2024 OUTDOOR PARTICIPATION TRENDS REPORT

EXECUTIVE SUMMARY

OUTDOOR FOUNDATION

OUTDOOR INDUSTRY ASSOCIATION

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EXECUTIVE SUMMARY

This year's Outdoor Participation Trends Report goes beyond the data — use it to stay on top of trends, allocate resources, and inform your overall marketing strategy.

In 2023, the outdoor recreation participant base grew 4.1% to a record 175.8 million participants: 57.3% of all Americans aged six and older. The number of participants increased across demographics and activities as new, more casual participants began hiking, biking, camping, running, and fishing. In 2023, 7.7 million Americans tried one or more outdoor recreation activities for the first time. New and young outdoor recreation participants are driving growth and increased diversity in the outdoor recreation participant base, including increasing numbers of women, people of color, and seniors. The growth that began in 2016 and accelerated during the COVID pandemic is showing few signs of slowing. Engaging these new, more diverse, more casual participants to participate more frequently is the key opportunity for the outdoor industry today.

IN 2023,

THE OUTDOOR RECREATION PARTICIPANT BASE GREW 4.1%

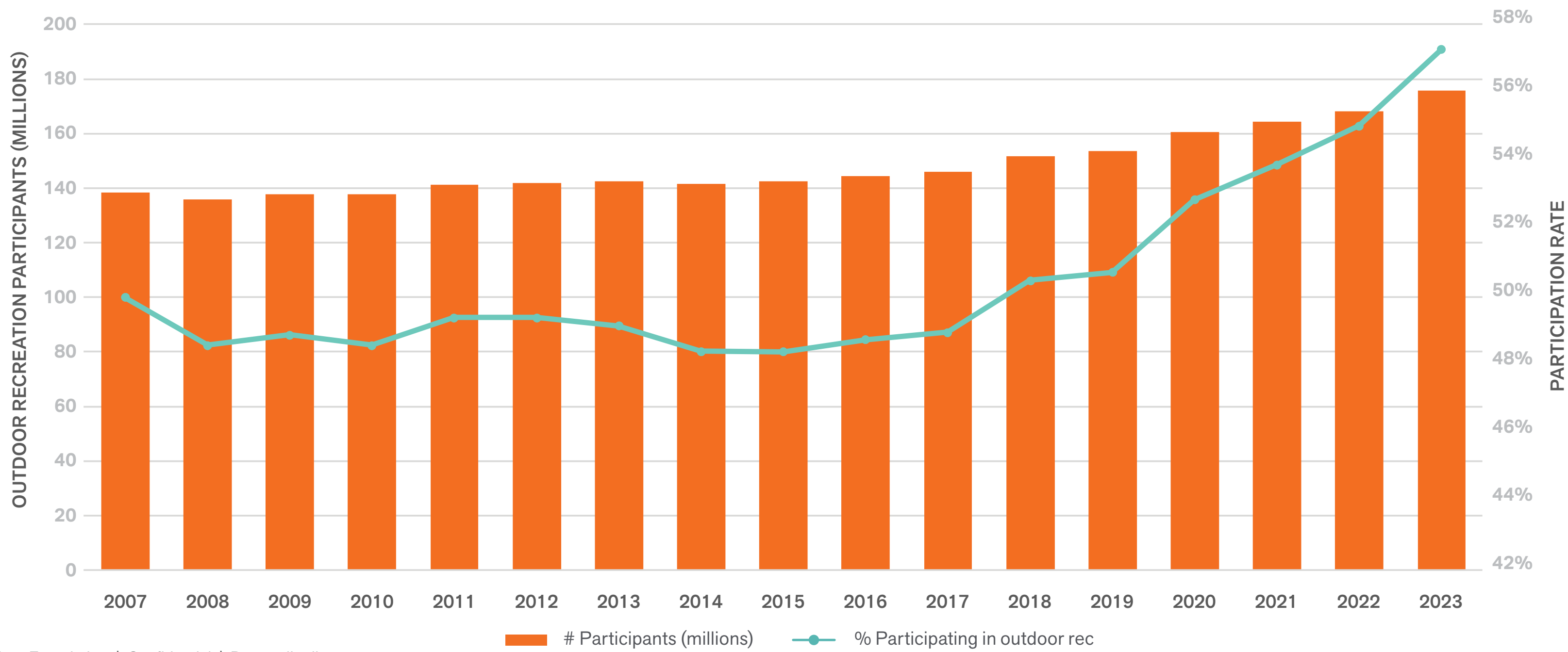
TO A RECORD 175.8 M PARTICIPANTS:

57.3% OF ALL AMERICANS AGED SIX AND OLDER.

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 (OIA), funds the research that produces the Annual Outdoor Participation Trends Report and publishes the findings in partnership with OIA every year.

OUTDOOR RECREATION PARTICIPANT COUNT AND PARTICIPATION RATE 2007 TO 2023



WHY DOES THIS DATA MATTER?

Understanding the size, demographics, and participation trends of outdoor recreationists is crucial for both outdoor brands as well as organizations and initiatives striving to promote outdoor participation. For outdoor brands, this knowledge aids in forecasting sales, allocating resources, and tailoring products and marketing campaigns to meet the diverse needs and preferences of customers. For nonprofit organizations, programs, and initiatives increasing outdoor access, this information serves as a cornerstone for gauging impact and need, designing inclusive programs, fostering engagement among underrepresented groups, and advocating for resources to advance outdoor diversity and inclusion.

