

The background of the image is a wide-angle photograph of a mountainous terrain. In the foreground, a trail runner wearing a red shirt, black shorts, and a black vest is captured in mid-stride, running on a grassy, rocky trail. The middle ground shows a series of green hills and mountains under a clear blue sky with a few wispy clouds. The overall scene conveys a sense of adventure and natural beauty.

# State of Trail Running Report

2024

# About the Authors



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- Founder of Good Men Project
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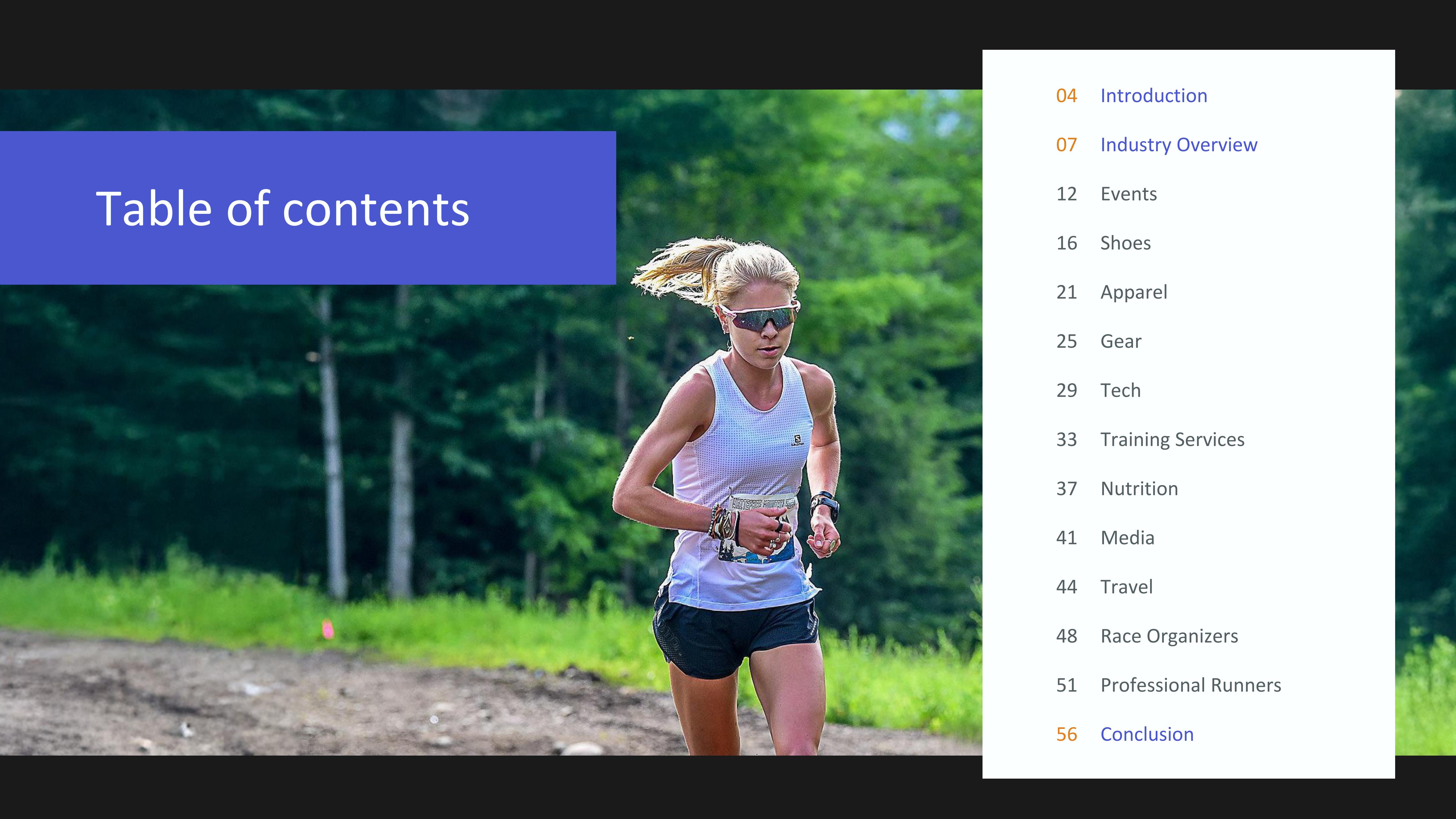


