



**OUTDOOR
INDUSTRY[®]**
ASSOCIATION



State of the Outdoor Market

November 2024

A person wearing a blue jacket and dark pants is running away from the camera on a paved path in a park. The path is lined with bare trees, and the scene is captured in a soft, hazy light, possibly during sunrise or sunset. The text is overlaid on the image in a bold, orange font.

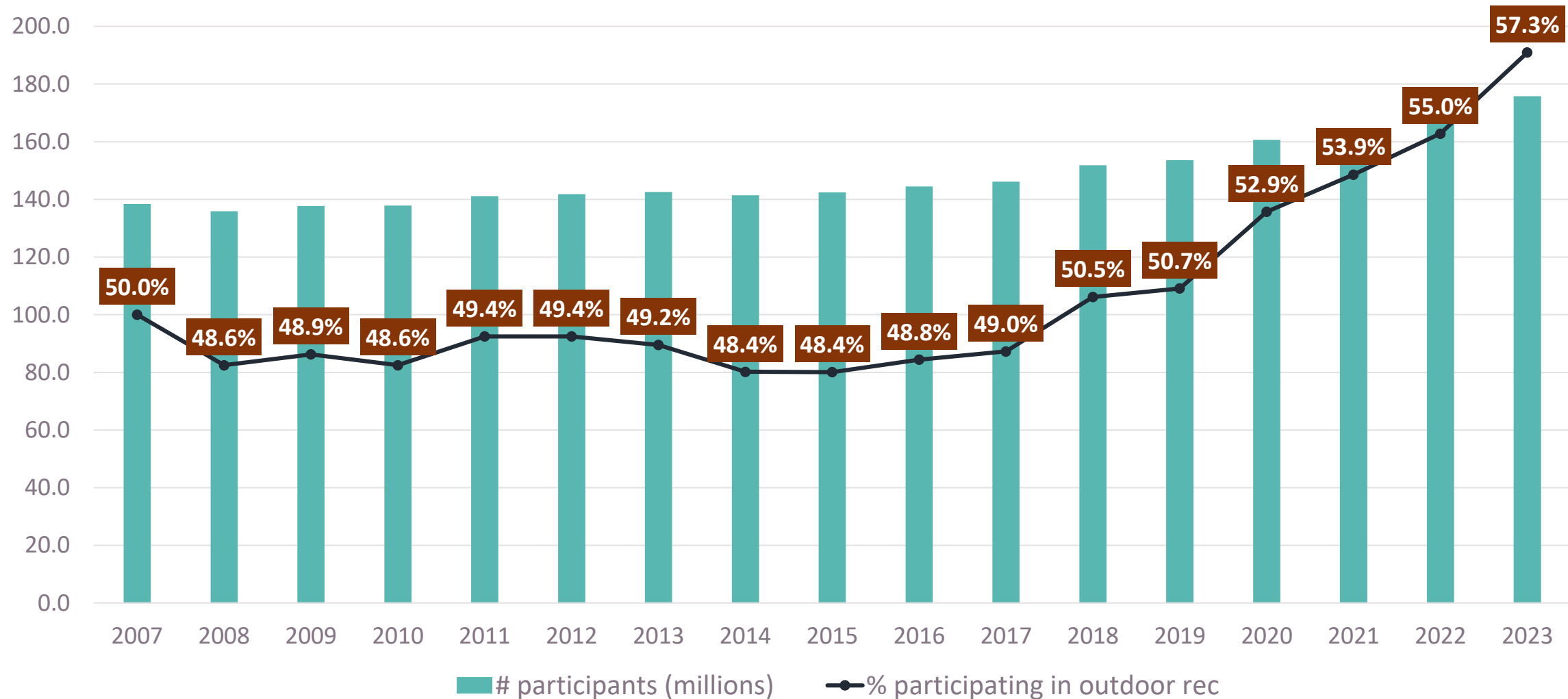
175.8 Million Participants

22.2 Million More Participants since 2019

