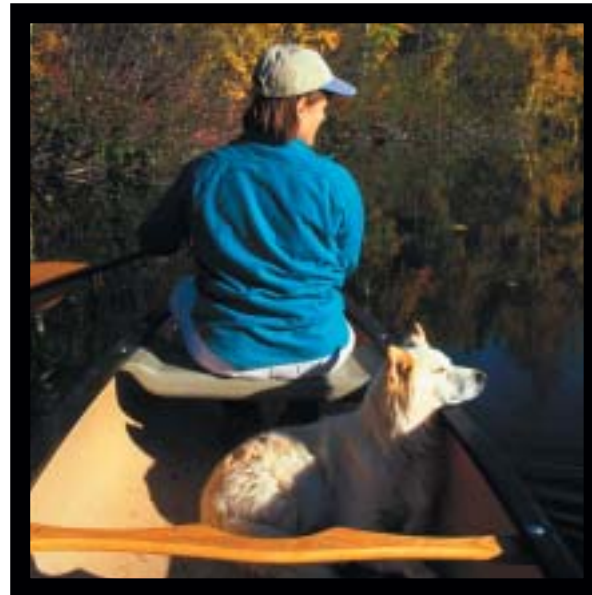


# EXPLORING THE ACTIVE LIFESTYLE

An Outdoor Industry Foundation Consumer Outreach Report  
January 2004 EXECUTIVE SUMMARY



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Prepared for Outdoor Industry Foundation by:



This Report Was Made Possible By



**OutdoorRetailer**

And Member Companies of Outdoor Industry Association

|                                     |           |
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# Background and Objectives

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

## Specifically, this research will

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

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

To qualify, respondents had to meet the following criteria:

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

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

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

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



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

## Weighting:

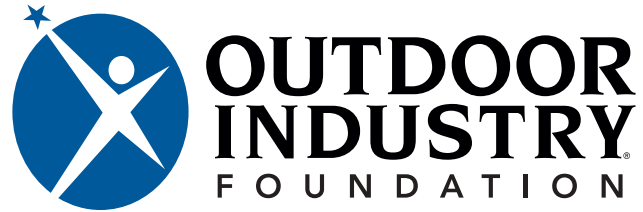
Upon completion of data collection, we balanced survey responders (qualified and non-qualified) to be representative of the U.S. on key demographics: gender, age, income, education, race/ethnicity and geographic location. This allows the final qualified sample to be the result of the screening criteria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

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

### The following symbols are used throughout the report:

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

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



## Summary of Key Findings



# Summary of Key Findings

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

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

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

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

3. **Even though participation in outdoor activities is a way of life, there appears to be a lifecycle of participation in activities that illustrates a lull in participation on average in the participant's mid-twenties.**
  - Over half of participants have stopped their favorite activity for a period of time.
  - Level of participation significantly decreases in the 25-34 age group whether marriage and kids are involved or not.
  
4. **The longevity of outdoor participation is rooted not only in the functional health benefits but also in the emotional benefits of actual participation.**
  - Over three-fourths of participants agree that participating in outdoor activities gives them a feeling of accomplishment, an escape from life pressures, and a connection with themselves.
  - 63% like the physical challenge.
  - 79% are proactive about their health.

## Summary of Key Findings

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- 5. Discount stores offer participants a convenient place to shop for outdoor apparel and equipment at reasonable prices, however, this outlet is probably only used for the incidental items.**
- Over half of participants have purchased apparel and equipment at discount stores.
  - However, when it comes to high quality and reliable merchandise, participants are more likely to go to outdoor specialty shops or outdoor chain stores.
  - In addition, participants spend more at outdoor specialty shops than any other type of outlet—significantly more than at discount stores.
- 6. There are many barriers to participation in human powered outdoor activities. Whether it is starting participation, continuing participation or frequency of participation, the most prevalent barriers are time and money.**
- Top challenges for getting people to participate are being too busy (for adults) and the costs associated with gear and equipment.
  - 4 in 10 participants feel they have too many other commitments in life right now to consider outdoor activities.
  - Top reasons for permanently stopping an activity for people under the age of 44 relate to time commitments to school, children, household maintenance, etc.

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

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

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

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

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

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

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

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

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

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

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

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

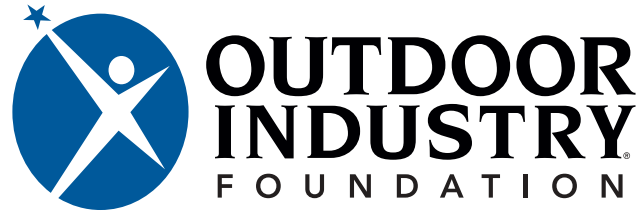
- Communicate the social aspect of the event as well as the connection with nature. Make the outings open to the entire family.
- Outdoor specialty stores can either sponsor their own events or can co-sponsor events with community organizations or schools. They can position themselves as *the expert*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

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

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

Encourage people of all ages to participate in outdoor activities.

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



## Overall Marketplace



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

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

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

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



# Respondent Demographic Profile

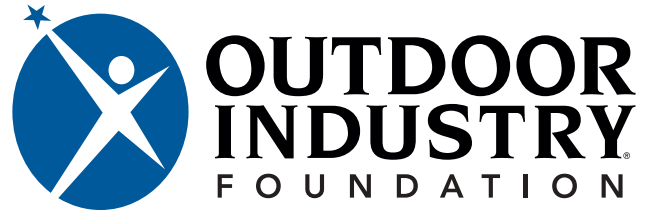
|  | Gen. Pop.  | Participants |
|--|------------|--------------|
|  | (7682 )    | ( 2054)      |
| <b>Age</b>                                   |            |              |
| 16-24  | 15%        | 24%          |
| 25-34  | 18%        | 19%          |
| 35-44  | 22%        | 19%          |
| 45+  |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



# Respondent Demographic Profile

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





# Attitudes



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

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

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

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

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

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

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

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

## Attitudes Summary

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

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

## Attitudes - Attitudinal Factors

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

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

**Outdoor Connection**

**Inexperience**

**Fairweather  
Participators**

**Less Active**

**Outdoor Extreme**



# Attitudes Toward Outdoor Activities Strongly Agree/Agree

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

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# Attitudes Toward Outdoor Activities Strongly Agree/Agree

## Participants

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

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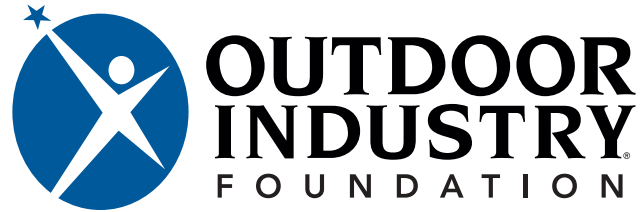
# Attitudes Toward Outdoor Activities

## Strongly Agree/Agree

### Participants

|  | Total<br>(2054)<br>% | Age<br>16-24<br>(498)<br>% | Age<br>25-34<br>(380)<br>% | Age<br>35-44<br>(397)<br>% | Age<br>45+<br>(779)<br>% |
|--|----------------------|----------------------------|----------------------------|----------------------------|--------------------------|
| <b>Fairweather Participators</b>                                     |                      |                            |                            |                            |                          |
| I only participate in outdoor activities when the weather cooperates | 59                   | 51                         | 70                         | 54                         | 61                       |
| I would much rather exercise indoors than outdoors                   | 28                   | 28                         | 36                         | 21                         | 27                       |
| I think most outdoor sports are too extreme                          | 14                   | 10                         | 14                         | 13                         | 17                       |
| <b>I hate to travel</b>  | 8                    | 6                          | 9                          | 7                          | 10                       |





## Past 2 Year Participation



# Past 2 Year Participation Summary

---

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

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

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

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

# Past 2 Year Participation Summary

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

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

# Participation Summary

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

# Past 2 Year Participation

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

## Past 2 Year Participation (continued)

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



# Number of Outdoor Activities Participate In

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



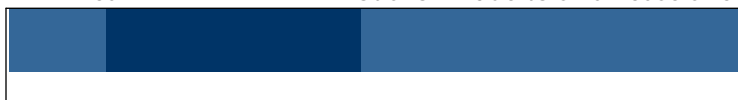


# Number of Times Participate in Outdoor Activities in Past 2 Years\*

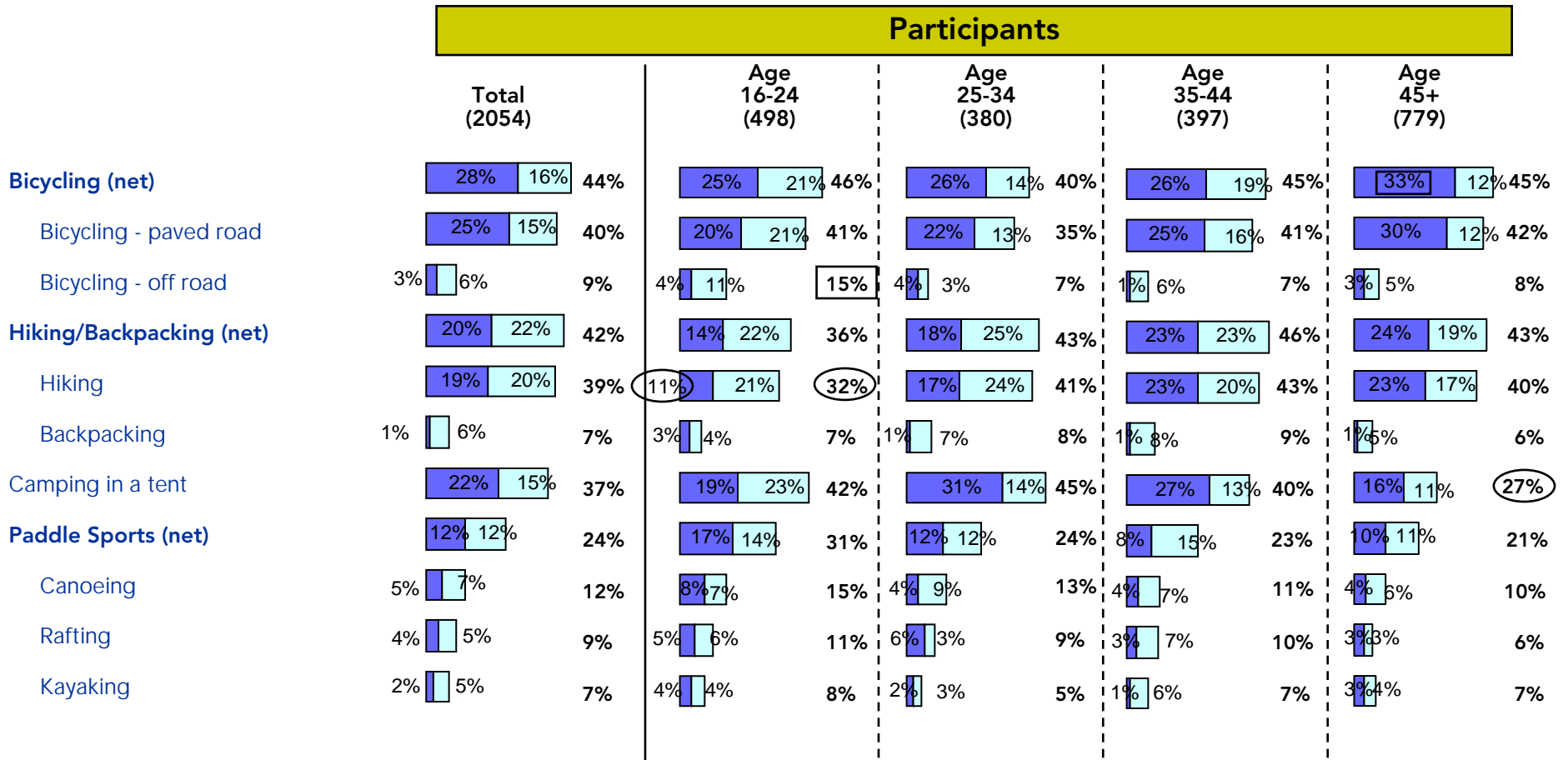
|   | Participants |             |             |             |             |
|---|--------------|-------------|-------------|-------------|-------------|
|   | Total        | Age 16-24   | Age 25-34   | Age 35-44   | Age 45+     |
| <b>Overall</b>                                    | <b>54.4</b>  | 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

