to 34 million per year.



..... Rolling Trend Average

# ARTIFICIAL WALL CLIMBING: FREQUENCY OF PARTICIPATION

During 2005 artificial wall climbing Participants averaged five outings—yielding a one-year increase of 14 million total outings (34 million in 2005) from the previous year (20 million).

Like natural rock climbing, the artificial wall climbing population has historically been comprised of a significant percentage of Participants who go on only one outing per year (45% in 2005). Also like natural rock climbing, this activity has seen a decline over the past five years in Participants going out 11 or more times per year.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	N/A	N/A	N/A	35%	35%	37%	34%	45%
2 times	N/A	N/A	N/A	25%	28%	15%	22%	19%
3 to 6 times	N/A	N/A	N/A	16%	17%	26%	28%	28%
7 to 10 times	N/A	N/A	N/A	7%	5%	9%	9%	2%
11 or more times (NET)	N/A	N/A	N/A	17%	15%	13%	6%	6%
11 to 30	N/A	N/A	N/A	7%	7%	9%	6%	4%
31 or more times	N/A	N/A	N/A	10%	8%	4%	0%	2%
<b>Average Frequency</b>	N/A	N/A	N/A	10.0	10.0	7.0	4.0	5.0
<b>Total Outings (Millions)</b>	N/A	N/A	N/A	59	74	45	20	34

# ARTIFICIAL WALL CLIMBING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

The 2005 artificial wall climbing Participant population is comprised primarily of younger, unmarried and male Americans. Nearly two-thirds of Participants (65%) are male or unmarried (62%), and four-fifths (80%) are between the ages of 16 and 34 years old. The 2005 artificial wall climber is also most likely to live in the Western region of the U.S.

## Demographic Profile

Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	N/A	N/A	N/A	64%	65%	65%	62%	65%
Female	N/A	N/A	N/A	36%	35%	35%	38%	35%
<b>Age</b>								
16 to 24	N/A	N/A	N/A	60%	52%	62%	69%	59%
25 to 34	N/A	N/A	N/A	21%	17%	20%	17%	21%
35 to 44	N/A	N/A	N/A	14%	18%	14%	9%	14%
45+	N/A	N/A	N/A	5%	12%	5%	5%	6%
<b>Marital Status</b>								
Married	N/A	N/A	N/A	29%	32%	24%	26%	36%
Unmarried	N/A	N/A	N/A	71%	67%	76%	74%	62%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	74%	87%	69%
African-American	N/A	N/A	N/A	N/A	N/A	9%	3%	15%
Hispanic	N/A	N/A	N/A	N/A	N/A	8%	12%	9%
Asian	N/A	N/A	N/A	N/A	N/A	8%	2%	4%
Other	N/A	N/A	N/A	N/A	N/A	8%	4%	10%
<b>Children &lt;18</b>								
Yes	N/A	N/A	N/A	47%	54%	60%	54%	59%
<b>Household Income</b>								
<\$40k	N/A	N/A	N/A	44%	33%	36%	36%	28%
\$40k - \$79k	N/A	N/A	N/A	36%	30%	41%	35%	48%
\$80k+	N/A	N/A	N/A	20%	37%	23%	29%	24%
<b>Region</b>								
Northeast	N/A	N/A	N/A	20%	22%	18%	21%	17%
South Central	N/A	N/A	N/A	25%	30%	35%	31%	26%
North Central	N/A	N/A	N/A	15%	22%	24%	17%	23%
West	N/A	N/A	N/A	40%	26%	24%	32%	34%

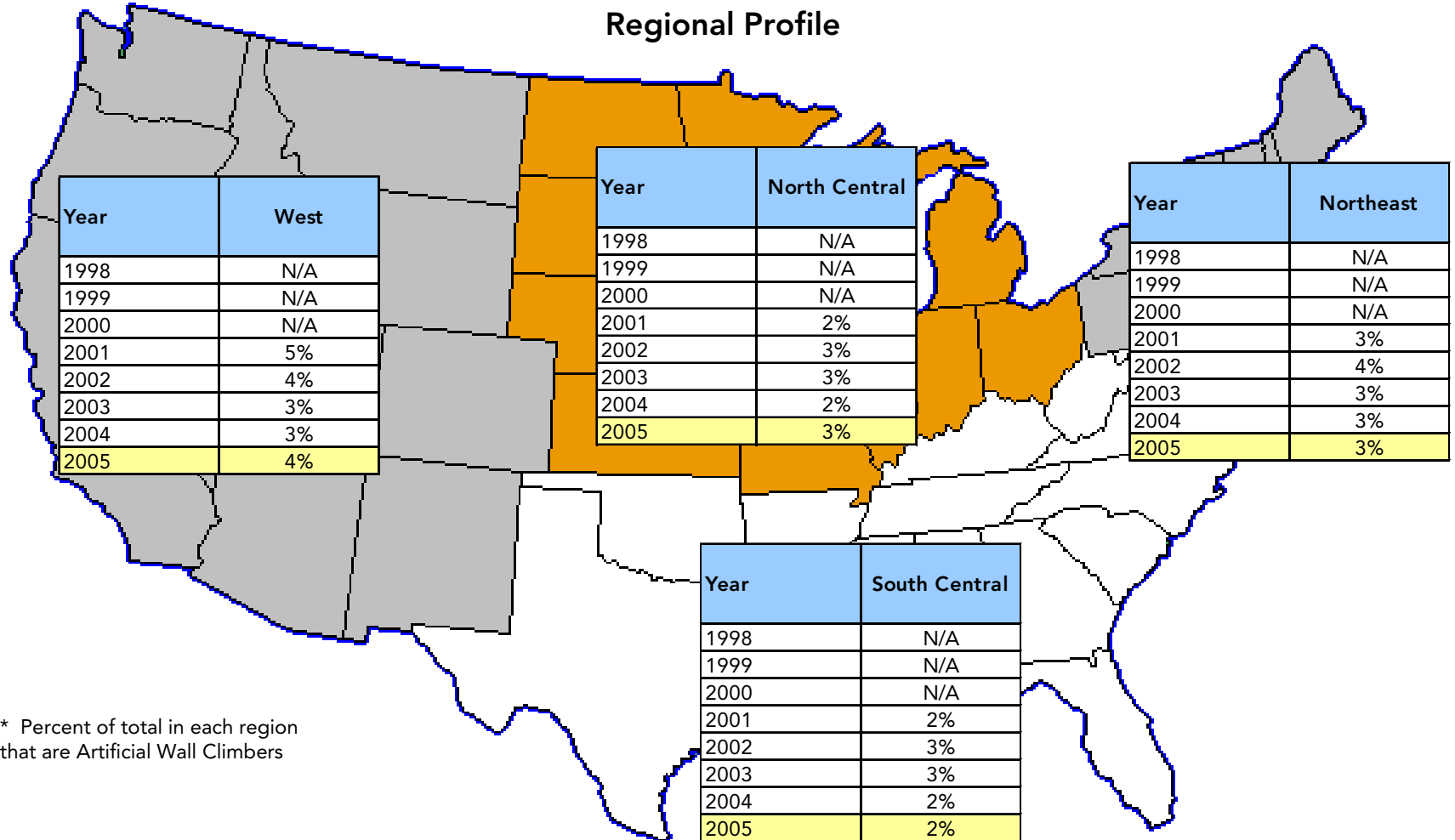
\*Ethnicity: Will not add to 100%, see page 239 for details.   = Significant difference from 2003



# ARTIFICIAL WALL CLIMBING: WHERE PARTICIPANTS LIVE\*

The Western region of the U.S. has the greatest percentage of artificial wall climbers among the U.S. population with 4% of Westerners participating compared to 3% of the national population.

## Regional Profile



\* Percent of total in each region that are Artificial Wall Climbers

# ARTIFICIAL WALL CLIMBING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Other activities that artificial wall climbers are most likely to also have participated in during 2005 include bicycling (any type), hiking, trail running and camping (any type). This year sees a significant decrease compared to 2003 in the proportion of artificial wall climbers who also canoe and Telemark ski.

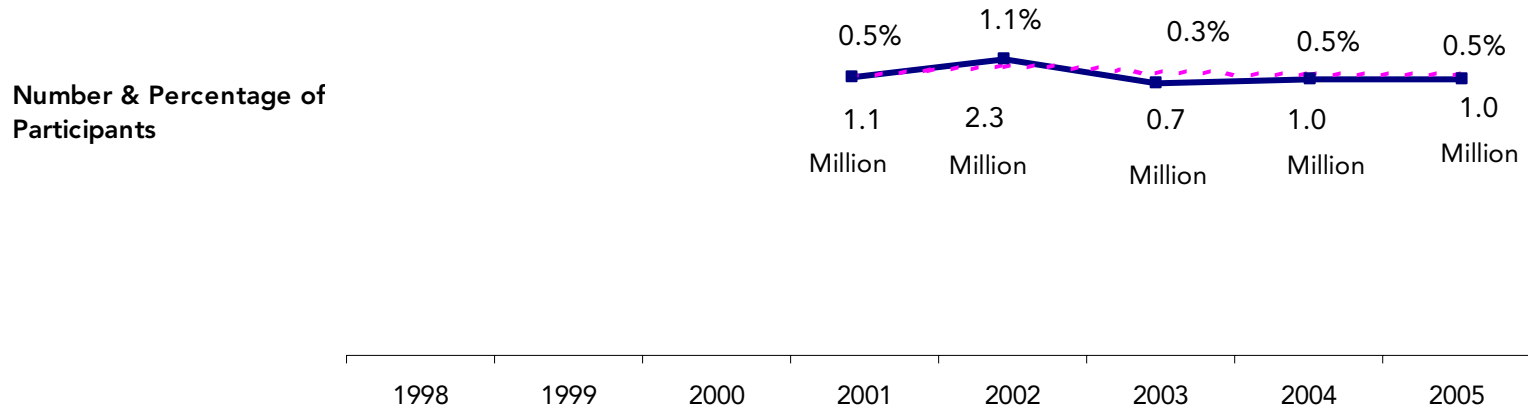
## Crossover Activities

Activities	Artificial Wall Climbing in 2003	Artificial Wall Climbing in 2004	Artificial Wall Climbing in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	25%	30%	24%	1,641,093
<b>Bicycling (Any Type)</b>	71%	72%	70%	4,701,289
Bicycling (Paved Road)	65%	63%	64%	4,308,660
<b>Bicycling (Mountain)</b>	55%	60%	53%	3,587,873
Bicycling (Single Track)	49%	54%	47%	3,182,425
Bicycling (Dirt Road)	42%	52%	48%	3,193,801
Bird Watching	10%	14%	13%	879,698
<b>Camping (Any Type)</b>	64%	69%	56%	3,779,486
Camping (Away from Car)	36%	34%	26%	1,772,162
Camping (Car)	31%	38%	32%	2,148,907
Canoeing	33%	43%	20%	1,358,841
<b>Climbing (Any Type)</b>	100%	100%	100%	6,713,938
Climbing (Artificial Wall)	100%	100%	100%	6,713,938
Climbing (Natural Rock)	45%	48%	39%	2,633,376
Climbing (Ice)	7%	12%	11%	725,583
Cross-Country/Nordic Skiing	12%	17%	10%	657,937
<b>Fishing (Any Type)</b>	N/A	53%	46%	3,120,158
Fishing (Fly)	13%	20%	11%	743,538
Fishing (Non-Fly)	N/A	49%	46%	3,120,158
Hiking	69%	82%	66%	4,427,775
<b>Kayaking (Any Type)</b>	24%	26%	18%	1,237,089
<b>Kayaking (Non-Whitewater)</b>	20%	22%	17%	1,156,911
Kayaking (Sit-On-Top)	18%	16%	10%	657,937
Kayaking (Tour/Sea)	8%	14%	12%	799,521
Kayaking (Whitewater)	5%	13%	3%	208,412
<b>Paddle sports (Any Type)</b>	45%	58%	44%	2,972,622
Rafting	15%	24%	23%	1,557,798
Snowshoeing	7%	13%	11%	750,934
Telemark Skiing	12%	11%	2%	141,583
Trail Running	60%	68%	62%	4,149,644

= Significant difference from 2003

# ICE CLIMBING\*: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

Participation in ice climbing has remained constant over the past five years at about 1 million Americans age 16 and older. It peaked in 2002 with 2.3 million participating, then dropped to its lowest in this five-year period (0.7 million) in 2003. The last two years reflect resumption in Participation with 1.0 million Americans participating.



..... Rolling Trend Average

\*Sample size too small to show detailed data

OUTDOOR RECREATION PARTICIPATION STUDY

# FISHING – FLY-FISHING, FISHING (NON-FLY)

“Have you gone fishing?

Have you gone fly-fishing? That is fishing with a rod and reel specifically designed for fly-fishing.

*Please consider that fly-fishing is different than spin-cast fishing where you might use live bait.*

Have you participated in any type of fishing OTHER than fly-fishing?”

# FISHING: 77.3 MILLION PARTICIPANTS, 1.1 BILLION OUTINGS

## THE 2005 AMERICAN FISHING PARTICIPANT

- Primarily male
- Mean age of 37
- Caucasian
- Likely to live in the South Central region of the U.S.
- Staying active when not fishing by participating in camping (any type), bicycling (any type) and hiking
- Went on 14 outings on average in 2005
- Twenty-nine percent of fishing participants made 11 or more outings.

## MAJOR TRENDS IN FISHING

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

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

### Year 2005 Events of Note

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

### Observation/Implication

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



## FISHING: SUB-ACTIVITIES

**FLY FISHING: 14.7 MILLION PARTICIPANTS, 117 MILLION OUTINGS**

**NON-FLY FISHING: 74.2 MILLION PARTICIPANTS, 1.0 BILLION OUTINGS**

### THE 2005 AMERICAN FLY FISHING PARTICIPANT

- Primarily male
- Mean age of 37
- Likely to live in the Western part of the U.S.
- Averaged eight outings in 2005
- Most (80%) also went non-fly fishing in 2005

### MAJOR TRENDS IN FLY FISHING

Participation in fly fishing has grown over the past five years with 14.7 million Americans 16 and older participating in 2005. Average number of outings, however, is on the decline with only eight fly fishing trips per Participant in 2005.

- Gender: Males outnumber females in this activity three to one.
- Age: Participants are both young and old; nearly one-third (30%) of fly fishing Participants are either 16 to 24 years of age or 45 years and older.
- Ethnicity: The fly fishing population is primarily Caucasian (80%); 11% are Hispanic.

#### Year 2005 Event of Note

More Americans are trying fly-fishing, but frequency of outings has declined.

#### Observation/Implication

The decline in average outings may be a result of newcomers to the sport. Encouraging newcomer participation in this sport may help get them on the water more often.

### THE 2005 AMERICAN NON-FLY FISHING PARTICIPANT

- Primarily male
- Participation among all ages, mean age of 37
- Likely to live in the South Central region of the U.S.
- Averaged 13 outings in 2005
- Only a few (16%) also went fly fishing in 2005

### MAJOR TRENDS IN NON-FLY FISHING

Non-fly fishing is the most popular form of fishing and draws an impressive 74.2 million Participants.

- Gender: Males outnumber females in this activity nearly two to one.
- Age: The non-fly fishing sport sees participation across all age levels.
- Ethnicity: Over eight in ten (81%) of 2005 non-fly fishing Participants are Caucasian and 10% are Hispanic.
- Region: Non-fly fishing Participants are most likely to live in the South Central region of the U.S.

#### Year 2005 Event of Note

The non-fly fishing sport offers something for every age.

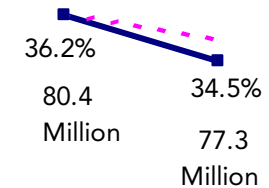
#### Observation/Implication

It is an excellent cross-generational activity that can bring grandparents, parents and children together in the outdoors.

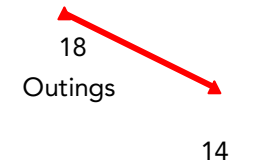
# FISHING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

The number of total outings generated by Americans 16 and older who went fishing in 2005 (1.1 billion) dropped slightly compared to 2004 numbers (1.4 billion). This drop is partly due to a decline of 3.1 million Participants as well as a decline in average outings per Participant from 18 to 14 between the two years.

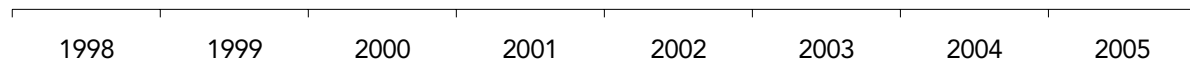
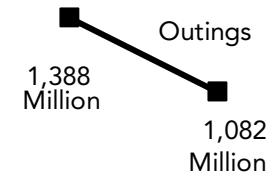
Number & Percentage of Participants



Average Number of Outings



Total Number of Outings



..... Rolling Trend Average

\*Total Outings are calculated by summing Fly Fishing and Fishing (Non Fly) outings.

# FISHING: FREQUENCY OF PARTICIPATION

During 2005 fishing Participants averaged 14 outings—a significant decrease from an average of 18 outings in 2004—yielding a one-year decrease of 0.3 billion outings (1.1 billion in 2005) from the previous year (1.4 billion).

Nearly one-third (29%) of fishing Participants made 11 or more fishing outings in 2005, while slightly more than that (32%) went fishing three to six times.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	N/A	N/A	N/A	N/A	N/A	N/A	11%	14%
2 times	N/A	N/A	N/A	N/A	N/A	N/A	13%	15%
3 to 6 times	N/A	N/A	N/A	N/A	N/A	N/A	30%	32%
7 to 10 times	N/A	N/A	N/A	N/A	N/A	N/A	12%	10%
<b>11 or more times (NET)</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>34%</b>	<b>29%</b>
11 to 15 times	N/A	N/A	N/A	N/A	N/A	N/A	10%	8%
16 to 20 times	N/A	N/A	N/A	N/A	N/A	N/A	5%	6%
21 to 30 times	N/A	N/A	N/A	N/A	N/A	N/A	6%	6%
31 to 50 times	N/A	N/A	N/A	N/A	N/A	N/A	6%	4%
51 or more times	N/A	N/A	N/A	N/A	N/A	N/A	7%	5%
<b>Average Frequency</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>18.0</b>	<b>14.0</b>
<b>Total Outings (Millions)</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>1,388</b>	<b>1,082</b>

\*Total Outings are calculated by summing Fly Fishing and Fishing (Non Fly) outings.   = Significant difference from 2004



# FISHING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

Males outnumber females in the 2005 fishing Participant population two to one, and their ages are distributed across the board. Most (81%) 2005 fishing Participants are Caucasian and about half (52%) have children. While they are distributed across the U.S. they are most likely to live in the South Central region.

