



# **Trends in Active Outdoor Recreation Participation in United States:**

**Findings from the 7th Edition Participation Study  
For the years 1998 - 2004**

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# Activities Tracked in Participation Study

## Tracked Activities 1998-2004

Backpacking  
Biking – Paved Road  
Biking – Single Trak  
Biking – Dirt Trak  
Camping Away from Car  
Car Camping  
Canoeing  
Cross-Country/Nordic Skiing  
Hiking  
Rafting  
Snowshoeing  
Telemark Skiing  
Trail Running

## Tracked Activities 2001 – 2004 only

Bird Watching  
Climbing – Artificial Wall  
Climbing – Ice  
Climbing – Natural Rock  
Fly Fishing  
Kayaking – Sit on Top/Recreational  
Kayaking – Touring/Sea  
Kayaking – Whitewater

## Tracked Activities 2004 only

Fishing (non-fly)



# Nearly 3 in 4 Americans participated in a human powered outdoor activity in 2004

- 159 million Americans (16+ years old) participated in at least one of 22 human powered outdoor activities in 2004 (71.6% of US Population)
- The general activities with the largest participation levels were:
  - Bicycling, any type (38.6% of Americans 16+ participated)
  - Fishing, any type (36.2% of Americans 16+ participated)
  - Hiking (33.9% of Americans 16+ participated)
  - Camping, any type (29.6% of Americans 16+ participated)
  - Trail running (17.8% of Americans 16+ participated)
  - Paddling (14.3% of Americans 16+ participated)
- In terms of actual outings, the lead activities in 2004 were:
  - Paved road biking
  - Non-fly fishing
  - Trailrunning
  - Hiking
- These 159 million Americans participated an average of 52 times each in human powered outdoor activity outings in 2004, representing over **8.3 billion** total outdoor activity outings (among 22 activities tracked).



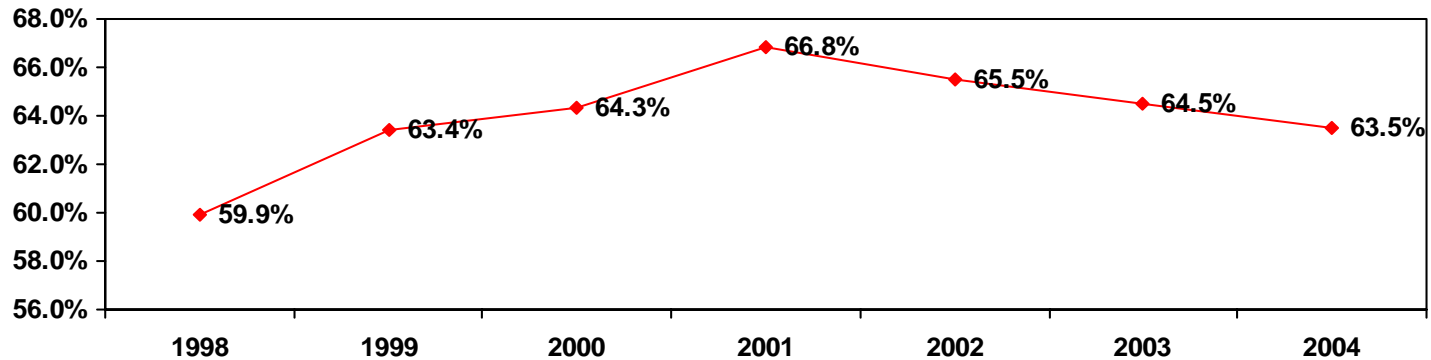
# A higher percentage of Americans participated in outdoor activities in 2004 compared to 1998

- Among the 13 activities tracked since 1998, 141 million (63.5%) Americans 16+ participated in at least one outdoor activity in 2004.
  - 6% increase vs. 1998 levels (the year the study began).
- Specific activities driving total outdoor participation growth were:
  - Trail running (20% growth to 40 million Americans 16+)
  - Canoeing (16% growth to 22 million)
  - Kayaking, any type (130% growth to 10 million)
  - Snowshoeing (50% growth to 5 million)
- Although participation levels were higher in 2004 compared to 1998, they have consistently decreased since 2002.
  - 63.5% of Americans in 2004
  - 64.5% of Americans in 2003
  - 65.5% of Americans in 2002



# Participation in 13 outdoor activities tracked since 1998

Percent of Americans 16+ participating in at least one of the 13 outdoor activities



—◆— Participation (% of Americans 16+)