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- 2+ years as Consultant at Bain & Company
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# Introduction

# Sharing insights into the community we love

This project was born out of our passion for trail running and a genuine desire to give back to a community that's given us so much. Recognizing a gap in comprehensive data on trail runners' habits, motivations, and economic impact, we undertook an extensive study to shed light on this vibrant, growing ecosystem.

## First of all, we would like to thank our collaborators

Along the way, we were fortunate to consult a range of experts—athletes, event organizers, and industry leaders—who generously shared their insights and experiences. Their contributions added depth and authenticity to our findings, allowing us to craft a report that truly reflects the spirit of trail running. To everyone who helped bring this report to life, we extend our deepest gratitude.

We hope these findings will inspire positive change and strengthen the bonds within this vibrant community. Here's to every step, every trail, and a future filled with limitless possibilities for the sport we all love.

See you on the trails,  
Tom and Mikey



# Research Methodology

To better understand the 14.8 million Americans in the trail running community, we conducted a **comprehensive survey**, exploring participant demographics, spending habits, preferences, and emerging trends. **Interviews with professional athletes and race organizers** provided deeper insights into the study.

The fieldwork for both quantitative and qualitative research were conducted between **August 1, 2024 - August 19, 2024**.

Source: There are 14.8 million trail runners in the US according to the SFIA's 2024 Topline Participation Report

## Quantitative Research

The quantitative component included a survey of **2,010 respondents** from diverse demographics representative of trail runners, spanning different age groups, gender identities, income levels, and regions across the United States.

The data was gathered through an online survey using multiple questions format, aimed to uncover meaningful trends and preferences within the running community.

Our sample focused on dedicated trail runners. To ensure a more balanced perspective, we adjusted the data by excluding elite runners and those who spend over \$1,000 on events (i.e., outliers), allowing us to normalize the results and more accurately reflect the average trail runner.

