

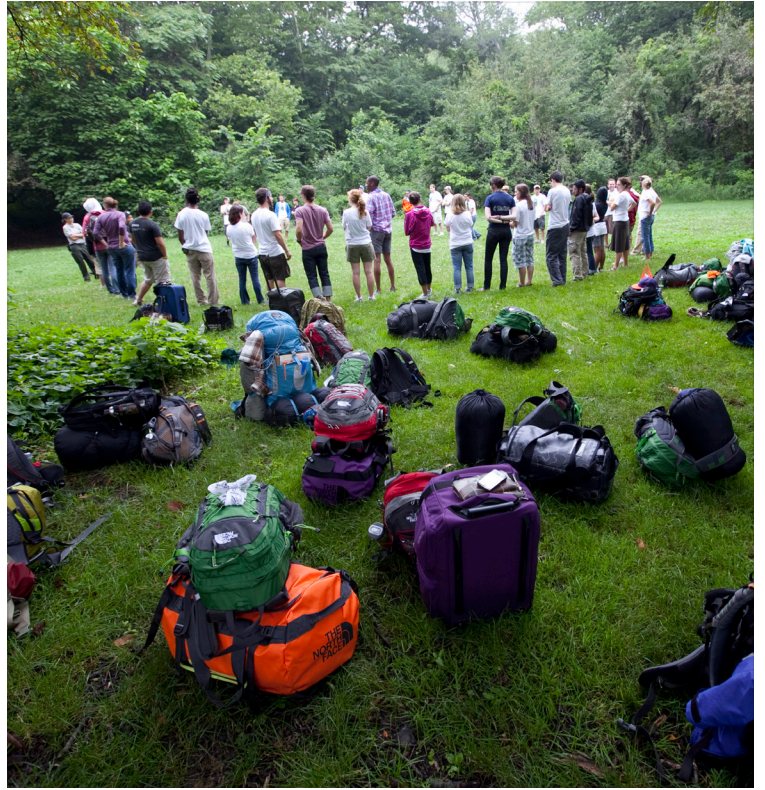
OUTDOOR RECREATION

PARTICIPATION REPORT

TOPLINE 2013



OUTDOOR
FOUNDATION®



2012 OUTDOOR PARTICIPATION

12.4 Billion Outdoor Outings

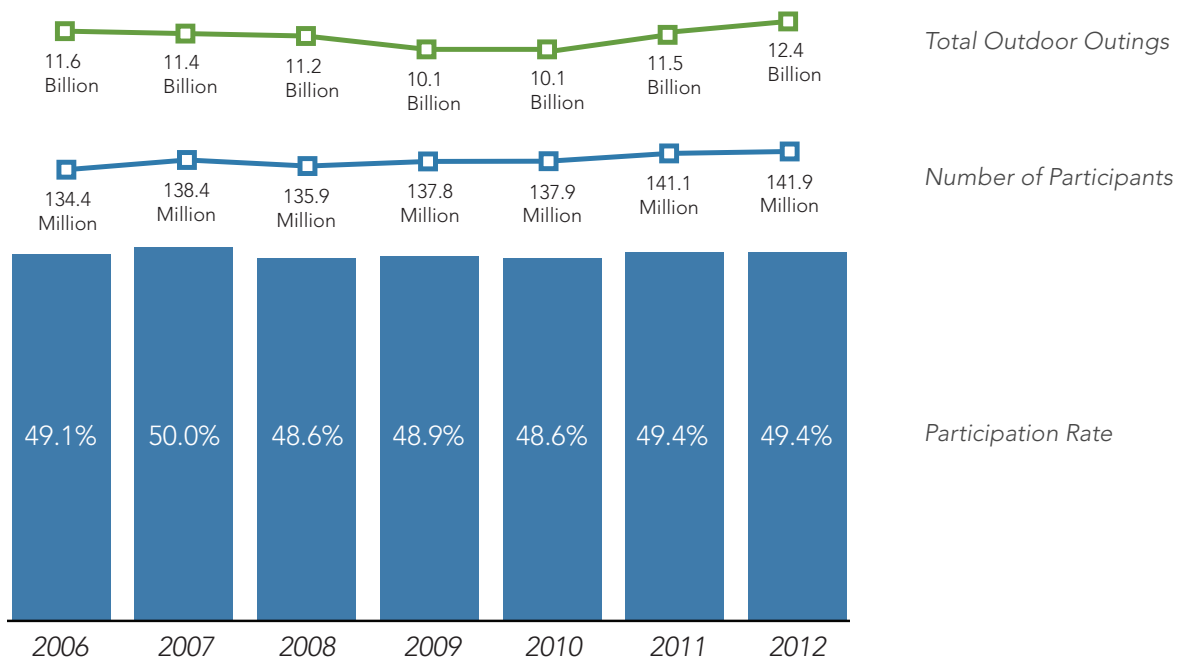
87.4 Average Outings Per Participant

More Americans participated in outdoor recreation in 2012 than in any year since The Outdoor Foundation began measuring participation in 2006. 141.9 million participants got outdoors last year, up from 141.1 million participants in 2011. In addition, outdoor participants were more active in 2012 than in past years, taking an average of 87.4 outdoor outings per participant for a total 12.4 billion outings overall.

Participation rates by age remained relatively stable year-over-year in 2012 — a testament to the resilience of outdoor participation in uncertain economic times and a changing climate. Youth and young adults, however, will need to remain an area of focus. Although participation rates were stable for younger participants from 2011 to 2012, the rates are still significantly lower than they were in 2006. Young participants are also still less diverse than the nation as a whole. In 2012, 71 percent of youth and young adult participants were non-Hispanic Caucasian, while 63 percent of all Americans were non-Hispanic Caucasian.

Looking forward, a growth strategy focused on today's youth and future generations of outdoor participants will be critical to reconnecting Americans with nature and healthier lifestyles.

