2023 OUTDOOR PARTICIPATION TRENDS REPORT

OUTDOOR FOUNDATION

OUTDOOR INDUSTRY ASSOCIATION

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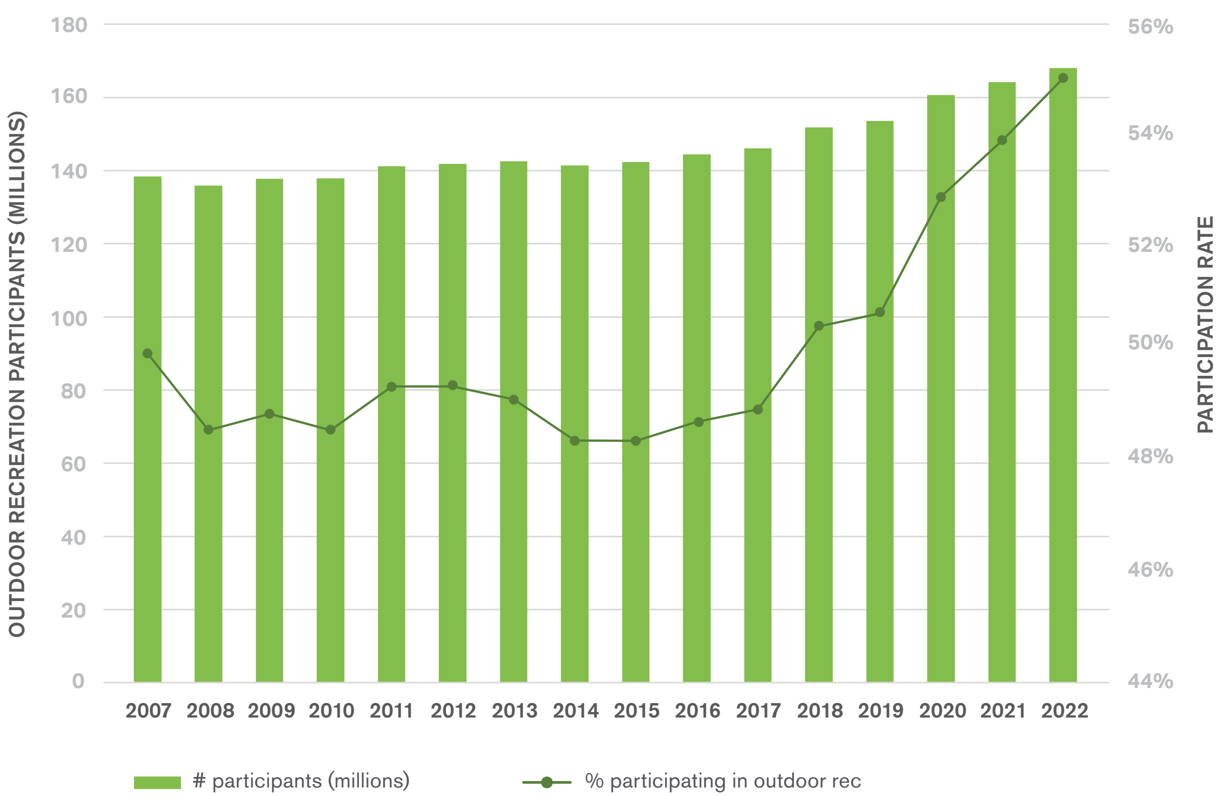
EXECUTIVE SUMMARY

The outdoor recreation participant base grew 2.3% in 2022 to a record 168.1 million participants or 55% of the U.S. population ages 6 and older. The outdoor recreation participant base has grown each of the last eight years, adding 14.5 million participants since January 2020. Although 2022 outdoor recreation included record numbers of participants and participation rates, the number of outings per participant declined in 2022 for the first time since the pandemic began in 2020.

OUTDOOR RECREATION PARTICIPANT COUNT AND PARTICIPATION RATE 2007 TO 2022



We saw continued growth in the number of Americans who participate in outdoor recreation, even as pre-pandemic routines are reestablished, indicating that outdoor recreation is effectively engaging participants gained over the past three years, but they participate less frequently than earlier cohorts did. The participant base is becoming more diverse across ethnicity/race, education, and age. The data reveals a stable outdoor recreation participant base with key opportunities in demographic segments showing significant growth.

About this report: For over 15 years, the Outdoor Participation Trends Report has served as the most trusted and comprehensive source of insights and narratives around who's doing what, when, and how outdoors. The Outdoor Foundation, the philanthropic arm of Outdoor Industry Association, funds the research that produces the Annual Outdoor Participation Trends Report and publishes the findings in partnership with OIA every year.

KEY INSIGHTS

PARTICIPANT BASE GROWTH

THERE HAS BEEN RECORD GROWTH IN THE TOTAL PARTICIPANT BASE.

The number of outdoor recreation participants **increased 2.3% to a total of 168.1 million Americans in 2022.**

This equates to

55%

of the U.S. population over the age of 6

For purposes of comparison, here are 2022 statistics reflecting total American participation in other activities.

34%
OF AMERICANS ATTENDED SPORTING EVENTS

51%
OF AMERICANS READ A BOOK

70%
OF AMERICANS WORKED FULL-TIME

74%
OF AMERICANS DRANK COFFEE

DIVERSITY

THE RECREATIONAL PARTICIPANT BASE IS MUCH MORE DIVERSE THAN EVER BEFORE.

New and young outdoor participants are significantly more diverse than the current outdoor base and overall U.S. population and are accelerating quickly.

As a whole, **diverse ethnic/racial groups are still underrepresented** in the outdoor participant base. We've got a lot more work to do here to engage and retain them.

The participation rate for Hispanic people has increased from 34% in 2015 to 56% in 2022.

The average annual growth rate for the Hispanic participant cohort is the highest of any group at 5.5% over the past five years.

The participation rate for Black people increased more than 5% in 2022 to 40.7%.

Black people continue to have the lowest overall participation rate in outdoor recreation, but that rate has increased in each of the past five years.

The only racial/ethnic group with increased average outings per participant in 2022 were Black outdoor recreation participants.

Black participants engaged in the highest number of outings on average compared to people in other racial/ethnic groups in 2022, at 80.9 outings per Black participant.

LGBTQIA+
(Lesbian, Gay, Bisexual, Transgender, Queer, Questioning, Intersex, Asexual plus)
participate in outdoor recreation at higher rates than heterosexual cisgender (people who retain the gender that was presumed for them at birth) Americans. In 2022, 61% of LGBTQIA+ people of all genders participated in outdoor recreation. From 15.8 million in 2021, more than 18 million outdoor recreation participants identified as LGBTQIA+ in 2022.

SENIORS

A SIGNIFICANTLY HIGHER PERCENTAGE OF SENIORS ARE PARTICIPATING IN OUTDOOR RECREATION.

As recently as 2018,
JUST 28%
of seniors (ages 55+) participated.

In 2022, the senior participation rate hit a record high of
35%
and rising.

This equates to
1 IN EVERY 5
outdoor participants and a total of 1 million new participants in 2022.

GATEWAY ACTIVITIES

GATEWAY ACTIVITIES CONTINUE TO DRIVE NEW ENTRANT OUTINGS AND FREQUENCY OF PARTICIPATION.

More people participated in most categories of activity in 2022. In fact, 80% of outdoor activity categories experienced participation growth in 2022, including large categories like camping and fishing and smaller categories like sport climbing and skateboarding.

Hiking is the most popular outdoor activity. Running, bicycling, fishing and camping round out the top five.

There were 881,000 new hikers in 2022. “Core” frequency increased 6% and casual was flat.

Camping had the second highest growth rate over the past three years at 29.1% per year.

94% of campers and 83% of hikers **participate in at least one other outdoor recreation activity.**

Running has the highest average outings per runner at 54 per year. The average hiker heads to the trail just six times per year.

The outdoor activity categories with the highest growth rates among kids in 2022 included **backpacking, snowshoeing, canoeing, climbing, and off-road triathlon.**

"Gateway activities" are typically the first or one of the first outdoor recreation activities people participate in at any age. These are the activities that serve as magnets to outdoor activity and commonly lead to more activity outdoor in more niche categories like adventure racing or backpacking. It's important to engage these newly minted participants and help them explore more outdoor activity options.

PARTICIPATION RATE DECLINE

RECORD GROWTH IN THE PARTICIPANT BASE DOES NOT TRANSLATE TO PARTICIPATION RATES, WHICH ARE DOWN FOR THE FIRST TIME SINCE THE PANDEMIC.

Americans racked up more than 11.8 billion outdoor recreation outings in 2022, **but the frequency of participation is declining across outdoor recreation.**

In 2013, the average number of outings per participant was 84.6; **10 years later, it was down to 71.8 per participant.**

Opportunity exists in finding ways to engage these new consumers and consider strategies to increase frequency across several growing and emerging activities for seniors, families, youth and BIPOC individuals.

Gender, ethnicity, income and education levels somewhat predict participation rates. For instance, white males with higher incomes correspond to higher participation rates.

Outings for families with children (people 17 and younger) are declining; this statistic dropped from 85 outings in 2012 to 66 in 2022. Families with young children tend to be more active than families with older children; the rate drops off in teenage years.

RESEARCH HIGHLIGHTS

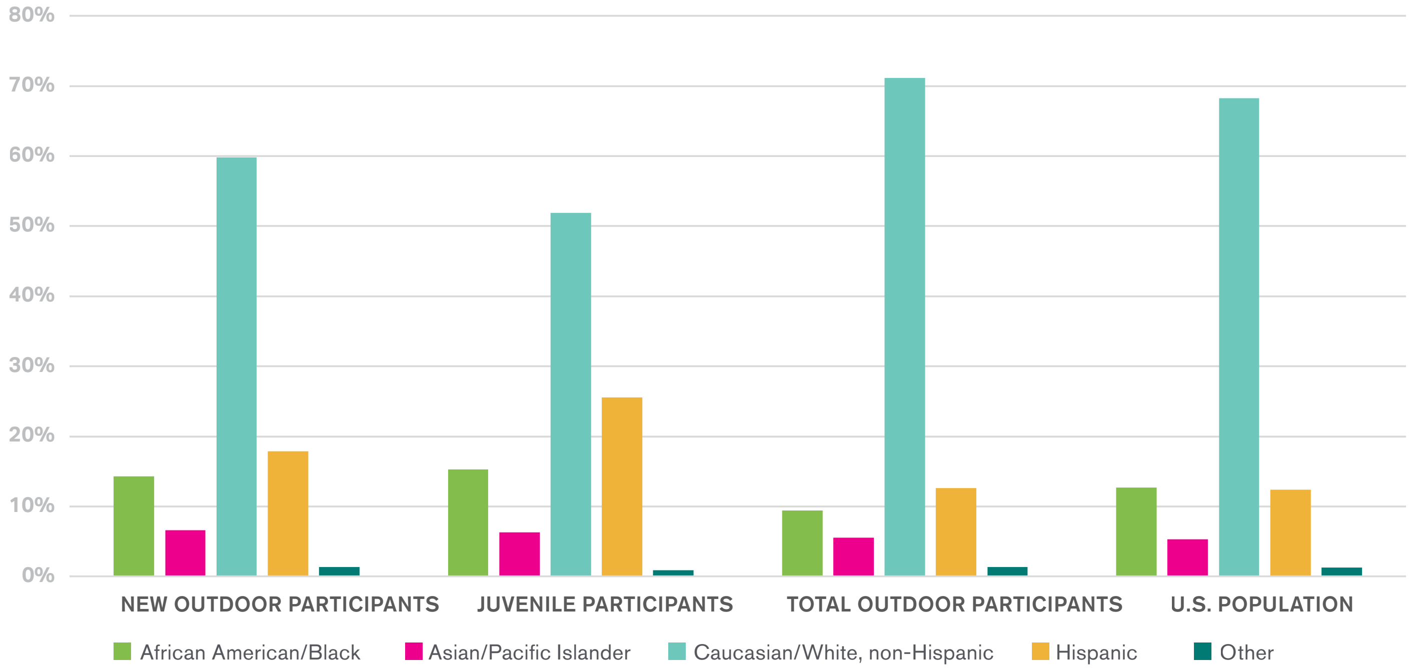
A high-level overview of 2022 research into recreational participation reveals greater diversity and more young people; the most popular activities and those that are declining; and the average number of outings per participant. See many more specific pieces of information in the meat of the report.

NEW OUTDOOR PARTICIPANTS: YOUNG AND DIVERSE

The outdoor recreation participant base became more diverse in 2022 including increases in participation among Black people, Hispanic people, and LGBTQIA+ people. Additionally, Americans ages 55 and older continue to become more active and now represent 1 in every 5 outdoor participants.

Although the outdoor participant base isn't as diverse as the U.S. population, diversity among kids who participate and of new participants (participated for the first time in 2022) strongly indicate that efforts to maximize inclusivity in outdoor recreation are resulting in greater diversity.

NEW OUTDOOR PARTICIPANTS, YOUNG OUTDOOR PARTICIPANT, TOTAL OUTDOOR PARTICIPANTS, AND U.S. POPULATION DIVERSITY COMPARED 2022



MOST POPULAR OUTDOOR ACTIVITY CATEGORIES

More people participated in most categories of activity in 2022. In fact, 80% of outdoor activity categories experienced participation growth in 2022, including large categories like camping and fishing and smaller categories like sport climbing and skateboarding.

ANNUAL GROWTH IN LARGE OUTDOOR CATEGORIES INCLUDED:

12%
GROWTH IN CAMPING TO
51.4 MILLION CAMPERS

1.5%
GROWTH IN HIKING TO
59.6 MILLION HIKERS

4.1%
GROWTH IN FISHING (FLY, SALT, FRESH) TO
54.5 MILLION ANGLERS

6.5%
GROWTH IN ALL BIKING CATEGORIES (ROAD, BMX, MOUNTAIN) TO
54.7 MILLION CYCLISTS

THE FASTEST GROWING CATEGORIES IN OUTDOOR INCLUDED:

21%
ANNUAL GROWTH IN SNOWSHOEING

12%
ANNUAL GROWTH IN CAMPING

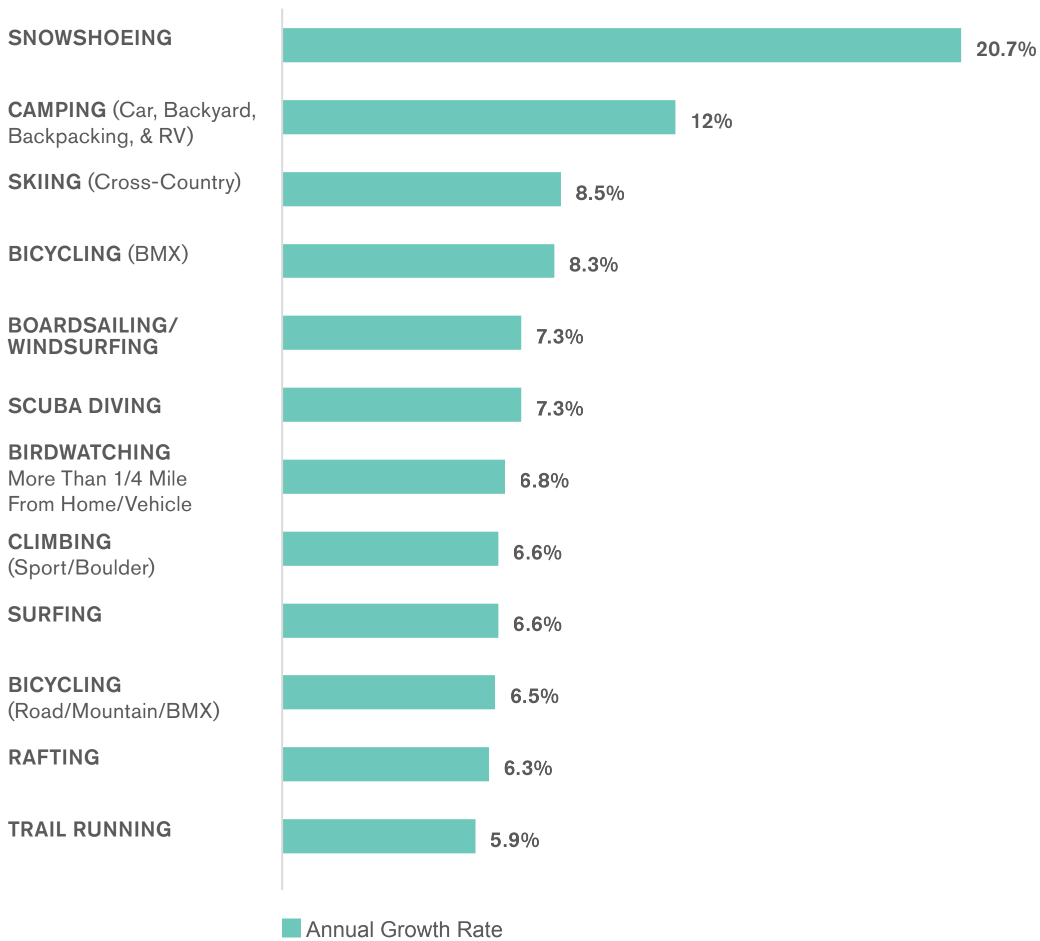
8.5%
ANNUAL GROWTH IN CROSS-COUNTRY SKIING

8.3%
ANNUAL GROWTH IN BMX BICYCLING

Outdoor recreation categories that experienced decline in 2022 included trap and skeet shooting, overnight backpacking, road running, and adventure racing. These categories lost 3.1 million participants in 2022 and have experienced year-over-year declines since 2020.

OUTDOOR ACTIVITY GROWTH RATES

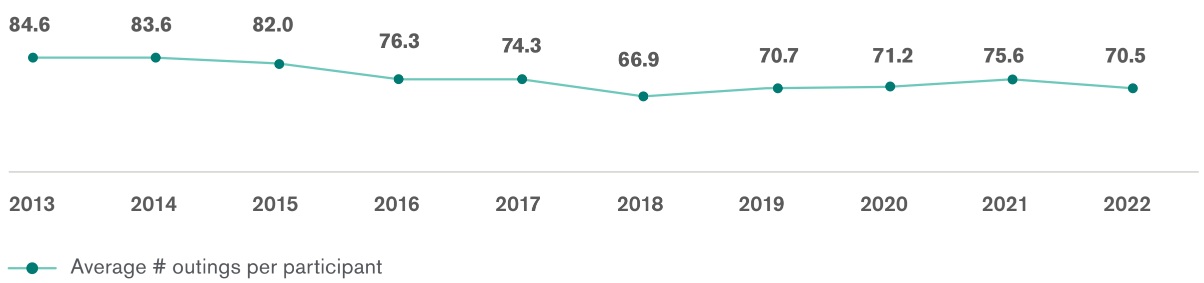
ANNUAL GROWTH RATE 2021 TO 2022



AVERAGE NUMBER OF OUTINGS PER PARTICIPANT DECLINED

In 2022, as the total number of participants increased, the average number of outings per participant declined for the first time since the pandemic started. This was also reflected in a decline in "core" participants who participate in outdoor recreation activities 51 times or more each year. The percentage of participants who met the criteria for "core" dipped below 30% for the first time in 2022, a long-term trend that has persisted for more than a decade despite a short and small pandemic driven bump.

AVERAGE # OUTINGS PER PARTICIPANT 2013 TO 2022



Younger generations including Gen Alpha (2013-present), and Gen Z (1997-2012) participated slightly less in outdoor recreation in 2022 while their elders in Gen X (1965-1980) and the Baby Boomers (1946-1964) participated more.

WHY DOES THIS DATA MATTER?

Knowing the size of the target market can help outdoor brands determine the potential demand for their products and services. This can assist in forecasting sales and production and allocating resources and marketing budgets accordingly. Understanding the demographics of the target market can help outdoor brands tailor their products and messaging to better meet the needs and preferences of their customers. For example, if a brand knows that a significant portion of its target market is made up of women in the middle Atlantic region who run trails a few times per month, it may choose to develop products and marketing campaigns that specifically target this demographic.

Information showing the frequency of participation in outdoor activities helps outdoor brands understand the level of engagement of their customers and identify opportunities to develop new products or services that will appeal to frequent (core) and infrequent (casual) participants.

Outdoor retailers know their customers, but keeping up with consumer, market, and industry trends takes a lot of time. The data available in this report is foundational; it is the primary source of information about the size, geographic dispersal, demographics, preferred activities, gateway activities and trends across outdoor recreation participation.

Demographics are changing quickly in the U.S. population, and the outdoor recreation market has lagged behind. Recognizing the need for increased diversity in the participant base, many industry-wide efforts to increase access to outdoor recreation for BIPOC (Black, indigenous, and people of color) people, including the Outdoor Foundation's Thrive Outside Initiative, have been established. The new and young outdoor participant bases are significantly more diverse than the total participant base, a formula for long-term growth in diversity for outdoor recreation. Monitoring progress on diversity is key to understanding if efforts are bearing fruit.

In summary, understanding consumers is essential for any business that wants to succeed in today's competitive marketplace. By gaining insights into the needs and preferences of their target audience, businesses can create products that meet their customers' needs, build loyalty, and drive sales and revenue growth.

Note:
A few types of statistics must be distinguished to promote clear understanding of the data. For instance, there's the number of participants but also the rate at which they participated, which may seem to contradict each other. For instance, it may be that thousands of people went skeet shooting, but if they only did so once (frequency), the rate of their participation is very low.

We also track two general groups of outdoor recreationalists: core participants, a person who participates in outdoor activities 51 times in a year or more; and casual, or infrequent ones.

DETAILED PARTICIPATION TRENDS

Here, we explore several segments in detail: overall outdoor recreation demographics; crossover participation the categories of most growth; churn; location; core categories; children; seniors; and new participants/lost participants.

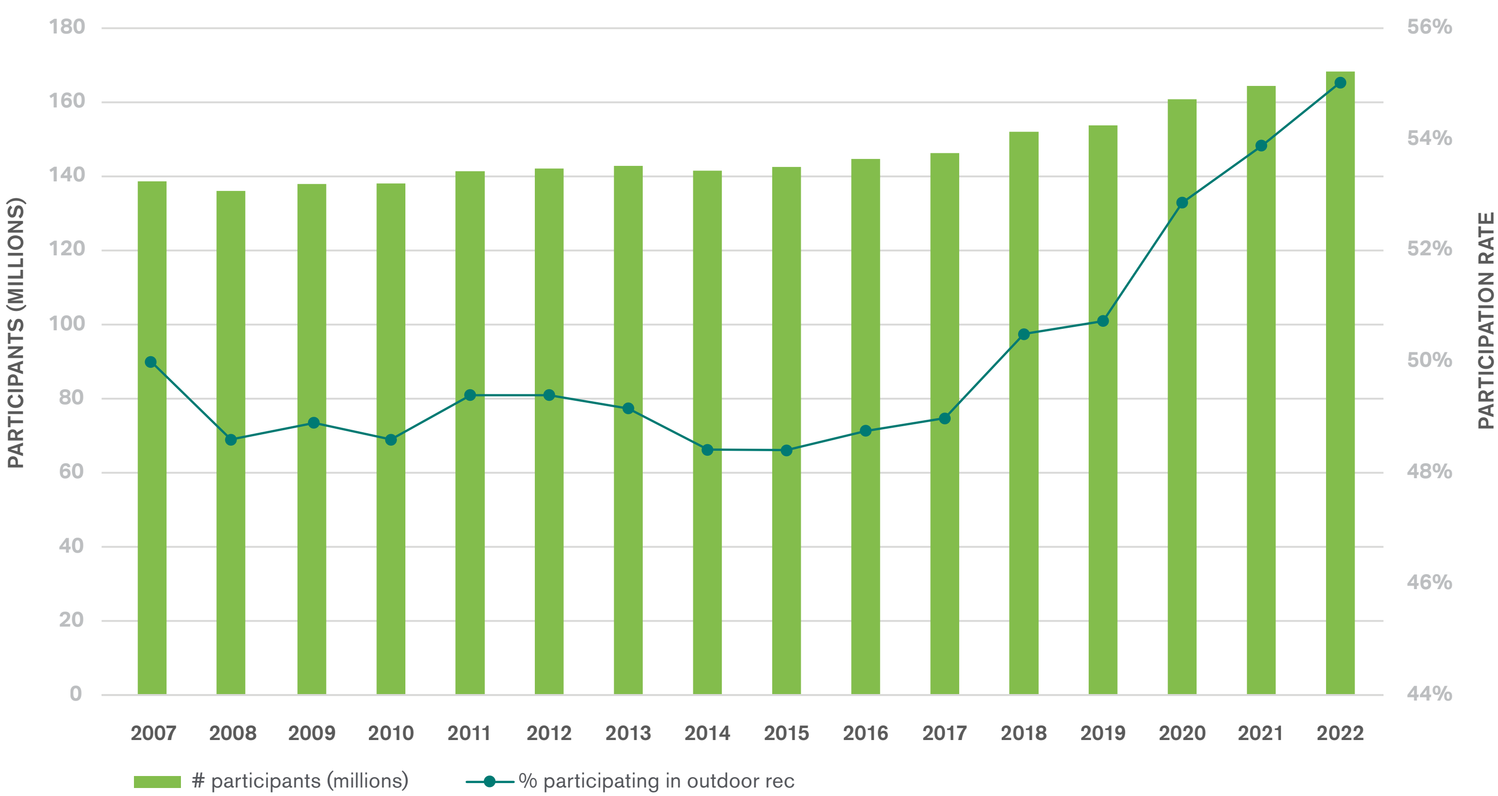
OUTDOOR RECREATION OVERALL DEMOGRAPHICS

Before exploring specific population segments, let's look at the number, race and ethnicity, gender, sexuality, region, age, income and education of American recreation enthusiasts overall.

NUMBER OF PARTICIPANTS

In 2022, 55% of Americans aged 6 and over participated at least once in recreation activity. The participant count hit a record high 168.1 million participants, and both the number of participants and the percentage of Americans who participated hit record highs in 2022.

