

A SPECIAL REPORT ON TRAILRUNNING 2010



A Partnership
Project of:



TRAIL RUNNING

Trail running offers a uniquely rewarding outdoor experience that gives participants an opportunity to stay fit and escape the built environment of many urban and suburban communities. With increasing visibility in recent years, trail runners are hitting their stride in city parks, on

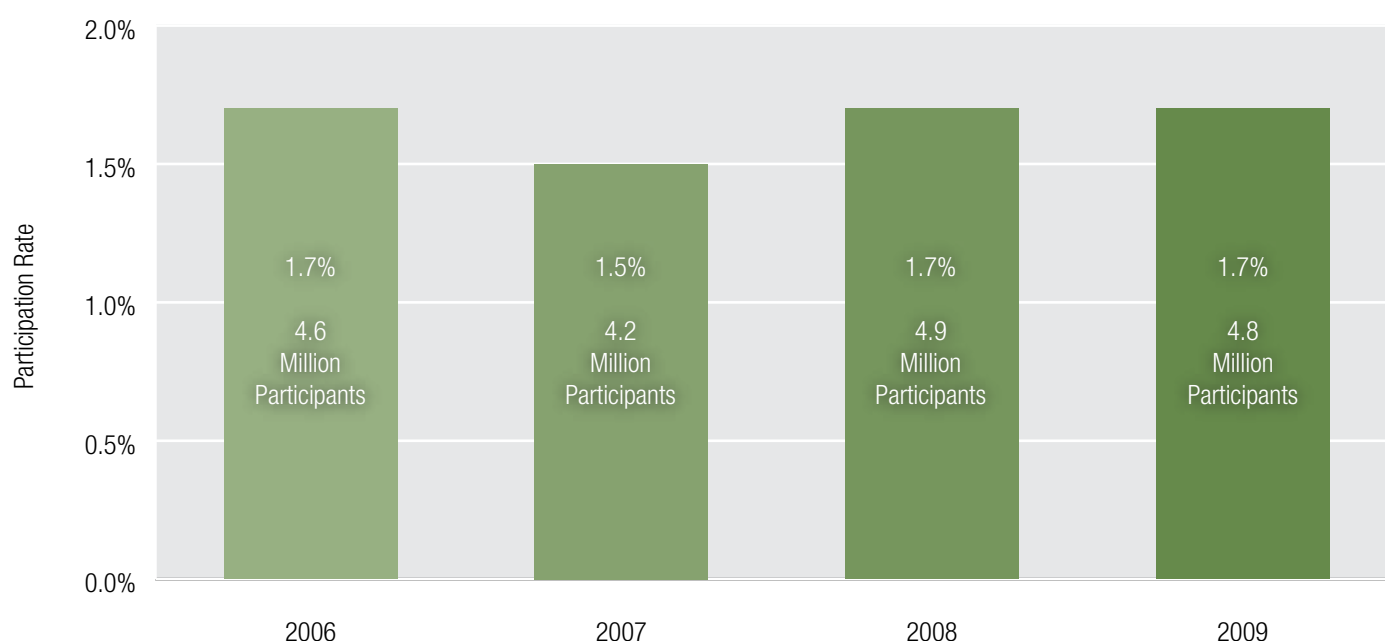
suburban walking paths and on wilderness trails across the country.

In 2009, this activity attracted 4.8 million participants. These participants averaged 31.8 trail running days each for a total of 153.7 million outings. This special

report gives an overview of trail running in the United States, presenting detailed information on participation by gender, age, ethnicity, income, education and geographic region. Data is also provided on common barriers to entry as well as popular “crossover” sports for this important group.