OUTDOOR PARTICIPATION, 2006 TO 2012



YOUTH & YOUNG ADULT PARTICIPATION

Ages
6 to 24

4.8 Billion Outdoor Outings
98.3 Average Outings Per Participant

MOST POPULAR YOUTH AND YOUNG ADULT OUTDOOR ACTIVITIES

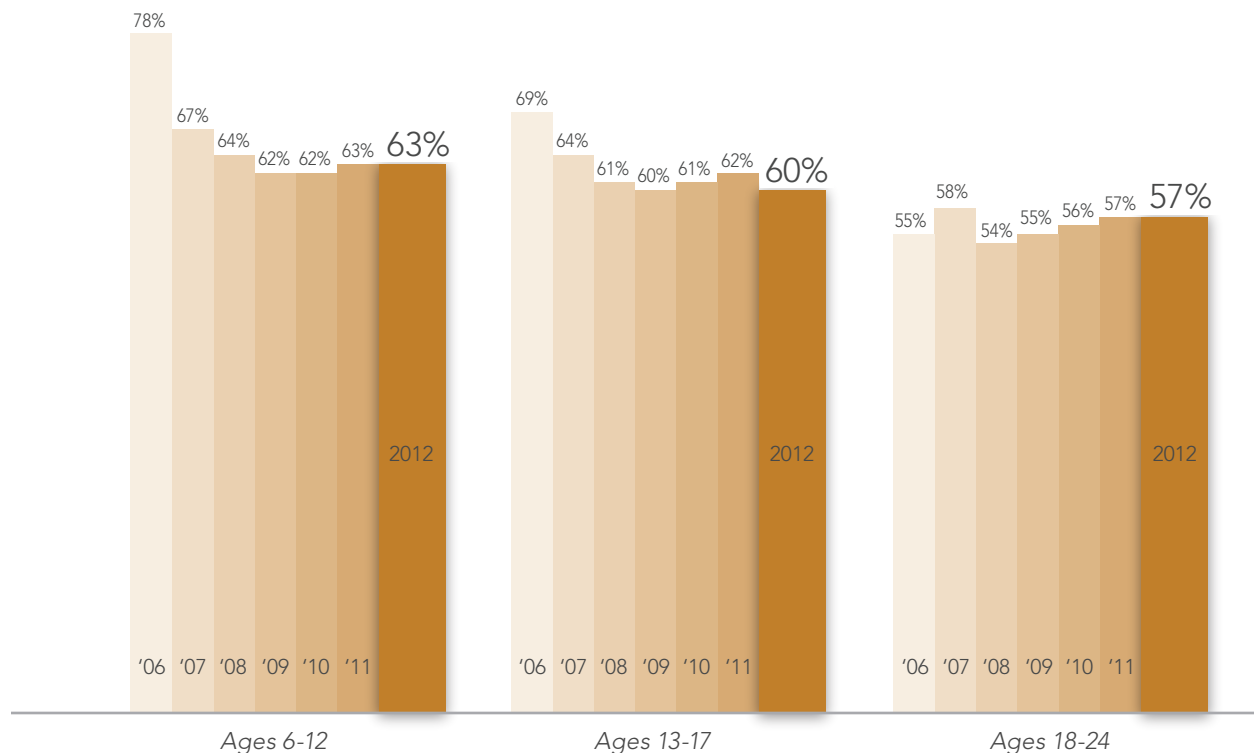
By Participation Rate, Ages 6 to 24

1. Running, Jogging and Trail Running
28.1% of youth, 22.7 million participants
2. Bicycling (Road, Mountain and BMX)
22.3% of youth, 18.0 million participants
3. Fishing (Fresh, Salt and Fly)
18.0% of youth, 14.6 million participants
4. Camping (Car, Backyard and RV)
17.5% of youth, 14.2 million participants
5. Hiking
12.7% of youth, 10.3 million participants

FAVORITE YOUTH AND YOUNG ADULT OUTDOOR ACTIVITIES

By Frequency of Participation, Ages 6 to 24

1. Running, Jogging and Trail Running
84.0 average outings per runner,
1.9 billion total outings
2. Bicycling (Road, Mountain and BMX)
67.6 average outings per cyclist,
1.2 billion total outings
3. Skateboarding
58.8 average outings per skateboarder,
291.8 million total outings
4. Birdwatching
25.4 average outings per birdwatcher,
69.7 million total outings
5. Surfing
25.3 average outings per surfer,
30.4 million total outings



YOUTH & YOUNG ADULT PARTICIPANT BREAKDOWN

		2007	2008	2009	2010	2011	2012
Gender	Male	52%	50%	57%	53%	53%	52%
	Female	48%	50%	43%	47%	47%	48%

		2007	2008	2009	2010	2011	2012
Age	6 to 12	33%	29%	37%	36%	36%	38%
	13 to 17	24%	25%	30%	30%	30%	26%
	18 to 24	44%	46%	34%	34%	34%	36%

		2007	2008	2009	2010	2011	2012
Race/ Ethnicity	African American/Black	8%	8%	8%	11%	7%	11%
	Asian/Pacific Islander	4%	6%	5%	6%	6%	7%
	Caucasian/White, non-Hispanic	77%	75%	78%	71%	76%	71%
	Hispanic	7%	7%	7%	9%	8%	8%
	Other	4%	4%	3%	4%	4%	4%

		2007	2008	2009	2010	2011	2012
Census Region	New England	5%	5%	5%	5%	4%	5%
	Middle Atlantic	15%	14%	12%	13%	13%	13%
	East North Central	17%	17%	17%	17%	17%	16%
	West North Central	7%	7%	8%	7%	7%	8%
	South Atlantic	18%	19%	18%	17%	18%	18%
	East South Central	5%	6%	7%	6%	6%	6%
	West South Central	9%	9%	10%	10%	11%	10%
	Mountain	8%	8%	8%	9%	9%	8%
	Pacific	16%	15%	15%	16%	16%	16%