## Although a higher percent of Americans are participating in outdoor activities, total outings have remained flat since 1998

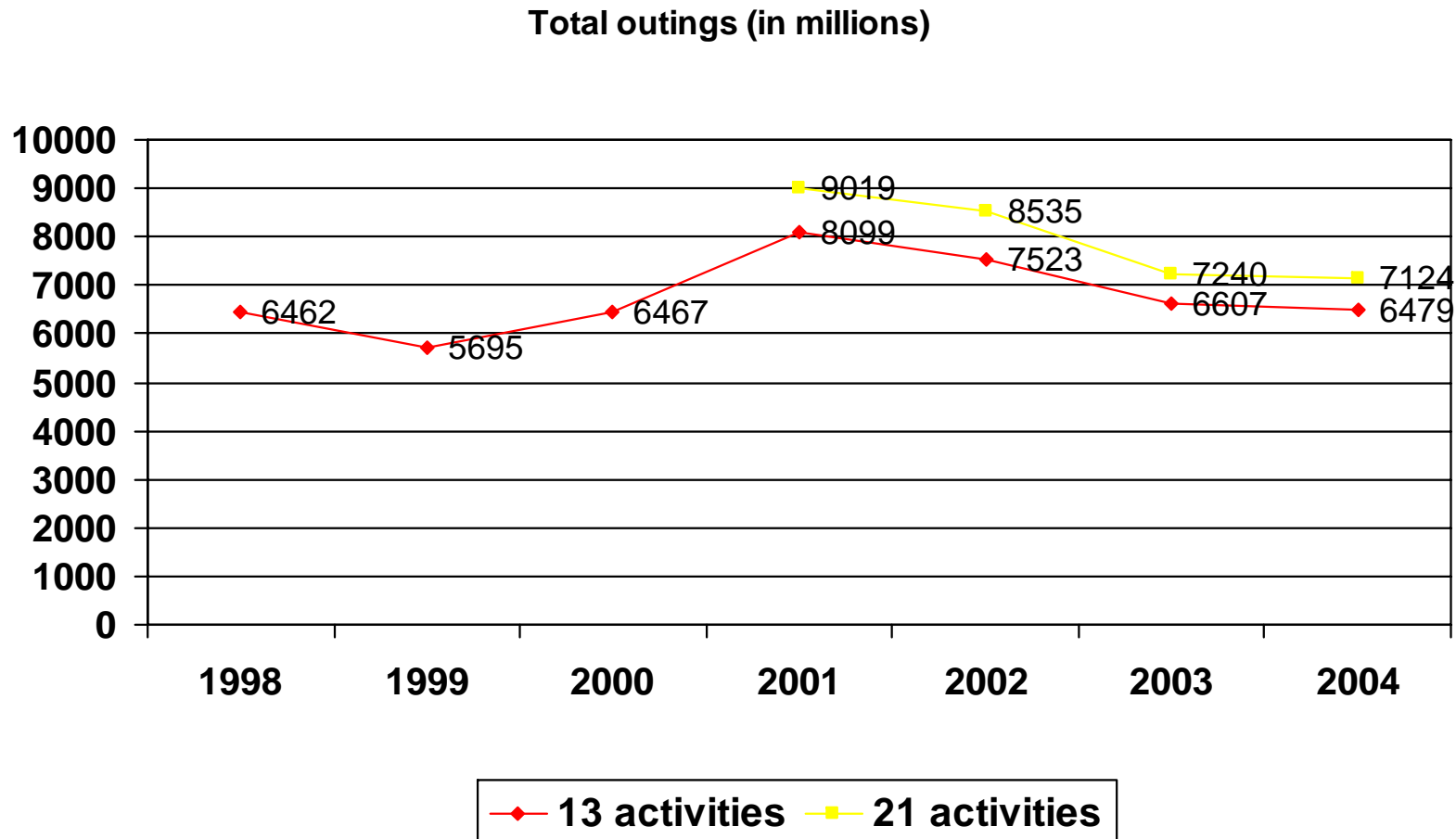
- Among the 13 activities tracked since 1998, 63.5% of Americans 16+ participated in human powered outdoor activity outings, resulting in 6.5 billion total outings in 2004.
  - However, in 1998, a lower percentage of Americans participated (59.9%) but their total outings were 6.5 billion--the same as 2004
- The specific activities which grew in the number of outings from 1998 to 2004 were:
  - Trail running (258 million to 1.1 billion total outings in 2004)
  - Hiking (128 million outings to 828 million total outings in 2004)
  - Cycling single track (113 million to 632 million total outings in 2004)
  - Snowshoeing (20 million to 28 million total outings in 2004)
  - Rafting (10 million to 29 million total outings in 2004)
- Comparing 2004 to 2002 (21 activities tracked), total outings decreased 17% (from 8.5 billion in 2002 to 7.1 billion in 2004)
- The specific activities which had the largest decrease in total outings from 2002 to 2004 were:
  - Bird watching (decline of 475 million to 166 million total outings)
  - Cycling single track (decline of 316 million to 632 million)
  - Cycling dirt road (decline of 271 million to 640 million)
- Total outings is an important measure of participation in outdoor activities as it accounts for the number of participants and the frequency of their participation.