## Demographic Profile

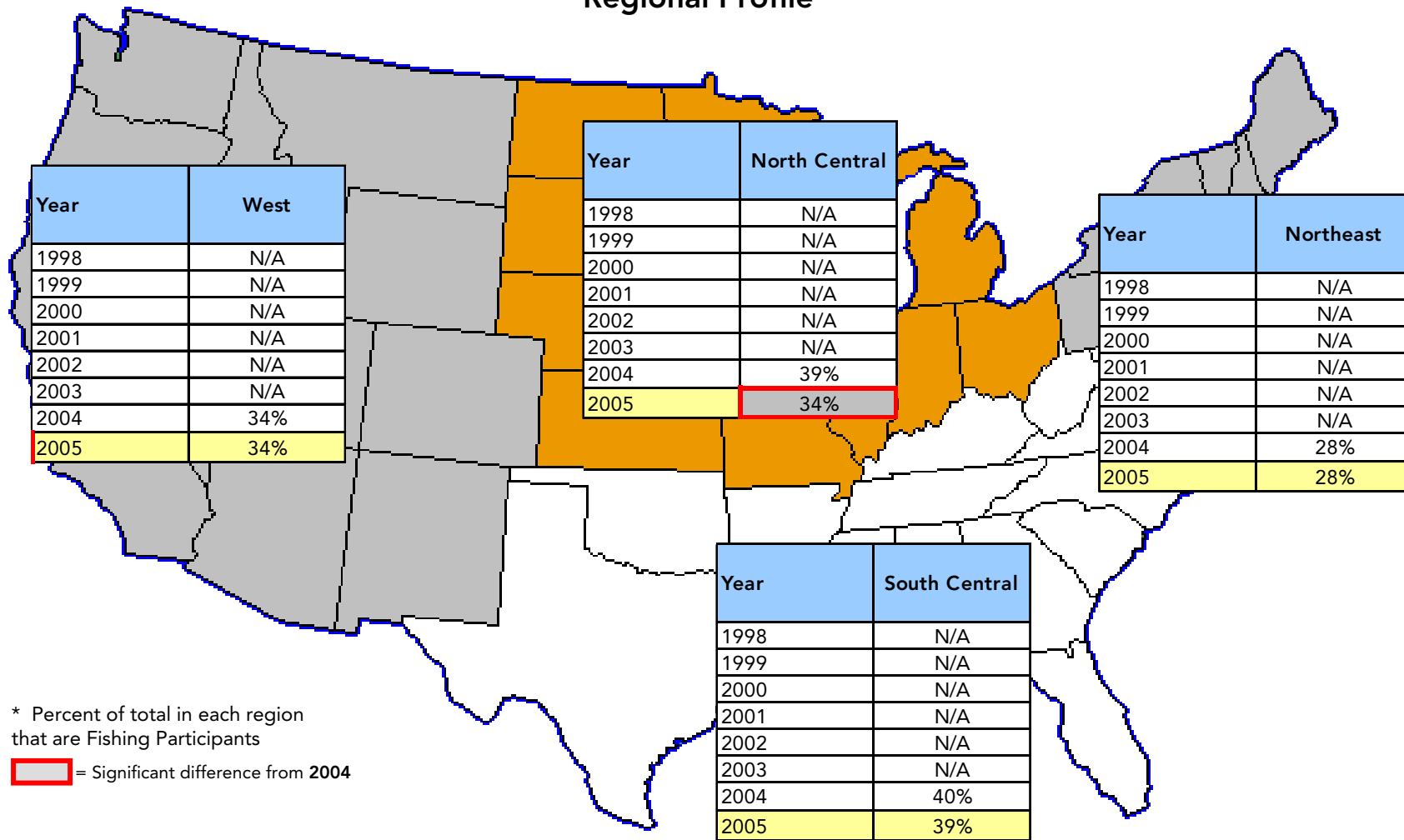
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	N/A	N/A	N/A	N/A	N/A	N/A	64%	66%
Female	N/A	N/A	N/A	N/A	N/A	N/A	36%	34%
<b>Age</b>								
16 to 24	N/A	N/A	N/A	N/A	N/A	N/A	28%	27%
25 to 34	N/A	N/A	N/A	N/A	N/A	N/A	20%	22%
35 to 44	N/A	N/A	N/A	N/A	N/A	N/A	20%	21%
45+	N/A	N/A	N/A	N/A	N/A	N/A	32%	31%
<b>Marital Status</b>								
Married	N/A	N/A	N/A	N/A	N/A	N/A	52%	54%
Unmarried	N/A	N/A	N/A	N/A	N/A	N/A	48%	46%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	N/A	81%	81%
African-American	N/A	N/A	N/A	N/A	N/A	N/A	7%	6%
Hispanic	N/A	N/A	N/A	N/A	N/A	N/A	9%	10%
Asian	N/A	N/A	N/A	N/A	N/A	N/A	1%	1%
Other	N/A	N/A	N/A	N/A	N/A	N/A	5%	6%
<b>Children &lt;18</b>								
Yes	N/A	N/A	N/A	N/A	N/A	N/A	50%	52%
<b>Household Income</b>								
<\$40k	N/A	N/A	N/A	N/A	N/A	N/A	38%	33%
\$40k - \$79k	N/A	N/A	N/A	N/A	N/A	N/A	40%	41%
\$80k+	N/A	N/A	N/A	N/A	N/A	N/A	22%	26%
<b>Region</b>								
Northeast	N/A	N/A	N/A	N/A	N/A	N/A	14%	15%
South Central	N/A	N/A	N/A	N/A	N/A	N/A	39%	39%
North Central	N/A	N/A	N/A	N/A	N/A	N/A	24%	22%
West	N/A	N/A	N/A	N/A	N/A	N/A	22%	23%

\*Ethnicity: Will not add to 100%, see page 239 for details.   = Significant difference from 2004

# FISHING: WHERE PARTICIPANTS LIVE\*

Among those living in the South Central region of the U.S., 39% are fishing Participants compared to 34% among the national population.

## Regional Profile



\* Percent of total in each region that are Fishing Participants

= Significant difference from 2004

# FISHING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Other activities that fishing Participants are most likely to also have participated in during 2005 include camping (any type), bicycling (any type) and hiking.

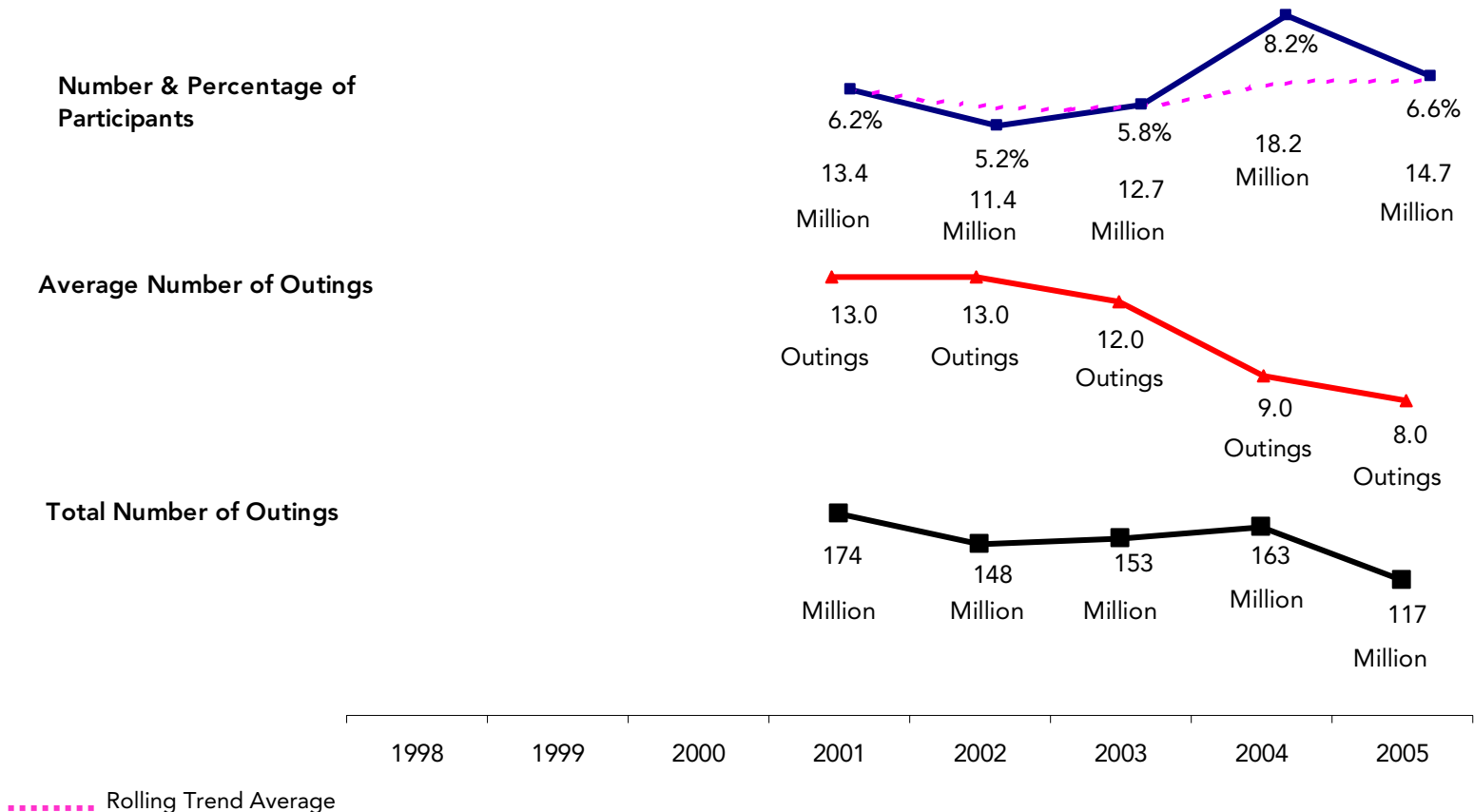
## Crossover Activities

Activities	Fishing in 2003	Fishing In 2004	Fishing in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	N/A	10%	10%	7,792,111
<b>Bicycling (Any Type)</b>	N/A	48%	48%	37,017,988
Bicycling (Paved Road)	N/A	44%	42%	32,552,428
<b>Bicycling (Mountain)</b>	N/A	32%	32%	24,639,552
Bicycling (Single Track)	N/A	26%	24%	18,927,983
Bicycling (Dirt Road)	N/A	26%	26%	19,774,583
Bird Watching	N/A	9%	8%	6,514,569
<b>Camping (Any Type)</b>	N/A	49%	50%	39,018,256
Camping (Away from Car)	N/A	15%	14%	11,026,039
Camping (Car)	N/A	35%	38%	29,244,433
Canoeing	N/A	17%	17%	13,002,232
<b>Climbing (Any Type)</b>	N/A	6%	6%	4,579,536
Climbing (Artificial Wall)	N/A	3%	4%	3,120,158
Climbing (Natural Rock)	N/A	4%	4%	3,164,183
Climbing (Ice)	N/A	1%	1%	668,451
Cross-Country/Nordic Skiing	N/A	6%	6%	4,912,506
<b>Fishing (Any Type)</b>	N/A	100%	100%	77,304,152
Fishing (Fly)	N/A	23%	19%	14,683,958
Fishing (Non-Fly)	N/A	95%	96%	74,192,006
Hiking	N/A	47%	46%	35,795,762
<b>Kayaking (Any Type)</b>	N/A	7%	8%	6,419,582
<b>Kayaking (Non-Whitewater)</b>	N/A	6%	8%	6,075,540
Kayaking (Sit-On-Top)	N/A	5%	6%	4,462,341
Kayaking (Tour/Sea)	N/A	3%	4%	3,066,136
Kayaking (Whitewater)	N/A	2%	2%	1,215,240
<b>Paddle sports (Any Type)</b>	N/A	23%	25%	19,601,511
Rafting	N/A	7%	8%	5,874,148
Snowshoeing	N/A	3%	4%	2,840,899
Telemark Skiing	N/A	3%	3%	1,945,401
Trail Running	N/A	25%	25%	19,462,351

# FLY FISHING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

Participation in fly fishing has fluctuated some over the past five years, but the trend reflects increased participation in the sport with 1.3 million more Americans 16 and older participating in 2005 than in 2001. The average number of outings, however, is on the decline. It has dropped from 13 trips in 2001 to only eight in 2005.

Although participation has risen, the decline in average outings per Participant yields a decreasing trend in the total number of outings over the past five years. Total outings have decreased by 57 million trips between 2001 and 2005.



# FLY FISHING: FREQUENCY OF PARTICIPATION

During 2005 fly fishing Participants averaged eight outings, a one-year decrease of 46 million outings (117 million in 2005) from 2004 (163 million).

The fly fishing population has historically been comprised of a significant percentage of Participants who go on only one or two outings per year—and this statistic is on the rise with 56% in 2005 compared to 35% in 2003. Further, this activity has seen a slight downward trend over the past five years in Participants going fly fishing 11 or more times per year.

### Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	N/A	N/A	N/A	17%	20%	18%	18%	25%
2 times	N/A	N/A	N/A	18%	17%	17%	29%	31%
3 to 6 times	N/A	N/A	N/A	33%	26%	36%	29%	19%
7 to 10 times	N/A	N/A	N/A	10%	8%	10%	6%	6%
11 or more times (NET)	N/A	N/A	N/A	23%	29%	19%	19%	19%
11 to 30	N/A	N/A	N/A	15%	20%	14%	12%	13%
31 or more times	N/A	N/A	N/A	7%	9%	5%	6%	6%
<b>Average Frequency</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>13.0</b>	<b>13.0</b>	<b>12.0</b>	<b>9.0</b>	<b>8.0</b>
<b>Total Outings (Millions)</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>174</b>	<b>148</b>	<b>153</b>	<b>163</b>	<b>117</b>

= Significant difference from 2003

# FLY FISHING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

Over three-quarters of the 2005 fly fishing Participant population is male and is also largely either 16 to 24 years old or 45 or older. There also is a shift in where fly fishing Participants live with fewer reporting living in the South Central region of the U.S. and more reporting living in the West.

## Demographic Profile

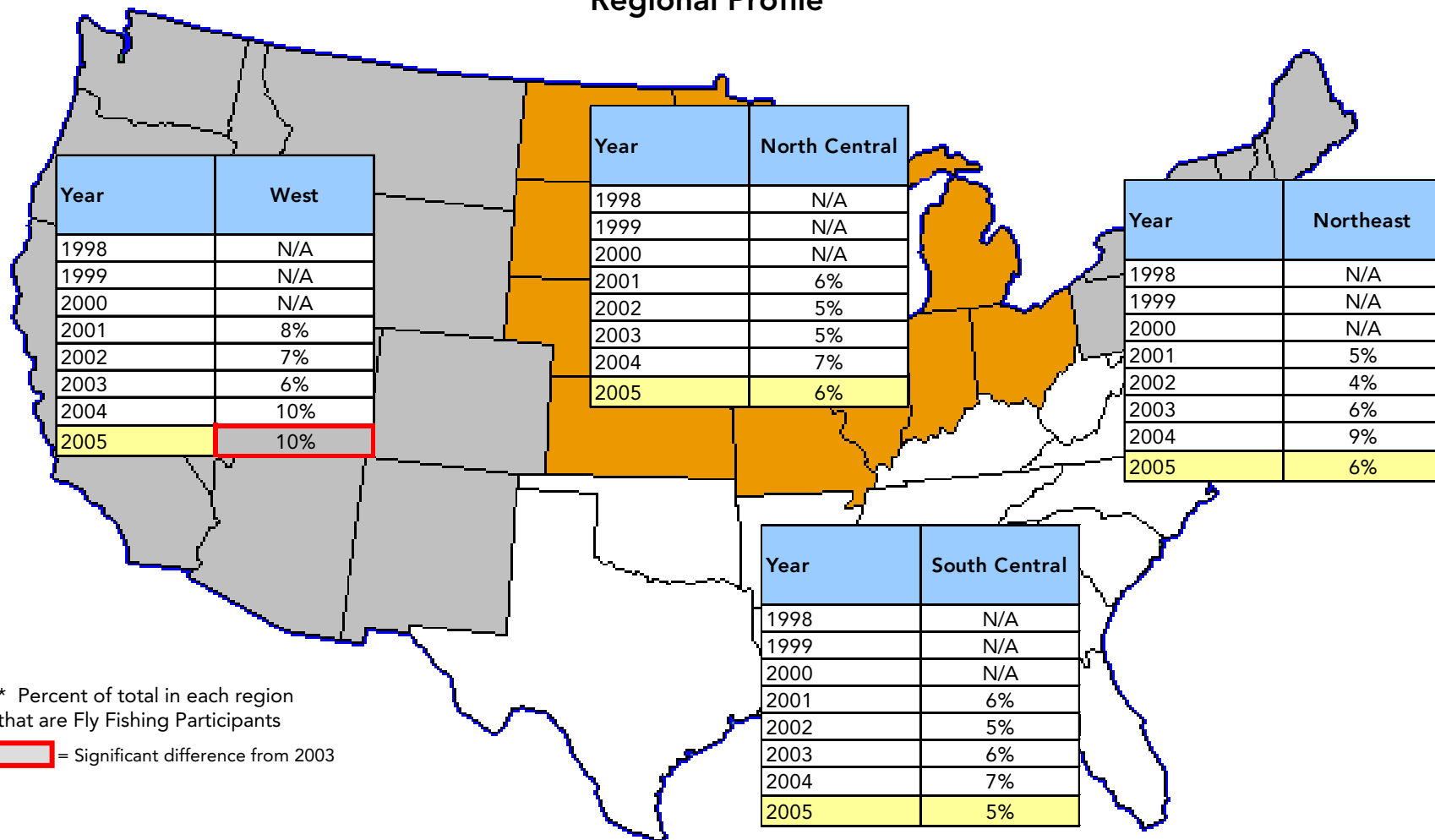
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	N/A	N/A	N/A	75%	70%	74%	66%	76%
Female	N/A	N/A	N/A	25%	30%	26%	34%	24%
<b>Age</b>								
16 to 24	N/A	N/A	N/A	30%	26%	28%	29%	30%
25 to 34	N/A	N/A	N/A	20%	26%	16%	18%	20%
35 to 44	N/A	N/A	N/A	21%	16%	15%	15%	20%
45+	N/A	N/A	N/A	29%	32%	41%	39%	30%
<b>Marital Status</b>								
Married	N/A	N/A	N/A	38%	50%	52%	49%	51%
Unmarried	N/A	N/A	N/A	62%	50%	48%	51%	49%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	86%	81%	80%
African-American	N/A	N/A	N/A	N/A	N/A	5%	7%	8%
Hispanic	N/A	N/A	N/A	N/A	N/A	7%	9%	11%
Asian	N/A	N/A	N/A	N/A	N/A	2%	2%	2%
Other	N/A	N/A	N/A	N/A	N/A	3%	4%	5%
<b>Children &lt;18</b>								
Yes	N/A	N/A	N/A	40%	42%	48%	46%	50%
<b>Household Income</b>								
<\$40k	N/A	N/A	N/A	47%	39%	41%	39%	30%
\$40k - \$79k	N/A	N/A	N/A	38%	39%	41%	38%	38%
\$80k+	N/A	N/A	N/A	15%	22%	18%	23%	32%
<b>Region</b>								
Northeast	N/A	N/A	N/A	17%	16%	20%	21%	17%
South Central	N/A	N/A	N/A	33%	31%	34%	30%	26%
North Central	N/A	N/A	N/A	21%	22%	20%	19%	20%
West	N/A	N/A	N/A	29%	31%	25%	29%	38%

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

# FLY FISHING: WHERE PARTICIPANTS LIVE\*

Among those living in the Western region of the U.S., 10% are fly fishing Participants compared to 7% of the national population.

## Regional Profile



\* Percent of total in each region that are Fly Fishing Participants

= Significant difference from 2003

# FLY FISHING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Other activities that fly fishing Participants are most likely to also have participated in during 2005 include hiking, camping (any type) and bicycling (any type).