ADULT PARTICIPATION

Ages
25+

7.6 Billion Outdoor Outings
81.8 Average Outings Per Participant

MOST POPULAR ADULT OUTDOOR ACTIVITIES

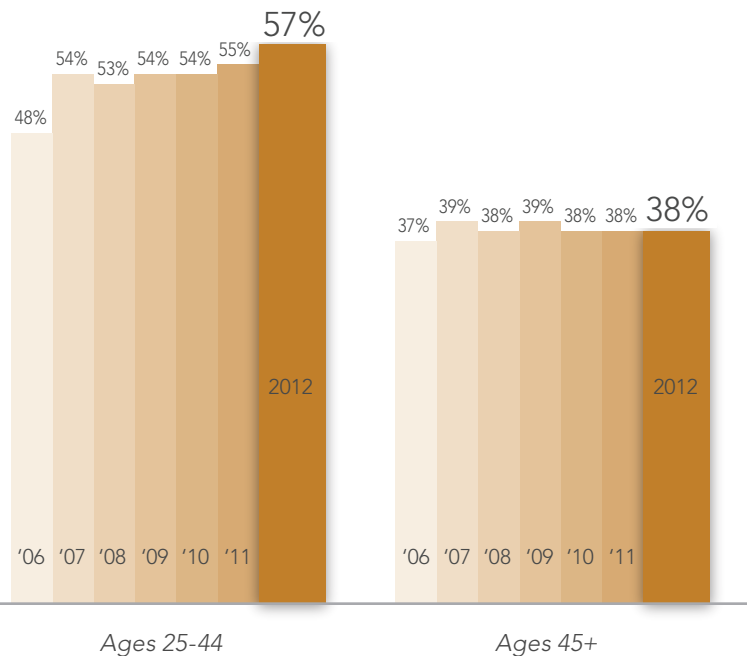
By Participation Rate, Ages 25+

1. Fishing (Fresh, Salt and Fly)
15.7% of adults, 32.5 million participants
2. Running, Jogging and Trail Running
14.9% of adults, 30.8 million participants
3. Bicycling (Road, Mountain and BMX)
12.0% of adults, 24.8 million participants
4. Hiking
11.7% of adults, 24.2 million participants
5. Camping (Car, Backyard and RV)
11.5% of adults, 23.8 million participants