\* An Outing is defined as a single event or occurrence regardless of location. Ex: A bicycle ride on a weekday evening around the neighborhood would equal one outing.



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# Total outings in 13 and 21 tracked activities



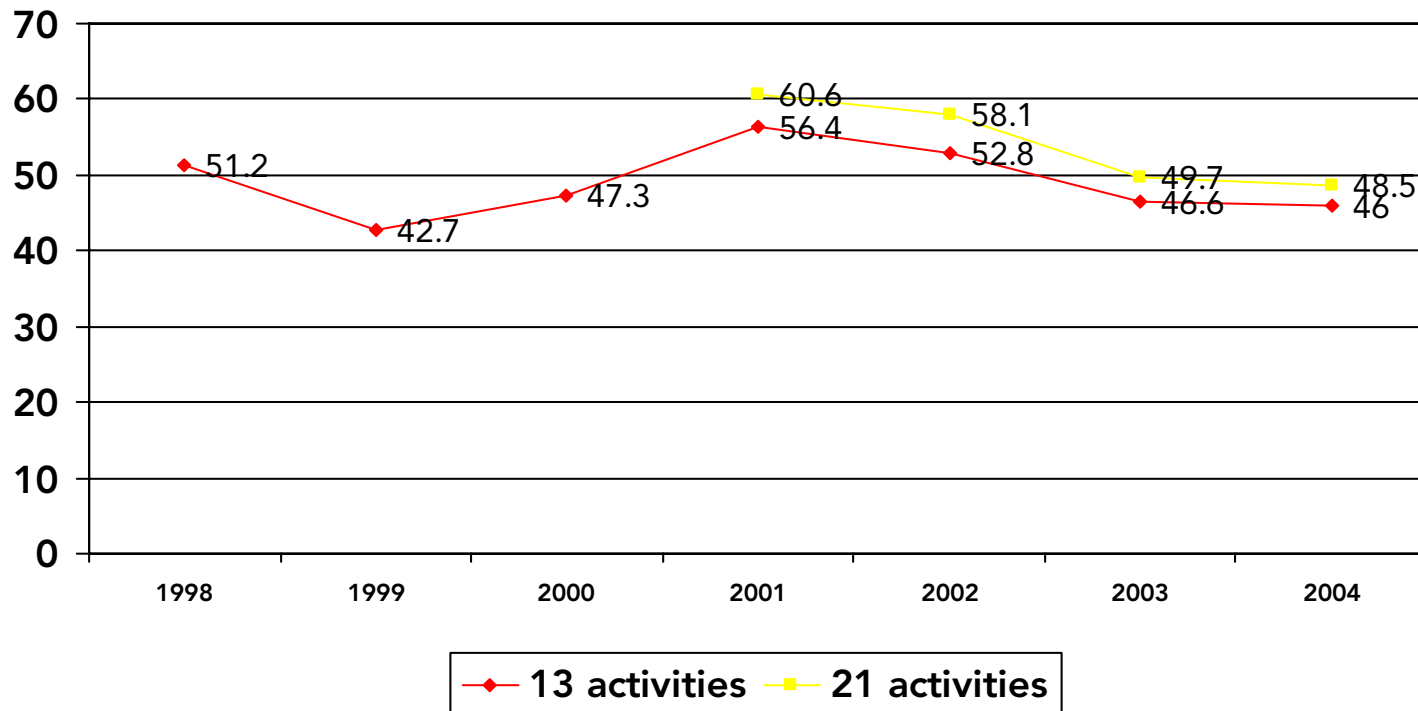
## The increase in Americans participating in outdoor activities has not resulted in individuals getting out more, on average

- In 1998, 59.9% of Americans 16+ participated, resulting in 6.5 billion total outings, or an average of 51.2 outings per participant (among 13 activities tracked)
  - However, in 2004, 63.5% participated, resulting in 6.5 billion total outings (again, 13 activities tracked) or an average of 46 outings per participant--a decrease of 10% in average outings
- Comparing 2004 to 2002 (21 activities tracked), average outings decreased 17% or 48.5 outings vs. 58.1, respectively.
- This supports the hypothesis that Americans may increasingly desire human powered outdoor experiences, but are more challenged than ever to get out and do them, resulting in fewer actual outings.