By understanding the frequency of participation in outdoor activities, outdoor brands and organizations can identify opportunities to develop products, services, and programs that cater to both frequent (core) and infrequent (casual) participants, thus broadening access to outdoor recreation. The data provided in this report offers invaluable insights into the size, geographic distribution, and preferred activities of outdoor enthusiasts, serving as a primary resource for informing decision-making in both the outdoor industry and public sector.

Demographics are changing quickly in the U.S. population, and the outdoor recreation market has lagged behind. As demographics evolve rapidly, it's essential for our "outdoor ecosystem" (including outdoor industry and public sector efforts to increase participation) to work in concert to prioritize diversity and inclusivity in design, marketing, programming, outreach, and advocacy. Efforts such as the Outdoor Foundation's Thrive Outside Initiative exemplify the industry's commitment to fostering greater access to outdoor recreation for underrepresented and historically excluded individuals in collaboration with community-based efforts. In 2023, Thrive Outside Communities helped to connect over 95,000 children, youth, and families to transformative and ongoing experiences in outdoor recreation. Read more about the Thrive Outside Initiative in the Outdoor Foundation's 2023 Annual Report.

In summary, understanding outdoor participant and consumer demographics is essential for any entity aiming to succeed in today's competitive and evolving marketplace and promoting equitable access to the outdoors. By leveraging insights into the needs and preferences of their target audience, both businesses and community initiatives can create inclusive environments, foster community and brand loyalty, and drive growth in outdoor participation that promote the health of people, communities, and the outdoor industry.

KEY INSIGHTS

KEY INSIGHTS

WHAT'S UP IN OUTDOOR PARTICIPATION:

Participation in outdoor recreation grew 4.1% in 2023 to 175.8 million, amounting to 57.3% of the U.S. population. 22.2M more Americans aged six and older are participating in outdoor recreation in 2023 than were participating in 2019. (153.6M in 2019 to 175.8M in 2023)

THE IMPORTANCE OF BUILDING "CORE" STRENGTH:

The average number of outings per participant in 2023 fell 11.4% from 70.5 outings per participant in 2022 to 62.5 outings per participant in 2023. This data provides us with a leg of the triangle explaining why retail sales are down even though the number of participants increased materially.

THE DIVERSITY AND INCLUSION OPPORTUNITY:

The participant base became more ethnically and racially diverse in 2023, but not by much. 69.7% of participants are White, 10.3% are Black, 13.4% are Hispanic, 5.3% are Asian or Pacific Islander, and 1.4% identify as people with other ethnic/racial origins.



THE “CORE” DIVERSITY OPPORTUNITY:

74% of core participants are White, 8% are Black, 11.5% are Hispanic, and 5.4% are Asian/Pacific Islander people. While the number and percentage of Hispanic and Black people in the core have increased, the slower rate of increase compared to growth in the overall participant base indicates a lack of engagement in the more diverse participant base.

WOMEN AS TRAILBLAZERS:

For the first time ever, more than half of American women are participating in outdoor recreation. The female participation rate reached 51.9% in 2023, up from 50% in 2022. American males found a new level in their participation rate too, which reached a record high of 62.9% in 2023.

SENIORS DRIVE GROWTH:

The participation rates for Americans aged 55 to 64 increased from 41.2% in 2019 to 49.7% in 2023; those 65 and older increased from 28.8% in 2019 to 39.5% in 2023. The participation rate for Americans aged 65 and older grew 11.5% between 2022 and 2023 alone.




LGBTQ+ BREAKING DOWN BARRIERS:

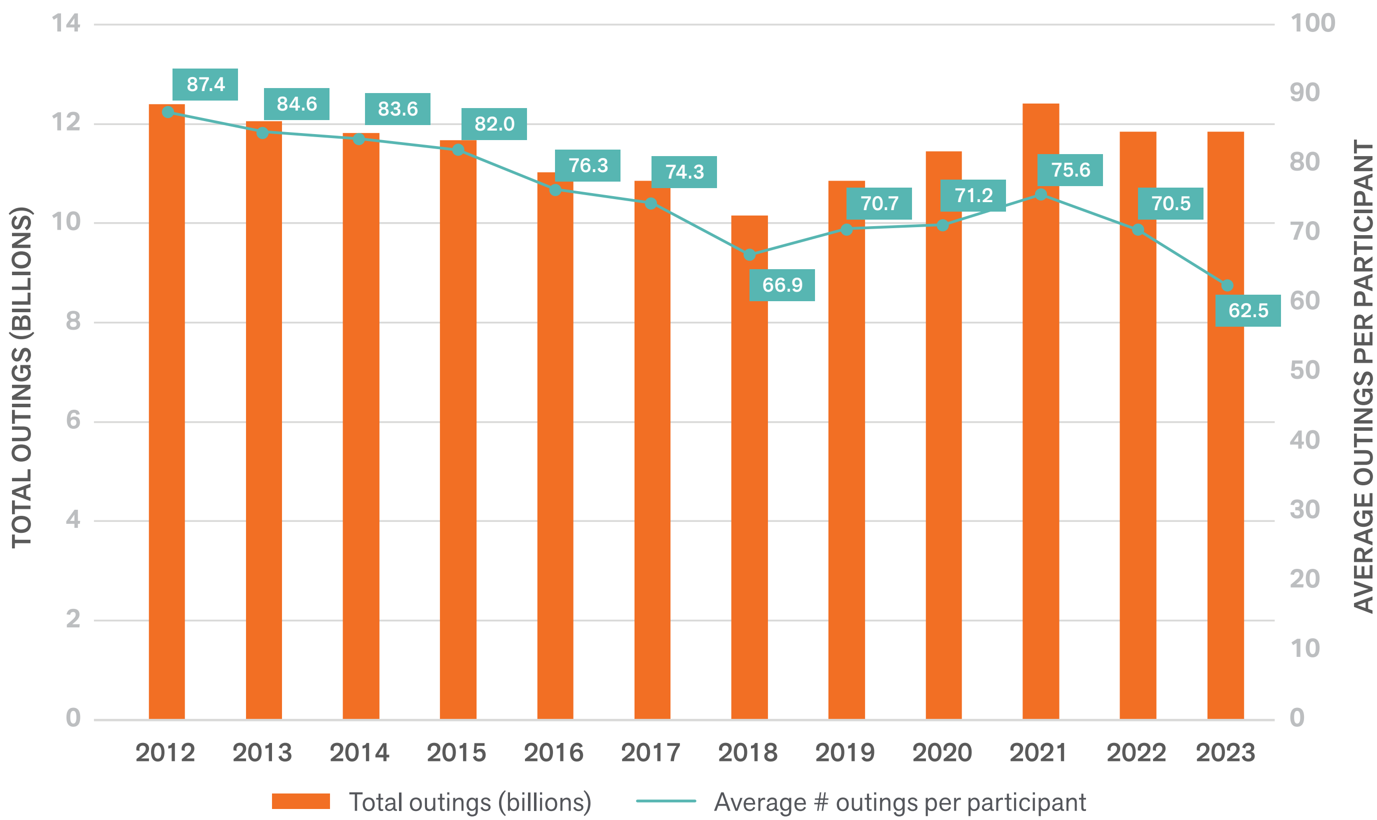
Members of the LGBTQ+ community make up 11.3% of the outdoor participant base (19.9M) and continue to be the most active adult cohort in outdoor recreation with total participation rates above 60%. At 65.6%, people who identify as Bisexual had the highest participation rate of any adult cohort.