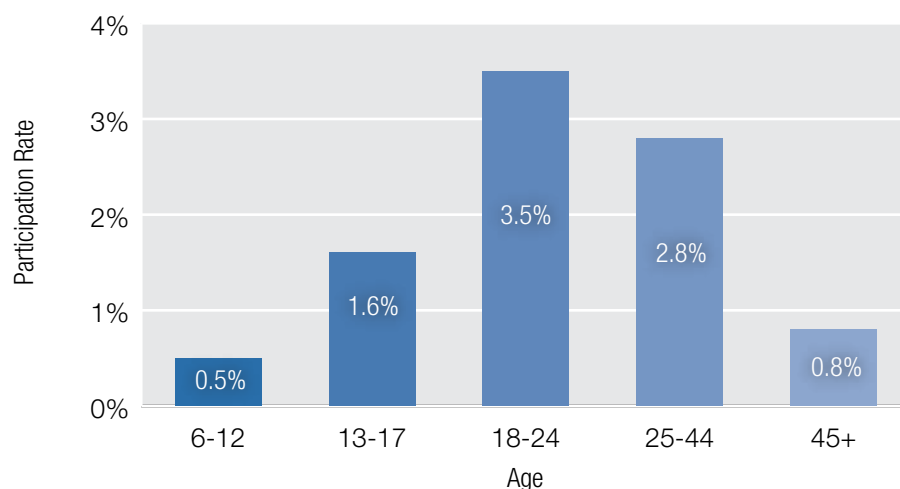
Participation in Trail Running by Year

All Participants, Ages 6+



Participation in Trail Running by Age

All Americans, Ages 6+, 2009



Participation in trail running varies by age. A one-year snapshot of trail running participation reveals the popularity of the activity among specific age groups and suggests the life cycle of participation.

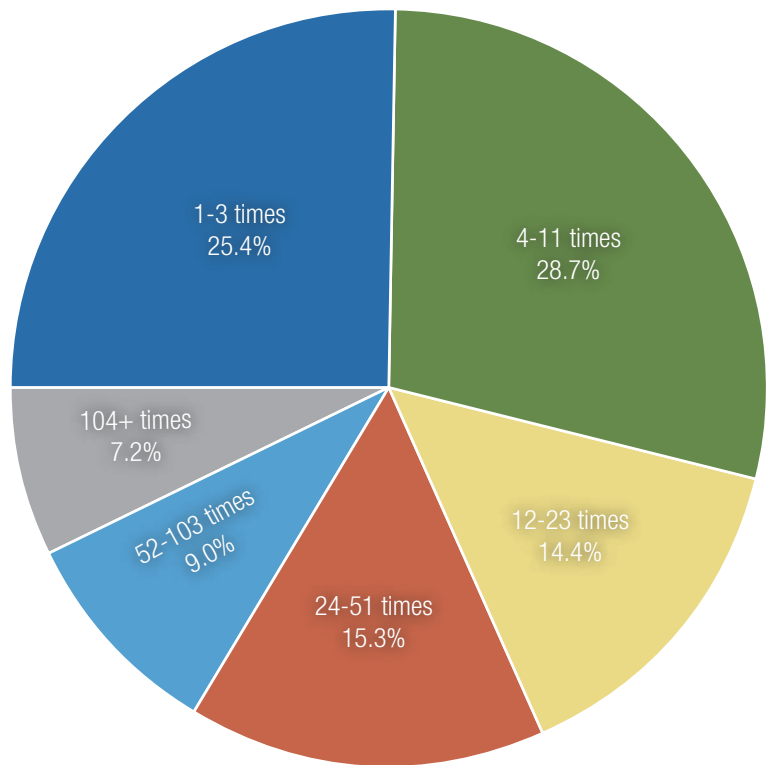
Unlike many outdoor activities, which decrease in participation through adolescence, trail running increases in participation among youth as they age to a high of 3.5 percent among ages 18 to 24. After young adulthood, participation declines to .8 percent among adults ages 45 and older.

Annual Outings

In 2009, trail running participants made 153.7 million annual outings. For some participants, this meant getting out once a season and for others, once a month or week.