# Average outings in 13 and 21 tracked activities

Average outings per participant



# Emerging activities have driven total outdoor participation growth (vs. traditional mainstream activities)

- Although total participation levels have grown from 1998 to 2004, it has been driven by large growth in emerging activities like:
  - Trail running (20% participation increase to 17.8% of Americans 16+)
  - Canoeing (16% participation increase to 10% of Americans 16+)
  - Kayaking any type (130% participation increase to 4.6% of Americans 16+)
  - Snowshoeing (50% participation increase to 2.1% of Americans 16+)
- These increases have offset participation decreases in traditional mainstream activities historically important to introducing new participants to human powered outdoor recreation
  - Bicycling any type (5% decline to 38.6% of Americans 16+)
  - Camping, any type (9% participation decline to 29.6%)
  - Backpacking (23% participation decline to 6%)
- Hiking continues to draw approximately 34% of all Americans



# Activities which can be “done-in-a-day” are growing vs. activities which require multiple days to participate

- In general, the activities which have grown both participation incidence and total outings are those considered “done-in-a-day” activities
  - Specific activities with largest increase in participation and outings, from 1998 to 2004 (13 activities tracked):
    - Trail running (increased 20% in participation and 31% in outings)
    - Snowshoeing (increased 50% in participation and 250% in outings)
    - Hiking (flat participation and 18% increase in outings)
    - Canoeing (16% increase in participation, but 18% decline in outings)
      - Decrease in outings in 2004 could be explained in part by favorable water levels in 1998 resulting in highest number of outings in 7 years
  - Specific activities with largest increase in participation and outings, from 2002 to 2004 (21 activities tracked):
    - Paved road cycling (9% increase in participation and flat in outings)
    - Fly fishing (58% increase in participation and 90% increase in outings)
  - The specific activities with the largest **decrease** in participation and outings from 1998 to 2004 are multi-day activities:
    - Backpacking (decrease of 23% in participation and 33% in outings)
    - Car camping (decrease 18% in participation and 28% in outings)



# A higher percentage of Americans participated in outdoor activities at “enthusiast” levels in 2004 than 1998

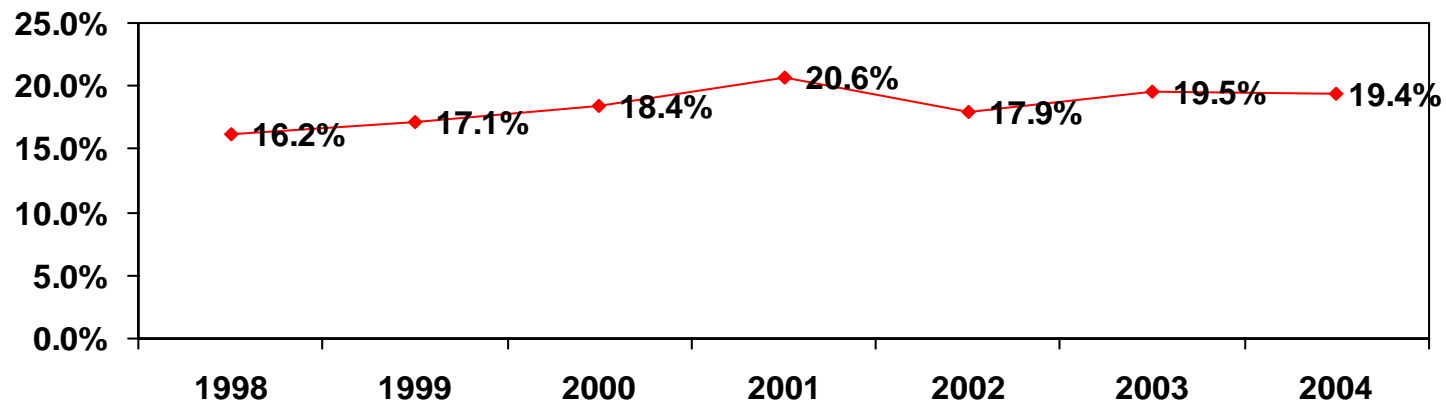
- In addition to total participation incidence increasing, the percent of Americans participating in at least one of the 13 core activities at high frequencies (Enthusiasts\*) increased to 19.4% in 2004 (vs. 16.2% in 1998). This is an increase of 17% over 7 years.
  - Nearly 1 in 5, or 43.1 million Americans 16+ was considered an enthusiast in at least one outdoor activity in 2004 (13 activities).
- The specific activities with the greatest increase in incidence of Enthusiast participation in 2004 (vs. 2002), combined with a definition of Enthusiast frequency which increased or was unchanged during that time were:
  - **Cycling, paved road 52+ times/year (+4% to 12 million Americans 16+)**
  - **Hiking 15+ times/year (+6% to 11.3 million)**
  - Canoeing 7+ times/year (+14% to 3.6 million)
  - Camping away from car 7+ times/year (+9% to 2.7 million)
- Since Enthusiast levels track the top 15% of participation frequency in an activity, the Enthusiast cut-off varies year to year, making it possible for Enthusiast level incidence to increase, but total outings by these Enthusiasts to decrease.
  - Example: In 2002, **2.7%** of Americans cycled on dirt roads **25+** times (top 15% frequency) which contributed to a total of 911 million outings. In 2004, **3.4%** of Americans cycled on dirt roads **20+** times (top 15%) which contributed to a total of 640 outings. The increase in Enthusiast incidence did not offset a total outings decrease.