OUTDOOR RECREATION PARTICIPATION COUNT AND RATE 2007 TO 2022



FREQUENCY OF PARTICIPATION

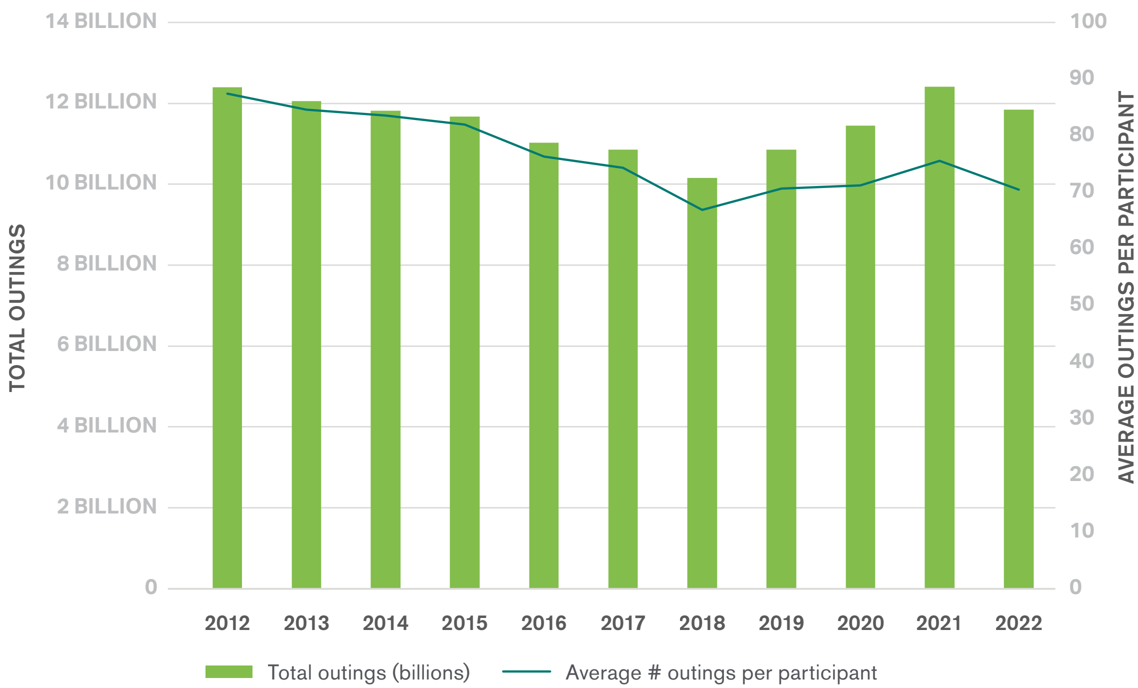
Frequent participants need gear, apparel, accessories, and experiences centered around outdoor recreation more often. Additionally, more frequent participants demand high-end products that perform well in challenging conditions in which quality means safety. Casual consumers listen to core hikers and skiers, skaters, paddlers, and climbers, especially if they have social media platform followings.

In 2022, the average number of outings per participant declined, and the percentage of outdoor participants who are core declined. (Core is defined as a person who participates in outdoor activities 51 times in a year or more.)

The frequency of participation and the percentage of core participants correlates with buying frequency—and, more loosely, as an indicator of high affinity for outdoor recreation. The frequency of participation has been in a long, slow decline for more than a decade.

- In 2012, the average number of outings per participant was 87.4. That statistic dropped to 70.4 outings in 2022.
- In 2007, 36% of the participant base participated frequently enough to be considered core participants, and the actual number of core participants (99.5 million) was higher than it was in 2022 (90.6 million), despite significant growth in the total participant base.

TOTAL OUTINGS AND AVERAGE OUTINGS PER PARTICIPANT, 2012 - 2022



FREQUENCY OF CHILDREN'S PARTICIPATION

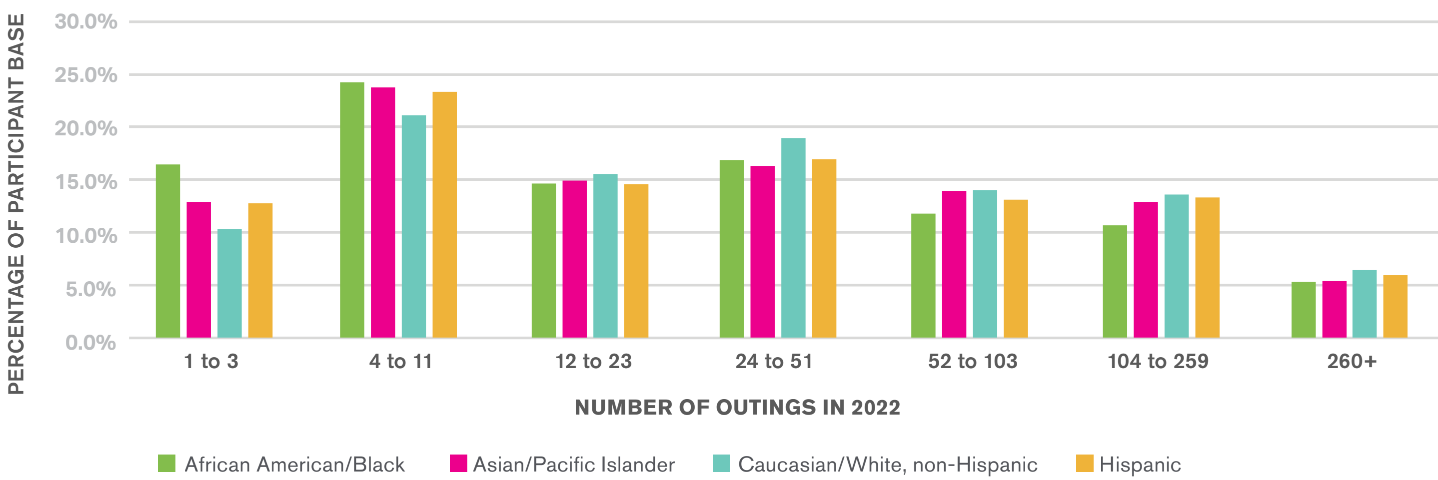
Not surprisingly, outings for families with children are declining along with outings for most groups. Outings for families with children (people 17 and younger) dropped from 85 outings in 2012 to 66 outings in 2022. At the same time, outings of adults in families without kids fell from 85 in 2012 to 71.8 outings in 2022.

Further insights and data regarding children's participation below.

FREQUENCY OF PARTICIPATION BY RACE/ETHNICITY

The average number of outings does not vary significantly between participants of different race/ethnicity groupings. Slightly more white participants participate more frequently than people of other races/ethnic groups.

DISTRIBUTION OF PARTICIPATION FREQUENCY BY RACE/ETHNICITY, 2022

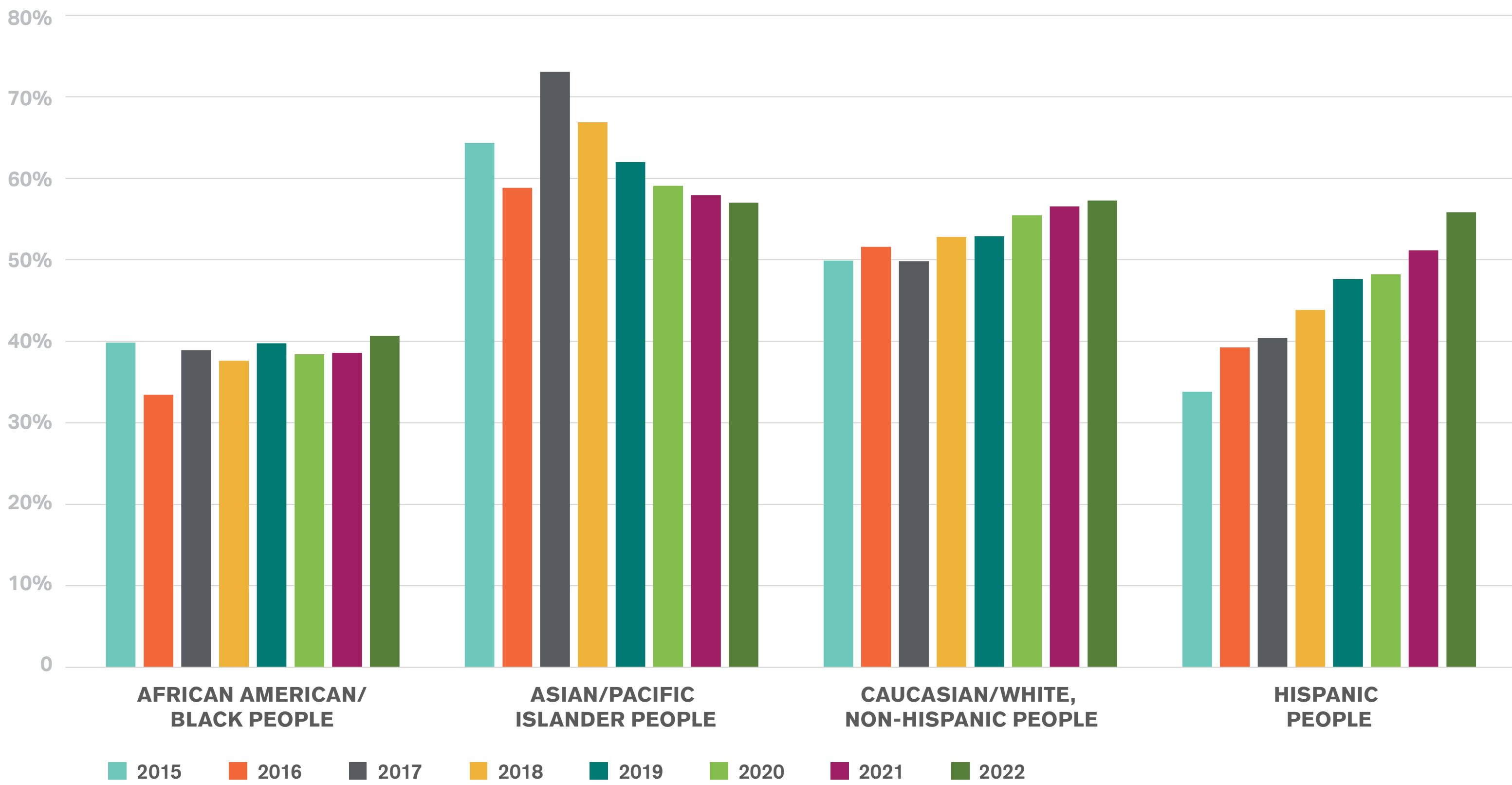


RACIAL/ETHNIC DIVERSITY

The outdoor participant base gained participants of color in 2022 and leaned into diversity and inclusion. The participation rates for Black participants, Hispanic participants, and white participants increased while the participation rate for Asian participants fell slightly.

- The participation rate for Black people increased more than 5% in 2022 to 40.7%. Black people continue to have the lowest overall participation rate in outdoor recreation, but that rate has increased in each of the past three years.
- The participation rate for Hispanic people jumped 9.2% in 2022 to 55.8%. At 5.5% over the past three years, the average annual growth rate for the Hispanic cohort is the highest of any group.
- More white people participated in outdoor recreation during 2022; 57.3% of all white people ages 6 and older in America participated in outdoor recreation, representing an increase of 1.3% over 2021.

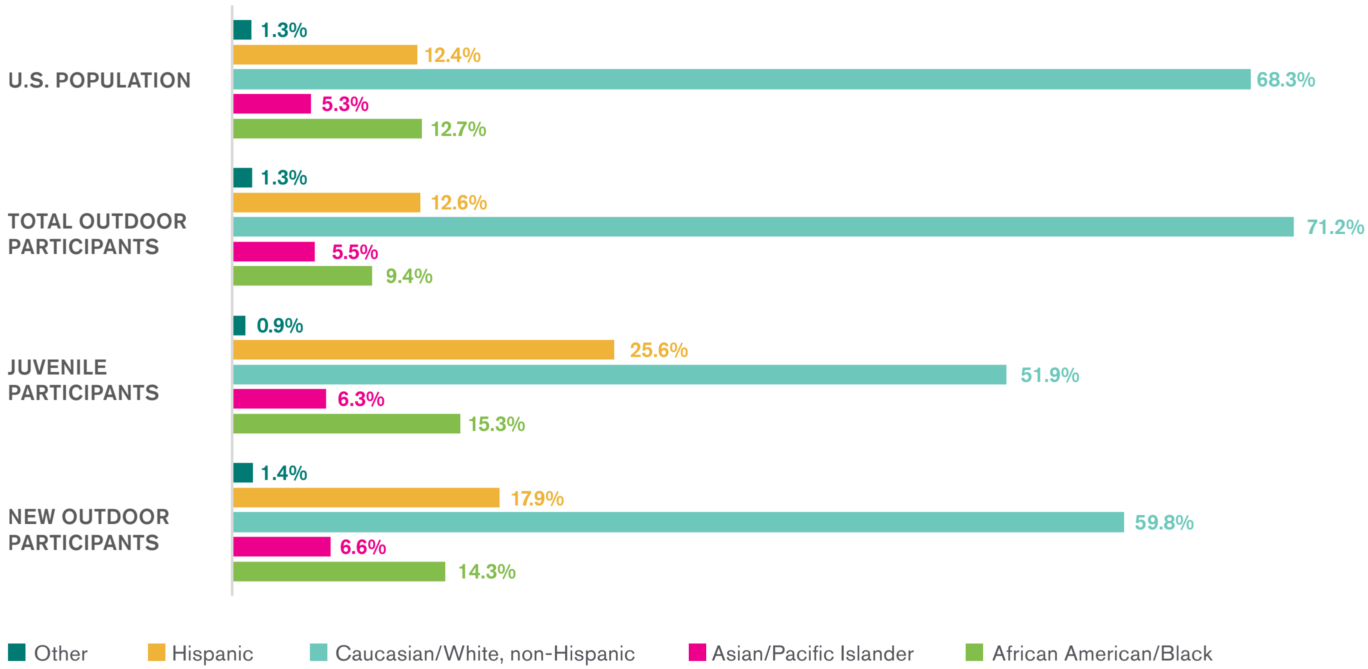
OUTDOOR RECREATION PARTICIPATION RATES BY RACE/ETHNICITY 2015 TO 2022



Although the outdoor industry has driven some growth in ethnic and racial diversity in the participant base, there are significant opportunities for improvement. The outdoor participation base is less diverse than the U.S. population overall.

White people make up 71% of the outdoor participant base, Hispanic people make up 12.6% of the base, Black people make up 9.4% of the base, and Asian people make up 5.5% of the base. In 2020, the U.S. population was made up of 68.3% white (not Hispanic) people, 12.7% Black people, 5.3% Asian people, and 12.4% Hispanic people. Diversity in the U.S. population is increasing quickly. Among U.S. residents 17 and under, 51.9% are white children, 15.3% are Black children, 25.6% are Hispanic children, and 6.3% are Asian children.

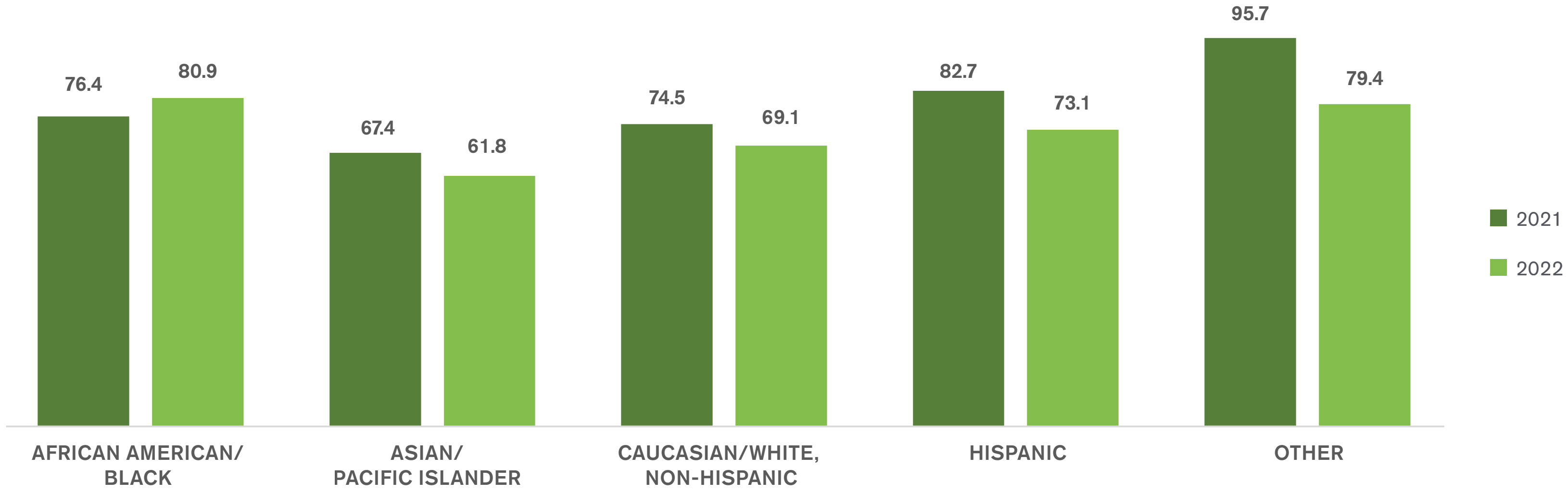
RACIAL/ETHIC DIVERSITY: US POPULATION VS. TOTAL, NEW, AND JUVENILE OUTDOOR PARTICIPANTS, 2022



The only racial/ethnic group with increased outings per participant in 2022 were Black people. Black participants engaged in the highest number of outings compared to people in other racial/ethnic groups in 2022, at 80.9 outings per Black participant. Although Asian people and Pacific Islanders have the highest overall participation rates, this racial/ethnic group has the lowest average outings per participant at 61.8%.

Census projections indicate that in 2060, white people will make up 44% of the population, 28% will be Hispanic people, 15% will be Black people, 9% will be Asian people, and 6% will be people with two or more ethnicities. Although the outdoor participant base isn't as diverse as the US population, diversity among children who participate and the diversity of new participants (people who participated for the first time in 2022) indicate that outdoor recreation is moving toward greater inclusivity.

AVERAGE OUTINGS BY RACIAL/ETHNIC GROUPS, 2021-2022



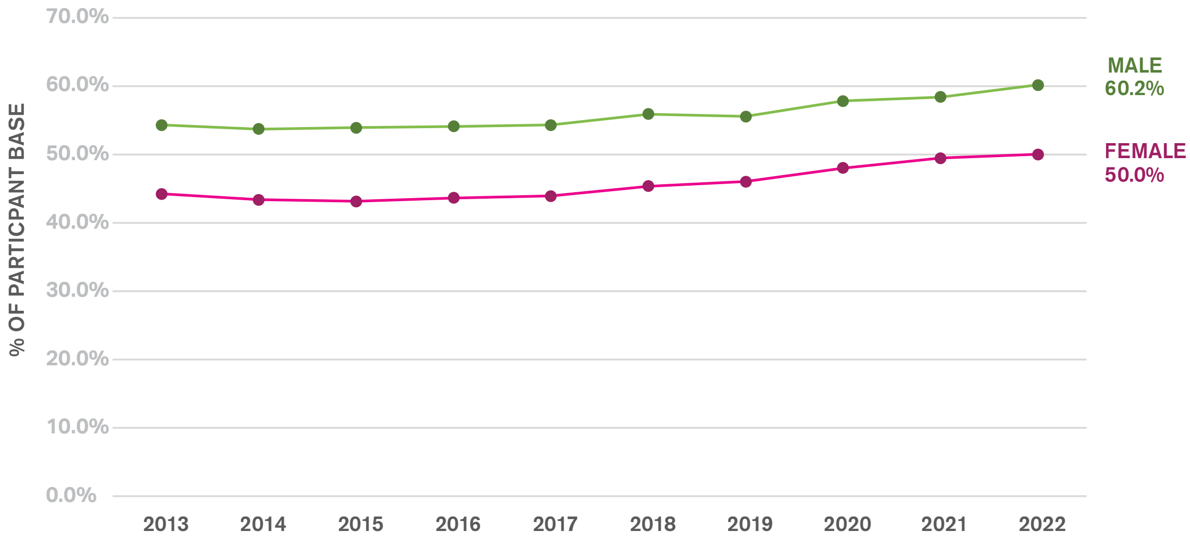
FAVORITE ACTIVITIES BY RACE/ETHNICITY

AFRICAN AMERICAN/ BLACK	ASIAN AMERICAN/ PACIFIC ISLANDER	CAUCASIAN/ WHITE	HISPANIC
Running, Jogging, & Trail Running **15.2%**	Hiking (Day) **23.6%**	Hiking (Day) **22.6%**	Running, Jogging, & Trail Running **20.2%**
Bicycling (Road/ Mountain/BMX) **13.0%**	Running, Jogging, & Trail Running **22.9%**	Fishing (Fly/Salt/Fresh) **19.3%**	Bicycling (Road/ Mountain/BMX) **17.2%**
Fishing (Fly/Salt/Fresh) **12.2%**	Bicycling (Road/ Mountain/BMX) **17.1%**	Camping (Car, Backyard, & RV) **19.0%**	Camping (Car, Backyard, & RV) **17.1%**
Camping (Car, Backyard, & RV) **9.1%**	Camping (Car, Backyard, & RV) **14.1%**	Bicycling (Road/ Mountain/BMX) **17.4%**	Hiking (Day) **17.0%**
Hiking (Day) **6.9%**	Fishing (Fly/Salt/Fresh) **10.7%**	Running, Jogging, & Trail Running **14.7%**	Fishing (Fly/Salt/Fresh) **14.7%**

GENDER

Both males and females had record-high participation rates in 2022. More than 60% of males and 50% of females ages 6 and older participated in outdoor recreation.

OUTDOOR RECREATION PARTICIPATION RATES BY GENDER 2013 TO 2022



The gender split in the outdoor recreation participation base was 54% male and 46% female overall. Female share of the participant base has increased incrementally compared with the percentage of males over the past decade, but not by much.

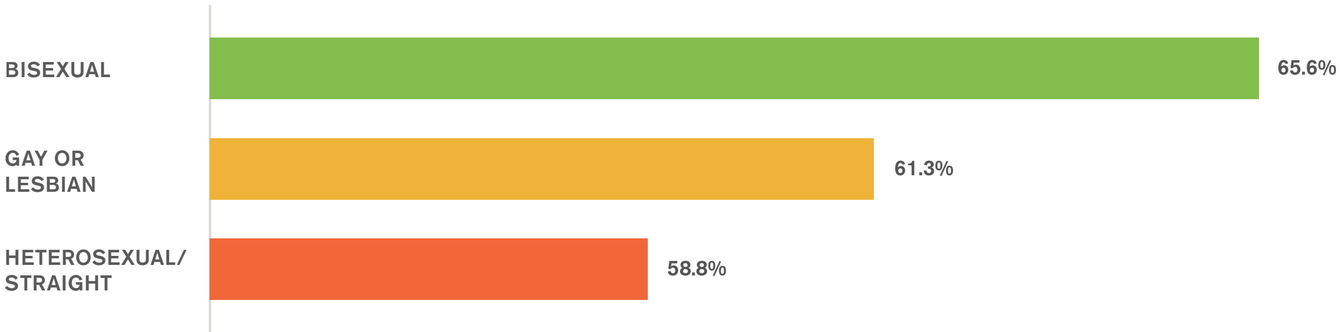
- In 2007, 43.5% of outdoor recreation participants were female.
- In 2017, 46% of participants were female; that percentage remained the same in 2022.

The ideal gender split that would indicate that males and females are participating equally in outdoor recreation would match the 50.5% female to 49.5% male ratio in the general US population.

LGBTQIA+ PARTICIPANT PROFILE

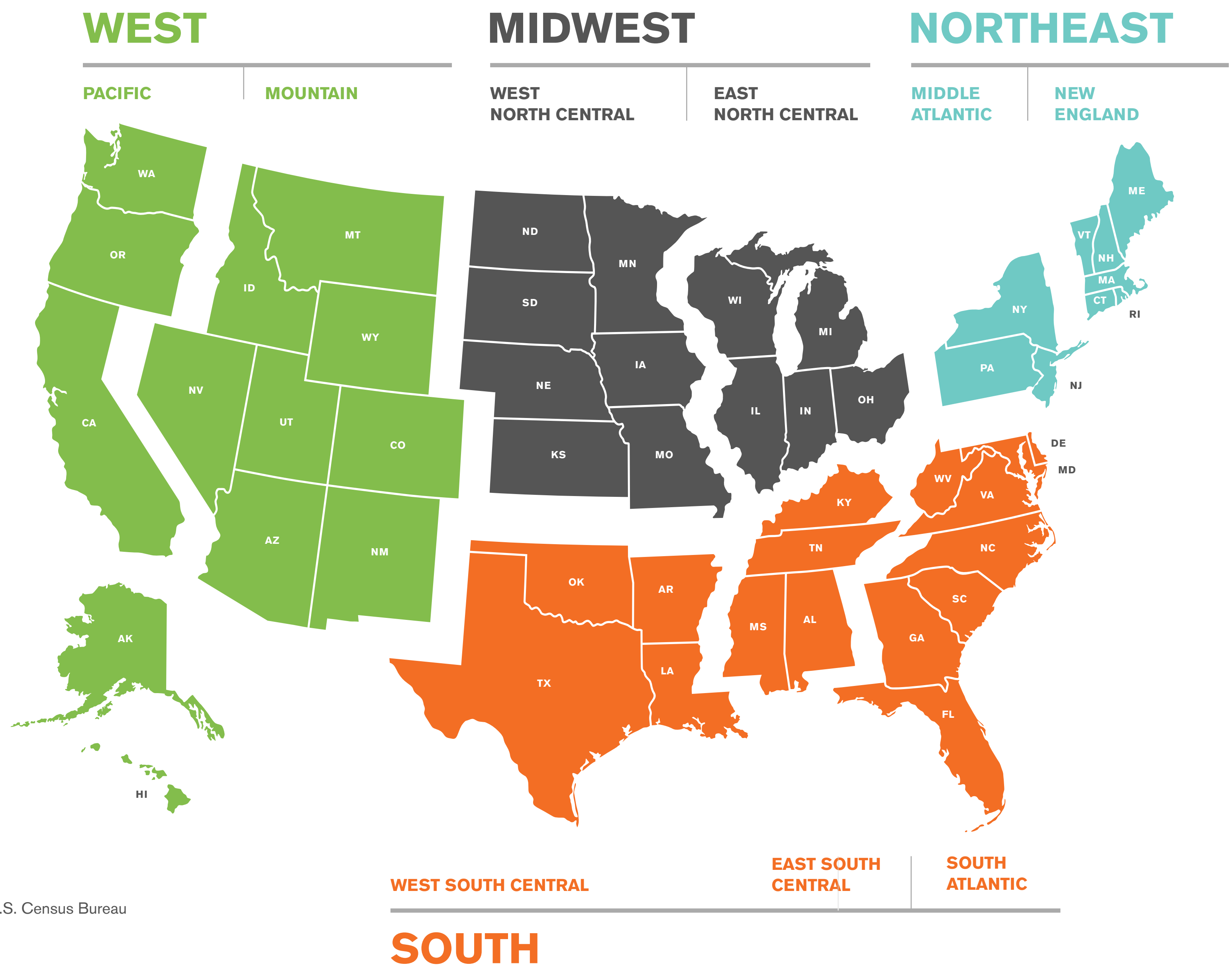
Slightly more than one in 10 outdoor participants identified as LGBTQIA+ in 2022. LGBTQIA+ people participate in outdoor recreation at higher rates than cisgender (people who retain the gender that was presumed for them at birth) heterosexual Americans. In 2022, participation rates by gender and sexual orientation in outdoor recreation reached record levels in all categories. In 2022, 60% of male people, 50% of female people, and 61% of LGBTQIA+ people of all genders participated in outdoor recreation. In 2022, more than 18 million outdoor recreation participants identified as LGBTQIA+ people, up from 15.8 million in 2021. Outdoor recreation participants who identify as bisexual had the highest participation rate at 65.6%, followed by gay and lesbian people at 61.3%, by male cisgender people at 60.2% and cisgender heterosexual women at 50%.

OUTDOOR RECREATION PARTICIPATION RATES BY SEXUAL ORIENTATION



REGION

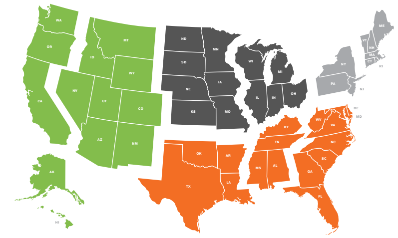
The U.S. Census Bureau divides the U.S. into nine district geographic regions (see map).