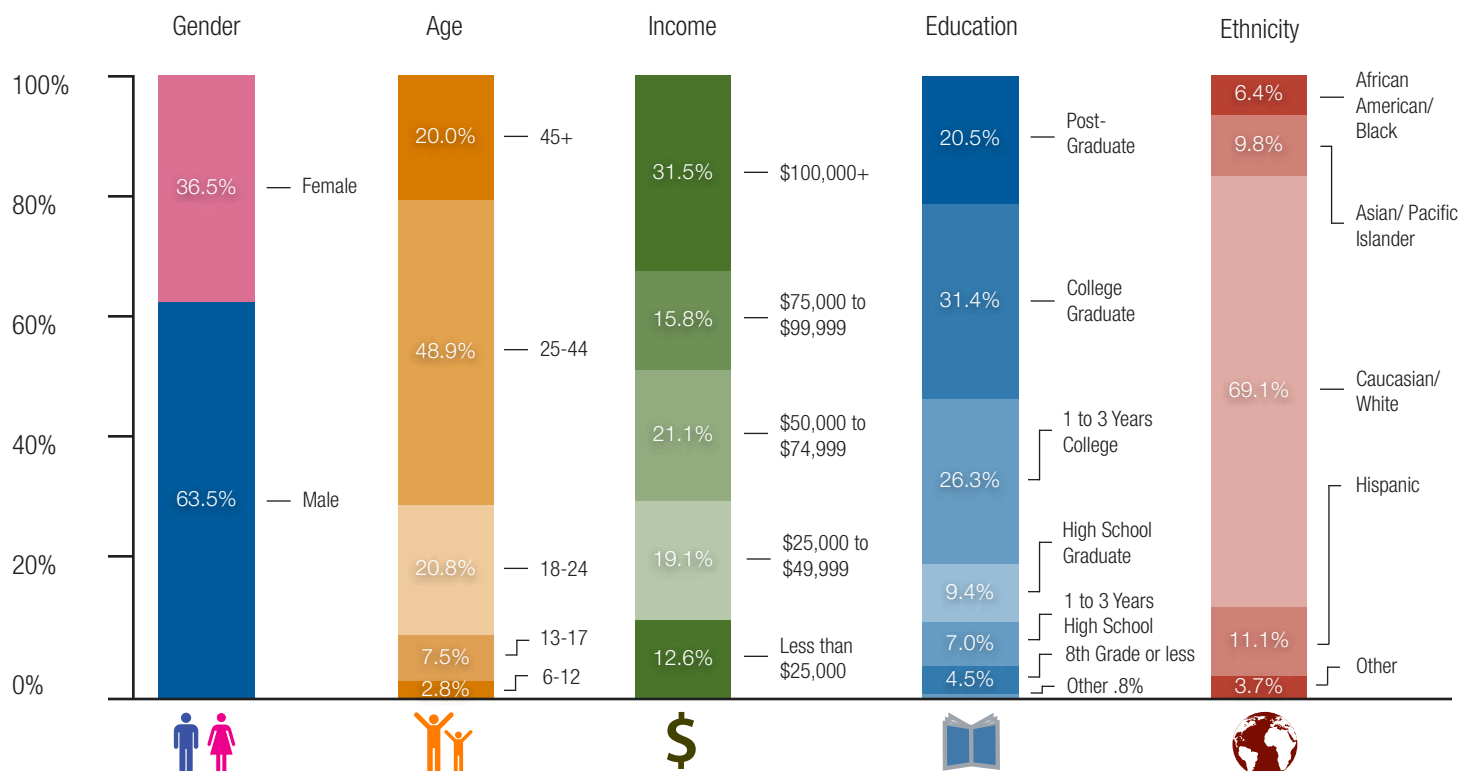
31.8 days

The average trail runner got out 31.8 days in 2009.