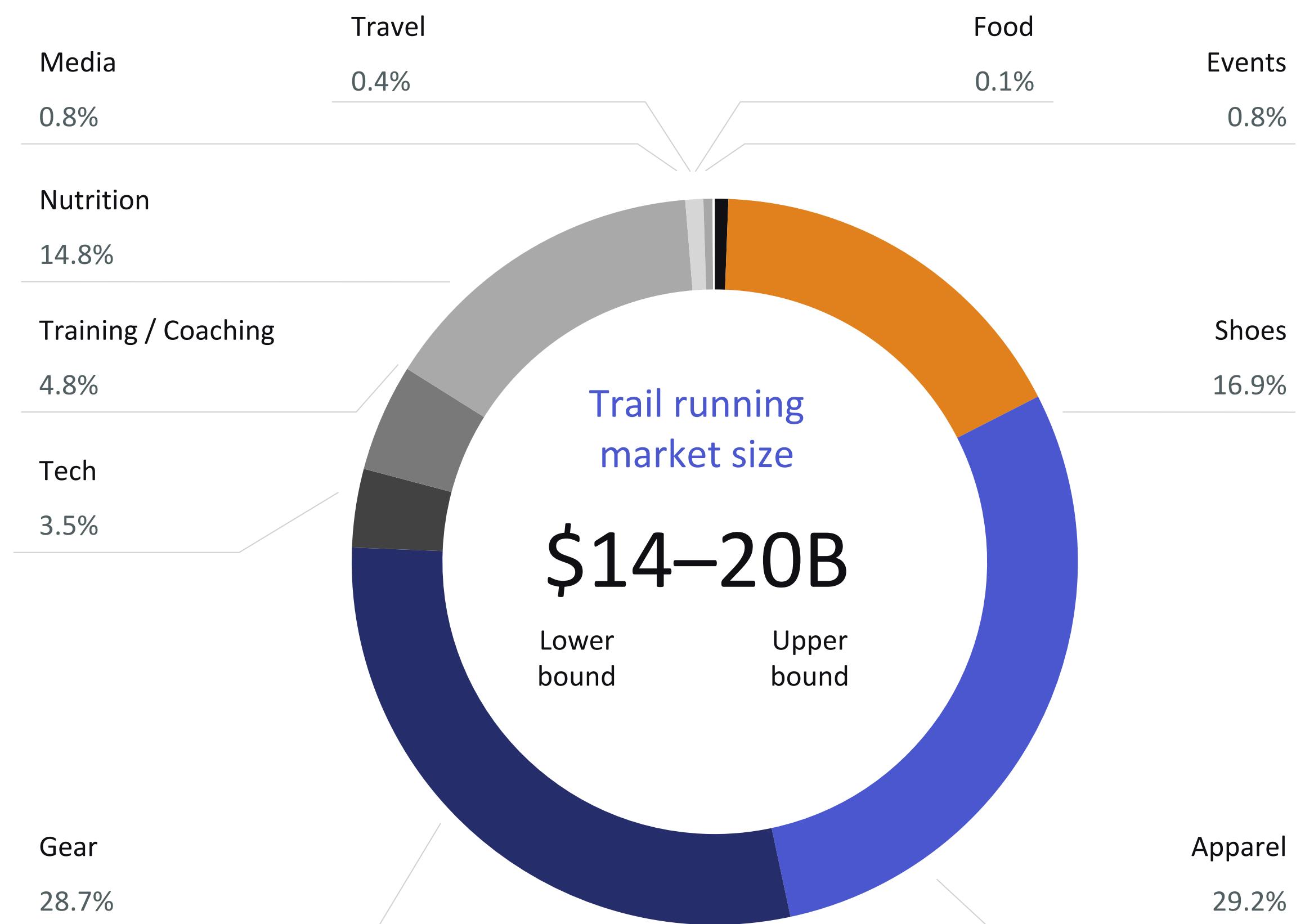
## Qualitative Research

The qualitative component of this study included in-depth interviews with **seven (7) professional trail runners and two (2) seasoned race organizers**, offering a closer look into the personal experiences, challenges, and motivations driving the trail running community.

Together, these conversations enriched the study, bringing an authentic, human element that complements the quantitative findings and offers context to the numbers.

# Industry Overview

# Trail running triggers \$14-20B spend across different markets



Note: The trail running market size is based on a total 14.8 million trail runners in the US according to the SFIA's 2024 Topline Participation Report.

Sources: <sup>1</sup>Grandview Research; <sup>2</sup>Mordor Intelligence; and <sup>3</sup>Globe News Wire

Trail running is outpacing:

\$20B

Wearables market in the US<sup>1</sup>

\$15B

Charter flight market<sup>2</sup>

\$9B

Blockchain technology market<sup>3</sup>

# Who are trail runners?

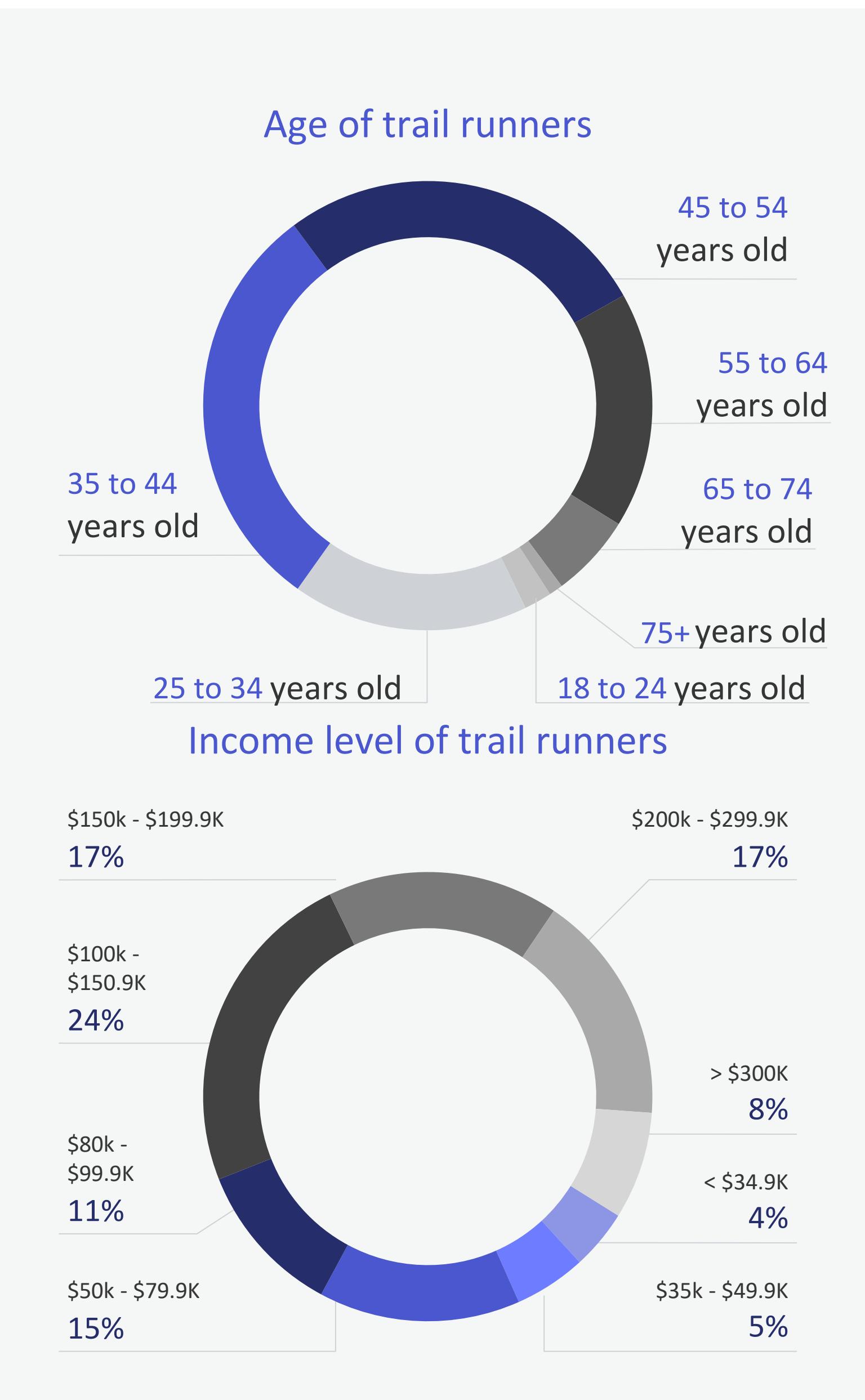
The **14.8M** trail runners in the US come from a wide range of backgrounds, but they share a passion for the sport and a commitment to staying active.<sup>1</sup>

## They reflect an even gender split

The community is evenly split between men (50%) and women (49%), with a small percentage (1%) of non-binary participants. Most runners are aged 35 to 54, with 30% between 35-44 and 27% between 45-54.