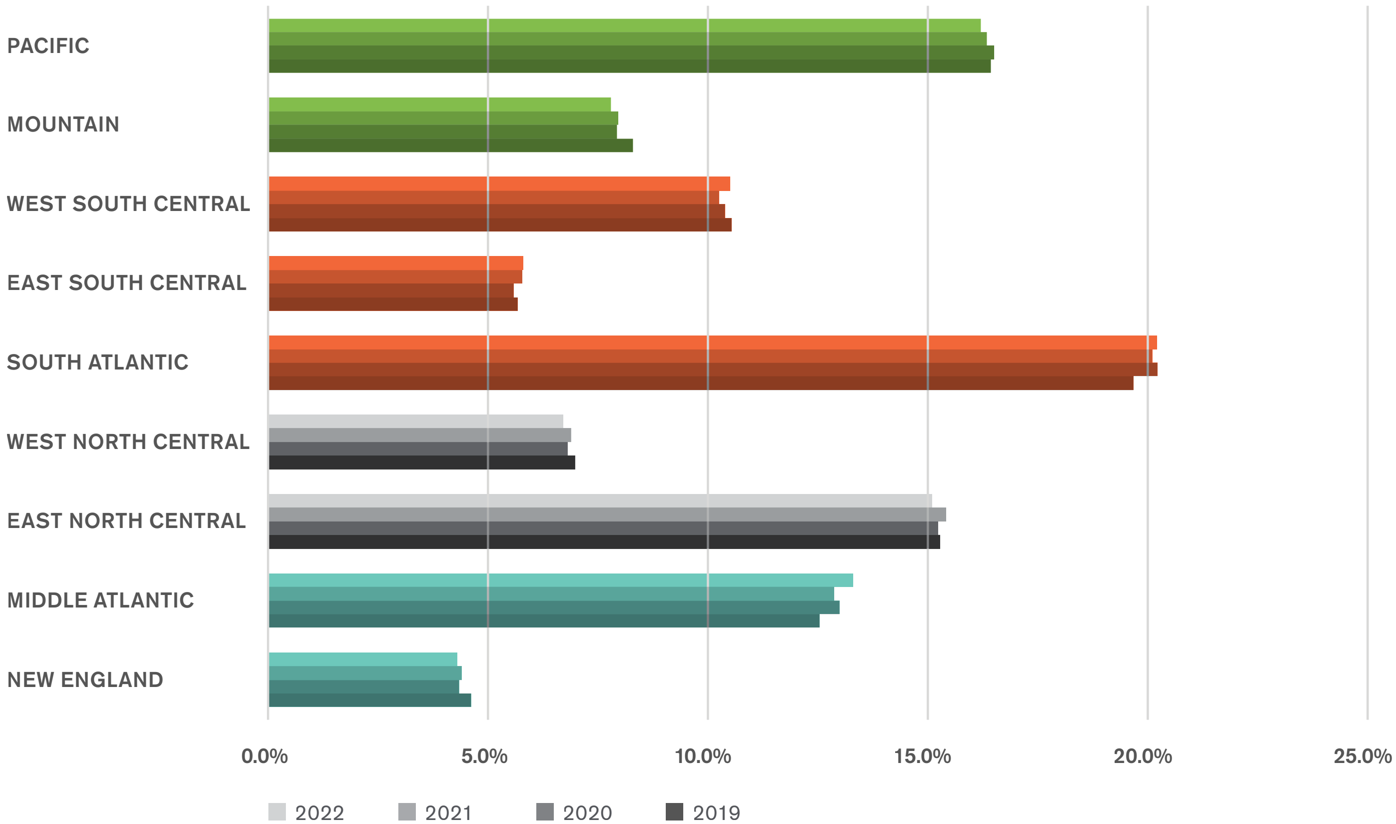
Credit: U.S. Census Bureau

NUMBER OF PARTICIPANTS BY REGION

The South Atlantic is the region with the highest number of outdoor participants, followed by the Pacific, and the East North Central region (which includes the Great Lakes).

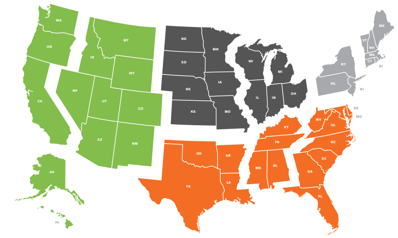


SHARE OF OUTDOOR PARTICIPANTS BY REGION, 2019 - 2022

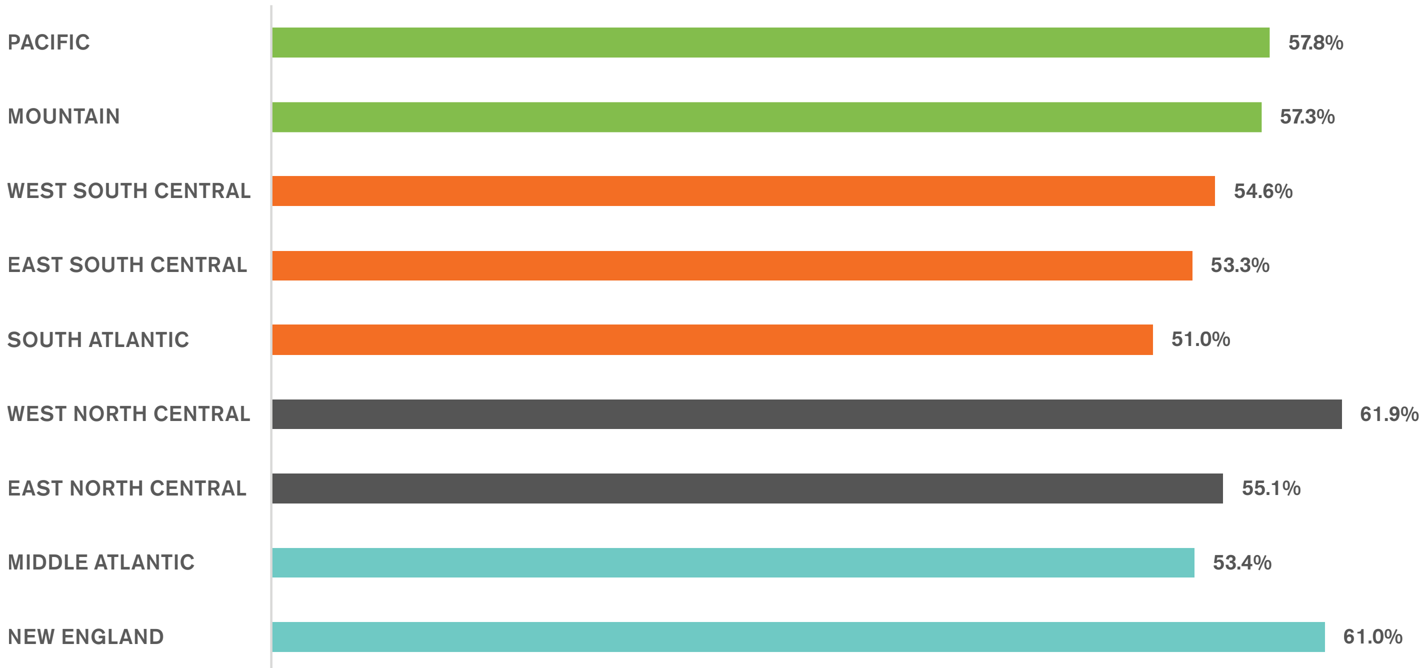


REGIONAL PARTICIPATION RATES

New England has the smallest share of outdoor participants but the second highest overall participation rate, just behind the West North Central region, which set the pace with 61.9% of residents participating in outdoor recreation.



OUTDOOR RECREATION PARTICIPATION RATES BY INCOME 2013 TO 2022



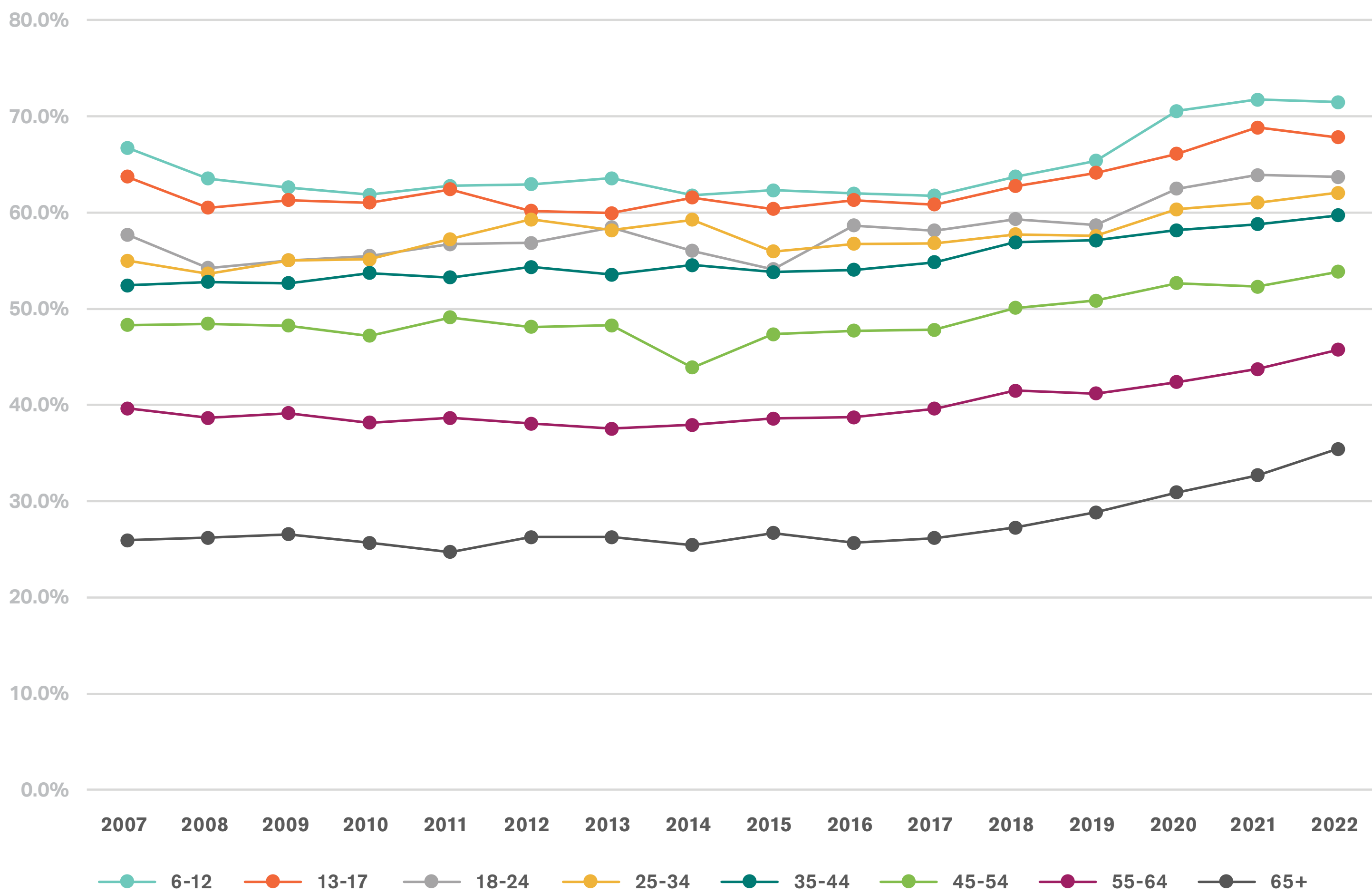
Participation rates were up in all but two regions. the West North Central region, which includes the Dakotas, Nebraska, Kansas, Missouri, Iowa, and Minnesota, had a flat participation rate of 61.9%, the highest in the country. The East South Central region (Tennessee, Kentucky, Alabama and Mississippi) had a 0.5% decline to 53.3%.

Participation was up 4.8% in the South Atlantic region (Delaware, Maryland, D.C., Virginia, North Carolina, South Carolina, Georgia, and Florida) to 51%, although it is still the lowest in the country. Participation in the Mountain region (Colorado, Utah, Wyoming, Montana, New Mexico, Arizona, Idaho, and Nevada) was up 3.7% to 57.3%, just above the national average of 55.1%.

AGE

Overall, 55% of Americans participate in outdoor recreation, and a greater share of the population in younger age groups participate. In 2022, the participation rate increased 2.1% overall. Higher participation rates in 2022 were not a pandemic-driven anomaly; the increase was part of a longer-term increase that started in 2015. Drilling deeper into the trend, we find some declines in younger age groups and accelerating growth in the participation rate of older age groups.

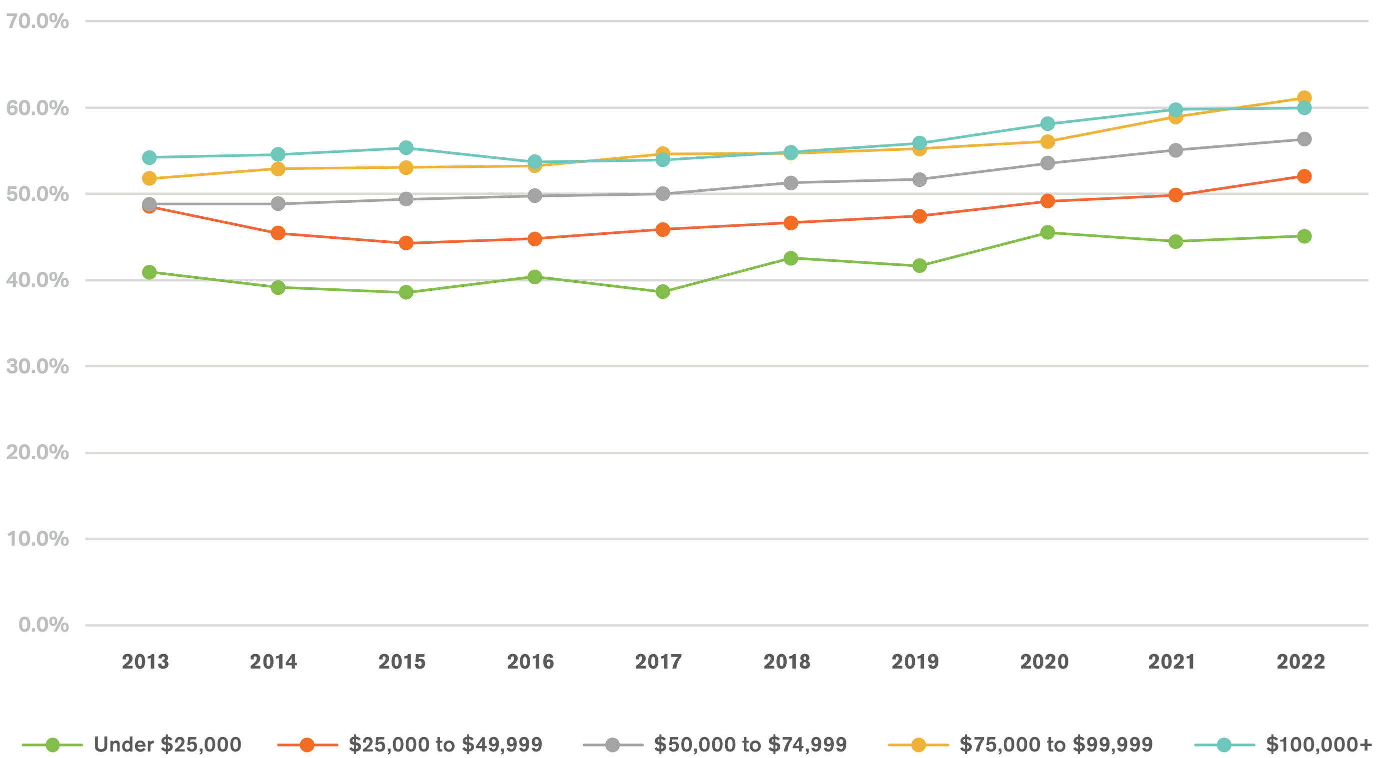
OUTDOOR RECREATION PARTICIPATION RATES BY AGE GROUP, 2013 TO 2022



INCOME

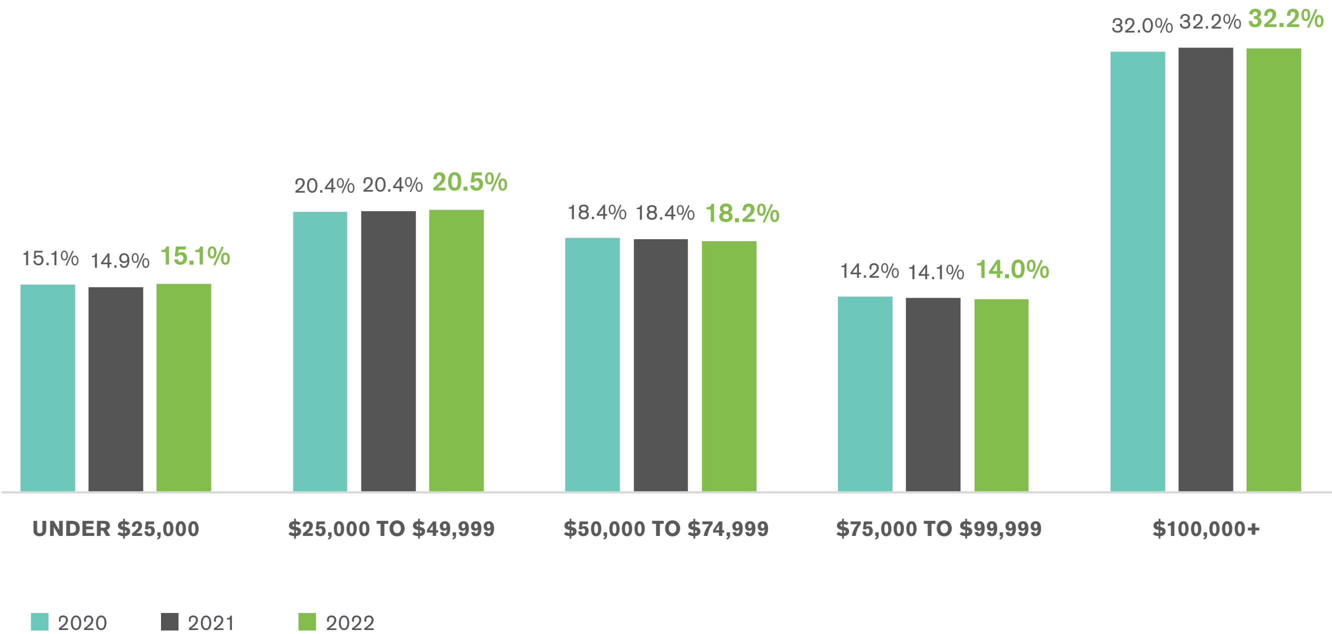
Participation rates are positively related to income levels. That means that a higher percentage of the members of higher income brackets participate in outdoor recreation as compared to people in lower income brackets. In 2022, 60% of people in households with income of $100k or more participated in outdoor recreation as compared to about 50% of people in households with less than $50k.

OUTDOOR RECREATION PARTICIPATION RATES BY INCOME 2013 TO 2022



The median household income in the US in 2022 was $78,813, while the median household income of outdoor participants was $69,675. The participant base could be a few billionaires short, but one in every three outdoor participants lives in a household with an annual income of $100k or more. Members of lower income brackets make up a smaller share of the outdoor recreation participant base.

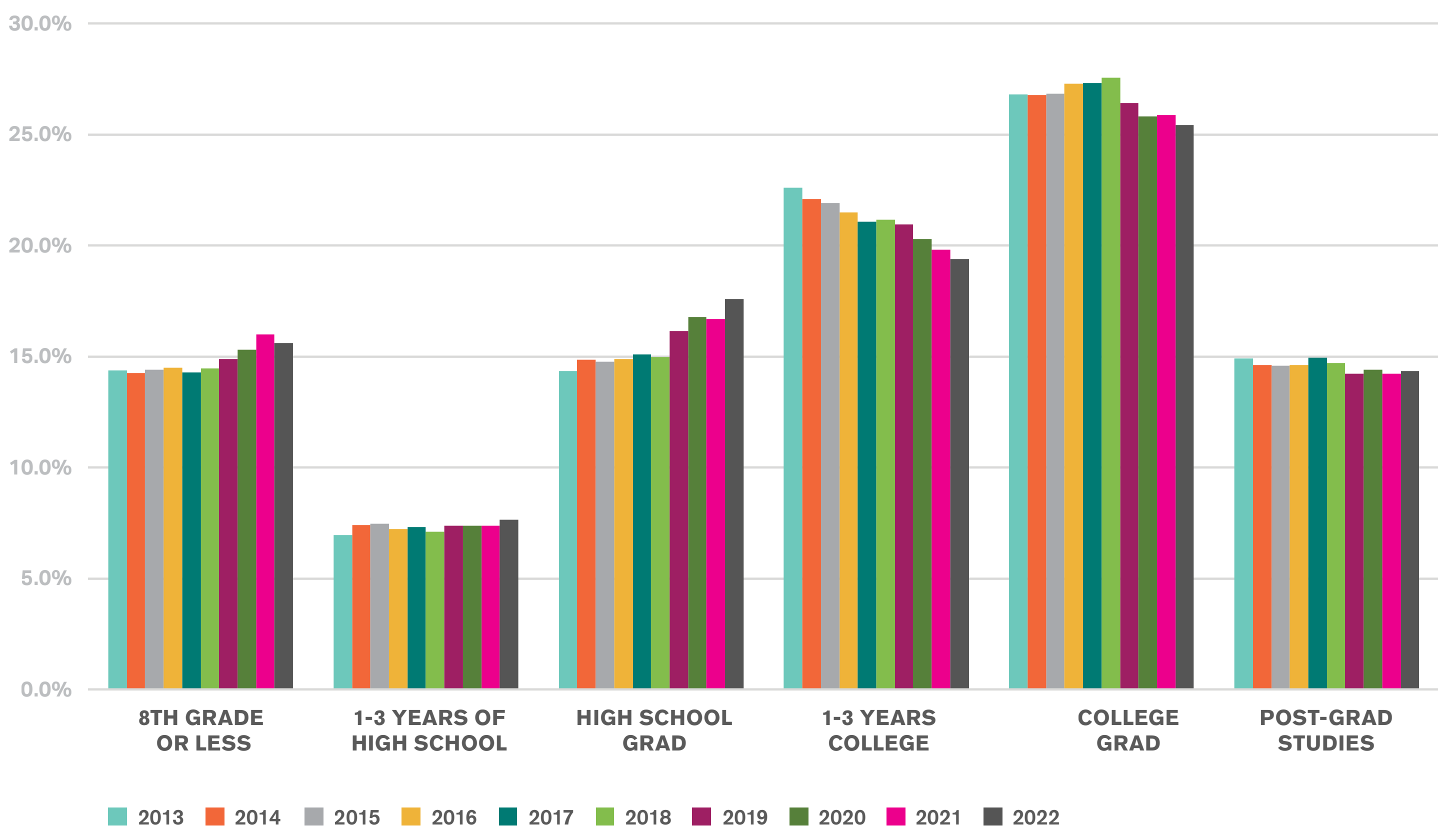
SHARE OF OUTDOOR RECREATION PARTICIPANT BASE BY INCOME LEVEL, 2022



EDUCATION

The share of participants by education level shifted toward the less educated during the pandemic. That was likely caused by the high number of new participants who began or returned to outdoor activity during the pandemic. Outdoor recreation continues to skew toward more highly educated adults. More than 40% of participants have at least a bachelor's degree.

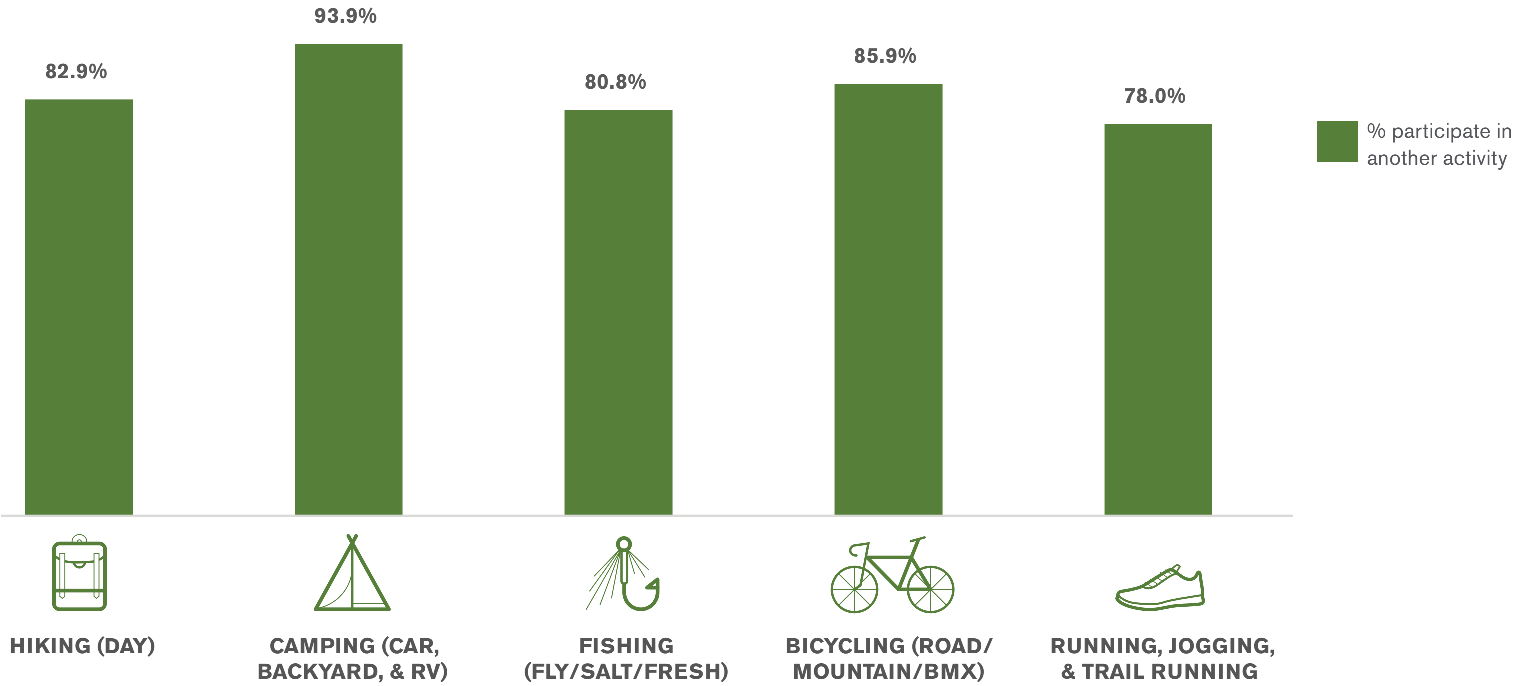
TOTAL PARTICIPANT COUNT BY FORMAL EDUCATION LEVEL



CROSSOVER PARTICIPATION

Most outdoor recreation participants engage in more than one outdoor activity. Crossover is the percentage of participants in a specific activity who participate in at least one other outdoor recreation activity. This data gives us a window into gateway activities where new participants begin their outdoor recreation journey. These activities include the usual suspects, such as bicycling, hiking, fishing, and camping.