FAVORITE ADULT OUTDOOR ACTIVITIES

By Frequency of Participation, Ages 25+

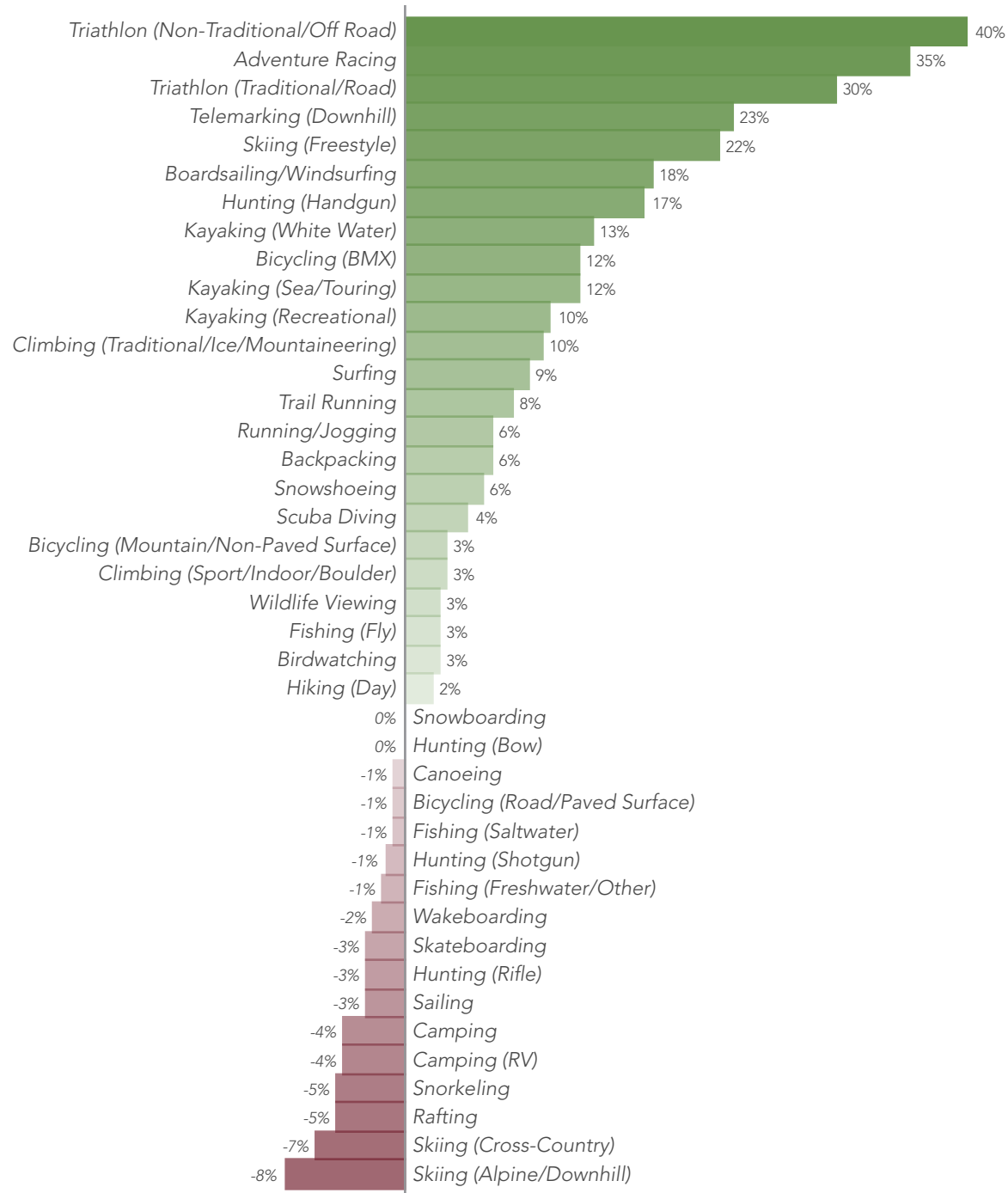
1. Running, Jogging and Trail Running
87.2 average outings per runner,
2.7 billion total outings
2. Bicycling (Road, Mountain and BMX)
58.4 average outings per cyclist,
1.5 billion total outings
3. Birdwatching
40.7 average outings per birdwatcher,
467.9 million total outings
4. Backpacking
33.4 average outings per backpacker,
184.3 million total outings
5. Wildlife Viewing
29.9 average outings per viewer,
540.9 million total outings