WHAT'S UP – AND WHAT'S DOWN – IN OUTDOOR PARTICIPATION

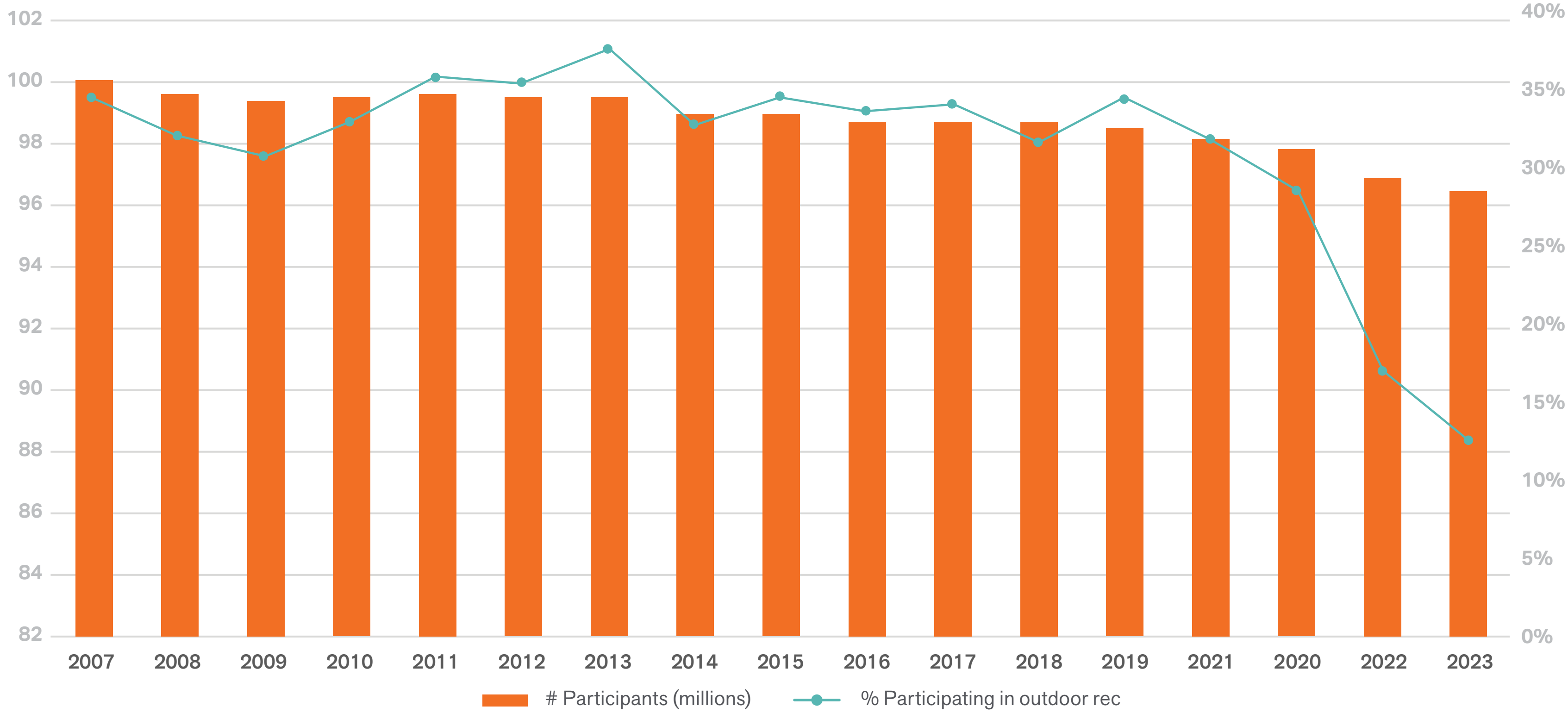
The good news: More people than ever are getting outside and recreating.
The bad news: They are participating less frequently.