\*Note: The enthusiast participation frequency level represents the number of different outings that were within the highest 15% of all participation frequencies reported for the year.



# Americans 16+ participating at top 15% frequency (Enthusiasts)

Percent of Enthusiast Americans 16+ participating in 13 activities at  
Top 15% levels



—◆— Enthusiasts



# More young adults (Gen Y) participating in outdoor activities in 2004

- Gen Y\* is not abandoning human powered outdoor activities; 80.7% participated in at least one of the 13 activities tracked since 1998, in 2004.
  - 80.7% participation among 16-24 year olds in 2004 vs. 77.8% in 1998
  - Although 16-24 year olds represented 18% of U.S. population 16+ in 2004, they represented 26% of outdoor activity participants.
- Specific activities which had the highest level of 16-24 year old participants in 2004:
  - Natural rock climbing (69% of participants were 16-24 years old)
  - Artificial rock climbing (68% of participants were 16-24 years old)
  - Backpacking (50% of participants were 16-24 years old)
  - Whitewater kayaking (48% of participants were 16-24 years old)
  - Camping away from car (47% of participants were 16-24 years old)
  - Trail running (45% of participants were 16-24 years old)
- Specific activities with the most young adult participants were:
  - Paved Road Biking (19.5Million)
  - Non-fly fishing (17.6 million)
  - Hiking (16.4 million)
  - Mountain Biking (15.7 million)
- Specific activities with the highest outings were:
  - Paved Road Biking
  - Trail Running
  - Mountain Biking
  - Non-fly Fishing

\*Generation Y is generally defined as those born on or after 1978, thus comprising the majority of 16-24 year olds in the U.S. as of 1999.

\* Total population derived from 2004 US Census data



# More women participated in outdoor activities in 2004 than in 1998, but participation has decreased since peak in 2002

- The good news is that 58.8% of females participated in at least one of the 13 activities, up from 53.4% in 1998.
  - Female participation at Enthusiast level also increased from 11.8% in 1998 to 15% in 2004. This was driven by car camping and dirt road biking.
- The bad news is that female participation in 2004 was down compared to 2002 levels (62.8%)
  - Female participation at Enthusiast level was flat in 2004 vs. 2002 (15%)
- Specific activities which females were most likely to participate in 2004 were:
  - Bicycling, paved road (31.1% of women 16+ participated)
  - Hiking (30.6% of women 16+ participated)
  - Fishing, non fly (24.6% of women 16+ participated)
  - Car camping (19.9% of women 16+ participated)
- Only two activities saw participation increases among women in the past 3 years:
  - Bicycling, paved road (+8.4% to 35.7 million)
  - Fly fishing (+71.9% to 6.3 million)
- Specific activities with the most female participants were:
  - Paved Road Biking (35.7 Million)
  - Hiking (35.2 Million)
  - Non-fly fishing (28.3 million)
  - Car Camping (22.9 million)
- Specific activities with the highest outings by women were:
  - Paved Road Biking
  - Trailrunning
  - Fishing
  - Hiking

\* Note: According to the Leisure Trak Study by Leisure Trends Group, women are increasing their participation in fitness related activities.