2012 OUTDOOR TRENDS

Averaging the year-to-year changes in participation for outdoor activities provides a stabilized indicator of how sports are trending over time. Over the past 3 years, multisport activities have experienced the largest average annual increases, and activities such as downhill skiing, cross-country skiing, camping, RV camping, and rafting have experienced the largest average annual decreases.

AVERAGE YEAR-TO-YEAR CHANGE IN PARTICIPATION, 2009 TO 2012



OUTDOOR PARTICIPATION BY ACTIVITY

Ages
6+

	2006 in 000's	2007 in 000's	2008 in 000's	2009 in 000's	2010 in 000's	2011 in 000's	2012 in 000's	3 Year Average Change
Adventure Racing	725	698	920	1,089	1,339	1,065	2,170	35.4%
Backpacking	7,067	6,637	7,867	7,647	8,349	7,095	8,771	5.9%
Bicycling (BMX)	1,655	1,887	1,904	1,811	2,369	1,547	2,175	12.2%
Bicycling (Mountain/ Non-Paved Surface)	6,751	6,892	7,592	7,142	7,161	6,816	7,714	2.9%
Bicycling (Road/ Paved Surface)	38,457	38,940	38,114	40,140	39,320	40,349	39,232	-0.7%
Birdwatching More Than 1/4 Mile From Home/Vehicle	11,070	13,476	14,399	13,294	13,339	12,794	14,275	2.6%
Boardsailing/ Windsurfing	938	1,118	1,307	1,128	1,617	1,151	1,593	17.6%
Camping (RV)	16,946	16,168	16,517	17,436	15,865	16,698	15,108	-4.4%
Camping (Within 1/4 Mile of Vehicle/ Home)	35,618	31,375	33,686	34,338	30,996	32,925	29,982	-4.1%
Canoeing	9,154	9,797	9,935	10,058	10,553	9,787	9,839	-0.6%
Climbing (Sport/ Indoor/Boulder)	4,728	4,514	4,769	4,313	4,770	4,119	4,592	2.8%
Climbing (Traditional/ Ice/Mountaineering)	1,586	2,062	2,288	1,835	2,198	1,609	2,189	9.7%
Fishing (Fly)	6,071	5,756	5,941	5,568	5,478	5,683	6,012	2.6%
Fishing (Freshwater/ Other)	43,100	43,859	40,331	40,961	38,860	38,868	39,135	-1.5%
Fishing (Saltwater)	12,466	14,437	13,804	12,303	11,809	11,983	12,017	-0.8%
Hiking (Day)	29,863	29,965	32,511	32,572	32,496	34,492	34,545	2.0%
Hunting (Bow)	3,875	3,818	3,722	4,226	3,908	4,633	4,075	-0.3%
Hunting (Handgun)	2,525	2,595	2,873	2,276	2,709	2,671	3,553	16.9%
Hunting (Rifle)	11,242	10,635	10,344	11,114	10,150	10,807	10,164	-2.7%
Hunting (Shotgun)	8,987	8,545	8,731	8,490	8,062	8,678	8,174	-1.1%
Kayak Fishing	n/a	n/a	n/a	n/a	1,044	1,201	1,409	n/a
Kayaking (Recreational)	4,134	5,070	6,240	6,212	6,465	8,229	8,144	10.1%
Kayaking (Sea/ Touring)	1,136	1,485	1,780	1,771	2,144	2,029	2,446	12.1%
Kayaking (White Water)	828	1,207	1,242	1,369	1,842	1,546	1,878	13.3%
Rafting	3,609	4,340	4,651	4,318	4,460	3,821	3,690	-4.8%
Running/Jogging	38,559	41,064	41,130	43,892	49,408	50,713	52,187	6.0%
Sailing	3,390	3,786	4,226	4,342	3,869	3,725	3,958	-2.8%
Scuba Diving	2,965	2,965	3,216	2,723	3,153	2,579	2,982	4.4%
Skateboarding	10,130	8,429	7,807	7,352	6,808	5,827	6,627	-2.7%
Skiing (Alpine/ Downhill)	n/a	10,362	10,346	10,919	11,504	10,201	8,243	-8.4%
Skiing (Cross- Country)	n/a	3,530	3,848	4,157	4,530	3,641	3,307	-6.6%