Although the number of outdoor recreation participants has increased significantly, the number of outdoor outings has remained relatively flat over the past decade. Over the same ten-year period that we have seen record growth in the number of outdoor recreation participants, the frequency of participation has fallen significantly. Ten years ago, the average number of outdoor outings per year was 84. In 2023, the average had slipped to 62.5 per year.

TOTAL OUTINGS AND AVERAGE OUTINGS PER PARTICIPANT 2012 TO 2023



COUNT AND AVERAGE PERCENTAGE OF CORE (VERY FREQUENT) PARTICIPANTS 2007 TO 2023



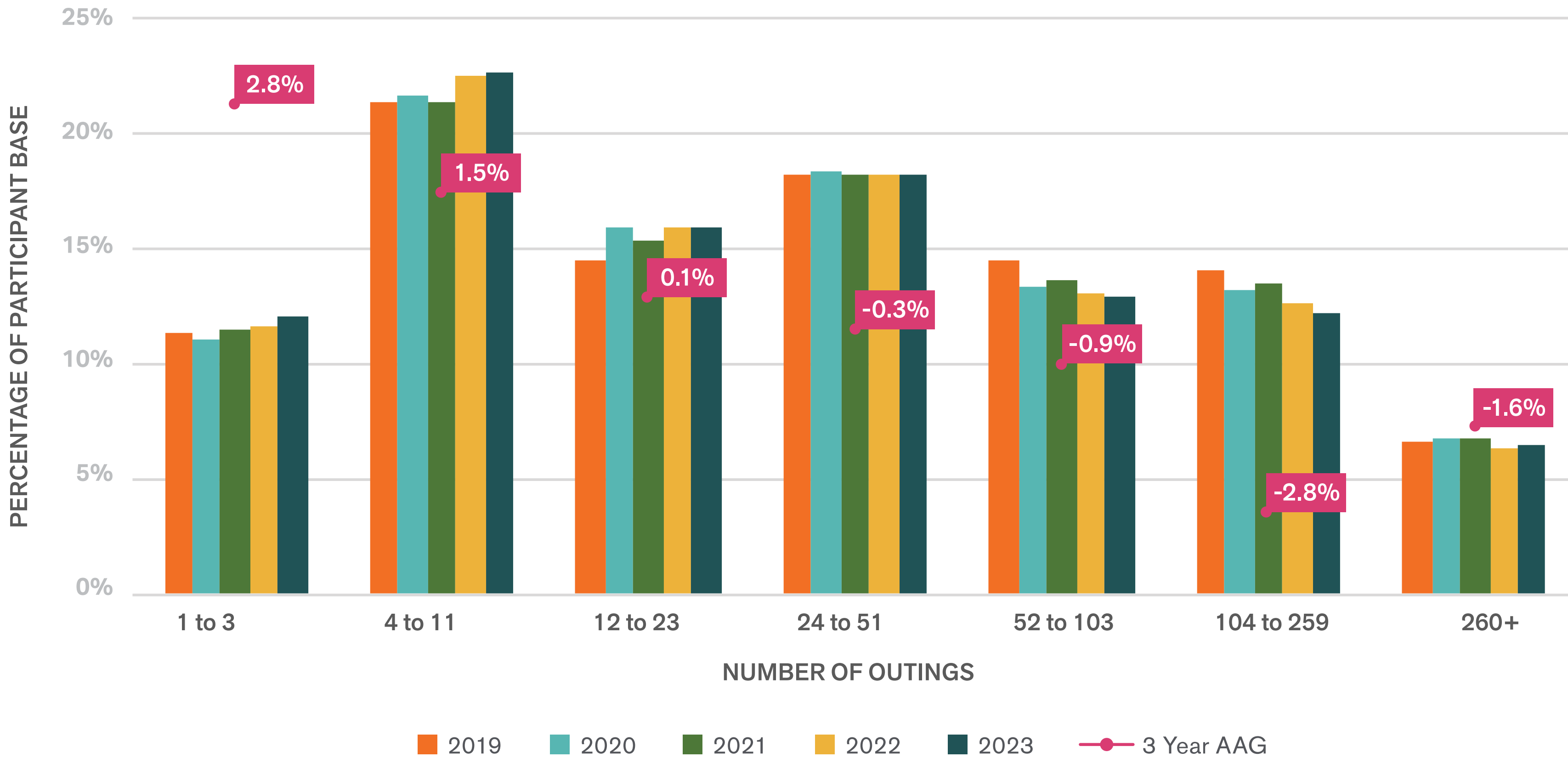
Both the count and the average percentage of core (very frequent) participants in outdoor recreation activities show a long decline. In 2023, 88.4 million outdoor participants were core participants in at least one activity, down from a recent peak in 2019 of 99.4 million core participants. The average percentage of core participants in each outdoor recreation activity measured was 28.8% in 2023, down from a recent peak of 33.2% in 2018. (Note that the percentage of core participants is not calculated by dividing core participants by total participants (88.4M/175.8M). The percentage of core participants is an average of the percentage of core participants in each activity.)

Some of the precipitous drop in the average percentage of core participants in outdoor activities between 2020 and 2023 is explained by an influx of new participants, but the actual count of core participants is dropping. When the drop in the actual number of core participants is coupled with significant growth in the number of total participants, we know that new participants are participating less frequently.