\*Mean

\*\*Not shown due to small base size



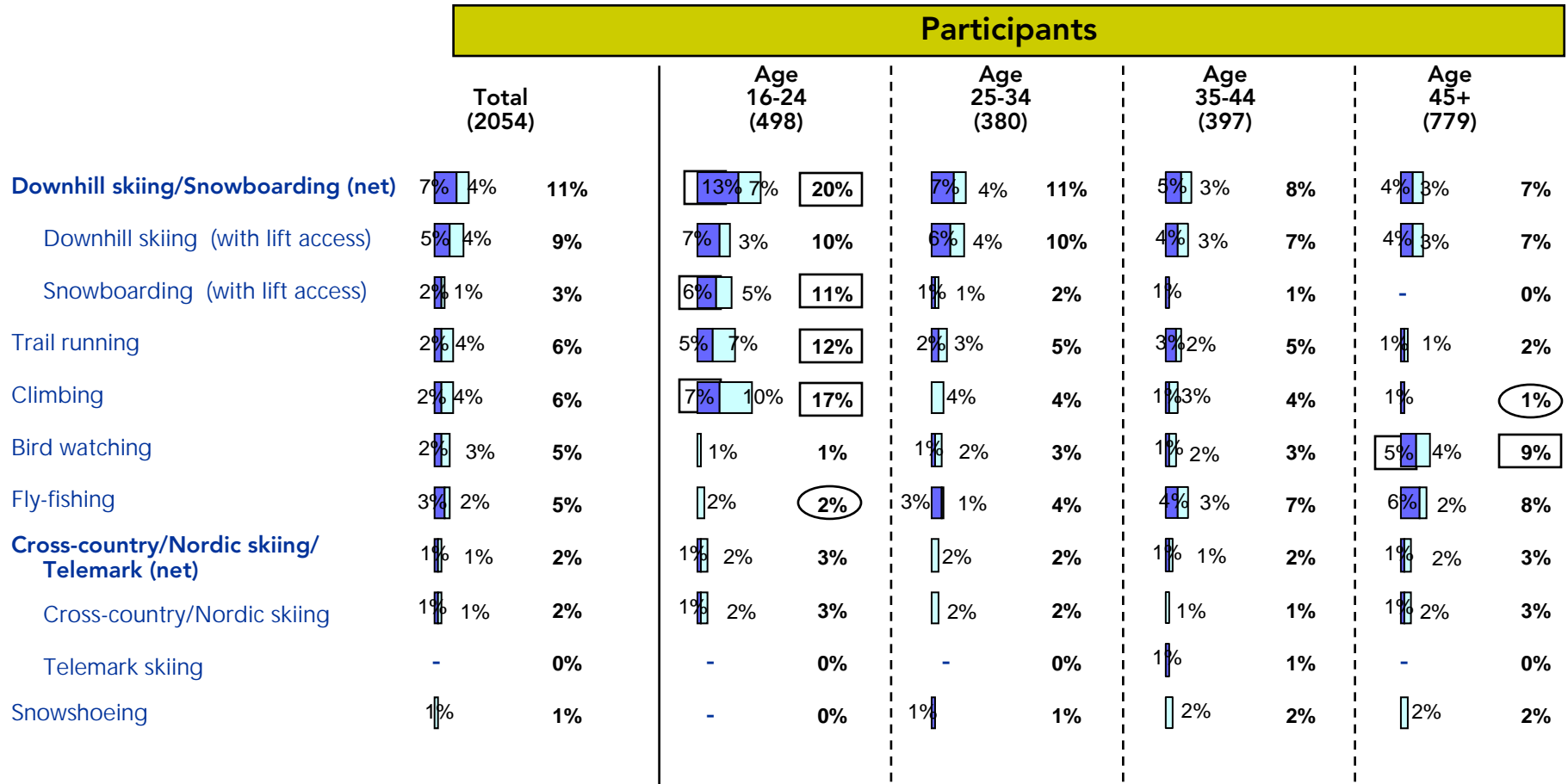
# Favorite Activities Among Participants





■ Top favorite activity  
 ■ 2<sup>nd</sup> & 3<sup>rd</sup> favorite activity

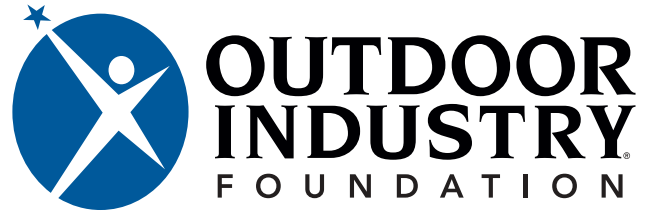


# Favorite Activities Among Participants



 Top favorite activity  
 2<sup>nd</sup> & 3<sup>rd</sup> favorite activity





# Retail



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

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

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

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

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

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

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

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

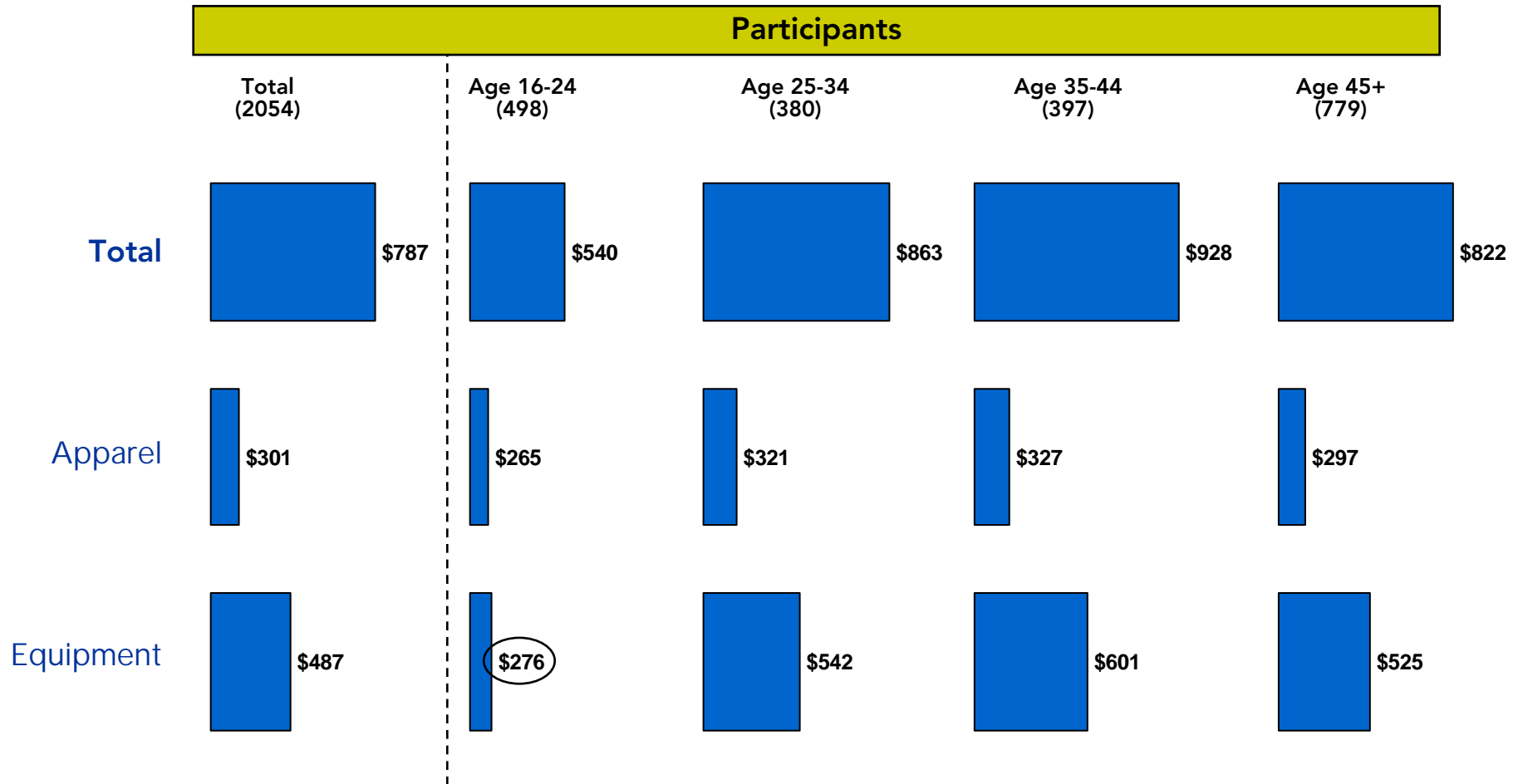
- Outdoor chain stores excel on many important reasons to purchase, especially:
  - Has gear/equipment want/need
  - Good quality merchandise/reliable dependable products
  - Has clothing want/need
  - Good selection/variety
  - Knowledgeable/experienced sales people
- Outdoor specialty stores also excel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

