



Connecting Californians to the Outdoors
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Outdoor Participation Today

OUTDOOR RECREATION PARTICIPATION STUDY

for the United States



2004
6th edition

- ★ 3/4 of US Population participates in at least one outdoor activity at least once a year
 - ★ Majority are white (79%) -very very slightly decreasing
 - ★ Majority are males (56%) – increasing
 - ★ 85% of young adults are participants – increasing
 - ★ Average participant is middle class
- ★ Westerners participate in day hiking, camping, off-road, fishing, backpacking & small game hunting at higher rates than rest of country.

Note: Data refers to Americans 16+

ACTIVITY TRENDS (1998 to 2004)

Growth

Trail Running -- 40 million (20% growth)
Canoeing -- 22 million (16% growth)
Kayaking -- 10 million (130% growth)
Snowshoeing -- 5 million (50% growth)
Free-heel skiing -- 4 million (167% growth)

Decline

Car Camping -- 49 million (18% decline)
Backpacking -- 13 million (23% decline)

Core Biggies

Biking -- 86 Million (decline 5%)
Fishing -- 80 million
Hiking -- 75 million (flat)
Camping -- 68 million (decline 9%)

EXPLORING THE ACTIVE LIFESTYLE

An Outdoor Industry Foundation Consumer Outreach Report
January 2004 EXECUTIVE SUMMARY



HEALTH ATTITUDES

OUTDOOR PARTICIPANTS SELF-PERCEPTIONS:

- ★ 79% - proactive about managing their health
- ★ 50% - Use outdoor activities as their main form of exercise
- ★ 83% say they protect the environment
- ★ 8 out of 10 feel active outdoor recreation:
 - improves family relationships
 - reduces stress
 - Promotes a feeling of accomplishment
 - Provides an “Escape”

NOTE: 65% of Americans are overweight

START THEM YOUNG

90% of current participants were introduced between the ages of 5 and 18

- ★ 85% of young adults participate in active outdoor recreation
- ★ Young adults participate in these activities with higher frequency than other groups
- ★ 63% of participants participate in more than one activity
- ★ Family “adventure” vacations are growing
 - hiking/backpacking
 - Swimming
 - Fishing
 - camping

WHAT HOOKS YOUTH?

MENTORS & SOCIAL NETWORK IS KEY

- ★ Majority cite parents/family and friends key influencers
- ★ 30% cited clubs/groups and organizations
- ★ **Red Alert -- only 30% of Americans have introduced another to their favorite outdoor activity although 65% of active boomers would like their children to be active in outdoor recreation.**

BARRIERS TO PARTICIPATION?

- Top Challenges are time (for adults) and costs associated with gear and equipment.
- Top Challenges for youth are “other activities”
- Lull in participation in mid-twenties to mid-thirties
- Top Reasons for permanently stopping an activity is other (more pressing) time commitments

WOMEN

- ★ Women's participation has declined in last 3 years although up over 7 years. (what happened?)
- ★ 34% report being inexperienced outdoor recreationists without an outdoors mentor
- ★ Women make majority of family spending and vacation decisions. (80% of all purchases)
- ★ Key activities for women: car camping, biking, snowshoeing and, drumroll....fly fishing
- ★ **Attract the Mom, and you have the family**

YOUNG ADULTS (16-24)

- ★ 16-24 year olds participate at higher percentages than any other age group – bright spot in participation growth
- ★ Actively seek more challenging activities
 - ★ Hot: Biking, Car Camping, Fly Fishing, Kayaking, Trail Running
- ★ Likely to do more activities than any other group
- ★ 42% of them consider themselves intermediate level
- ★ **Introduced by a “trusted source”**



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