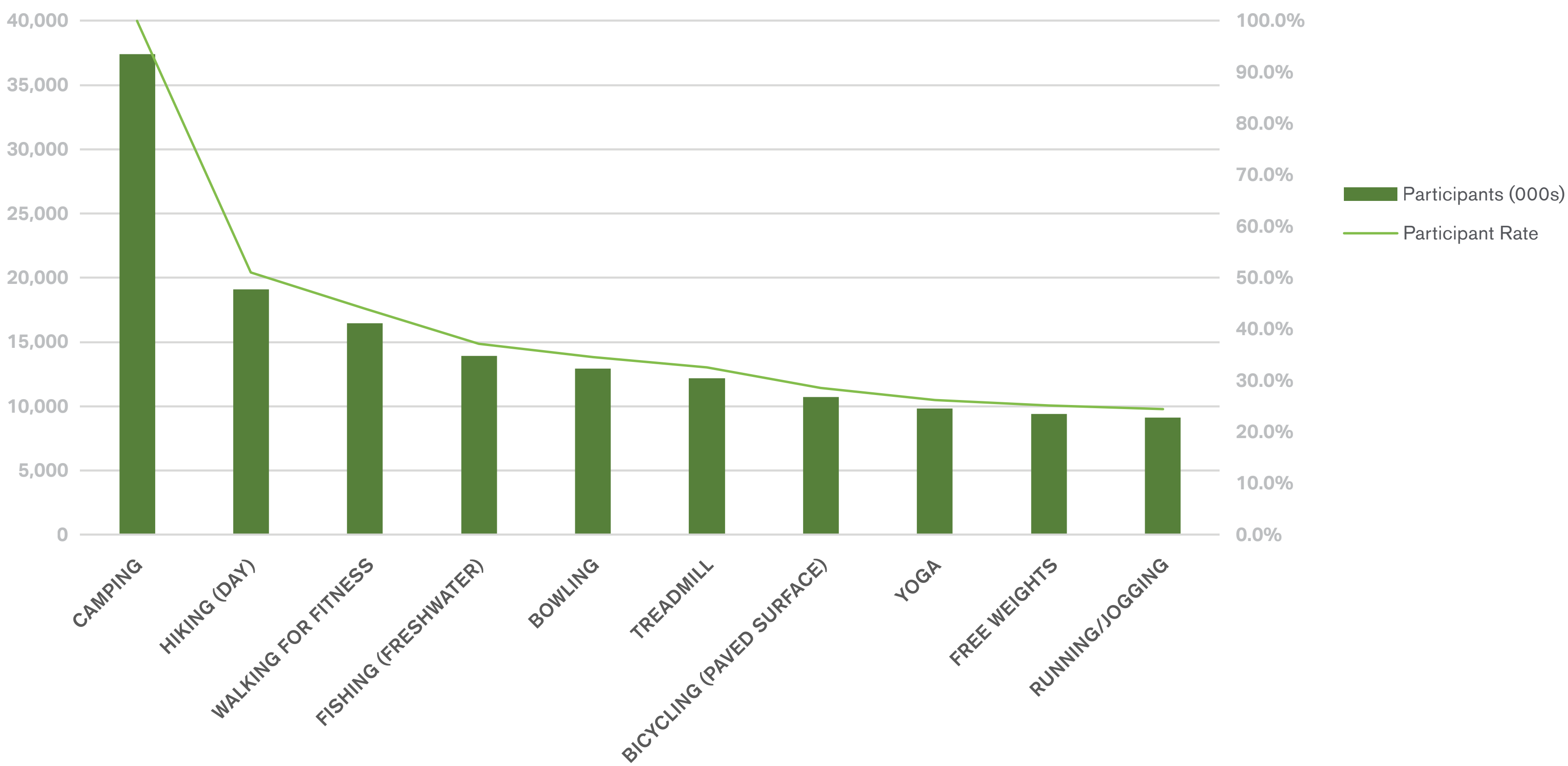
CROSSOVER IN OUTDOOR RECREATION ACTIVITY



Crossover activity helps us understand participant clusters that participate in hiking, camping, fishing, BMX bike, basketball or free weights. We know that many outdoor products are used across activities. This data can help businesses design products based on a group of activities that matches common crossover. (See the graph below for one example of crossover participation in people who camp.)

A company can use crossover data to design and market to consumers who will likely use a product while engaging in all those activities. Brands that have this information can more effectively market cross-functional products. This data, which shows cross participation over 116 other physical activities including team sports, individual activities, and all outdoor categories from adventure racing to wakeboarding, is available across 47 outdoor recreation categories. Please contact OIA for member access to this detailed data, which is available 24/7/365 on demand.

CAMPING CROSSOVER ACTIVITIES



Activities that are not specifically defined as outdoor activities may lead to crossover participation with outdoor activities. Walking for fitness is an activity we track, but is not included in the total of outdoor participants because a significant percentage of this activity occurs indoors.

Walking is the most popular physical activity overall; 37% of US residents ages six and older participated in this activity in 2022. It is the #1 crossover activity with trail running, day hiking, road running/jogging, birding, fishing, wildlife viewing and many others. The data show that the most popular thing to do outdoors is simply walking, and that is often the path into more outdoor activity. This data indicates that outdoor recreation participants arrived in the outdoor market by walking and that is a ready gateway for new participants.

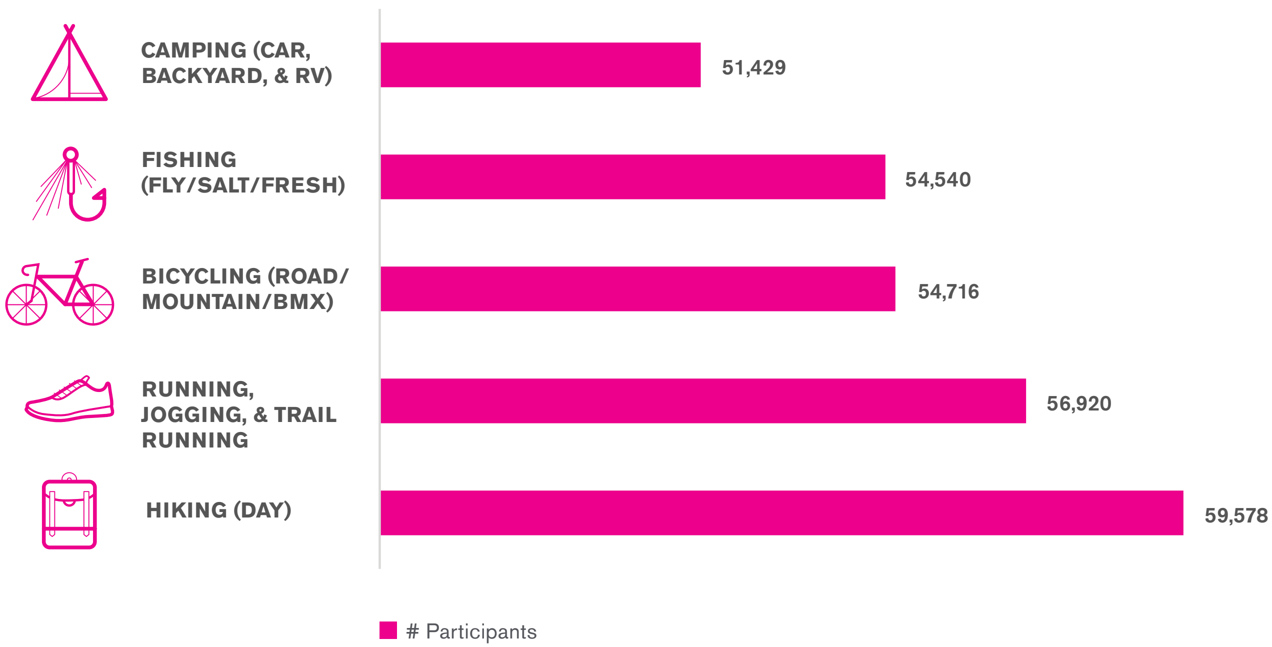
HOTTEST OUTDOOR RECREATION ACTIVITY CATEGORIES

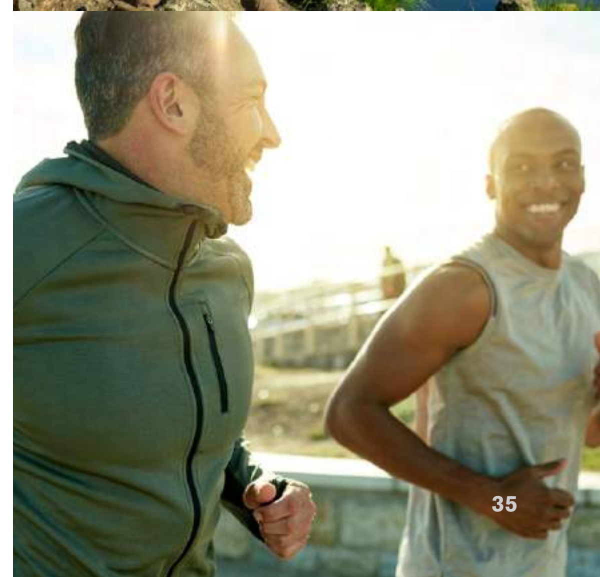
Outdoor recreation consists of 51 different activity categories ranging from adventure racing to wakeboarding. Here, we'll examine categories that gained the most participants by number, which activities were most attractive to new entrants, and which are consumed most frequently.

MOST PARTICIPANT GAINS (NEW ENTRANTS)

The categories that gained the most participants in 2022 are camping, birding, freshwater fishing, hiking, bicycling on paved surfaces, and trail running. There were 5.8 million new entrants into those five categories in 2022. That includes people who were new to outdoor recreation, returning to outdoor recreation after a lapse in participation, and current participants who were active in other outdoor categories before entering one of these.

MOST POPULAR OUTDOOR RECREATION ACTIVITIES, 2022

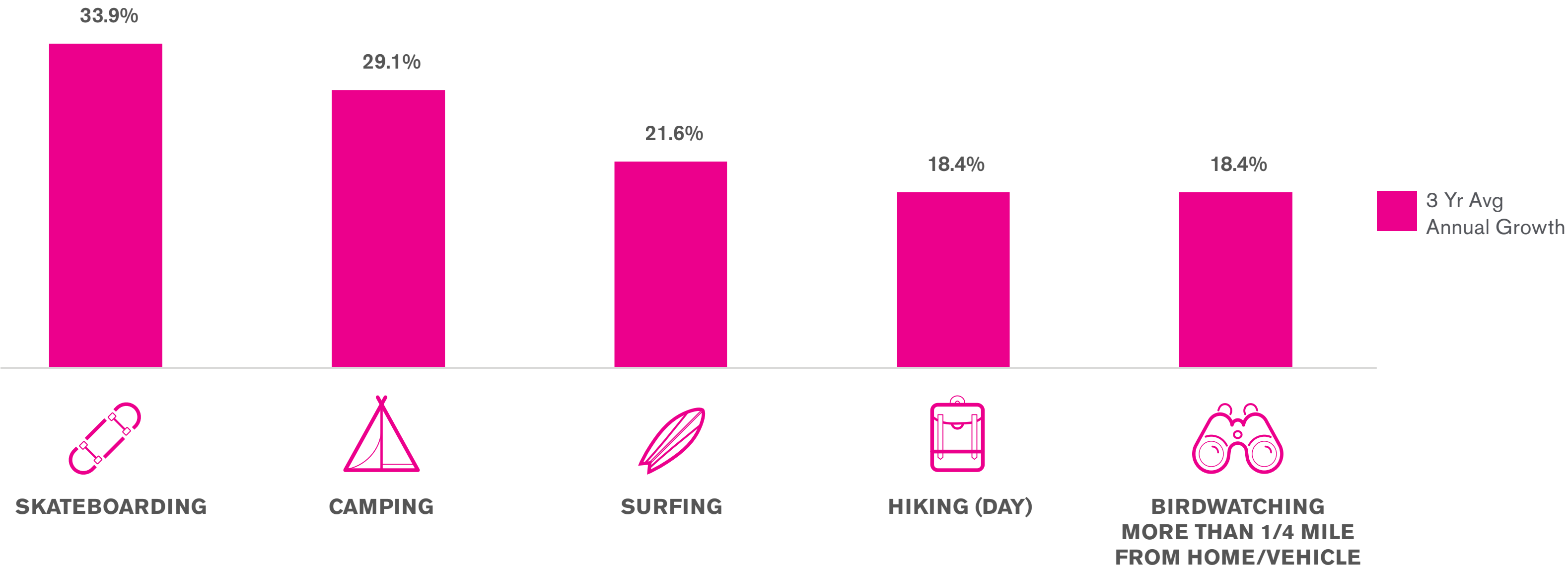




MOST GROWTH (HIGHEST RATE)

The categories with the highest average annual growth rates in outdoor recreation for the three-year between 2020 and 2022 include skateboarding, camping, surfing, hiking, and birding.

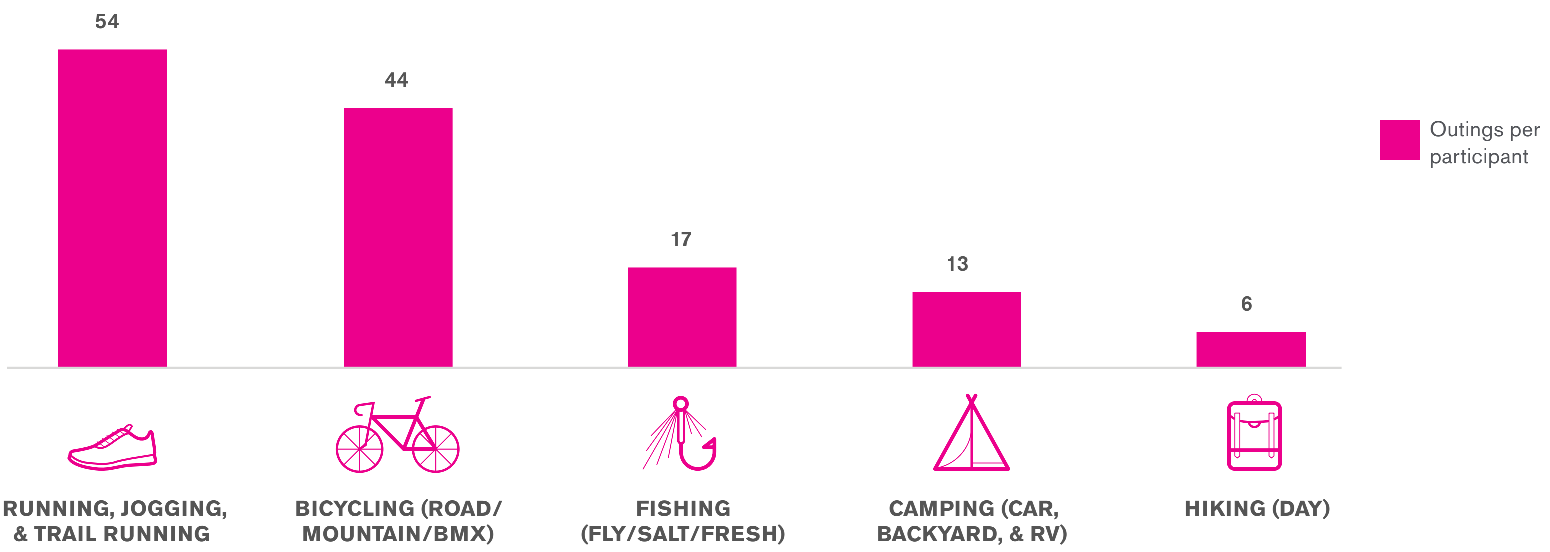
OUTDOOR ACTIVITIES WITH HIGHEST AVERAGE ANNUAL GROWTH OVER THE PAST THREE YEARS



MOST RECURRING (HIGHEST FREQUENCY)

The categories that generate the highest number of outings in outdoor recreation are running, bicycling, fishing, camping, and hiking. Having high numbers of participants who participate frequently means that these activities drive many sales in the outdoor market.

OUTDOOR ACTIVITIES WITH THE HIGHEST AVERAGE OUTINGS PER PARTICIPANT, 2022

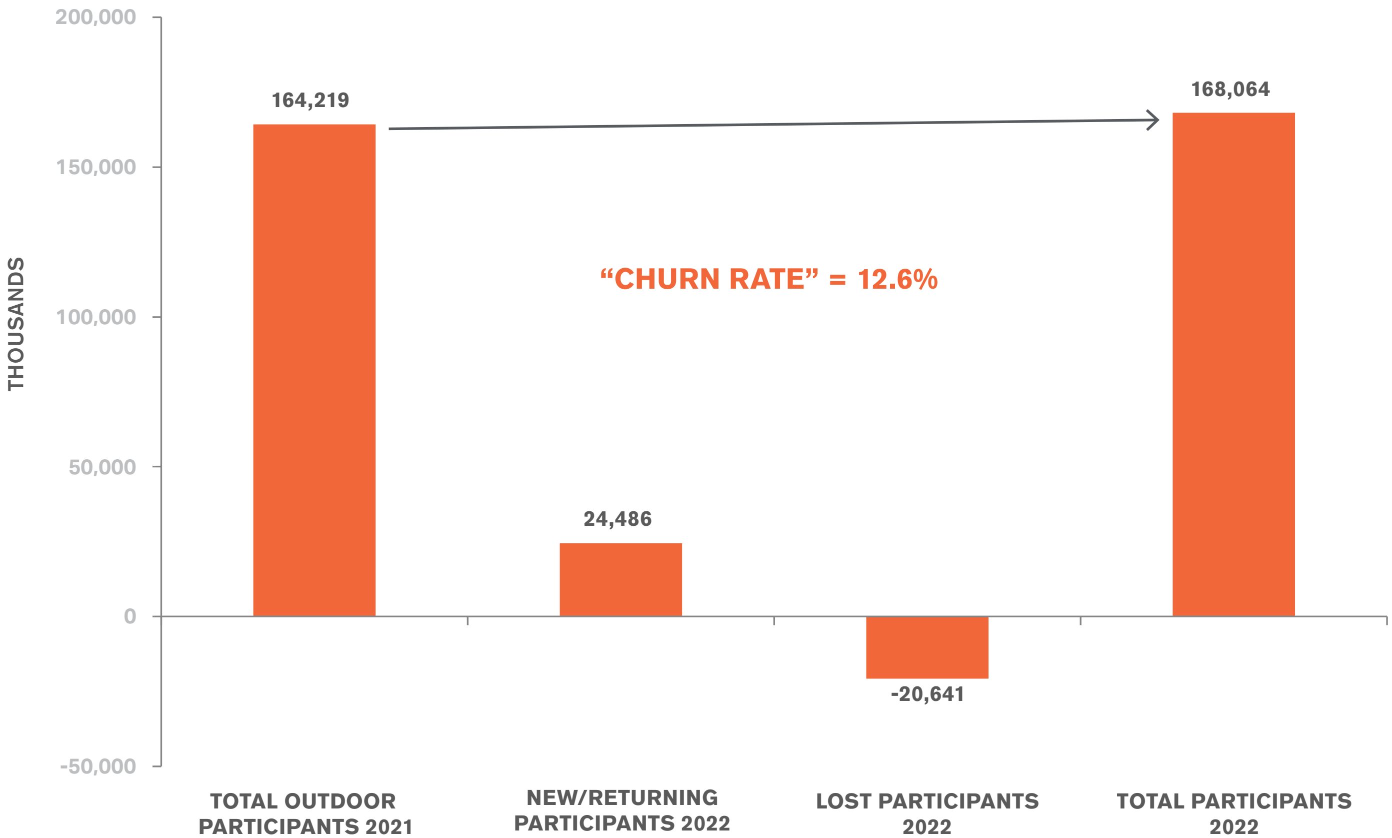


The most popular indoor activities, including walking for fitness, treadmill, free weights, yoga and stationary cycling, had a combined annual growth rate just below -1% in 2022. Although these categories are not technically part of the outdoor market, crossover participation between outdoor and indoor activity is high. For example, 43% of the 115 million Americans who walk for fitness, and 25% of people who bowl, also participate in outdoor recreation.

OUTDOOR RECREATION PARTICIPATION CHURN

The churn rate, also known as the rate of attrition or participant churn, is the rate at which people stop participating in outdoor recreation activities. The churn rate is expressed as the percentage of outdoor recreation participants who stopped participating during the year.

NEW/RETURNING AND LOST OUTDOOR PARTICIPANTS 2021 TO 2022



In 2022:

- 7 million people participated in outdoor recreation for the first time.
- 17.5 million participants returned to outdoor recreation after a hiatus of two years or longer.
- 20.6 million people stopped participating in outdoor recreation.
- There was a net positive increase of 3.8 million participants.

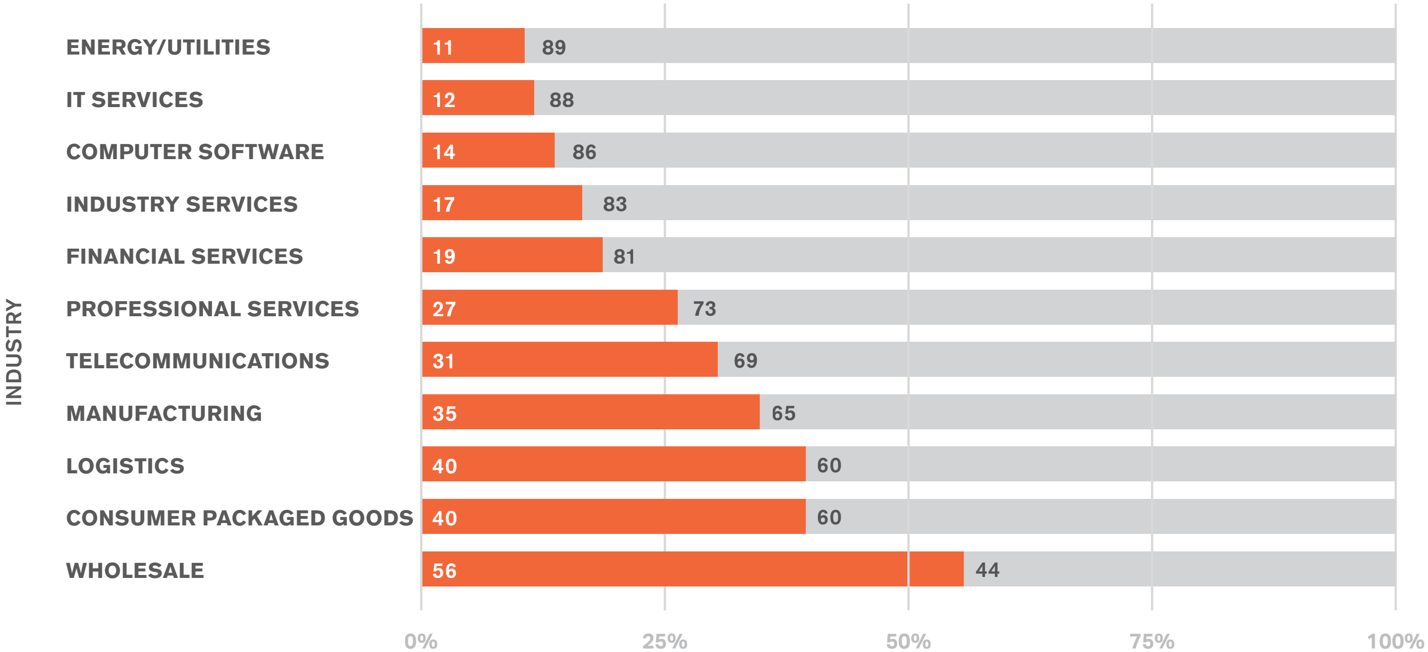
The largest net gain occurred in 2020, with a 7 million net increase in participants.

Outdoor recreation has only experienced net declines in two of the past 15 years; there was a decline of 2.5 million participants in 2008 and a 1.2 million participant decline in 2014.

NEW, RETURNING, OR LOST PARTICIPANTS AND NET GAIN/LOSS, 2008 TO 2022

Although the churn rate increased in 2022, outdoor recreation saw 3.8 million more new participants enter outdoor recreation than it lost. The 2022 churn rate in outdoor recreation was 12.6%, slightly higher than the 10.5% churn rate reported in 2021. (For comparison, the wholesale industry has the highest churn rate at 56%, and the energy/utilities the lowest at 11%.)

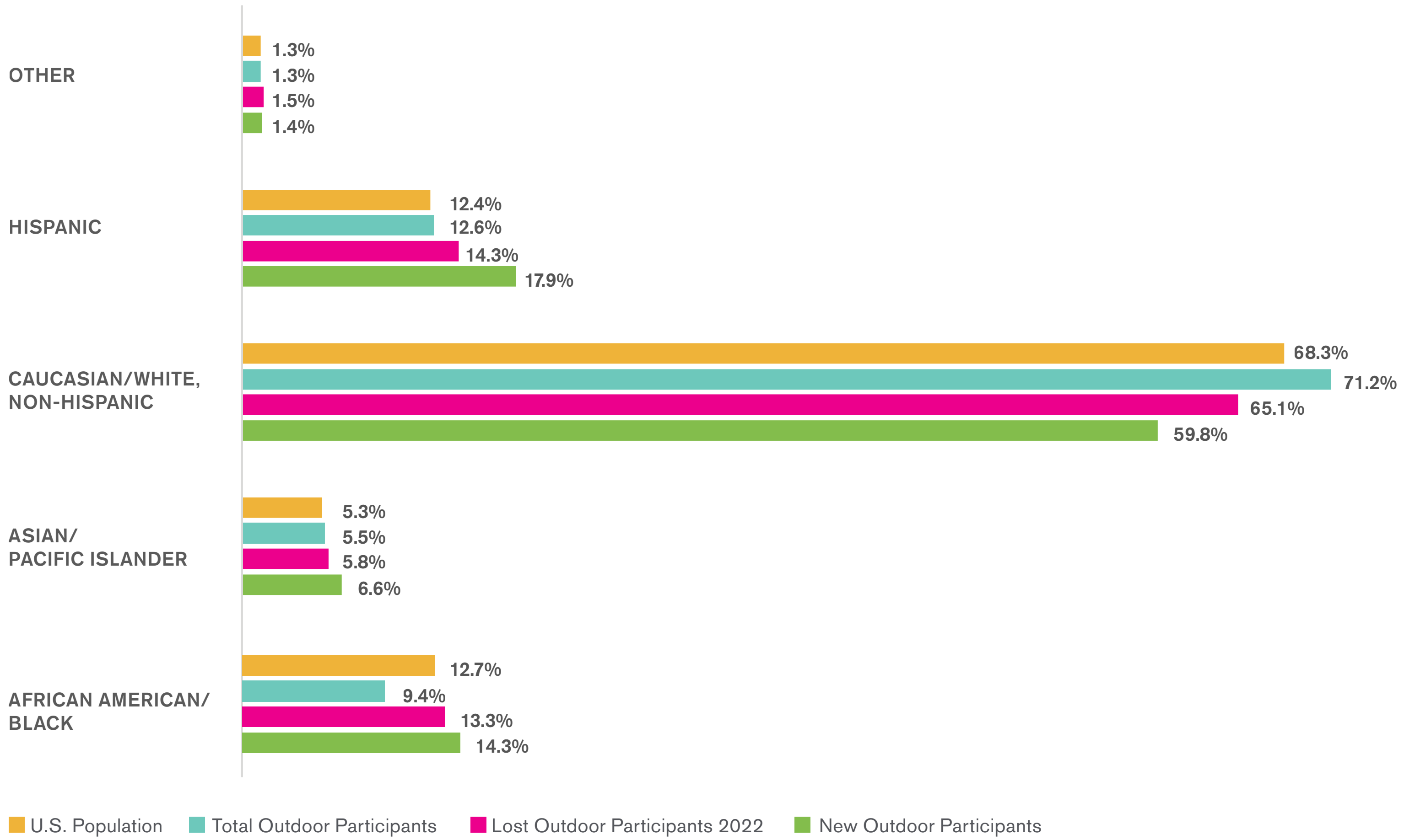
NEW, RETURNING, OR LOST PARTICIPANTS AND NET GAIN/LOSS, 2008 TO 2022



Source: Customer Gauge, What's the Average Churn Rate by Industry, Sabrina Tessitore, March 7, 2023

The people who departed outdoor recreation in 2022 were less racially/ethnically diverse than the group of new participants entering the market. More than 65% of lost participants were white people, compared to nearly 59.8% of new participants.