57.3% of Americans Ages 6 and Older

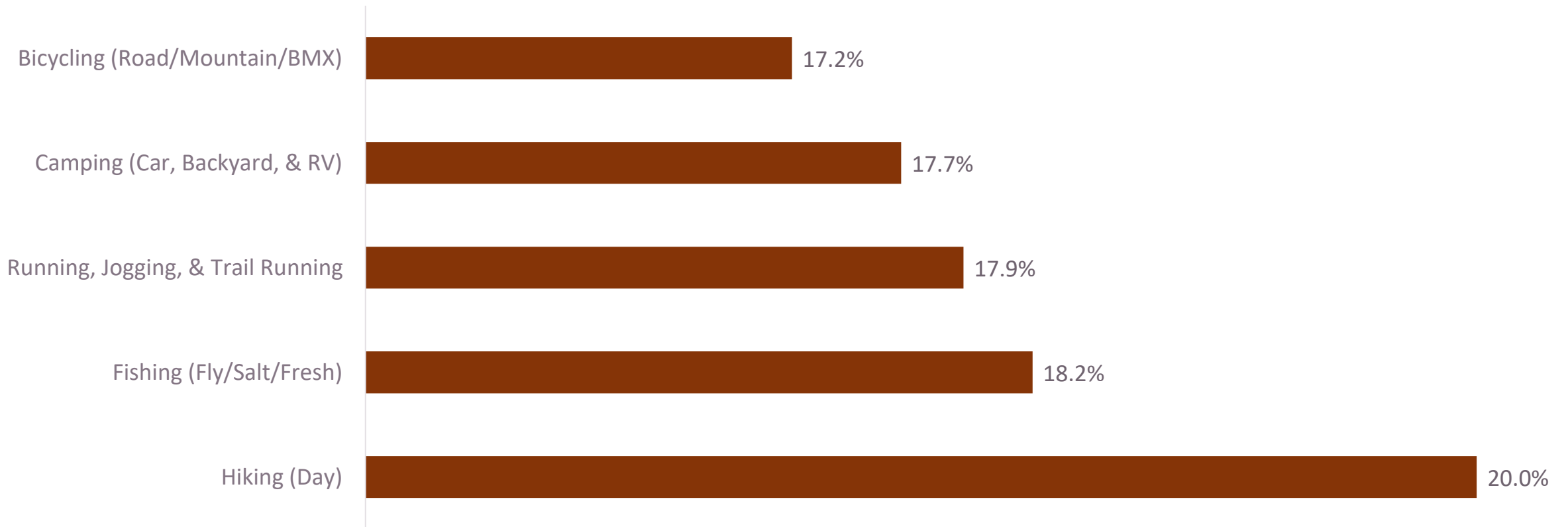
Highest Outdoor Participation on Record

Outdoor Recreation Participation Rate and Count 2007 to 2023



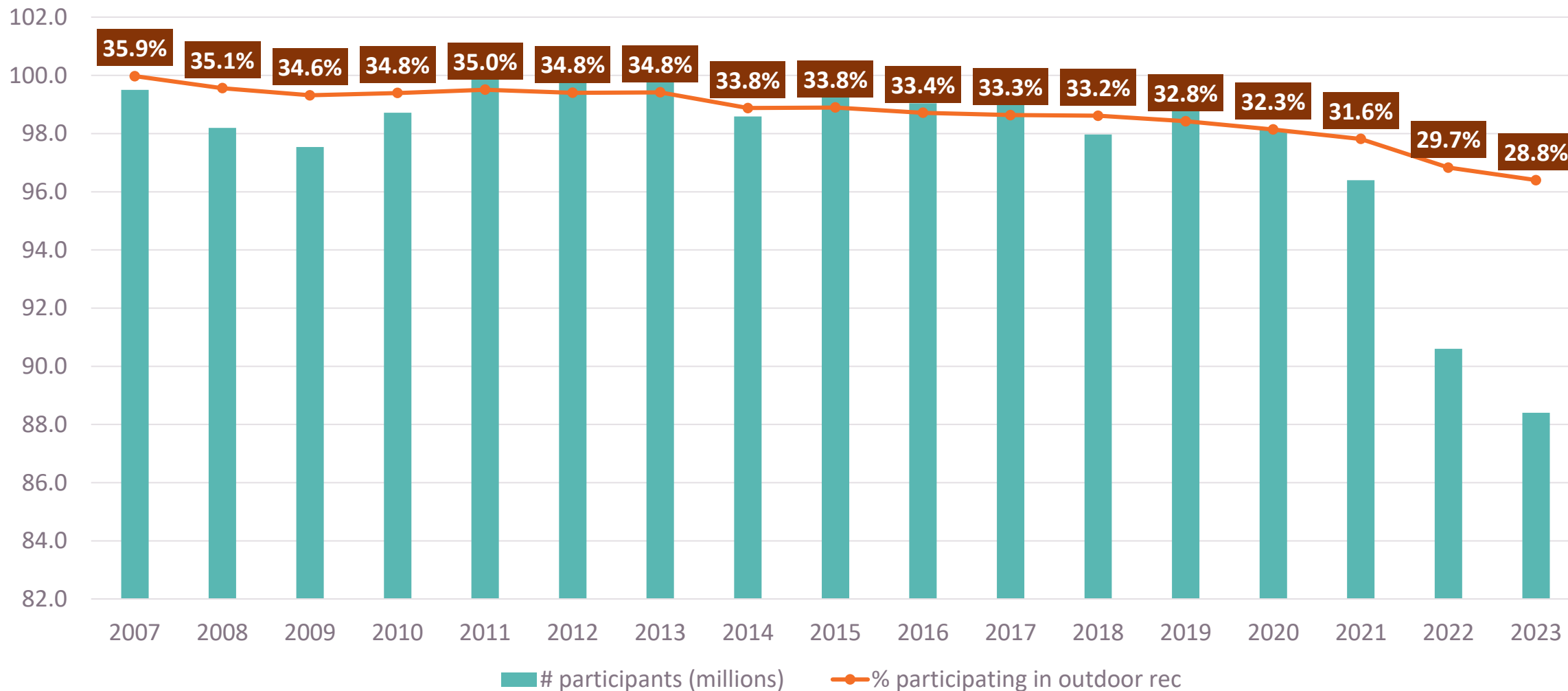