The decline in the frequency of outings is concentrated in the highest frequency-of-outings categories. Declines begin showing in the 24-to-51-outings-per-year category, with the sharpest declines in the 104-to-259-outings-per-year category and the 260-or-more-outings category. Notice the increase in the low-frequency (1-to-3 and 4-to-11-outings-per-year) categories. There are more casual participants in the low-frequency categories and fewer participants in the high-frequency categories, perfectly illustrating the decline of the core participant base and the growth and dominance of the casual outdoor recreation participant.

TRENDS IN OUTINGS FREQUENCY FOR ALL OUTDOOR RECREATION PARTICIPANTS 2019 TO 2023 WITH THREE-YEAR AVERAGE ANNUAL GROWTH (AAG)/CHANGE

This data on the declining frequency of participation is a flashing red light in the outdoor market; it warns us that we are losing committed participants and reliable consumers of outdoor products.

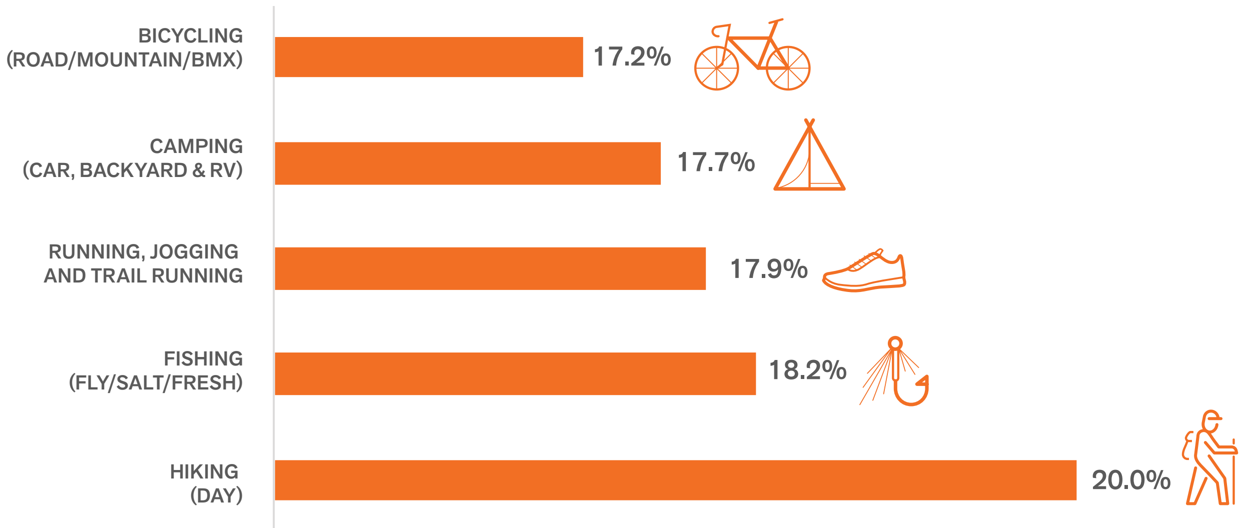


THE OPPORTUNITY TO ENGAGE DIVERSE CASUAL PARTICIPANTS

The data on declining frequency of participation indicates significant opportunities to engage millions of new participants and even incentivize them to participate more frequently.

This data indicates that currently, very few participants who are new to outdoor recreation are converted to core participants. It isn't hard to identify the potential for growth when you do an analysis on the outdoor participant base — there is a more diverse group of Americans who are casual participants in the most accessible activities, such as hiking, running, camping, bicycling, and fishing.

2023 TOP FIVE OUTDOOR RECREATION ACTIVITIES BY PARTICIPATION RATE (% OF THE TOTAL POPULATION AGED SIX AND OLDER)



The typical participant in this new casual group might hike or fish while they're camping over a weekend, then go for a few bike rides with friends over the course of a year. There are many opportunities to engage casual participants to participate more frequently. Further engagement of new participants requires us to get to know them better and learn more about their motivation for participation in outdoor recreation activities.

We know they are not out there perfecting turns on their skis, through-hiking the PCT, or setting the fastest time running the Grand Canyon rim to rim. What makes this group different, and how will they drive change in the overall outdoor participant base? This report explores this new participant: their diversity, their participation preferences, how often they like to participate, what barriers they face to do so, and why they continue to flock to outdoor spaces four years after the pandemic that accelerated participation growth across outdoor recreation.

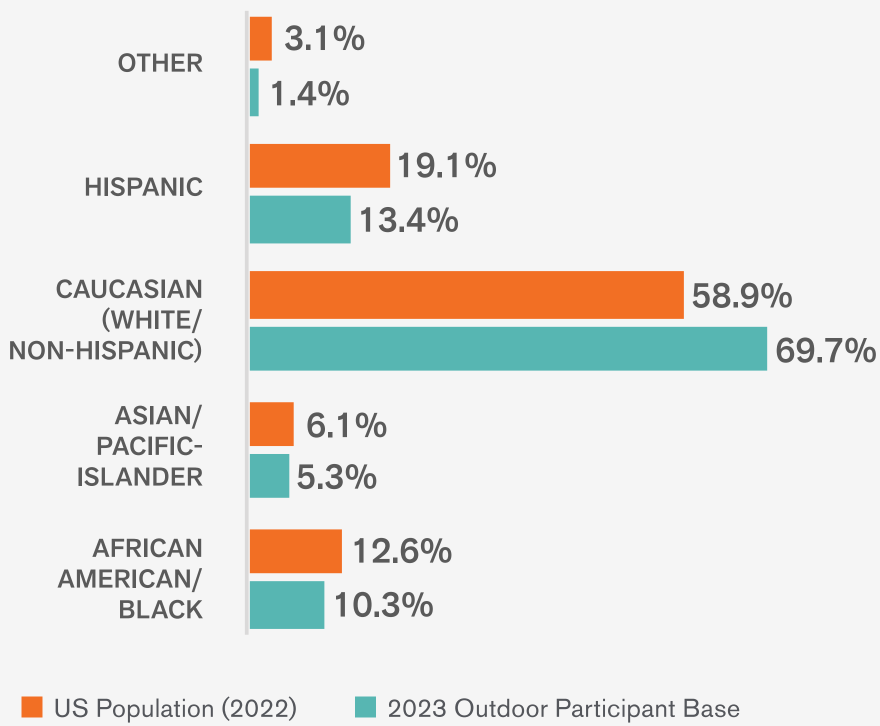
AT A GLANCE: DIVERSITY IN OUTDOOR PARTICIPATION