## Crossover Activities

Activities	Fly Fishing in 2003	Fly Fishing In 2004	Fly Fishing in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	22%	18%	21%	3,026,956
<b>Bicycling (Any Type)</b>	55%	46%	56%	8,172,992
Bicycling (Paved Road)	46%	42%	47%	6,922,801
<b>Bicycling (Mountain)</b>	45%	35%	41%	5,970,926
Bicycling (Single Track)	36%	31%	34%	5,047,926
Bicycling (Dirt Road)	34%	30%	35%	5,106,061
Bird Watching	16%	12%	13%	1,950,877
<b>Camping (Any Type)</b>	60%	55%	59%	8,710,307
Camping (Away from Car)	23%	24%	25%	3,719,642
Camping (Car)	39%	32%	37%	5,392,991
Canoeing	28%	23%	23%	3,374,448
<b>Climbing (Any Type)</b>	11%	7%	7%	1,020,752
Climbing (Artificial Wall)	6%	5%	5%	743,538
Climbing (Natural Rock)	9%	6%	6%	837,064
Climbing (Ice)	2%	2%	2%	319,318
Cross-Country/Nordic Skiing	16%	10%	11%	1,549,217
<b>Fishing (Any Type)</b>	N/A	100%	100%	14,683,958
Fishing (Fly)	100%	100%	100%	14,683,958
Fishing (Non-Fly)	N/A	79%	80%	11,688,671
Hiking	62%	56%	61%	8,891,376
<b>Kayaking (Any Type)</b>	9%	10%	14%	2,122,250
<b>Kayaking (Non-Whitewater)</b>	9%	8%	14%	2,122,250
Kayaking (Sit-On-Top)	8%	7%	10%	1,527,162
Kayaking (Tour/Sea)	4%	5%	9%	1,328,395
Kayaking (Whitewater)	2%	5%	3%	415,432
<b>Paddle sports (Any Type)</b>	34%	30%	38%	5,574,000
Rafting	13%	9%	12%	1,802,657
Snowshoeing	9%	7%	9%	1,314,024
Telemark Skiing	7%	5%	4%	550,735
Trail Running	25%	27%	30%	4,400,831

= Significant difference from 2003



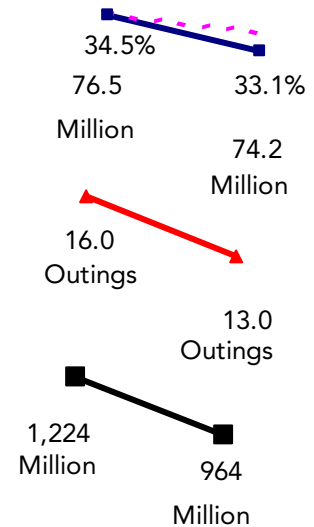
# NON-FLY FISHING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

The number of total outings generated by Americans 16 and older who went non-fly fishing in 2005 (1.0 billion) dropped compared to 2004 numbers (1.3 billion). This drop is partly due to a decline of 2.3 million Participants as well as a decline in average outings per Participant from 17 in 2004 to 13 in 2005.

Number & Percentage of Participants

Average Number of Outings

Total Number of Outings



..... Rolling Trend Average

# NON-FLY FISHING: FREQUENCY OF PARTICIPATION

During 2005, non-fly fishing Participants averaged 13 outings—a significant decrease from an average of 16 outings in 2004—yielding a one-year decrease of 0.3 billion total outings (.9 billion in 2005) from the previous year (1.2 billion).

Over one-quarter (27%) of non-fly fishing Participants took 11 or more outings in 2005, while slightly more than that (31%) went non-fly fishing three to six times.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	N/A	N/A	N/A	N/A	N/A	N/A	13%	17%
2 times	N/A	N/A	N/A	N/A	N/A	N/A	13%	15%
3 to 6 times	N/A	N/A	N/A	N/A	N/A	N/A	29%	31%
7 to 10 times	N/A	N/A	N/A	N/A	N/A	N/A	12%	9%
<b>11 or more times (NET)</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>33%</b>	<b>27%</b>
11 to 15 times	N/A	N/A	N/A	N/A	N/A	N/A	11%	8%
16 to 20 times	N/A	N/A	N/A	N/A	N/A	N/A	5%	5%
21 to 30 times	N/A	N/A	N/A	N/A	N/A	N/A	6%	6%
31 to 50 times	N/A	N/A	N/A	N/A	N/A	N/A	6%	3%
51 or more times	N/A	N/A	N/A	N/A	N/A	N/A	5%	4%
<b>Average Frequency</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>16.0</b>	<b>13.0</b>
<b>Total Outings (Millions)</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>1,224</b>	<b>964</b>

  = Significant difference from 2004

# NON-FLY FISHING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

Males outnumber females in the 2005 non-fly fishing Participant population nearly two to one, and their ages are distributed across the board. Most (81%) 2005 non-fly fishing Participants are Caucasian and about half (52%) have children under age 18. Non-fly fishing Participants are most likely to live in the South Central region of the U.S.

## Demographic Profile

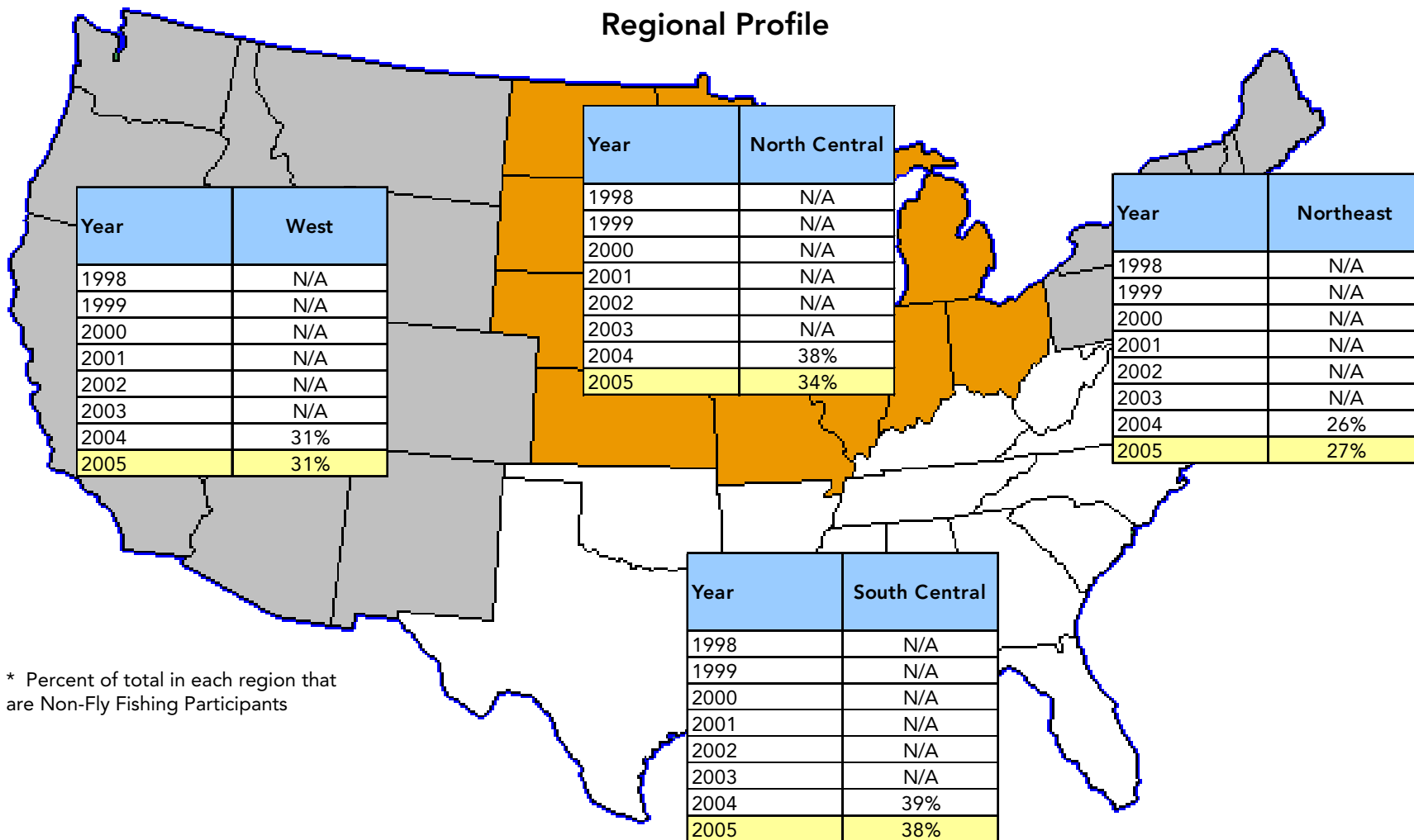
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	N/A	N/A	N/A	N/A	N/A	N/A	64%	65%
Female	N/A	N/A	N/A	N/A	N/A	N/A	36%	35%
<b>Age</b>								
16 to 24	N/A	N/A	N/A	N/A	N/A	N/A	28%	27%
25 to 34	N/A	N/A	N/A	N/A	N/A	N/A	20%	22%
35 to 44	N/A	N/A	N/A	N/A	N/A	N/A	20%	21%
45+	N/A	N/A	N/A	N/A	N/A	N/A	31%	31%
<b>Marital Status</b>								
Married	N/A	N/A	N/A	N/A	N/A	N/A	52%	55%
Unmarried	N/A	N/A	N/A	N/A	N/A	N/A	48%	45%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	N/A	82%	81%
African-American	N/A	N/A	N/A	N/A	N/A	N/A	7%	6%
Hispanic	N/A	N/A	N/A	N/A	N/A	N/A	9%	10%
Asian	N/A	N/A	N/A	N/A	N/A	N/A	1%	1%
Other	N/A	N/A	N/A	N/A	N/A	N/A	5%	6%
<b>Children &lt;18</b>								
Yes	N/A	N/A	N/A	N/A	N/A	N/A	50%	52%
<b>Household Income</b>								
<\$40k	N/A	N/A	N/A	N/A	N/A	N/A	38%	33%
\$40k - \$79k	N/A	N/A	N/A	N/A	N/A	N/A	41%	41%
\$80k+	N/A	N/A	N/A	N/A	N/A	N/A	21%	26%
<b>Region</b>								
Northeast	N/A	N/A	N/A	N/A	N/A	N/A	14%	15%
South Central	N/A	N/A	N/A	N/A	N/A	N/A	39%	40%
North Central	N/A	N/A	N/A	N/A	N/A	N/A	25%	23%
West	N/A	N/A	N/A	N/A	N/A	N/A	22%	23%

\*Ethnicity: Will not add to 100%, see page 239 for details.   = Significant difference from 2004

# NON-FLY FISHING: WHERE PARTICIPANTS LIVE\*

The South Central region of the U.S. has the greatest percentage of non-fly fishing Participants with 38% of them participating compared to 33% of the national population.

## Regional Profile



\* Percent of total in each region that are Non-Fly Fishing Participants

# NON-FLY FISHING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Other activities that non-fly fishing participants are most likely to also have participated in during 2005 include camping (any type), bicycling (any type) and hiking.

## Crossover Activities

Activities	Fishing Non-Fly in 2003	Fishing Non-Fly In 2004	Fishing Non-Fly in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	N/A	9%	10%	7,128,262
<b>Bicycling (Any Type)</b>	N/A	48%	47%	35,223,343
Bicycling (Paved Road)	N/A	44%	42%	31,121,126
<b>Bicycling (Mountain)</b>	N/A	32%	32%	23,538,042
Bicycling (Single Track)	N/A	26%	24%	18,145,790
Bicycling (Dirt Road)	N/A	26%	26%	19,011,691
Bird Watching	N/A	9%	8%	6,066,200
<b>Camping (Any Type)</b>	N/A	49%	50%	37,238,690
Camping (Away from Car)	N/A	15%	14%	10,075,279
Camping (Car)	N/A	35%	38%	28,120,504
Canoeing	N/A	17%	16%	12,206,404
<b>Climbing (Any Type)</b>	N/A	6%	6%	4,499,359
Climbing (Artificial Wall)	N/A	3%	4%	3,120,158
Climbing (Natural Rock)	N/A	4%	4%	3,084,005
Climbing (Ice)	N/A	1%	1%	668,451
Cross-Country/Nordic Skiing	N/A	6%	6%	4,199,779
<b>Fishing (Any Type)</b>	N/A	100%	100%	74,192,006
Fishing (Fly)	N/A	19%	16%	11,688,671
Fishing (Non-Fly)	N/A	100%	100%	74,192,006
Hiking	N/A	47%	45%	33,700,335
<b>Kayaking (Any Type)</b>	N/A	6%	8%	5,910,624
<b>Kayaking (Non-Whitewater)</b>	N/A	6%	8%	5,566,582
Kayaking (Sit-On-Top)	N/A	5%	5%	4,033,560
Kayaking (Tour/Sea)	N/A	3%	4%	2,796,318
Kayaking (Whitewater)	N/A	2%	1%	1,079,609
<b>Paddle sports (Any Type)</b>	N/A	23%	25%	18,365,526
Rafting	N/A	7%	7%	5,462,695
Snowshoeing	N/A	3%	3%	2,531,278
Telemark Skiing	N/A	3%	2%	1,739,290
Trail Running	N/A	25%	25%	18,273,319

OUTDOOR RECREATION PARTICIPATION STUDY

# **KAYAKING – RECREATION/SIT-ON-TOP, TOURING/SEA, WHITEWATER**

*"Have you gone touring / sea kayaking?"*

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

*"Have you gone whitewater kayaking?"*

# KAYAKING: 12.6 MILLION PARTICIPANTS, 86 MILLION OUTINGS

## THE 2005 AMERICAN KAYAKER

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

## MAJOR TRENDS IN KAYAKING

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

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

### Year 2005 Events of Note

Kayaking is very demographically balanced.

### Observation/Implication

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

## KAYAKING: SUB-ACTIVITIES

**SEA/TOUR KAYAKING: 5.6 MILLION PARTICIPANTS, 28 MILLION OUTINGS**

**SIT-ON-TOP KAYAKING: 9 MILLION PARTICIPANTS, 54 MILLION OUTINGS**

**WHITEWATER KAYAKING: 2.2 MILLION PARTICIPANTS\***

### THE 2005 AMERICAN SEA/TOUR KAYAKER

- Primarily male, affluent and Caucasian
- Mean age of 35 years
- Regionally balanced
- Also participate in trail running, bicycling (paved road) and sit-on-top kayaking
- The average number of outings in 2005 was five
- Four in ten participated in only one outing

### MAJOR TRENDS IN SEA/TOUR KAYAKING

Participation in sea/touring kayaking has remained stable over the past five years.

- Crossover Activity: In 2005, Participants are more likely to fly-fish than were 2003 Participants

### Year 2005 Event of Note

Sea/touring kayaking sees a large cross-over with sit-on-top kayaking.

### Observation/Implication

Expand this activity's demographic reach by appealing to recreational/sit-on-top kayakers.

### THE 2005 AMERICAN SIT-ON-TOP KAYAKER

- Slightly more male than female
- Majority are married
- Mean age of 37 years
- Regionally balanced
- The average number of outings equaled six
- 44% participated in a single outing

### MAJOR TRENDS IN SIT-ON-TOP KAYAKING

Participation has steadily increased over the past five years. With 54 million total outings, 2005 had the most outings since the activity began being measured.

- Ethnicity: During 2005, there was increased participation among the Hispanic population compared to 2003.
- Marital Status: 2005 participants were more likely to be married compared to 2003 participants.

### Year 2005 Event of Note

Participants are more gender balanced than sea/touring kayaking. Participation has increased among Hispanics.

### Observation/Implication

Continue growth in this activity by expanding reach into female and ethnic populations

\*Sample size among whitewater kayakers too small to present detailed analysis.

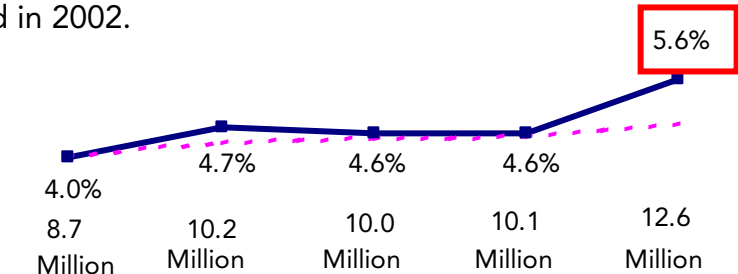


# KAYAKING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

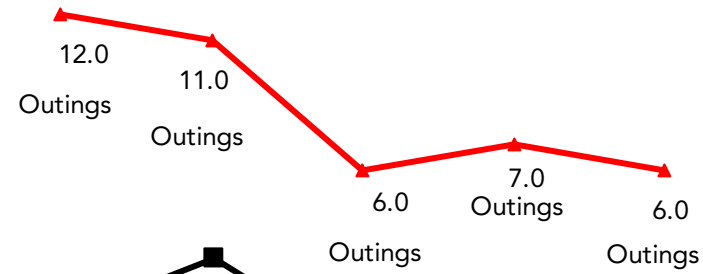
During 2005, the number of Americans participating in kayaking grew significantly over previous years. Six percent, or 12.6 million Americans, participated in some form of kayaking during 2005. Although participation in the sport grew, the average number of outings remained low compared to high levels measured in 2001 and 2002.

Total number of outings grew 13 million, from 73 to 86 million, over the past two years, but is still well below the high of 98 million total kayaking outings measured in 2002.

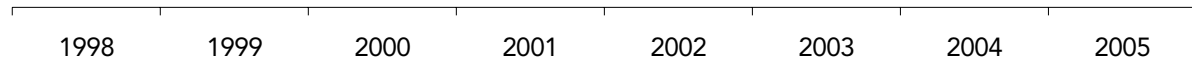
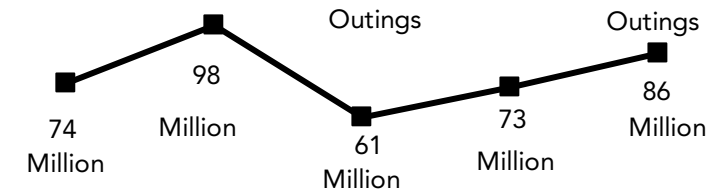
Number & Percentage of Participants



Average Number of Outings



Total Number of Outings



..... Rolling Trend Average

= Significant difference from 2003

\*Total Outings are calculated by summing Sea/Tour, Sit-on-Top and Whitewater Kayaking outings.

# KAYAKING: FREQUENCY OF PARTICIPATION

During 2005, kayaking Participants averaged six outings—yielding a two year increase of 25 million in total outings from 61 million in 2003 to 86 million in 2005.

The kayaking population has historically been comprised of a significant percentage of Participants who go on only one outing per year. During 2005 more than one-third (36%) of Participants fit this “casual” frequency profile.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	N/A	N/A	N/A	24%	21%	27%	29%	36%
2 times	N/A	N/A	N/A	16%	19%	18%	23%	20%
3 to 6 times	N/A	N/A	N/A	32%	33%	40%	30%	27%
7 to 10 times	N/A	N/A	N/A	7%	7%	6%	9%	7%
11 or more times (NET)	N/A	N/A	N/A	21%	19%	9%	10%	11%
11 to 30	N/A	N/A	N/A	14%	14%	5%	6%	8%
31 or more times	N/A	N/A	N/A	6%	5%	3%	4%	3%
<b>Average Frequency</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>12.0</b>	<b>11.0</b>	<b>6.0</b>	<b>7.0</b>	<b>6.0</b>
<b>Total Outings (Millions)</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>74</b>	<b>98</b>	<b>61</b>	<b>73</b>	<b>86</b>

\*Total Outings are calculated by summing Sea/Tour, Sit-on-Top and Whitewater Kayaking outings.

= Significant difference from 2003

# KAYAKING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

During 2005, kayakers are demographically balanced across gender, age, marital status, children in the household and region. However, kayaking participants are predominately Caucasian (89%).

