

OUTDOOR RECREATION PARTICIPATION STUDY
BIRD WATCHING

"Have you gone on a bird watching excursion that involved traveling more than one-quarter of a mile from your home?"

BIRD WATCHING: 15.6 MILLION PARTICIPANTS, 188 MILLION OUTINGS

THE 2005 AMERICAN BIRD WATCHER

- › Balanced by gender and marital status
- › Just over a third have children under the age of 18 living in their household
- › Over two-thirds are over the age of 35 with half over the age of 45 (mean age 45)
- › Equally distributed across regions
- › Hiking is the most popular outdoor activity
- › Went on bird watching excursions 12 times on average during 2005
- › Close to a one-third limited their activity to only a single outing during the year

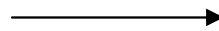
MAJOR TRENDS IN BIRD WATCHING

The combination of fewer Americans participating in bird watching and a sharp decline in the number of average outings in 2005 has led to a total number of outings in 2005 that registered well below the total number of outings generated in 2001 and 2002.

Demographically, the bird watching population has remained very stable.

Year 2005 Events of Note

One of the few outdoor activities measured where there is a predominately older participant profile.

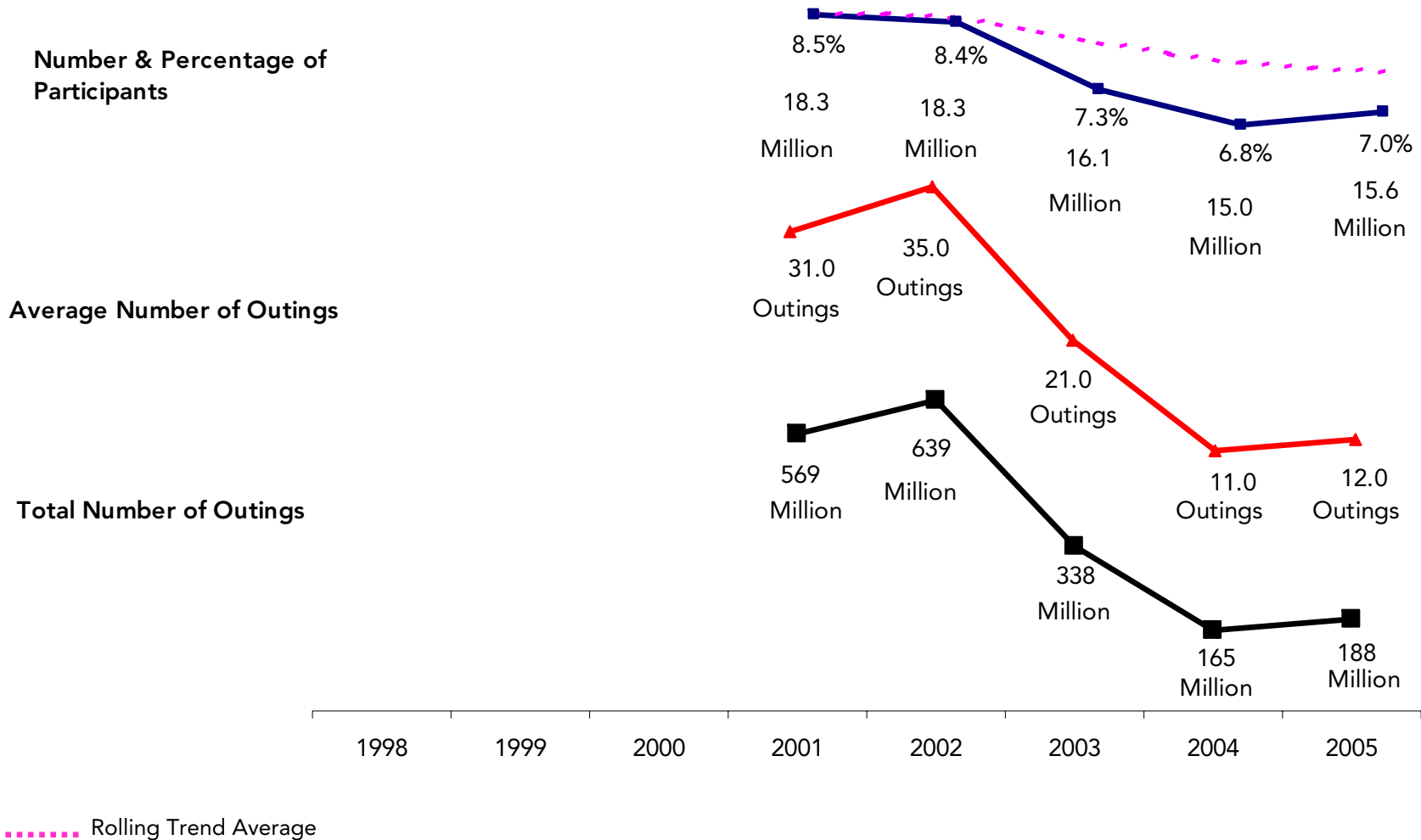


Observation/Implication

Bring more older Americans into the out-of-doors through bird watching activities.