Most Popular Activities

2023 Top Five Outdoor Recreation Activities by Participation Rate
(% of the Total Population Ages 6 and Older)



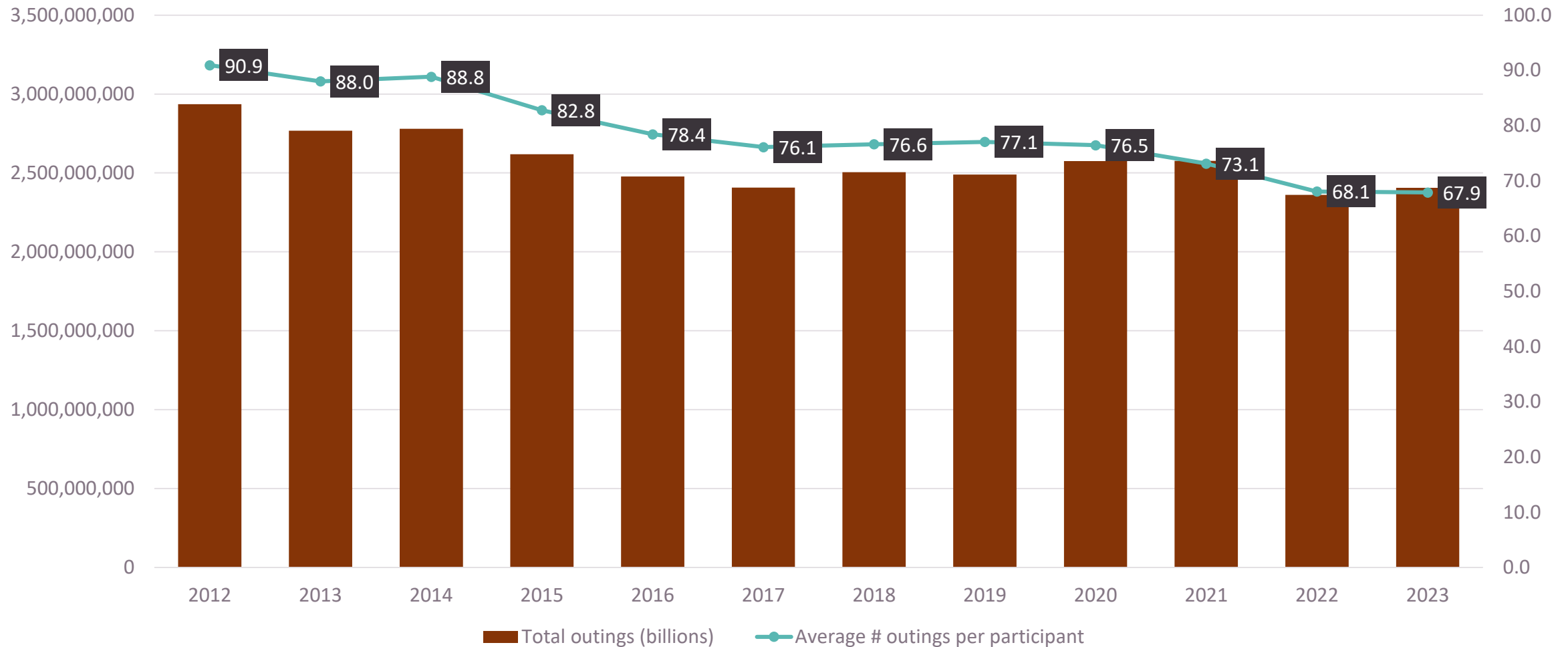
Opportunity for a New Generation of Enthusiasts