Increasing numbers of participants of color are driving diversity across ethnic/racial categories in outdoor recreation.

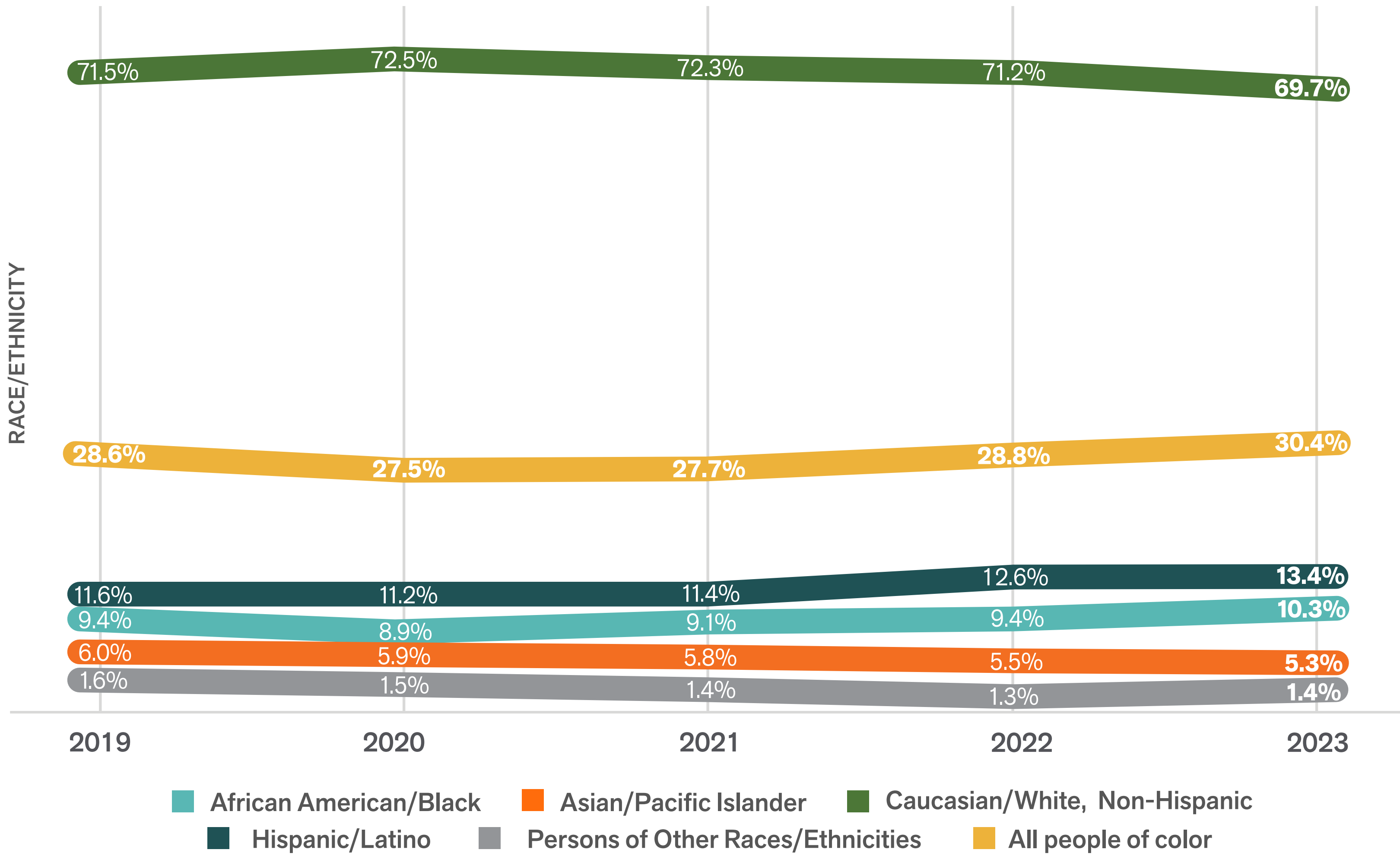
The percentage of outdoor participants who are Black increased from 9.4% to 10.3% of the outdoor participant base in 2023. The percentage of Hispanic people in the outdoor participant base increased from 12.6% in 2022 to 13.4% in 2023. In 2023, the percentage of White Non-Hispanic people in the outdoor participant base decreased from 71.2% in 2022 to 69.7%.

Growing ethnic/racial diversity in the overall population is mirrored by growing diversity in the outdoor recreation participant base.