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

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

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

# Retail - Amount Spent\*



\*Past 2 years





# Retail

## Type of Store Where Participants Shop

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





# Retail - Type of Store Where Participants Shop Most Often

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





# Retail

## Most Important Reasons for Purchases

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





# Retail - Most Important Reasons for Purchasing Apparel

## Participants

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



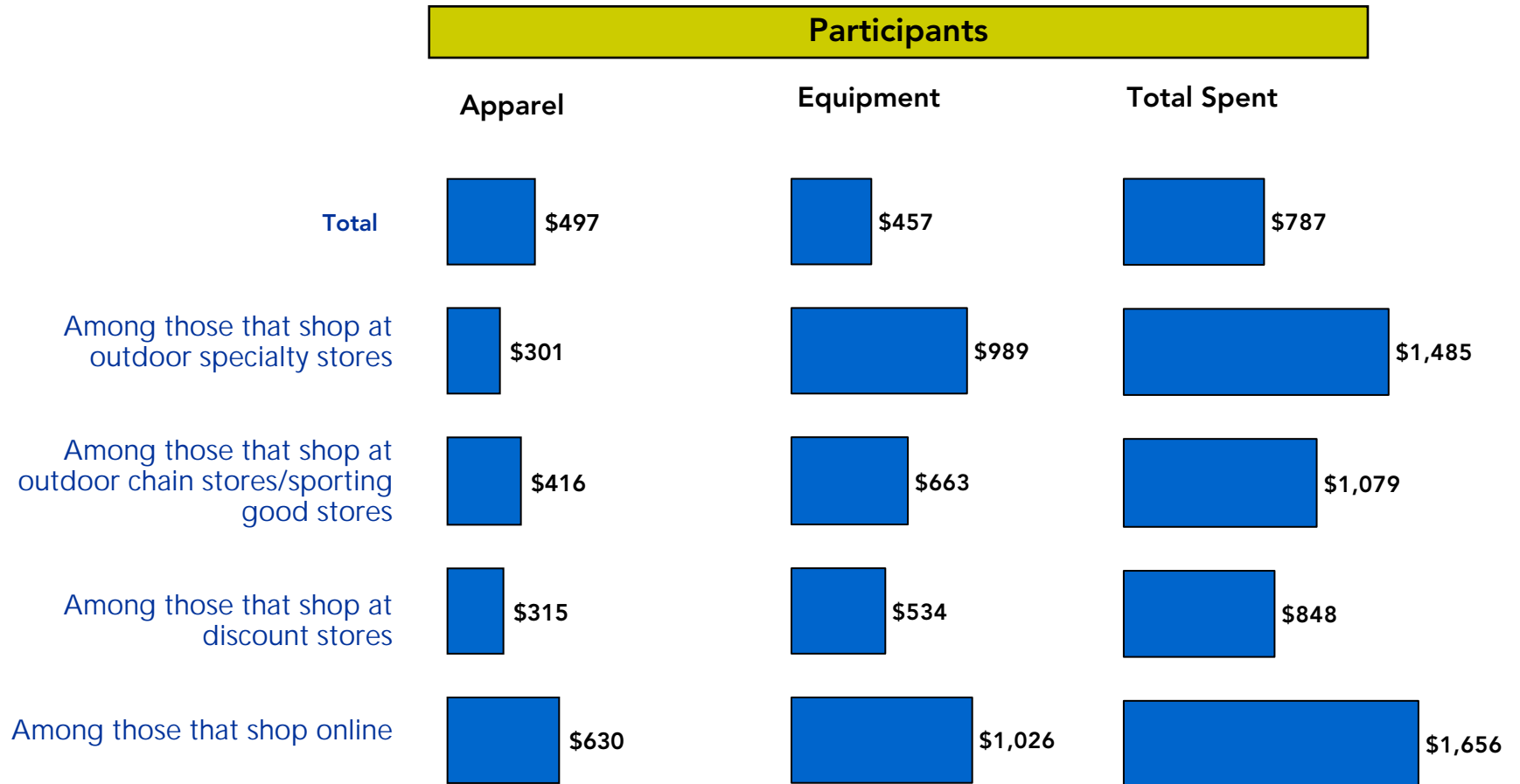
# Retail - Most Important Reasons for Purchasing Equipment

## Participants

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

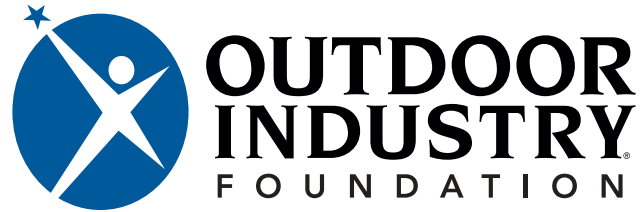
\*Department Stores not shown due to small base size.

# Retail - Amount Spent\*



\*Past 2 years





# Barriers to Participation in Outdoor Activities



# Barriers to Participation Summary

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## As age increases, the likelihood of lapsing increases.

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

## Reasons for lapsing vary by age.

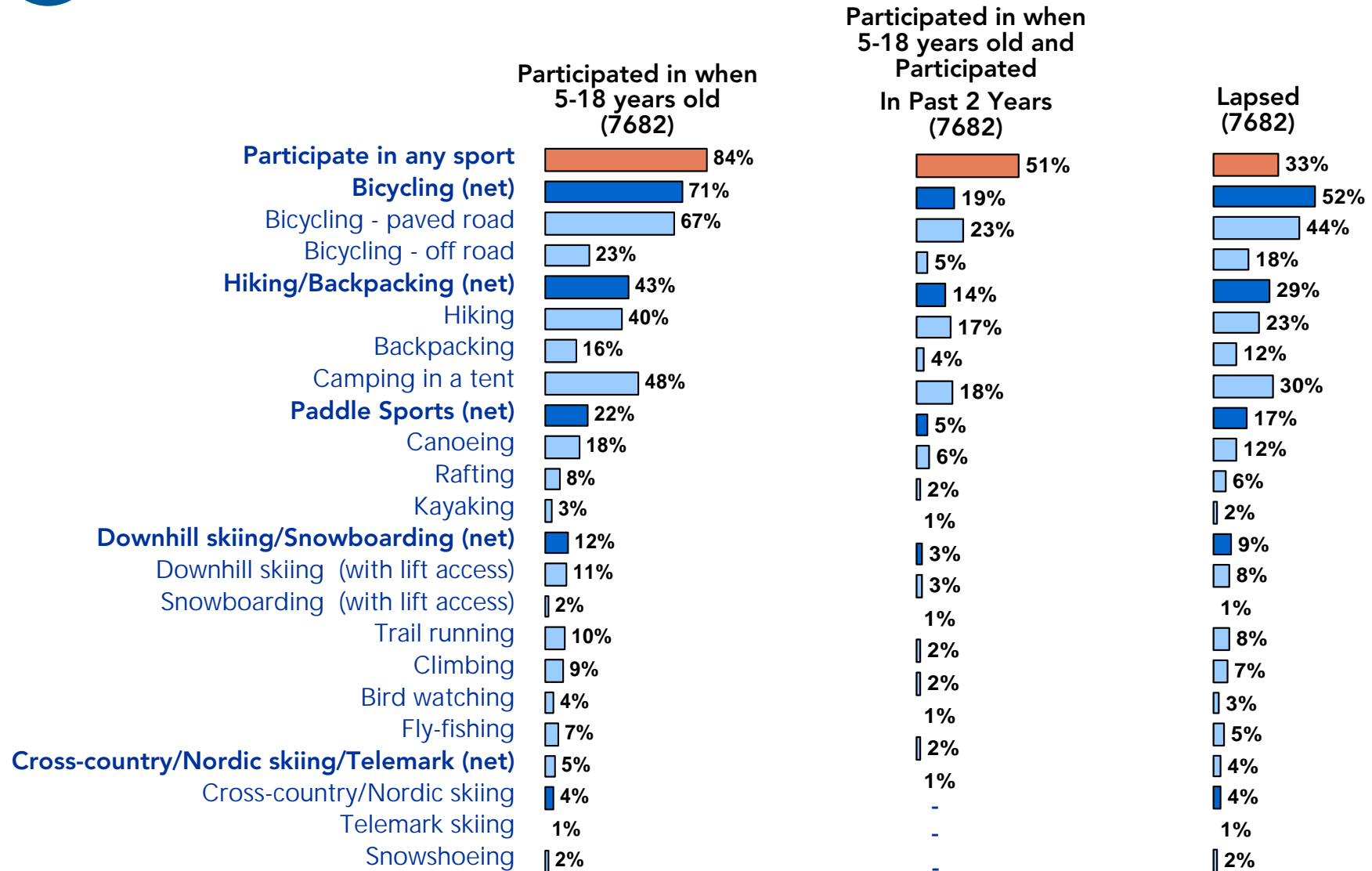
- Time commitments related to school, children, and household maintenance are the major reasons non-participants under age 44 have lapsed from their outdoor activities.
- The 45+ age group are more likely to cite physical health reasons, injury and “just don’t enjoy the activity any more”.