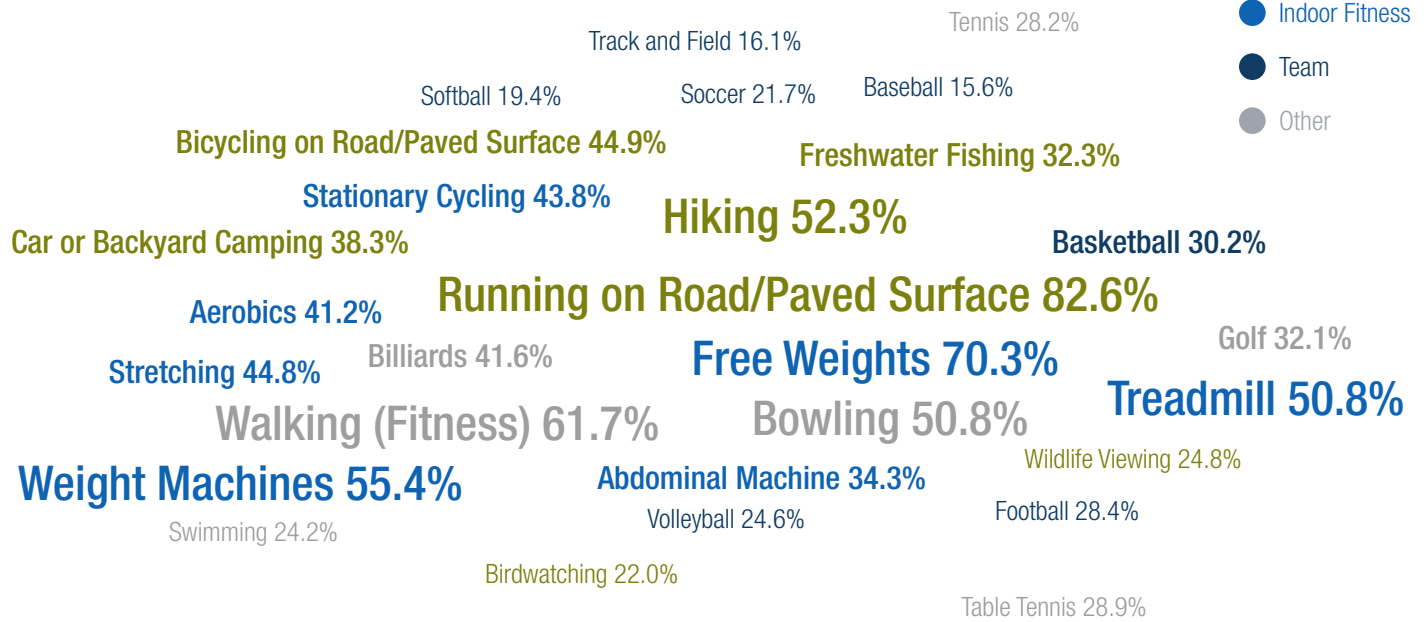
Demographics

Division of trail running participants by demographic



Crossover Participation

What team, outdoor, indoor fitness and other activities do trail runners participate in?



Running/Jogging	82.6%	Camping (Car or Backyard)	38.3%	* Climbing (Sport, Indoor, Bouldering, Traditional, Ice or Alpine/ Mountaineering)	24.9%
* Free Weights (Barbells, Dumbells and Hand Weights)	70.3%	Abdominal Machine/Device	34.3%	Wildlife Viewing	24.8%
Walking (Fitness)	61.7%	* Wildlife Viewing or Bird Watching	33.7%	* Volleyball (Court, Grass and Beach)	24.6%
Free Weights (Hand Weights)	55.5%	Elliptical Motion Trainer	32.6%	Swimming (Fitness/Competition)	24.2%
Weight/Resistance Machines	55.4%	Fishing (Freshwater/Other)	32.3%	Darts	23.6%
Free Weights (Dumbells)	54.7%	* Golf (9/18 Hole or Driving Range)	32.1%	* Shooting and Target Shooting (Sport Clays, Trap/Skeet, Rifle, and Shotgun)	23.4%
Hiking (Day)	52.3%	Stationary Cycling (Upright)	31.7%	Other Exercise to Music	23.1%
* Bicycling (Road/Paved Surface, Mountain/Non-Paved Surface or BMX)	50.8%	* Paddling (White Water Kayaking, Sea/ Tour Kayaking, Recreational Kayaking, Canoeing or Rafting)	31.2%	Golf (Driving Range)	23.0%
Treadmill	50.8%	Home Gym Exercise	30.7%	Birdwatching	22.0%
Bowling	50.8%	Basketball	30.2%	* Soccer (Indoor and Outdoor)	21.7%
Bicycling (Road/Paved Surface)	44.9%	Table Tennis	28.9%	Climbing (Sport/Indoor/Boulder)	21.4%
Stretching	44.8%	Yoga	28.6%	Backpacking	20.5%
Free Weights (Barbells)	44.7%	* Football (Touch, Tackle and Flag)	28.4%	Bicycling (Mountain/Non-Paved Surface)	20.0%
* Stationary Cycling (Upright Bikes, Recumbent Bikes or Spinning)	43.8%	Aerobics (Low-Impact)	28.3%	Rowing Machine	19.9%
* Camping (Car, Backyard or RV)	43.5%	Tennis	28.2%	Stationary Cycling (Spinning)	19.8%
Billiards/Pool	41.6%	Stair-Climbing Machine	27.4%	* Softball (Regular and Fast Pitch)	19.4%
* Aerobics (High Impact, Low Impact and Step)	41.2%	Aerobics (High-Impact)	27.2%	* Kayaking (White Water, Sea/Touring or Recreational)	19.0%
* Fishing (Fly, Freshwater and Saltwater)	38.3%	Golf (9/18 Hole Course)	25.5%	Football (Touch)	18.9%

* Denotes participation in at least one of the multiple activities listed.