BIRD WATCHING: PARTICIPATION AND FREQUENCY'S IMPACT ON TOTAL OUTINGS

Participation in bird watching during 2005 has declined from 2001 and 2002 when it was first measured. Not only has participation declined but the average number of outings have dropped from 23 to 12. The combination of fewer Americans participating in the activity and a sharp decline in the number of average outings has led to a total number of outings in 2005 that registered well below the total number of outings generated in 2001 and 2002.



BIRD WATCHING: FREQUENCY OF PARTICIPATION

Close to a third of bird watchers only participate in the activity once a year. Fifteen percent of bird watchers go out on excursions 11 or more times a year—a significant decline from 2003 when almost a quarter of bird watchers participated 11 or more times a year.

Frequency and Outings Among Americans 16 and Older

Frequency	1998	1999	2000	2001	2002	2003	2004	2005
1 time	N/A	N/A	N/A	27%	26%	24%	29%	30%
2 times	N/A	N/A	N/A	20%	18%	20%	17%	19%
3 to 6 times	N/A	N/A	N/A	24%	24%	27%	31%	26%
7 to 10 times	N/A	N/A	N/A	6%	6%	5%	8%	9%
11 or more times (NET)	N/A	N/A	N/A	22%	26%	24%	15%	15%
11 to 30	N/A	N/A	N/A	10%	11%	15%	11%	10%
31 or more times	N/A	N/A	N/A	12%	15%	9%	4%	5%
Average Frequency	0.0	0.0	0.0	31.0	35.0	21.0	11.0	12.0
Total Outings (Millions)	0	0	0	569	639	338	165	188

= Significant difference from 2003

BIRD WATCHING: PARTICIPANT DEMOGRAPHIC PROFILE TRENDS

During 2005, the bird watching population was well balanced among males and females, married and unmarried and across all regions. The activity is predominantly Caucasians and over two-thirds of bird watchers are over the age of 35, with almost half over the age of 45.

Just over a third of bird watchers have children under the age of 18 living in their household.

Demographic Profile

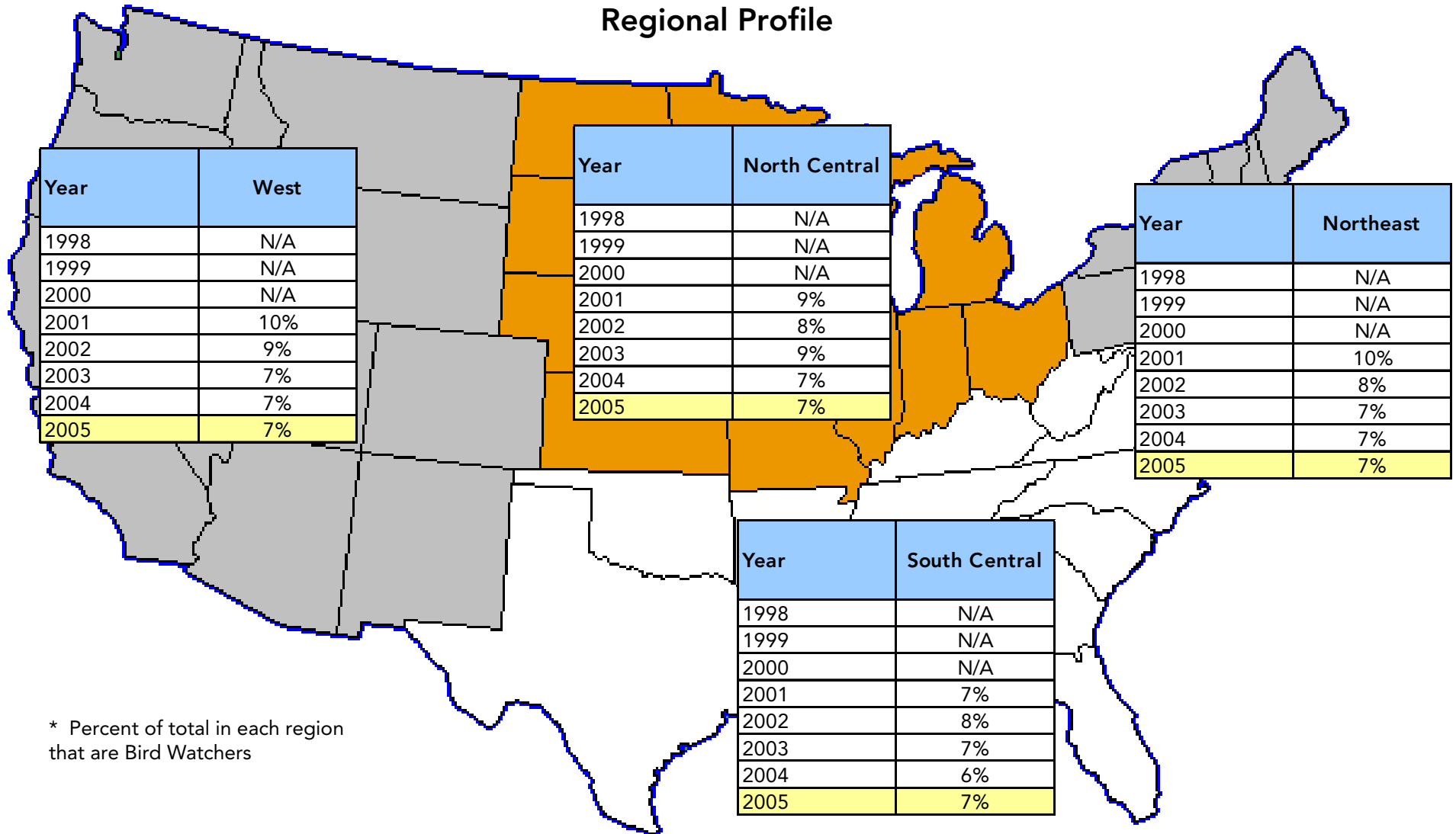
Participants	1998	1999	2000	2001	2002	2003	2004	2005
Gender								
Male	N/A	N/A	N/A	50%	47%	56%	48%	51%
Female	N/A	N/A	N/A	50%	53%	44%	52%	49%
Age								
16 to 24	N/A	N/A	N/A	15%	14%	15%	11%	14%
25 to 34	N/A	N/A	N/A	16%	16%	16%	16%	18%
35 to 44	N/A	N/A	N/A	23%	16%	17%	22%	20%
45+	N/A	N/A	N/A	45%	54%	52%	51%	49%
Marital Status								
Married	N/A	N/A	N/A	52%	54%	56%	61%	56%
Unmarried	N/A	N/A	N/A	48%	46%	44%	39%	44%
Ethnicity								
Caucasian	NA	NA	NA	NA	NA	81%	80%	83%
African-American	NA	NA	NA	NA	NA	3%	6%	5%
Hispanic	NA	NA	NA	NA	NA	10%	10%	9%
Asian	NA	NA	NA	NA	NA	3%	2%	2%
Other	NA	NA	NA	NA	NA	6%	9%	6%
Children <18								
Yes	N/A	N/A	N/A	34%	29%	37%	45%	38%
Household Income								
<\$40k	NA	N/A	N/A	42%	43%	34%	37%	39%
\$40k - \$79k	NA	N/A	N/A	40%	37%	44%	43%	41%
\$80k+	NA	N/A	N/A	18%	21%	23%	21%	20%
Region								
Northeast	N/A	N/A	N/A	23%	18%	17%	21%	20%
South Central	N/A	N/A	N/A	27%	34%	32%	31%	33%
North Central	N/A	N/A	N/A	23%	25%	27%	24%	23%
West	N/A	N/A	N/A	28%	23%	23%	25%	25%