## They are affluent and well-educated

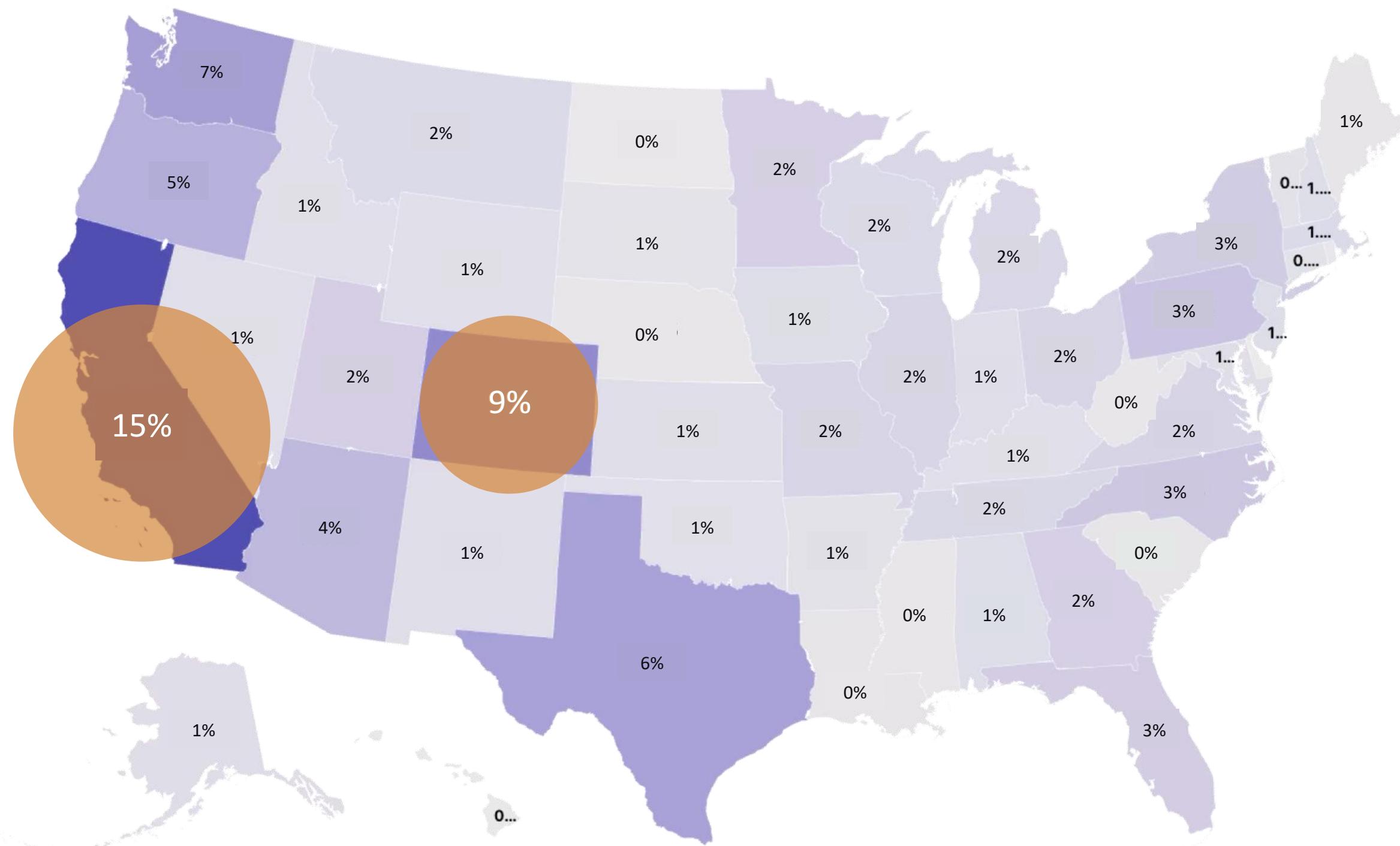
The trail running community is relatively affluent, with 22% of runners earning between \$100,000 and \$149,999 annually. Another 15% earn between \$150,000 and \$199,999, and 7% have incomes above \$300,000, reflecting a group that is financially well-off. Trail runners are also highly educated, with 38% holding a bachelor's degree and 30% having a master's degree. This suggests that trail running attracts individuals who are professionally successful.