<i>Skiing (Freestyle)</i>	n/a	2,817	2,711	2,950	3,647	4,318	5,357	22.0%
<i>Snorkeling</i>	8,395	9,294	10,296	9,358	9,305	9,318	8,011	-4.8%
<i>Snowboarding</i>	n/a	6,841	7,159	7,421	8,196	7,579	7,351	0.0%
<i>Snowshoeing</i>	n/a	2,400	2,922	3,431	3,823	4,111	4,029	5.7%
<i>Stand Up Paddling</i>	n/a	n/a	n/a	n/a	1,050	1,242	1,542	n/a
<i>Surfing</i>	2,170	2,206	2,607	2,403	2,767	2,195	2,895	8.8%
<i>Telemarking (Downhill)</i>	n/a	1,173	1,435	1,482	1,821	2,099	2,766	23.3%
<i>Trail Running</i>	4,558	4,216	4,857	4,833	5,136	5,610	6,003	7.5%
<i>Triathlon (Non-Traditional/Off Road)</i>	281	483	602	666	929	709	1,442	39.7%
<i>Triathlon (Traditional/Road)</i>	640	798	1,087	1,208	1,978	1,393	2,184	30.3%
<i>Wakeboarding</i>	3,046	3,521	3,544	3,577	3,645	3,389	3,348	-2.1%
<i>Wildlife Viewing More Than 1/4 Mile From Home/Vehicle</i>	20,294	22,974	24,113	21,291	21,025	21,964	22,999	2.6%

ABOUT THE REPORT

METHODOLOGY

During January and February of 2013 a total of 42,363 online interviews were carried out with a nationwide sample of individuals and households from the US Online Panel of over 1 million people operated by Synovate/IPSOS. A total of 15,770 individual and 26,593 household surveys were completed. The total panel is maintained to be representative of the US population for people ages 6 and older. Over sampling of ethnic groups took place to boost response from typically under responding groups.

The 2012 participation survey sample size of 42,363 completed interviews provides a high degree of statistical accuracy. All surveys are subject to some level of standard error — that is, the degree to which the results might differ from those obtained by a complete census of every person in the US. A sport with a participation rate of five percent has a confidence interval of plus or minus 0.21 percentage points at the 95 percent confidence level. This translates to plus or minus four percent of participants.

A weighting technique was used to balance the data to reflect the total US population ages six and above. The following variables were used: gender, age, income, household size, region, and population density. The total population figure used was 287,138,000 people ages six and older.

For greater accuracy, snow sports participation is measured annually for each winter season. In the preceding pages, 2007 participation represents participation in the 2006/2007 winter season, 2008 participation represents participation in the 2007/2008 winter season, 2009 participation represents participation in the 2008/2009 winter season, 2010 participation represents participation in the 2009/2010 winter season, 2011 participation represents participation in the 2010/2011 winter season and 2012 participation represents participation in the 2011/2012 winter season. Due to a change in the seasonal questions in the survey this year, the best comparison with the seasonal data published last year was to apply the calendar year rate of change to the previously published seasonal numbers.

ABOUT THE OUTDOOR FOUNDATION

The Outdoor Foundation is a not-for-profit 501(c)(3) established by Outdoor Industry Association to inspire and grow future generations of outdoor enthusiasts. Its vision is to be a driving force behind a massive increase in active outdoor recreation in America. For more information visit www.outdoorfoundation.org.

ABOUT THE PHYSICAL ACTIVITY COUNCIL

The Physical Activity Council (PAC) is the partnership of six major trade associations in US sports, fitness and leisure industries. These six organizations work together to provide the most comprehensive and reliable database of sports participation. To learn more about the PAC and its affiliates, please visit www.physicalactivitycouncil.com.

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The Outdoor Foundation

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