*Ethnicity: Will not add to 100%, see page 239 for details.

BIRD WATCHING: WHERE PARTICIPANTS LIVE*

Seven percent of the population in each region participates in bird watching.

Regional Profile



* Percent of total in each region that are Bird Watchers

BIRD WATCHING: PARTICIPANT CROSSOVER ACTIVITY TRENDS

Bird watchers participate in a variety of other outdoor activities with hiking being the most popular among this group in 2005.

Crossover Activities

Activities	Bird Watching in 2003	Bird Watching In 2004	Bird Watching in 2005	Size of 2005 Crossover Participation Populations (Millions)
Backpacking	13%	13%	15%	2,357,072
Bicycling (Any Type)	43%	45%	43%	6,793,444
Bicycling (Paved Road)	37%	42%	39%	6,092,913
Bicycling (Mountain)	30%	28%	33%	5,155,703
Bicycling (Single Track)	22%	22%	27%	4,215,951
Bicycling (Dirt Road)	23%	25%	25%	3,893,398
Bird Watching	100%	100%	100%	15,626,754
Camping (Any Type)	45%	37%	40%	6,242,053
Camping (Away from Car)	13%	11%	12%	1,884,877
Camping (Car)	32%	27%	30%	4,750,715
Canoeing	18%	19%	20%	3,168,382
Climbing (Any Type)	7%	6%	8%	1,186,197
Climbing (Artificial Wall)	4%	5%	6%	879,698
Climbing (Natural Rock)	3%	5%	3%	423,358
Climbing (Ice)	2%	2%	1%	178,265
Cross-Country/Nordic Skiing	8%	9%	8%	1,198,441
Fishing (Any Type)	N/A	47%	42%	6,514,569
Fishing (Fly)	13%	14%	12%	1,950,877
Fishing (Non-Fly)	N/A	45%	39%	6,066,200
Hiking	60%	63%	61%	9,494,905
Kayaking (Any Type)	8%	9%	10%	1,495,940
Kayaking (Non-Whitewater)	8%	8%	9%	1,440,487
Kayaking (Sit-On-Top)	4%	6%	8%	1,183,649
Kayaking (Tour/Sea)	4%	4%	4%	652,055
Kayaking (Whitewater)	1%	3%	2%	274,379
Paddle sports (Any Type)	23%	26%	29%	4,462,897
Rafting	7%	7%	8%	1,305,797
Snowshoeing	5%	7%	7%	1,025,600
Telemark Skiing	3%	4%	2%	242,792
Trail Running	24%	24%	27%	4,229,876