Core Participation Rate and Count of Participants 2007 to 2023



Outdoor Youth

Youth Outings and Average Outings per Participant 2012 to 2023

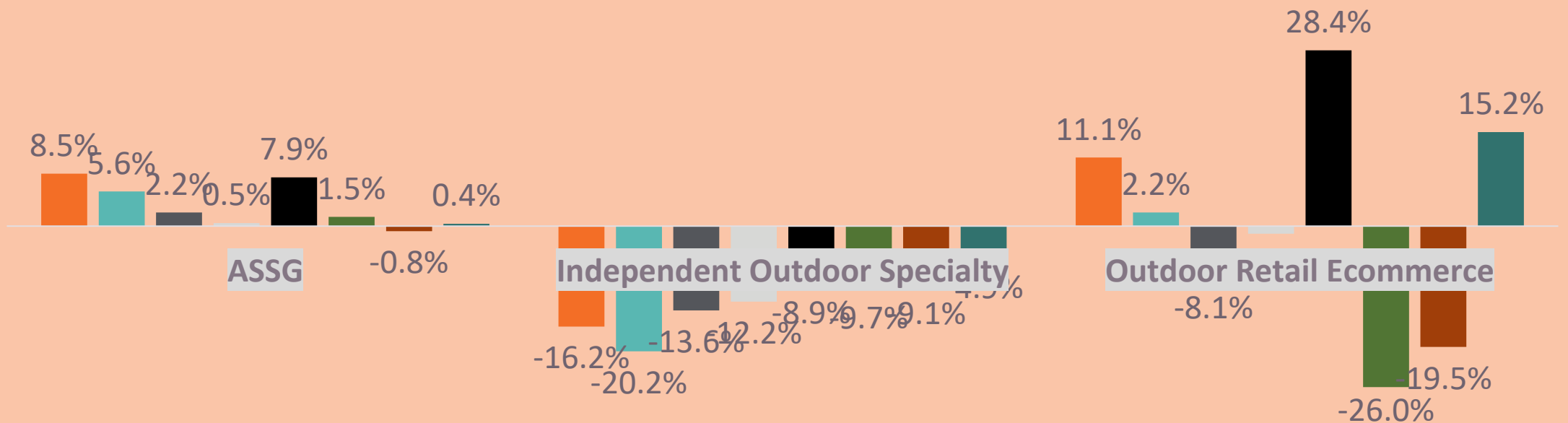


The Outdoor Retail Environment

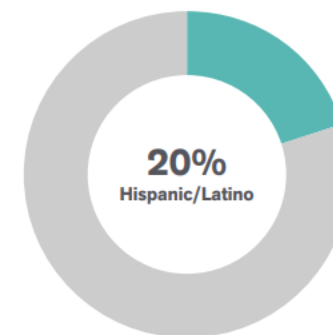
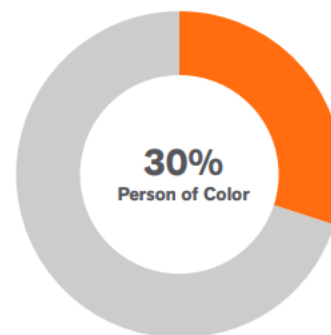
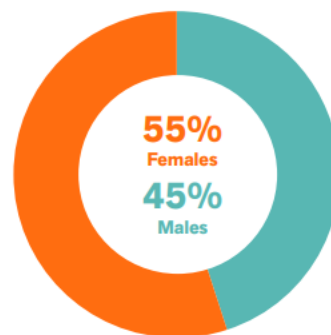
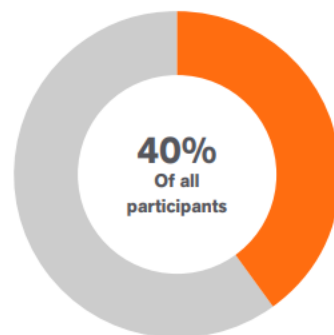
Independent Specialty Retailers Losing Sales

Dollars Sold Growth/Change by Outdoor Sales Channel January to August
2024

January* (adjusted) February March April May June July August



CASUAL OUTDOOR PARTICIPANT PROFILE



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

Has the typical motivation to participate in Outdoor Recreation Shifted?

Classified as a strong investment case in our [Future of Outdoor](#) report, **WGSN** analysis suggests the outdoor trend will have consumer longevity that will continue to impact multiple industries. As this lifestyle continues to gain consumer traction, we forecast new outdoor recreational activities set to provide opportunity which will in turn expand product categories, influence product development and outline new models of inclusion.

Outdoor Recreation and Mental Health

49% of Adults in the U.S. report frequently experiencing stress, up 16 points over the past two decades and the highest in [Gallup's trend to date](#).

47% of youth surveyed reported feeling “down, depressed. Or hopeless” and 55% reported feeling “anxious, nervous, or on-edge” ([42nd Annual Harvard Youth Poll](#))

Most youth (87.8%) want to spend more time in nature. Among youth, many felt that spending time in nature positively impacted their mental health, with 51.6% mentioning that it made them “feel calm when I am out in nature” ([BMC Public Health, Article number 1586 \(2021\)](#))