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

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

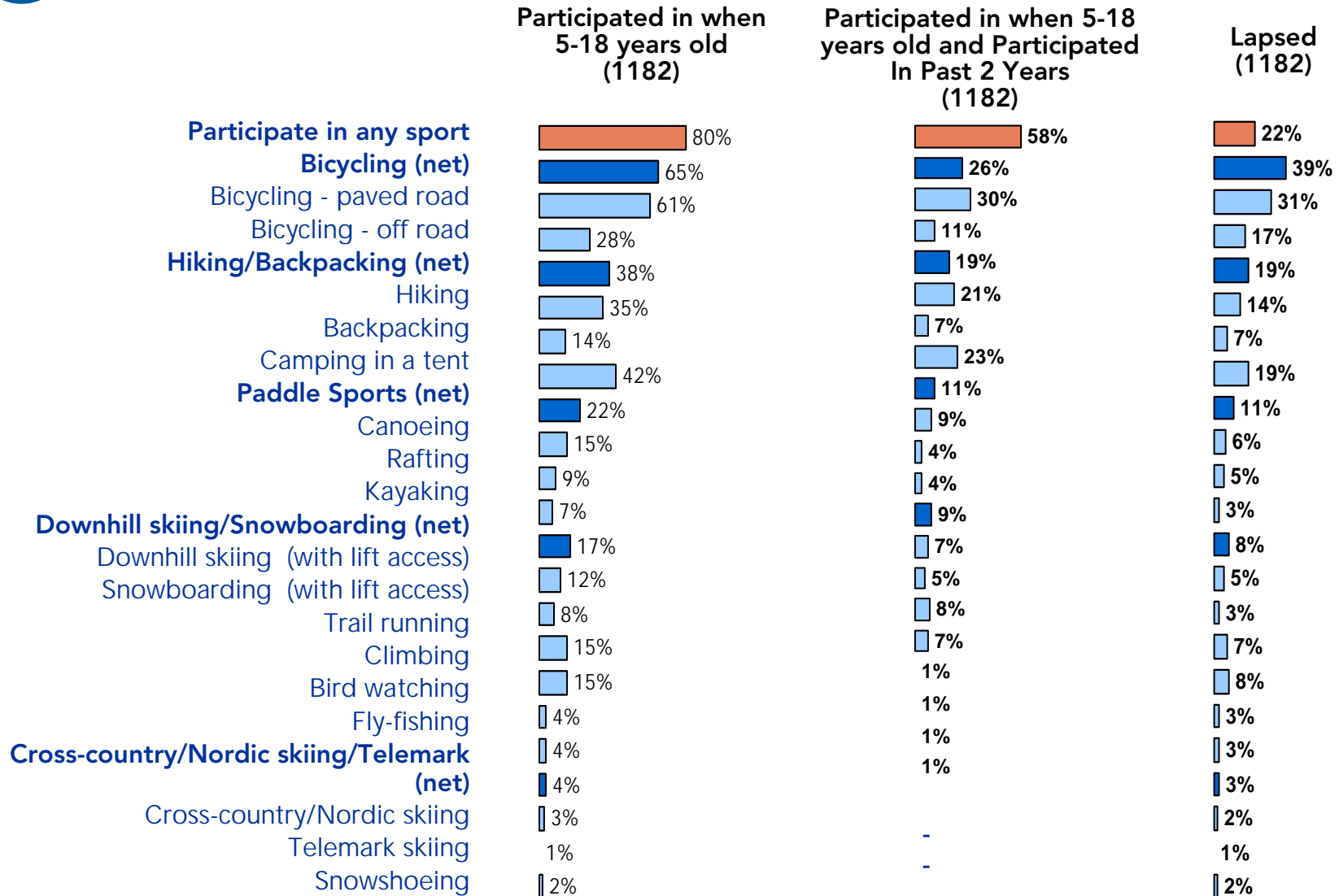


# Lapsed Activities Among General Population



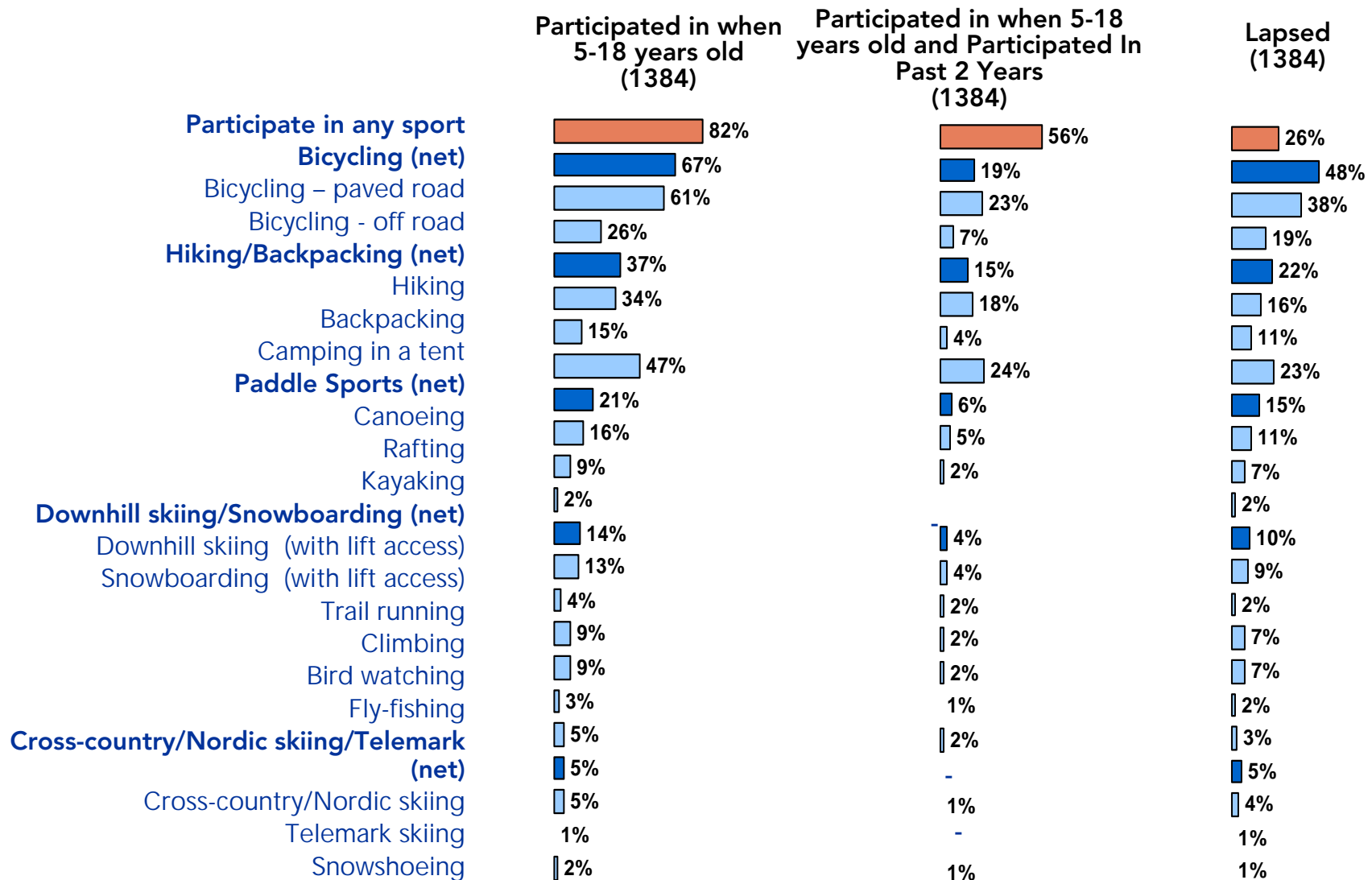


# Lapsed Activities - Among General Population, Age 16-24 Years Old



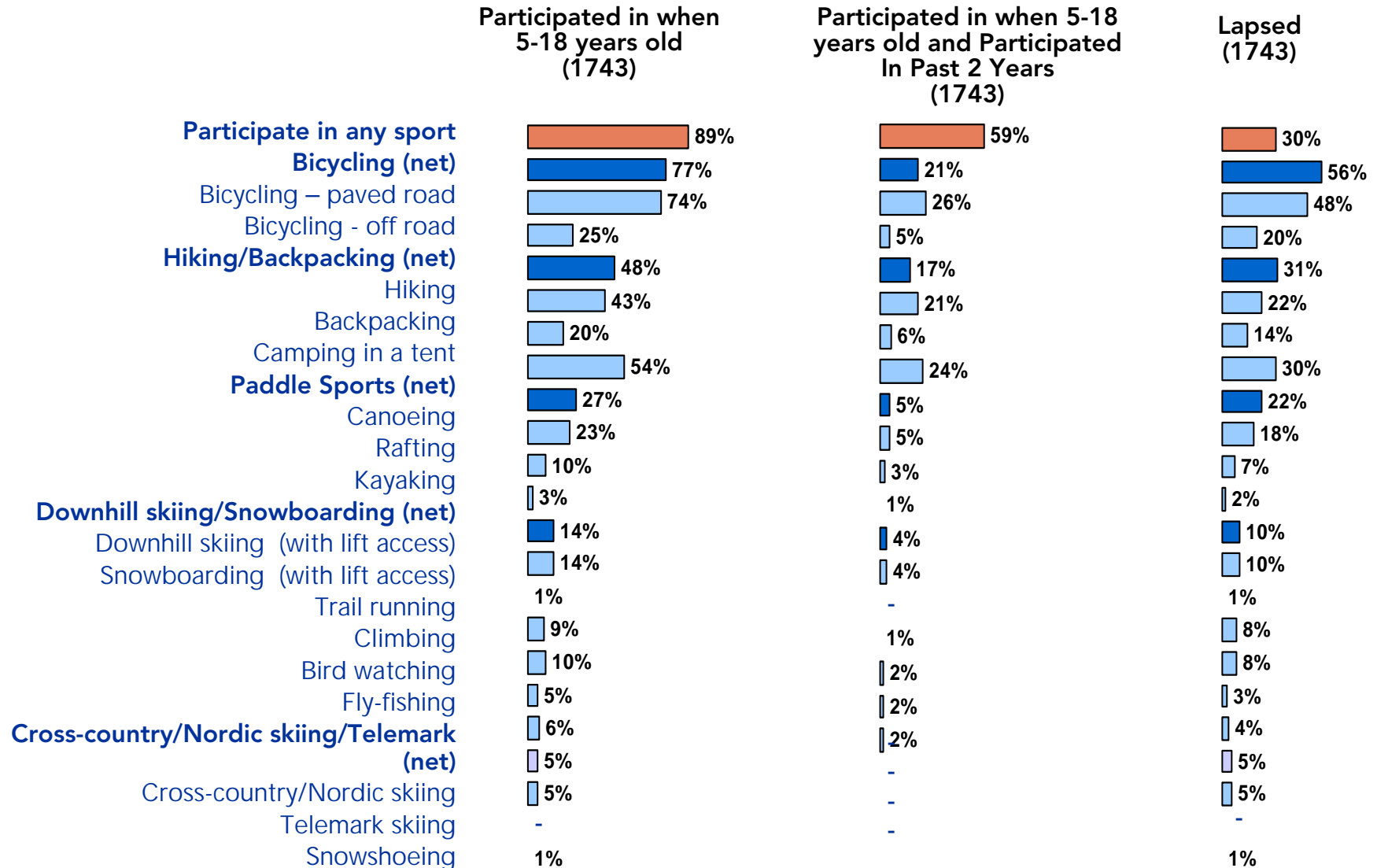


# Lapsed Activities - Among General Population, Age 25-34 Years Old



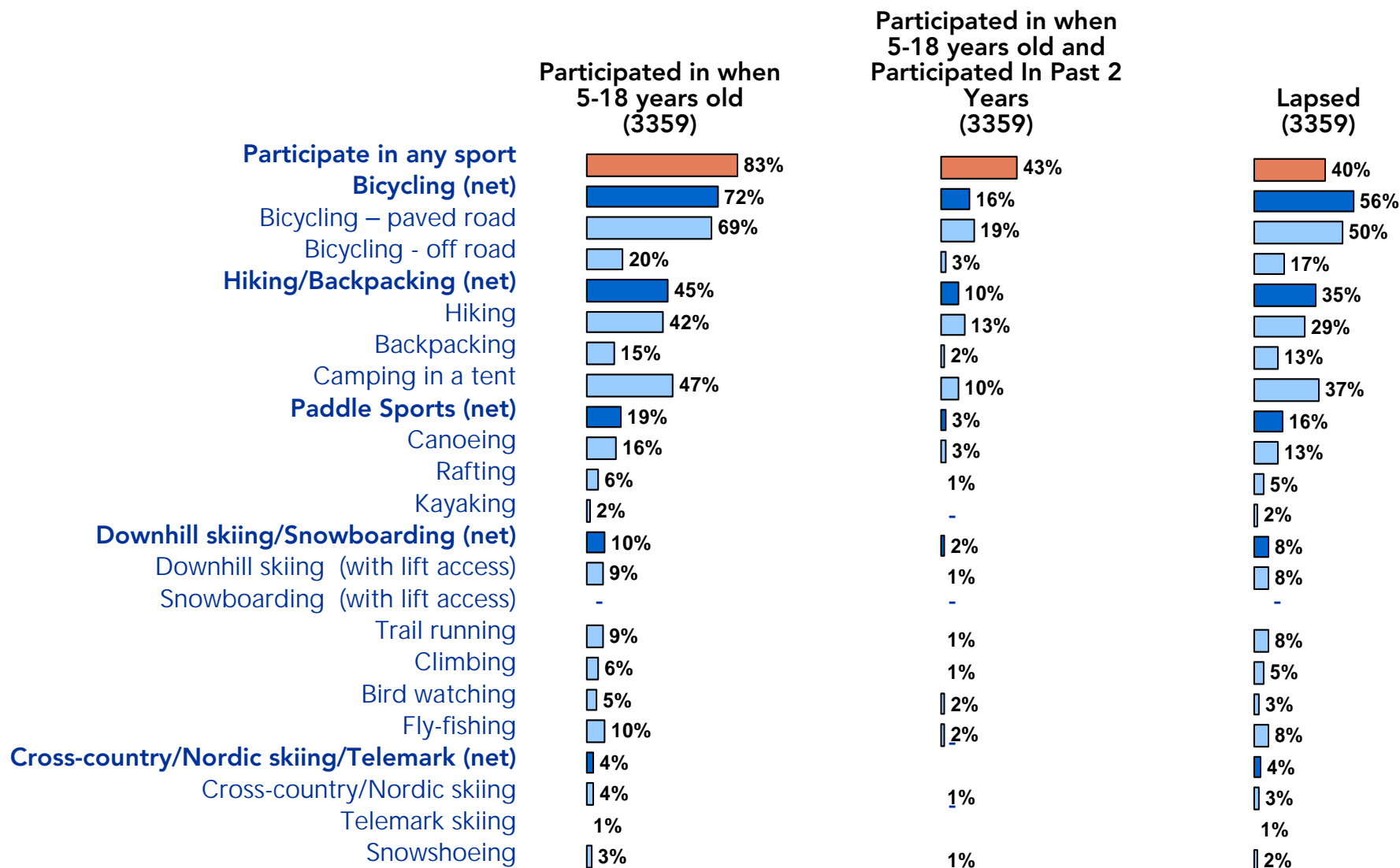


# Lapsed Activities - Among General Population, Age 35-44 Years Old





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





# Reasons For Stopping Activity\*

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

\*Among those who lapsed for any activity

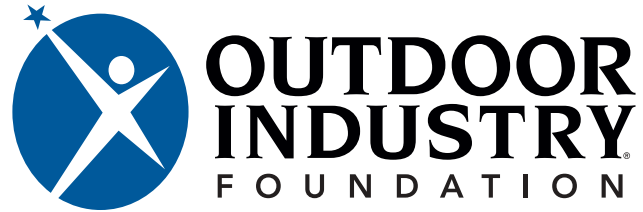