# Who are trail runners?

## They live close to nature

The western United States is home to many trail runners, especially California (15%) and Colorado (9%). Most live in suburban (46%) or rural (30%) areas, where natural landscapes are perfect for the sport.



## A lifelong sport

Close to 60% of trail runners have been running for more than 6 years. Trail running is a sport that people can do throughout their entire lives.

# They love the outdoors

Beyond trail running, participants are often involved in other outdoor and fitness activities. Hiking leads the way, with 78% of runners hitting the trails outside of their running routines. Other common activities include weightlifting (49%), mountain or road biking (37%), and yoga (34%), demonstrating a well-rounded approach to physical fitness.



# Where do trail runners spend money?



Events



Gear



Nutrition



Shoes



Tech



Media



Apparel



Training / Coaching Services



Travel

# Trail Running Events

# Trail running events are gaining steam

Trail running events have seen a resurgence following the pandemic. Larger, established events like the Dipsea Race and Xterra Trail Run attract thousands of annual participants. Smaller races also continue to experience growth, reflecting the community-focused nature of trail running.

257K

Trail runners participate in trail running events

\$465–613

Average annual spend on trail running events



# How do trail runners participate in events?

For most, trail running isn't just a hobby—it's a way of life. Events are central to this passion, offering runners the chance to challenge themselves and connect with others. From local to destination races, trail runners are deeply committed, investing both time and money.

## Race participation over the last 12 months

Nearly 43% of trail runners signed up for five or more races last year, showcasing their passion for competition and adventure. Another 18% joined three events, and 16% participated in four, reflecting their steady involvement in both local and destination races.

## Future race plans

Looking ahead, 44% of trail runners plan to enter five or more races next year, pointing to growing enthusiasm for upcoming events.

## Spending on race registrations

Trail runners are also willing to invest in their passion. **Over 40% spent between \$100 and \$499 on race entries last year**, while 34% spent \$500 to \$999. Notably, 13.5% invested more than \$1,000, with a few spending over \$2,000 multiple, premium race experiences.



## Trail runners favorite event swag:

48.89%

Technical shirts

3.49%

Bags

16.35%

Hats

8.60%

Socks

4.30%

Buff/Headbands

2.07%

Water bottles



# Trail Running Shoes



# Trail running shoes: A \$2.4-4.5B market

The sport's popularity has been in part fueled by innovations in trail running footwear, with brands introducing more advanced, durable, and terrain-specific shoes to meet runners' needs.