ETHNIC/RACIAL DIVERSITY IN THE OUTDOOR RECREATION PARTICIPANT BASE AND THE U.S. POPULATION

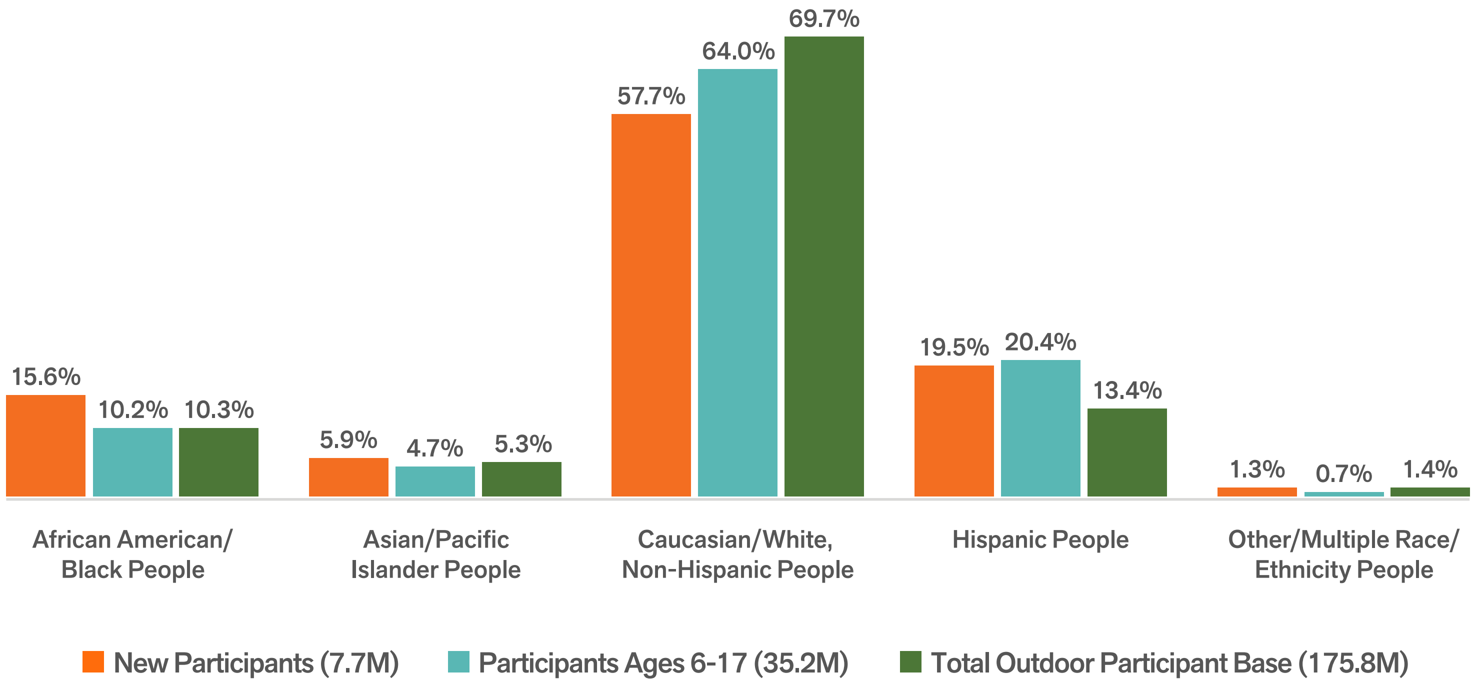


OUTDOOR PARTICIPATION BY RACE/ETHNICITY 2019 TO 2023



The injection of more diverse participants new to outdoor recreation and youth participants entering the participant base is not merely a trend; it's destiny. Shifting demographics, especially along ethnic/racial categories, is happening in the general population of the United States. In fact, the outdoor recreation participant base is less diverse than the U.S. population overall.

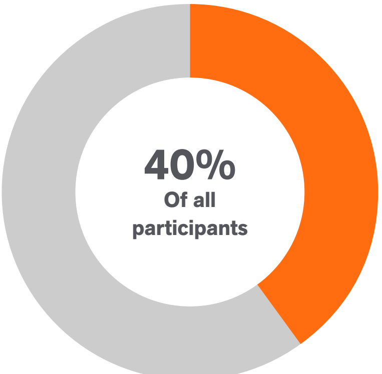
DIVERSITY IN THE 2023 OUTDOOR RECREATION PARTICIPANT BASE - TOTAL BASE, AGES 6-17 YEARS, AND NEW PARTICIPANTS

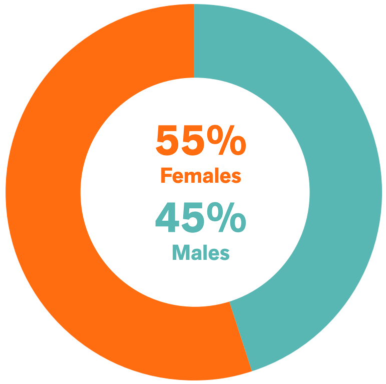


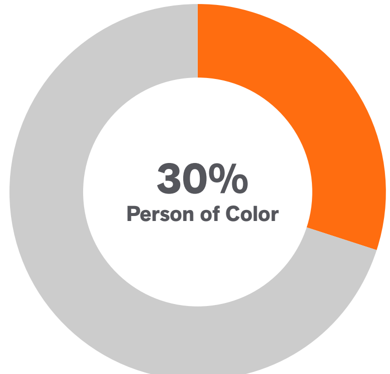
Diversity brings new participants, new ideas, and new ways of engaging outdoors, more support for outdoor and environmental policies, and more dollars into the outdoor recreation market.