# Top Challenges Getting People To Participate in Outdoor Activities

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





# Opportunities Moving Forward

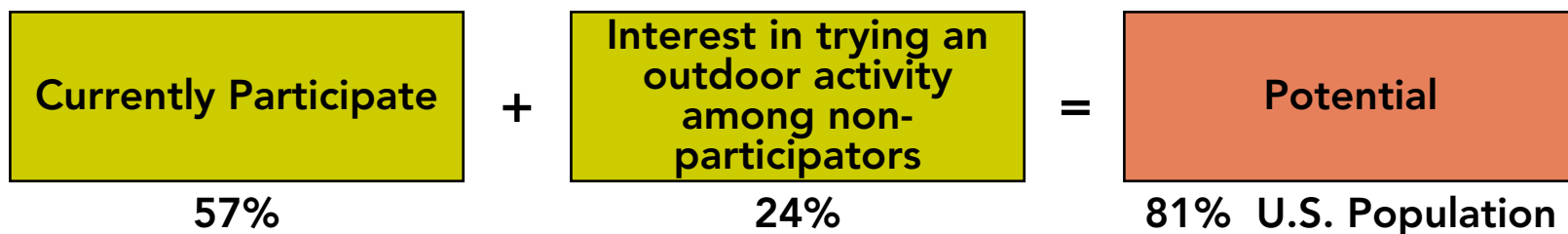


# Participation Interest Summary

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

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

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

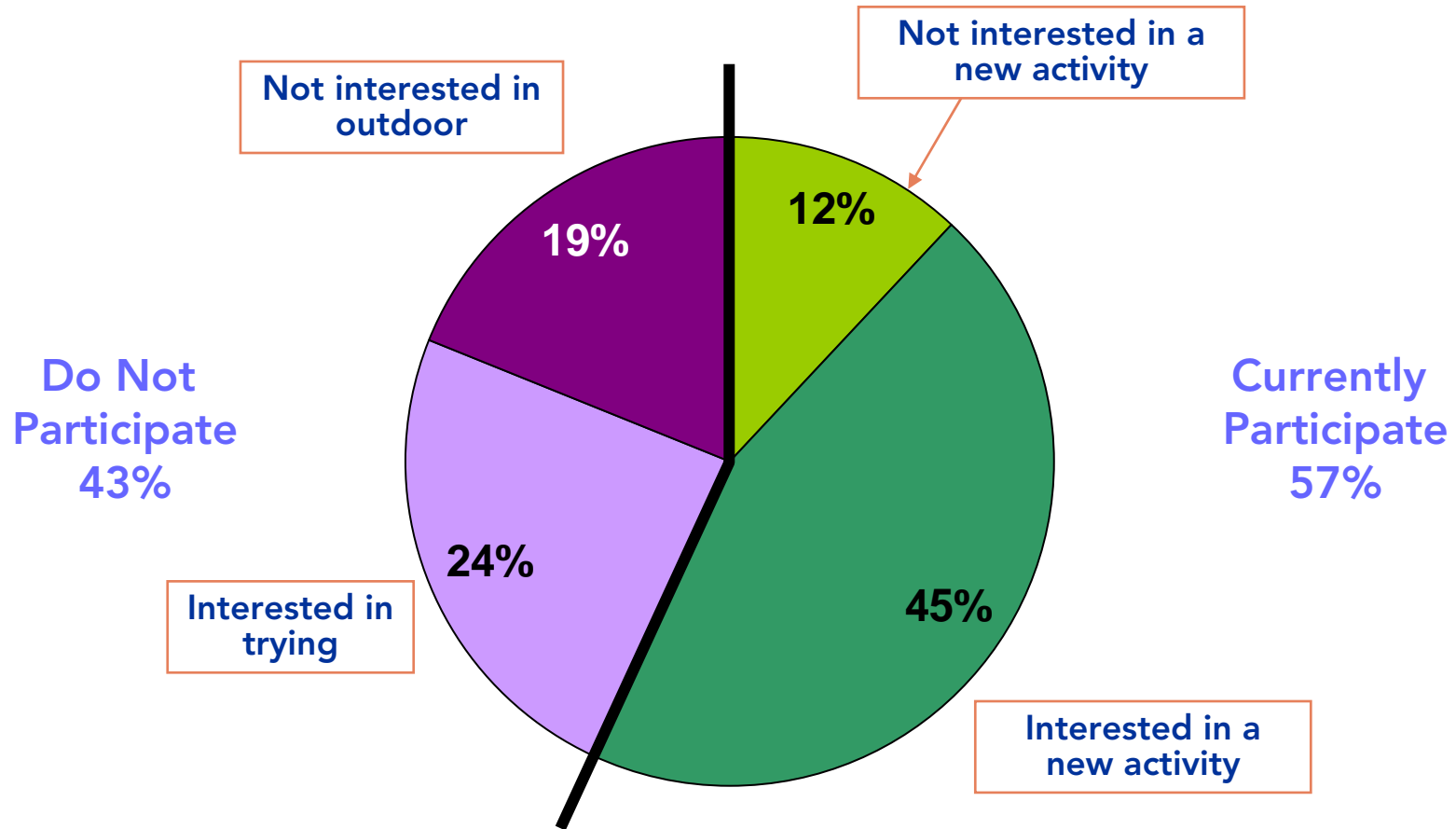


- The activities that stand to gain the most in participation are the same activities that are most popular – biking, hiking, and camping.

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

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

# Participation\*



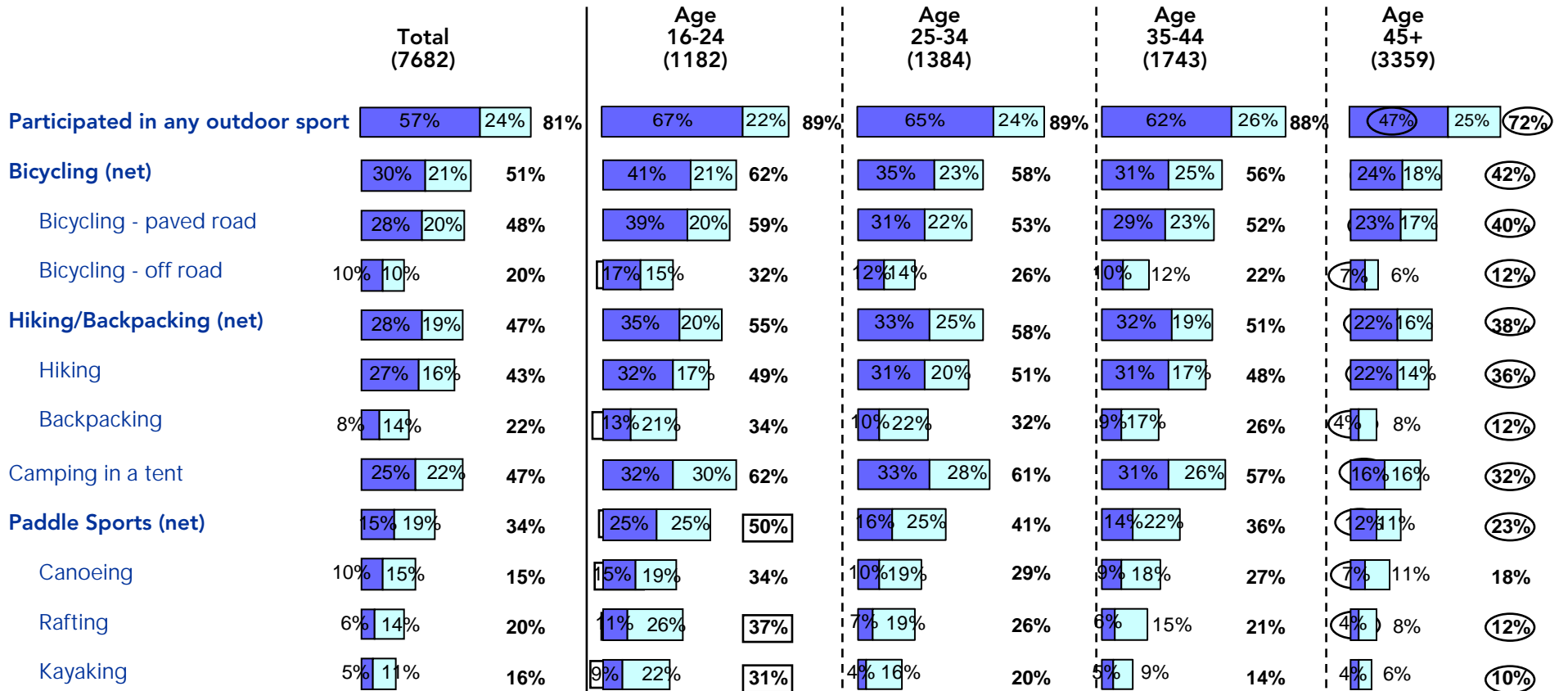
**Human Powered Outdoor Activities Potential: 81%**