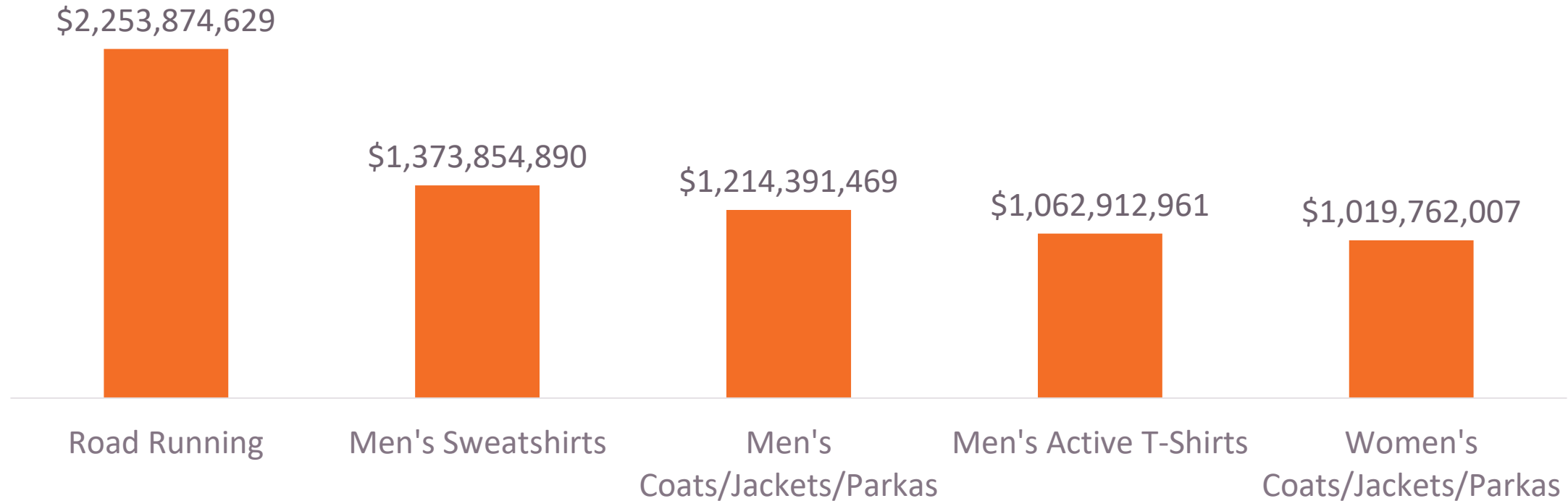
Outdoor activity works! A 2023 study published in [Neuroscience News](#) found that a twenty-minute nature experience was enough to significantly reduce cortisol levels. But if you spent a little more time immersed in a nature experience, 20 to 30 minutes sitting or walking, cortisol levels dropped at their greatest rate.

Outdoor Retail Sales Trends

Top Selling Product Categories

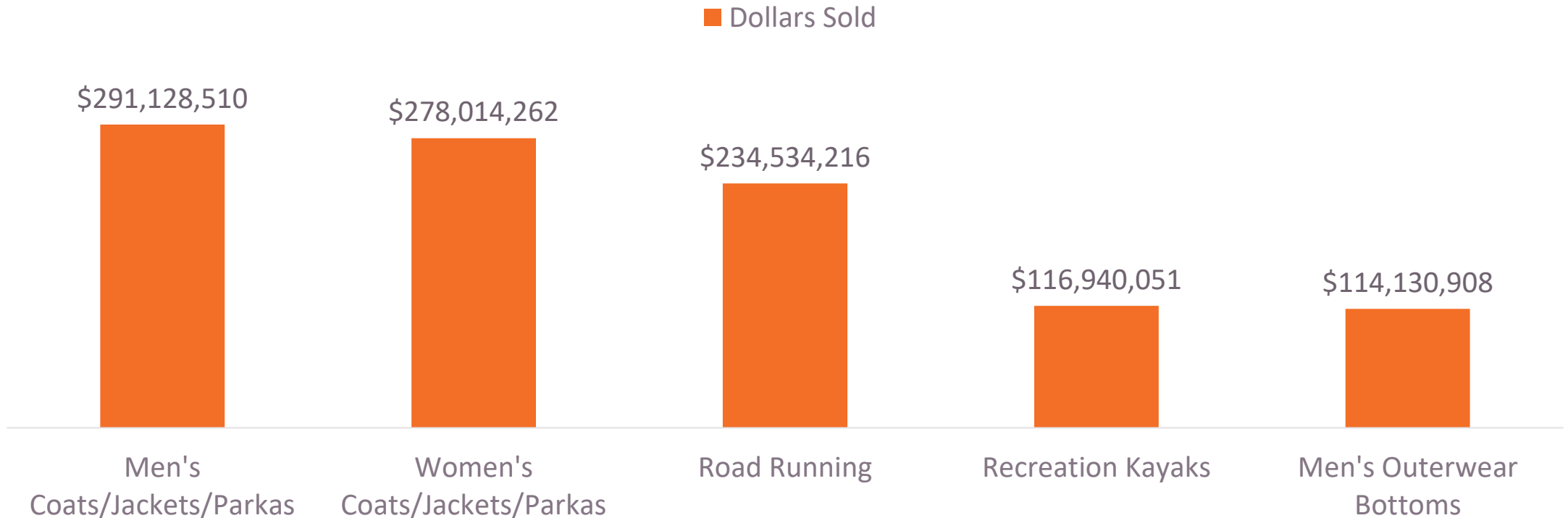
Top Selling Outdoor Retail Categories September 2023 to August 2024