**11.9M**

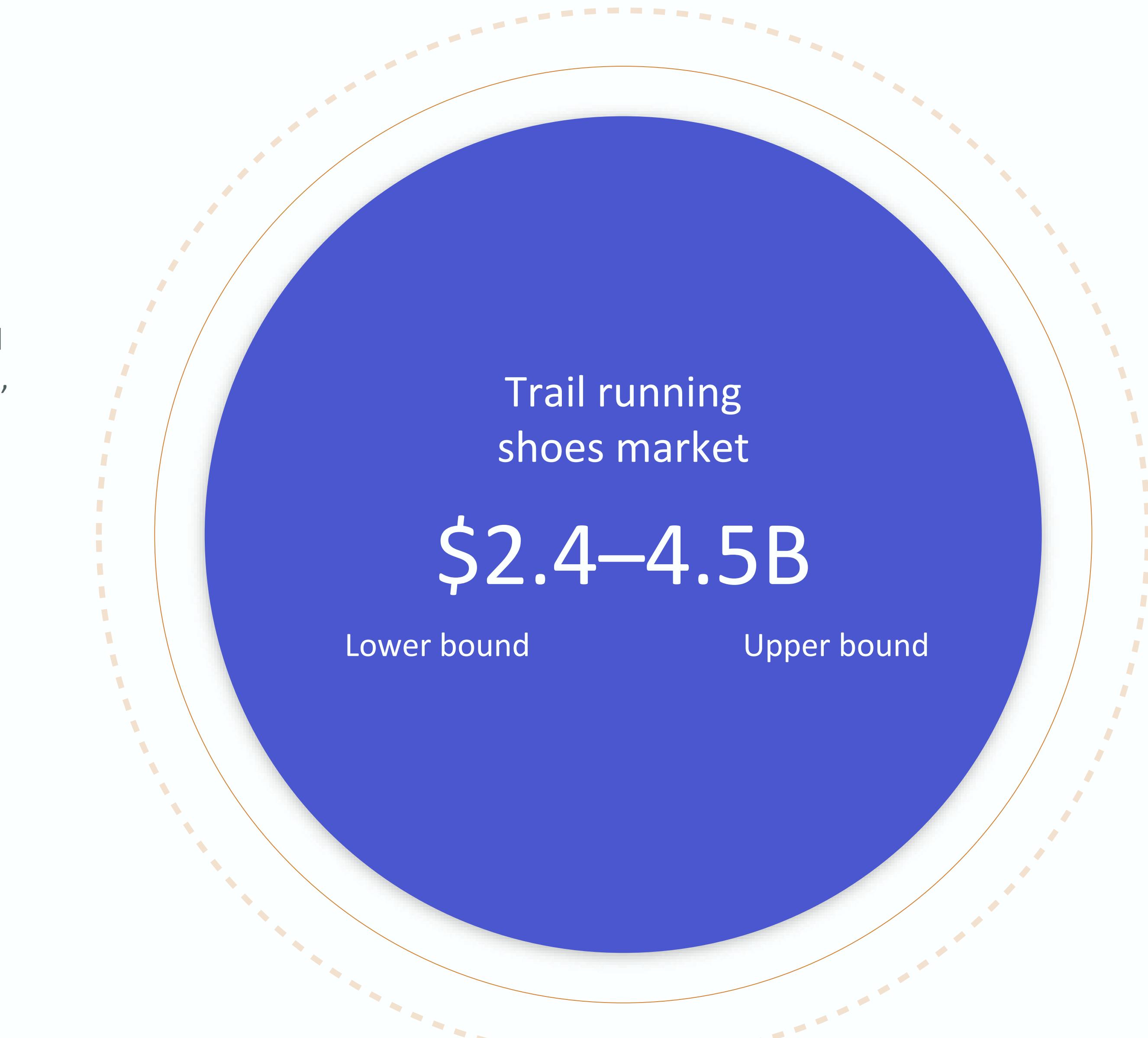
Number of average trail runners in the US

**1–3**

Number of pairs of shoes purchased per year

**~\$140**

Average spend per trail running shoe



Note: The market size is determined by excluding elite trail runners, with the ranges excluding additional outliers.

# What are trail runners' shoe preferences?

Trail runners rely heavily on their shoes for traction and durability, making footwear one of their most important investments. With rugged terrain and long distances in mind, their choices reflect a blend of performance and comfort.

## Hoka is their preferred brand

Hoka leads the way, with 43% of trail runners owning a pair, followed by Altra at 34% and Saucony at 21%. Other favorites include Salomon, Nike, Brooks, and Topo Athletic, while nearly 20% of participants own a variety of other brands.

## Runners buy multiple pairs per year

Trail runners frequently update their footwear, with **26% buying two pairs in the last year and 21% purchasing three**. Another 15% bought four pairs, while 8% invested in six or more, showing how often they replace shoes to keep up with the demands of the sport.