## Demographic Profile

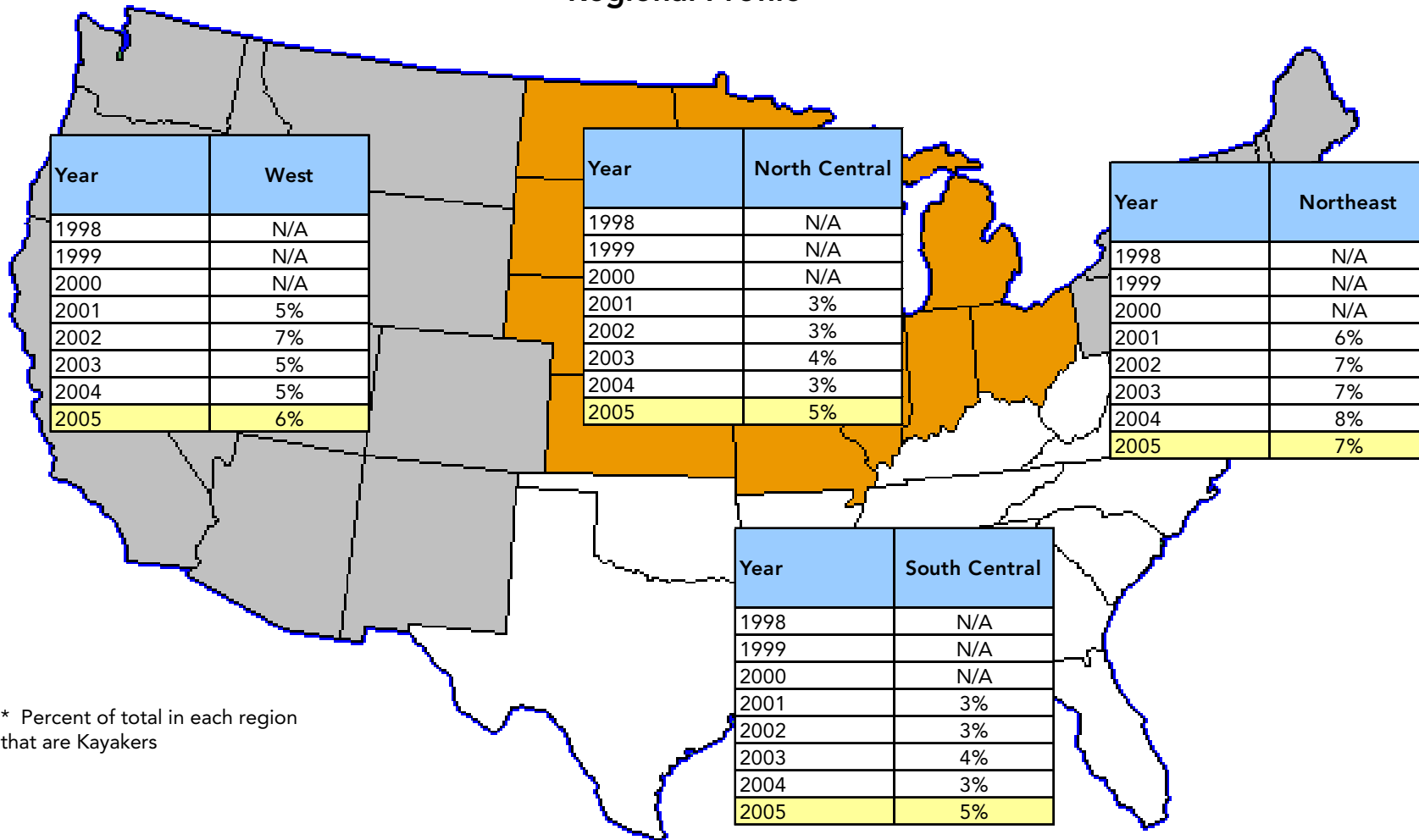
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	N/A	N/A	N/A	49%	60%	61%	60%	55%
Female	N/A	N/A	N/A	51%	40%	39%	40%	45%
<b>Age</b>								
16 to 24	N/A	N/A	N/A	36%	36%	36%	37%	31%
25 to 34	N/A	N/A	N/A	27%	16%	20%	19%	20%
35 to 44	N/A	N/A	N/A	15%	18%	21%	17%	21%
45+	N/A	N/A	N/A	21%	30%	23%	27%	28%
<b>Marital Status</b>								
Married	N/A	N/A	N/A	37%	43%	46%	46%	54%
Unmarried	N/A	N/A	N/A	63%	57%	54%	54%	46%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	90%	81%	89%
African-American	N/A	N/A	N/A	N/A	N/A	2%	2%	3%
Hispanic	N/A	N/A	N/A	N/A	N/A	5%	11%	8%
Asian	N/A	N/A	N/A	N/A	N/A	2%	2%	2%
Other	N/A	N/A	N/A	N/A	N/A	4%	9%	4%
<b>Children &lt;18</b>								
Yes	N/A	N/A	N/A	36%	42%	49%	49%	51%
<b>Household Income</b>								
<\$40k	N/A	N/A	N/A	26%	24%	26%	21%	24%
\$40k - \$79k	N/A	N/A	N/A	47%	37%	43%	34%	33%
\$80k+	N/A	N/A	N/A	27%	39%	32%	45%	44%
<b>Region</b>								
Northeast	N/A	N/A	N/A	29%	28%	27%	33%	24%
South Central	N/A	N/A	N/A	28%	23%	27%	25%	31%
North Central	N/A	N/A	N/A	15%	18%	20%	16%	21%
West	N/A	N/A	N/A	29%	31%	26%	26%	24%

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

# KAYAKING: WHERE PARTICIPANTS LIVE\*

No single region has a significantly greater percentage of kayakers among their population.

## Regional Profile



\* Percent of total in each region that are Kayakers

# KAYAKING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

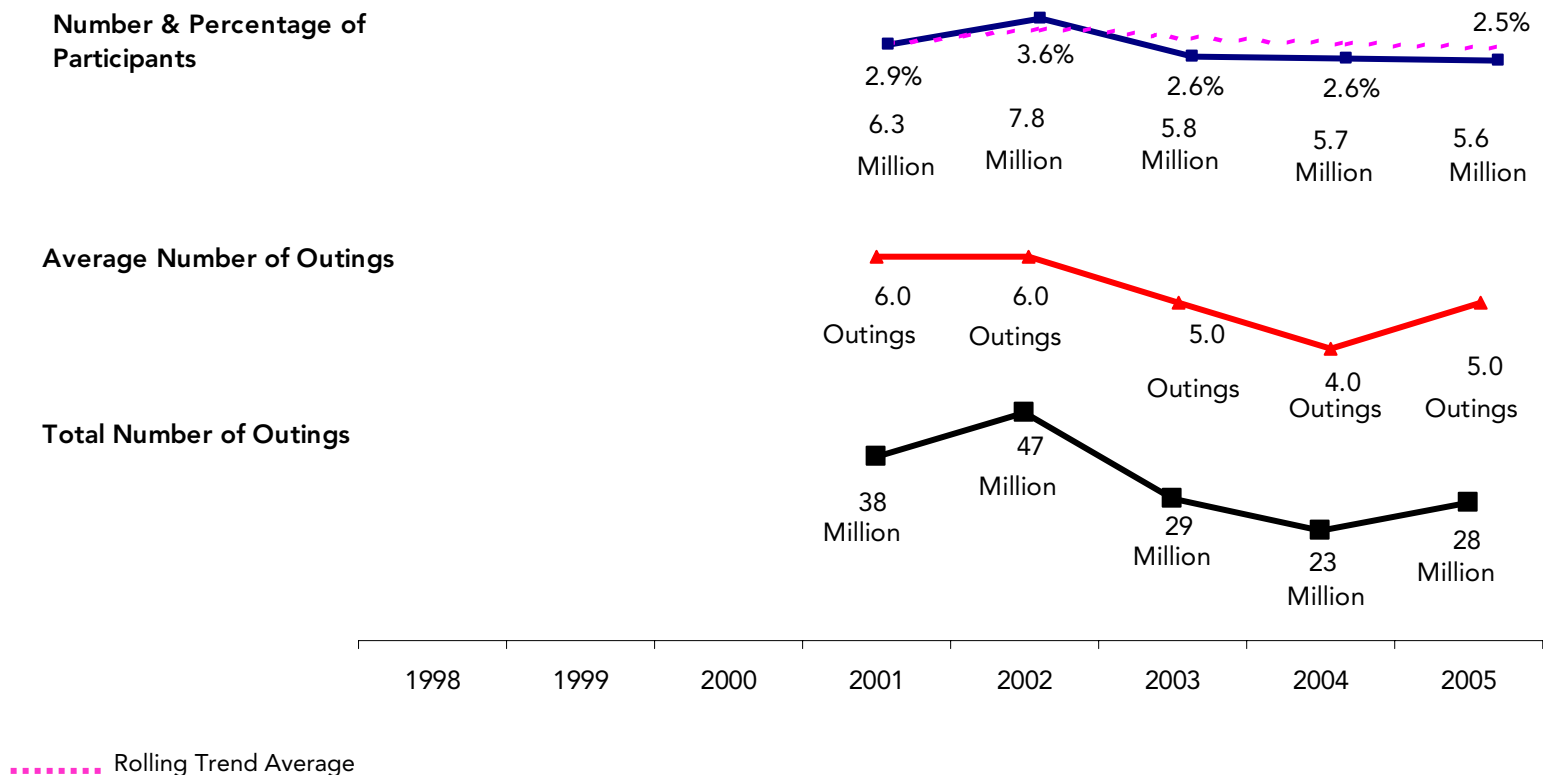
Mountain biking, fishing (non-fly) and trail running are other outdoor activities that kayakers enjoy. Non-whitewater kayaking is the primary type of kayaking participated in among kayakers.

## Crossover Activities

Activities	Kayaking in 2003	Kayaking In 2004	Kayaking in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	<b>22%</b>	<b>22%</b>	<b>17%</b>	<b>2,113,952</b>
<b>Bicycling (Any Type)</b>	<b>70%</b>	<b>69%</b>	<b>65%</b>	<b>8,138,981</b>
Bicycling (Paved Road)	65%	62%	55%	6,956,529
<b>Bicycling (Mountain)</b>	<b>52%</b>	<b>49%</b>	<b>48%</b>	<b>6,000,006</b>
Bicycling (Single Track)	45%	42%	38%	4,782,506
Bicycling (Dirt Road)	40%	39%	36%	4,539,758
Bird Watching	14%	13%	12%	1,495,940
<b>Camping (Any Type)</b>	<b>58%</b>	<b>58%</b>	<b>54%</b>	<b>6,832,475</b>
Camping (Away from Car)	29%	28%	24%	3,013,618
Camping (Car)	31%	31%	35%	4,371,892
Canoeing	46%	56%	41%	5,163,100
<b>Climbing (Any Type)</b>	<b>19%</b>	<b>16%</b>	<b>12%</b>	<b>1,539,026</b>
Climbing (Artificial Wall)	15%	13%	10%	1,237,089
Climbing (Natural Rock)	11%	13%	7%	848,969
Climbing (Ice)	0%	2%	1%	109,463
Cross-Country/Nordic Skiing	15%	17%	14%	1,805,192
<b>Fishing (Any Type)</b>	<b>N/A</b>	<b>54%</b>	<b>51%</b>	<b>6,419,582</b>
Fishing (Fly)	12%	18%	17%	2,122,250
Fishing (Non-Fly)	N/A	49%	47%	5,910,624
Hiking	75%	75%	74%	9,298,707
<b>Kayaking (Any Type)</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>12,581,968</b>
<b>Kayaking (Non-Whitewater)</b>	<b>92%</b>	<b>93%</b>	<b>95%</b>	<b>11,941,941</b>
Kayaking (Sit-On-Top)	65%	72%	72%	8,996,331
Kayaking (Tour/Sea)	58%	56%	45%	5,630,306
Kayaking (Whitewater)	18%	22%	17%	2,185,100
<b>Paddle sports (Any Type)</b>	<b>100%</b>	<b>100%</b>	<b>100%</b>	<b>12,581,968</b>
Rafting	21%	23%	16%	1,984,319
Snowshoeing	9%	10%	7%	939,090
Telemark Skiing	7%	5%	3%	405,977
Trail Running	44%	51%	44%	5,593,267

# SEA/TOUR KAYAKING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

During 2005, participation in sea/touring kayaking remained stable at 2.5% or 5.6 million participants. The average number of sea/touring kayaking outings in 2005 equaled five. Based on the size of the Participant population and frequency, 28 million kayaking outings were generated in 2005, 5 million more than the previous year.



# SEA/TOUR KAYAKING: FREQUENCY OF PARTICIPATION

During 2005, four in ten sea/touring kayakers limited their participation to a single outing and another 44% kayaked between two and six times.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	N/A	N/A	N/A	38%	45%	44%	48%	41%
2 times	N/A	N/A	N/A	24%	16%	17%	18%	23%
3 to 6 times	N/A	N/A	N/A	22%	25%	28%	23%	21%
7 to 10 times	N/A	N/A	N/A	8%	4%	2%	5%	5%
<b>11 or more times (NET)</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>9%</b>	<b>11%</b>	<b>9%</b>	<b>5%</b>	<b>10%</b>
11 to 30	N/A	N/A	N/A	5%	6%	7%	4%	9%
31 or more times	N/A	N/A	N/A	3%	5%	2%	1%	2%
<b>Average Frequency</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>6.0</b>	<b>6.0</b>	<b>5.0</b>	<b>4.0</b>	<b>5.0</b>
<b>Total Outings (Millions)</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>38</b>	<b>47</b>	<b>29</b>	<b>23</b>	<b>28</b>

# SEA/TOUR KAYAKING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

Almost two thirds of sea/touring kayakers are male and close to nine in ten are Caucasian.

Over half of sea/touring kayakers are under the age of 35. The lowest percentage of sea/touring kayakers are between the ages of 35 and 44, with only 16% in this age group.

## Demographic Profile

Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	N/A	N/A	N/A	51%	60%	58%	55%	64%
Female	N/A	N/A	N/A	49%	40%	42%	45%	36%
<b>Age</b>								
16 to 24	N/A	N/A	N/A	40%	39%	32%	34%	30%
25 to 34	N/A	N/A	N/A	26%	15%	19%	18%	23%
35 to 44	N/A	N/A	N/A	15%	16%	21%	21%	16%
45+	N/A	N/A	N/A	18%	29%	28%	27%	31%
<b>Marital Status</b>								
Married	N/A	N/A	N/A	36%	42%	44%	46%	53%
Unmarried	N/A	N/A	N/A	64%	57%	56%	54%	47%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	88%	73%	89%
African-American	N/A	N/A	N/A	N/A	N/A	1%	2%	4%
Hispanic	N/A	N/A	N/A	N/A	N/A	9%	17%	7%
Asian	N/A	N/A	N/A	N/A	N/A	3%	3%	1%
Other	N/A	N/A	N/A	N/A	N/A	4%	13%	4%
<b>Children &lt;18</b>								
Yes	N/A	N/A	N/A	36%	44%	39%	51%	52%
<b>Household Income</b>								
<\$40k	N/A	N/A	N/A	23%	23%	27%	18%	27%
\$40k - \$79k	N/A	N/A	N/A	47%	36%	35%	40%	29%
\$80k+	N/A	N/A	N/A	30%	41%	39%	42%	43%
<b>Region</b>								
Northeast	N/A	N/A	N/A	27%	30%	29%	31%	24%
South Central	N/A	N/A	N/A	31%	22%	22%	23%	28%
North Central	N/A	N/A	N/A	13%	17%	18%	16%	16%
West	N/A	N/A	N/A	29%	31%	32%	30%	33%

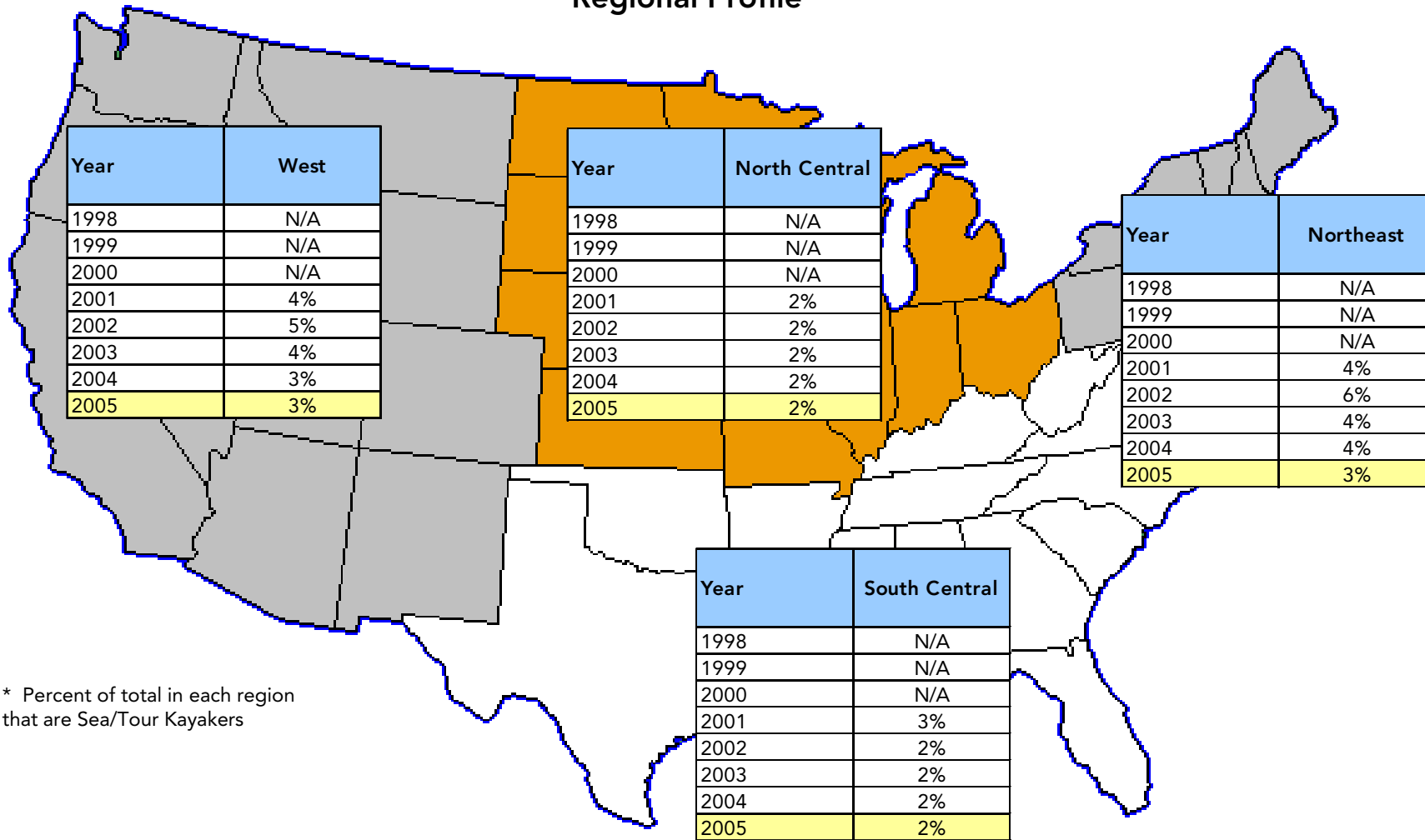
\*Ethnicity: Will not add to 100%, see page 239 for details.



# SEA/TOUR KAYAKING: WHERE PARTICIPANTS LIVE\*

No single region has a significantly greater percentage of sea/touring kayakers among their population.

## Regional Profile



\* Percent of total in each region that are Sea/Tour Kayakers

# SEA/TOUR KAYAKING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Almost half of sea/touring kayakers also participate in the other non-whitewater kayaking (sit-on-top). Paved road bicycling and trail running are also popular activities among this group. More sea/touring kayakers participated in fly-fishing during 2005 than in 2003.