RACIAL/ETHNIC GROUPS AS A PERCENTAGE OF U.S. POPULATION, TOTAL OUTDOOR RECREATION PARTICIPANTS, NEW PARTICIPANTS, AND LOST PARTICIPANTS

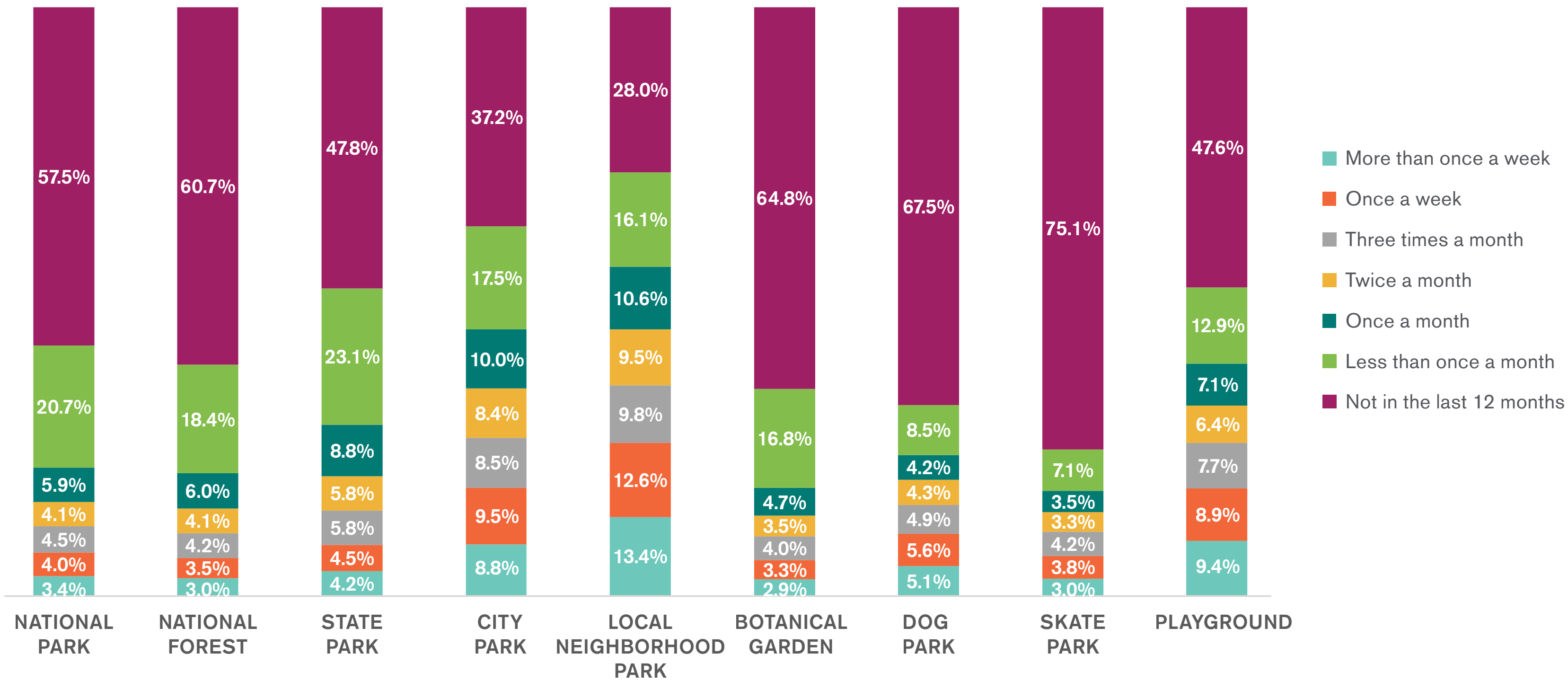


LOCATION

WHERE OUTDOOR RECREATION IS HAPPENING

More Americans visited public outdoor venues (including local parks and playgrounds, national parks, skate parks, and dog parks) in 2022. The most popular public places for Americans to participate in outdoor recreation were local parks, city parks, and playgrounds. Nearly 70% of outdoor recreation participants visited a local (if not urban) park, city park, or local playground in 2022, and most visited frequently. In fact, one quarter of those that visited local parks and playgrounds were there at least once per week.

HOW OFTEN DO PARTICIPANTS VISIT PUBLIC OUTDOOR VENUES?



National parks and forests remain very popular in 2022. More than 40% of outdoor participants (67.2 million) visited a national park or national forest in 2022. Most visitors reported visiting a park five to eight times in 2022. This jibes with National Park Service reporting that 312 million attendees visited America's national parks in 2022 and that total park attendees were up 5% in 2022.

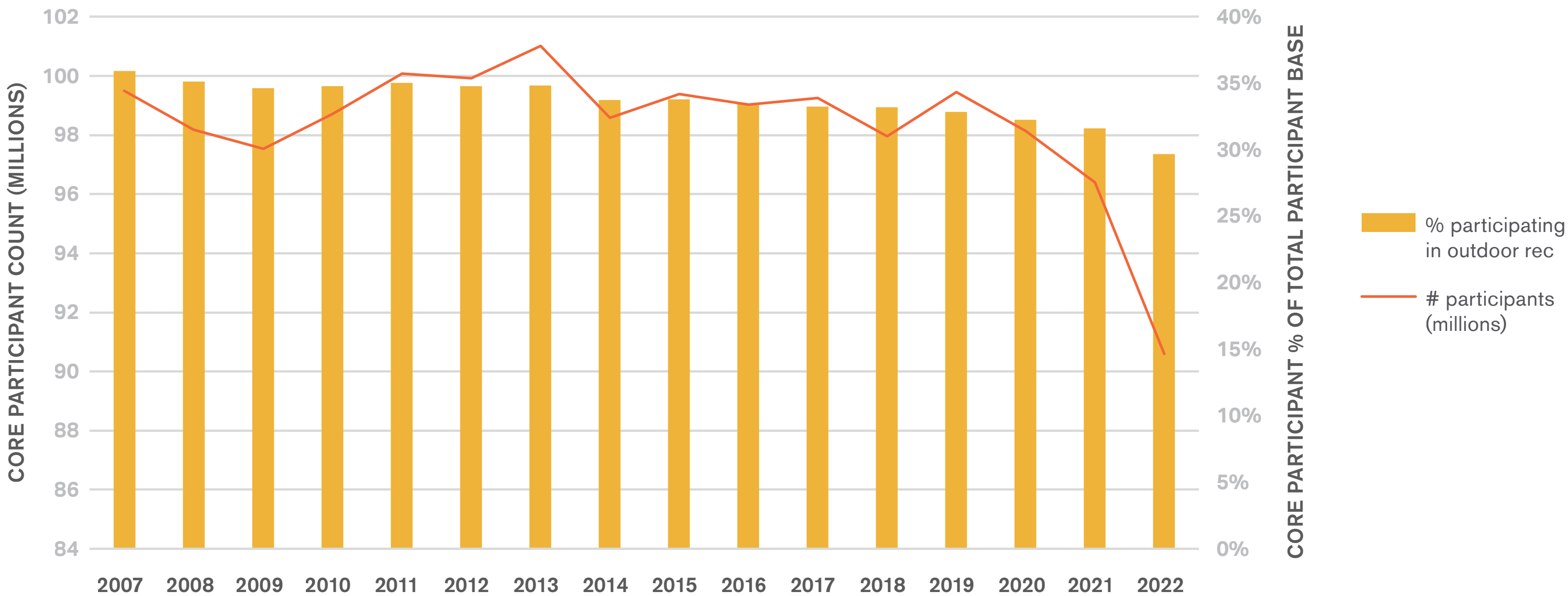
CORE OUTDOOR ENTHUSIASTS:
MOST FREQUENT PARTICIPANTS

Outdoor recreation enthusiasts who participate 51 times a year or more in outdoor activities are considered core participants. This group of participants is extremely important to the market as frequent buyers, as role models in various activity categories, and as reliable supporters in industry initiatives (like efforts to mitigate the impacts climate change and protect public lands for future generations).

Core participants are becoming scarcer. Academic literature examining the relationship between outdoor activity and connection to nature finds that more activity correlates with several measures of connection with nature, including pro-environmental and pro-conservation behaviors ("A Measure of Nature Connectedness for Children and Adults: Validation, Performance, and Insights," by Miles Richardson, Anne Hunt, Joe Hinds, Rachel Bragg, Dean Fido, Dominic Petronzi, Lea Barbett, Theodore Clitherow, and Matthew White, June 2019.)

In 2007, 36% of the participant base participated frequently enough to be considered core, and the actual number of core participants (90.5 million) was lower than it was in 2022 (90.6 million) despite significant growth in the total participant base. In 2022, as the average number of outings per participant declined, the number of and percentage of core participants declined. This is also an effect of millions of new and infrequent participants entering the outdoor recreation market over the past three years.

TOTAL CORE PARTICIPANTS, 2007 TO 2022

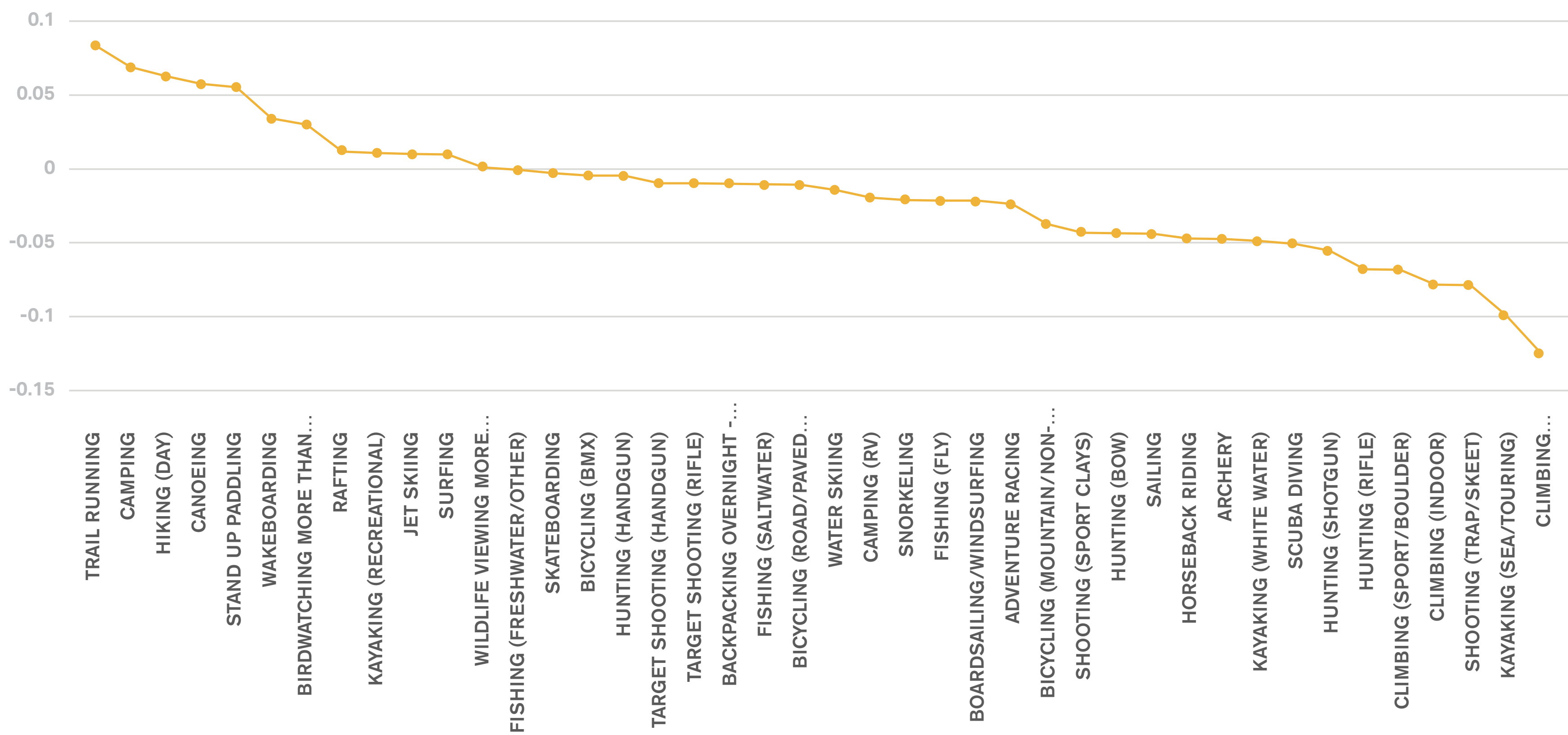


Let's examine the most popular activities, participation rates, racial and ethnic diversity, and income of core participants.

CORE ACTIVITIES AND PARTICIPATION RATES

In 2022, 24% of outdoor activities we track (we do not track snow sports frequency) had increases in core participation, including trail running, camping, hiking, canoeing and stand-up paddling. Climbing, trap and skeet shooting, and sea kayaking had the most notable declines in core participation.

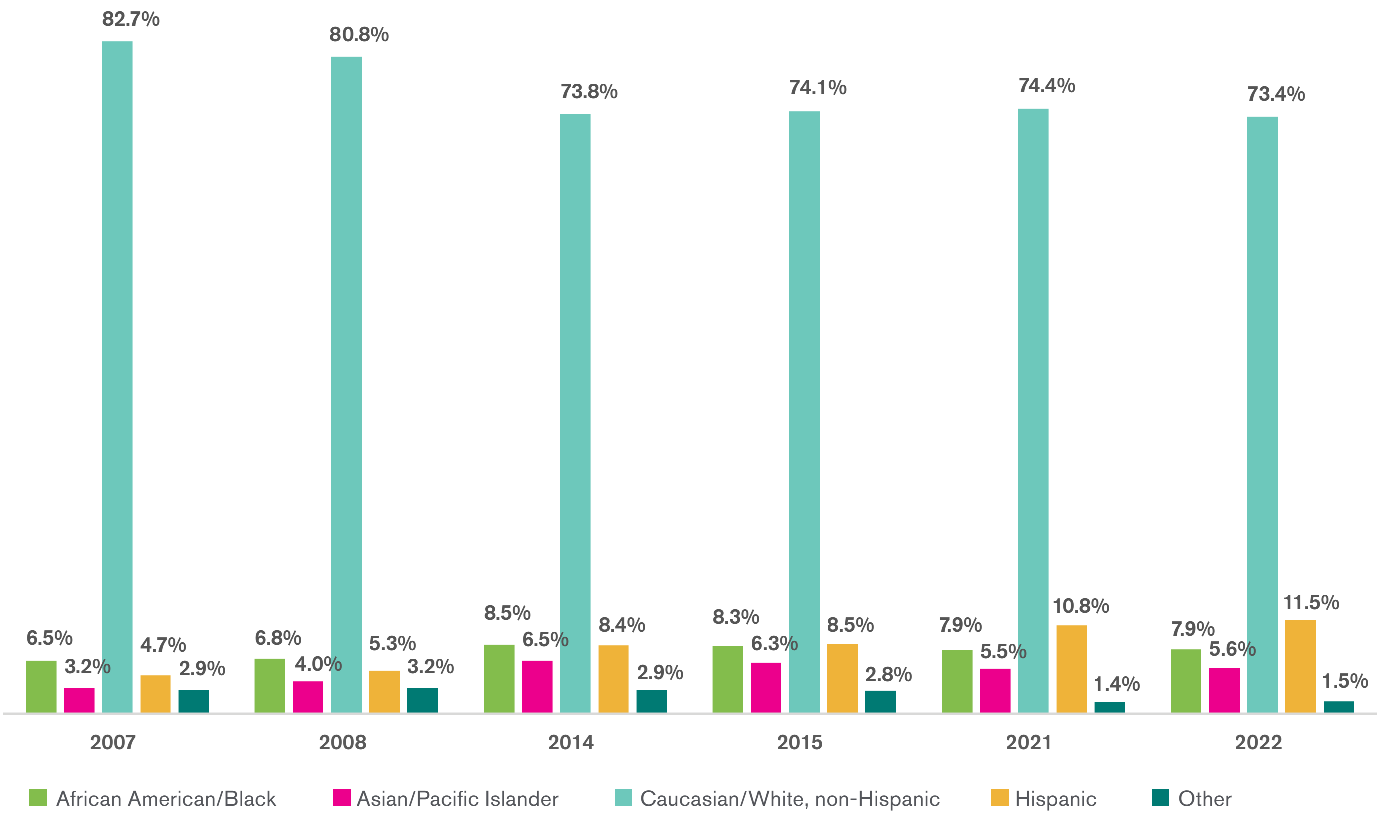
ONE-YEAR CHANGE IN CORE PARTICIPATION, 2021-2022



CORE RACIAL/ETHNIC DIVERSITY

Diversity is slowly increasing in the core participant base. About three out of every four core participants was a white person in 2022. Over the past 15 years, the share of Hispanic people has increased from less than 5% to 11.5% in 2022. The share of Black people has increased from 6.5% in 2007 to 7.9% in 2022. The share of Asian people who are core participants increased from 3.2% in 2007 to a high of 6.5% in 2014, but fell to 5.6% in 2022.

CORE PARTICIPANT DIVERSITY 2007-2008, 2014-2015, AND 2020-2022

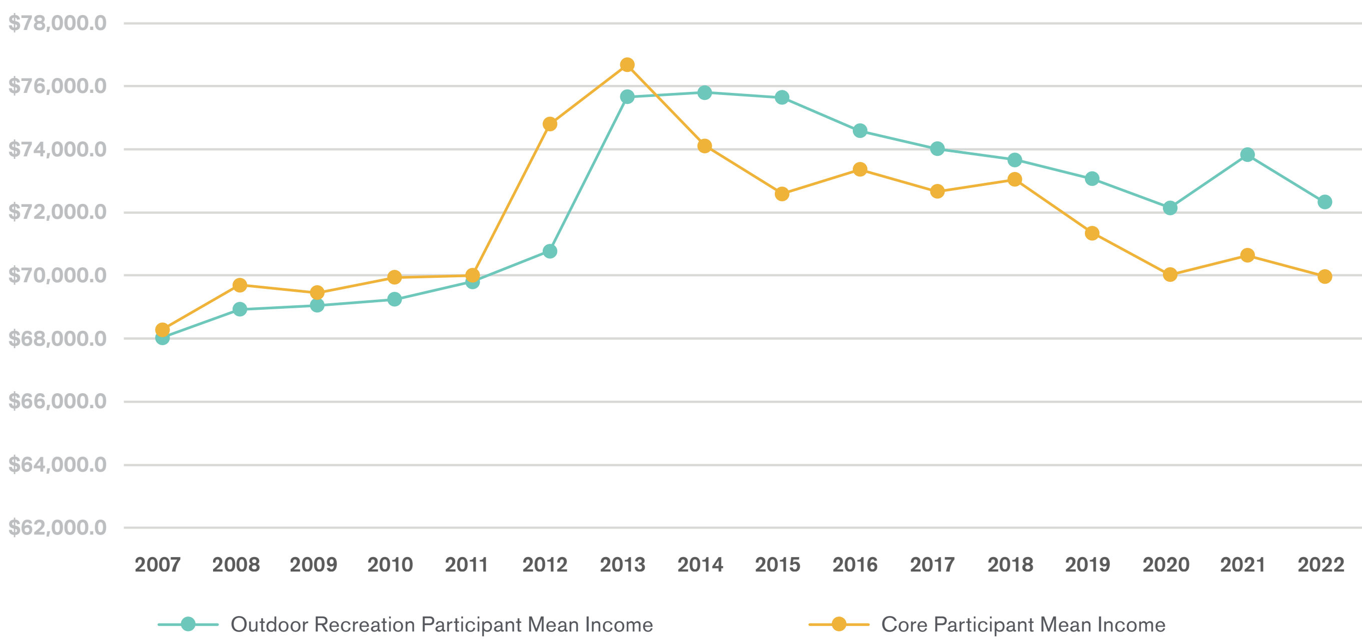


CORE

CORE INCOME

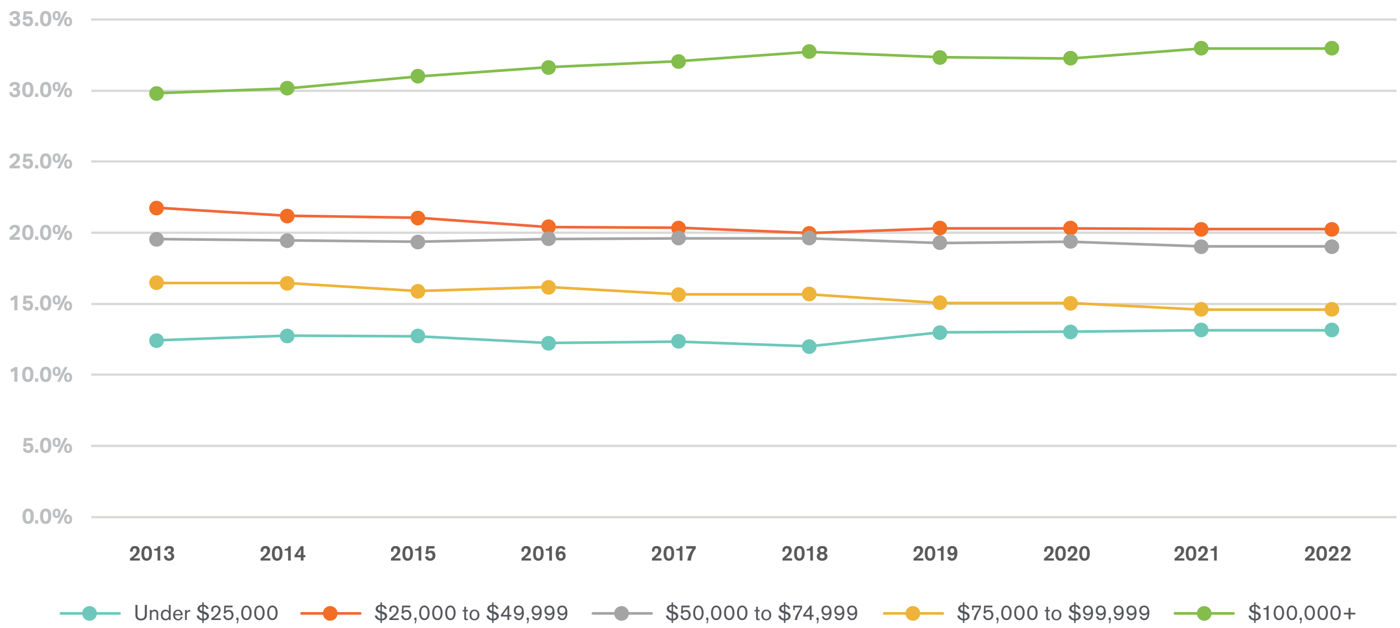
The average annual household income of core outdoor recreation participants was $72,327 in 2022. Core participant household income was slightly lower than the average across the total participant base. The core participant base is younger than the average in the participant base overall.

MEAN HOUSEHOLD INCOME OF CORE PARTICIPANTS AND TOTAL PARTICIPANTS, 2007 TO 2022



One third of core outdoor participants live in households with annual income of $100K or more, but more than one in five core participants has a household income of $25k to $50k. Just 14% of core participants have household income between $75k and $99k.

CORE OUTDOOR PARTICIPATION SHARE BY INCOME BRACKET, 2013 TO 2022

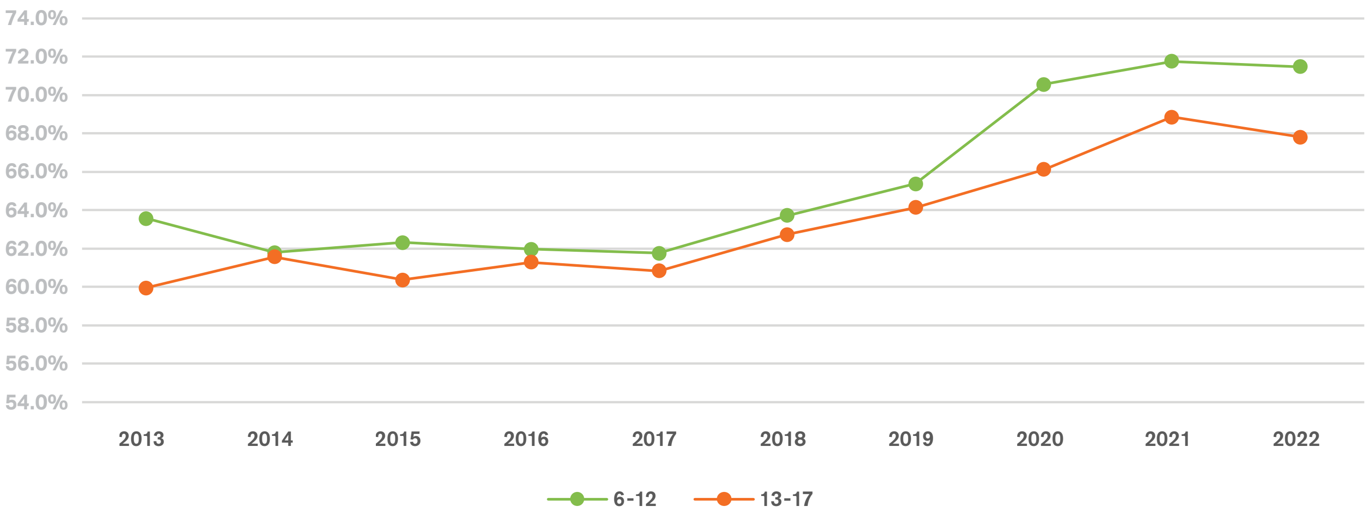


CHILDREN'S OUTDOOR PARTICIPATION

In 2022, 70% of America's children—nearly 35 million—participated in outdoor recreation. Juvenile outdoor recreation participants ages 17 and under made up about 21% of the outdoor participant base in 2022. There were small declines in both participation rates and the total count of juvenile participants for the first time since 2015. The number of children participating fell 500k, or 1.2%, in 2022. It's likely that this pattern will stabilize in the next three years as we move past the pandemic and its heavy impacts on America's children.

Let's look at children's and families' participation rates, racial and ethnic diversity, and the most popular and fastest-growing activities for kids.