Geography of Trail Running Participation

US Census Regions

1. Pacific

Participation rate: 2.1%

Percent of all US participants: 18.8%

2. Mountain

Participation rate: 2.1%

Percent of all US participants: 8.7%

3. West South Central

Participation rate: 1.5%

Percent of all US participants: 10.0%

4. West North Central

Participation rate: 1.8%

Percent of all US participants: 7.1%

5. East North Central

Participation rate: 1.5%

Percent of all US participants: 13.3%

6. East South Central

Participation rate: 0.9%

Percent of all US participants: 3.0%

7. South Atlantic

Participation rate: 2.1%

Percent of all US participants: 24.3%

8. Middle Atlantic

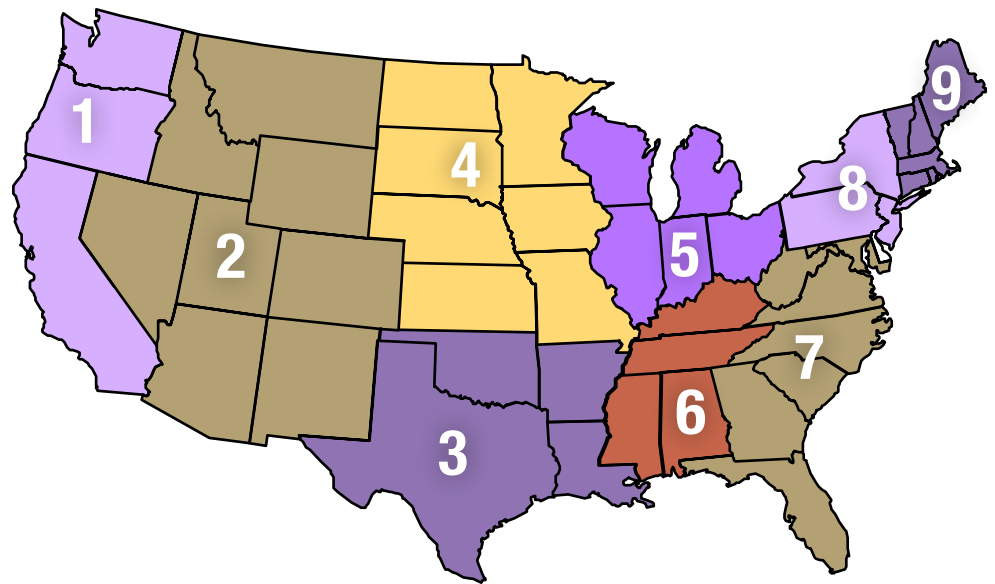
Participation rate: 1.2%

Percent of all US participants: 9.6%

9. New England

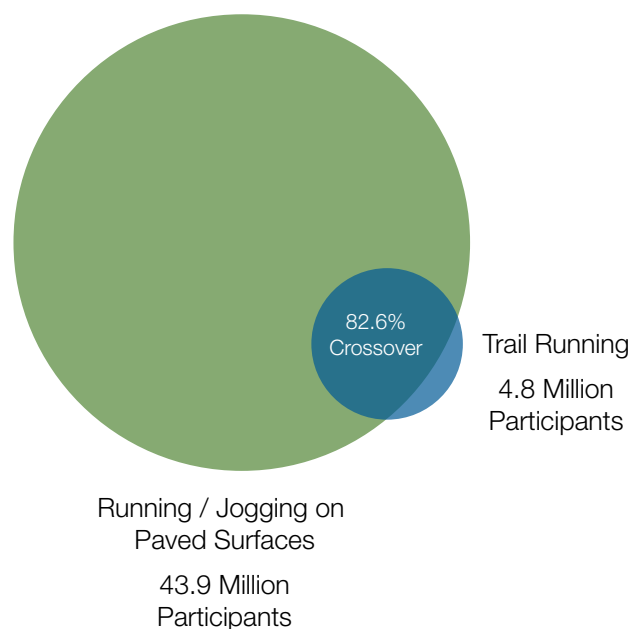
Participation rate: 1.8%

Percent of all US participants: 5.1%



Trail Running and Road Running Crossover Participation

All Americans, Ages 6+, 2009



Accessible Walking Paths

All Americans, Ages 6+

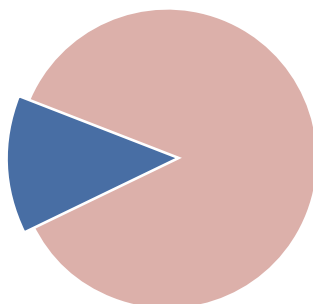
Americans with comprehensive networks of safe and clearly designated walking paths in their neighborhoods are over **120%** more likely to participate in trail running than Americans without paths.