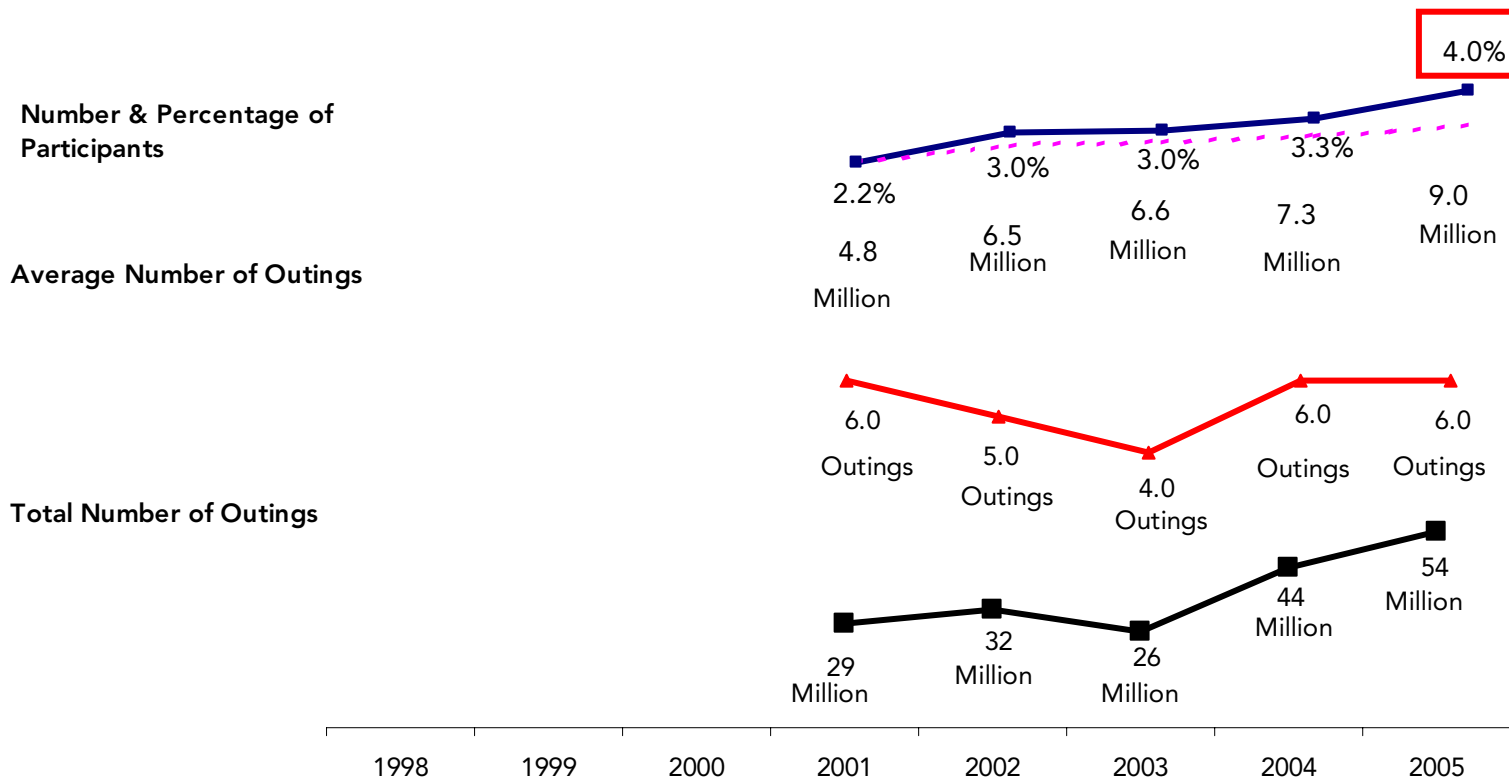
## Crossover Activities



Activities	Sea/Tour Kayaking in 2003	Sea/Tour Kayaking In 2004	Sea/Tour Kayaking in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	21%	23%	19%	1,056,519
<b>Bicycling (Any Type)</b>	75%	74%	68%	3,804,381
Bicycling (Paved Road)	69%	65%	58%	3,270,169
<b>Bicycling (Mountain)</b>	59%	53%	56%	3,157,244
Bicycling (Single Track)	49%	47%	50%	2,841,384
Bicycling (Dirt Road)	48%	47%	40%	2,247,732
Bird Watching	12%	12%	12%	652,055
<b>Camping (Any Type)</b>	53%	57%	51%	2,880,576
Camping (Away from Car)	26%	28%	25%	1,385,821
Camping (Car)	28%	31%	30%	1,684,395
Canoeing	40%	52%	33%	1,838,498
<b>Climbing (Any Type)</b>	15%	15%	18%	1,021,281
Climbing (Artificial Wall)	8%	13%	14%	799,521
Climbing (Natural Rock)	11%	13%	14%	768,791
Climbing (Ice)	1%	3%	2%	109,463
Cross-Country/Nordic Skiing	13%	19%	17%	957,328
<b>Fishing (Any Type)</b>	N/A	48%	54%	3,066,136
Fishing (Fly)	8%	16%	24%	1,328,395
Fishing (Non-Fly)	N/A	41%	50%	2,796,318
Hiking	73%	83%	81%	4,536,244
<b>Kayaking (Any Type)</b>	100%	100%	100%	5,630,306
<b>Kayaking (Non-Whitewater)</b>	100%	100%	100%	5,630,306
Kayaking (Sit-On-Top)	53%	62%	48%	2,684,696
<b>Kayaking (Tour/Sea)</b>	100%	100%	100%	5,630,306
Kayaking (Whitewater)	17%	22%	23%	1,273,811
<b>Paddle sports (Any Type)</b>	100%	100%	100%	5,630,306
Rafting	14%	23%	14%	808,348
Snowshoeing	5%	9%	7%	367,905
Telemark Skiing	4%	5%	4%	245,623
Trail Running	49%	54%	51%	2,867,704

  = Significant difference from 2003

# SIT-ON-TOP KAYAKING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

Over the past five years, participation in recreational/sit-on-top kayaking has steadily increased. During 2005, this form of kayaking increased significantly from 2003. The average frequency of participation among these kayakers equals six and participants generate 54 million total outings—the greatest number of outings since the activity was measured.



 Rolling Trend Average  
 = Significant difference from 2003

# SIT-ON-TOP KAYAKING: FREQUENCY OF PARTICIPATION

As with other kayaking activities, a large percentage of participants only take a single outing during the year. During 2005, 44% of recreational/sit-on-top kayakers went on a single outing. Just one in ten kayakers participated 11 or more times during the year.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	N/A	N/A	N/A	39%	43%	48%	42%	44%
2 times	N/A	N/A	N/A	26%	17%	13%	24%	17%
3 to 6 times	N/A	N/A	N/A	15%	21%	29%	21%	22%
7 to 10 times	N/A	N/A	N/A	8%	8%	4%	3%	6%
11 or more times (NET)	N/A	N/A	N/A	12%	12%	6%	10%	10%
11 to 30	N/A	N/A	N/A	10%	10%	6%	7%	7%
31 or more times	N/A	N/A	N/A	2%	2%	1%	3%	3%
<b>Average Frequency</b>	N/A	N/A	N/A	6.0	5.0	4.0	6.0	6.0
<b>Total Outings (Millions)</b>	N/A	N/A	N/A	29	32	26	44	54

# SIT-ON-TOP KAYAKING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

For the first time since this type of kayaking was measured, a greater percentage of participants are married than are unmarried.

## Demographic Profile

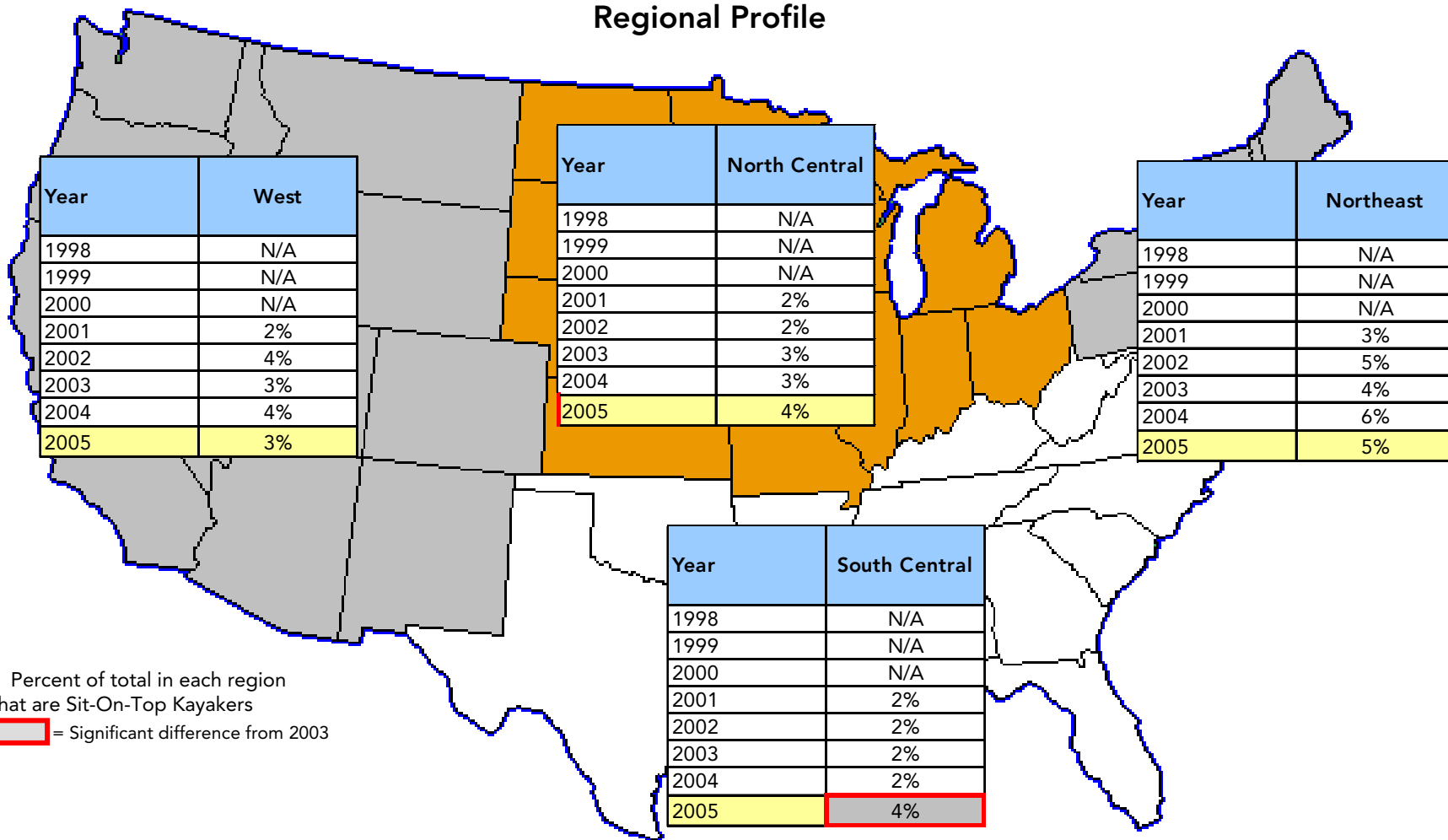
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	N/A	N/A	N/A	48%	59%	64%	62%	54%
Female	N/A	N/A	N/A	52%	41%	36%	38%	46%
<b>Age</b>								
16 to 24	N/A	N/A	N/A	34%	38%	30%	37%	27%
25 to 34	N/A	N/A	N/A	26%	16%	21%	23%	18%
35 to 44	N/A	N/A	N/A	20%	18%	23%	11%	26%
45+	N/A	N/A	N/A	21%	29%	25%	29%	29%
<b>Marital Status</b>								
Married	N/A	N/A	N/A	41%	39%	47%	49%	59%
Unmarried	N/A	N/A	N/A	59%	60%	53%	51%	41%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	92%	81%	89%
African-American	N/A	N/A	N/A	N/A	N/A	2%	3%	4%
Hispanic	N/A	N/A	N/A	N/A	N/A	2%	10%	8%
Asian	N/A	N/A	N/A	N/A	N/A	2%	2%	2%
Other	N/A	N/A	N/A	N/A	N/A	4%	9%	4%
<b>Children &lt;18</b>								
Yes	N/A	N/A	N/A	37%	47%	54%	49%	53%
<b>Household Income</b>								
<\$40k	N/A	N/A	N/A	31%	23%	26%	20%	23%
\$40k - \$79k	N/A	N/A	N/A	39%	44%	43%	41%	32%
\$80k+	N/A	N/A	N/A	31%	33%	32%	39%	45%
<b>Region</b>								
Northeast	N/A	N/A	N/A	28%	30%	27%	34%	25%
South Central	N/A	N/A	N/A	30%	23%	27%	22%	33%
North Central	N/A	N/A	N/A	16%	18%	21%	18%	22%
West	N/A	N/A	N/A	26%	29%	25%	26%	20%

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

# SIT-ON-TOP KAYAKING: WHERE PARTICIPANTS LIVE\*

No single region has a significantly greater percentage of sea/touring kayakers among their population. Participation in the South Central region increased in 2005. Four percent of those living in the South Central region are recreational/sit-on-top kayakers compared to 2% in 2003 & 2004.

## Regional Profile



# SIT-ON-TOP KAYAKING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Hiking is the most popular other outdoor activity among participants. During 2005, fewer recreational/sit-on-top kayakers participated in climbing (artificial wall and ice) and Telemark skiing.

## Crossover Activities

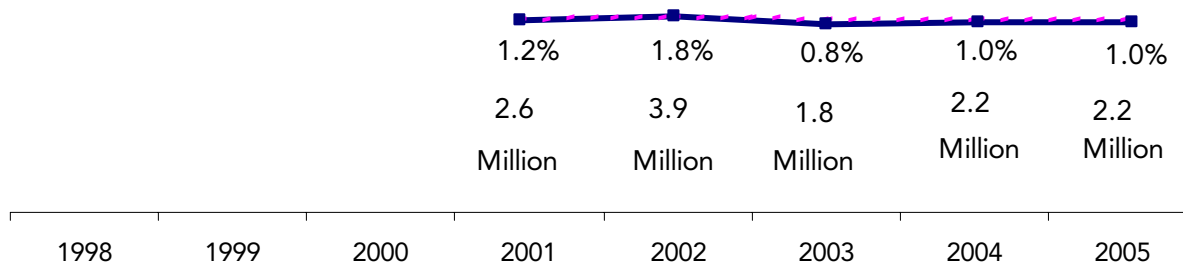
Activities	Sit-On-Top Kayaking in 2003	Sit-On-Top Kayaking In 2004	Sit-On-Top Kayaking in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	23%	18%	16%	1,448,671
<b>Bicycling (Any Type)</b>	69%	67%	65%	5,843,860
Bicycling (Paved Road)	67%	61%	58%	5,203,015
<b>Bicycling (Mountain)</b>	50%	47%	43%	3,908,161
Bicycling (Single Track)	43%	39%	32%	2,920,104
Bicycling (Dirt Road)	38%	37%	35%	3,173,738
Bird Watching	11%	12%	13%	1,183,649
<b>Camping (Any Type)</b>	58%	59%	53%	4,802,646
Camping (Away from Car)	29%	25%	26%	2,313,629
Camping (Car)	31%	34%	33%	2,993,997
Canoeing	47%	56%	43%	3,859,970
<b>Climbing (Any Type)</b>	20%	14%	9%	818,292
Climbing (Artificial Wall)	18%	11%	7%	657,937
Climbing (Natural Rock)	11%	13%	4%	344,042
Climbing (Ice)	1%	1%	1%	48,057
Cross-Country/Nordic Skiing	17%	12%	15%	1,377,855
<b>Fishing (Any Type)</b>	N/A	58%	50%	4,462,341
Fishing (Fly)	15%	17%	17%	1,527,162
Fishing (Non-Fly)	N/A	53%	45%	4,033,560
Hiking	78%	76%	70%	6,318,959
<b>Kayaking (Any Type)</b>	100%	100%	100%	8,996,331
<b>Kayaking (Non-Whitewater)</b>	100%	100%	100%	8,996,331
Kayaking (Sit-On-Top)	100%	100%	100%	8,996,331
Kayaking (Tour/Sea)	47%	48%	30%	2,684,696
Kayaking (Whitewater)	17%	19%	16%	1,410,885
<b>Paddle sports (Any Type)</b>	100%	100%	100%	8,996,331
Rafting	23%	19%	15%	1,386,108
Snowshoeing	11%	10%	7%	619,242
Telemark Skiing	10%	5%	2%	160,355
Trail Running	44%	48%	37%	3,358,530

= Significant difference from 2003

# WHITEWATER KAYAKING\*: PARTICIPATION & FREQUENCY'S IMPACT ON TOTAL OUTINGS

Participation in whitewater kayaking is the lowest among all paddle sports. Just 1% of the population participate in whitewater kayaking which equals 2.2 million participants.

Number & Percentage of Participants



..... Rolling Trend Average

\*Sample size too small to show detailed data



OUTDOOR RECREATION PARTICIPATION STUDY

**ACTIVITIES TRACKED BUT NOT INCLUDED IN  
OUTDOOR PARTICIPATION TREND ANALYSIS**

OUTDOOR RECREATION PARTICIPATION STUDY  
**HUNTING\***

**"Have you gone hunting, using either a firearm or a bow, in the last 12 months?"**

# HUNTING: 26.4 MILLION PARTICIPANTS

## THE 2005 AMERICAN HUNTER

- Primarily male and Caucasian.
- Well represented across age groups (mean age of 36), marital status and children in household
- Most likely to live in the South Central and North Central regions.
- Seventy-six percent also participate in fishing.

### Year 2005 Events of Note

Hunters are predominately male living in the Central regions of the country and also participate in fishing.



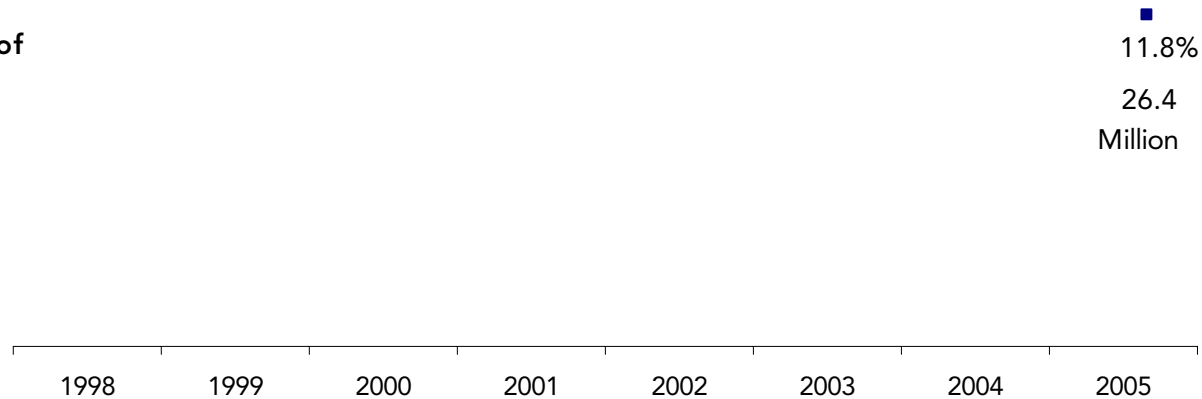
### Observation/Implication

Encourage hunters to try other activities through their affinity with fishing.

# HUNTING: PARTICIPATION

Hunting was added to the participation study for the first time in 2005. Twelve percent of Americans 16 and older indicate that they participate in hunting with either a firearm or bow in 2005. This translates to 26.4 million Americans.

**Number & Percentage of  
Participants**



■  
11.8%  
26.4  
Million

# HUNTING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

The hunting population is predominately male (85%) and Caucasian (83%). 69% of hunters live in the central region of the U.S. – South Central and North Central. Hunters are well represented among all age groups, marital status and children in the household.