PARTICIPATION IN OUTDOOR RECREATION FOR CHILDREN AGES 6-12 AND 13-17, 2013 TO 2022

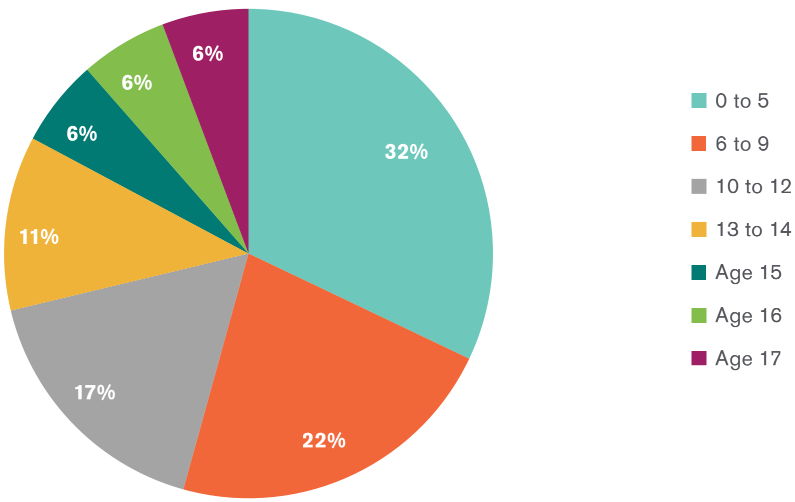


The youngest kids have the highest outdoor participation rates and make up the largest share of juvenile participants. About one in three juvenile participants are five years old or younger. The level of participation for this very young group is dependent on the activity choices made by parents.

Children aged 6 to 12 make up 39% of the juvenile outdoor recreation participant base. These kids can participate independently of their parents, and lifelong outdoor activity patterns begin to take shape in this group. Considering the very high variance in lifetime spend of participants who enter outdoor recreation in childhood compared to those who enter as adults, working to engage all kids in this age group can results in higher long-term impacts for the outdoor market and for the participant. In fact, a metastudy published in the International Journal of Environmental Research and Public Health concluded that long-term physical and mental health benefits are positively correlated with childhood physical activity and their future adult physical activity frequency. In fact, the iconic outdoor company Merrell worked with MIND charity to study the relationship between outdoor activity and mental health in 2020.

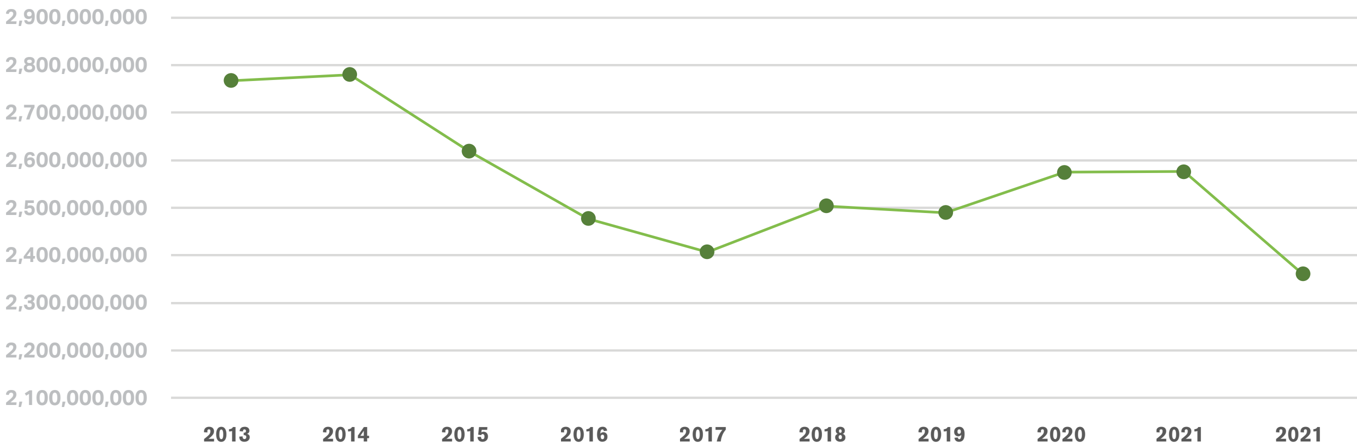
"Merrell is supporting Mind to promote the benefits of time and experiences in the outdoors on mental health, something that has increased in importance during 2020. The new initiative entitled Hike From Home, inspires everyone to explore new, local walks from their doorstep as a means to enjoy time outdoors during the pandemic as well as supporting mental health and wellbeing."

% OF TOTAL JUVENILE OUTDOOR RECREATION PARTICIPANTS BY AGE, 2022



While the number of and the participation rates of kids participating in outdoor recreation is on the rise, the frequency of their outings is falling. The number of children's outings declined 8.4% in 2022, and it currently has a four-year average annual growth rate of -1.6%. In 2013, the average juvenile engaged in 88 outings; in 2022 the average juvenile participant had 68 outings.

TOTAL OUTDOOR RECREATION OUTINGS FOR KIDS AGES 6-17 YEARS 2013 - 2022

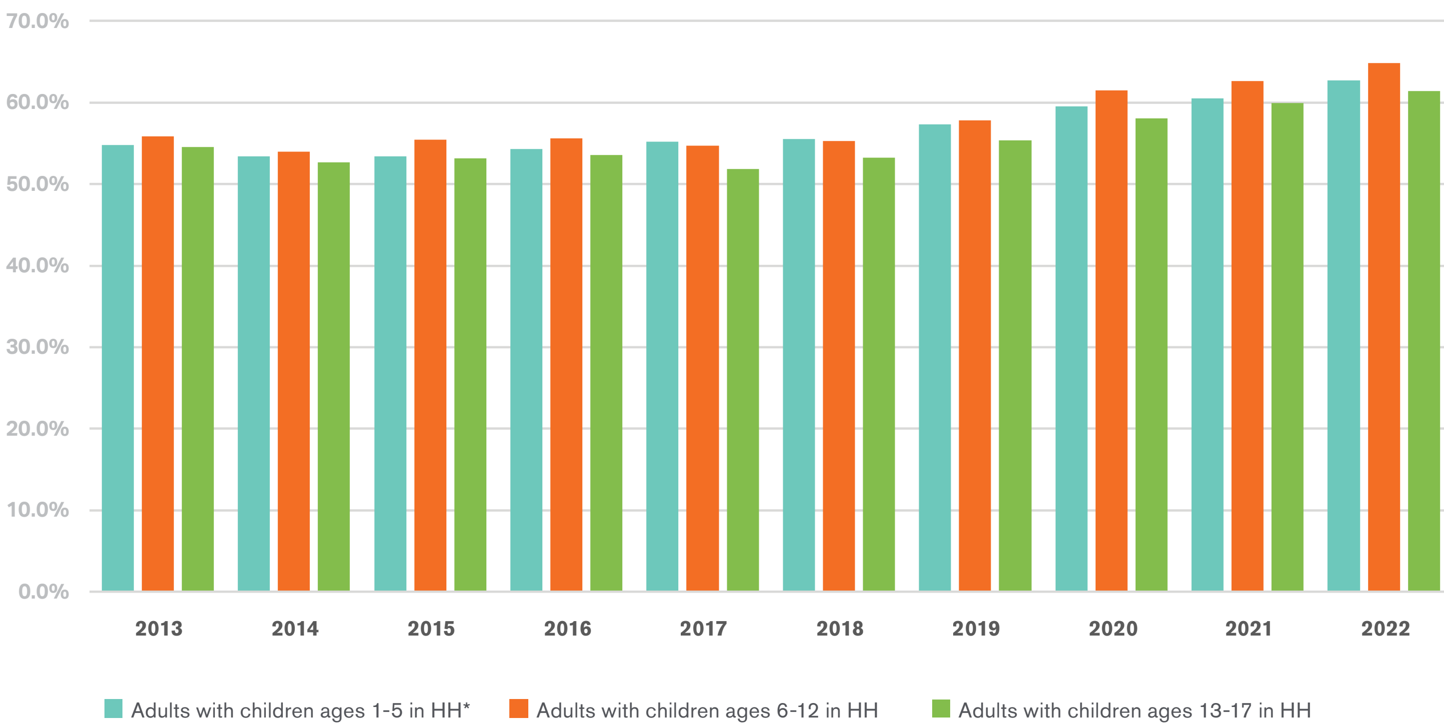


It’s likely that the small decline in 2022 can be attributed to the settling of disruptions caused by the Covid-19 pandemic. Keeping a close eye on participation trends across our youngest participants is critical for a variety of reasons, including the positive correlation between participation in youth and frequency of adult participation, lifetime spend, and the mental and physical health benefits of spending time outdoors. Focusing on younger age groups can have the highest impacts in both the short- and long-term.

ADULTS WITH CHILDREN PARTICIPATION RATES

In 2022, more than 65% of American parents with young children (ages 0 to 5) participated in outdoor recreation. The average annual growth in the participation rate of parents with children (average 2019-2022) was 3.6%, compared with an average annual growth of 2.8% (average 2019-2022).

PARTICIPATION RATES FOR ADULTS WITH CHILDREN, 2013-2022

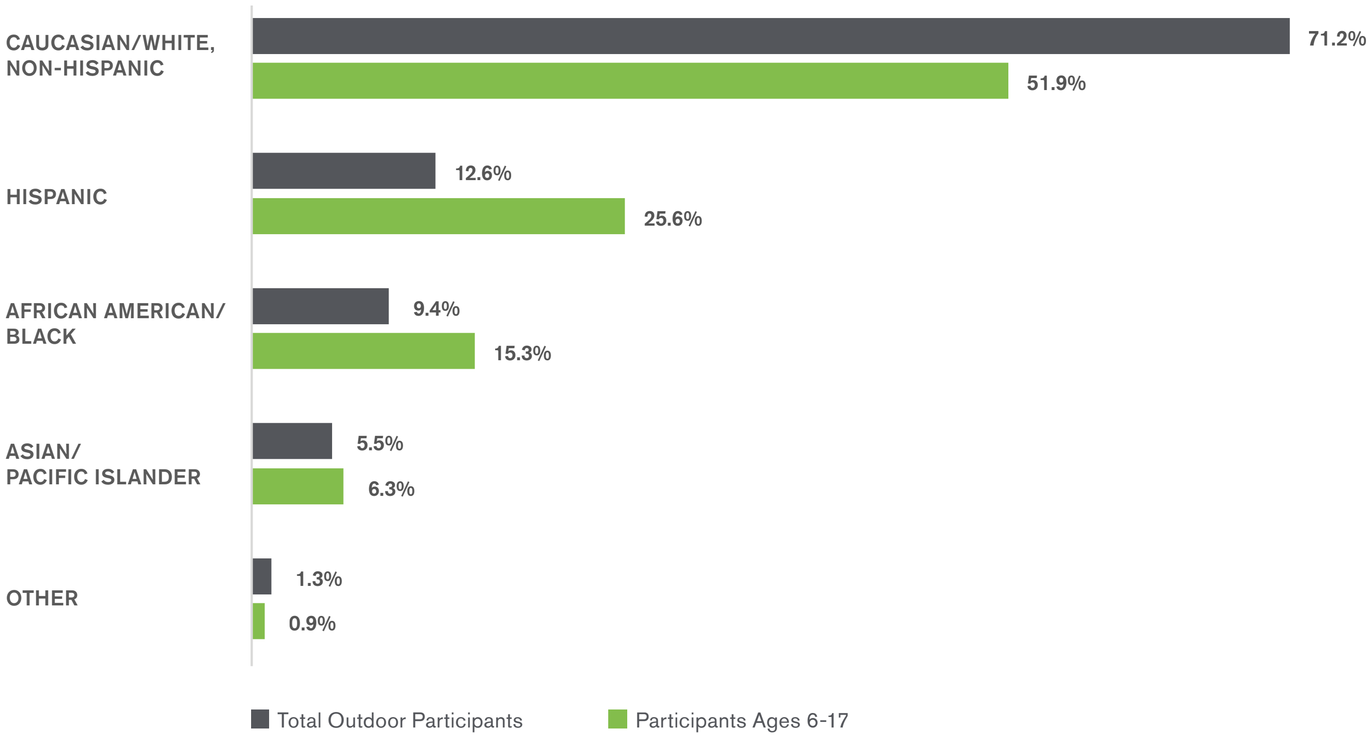


*household

RACIAL/ETHNIC DIVERSITY

The juvenile outdoor recreation participant base is considerably more diverse than the total outdoor recreation participant base. The diversity hints at the success of programs like Thrive Outside, which are working to increase access to outdoor for all kids. Additionally, it bodes well for the outdoor participant base in America, where demographics suggest a significantly more diverse population by 2060 when no single racial group will be a majority.

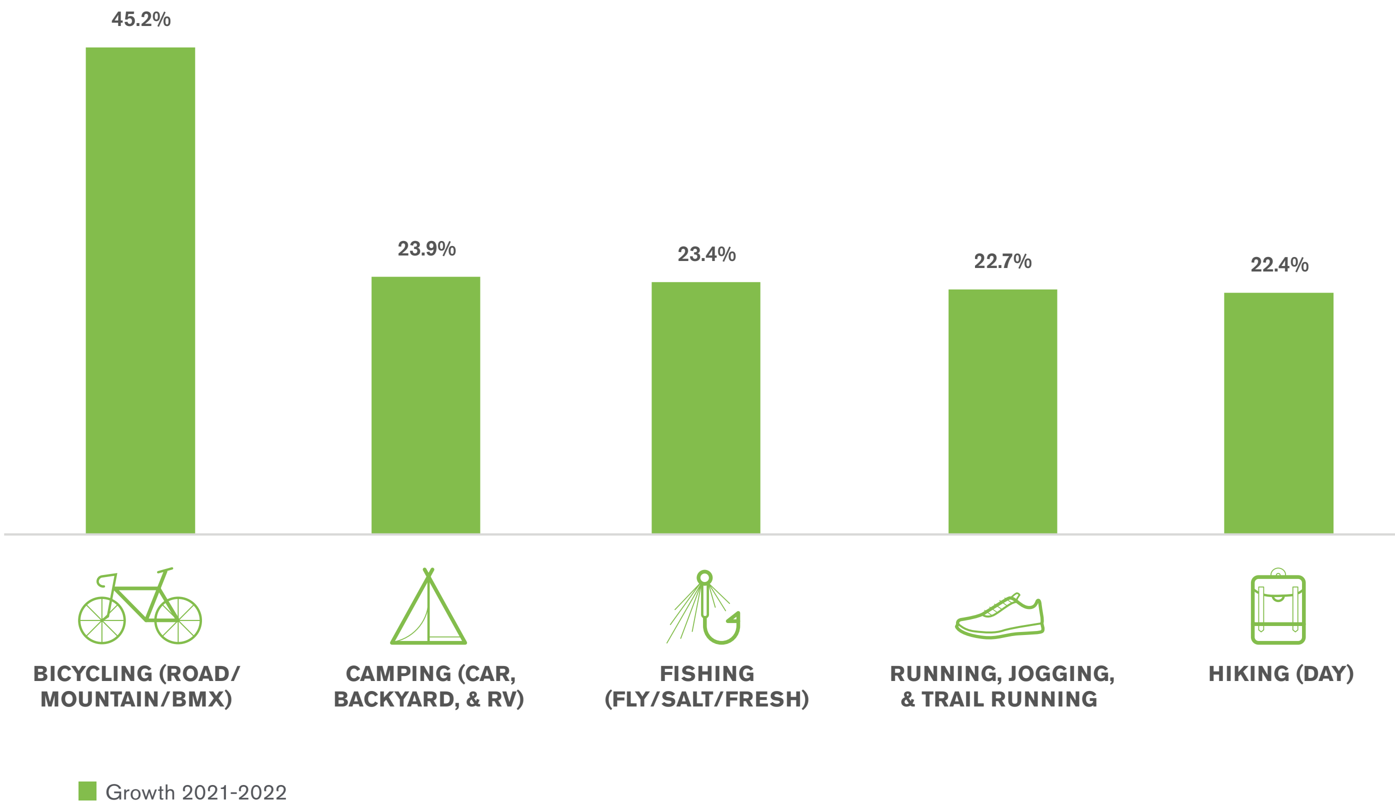
% JUVENILE OUTDOOR PARTICIPANTS V. TOTAL OUTDOOR PARTICIPANTS BY RACE/ETHNICITY, 2022



MOST POPULAR OUTDOOR ACTIVITIES FOR KIDS

The outdoor activity categories with the most children participating include bicycling, camping, fishing, running, and hiking. Bicycling has the highest participation rate among kids at 28.5%. Camping was a close second with 28% of children participating. Participation rates for kids are available on request for all 51 outdoor activity categories.

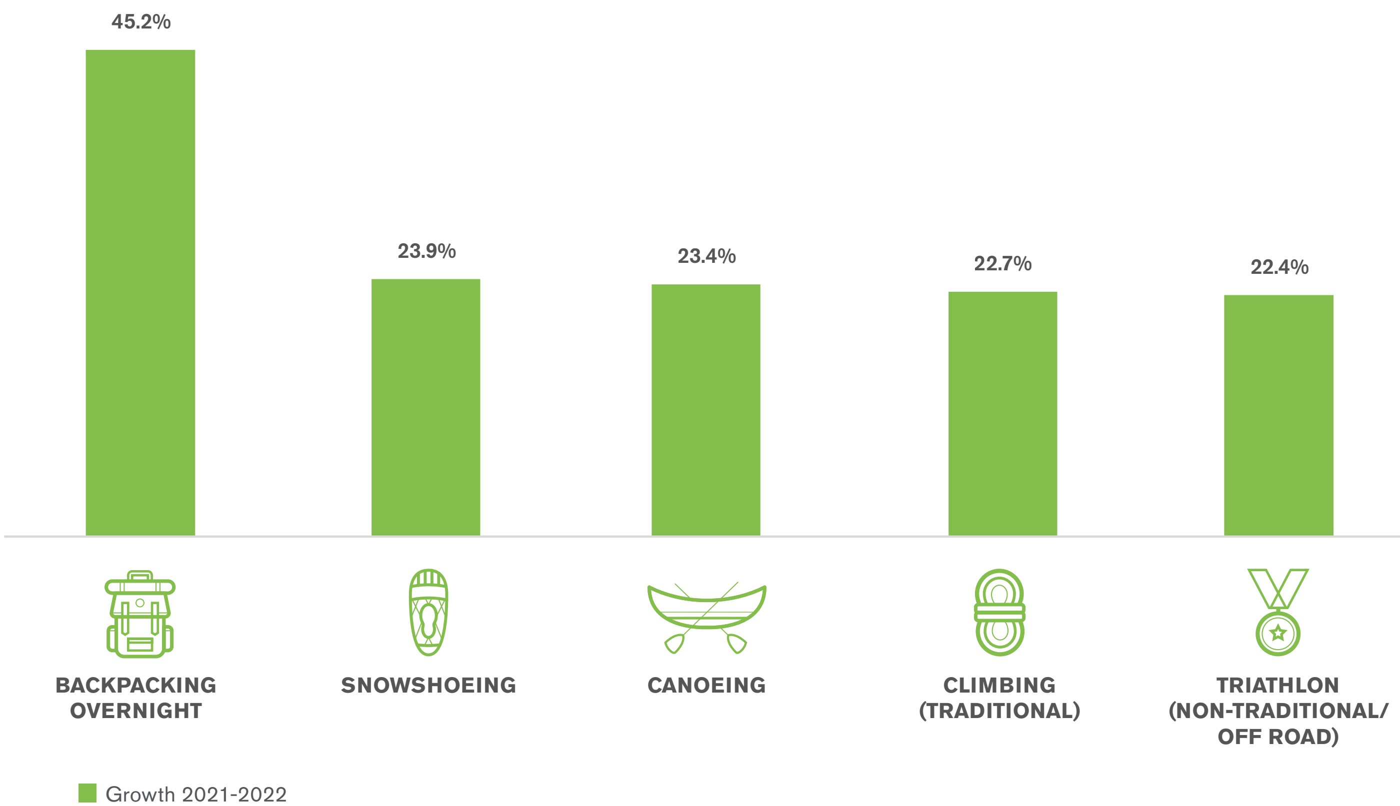
MOST POPULAR ACTIVITIES FOR KIDS AGES 6-17 BY PARTICIPATION RATE, 2022



OUTDOOR ACTIVITIES WITH THE HIGHEST GROWTH FOR CHILDREN

The outdoor activity categories with the highest growth rates among kids in 2022 included backpacking, snowshoeing, canoeing, climbing, and off-road triathlon. More than 2.3 million kids went backpacking in 2022, compared to 1.6 million in 2021. Most outdoor activities (75%) had more children participating in 2022 than in 2021. Categories that were cooling tended to be categories with high growth just after the pandemic began, including surfing, skateboarding and trail running. Despite the decline in 2022, every activity except archery, adventure racing, road running and trail running showed negative annual growth over the past three years.

OUTDOOR ACTIVITY CATEGORIES WITH HIGHEST GROWTH IN JUVENILE PARTICIPANT COUNT, 2022

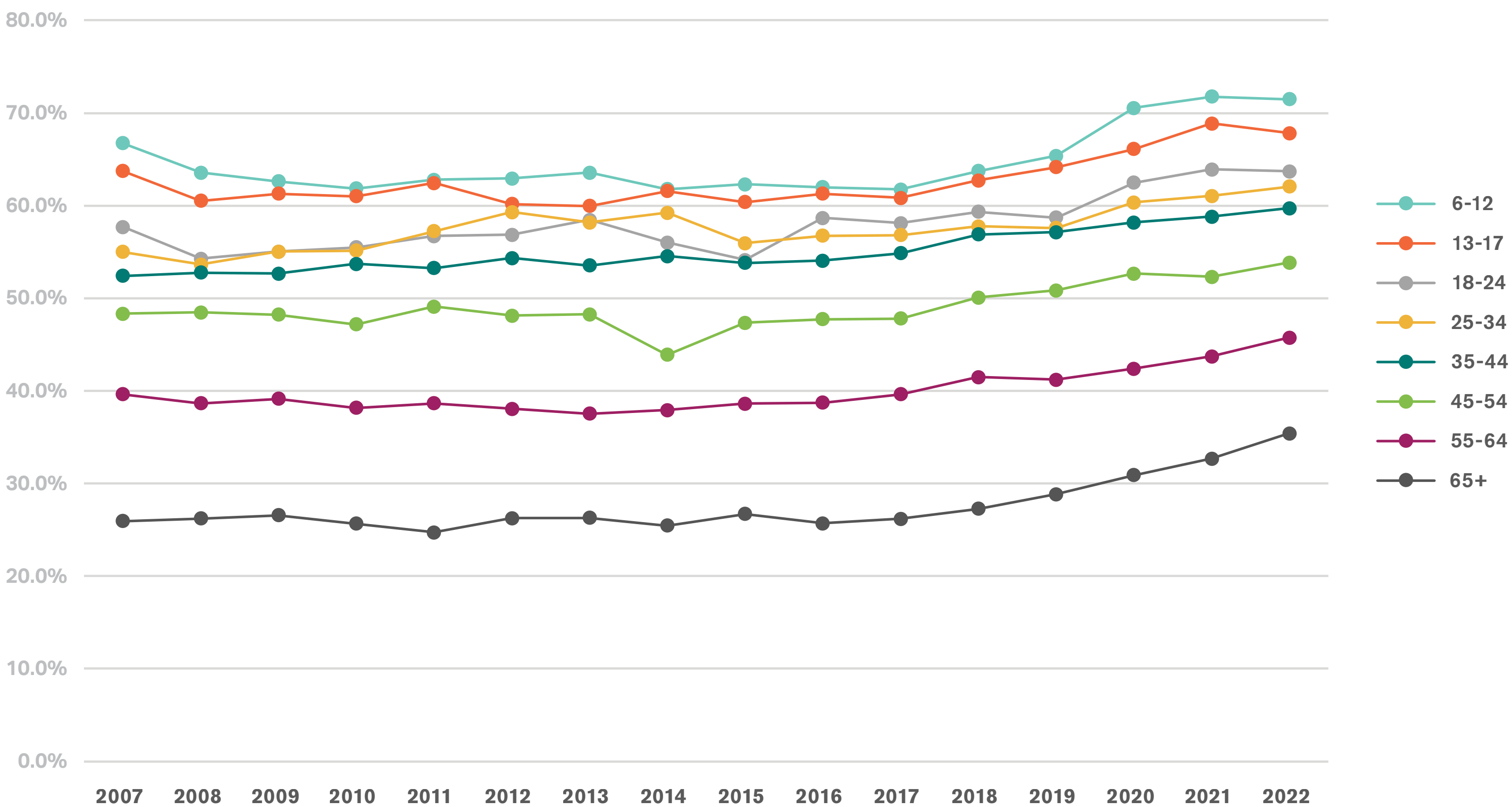


SENIOR PARTICIPATION (65+)

Although the youngest participants have the highest overall participation rates in outdoor recreation, participation rates reliably decline with age. In 2022, 32.7% of Americans ages 65 and older participated in outdoor recreation. Participation growth across age groups driven by the pandemic has slowed but not yet stopped. The highest growth in participation rates between 2018 and 2022—3.6% average annual growth—occurred in the 55-to-64 age group. In the oldest age group (65+ years) the average annual growth rate over the past four years was 7.1%, the highest of any age group in outdoor recreation.

Let's look at senior participation by age group, generation, net worth and sexuality, as well as their most popular activities.

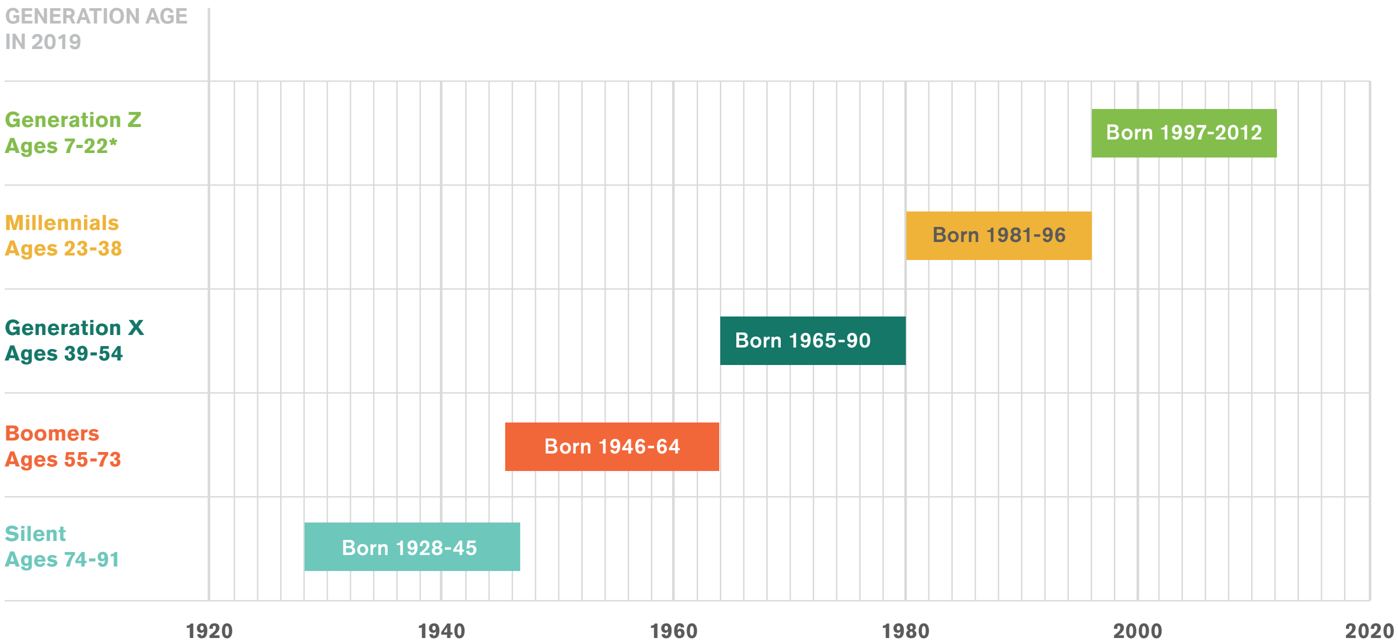
PARTICIPATION RATES BY AGE GROUP, 2013 TO 2022



PARTICIPATION BY GENERATION

It's clear that each successive generation is more active in outdoor recreation than the last. Keep in mind that Baby Boomers were ages 58 to 77 years old in 2022, and the youngest Gen X members were 42 in 2022. Considering long-term trends, it's likely that increasing numbers of older Americans will be part of the outdoor participant base for at least the next three decades.