\*Base: General Population



# Total Participation

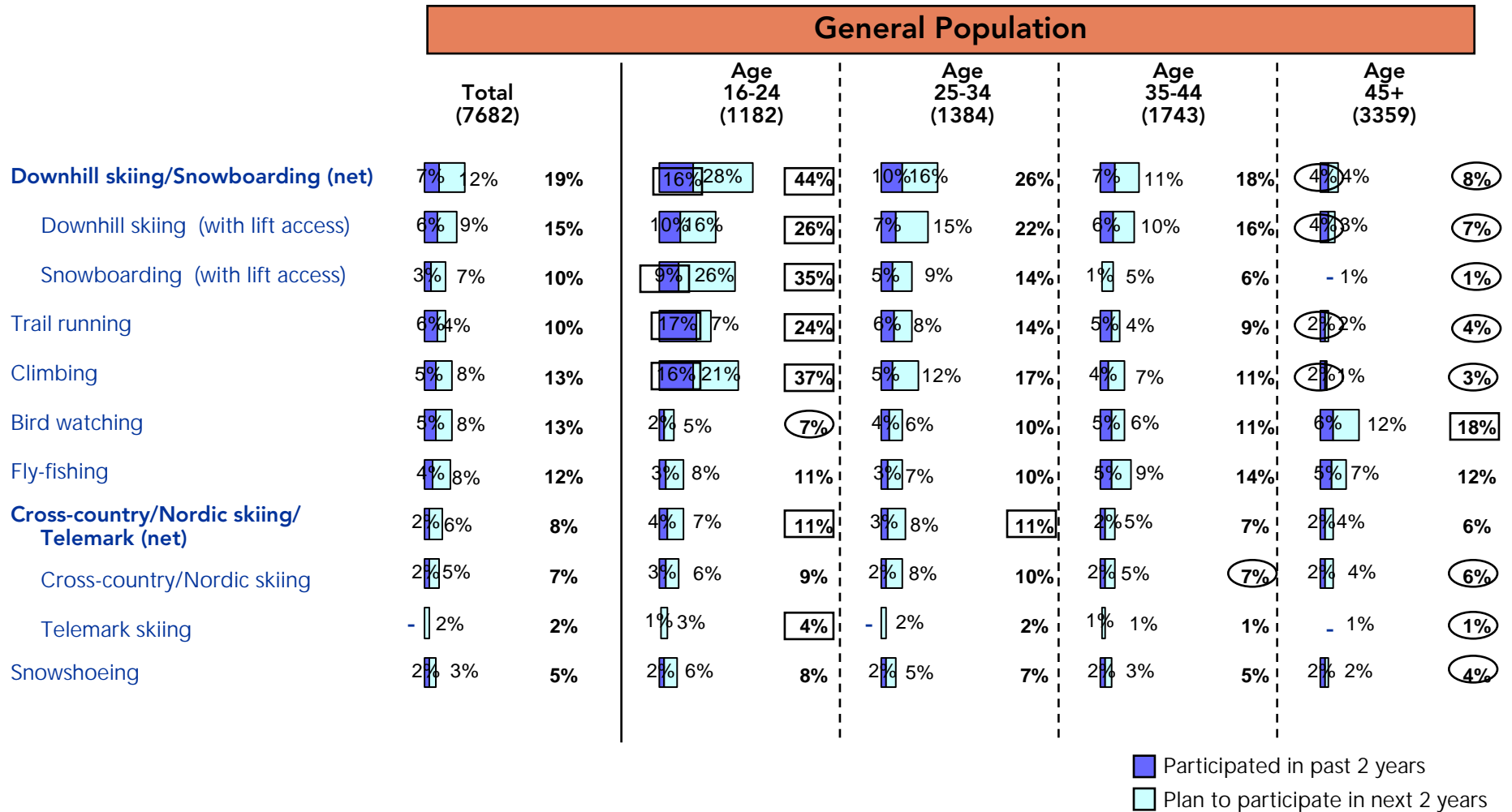
## General Population



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



# Total Participation (Continued)



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

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

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

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

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

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

### Among Youth

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

### Among Adults

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

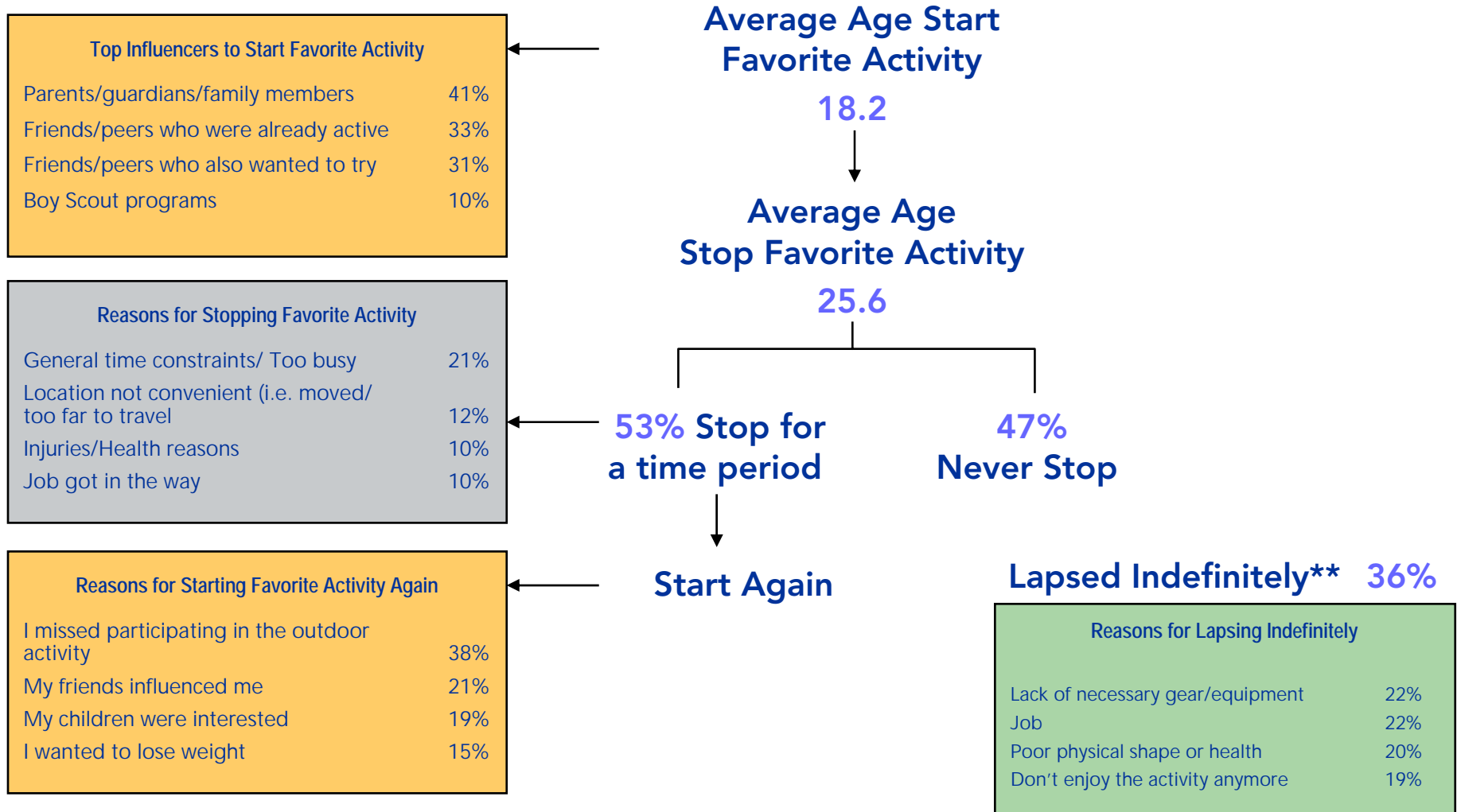
**The key attitudes that correlated with increase in frequency revolve around:**

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

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

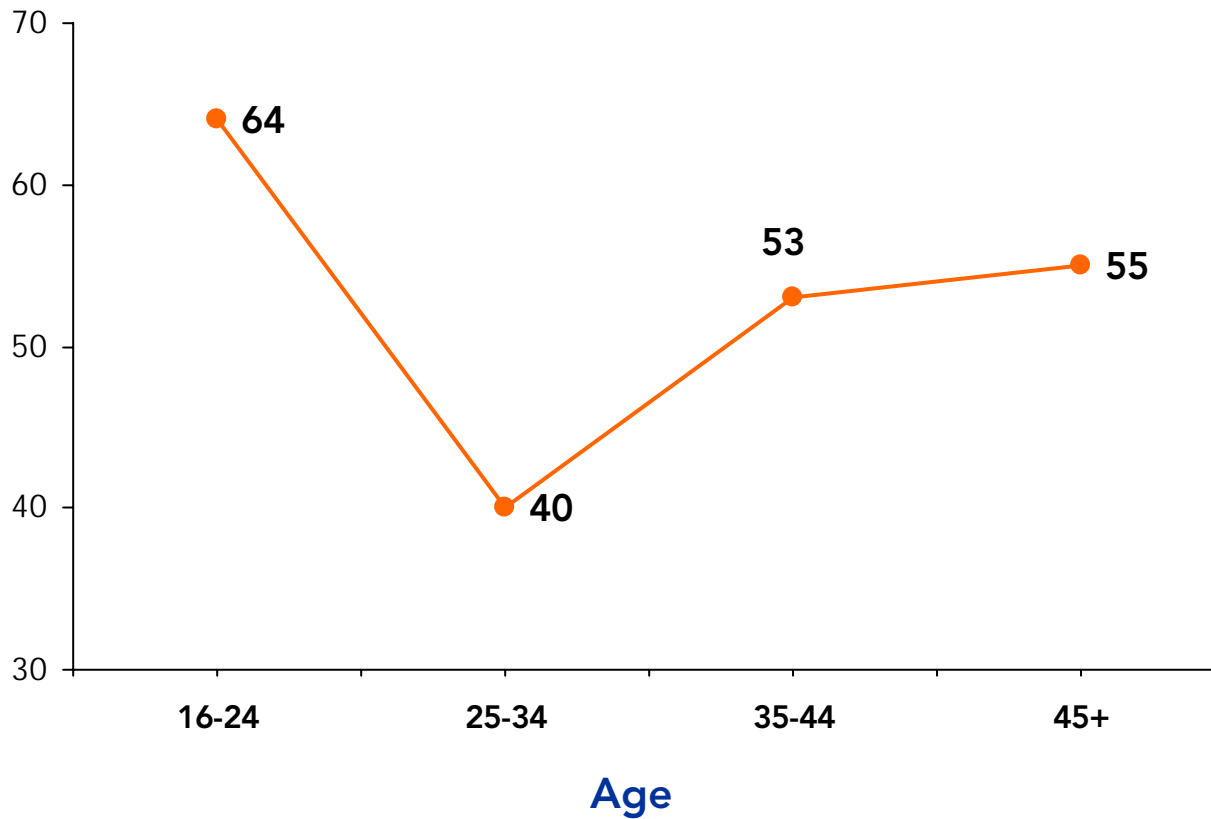
- Participation in extreme activities
- Outdoor enjoyment
- Ingrained behavior
- Exercise