■ Dollars Sold Septmeber 2023 to August 2024



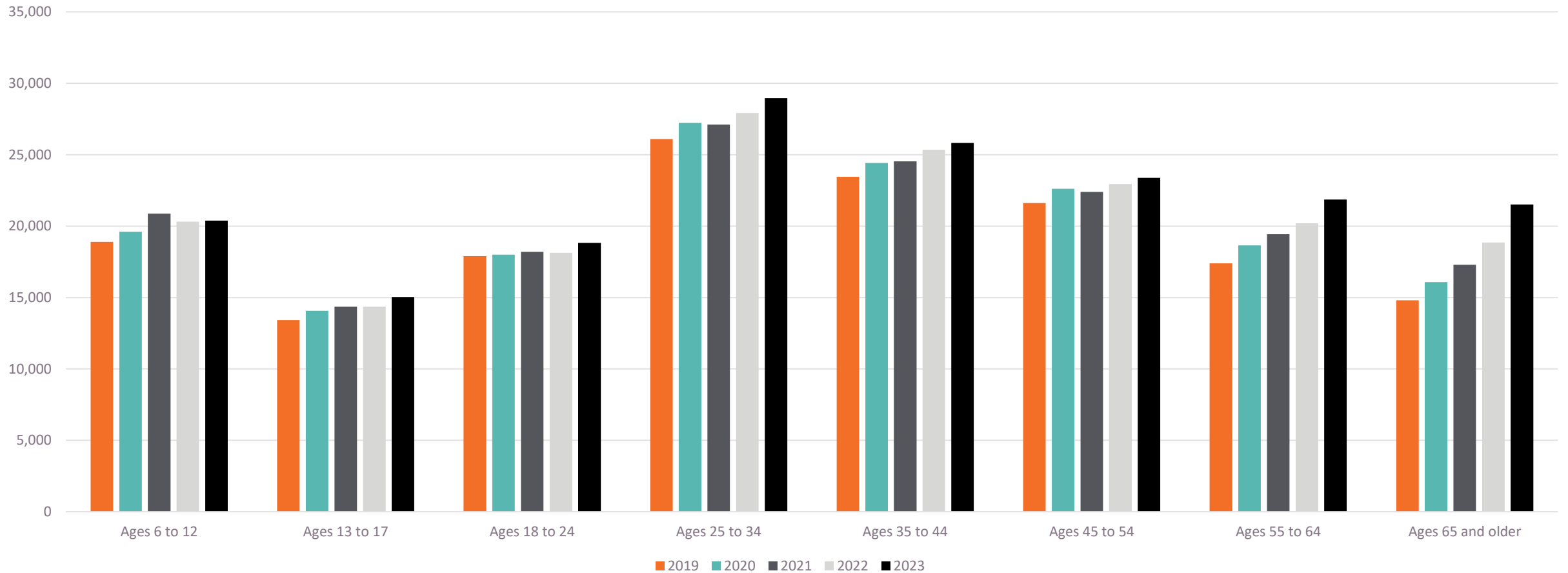
Top Selling Product Categories in Independent Specialty

Top Selling Outdoor Product Categories in Independent Outdoor Specialty Retail
September 2023 to August 2024



Outdoor Seniors

Outdoor Recreation Participation Count by Age Group 2019 to 2023



The Future

- **Trade Policy and Prices**
 - **Public Lands**
 - **Climate Change**
- **Growth and Diversity**

Thank You!

Questions!

Thank You!

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