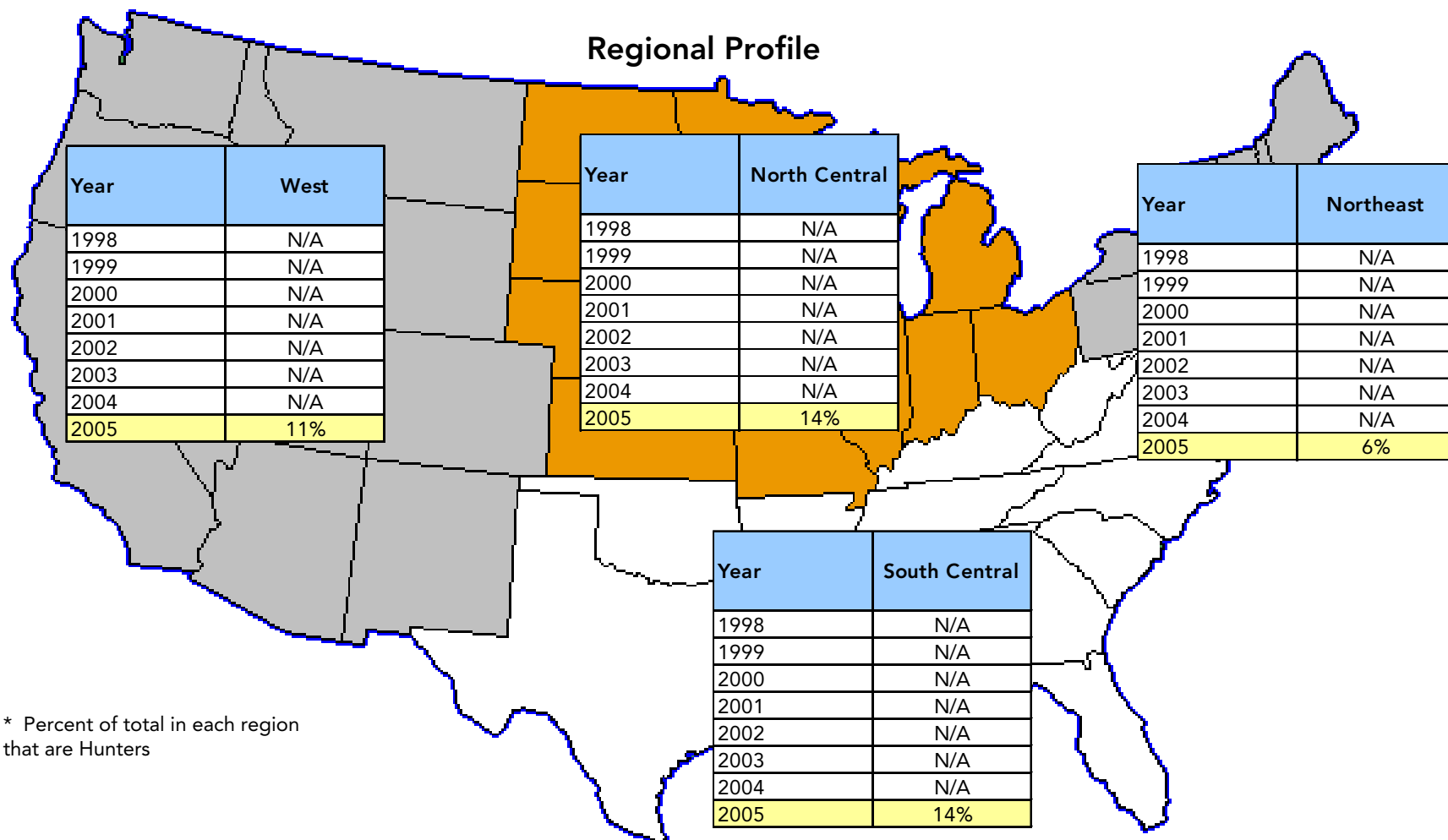
## Demographic Profile

Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	N/A	N/A	N/A	N/A	N/A	N/A	N/A	85%
Female	N/A	N/A	N/A	N/A	N/A	N/A	N/A	15%
<b>Age</b>								
16 to 24	N/A	N/A	N/A	N/A	N/A	N/A	N/A	30%
25 to 34	N/A	N/A	N/A	N/A	N/A	N/A	N/A	25%
35 to 44	N/A	N/A	N/A	N/A	N/A	N/A	N/A	16%
45+	N/A	N/A	N/A	N/A	N/A	N/A	N/A	28%
<b>Marital Status</b>								
Married	N/A	N/A	N/A	N/A	N/A	N/A	N/A	51%
Unmarried	N/A	N/A	N/A	N/A	N/A	N/A	N/A	49%
<b>Ethnicity</b>								
Caucasian	NA	NA	NA	NA	NA	N/A	N/A	83%
African-American	NA	NA	NA	NA	NA	N/A	N/A	3%
Hispanic	NA	NA	NA	NA	NA	N/A	N/A	9%
Asian	NA	NA	NA	NA	NA	N/A	N/A	0%
Other	NA	NA	NA	NA	NA	N/A	N/A	9%
<b>Children &lt;18</b>								
Yes	N/A	N/A	N/A	N/A	N/A	N/A	N/A	55%
<b>Household Income</b>								
<\$40k	N/A	N/A	N/A	N/A	N/A	N/A	N/A	34%
\$40k - \$79k	N/A	N/A	N/A	N/A	N/A	N/A	N/A	43%
\$80k+	N/A	N/A	N/A	N/A	N/A	N/A	N/A	23%
<b>Region</b>								
Northeast	N/A	N/A	N/A	N/A	N/A	N/A	N/A	10%
South Central	N/A	N/A	N/A	N/A	N/A	N/A	N/A	42%
North Central	N/A	N/A	N/A	N/A	N/A	N/A	N/A	27%
West	N/A	N/A	N/A	N/A	N/A	N/A	N/A	21%

\*Ethnicity: Will not add to 100%, see page 239 for details.

# HUNTING: WHERE PARTICIPANTS LIVE\*

The North Central and South Central regions have the greatest percentage of hunters among the population. Fourteen percent of those living in the North Central and South Central regions are hunters compared to 12% of the population nationally.



\* Percent of total in each region that are Hunters

# HUNTING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

The largest crossover sport among hunters is fishing. Over three-quarters of hunters also fish. Close to half of hunters also participate in motorized off-road activities.

## Crossover Activities

Activities	Hunting in 2003	Hunting In 2004	Hunting in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	N/A	N/A	15%	4,026,612
<b>Bicycling (Any Type)</b>	N/A	N/A	41%	10,864,711
Bicycling (Paved Road)	N/A	N/A	34%	9,017,025
<b>Bicycling (Mountain)</b>	N/A	N/A	28%	7,461,077
Bicycling (Single Track)	N/A	N/A	21%	5,429,385
Bicycling (Dirt Road)	N/A	N/A	23%	6,046,965
Bird Watching	N/A	N/A	13%	3,500,291
<b>Camping (Any Type)</b>	N/A	N/A	56%	14,891,209
Camping (Away from Car)	N/A	N/A	22%	5,727,649
Camping (Car)	N/A	N/A	38%	10,124,793
Canoeing	N/A	N/A	21%	5,625,683
<b>Climbing (Any Type)</b>	N/A	N/A	6%	1,513,082
Climbing (Artificial Wall)	N/A	N/A	3%	764,805
Climbing (Natural Rock)	N/A	N/A	5%	1,229,703
Climbing (Ice)	N/A	N/A	0%	122,904
Cross-Country/Nordic Skiing	N/A	N/A	5%	1,245,081
<b>Fishing (Any Type)</b>	N/A	N/A	76%	20,140,380
Fishing (Fly)	N/A	N/A	21%	5,444,844
Fishing (Non-Fly)	N/A	N/A	72%	18,968,611
Hiking	N/A	N/A	44%	11,544,234
<b>Kayaking (Any Type)</b>	N/A	N/A	8%	2,152,200
<b>Kayaking (Non-Whitewater)</b>	N/A	N/A	8%	1,991,724
Kayaking (Sit-On-Top)	N/A	N/A	4%	1,180,218
Kayaking (Tour/Sea)	N/A	N/A	5%	1,255,361
Kayaking (Whitewater)	N/A	N/A	3%	811,506
<b>Paddle sports (Any Type)</b>	N/A	N/A	29%	7,743,775
Rafting	N/A	N/A	9%	2,290,482
Snowshoeing	N/A	N/A	5%	1,204,136
Telemark Skiing	N/A	N/A	1%	382,455
Trail Running	N/A	N/A	25%	6,651,190
Motorized Off-Road	N/A	N/A	49%	12,959,073

OUTDOOR RECREATION PARTICIPATION STUDY

# MOTORIZED OFF-ROAD ACTIVITIES

"Have you participated in any motorized off-road activities in the past 12 months? Off-road activities might include ATV riding, dirt biking or four wheeling or jet ski.

MOTORIZED OFF-ROAD



# MOTORIZED OFF-ROAD: 42.4 MILLION PARTICIPANTS, 1.2 BILLION OUTINGS

## THE 2005 AMERICAN MOTORIZED OFF-ROAD ACTIVITY PARTICIPANT

- Primarily male
- Mean age of 34 years
- Least likely to live in the Northeast region
- Participate in fishing (non-fly), camping, bicycling (paved road), and hiking
- Averaged 28 motorized outings in 2005
- Just 12% limited their activity to only a single outing during the year

## MAJOR TRENDS IN MOTORIZED OFF-ROAD ACTIVITIES

Although participation in motorized off-road activities has remained stable over the past three years, the average number of annual outings has increased from 16 in 2003 to 28 in 2005 resulting in approximately 600 million more outings than two years ago.

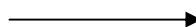
- Ethnicity: The motorized off-road population has become more diverse since 2003. In 2005, motorized off-road participants were less likely to be Caucasian. Both the Hispanic and African American populations have increased directionally.
- Region: A greater percentage of those living in the Western region participated in motorized off-road activities in 2005 than they did in 2003.

### Year 2005 Events of Note

Motorized off-road participants are becoming more active.

### Observation/Implication

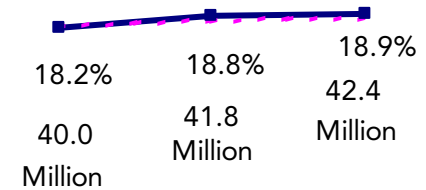
Opportunity to balance needs of all recreation participants.



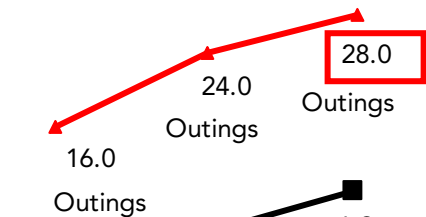
# MOTORIZED OFF-ROAD: PARTICIPATION & FREQUENCY'S IMPACT ON TOTAL OUTINGS

Over the past three years, participation in motorized off-road activities has remained stable at approximately 40 million Americans. However, average outings have increased significantly from 16 annual outings in 2003 to 28 annual outings in 2005. This has dramatically increased total motorized off-road outings from 600 million in 2003 to 1.2 billion in 2005.

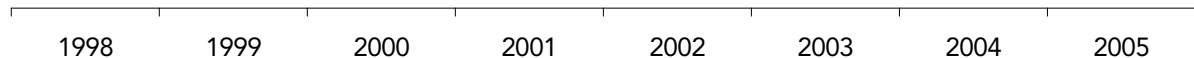
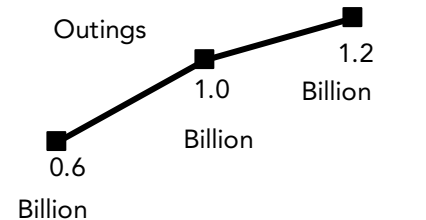
Number & Percentage of Participants



Average Number of Outings



Total Number of Outings



..... Rolling Trend Average  
 = Significant difference from 2003

# MOTORIZED OFF-ROAD: FREQUENCY OF PARTICIPATION

During 2005, 39% of Americans who participate in motorized off-road activities took 11 or more outings. A larger percentage of these Americans took over 100 outings in 2005 than in 2003. This increased the average outings to 28 from 16 in 2003 which resulted in 1.2 billion total motorized off-road outings for 2005, double the amount in 2003.

## Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	N/A	N/A	N/A	N/A	N/A	14%	13%	12%
2 times	N/A	N/A	N/A	N/A	N/A	15%	14%	14%
3 to 6 times	N/A	N/A	N/A	N/A	N/A	27%	28%	27%
7 to 10 times	N/A	N/A	N/A	N/A	N/A	9%	9%	8%
<b>11 or more times (NET)</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>35%</b>	<b>36%</b>	<b>39%</b>
11 to 15 times	N/A	N/A	N/A	N/A	N/A	9%	9%	9%
16 to 30 times	N/A	N/A	N/A	N/A	N/A	13%	12%	13%
31 to 50 times	N/A	N/A	N/A	N/A	N/A	8%	4%	7%
51 to 100 times	N/A	N/A	N/A	N/A	N/A	4%	7%	4%
101 or more times	N/A	N/A	N/A	N/A	N/A	2%	4%	6%
<b>Average Frequency</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>16.0</b>	<b>24.0</b>	<b>28.0</b>
<b>Total Outings (Billions)</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>N/A</b>	<b>0.6</b>	<b>1.0</b>	<b>1.2</b>

= Significant difference from 2003

# MOTORIZED OFF-ROAD: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

The motorized off-road participant is more ethnically diverse in 2005 than in 2003 with a directional increase in the Hispanic and African American populations. Participants in 2005 also are more affluent than in 2003. The majority of participants are male and under the age of 35. The South Central and West regions have the greatest percentage of motorized off-road participants.

## Demographic Profile

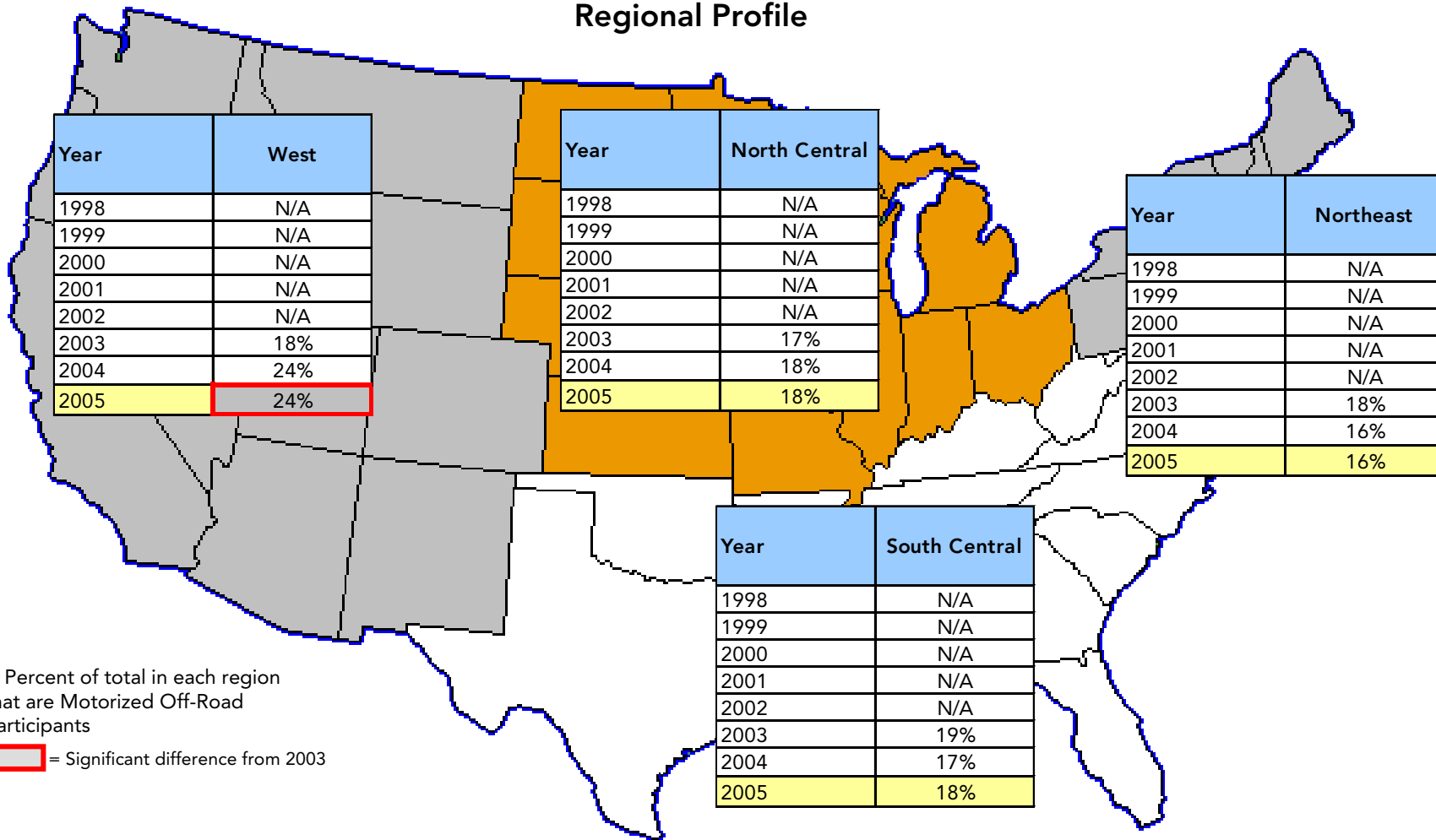
Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	N/A	N/A	N/A	N/A	N/A	61%	65%	68%
Female	N/A	N/A	N/A	N/A	N/A	39%	35%	32%
<b>Age</b>								
16 to 24	N/A	N/A	N/A	N/A	N/A	36%	39%	36%
25 to 34	N/A	N/A	N/A	N/A	N/A	23%	21%	21%
35 to 44	N/A	N/A	N/A	N/A	N/A	19%	20%	19%
45+	N/A	N/A	N/A	N/A	N/A	23%	21%	24%
<b>Marital Status</b>								
Married	N/A	N/A	N/A	N/A	N/A	45%	45%	47%
Unmarried	N/A	N/A	N/A	N/A	N/A	55%	55%	52%
<b>Ethnicity</b>								
Caucasian	NA	NA	NA	NA	NA	88%	83%	79%
African-American	NA	NA	NA	NA	NA	4%	3%	7%
Hispanic	NA	NA	NA	NA	NA	8%	11%	13%
Asian	NA	NA	NA	NA	NA	0%	1%	0%
Other	NA	NA	NA	NA	NA	2%	5%	7%
<b>Children &lt;18</b>								
Yes	N/A	N/A	N/A	N/A	N/A	56%	50%	53%
<b>Household Income</b>								
<\$40k	NA	N/A	N/A	N/A	N/A	42%	34%	28%
\$40k - \$79k	NA	N/A	N/A	N/A	N/A	38%	42%	49%
\$80k+	NA	N/A	N/A	N/A	N/A	20%	23%	23%
<b>Region</b>								
Northeast	N/A	N/A	N/A	N/A	N/A	19%	16%	16%
South Central	N/A	N/A	N/A	N/A	N/A	37%	32%	32%
North Central	N/A	N/A	N/A	N/A	N/A	21%	22%	21%
West	N/A	N/A	N/A	N/A	N/A	23%	30%	31%

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

# MOTORIZED OFF-ROAD: WHERE PARTICIPANTS LIVE\*

The Western region has the greatest percentage (24%) of motorized off-road participants among its population. Participation also has increased in this region since 2003.

## Regional Profile



\* Percent of total in each region that are Motorized Off-Road Participants

= Significant difference from 2003

# MOTORIZED OFF-ROAD: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Fishing (non-fly), camping, bicycling and hiking are the activities that motorized off-road participants are most likely to have also participated in during 2005.