# Lifecycle

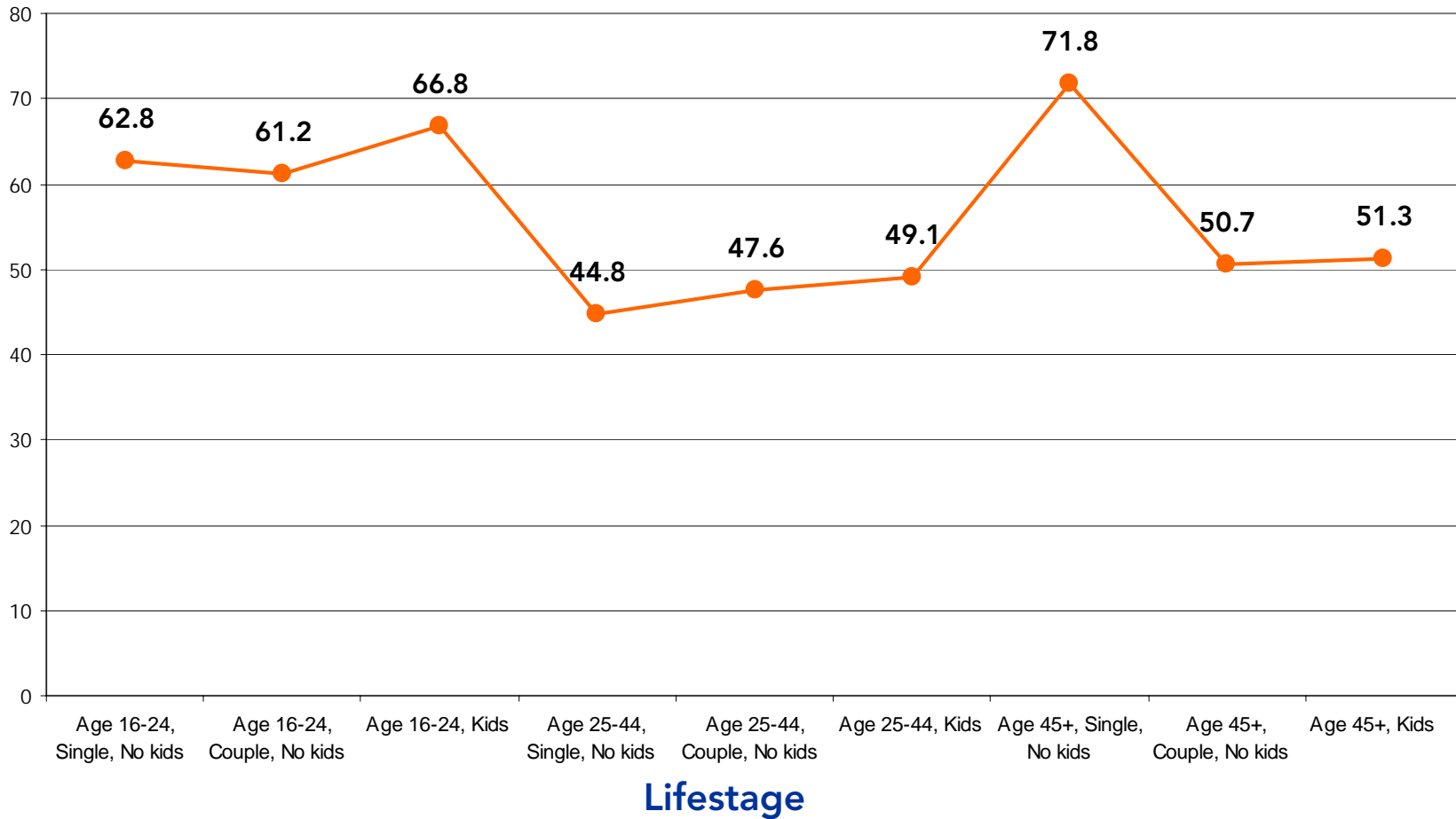


\*\* Based on ever participating in a sport

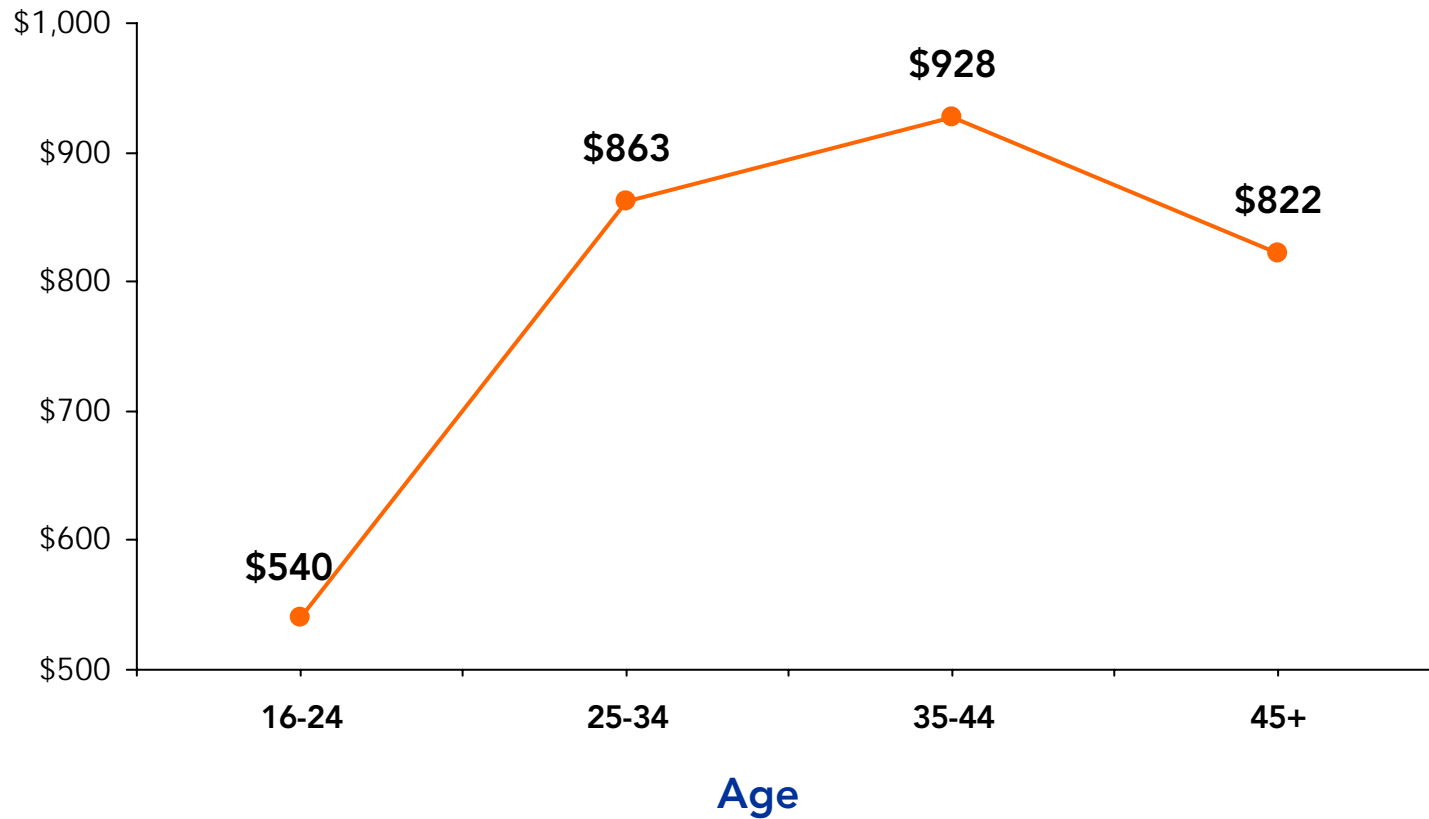
## Average Number of Times Participated in Any Outdoor Activity in Past 2 Years



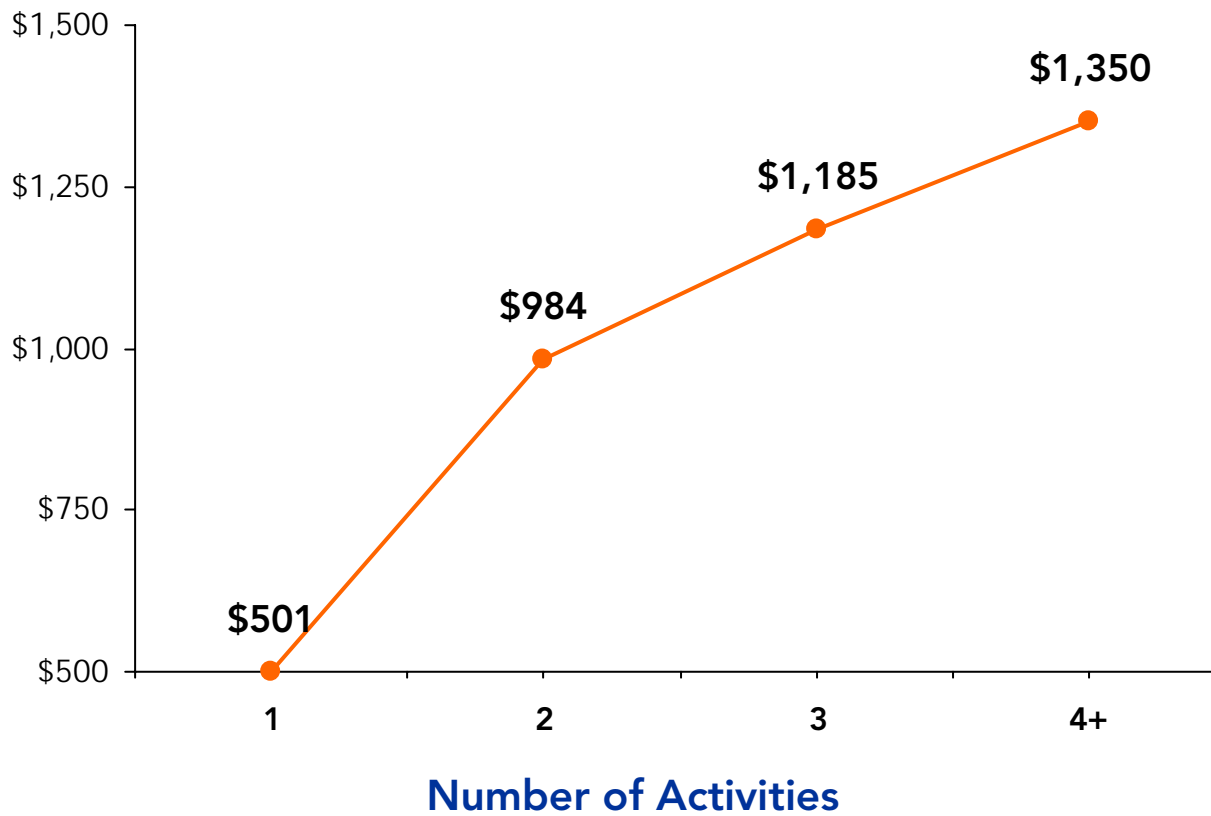
**Average Number of Times Participated  
in Any Outdoor Activity in Past 2 Years**