GENERATIONS



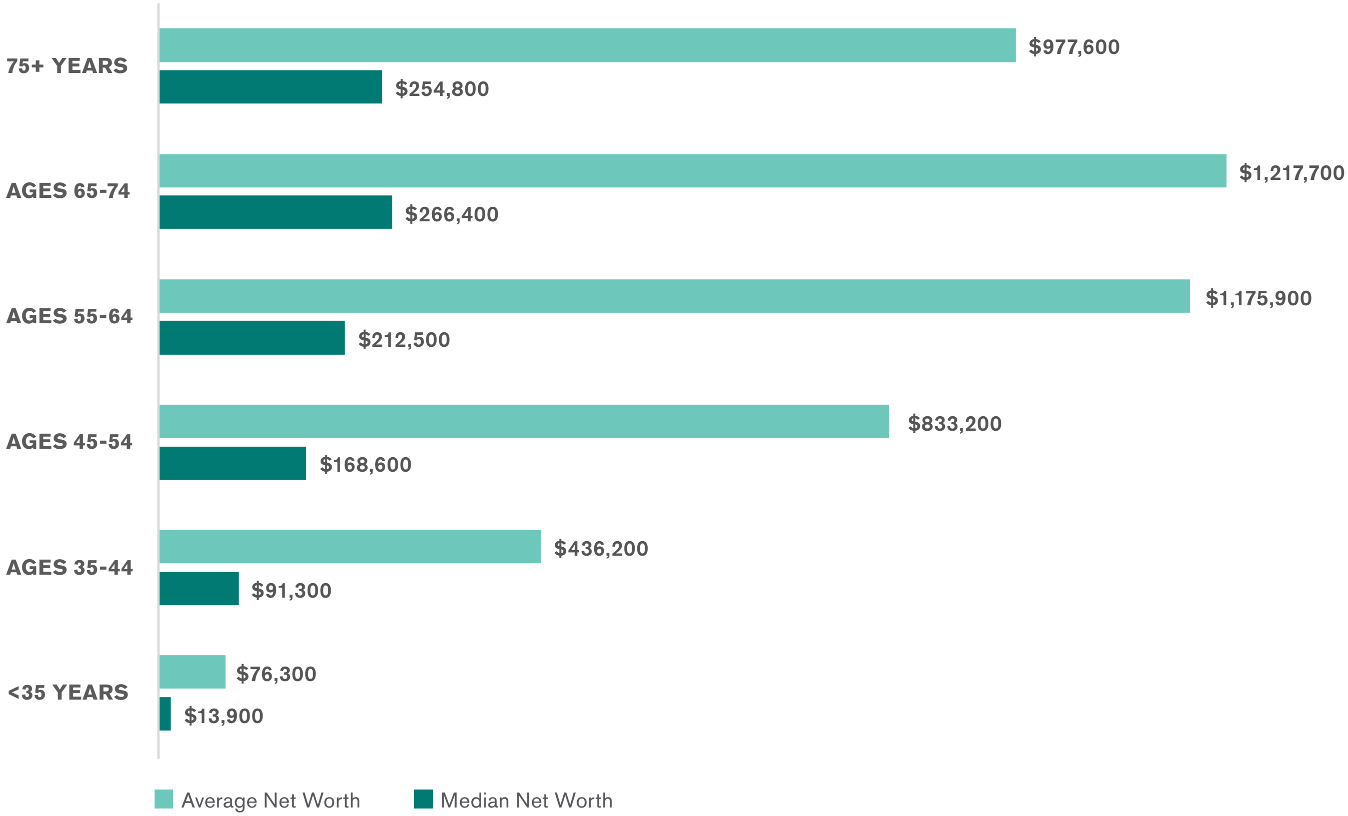
*No chronological endpoint has been set for this group. For this analysis, Generation Z is defined as those ages 7 to 22 in 2019.

Source: PEW RESEARCH CENTER

NET WORTH AND AGE

Increasing numbers of older participants are excellent news for the outdoor market and for outdoor advocacy. Senior participants tend to have more wealth and more time available for recreation compared to younger cohorts.

US MEDIAN AND AVERAGE NET WORTH, AGES 65-74

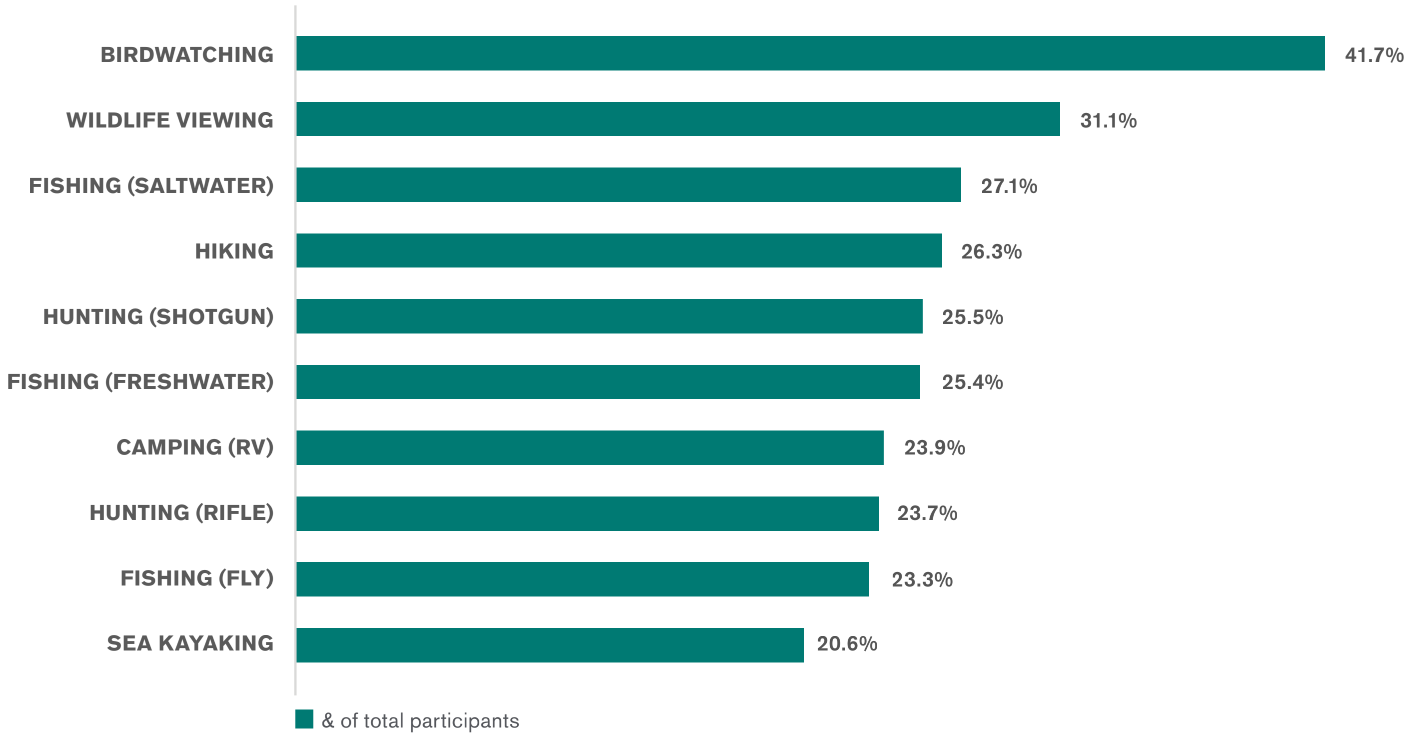


Source: CNBC

MOST POPULAR ACTIVITIES FOR SENIORS

Older outdoor recreators make up a significant share of outdoor recreation's largest activities, including hiking, fishing, birding and hunting. Birdwatching and wildlife viewing have the highest percentage of older participants. Nearly 42% of birdwatching's 15.8 million participants are 55 or older and 31% of wildlife viewing's 20.6 million participants are 55 or older.

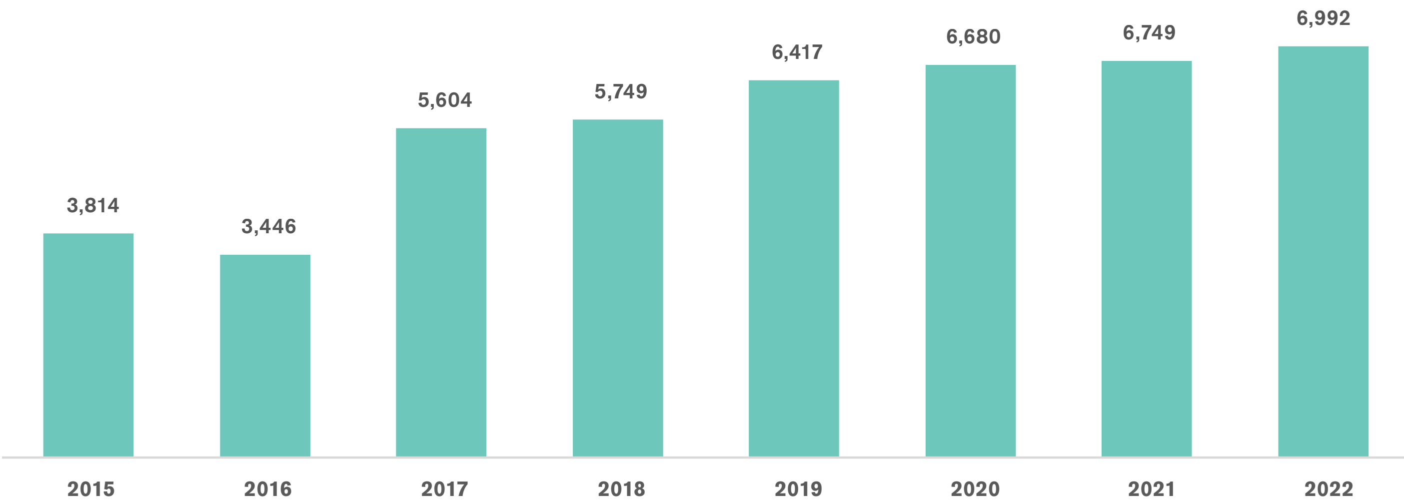
FAVORITE ACTIVITIES OF OUTDOOR RECREATION PARTICIPANTS AGES 55 YEARS AND OLDER, 2022



NEW PARTICIPANT PROFILE 2022

In 2022, 7 million Americans participated in outdoor recreation activities for the first time, or for the first time in years. In 2022, the size of the new participant cohort was 83% larger than the new participant cohort in 2015.

TOTAL NEW OUTDOOR PARTICIPANTS, 2015-2022

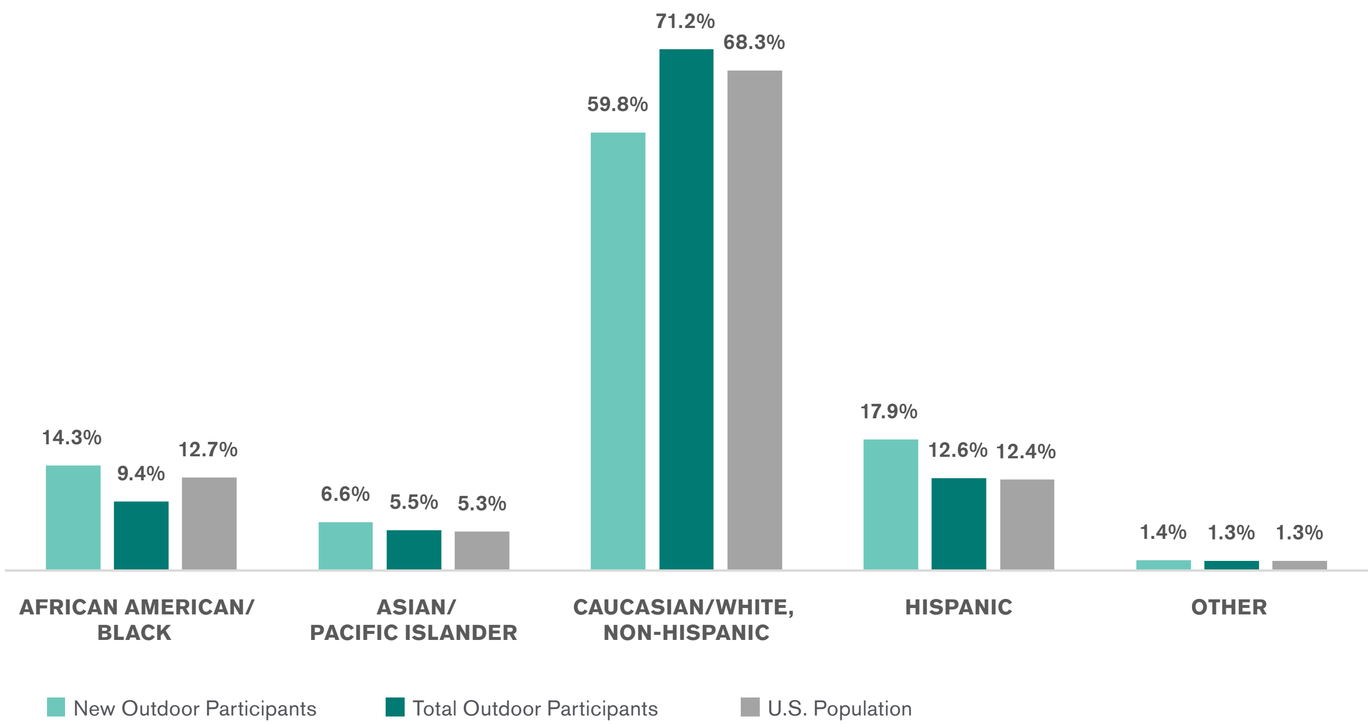


This very important group of participants illustrates how attractive outdoor activities are to non-participants, and how many return after a two-year or longer lapse in participation. Let's explore the diversity, gender, and age demographics of new and returning outdoor recreation participants.

RACIAL/ETHNIC DIVERSITY

This cohort of new participants is significantly more diverse than the current outdoor recreation participant base and more diverse than the US population. In 2022, white people made up 60% of the new participant group compared to 71% of the total outdoor recreation participant base. And this group of new participants are younger than the total outdoor participant base.

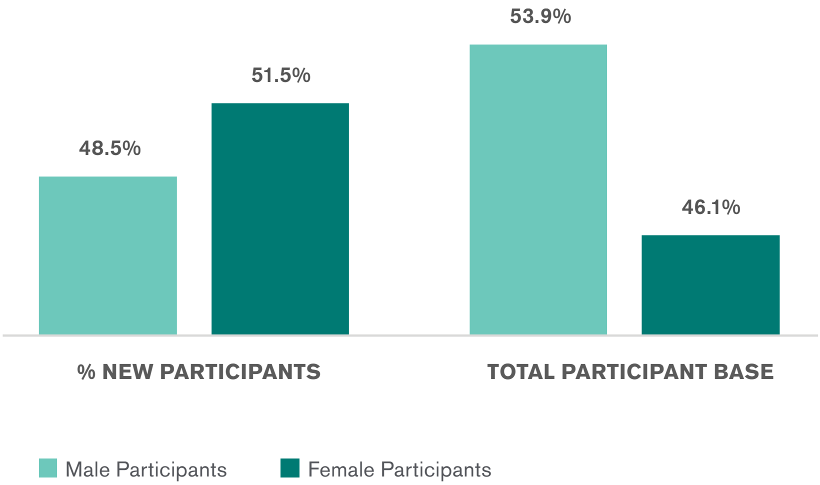
ETHNIC/RACIAL DIVERSITY IN NEW OUTDOOR PARTICIPANTS, TOTAL OUTDOOR PARTICIPANTS, AND TOTAL US POPULATION, 2022



GENDER

In 2022, there were more new female participants than new male participants. Note that more females leave the participation base in outdoor activity than male participants. The net result is very slow movement toward parity between male and female participant counts.

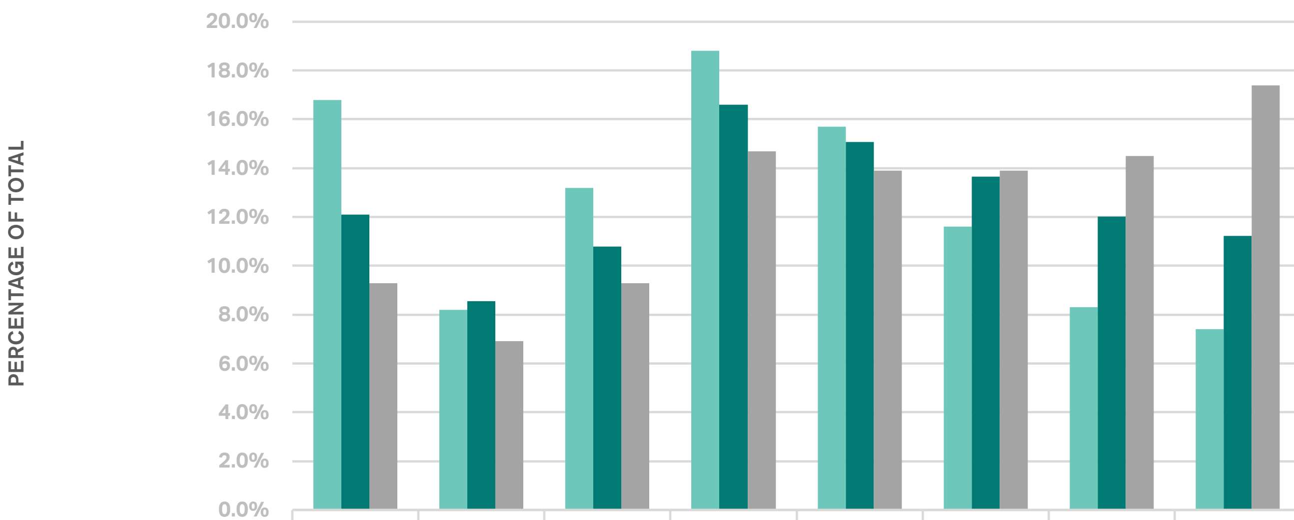
NEW V. TOTAL OUTDOOR RECREATION PARTICIPANTS BY GENDER, 2022



AGE

Most adult participants in outdoor recreation began participating when they were kids. A research study in Preventive Medicine confirmed that the frequency of outdoor activity in adults is highly correlated with their outdoor activity as children. New outdoor participants tend to be younger than the overall participant base. Although new participants skew younger, more than 1 million Americans ages 55 and older participated for the first time in 2022.

NEW PARTICIPANTS, TOTAL OUTDOOR PARTICIPANTS, AND US POPULATION BY AGE GROUP, 2022



	6 TO 12	13 TO 17	18 TO 24	25 TO 34	35 TO 44	45 TO 54	55 TO 64	65+
New Outdoor Participants	16.8%	8.2%	13.2%	18.8%	15.7%	11.6%	8.3%	7.4%
Total Outdoor Participants	12.1%	8.5%	10.8%	16.6%	15.1%	13.6%	12.0%	11.2%
U.S. Population	9.3%	6.9%	9.3%	14.7%	13.9%	13.9%	14.5%	17.4%

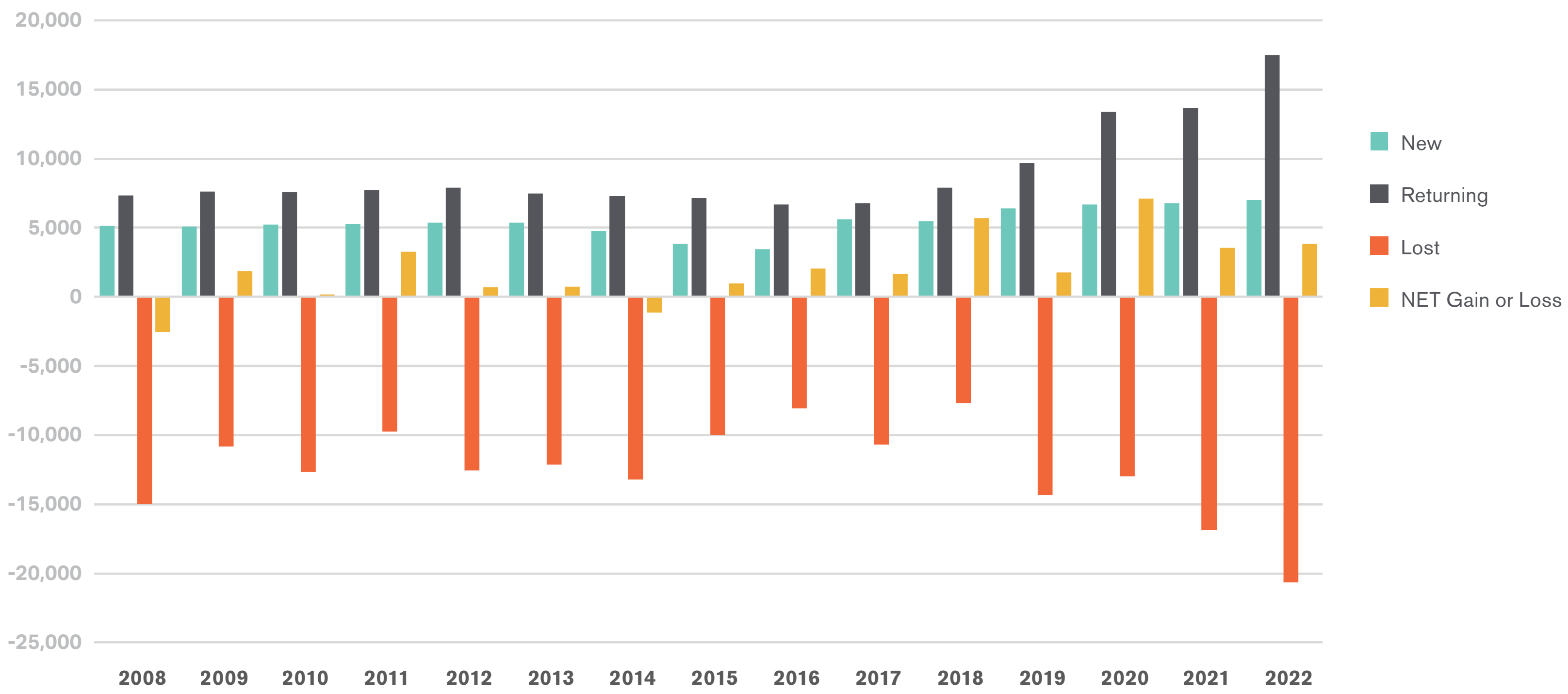
LOST PARTICIPANT PROFILE

In 2022, 20.6 million outdoor recreation participants stopped participating in outdoor recreation. The number of people leaving outdoor recreation increased by more than 4 million in 2022. The data validates concerns about the outdoor industry's ability to retain current participants, especially those who entered the market engaged in outdoor activities.

The number of participants leaving the market hit a record high in 2022. Fortunately, more participants entered or re-entered the outdoor participant base than exited in 2022, leave a net gain of about 3.8 million.

In the past, the outdoor participant base experienced net decline in just two of the past 15 years, 2008 and 2014. Despite the net positive gain in total participants in 2022, the number leaving the participant base is a trend to watch in 2023 and beyond to measure our ability to engage current participants and prevent declines across the outdoor recreation participant base.

WHO ARE NEW, RETURNING AND LOST OUTDOOR RECREATION PARTICIPANTS AND NET GAIN/LOSS, 2008 TO 2022

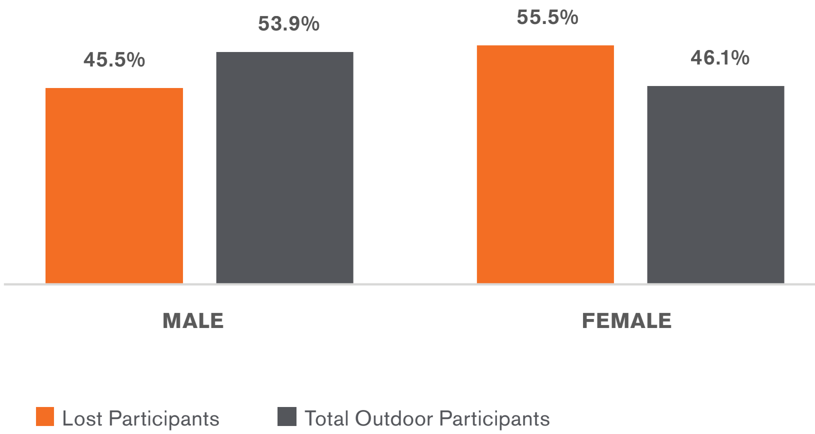


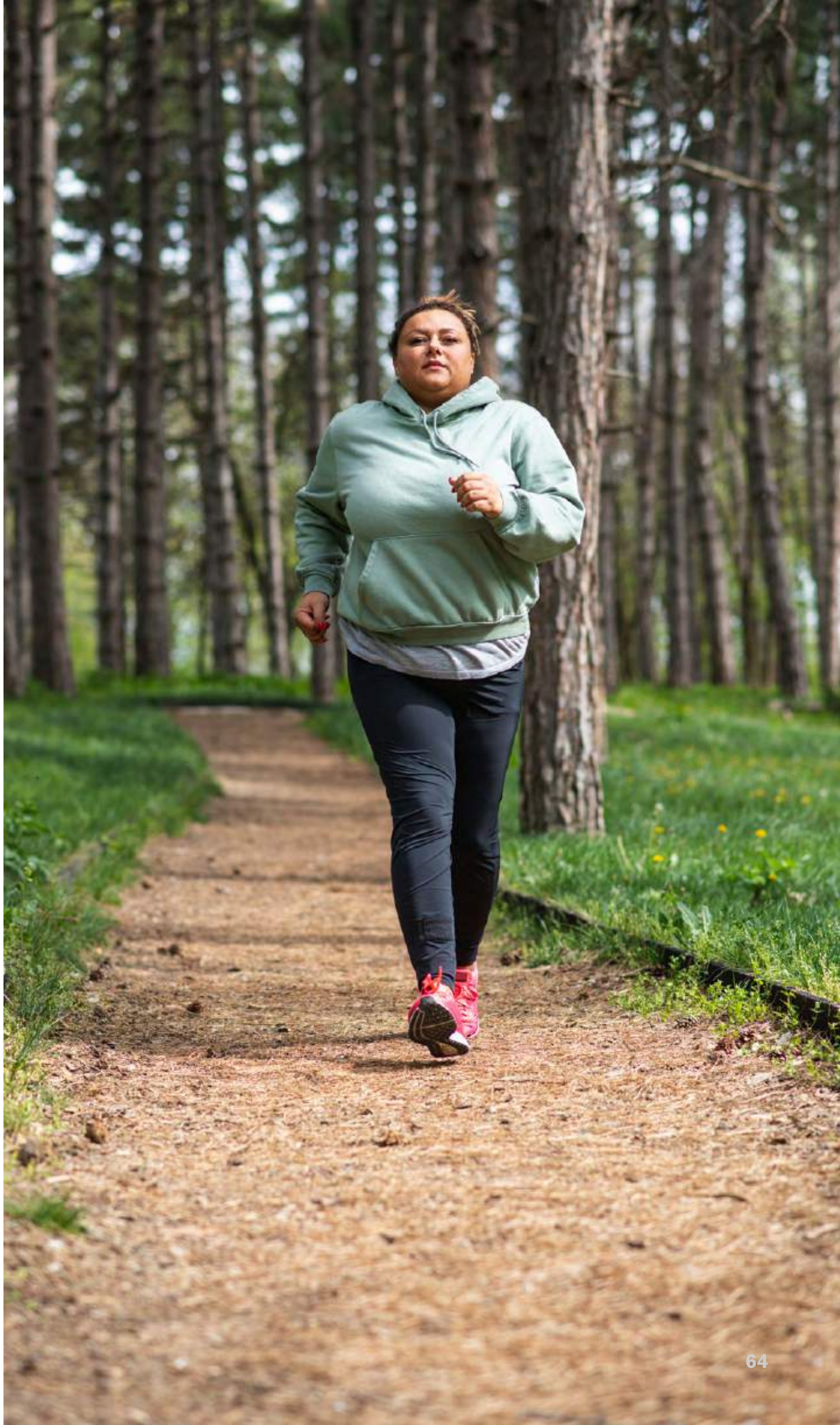
GENDER

More females leave the outdoor participant base than males on a yearly basis in a trend that started in the indefinite past.