## Crossover Activities

Activities	Motorized Off Road in 2003	Motorized Off Road in 2004	Motorized Off Road in 2005	Size of 2005 Crossover Participation Populations (Millions)
<b>Backpacking</b>	10%	16%	13%	5,491,377
<b>Bicycling (Any Type)</b>	49%	53%	51%	21,788,846
Bicycling (Paved Road)	45%	47%	46%	19,659,843
<b>Bicycling (Mountain)</b>	36%	42%	38%	16,262,878
Bicycling (Single Track)	30%	35%	33%	13,804,192
Bicycling (Dirt Road)	28%	34%	31%	13,265,636
Bird Watching	11%	9%	9%	3,880,921
<b>Camping (Any Type)</b>	62%	57%	54%	22,981,597
Camping (Away from Car)	17%	19%	18%	7,636,269
Camping (Car)	46%	40%	39%	16,348,659
Canoeing	19%	18%	18%	7,648,975
<b>Climbing (Any Type)</b>	8%	9%	9%	3,769,004
Climbing (Artificial Wall)	6%	6%	7%	2,806,247
Climbing (Natural Rock)	6%	5%	6%	2,371,847
Climbing (Ice)	0%	2%	0%	123,112
Cross-Country/Nordic Skiing	7%	9%	3%	1,459,332
<b>Fishing (Any Type)</b>	N/A	62%	63%	26,732,777
Fishing (Fly)	12%	17%	16%	6,709,001
Fishing (Non-Fly)	N/A	60%	61%	25,772,810
Hiking	50%	57%	48%	20,419,331
<b>Kayaking (Any Type)</b>	7%	10%	10%	4,387,645
<b>Kayaking (Non-Whitewater)</b>	7%	9%	10%	4,066,150
Kayaking (Sit-On-Top)	4%	7%	7%	2,830,893
Kayaking (Tour/Sea)	4%	5%	6%	2,337,187
Kayaking (Whitewater)	1%	3%	3%	1,169,222
<b>Paddle sports (Any Type)</b>	27%	29%	27%	11,616,457
Rafting	10%	12%	11%	4,617,216
Snowshoeing	5%	6%	4%	1,819,284
Telemark Skiing	3%	5%	1%	605,354
Trail Running	20%	32%	29%	12,458,136
Hunting	N/A	N/A	33%	13,892,125

= Significant difference from 2003

OUTDOOR RECREATION PARTICIPATION STUDY

# COMPETITIVE PARTICIPATION IN OUTDOOR ACTIVITIES

**"In the past 12 months have you participated in ANY of the activities that we asked about COMPETITIVELY?"**

*Those activities include camping, hiking, backpacking, climbing with rope and harness, trail running, canoeing, rafting, kayaking, snowshoeing, cross-country skiing, telemark skiing, bicycling, bird watching or fishing.*

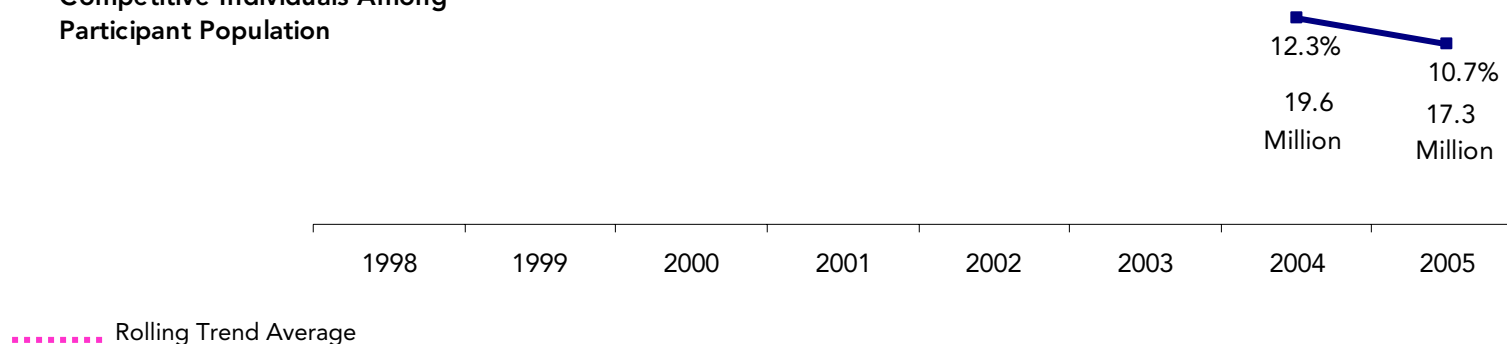
COMPETITIVE PARTICIPATION

# COMPETITIVE PARTICIPATION IN OUTDOOR ACTIVITIES

Americans who participate in outdoor activities, typically do so non-competitively (89.3%). Just 10.7% of Participants report that their involvement with outdoor activities has included an aspect of competition.

Notably, many of the outdoor activities are not well-suited or readily accepted as competitive activities—indicating that the population of over 17 million outdoor activity competitors should not be minimized.

**Number & Percentage of Competitive Individuals Among Participant Population**





# COMPETITIVE PARTICIPATION: DEMOGRAPHIC PROFILE TRENDS

Males are more likely than females to participate competitively. One in five (21,1%)\*\* of 16 to 24 year-old Participants is a past-year competitor—the highest incidence of any age group. Caucasians make up a large percentage of competitive participants (70%). One in ten competitors are African American and 18% are Hispanic.

## Demographic Profile

Participants	1998	1999	2000	2001	2002	2003	2004	2005
<b>Gender</b>								
Male	N/A	N/A	N/A	N/A	N/A	N/A	75%	76%
Female	N/A	N/A	N/A	N/A	N/A	N/A	25%	24%
<b>Age</b>								
16 to 24	N/A	N/A	N/A	N/A	N/A	N/A	48%	50%
25 to 34	N/A	N/A	N/A	N/A	N/A	N/A	21%	16%
35 to 44	N/A	N/A	N/A	N/A	N/A	N/A	13%	13%
45+	N/A	N/A	N/A	N/A	N/A	N/A	17%	21%
<b>Marital Status</b>								
Married	N/A	N/A	N/A	N/A	N/A	N/A	37%	37%
Unmarried	N/A	N/A	N/A	N/A	N/A	N/A	63%	63%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	N/A	74%	70%
African-American	N/A	N/A	N/A	N/A	N/A	N/A	8%	10%
Hispanic	N/A	N/A	N/A	N/A	N/A	N/A	15%	18%
Asian	N/A	N/A	N/A	N/A	N/A	N/A	2%	1%
Other	N/A	N/A	N/A	N/A	N/A	N/A	9%	10%
<b>Children &lt;18</b>								
Yes	N/A	N/A	N/A	N/A	N/A	N/A	51%	57%
<b>Household Income</b>								
<\$40k	NA	N/A	N/A	N/A	N/A	N/A	38%	30%
\$40k - \$79k	NA	N/A	N/A	N/A	N/A	N/A	37%	39%
\$80k+	NA	N/A	N/A	N/A	N/A	N/A	25%	31%
<b>Region</b>								
Northeast	N/A	N/A	N/A	N/A	N/A	N/A	19%	18%
South Central	N/A	N/A	N/A	N/A	N/A	N/A	36%	31%
North Central	N/A	N/A	N/A	N/A	N/A	N/A	17%	22%
West	N/A	N/A	N/A	N/A	N/A	N/A	28%	29%

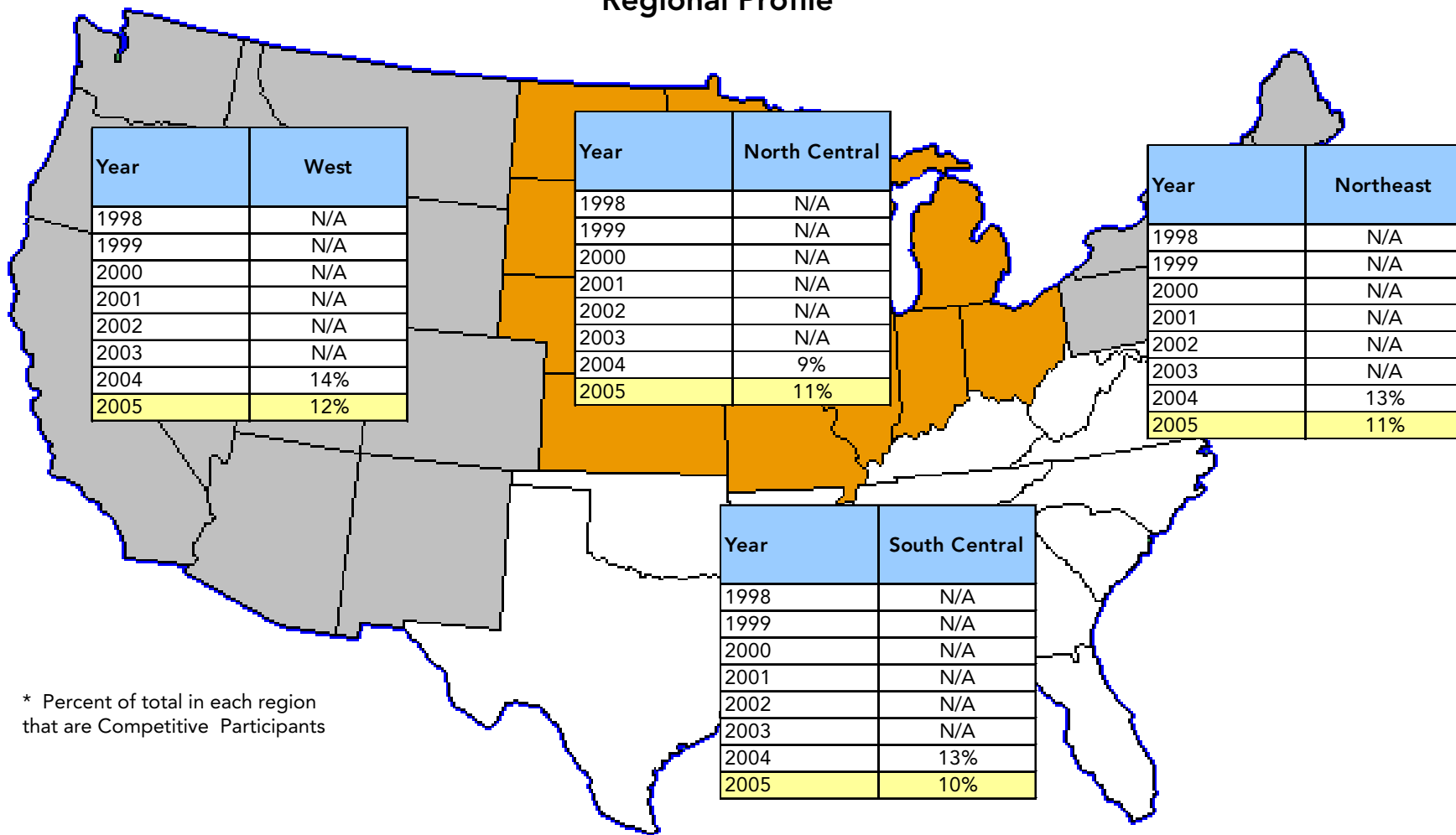
\*Ethnicity: Will not add to 100%, see page 239 for details.

\*\*Data not shown on page

# COMPETITIVE PARTICIPATION: WHERE THEY LIVE\*

Competitors are well distributed across each region. A slightly greater percentage of Westerners are competitors compared to the population nationally.

## Regional Profile



\* Percent of total in each region that are Competitive Participants

# COMPETITIVE PARTICIPATION: BY ACTIVITY

Participants who compete in at least one of their outdoor sports are involved in a variety of outdoor activities. Please note that participation in the activity does not mean that they are competitive in that activity.

## Competitor's Participation in Human-Powered Activities

Activities	Percentage of Competitive by Activity in 2004	Percentage of Competitive by Activity in 2005
<b>Backpacking</b>	<b>17%</b>	<b>18%</b>
<b>Bicycling (Any Type)</b>	<b>65%</b>	<b>67%</b>
Bicycling (Paved Road)	59%	61%
<b>Bicycling (Mountain)</b>	<b>50%</b>	<b>45%</b>
Bicycling (Single Track)	42%	38%
Bicycling (Dirt Road)	40%	37%
Bird Watching	7%	10%
<b>Camping (Any Type)</b>	<b>53%</b>	<b>55%</b>
Camping (Away from Car)	17%	21%
Camping (Car)	35%	35%
Canoeing	22%	19%
<b>Climbing (Any Type)</b>	<b>10%</b>	<b>15%</b>
Climbing (Artificial Wall)	7%	11%
Climbing (Natural Rock)	7%	8%
Climbing (Ice)	2%	2%
Cross-Country/Nordic Skiing	12%	11%
<b>Fishing (Any Type)</b>	<b>58%</b>	<b>65%</b>
Fishing (Fly)	15%	17%
Fishing (Non-Fly)	56%	63%
Hiking	50%	55%
<b>Kayaking (Any Type)</b>	<b>9%</b>	<b>12%</b>
<b>Kayaking (Non-Whitewater)</b>	<b>9%</b>	<b>11%</b>
Kayaking (Sit-On-Top)	6%	8%
Kayaking (Tour/Sea)	6%	7%
Kayaking (Whitewater)	2%	4%
<b>Paddle sports (Any Type)</b>	<b>30%</b>	<b>31%</b>
Rafting	15%	12%
Snowshoeing	6%	4%
Telemark Skiing	7%	4%
Trail Running	45%	50%

OUTDOOR RECREATION PARTICIPATION STUDY  
**ADVENTURE/SPORTS/  
OUTDOOR ACTIVITY TRAVEL**

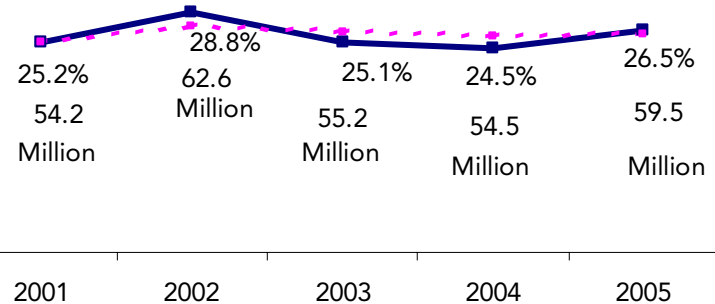
**"In 2004 did you take a vacation where the primary purpose was to experience an outdoor adventure or adventurous activity?"**

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

# ADVENTURE/SPORTS TRAVEL: PARTICIPANTS

Adventure/outdoor travel has remained relatively stable over the past five years. Approximately one quarter, or 59.5 million, of Americans 16 and older took a vacation where the the primary purpose was to participate in an adventure or outdoor activity.

Number & Percentage of Adventure/Sport Travelers



..... Rolling Trend Average

# ADVENTURE/SPORTS TRAVELER ACTIVITIES

A wide variety of activities inspired adventure/outdoor activity vacations in 2005. Four activities were the most popular among traveling Americans in 2005—swimming (11.6 million Americans 16 and older), hiking/backpacking (10.5 million), fishing (8.1 million), and camping (8.1 million).

Participation in swimming, camping and boating on vacation all increased in 2005 compared to 2003.

## Activities Pursued in Adventure/Sports Travel

Outdoor Activities	Adventure/Outdoor Travelers in 2003	Adventure/Outdoor Travelers in 2004	Adventure/Outdoor Travelers in 2005	Number of Adventure/Outdoor Travelers in 2005
Swimming	15%	17%	20%	11,599,868
Hiking/Backpacking	18%	17%	18%	10,511,679
Fishing	15%	15%	14%	8,151,048
Camping	11%	14%	14%	8,148,273
Walking	8%	11%	10%	6,137,374
Golf	8%	8%	9%	5,524,368
Hunting/Shooting	5%	5%	6%	3,742,754
Alpine skiing (downhill)	5%	7%	5%	3,099,093
Bicycling	4%	4%	5%	2,896,230
Boating	3%	3%	4%	2,563,739
Jogging/Running	2%	3%	3%	1,716,775
Snorkeling	1%	4%	3%	1,576,331
Motorized Off-Road	2%	2%	2%	1,236,649
Rafting	2%	2%	2%	1,211,727
Canoeing	3%	2%	2%	1,195,708
Snowboarding	2%	2%	2%	1,189,117

\* Percentages based on Americans who traveled on an adventure/outdoor activity vacation.   = Significant difference from 2003

# ADVENTURE/SPORTS TRAVELERS: DEMOGRAPHIC PROFILE TRENDS

Males are more likely than females to be adventure/outdoor travelers. One-third of travelers are over the age of 45 and over half are married.

## Demographic Profile

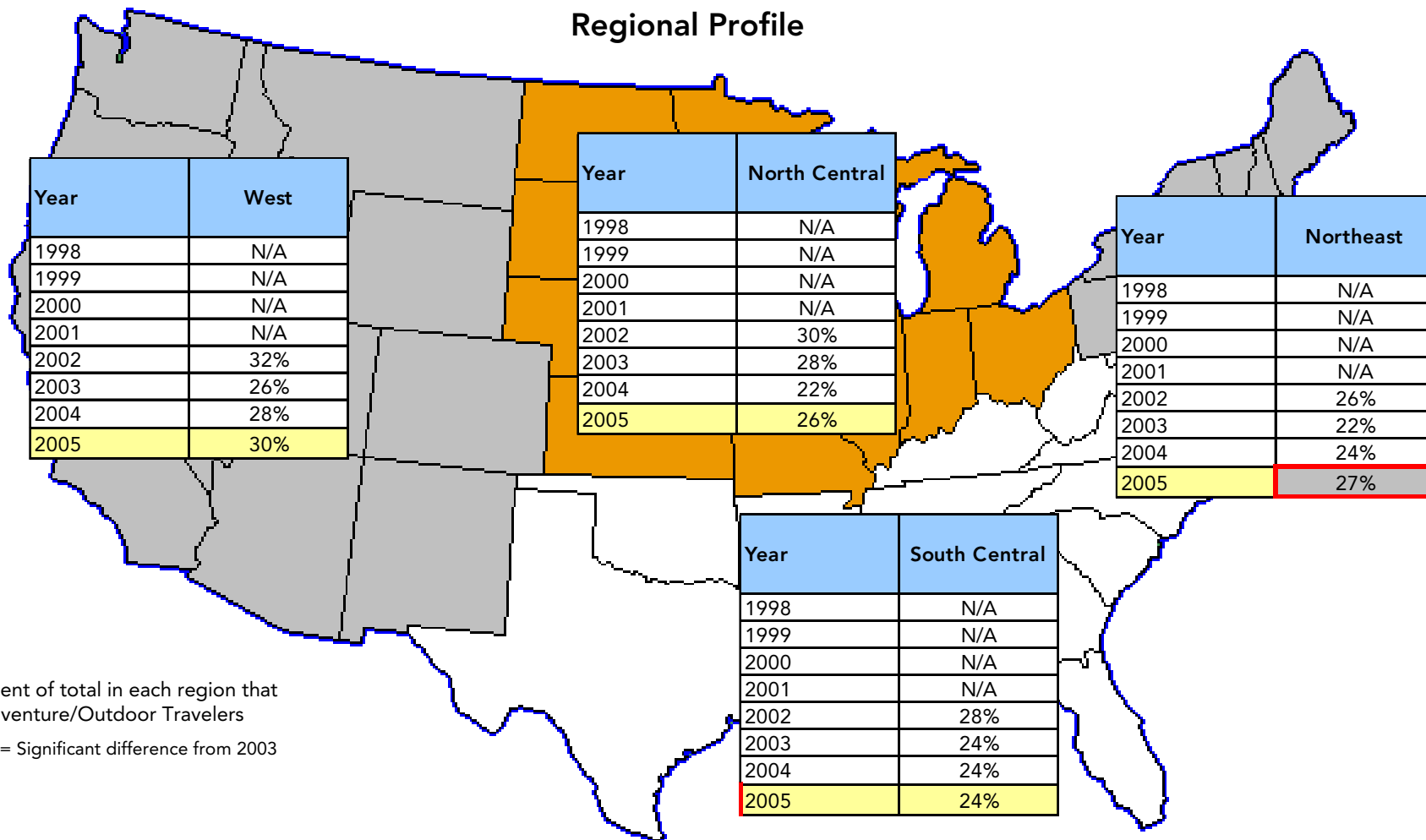
<b>Adventure/Outdoor Travelers</b>	<b>1998</b>	<b>1999</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>
<b>Gender</b>								
Male	N/A	N/A	N/A	N/A	55%	58%	58%	57%
Female	N/A	N/A	N/A	N/A	45%	42%	42%	43%
<b>Age</b>								
16 to 24	N/A	N/A	N/A	N/A	25%	25%	28%	26%
25 to 34	N/A	N/A	N/A	N/A	19%	19%	19%	20%
35 to 44	N/A	N/A	N/A	N/A	20%	20%	21%	21%
45+	N/A	N/A	N/A	N/A	35%	35%	32%	33%
<b>Marital Status</b>								
Married	N/A	N/A	N/A	N/A	52%	54%	52%	54%
Unmarried	N/A	N/A	N/A	N/A	48%	46%	48%	45%
<b>Ethnicity</b>								
Caucasian	N/A	N/A	N/A	N/A	N/A	83%	79%	81%
African-American	N/A	N/A	N/A	N/A	N/A	6%	6%	7%
Hispanic	N/A	N/A	N/A	N/A	N/A	7%	12%	10%
Asian	N/A	N/A	N/A	N/A	N/A	2%	2%	1%
Other	N/A	N/A	N/A	N/A	N/A	4%	6%	5%
<b>Children &lt;18</b>								
Yes	N/A	N/A	N/A	N/A	43%	49%	52%	51%
<b>Household Income</b>								
<\$40k	N/A	N/A	N/A	N/A	31%	33%	30%	28%
\$40k - \$79k	N/A	N/A	N/A	N/A	43%	42%	42%	42%
\$80k+	N/A	N/A	N/A	N/A	26%	25%	28%	30%
<b>Region</b>								
Northeast	N/A	N/A	N/A	N/A	17%	16%	18%	19%
South Central	N/A	N/A	N/A	N/A	33%	34%	34%	32%
North Central	N/A	N/A	N/A	N/A	25%	26%	20%	22%
West	N/A	N/A	N/A	N/A	25%	24%	27%	27%

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

# ADVENTURE/SPORTS TRAVELERS: WHERE PARTICIPANTS LIVE\*

Adventure/outdoor travelers are well distributed across each region. A slightly greater percentage of Westerners are adventure/outdoor travelers compared to the population nationally. More northeasterners are traveling in 2005 than did in 2003 or 2004.

