

A man in a blue puffer jacket and waders is fishing in a river. He is holding a fishing rod and reel, and a net is visible behind him. The background shows a rocky riverbank with some vegetation.

2023 OUTDOOR PARTICIPATION TRENDS REPORT

EXECUTIVE SUMMARY AND KEY INSIGHTS

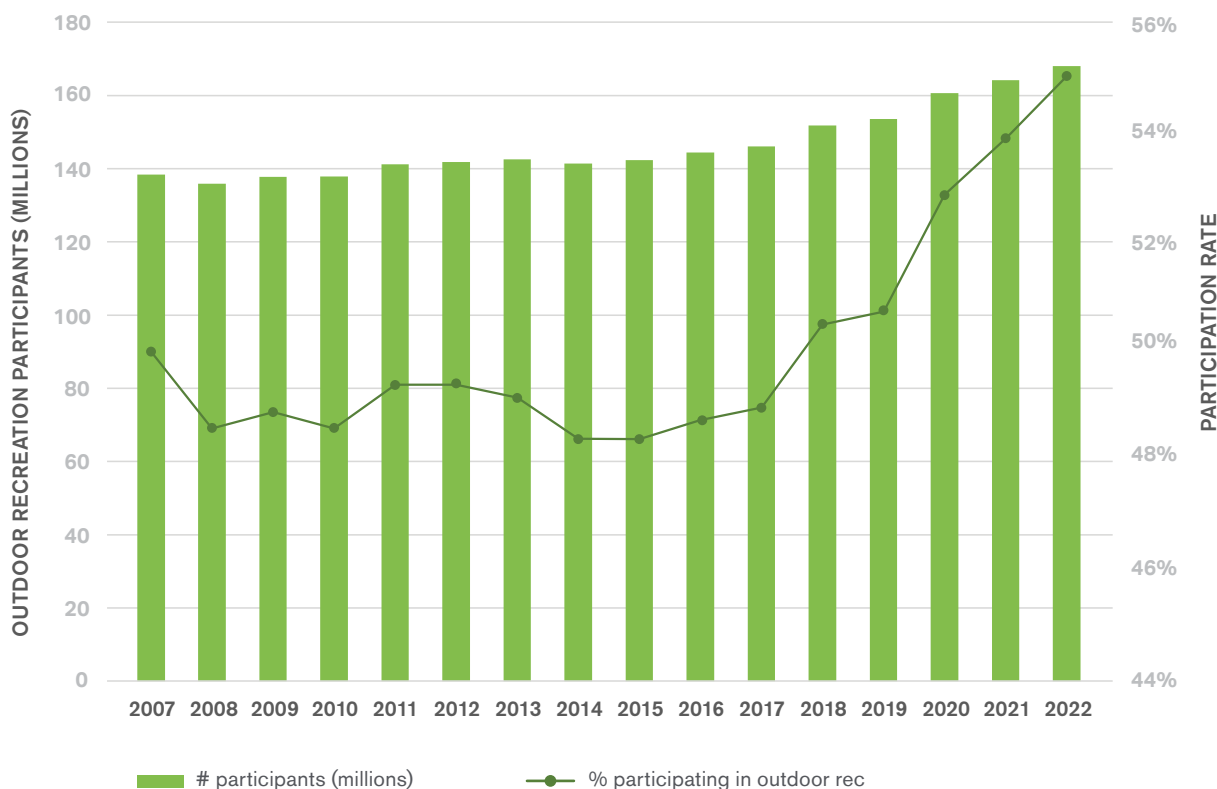
TABLE OF CONTENTS



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

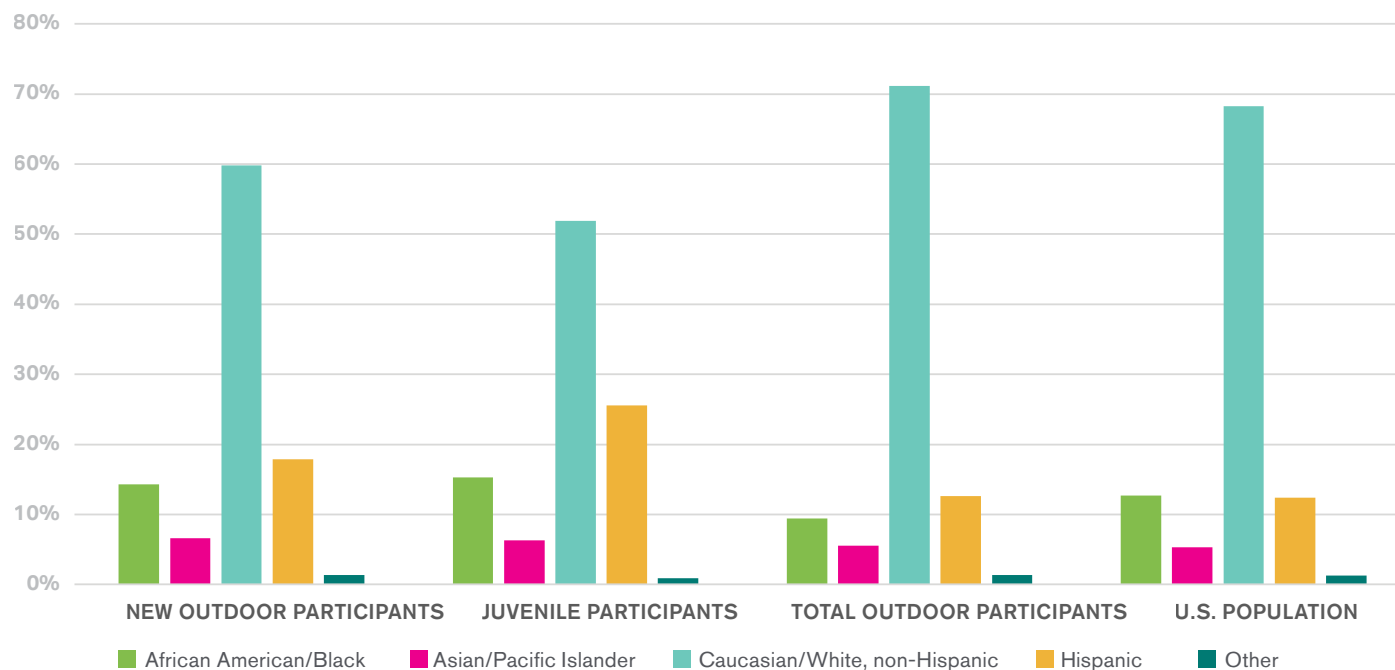
A high-level overview of 2022 research into recreational participation reveals greater diversity and more young people; the most popular activities and those that are declining; and the average number of outings per participant. See many more specific pieces of information in the meat of the report.