## Average Amount Spend on Outdoor Activities

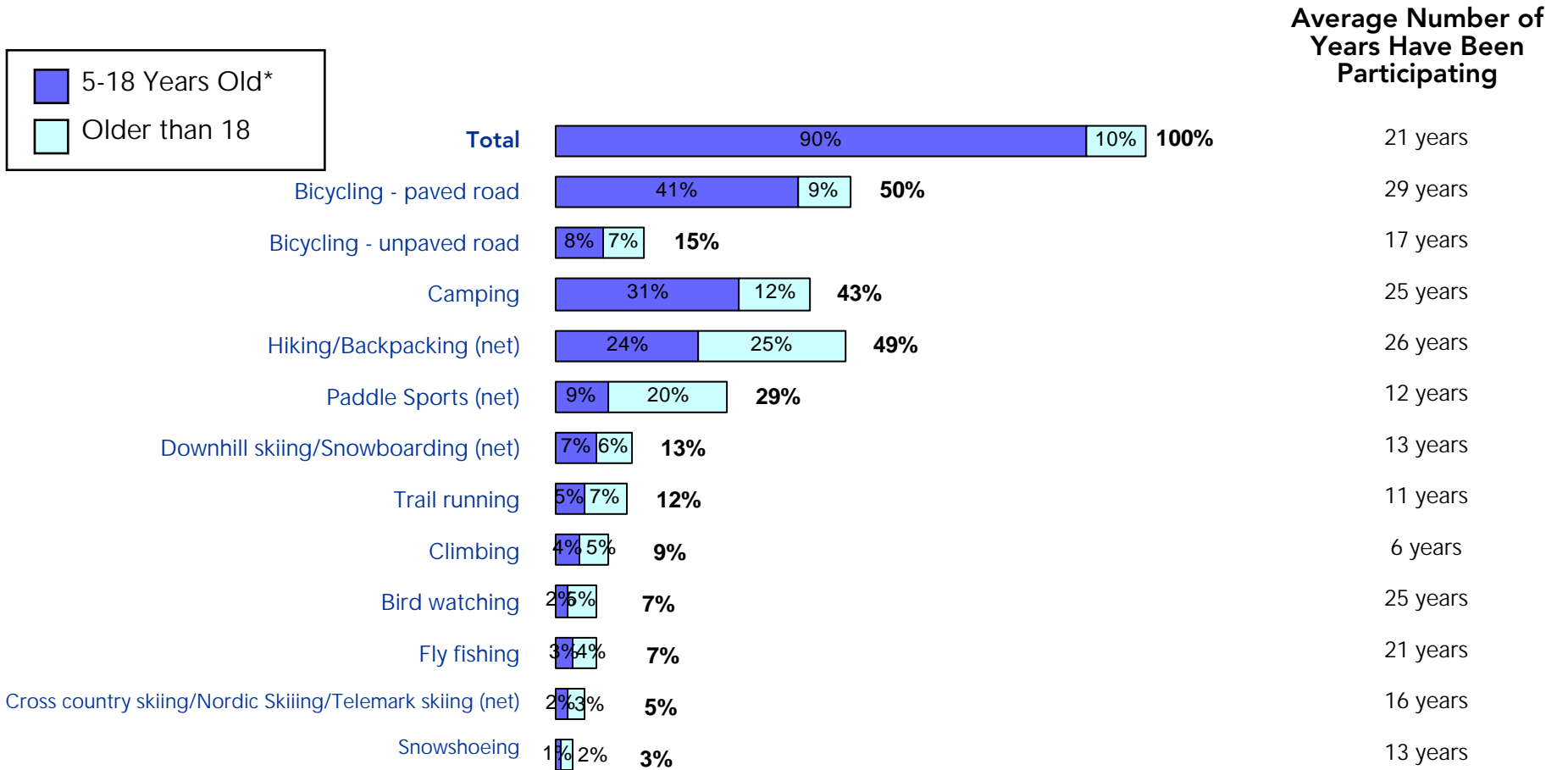


## Spending By Number of Activities Participate In





# When Started Activity – Among Participants



\*Participated 5-18 and currently participate

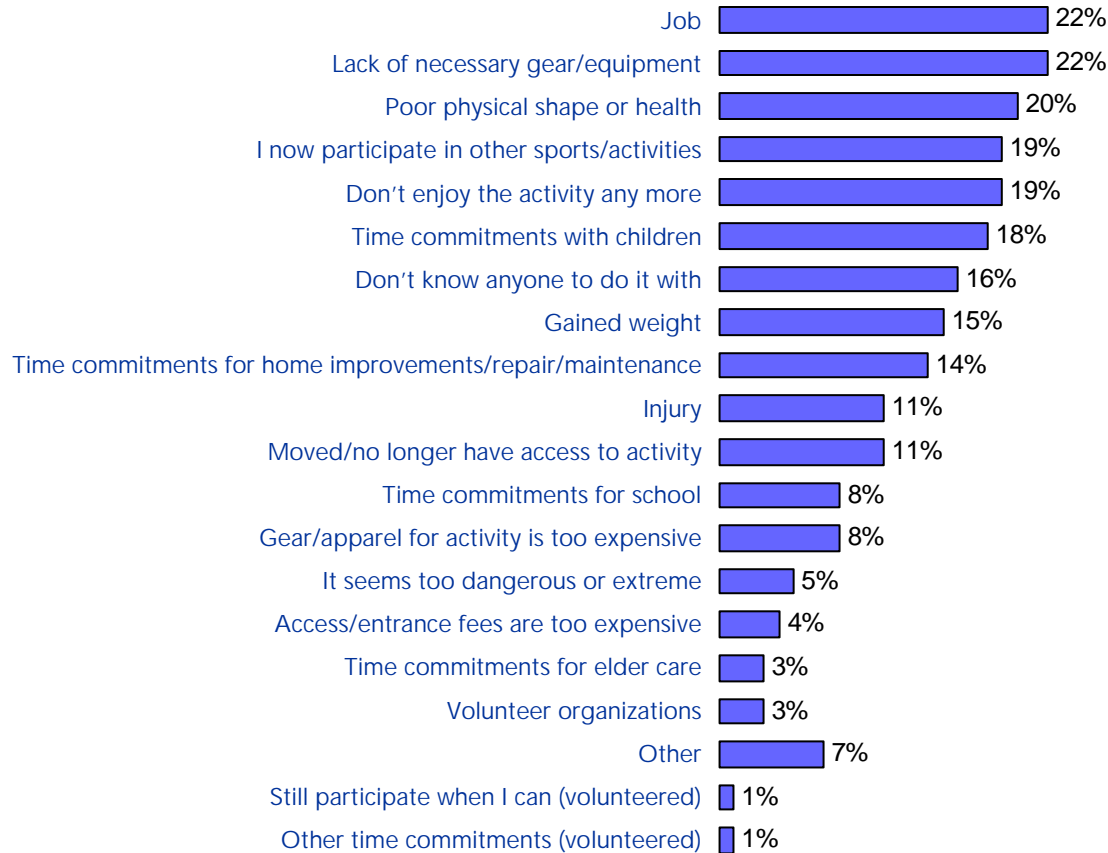


# Favorite Activity Among Participants

| Reasons for Starting  |    | Reasons for Stopping                                       |    | Reasons for Starting Again                     |    |
|---|----|--|----|--|----|
|   | %  |  | %  |  | %  |
| Parents/Guardians/Family members  | 41 | General time constraints/Too busy                          | 21 | I missed participating in the outdoor activity | 38 |
| Friends/peers who were already active in it   | 33 | Location not convenient (i.e. moved/<br>too far to travel) | 12 | My friends influenced me                       | 21 |
| Friends/peers who also wanted to try it   | 31 | Job got in the way   | 10 | My child(ren) was interested                   | 19 |
| Boy Scouts programs, camps  | 10 | Injuries/Health reasons                                    | 10 | I wanted to lose weight                        | 15 |
| Church group or other religious organization  | 8  | School commitments   | 8  | I lost weight/Improved physical shape          | 11 |
| School-related clubs/athletics  | 6  | Lost interest/desire                                       | 7  | My spouse/Family Member (Volunteered)          | 7  |
| Girl Scouts programs, camps   | 6  | Pregnancy/birth of a child                                 | 6  | I retired from working full time               | 4  |
| Books   | 6  | Family commitments   | 6  | I now have more money to invest in it          | 4  |
| Media – newspaper, magazine, Internet, etc.   | 5  | Do not have the equipment                                  | 5  | Doctor's recommendation                        | 3  |
| Personal Interest (Volunteered)   | 4  | Money issues   | 4  | Church club/activity                           | 3  |
| Camps not affiliated with organizations such<br>as Scouts, YMCA   | 3  | Got married  | 4  | Other social club/activity                     | 3  |
| Movies  | 3  | Entered the military                                       | 4  | My parents/guardians influenced me             | 3  |
| YMCA/YWCA programs, camps   | 2  | Got a drivers license/vehicle                              | 4  | Boy Scouts                                     | 3  |
| Boys & Girls Clubs programs, camps  | 2  | Participated in other activities instead                   | 4  | Camp Fire                                      | 2  |
| Camp Fire programs, camps   | 2  | Could not find anyone to do activity with                  | 3  | Between jobs                                   | 2  |
| Community organization/club not affiliated with<br>school –Rainbow Girls, Mountaineering clubs,<br>etc. | 2  | No opportunity   | 1  | School club/activity                           | 1  |
| Retailer-sponsored events, such as a local<br>sporting good store clinic or race                        | 2  | Age/Felt too old   | 1  | Girl Scouts                                    | 1  |
| Local Gym, gym-sponsored events or programs,<br>including indoor climbing center                        | 2  | Other  | 11 | My parents/guardians forced me to              | -  |
| Outdoor educational programs such as<br>Outward Bound   | 1  | No reason for stopping                                     | 1  | Boys and Girls Club                            | -  |
| A sports icon   | 1  | Not sure   | 1  | Other  | 20 |
| Other   | 6  |  |    | No influences (Volunteered)                    | 2  |
| Nothing (Volunteered)   | 3  |  |    |  |    |



# Reasons for Stopping an Activity Indefinitely\*



\*Among those who lapsed for any activity





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# Actions Considered Effective in Encouraging Youth to Experience Outdoor Activities

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



# Activities or Actions Effective at Encouraging Adults to Participate

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



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