# Participation by Ethnic Americans in outdoor activities at an all-time high in 2004

- As America has increasingly become more ethnically diverse, so has participation in outdoor activities. In 2004, 1 in 5 participants in outdoor activities were ethnically diverse (21%), a significant increase over 1998 levels (16%) and 2002 levels (19%).
- Although ethnically diverse participation remains lower than the diversity in the U.S. population, the gap has been steadily decreasing.
  - In 1998 25% were ethnically diverse vs. 16% of outdoor participants (9 point difference)
  - In 2004, 27% were ethnically diverse vs. 21% of outdoor participants (6 point difference)
- Encouragingly, Ethnic Americans are participating at increased frequencies: they made up 17% of Enthusiasts in 2004, vs. 13% in 1998.
- Specific activities which had the highest percentage of ethnically diverse participants in 2004 were:
  - Backpacking (31% of participants were Ethnic Americans)
  - Trail running (27%)
  - Kayaking, touring/sea (27%)
  - Bicycling, single track (25%)
  - Camping, away from car (24%)
- Most popular activities for ethnically diverse participants were:
  - Biking (all types)
  - Non-fly fishing
  - Trailrunning
  - Hiking
- Specific activities with the highest number of outings for Ethnic Americans were:
  - Biking (all types)
  - Non-fly fishing
  - Trail running

\* Note: For the purposes of this study, Ethnic Americans is defined as non-Caucasians (as outlined by the US Census.



# Growth of fly fishing and paved road cycling in the past 3 years has offset participation declines in most outdoor activities

- Although overall participation in outdoor activities has remained flat since 2002, few individual activities were flat during that time.
- Only two activities, of 21 tracked, grew participant levels and number of outings between 2002 and 2004:
  - Paved road bicycling (+8.9% to 79.1 million participants)
  - Fly fishing (+57.7% to 18.2 million)
- Specific activities with the largest declines in participants each year since 2002:
  - Artificial wall climbing (-34.3% to 5.1 million)
  - Snowshoeing (-22.2% to 4.7 million)
  - Rafting (-20.4% to 9.6 million)
  - Bird watching (-19.0% to 15.1 million)



# 1 in 4 Americans took a vacation to participate in active outdoor activities in 2004

- 25%, or 55.5 million Americans 16+ took a vacation where the primary purpose was outdoor adventure.
  - This has been increasing since 2001--indicating that outdoor adventure travel has rebounded from the events of Sept. '01.
- The leading activities participated in on these outdoor adventure vacations were:
  - Hiking, includes backpacking (17.1%)
  - Swimming (16.9%)
  - Fishing (15.0%)
  - Camping (13.8%)
- The individuals participating in active outdoor vacations were basically the same demographic as those participating in outdoor recreation in general:
  - Male (58%)
  - Mean age 37
  - 21% non-white
- The fact that Americans participated in outdoor activities on vacation at the highest levels in 4 years (25%) in 2004, combined with growth in the percent who participate at Enthusiast frequencies (19.4%), suggests that there is an opportunity to market vacations designed for Enthusiasts as well as first-timers and occasional participants.



## About the 7th edition Participation Study

- The Outdoor Industry Foundation annual participation study is funded by the Outdoor Industry Foundation, with the purpose of annually tracking nationwide participation levels/trends for Americans 16+ years old in human powered outdoor recreation activities.
- The 2004 study was conducted by Leisure Trends Group, a independent research company based in Boulder, Colorado.
- The study has been conducted annually since 1998 and is the most comprehensive study of its kind focused primarily on human powered outdoor recreation activities in the U.S.
- 13 activities were tracked when the study began. Since then, additional activities have been added. Thus, the ability to make year to year comparisons varies by activity as well as the ability to make year to year participation comparisons to general U.S. population. In 2004, one new activity was added, "Fishing (non fly)", resulting in a total of 22 activities tracked as part of the study.
- For the purposes of this study, Ethnic Americans is defined as non-Caucasians (as outlined by the US Census.
- For the 7th edition, 4,000 telephone interviews were conducted using scientific sampling and random digit dial methodology. Result is a margin of error of +/- 1.6% at the 95% confidence level.
- *Thank you to Outdoor Retailer for their generous financial underwriting without which this report would not have been possible.*

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