* Based on 2008 data

First Time Participants

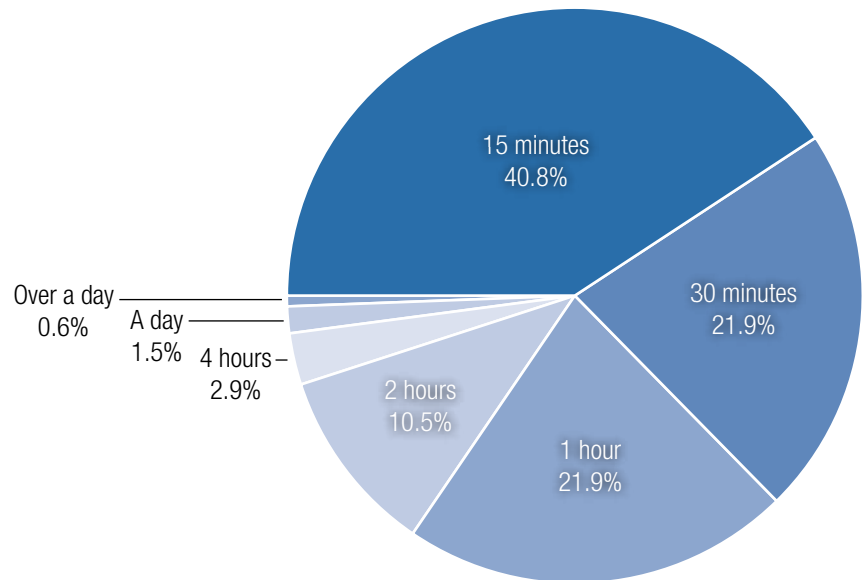
All Americans, Ages 6+, 2009

13.1% of trail runners tried the sport for the first time in 2009



Time Traveled from Home

Time Participants Traveled from Home on Their Last In-Season Trail Running Trip, Ages 6+, 2009



Competition

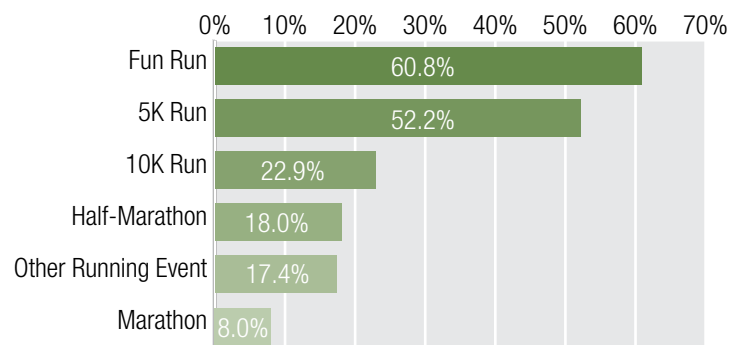
All Americans, Ages 6+

2.2% of trail runners compete
in trail running for an
average of **15.4** days
per participant

* Based on 2008 data

Most Popular Trail and Road Races Among Competitive Trail Runners

Ages 6+, 2009



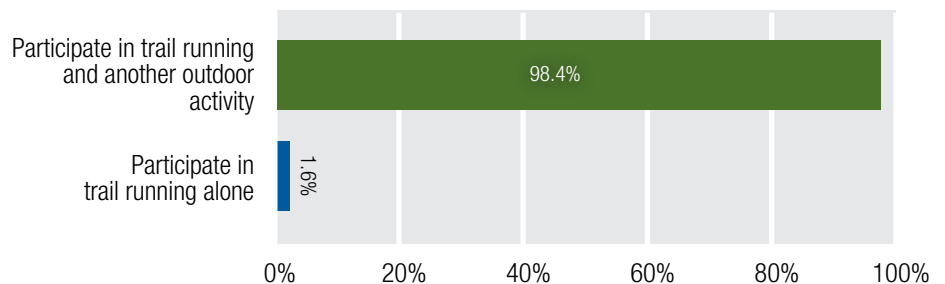


Trail Running: A Gateway to the Outdoors

Participation in outdoor recreation often begins with specific “gateway” outdoor pursuits. These activities — fishing, bicycling, running on paved surfaces, trail running, camping and hiking — are popular, accessible and often lead to

participation in other outdoor activities. Trail runners are extremely likely to participate in multiple outdoor activities. Only a small percentage of trail runners — 1.6 percent — participate in trail running and no other outdoor activity.