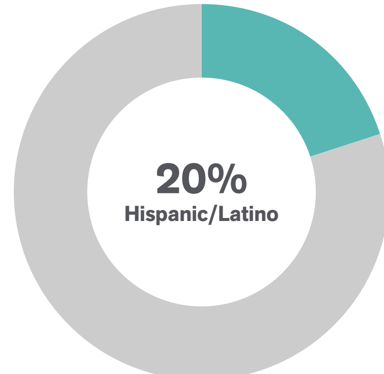
In this report, we will dive deeply into demographic shifts, trends in the declining frequency of participation, and the growth or decline of participation across outdoor recreation activities. Our overarching objective is to provide a clear view of the outdoor recreation participant base and offer insights on how to continue growing the number of participants and take advantage of opportunities to increase the frequency of participation. More people partaking more frequently provides a higher level of support for outdoor recreation causes, like climate change mitigation and protection/expansion of public lands, as well as more spending in the outdoor market.

CASUAL OUTDOOR PARTICIPANT PROFILE









Started participating in outdoor recreation activities in **2020** or later

Participates casually in at least **1-5 activities**

Motivated to get outdoors to spend time with friends/build community, boost mental health, connect with nature, and have awe-inspiring experiences (especially shareable ones)

Probably started with hiking, camping, fishing, cycling, and/or running

Older participants likely to gravitate to wildlife viewing, birding, and/or fishing

Participate in outdoor activities
4 to 24 times a year

<24 | **55+**

Likely to be either 24 or younger or 55 and older

Not interested in high tech gear, perfecting outdoor skill sets, winning races, setting speed records

IN PLAIN LANGUAGE: DEFINITIONS AND TERMINOLOGY

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out·doors /ˈaůt-ˈdȯrz/
the natural world; any environment beyond the confines of built infrastructure, typically characterized by natural landscapes, fresh air, and exposure to weather elements.

outdoor recreation /ˈaůt-ˈdȯr ˌre-krē-ˈā-shən /
Any leisure or recreational activities that take place in natural environments or outdoor settings. Note that this report more narrowly focuses on contemporarily defined, and mostly human-powered, outdoor activities, and is not exhaustive of the diverse ways people recreate in the outdoors.

participant /pär-ˈti-sə-pənt/
A survey respondent who reported participating in at least one outdoor activity in calendar year 2020. Participants often reported undertaking multiple activities multiple times throughout the year.

participation rate /pär-ˈti-sə-pənt ˈrāt/
The proportion of a group who participated in outdoor recreation or an outdoor activity. For example, if 6 in 10 teenagers bicycled in 2020, their bicycling participation rate was 60 percent.

core participant /ˈkȯr pär-ˈti-sə-pənt/
A person who takes part in outdoor activities 51 times or more in a year.

outing /ˈaui-tiŋ/
A single trip during which outdoor activity was undertaken.

CONCLUSION

CONCLUSION: THE OPPORTUNITIES AND THE TRENDS TO TRACK

The data is more than a mere snapshot of what's happening in outdoor recreation — it can inform the road map we create to pave a healthier future for participants, our community and the industry.

The outdoor recreation participant base was healthy in 2023. There were 175.8M participants, a 4.1% growth in the number of participants, increasing diversity, and strong growth in the most popular outdoor activities (hiking, camping, fishing, bicycling, and running).

At a 57.1% participation rate, a larger share of all Americans participate in outdoor recreation than see a movie in a theater (43%), possess at least an associate degree (52.5%), or eat breakfast daily (35%). Outdoor recreation can shoot for participation rates as high as the percentage who follow professional and/or college sports (62%), are on social media (68%), or drink coffee every day (73%).

However, a sharp drop in the frequency of participation is a flashing red warning light for the outdoor industry and a call to opportunity. Considering the growth in the number of Americans from all demographic groups participating in outdoor recreation, focusing on engagement that increases the frequency of participation could pay large dividends in the future.

Efforts to better segment the outdoor participant base as it transitions to a more diverse, more casual base of participants will help the industry better understand participants who approach outdoor recreation with more relaxed attitudes and expectations. The traditional hard-core, high-frequency participants, who are most often male and white, will make up a smaller share of the participant base year-over-year into the indefinite future. Efforts to build core participation in a more diverse market will be key to growing outdoor participation in depth as well as breadth.

This report focuses on detailing how many Americans are participating in outdoor recreation and aspects of their identity, including age, sex, geographic location, education, income, and frequency of participation across outdoor recreation activities from adventure racing to wake surfing.

The data produced by the Physical Activity Council does not explain why these trends are happening. It is up to both OIA Research and market researchers across the outdoor industry to look deeper into consumer intelligence resources to determine why trends occur and where they are likely to head in the coming years. Businesses that do this work will have a significant competitive advantage. Additionally, organizations that get people outdoors as either a primary or secondary goal should also look deeper into consumer intelligence offered by OIA Research and other resources in their communities to maximize their efforts.

METHODOLOGY

METHODOLOGY

All participation statistics are from a nationwide study conducted during the 2023 calendar year by Sports Marketing Surveys USA (SMS). Under the guidance of the Outdoor Foundation, the Sports and Fitness Industry Association (SFIA), and six 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. This survey began in 2007.

SAMPLE SPECIFICATION

During 2023, a total of 18,000 online interviews were carried out with a nationwide sample of individuals from U.S. proprietary online panels representative of the U.S. population for people aged six and older. Strict quotas associated with gender, age, income, region, and ethnicity were followed to ensure a balanced sample.

The 2023 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: the degree to which the results might differ from those obtained by a complete census of every person in the U.S. 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 U.S. population over six years old. 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 six and older.

Activity reported 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.

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