LOST AND TOTAL PARTICIPANTS BY GENDER, 2022

(N=20,641)

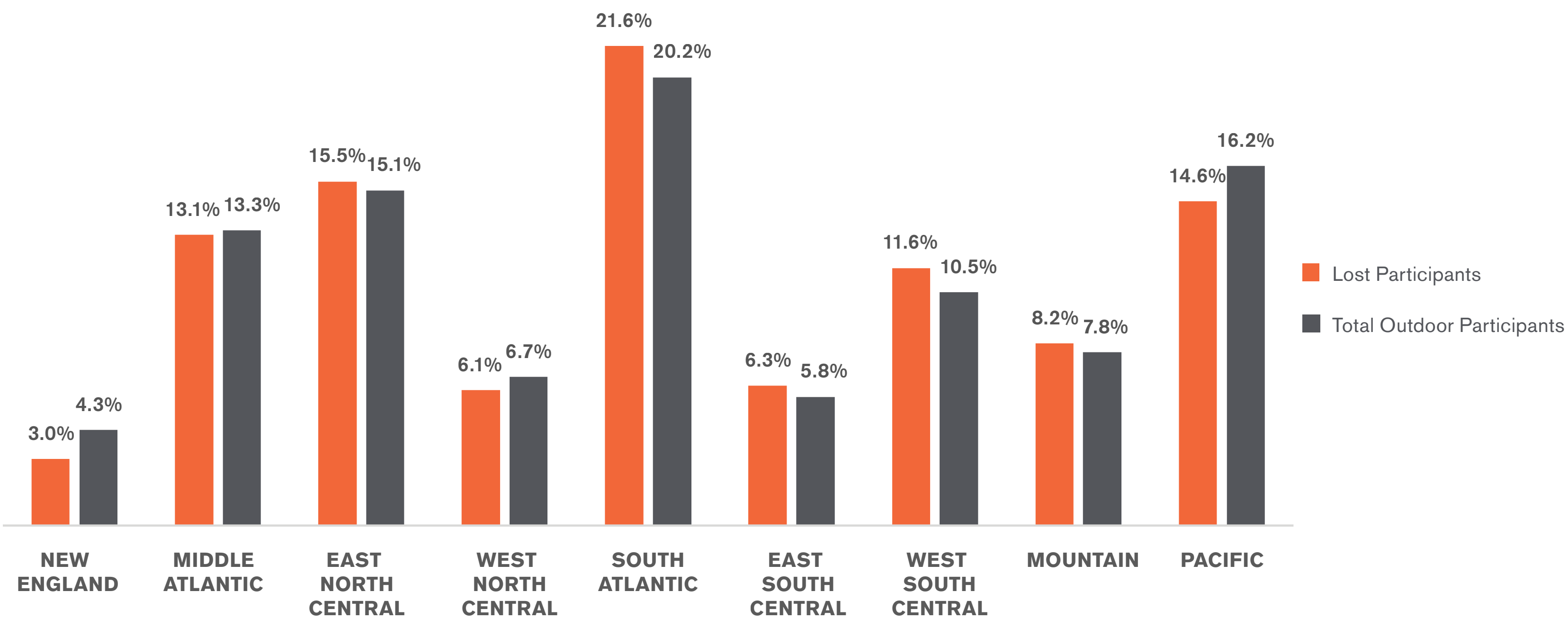




REGION

Overall, there does not appear to be any significant correlation between the region lost participants reside in and their decision to stop participating. This data may become more potent if climate change impacts bring unhospitable conditions like fire or flooding to a specific region. OIA Research expects those signals to be faint but growing over the next decade.

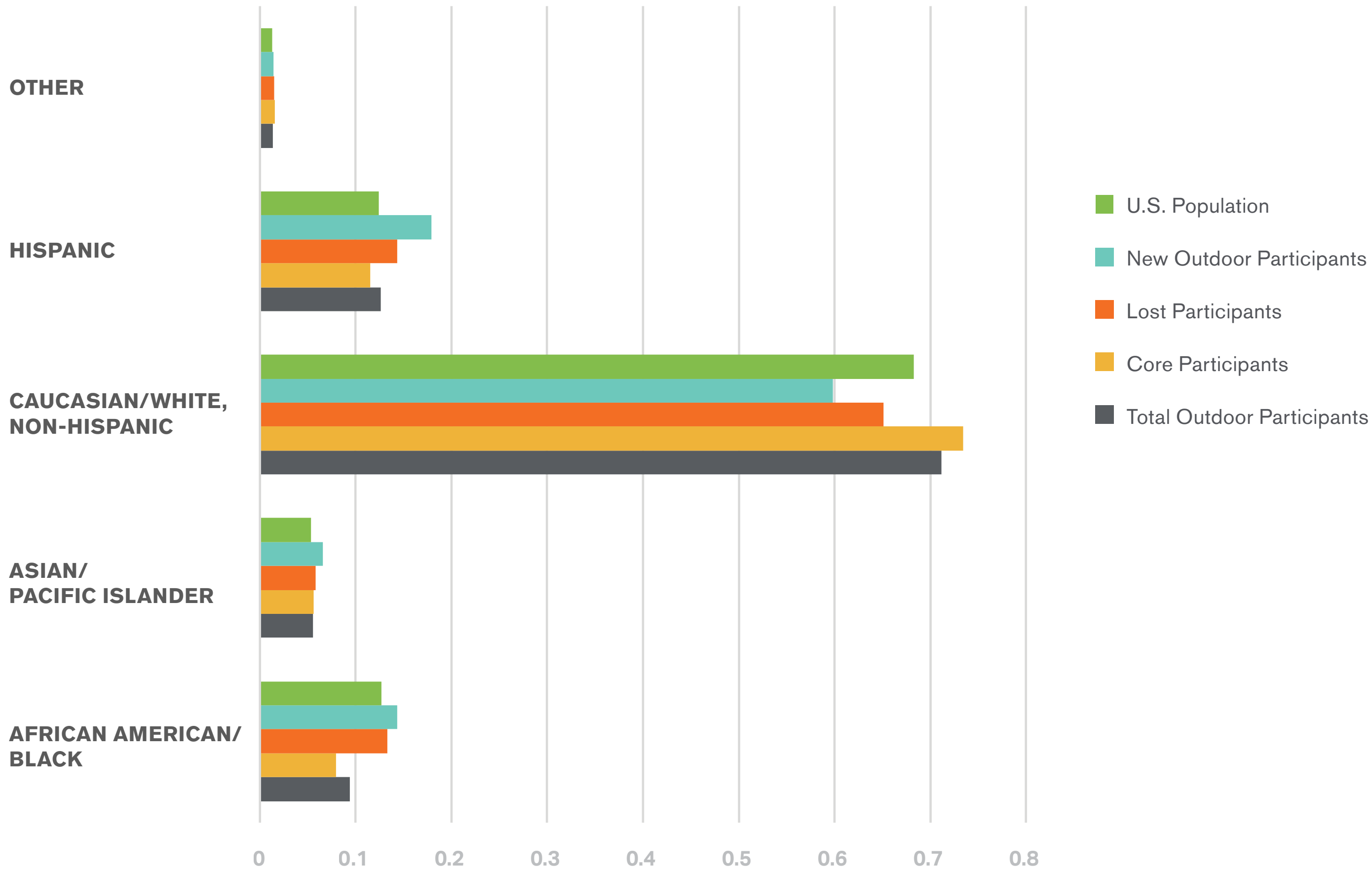
REGION OF RESIDENCE FOR LOST V. TOTAL OUTDOOR RECREATION PARTICIPANT BASE, 2022



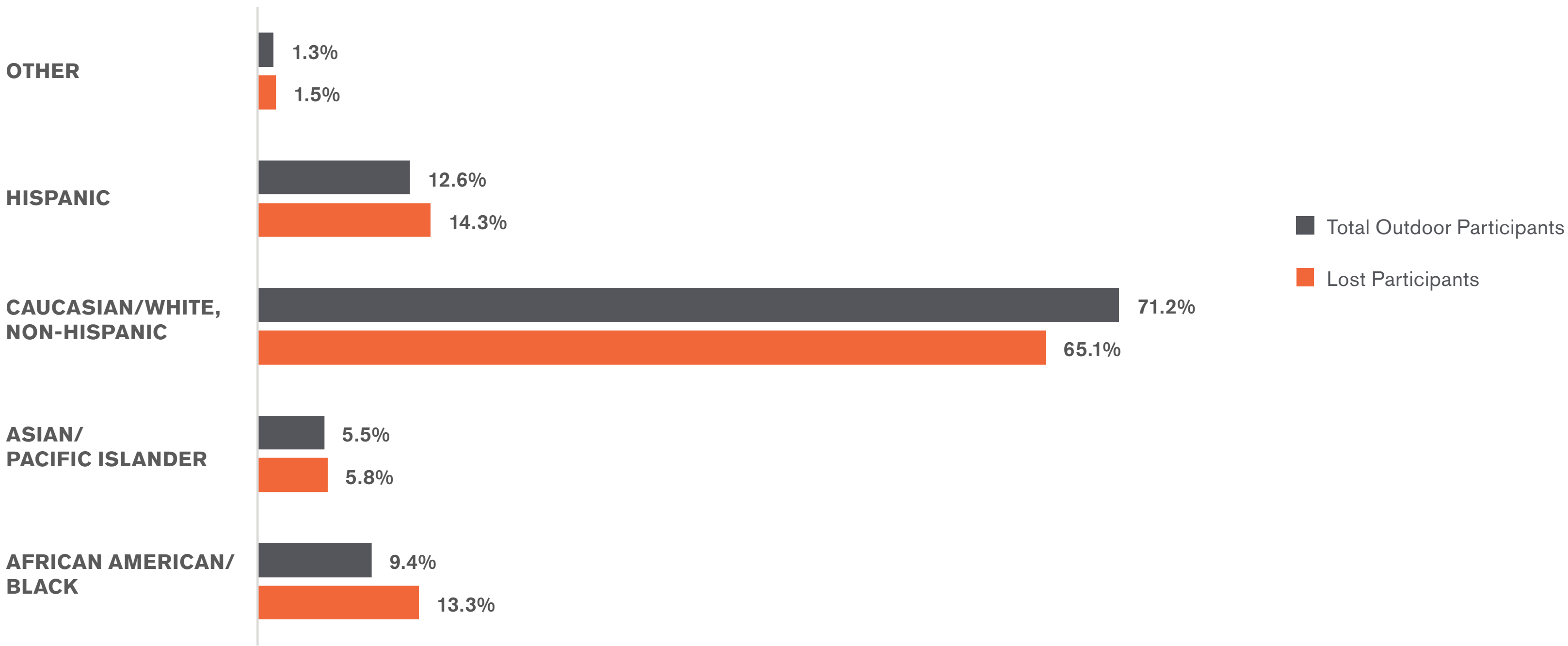
RACIAL/ETHNIC DIVERSITY

Lost participants are slightly more diverse than the total outdoor participant base. This is concerning because efforts to expand access to outdoor recreation to all, and to think more inclusively about outdoor recreation, has led to growing diversity. Considering gains made during the pandemic in participant counts, it's possible that the diversity data for lost participants is a reflection of growing diversity of people who sample outdoor recreation experiences like hiking or indoor climbing but do not become regular participants.

OVERALL, NEW, LOST AND CORE PARTICIPANTS' ETHNIC/RACIAL DIVERSITY, 2022



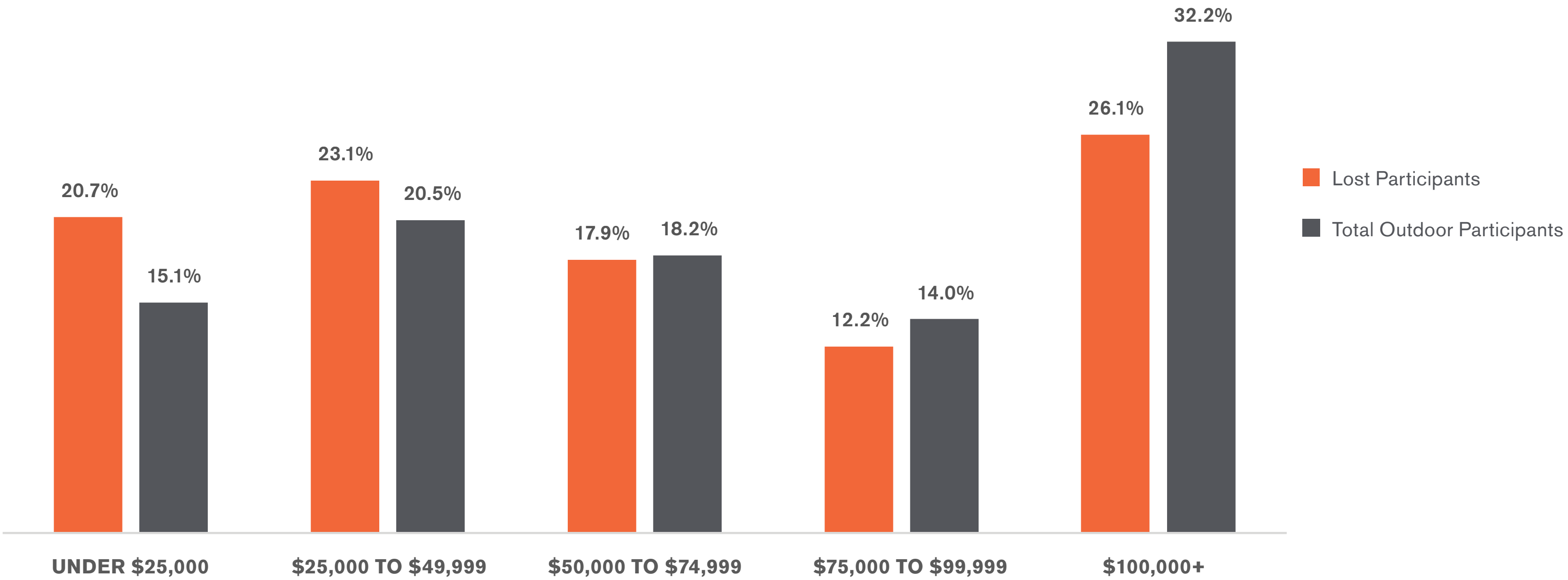
LOST V. TOTAL PARTICIPANT BASE ETHNIC/RACIAL DIVERSITY, 2022



INCOME

The income diversity across lost participants indicates that people with lower income levels struggle a bit to be regular outdoor recreation participants. We lose a higher percentage of members in lower income groups than higher income groups.

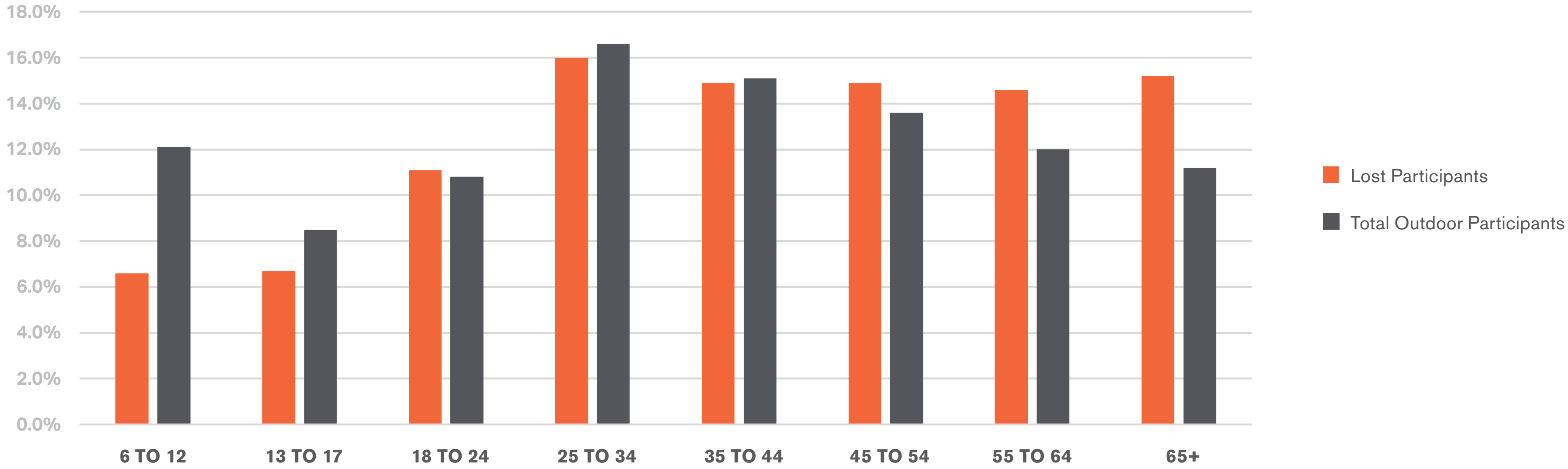
INCOME LEVELS OF LOST V. TOTAL OUTDOOR PARTICIPANT BASE, 2022



AGE

Lost participants tend to be older. The data below indicates that older age groups lose a greater proportion of participants than younger age groups. The conclusion is not surprising, but we may see more participants entering and staying in the market as Gen X and the Baby Boomers age.

LOST PARTICIPANTS BY AGE GROUP, 2022



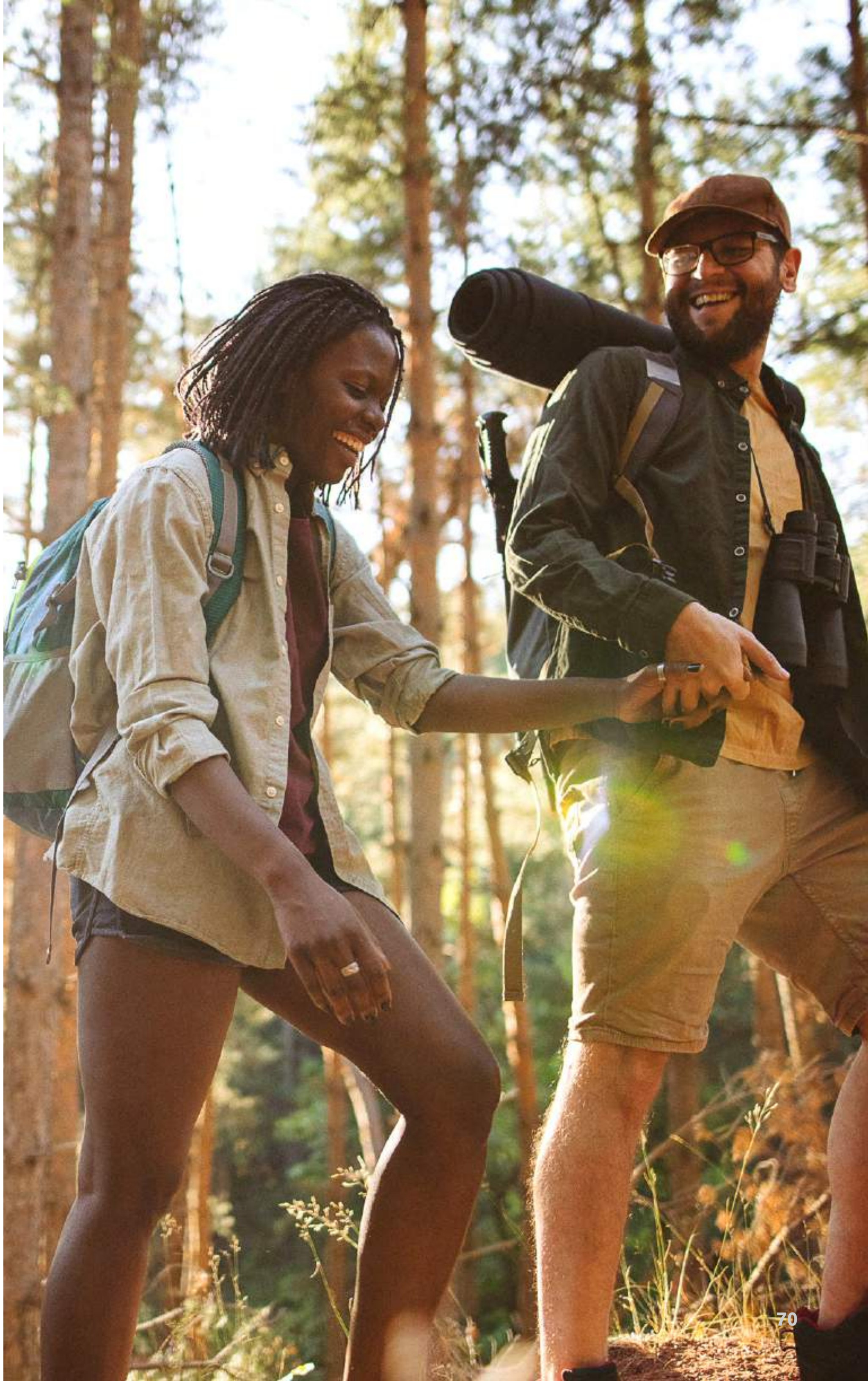
CONCLUSION

The outdoor recreation participant base has grown significantly over the past three years, but the frequency of participation is dropping. The Covid-19 pandemic spurred growth in 2020, and that growth continued through 2022. Over the past three years, the participant base expanded by 14.5 million participants.

Many new participants begin their journey into outdoor recreation on a casual basis like camping with the family a few times a year, hiking from time to time with friends, and spending a little bit more time outdoors. While more casual consumers of outdoor experiences have swollen the ranks of outdoor participants, the frequency of participation as well as the base of core participants is declining. The percentage of the market that are considered core participants who participate in outdoor activities at least once per week are becoming scarcer.

Diversity is growing in the outdoor recreation participant base, especially among new and young participants. New and young outdoor participants are more likely to be BIPOC and are driving more ethnic/racial diversity into the participant base. In addition to racial/ethnic diversity, new participants are driving increased participation among older Americans and members of the LGBTQIA+ community. These trends appear to be accelerating along with the increase in diversity across the US population.

The casual outdoor consumer is in. This data tells us that more casual participants are going to be seeking out experiences outdoors and will be shopping for products that are a little less technical and sell at lower price points. Additionally, it shows us that the new participants who showed up in outdoor recreation because of disruptions related to the pandemic did not leave outdoor recreation in droves as the inside world re-opened and they could once again dine out, go to movies and shows, etc. Messaging tailored to casual participants searching for notable outdoor experiences is likely to bring in the highest engagement.



APPENDIX

METHODOLOGY

How was the participation study conducted?

2021 PARTICIPATION DATA

All participation statistics are from a nationwide study conducted during the 2021 calendar year by Sports Marketing Surveys USA (SMS). Under the guidance of the Sports and Fitness Industry Association (SFIA) and seven other sports industry associations that make up the Physical Activity Council (PAC), the participation study was designed and launched by Digital Research (DRI). All other data is attributable to the SFIA/SMS research partnership.

SAMPLE SPECIFICATION

During 2022, a total of 18,000 online interviews were carried out with a nationwide sample of individuals from US proprietary online panels representative of the US population for people ages six and older. Strict quotas associated with gender, age, income, region, and ethnicity were followed to ensure a balanced sample.

The 2022 participation survey sample size of 18,000 completed interviews provides a high degree of statistical accuracy. All surveys are subject to some level of standard error—that is, the degree to which the results might differ from those obtained by a complete census of every person in the US A sport with a participation rate of 5% has a confidence interval of plus or minus 0.32 percentage points at the 95% confidence level.

A weighting technique was used to balance the data to reflect the total US population aged six and above. The following variables were used: gender, age, income, ethnicity, household size, region, and population density. The total population figure used was 304,745,039 people aged 6 and older.

Activity reporting is based on a rolling 12-month participation rate. All charts represent data from U.S. populations aged 6 and over unless otherwise specified. If you have specific questions regarding the methodology, please contact Sports Marketing Surveys at info@sportsmarketingsurveysusa.com.

YOUTH INTERVIEWS

All interviews with children under 13 were carried out following the guidelines set out in the Children's Online Privacy Protection Act of 1998 (COPPA). No children were contacted directly. The panel is a balanced sample of households with children in each age group, but contact is always made through designated adult panelists. The adult panelist receives the survey invitation on behalf of a specified child, age six to 12, and are asked to complete the survey together. Respondents ages 13 to 17 are contacted in a manner similar to respondents ages 6 to 12, but they are asked to complete the survey themselves.

ABOUT THE PHYSICAL ACTIVITY COUNCIL (PAC)

The survey that forms the basis of the 2022 Special Report on Hunting & the Shooting Sports is produced by the Physical Activity Council (PAC), which is a partnership of leading organizations in the US sports, fitness and leisure industries. While the overall aim of the survey is to establish levels of activity and identify key trends in sports, fitness and recreation participation, each partner produces detailed reports on specific areas of interest. Partners include Outdoor Foundation (OF); National Golf Foundation (NGF); Snowsports Industries America (SIA); Tennis Industry Association (TIA); USA Football; United States Tennis Association (USTA), International Health and Racquet and Sportsclub Association (IHRSA); and Sport and Fitness Industry Association (SFIA).

NOTES

Unless otherwise noted, the data in this report was collected during the 2022 participation survey, which focused on American participation in the 2021 calendar year. Please note that some information includes data that was collected during previous surveys, as some questions are not asked every year.

OUTDOOR INDUSTRY ASSOCIATION

P.O. Box 21497
Boulder, CO 80308 USA
303.444.3353

OUTDOORINDUSTRY.ORG