Trail Running Participants: Outdoor Enthusiasts



Who Introduces Trail Runners to Outdoor Activities?

“Who influenced your decision to participate in outdoor activities?”		Ages 6+
Friends		46.8%
Parents		32.8%
Myself (no one else influenced me)		32.2%
Brothers, sisters or other relatives		23.5%
Community program (Boy Scouts, YMCA, neighborhood program)		11.5%
School program		11.0%
TV, movies, magazines, books or web sites about the outdoors		9.8%
Experienced mentor		9.2%
Outdoor education program such as Outward Bound		4.2%
Media icon, sports figure or accomplished athlete		4.1%

* Based on 2008 data



What Do Trail Runners Enjoy About Outdoor Activities?

"What motivated your decision to participate in outdoor activities?"	Ages 6+
It's relaxing.	64.5%
It's a great way to get exercise.	60.6%
It's fun.	57.8%
I want to be healthy.	55.8%
I enjoy discovery and exploration.	48.5%
I get away from my usual routine.	45.4%
I like challenges.	39.5%
I like new experiences.	39.1%
I get a feeling of accomplishment.	34.0%
I can participate in outdoor activities near my house.	33.6%
I get to spend time with my friends.	27.0%

* Based on 2008 data



What Keeps Trail Runners From Getting Outdoors More Often?

"What keeps you from participating in outdoor activities more often?"	Ages 6 +
I don't have the time.	58.0%
I'm not interested.	18.4%
I don't want to spend the money on gear or equipment.	18.2%
I'm involved in other activities such as team sports and fitness activities.	18.2%
I have too much work/schoolwork.	14.9%
I don't know people to go with.	12.9%
I don't know how to get started, what to do or where to go.	8.9%
I would rather spend free time watching TV/movies, surfing the net or playing video games.	8.5%
There aren't places to participate in outdoor activities near where I live.	7.6%
I don't like bugs or dirt.	6.2%
I'd rather spend time with friends.	6.0%
I'm not in physical shape.	3.9%
My parents don't participate in outdoor activities.	3.3%
I don't enjoy exercise.	2.1%
I'm worried I might get hurt.	1.9%
I think it's spooky in the outdoors.	1.5%

* Based on 2008 data



Methodology

During January and February 2010, a total of 40,141 online interviews were carried out with a nationwide sample of individuals and households from the US Online Panel operated by Synovate. A total of 15,067 individual and 25,074 household surveys were completed. The total panel has over one million members and is maintained to be representative of the US population. Oversampling of ethnic groups took place to boost response from typically underresponding groups.

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, household size, region and population density. The total population figure used was 281,658,000 people aged six and above. The report details participation among all Americans: youth, young adults and adults.

The 2009 participation survey sample size of 40,141 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 U.S. A sport with a participation rate of five percent of the total population has a confidence interval of plus or minus 0.21 percentage points at the 95 percent confidence level. This translates to plus or minus four percent of participants. Small groups' participation, especially those with less than one million participants, can be expected to fluctuate from year to year.

The survey methodology changed slightly in 2007 to include household interviews in addition to individual interviews. The two methodologies are comparable, and

all results are indicative of the state of sports and leisure participation. Caution is recommended, however, in placing undue emphasis on trends extending back to 2006.

Youth Interviews

All interviews of 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 6 to 12, and they 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.

Notes

Unless otherwise noted, the data in this report was collected during the latest 2010 participation survey, which focused on American participation in the 2009 calendar year. 2006, 2007 and 2008 data noted in the report was collected in previous surveys.

For greater accuracy, snow sports participation is measured annually for each winter season. 2009 participation represents participation in the 2008/2009 winter season, 2008 participation represents participation in the 2007/2008 winter season, and 2007 participation represents participation in the 2006/2007 winter season. Hunting represents a combination of four individually measured activities, including hunting (rifle), hunting (shotgun), hunting (handgun) and hunting (bow).



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