## Regional Profile



\* Percent of total in each region that are Adventure/Outdoor Travelers

= Significant difference from 2003



OUTDOOR RECREATION PARTICIPATION STUDY  
**METHODOLOGY**

# METHODOLOGY OF THE PARTICIPATION STUDY

Data for this study were collected as part of the LeisureTRAK®, an on-going study of Americans' leisure time behavior and attitudes. For comparative purposes, the quarterly data collected for this report have been aggregated on an annual basis for each of the years shown – 1998/1999/2000/2001/2002/2003/2004/2005.

Specifics of the data collection efforts are as follows:

<b>Year</b>	<b>Number of Interviews</b>	<b>Data Collection Time Period</b>
1998	2,255	January/June/October
1999	3,026	February/June/September/November
2000	2,502	March/June/November
2001	4,000	March/June/September/December
2002	4,000	March/June/September/December
2003	4,000	March/June/September/December
2004	4,000	March/June/September/December
2005	4,000	March/June/September/December

Each quarter, telephone interviews are conducted using scientific sampling and random digit dial methodology to reach a representative sample of the American population, age 16 and over. A disproportionate stratified random sample by census region and gender is used for the study in order to ensure that there is an accurate representation from these subgroups. If necessary, weighting is used to match census data for age. A total of 1,000 interviews are conducted. Only Americans age 16 and older are interviewed. Interviewing for the LeisureTRAK® is spread over 14 consecutive days in each quarter.

The overall 2004 Participant 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 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 for each activity identified within the sample. As a general rule, consider that the higher the Participant incidence (for example, paved road bicycling, hiking, car camping), the lower the margin of error for the demographic profiles and crossover participation levels.

# METHODOLOGY OF THE PARTICIPATION STUDY

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.

<b>Populations</b>	<b>1998/99</b>	<b>2000</b>	<b>2001</b>	<b>2002</b>	<b>2003</b>	<b>2004</b>	<b>2005</b>
Total - Americans 16 and Older	210,605,000	213,454,000	215,123,000	217,443,000	219,748,000	222,080,000	224,095,442
Young Americans - 16 to 24	37,200,000	38,600,000	39,077,000	39,901,000	40,137,000	40,650,000	41,009,466
Female Americans - 16 and Older	107,714,000	110,514,000	111,400,000	112,569,000	113,734,000	114,914,000	115,956,879

Population size is derived from year-over-year estimates provided from the US Census Bureau. Estimates for 1998 through 2000 are based from the actual 2000 census estimates. Estimates from 2001 to 2005 are based on the American Community survey which excludes population living in institutions, college dormitories, and other group quarters. Therefore, although the US census states that the total population size in 2005 is 294.1M people we have excluded groups that would not be a part of a typical random digit dial survey.

It is important to note that the 2005 Census estimate reflects a .9% increase in the total U.S. population 16 and over compared to 2004. This increase has an impact on the projected populations of Outdoor Industry Foundation activities. When comparing the estimated activity populations across different years, consideration must be given to the fact that the 2005 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 sample that is too small for in-depth demographic profiling. There is no detailed Participant information available for Ice Climbing and Whitewater Kayaking due to the small sample sizes.

# METHODOLOGY OF THE PARTICIPATION STUDY

## Hispanic Population Defined

### Study Representation

The Participation Study captures only a subset of the entire U.S. Hispanic population cited in census statistics due to the following reasons.

- The study is conducted only in English.
- The study is conducted with one individual per household. Household size within the Hispanic population is larger than in the non-Hispanic population.\*

The Pew Hispanic Center estimates that 60% of U.S. Hispanics are either primarily English speakers (14%) or bilingual (46%).\*\* The data on Hispanics in this report is reflective of this group of individuals and is not reflective of the U.S. Hispanic population on the whole. The age distribution of this group of Hispanics differs from primarily Spanish speaking Hispanics. English speaking and bilingual Hispanics tend to skew younger than the primarily Spanish speaking Hispanic population. The Hispanic data is weighted to match this age distribution. The weighting is not reflective in the overall Participation numbers.

### Three Years Of Comparison

In 2003, the questions determining ethnic background were updated to more accurately reflect the way census data is gathered. Therefore, comparisons on ethnicity are not shown prior to 2003. Census data asks two questions to determine race and ethnicity. Hispanics by census definition are not a race but an ethnicity. Hispanics may be any race and people of every race can be Hispanic. The census questions are as follows:

- Race: What is your race?: Individuals are allowed to pick one or more of 15 different races. Hispanic is not an option.
- Ethnicity: Are you of Hispanic/Spanish/Latino descent?

Prior to 2003 the Participation Study only asked one question to determine both race and ethnicity:

- Are you white, African-American, Asian, or some other race? Individuals were allowed to choose only one response and were allowed to indicate if they were Hispanic .

In 2003 an additional question was added in order to capture a greater percentage of the Hispanic population.

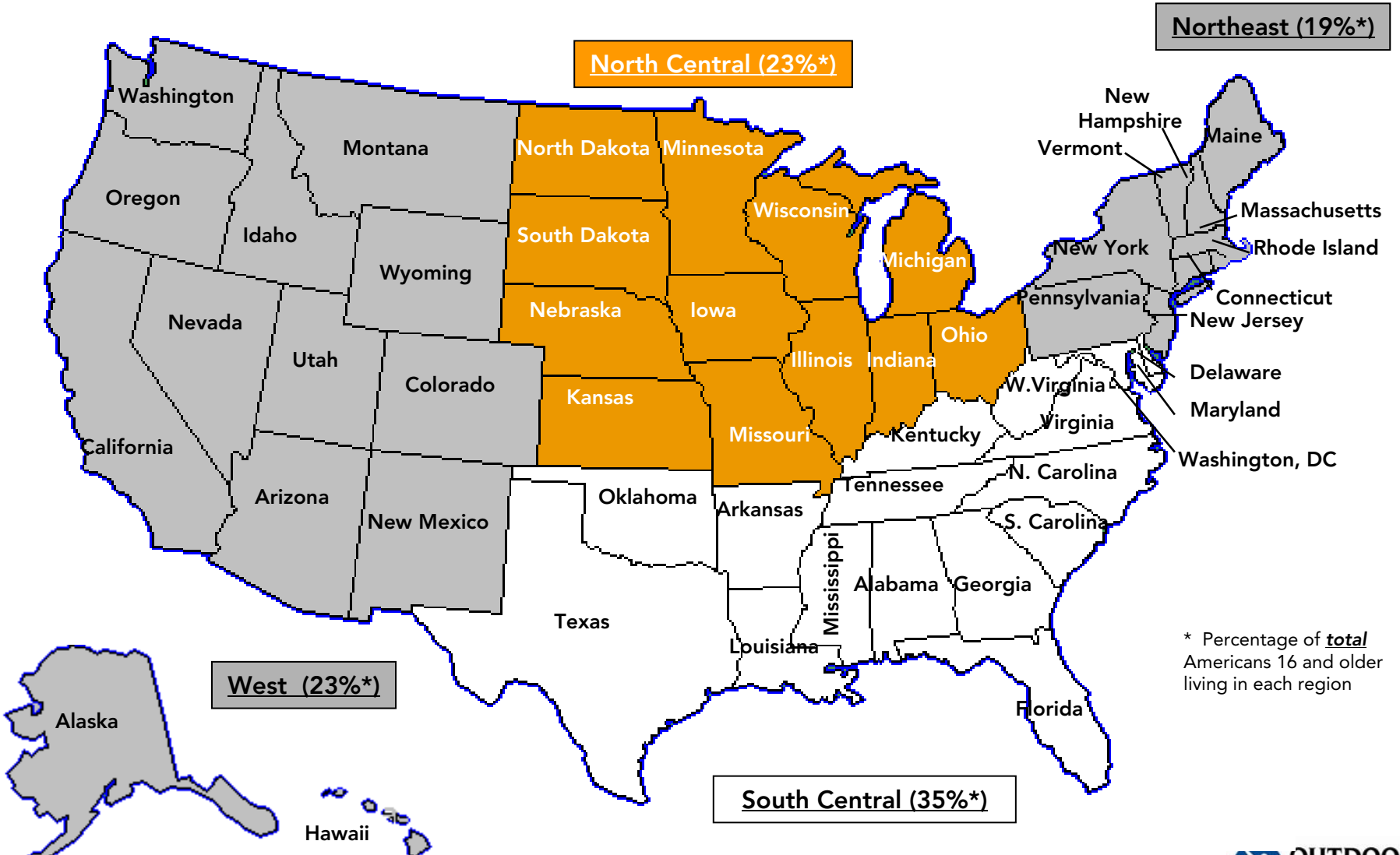
- Are you of Hispanic or Latino origin or descent?

\*Source: U.S. Census Bureau, Population Division, Fertility & Family Statistics Branch (2004)

\*\*Source: Pew Hispanic Center, Bilingualism, March (2004)

# METHODOLOGY OF THE PARTICIPATION STUDY

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



**Northeast (19%\*)**

**North Central (23%\*)**

**West (23%\*)**

**South Central (35%\*)**

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

# METHODOLOGY OF THE PARTICIPATION STUDY

## Question Overview

### **BACKPACKING**

**PARTICIPATION:** In the last 12 months, have you gone on an overnight backpacking trip more than one-quarter of a mile from your vehicle?

**FREQUENCY:** In the last 12 months, how many times have you gone on an overnight backpacking trip more than one-quarter of a mile from where you parked your vehicle? (Code actual number of times)

### **BICYCLING**

**PARTICIPATION:** Have you gone bicycling in the last 12 months?

**FREQUENCY:** How many times have you gone bicycling in the last 12 months? (Code actual number of times)—ADDED FOR Q3 & Q4 2005

**FREQUENCY:** In the last 12 months, how many times have you gone (read A-C)? (Code actual number of times)

- A. Bicycle riding off-pavement on a dirt single-track less than 5 feet wide
- B. Bicycle riding on a dirt road more than 5 feet wide
- C. Bicycle riding on a paved road

### **CAMPING**

**PARTICIPATION:** Have you gone camping where you have stayed overnight at least once in the last 12 months?

**FREQUENCY:** In the last 12 months, how many times have you gone camping where you have stayed overnight? (Code actual number of times)—ADDED FOR Q3 & Q4 2005

**TYPE:** When you camped out, were you more than one-quarter of a mile from your vehicle, or did you camp close to where you parked?

**FREQUENCY:** How many separate times in the last 12 months have you camped out at least one-quarter of a mile from where you parked your vehicle? (Code actual number of times)

**FREQUENCY:** How many separate times in the last 12 months have you camped where you parked your vehicle? (Open-ended and code actual number of times)

# METHODOLOGY OF THE PARTICIPATION STUDY

## **CAMPING (CONTINUED)**

WHO: Who do you usually camp with when you camp out at least one-quarter of a mile from where you park your vehicle? Do you camp with: (READ LIST – ALL THAT APPLY)

WHO: Who do you usually camp with when you camp where you park your vehicle? Do you camp with: (READ LIST – ALL THAT APPLY)

- No one – camp alone
- Your Parents
- Your Children
- Friend(s)
- Spouse/Significant Other
- Business associates/clients
- Other family members
- Organized Group or Club
- Someone else (specify)

## **CANOEING**

PARTICIPATION: In the last 12 months, have you gone Canoeing?

FREQUENCY: In the last 12 months, how many times have you been Canoeing? (Code actual number of times)

## **CROSS-COUNTRY/NORDIC SKIING**

PARTICIPATION: During the 2004/05 – winter season did you go Cross-country/Nordic Skiing?

FREQUENCY: During the winter of 2004/2005, how many times did you go Cross-country/Nordic Skiing? (Code actual number of times)

## **HIKING**

PARTICIPATION: Have you gone hiking on a trail in the last 12 months?

FREQUENCY: How many times have you gone hiking on a trail in the last 12 months? (Code actual number of times)

## **RAFTING**

PARTICIPATION: In the last 12 months, have you gone Rafting?

FREQUENCY: In the last 12 months, how many times have you been Rafting? (Code actual number of times)

# METHODOLOGY OF THE PARTICIPATION STUDY

## SNOWSHOEING

PARTICIPATION: During the 2004/05 – winter season did you go Snowshoeing?

FREQUENCY: During the winter of 2004/2005, how many times did you go Snowshoeing? (Code actual number of times)

## TELEMARK SKIING

PARTICIPATION: During the 2004/05 – winter season did you go Telemark Skiing, that is downhill with Telemark bindings that allow a free-heeled skiing experience?

FREQUENCY: During the winter of 2004/2005, how many times did you go Telemark Skiing? (Code actual number of times)

## TRAIL RUNNING

PARTICIPATION: Have you gone running on a non-paved trail in the last 12 months?

FREQUENCY: How many times have you gone running on a non-paved trail in the last 12 months? (Code actual number of times)

## BIRD WATCHING

PARTICIPATION: Have you gone on a Bird Watching excursion that involved traveling more than one-quarter of a mile from your home in the past 12 months?

FREQUENCY: How many times have you gone on a Bird Watching excursion more than one-quarter of a mile from your home in the last 12 months? (Code actual number of times)

## CLIMBING

PARTICIPATION: Have you gone climbing with a rope and a harness in the last 12 months?

FREQUENCY: In the last 12 months, how many times have you gone climbing with a rope and a harness? (Code actual number of times) – **ADDED FOR Q3 & Q4 2005**

FREQUENCY: In the last 12 months, how many times have you gone (read A-C)? (Code actual number of times)

- A. Climbing with a rope and harness on an artificial climbing wall?
- B. Climbing with a rope and harness on a natural rock surface outside?
- C. Climbing with an ice axe on an extremely steep or vertical ice surface?



# METHODOLOGY OF THE PARTICIPATION STUDY

## FISHING

**PARTICIPATION:** Have you gone fishing in the last 12 months?

**FREQUENCY:** In the last 12 months, how many times have you gone fishing? (Code actual number of times)–ADDED FOR Q3 & Q4 2005

**FREQUENCY:** In the last 12 months, how many times have you gone (read A-B)? (Code actual number of times)

- A. Fly-fishing – that is, where you use a rod and reel that is specifically designed for fly-fishing? Before responding please consider that fly-fishing is different than spin-cast fishing where you might use live bait.
- B. Any type of fishing OTHER than fly-fishing?

## KAYAKING

**PARTICIPATION:** In the last 12 months, have you gone kayaking?

**FREQUENCY:** How many times have you gone kayaking in the last 12 months? (Code actual number of times)–ADDED FOR Q3 & Q4 2005

**FREQUENCY:** In the last 12 months, how many times have you gone (read A-C) (Code actual number of times)

- A. Touring/Sea kayaking
- B. Whitewater kayaking
- C. Recreation/Sit On Top kayaking

## HUNTING

**PARTICIPATION:** Have you gone hunting, using either a firearm or bow, in the last 12 months?

## MOTORIZED OFF-ROAD ACTIVITY

**PARTICIPATION:** Have you participated in any motorized off-road activities in the past 12 months? Off-road activities might include ATV riding, dirt biking or four wheeling or Jet Ski.

**FREQUENCY:** How many times have you participated in motorized off-road activities in the last 12 months? (Code actual number of times)

## COMPETITIVE

**PARTICIPATION:** In the past 12 months have you participated in ANY of the activities that we asked about competitively?

## VACATION/ADVENTURE TRAVEL

**PARTICIPATION:** In the last 12 months, have you taken a vacation where the primary purpose was to play a sport or to experience an outdoor or adventurous activity?

**TYPE:** Which sport or outdoor activity did you participate in during the vacation?

# METHODOLOGY OF THE PARTICIPATION STUDY

In the third and fourth quarter of 2005, five questions were added to the study. These questions asked the frequency of participation for five major categories (Bicycling, Camping, Climbing, Fishing, Kayaking).

**Example: “How many times have you gone bicycling in the last 12 months?”**

Past reports have included total outings for these major categories by summing the minor subcategories as follows:

- Bicycling: Paved Road Biking, Off-Road, Single Track Dirt
- Camping: Camping Away From Car, Car Camping
- Climbing: Natural Rock Climbing, Artificial Wall Climbing, Ice Climbing
- Fishing: Fly Fishing, Fishing Non Fly
- Kayaking: Recreational/Sit-on-Top Kayaking, Sea/Touring Kayaking, Whitewater Kayaking

A comparison of the results of the data indicate that individuals recollection of their total outings for a Camping and Fishing are similar to the their recollection of their total outings for subcategories. For Bicycling, individuals tended to either underestimate their total outings or overestimate the outings per subcategory. The sample size for Climbing and Kayaking is too small to report.

For trending purposes, the study continued to report subcategory summation in results.

# METHODOLOGY OF THE PARTICIPATION STUDY

## Category Explanations

This page and the next provide additional information on select activities presented in the report.

### Hunting

Hunting has been added to the study for the first time in this edition. Hunting was added to provide additional information on activities participated in the out-of-doors. Hunting participation was only asked in the first and third quarter of 2005. Frequency of hunting was not included in this study. Hunting is not included as part of overall participation in outdoor activities.

### Fishing (Non Fly)

The activity of fishing (non-fly) was added to the study in 2004. For this study, "Fishing (non fly)" has been defined as "...Any kind of fishing other than fly fishing". The addition of Fishing (non fly) brings the total number of activities tracked by this study to twenty-two (vs. twenty one in the Sixth edition).

### 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.

### Competitive Participation

Competitive participation in any one of the tracked outdoor outdoor activities was added to the study in 2004. Competitive participation was added to provide an additional dimension to how Americans are participating in outdoor activities. Competitive participation levels among participants, as well as demographics, are summarized in this report.

# METHODOLOGY OF THE PARTICIPATION STUDY

## Telemark Skiing

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

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

The revised Telemark skiing definition may have also impacted the participation levels reported for cross-country/Nordic skiing in year 2003. Free-heel skiers who may have attributed their activity to cross-country/Nordic skiing in previous studies, may 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.

## Cross-Country/Nordic Skiing

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

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

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