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:



22.9%

GROWTH IN CAMPING TO
51.4 MILLION CAMPERS



22.9%

GROWTH IN HIKING TO
59.6 MILLION HIKERS



22.9%

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



22.9%

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



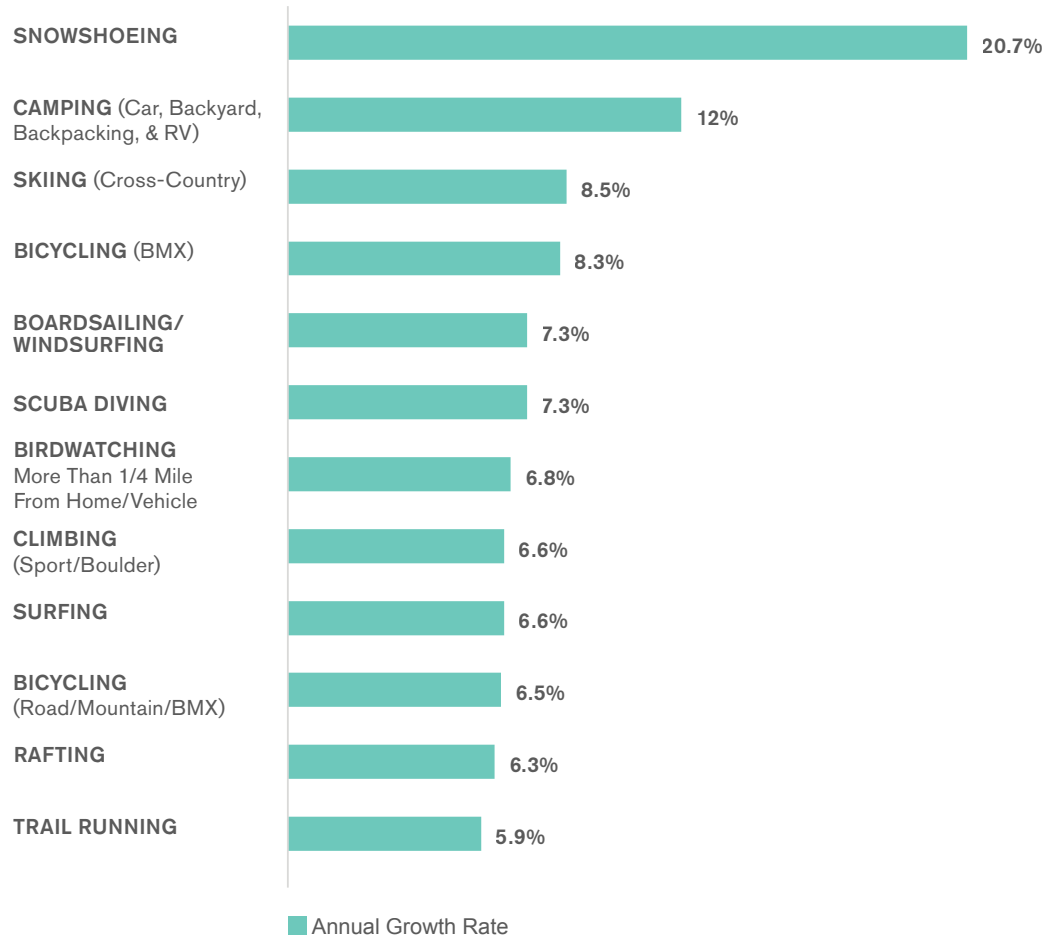
8.3%

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.

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.



DEFINITIONS AND TERMINOLOGY

PARTICIPANT

A survey respondent who reported participating in at least one outdoor activity in calendar year 2022. Participants often reported undertaking multiple activities multiple times throughout the year.

PARTICIPATION RATE

The proportion of a group that participated in outdoor recreation or in an outdoor activity. For example, if six in 10 teenagers bicycled in 2020, their bicycling participation rate was 60 percent.

CORE PARTICIPANT

A person who participates in outdoor activities 51 times in a year or more.

OUTING

A single trip during which outdoor activity was undertaken.



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

OUTDOORINDUSTRY.ORG