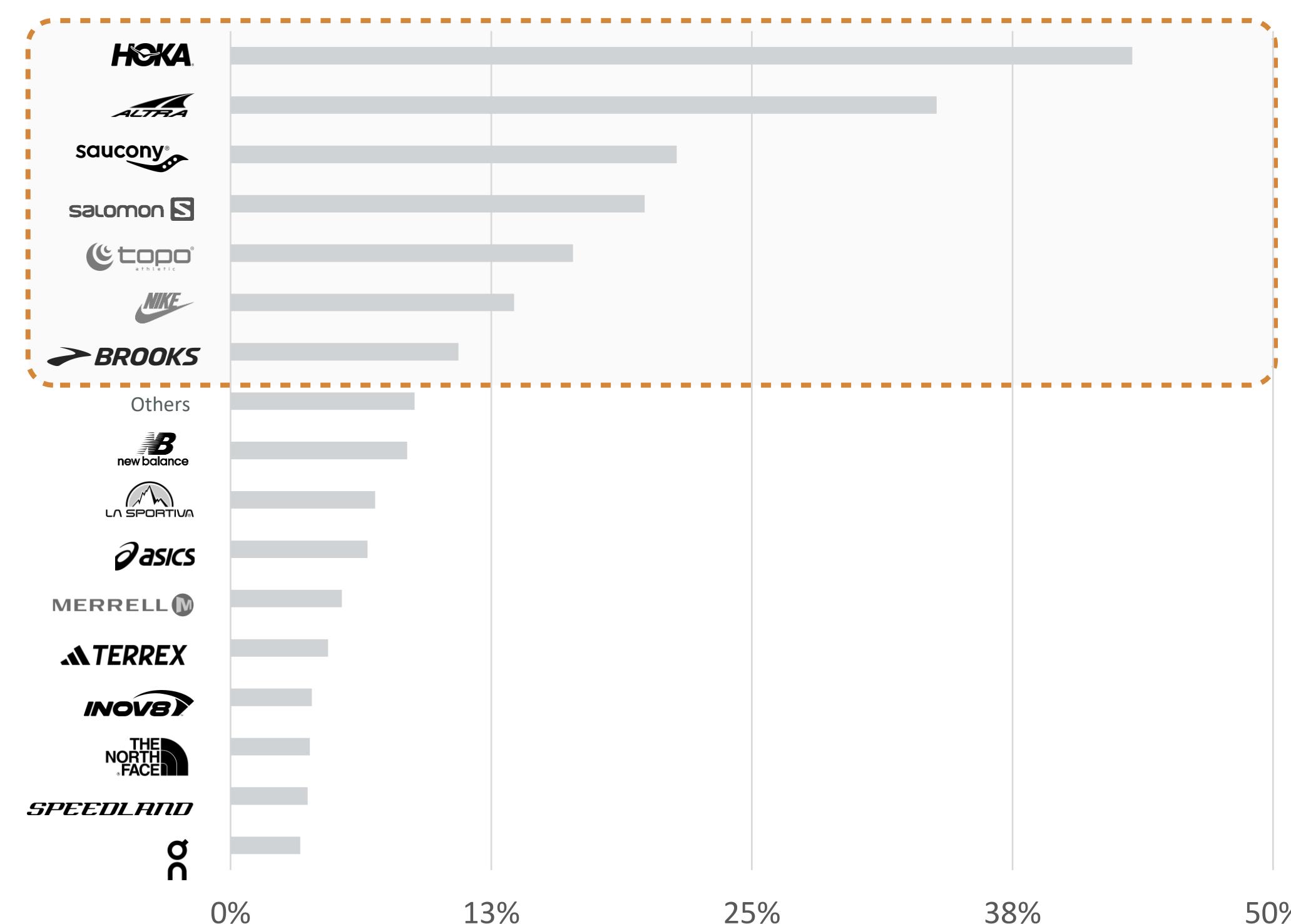
## And they're willing to invest in the best

Quality is a priority, with over 54% of runners spending between \$100 and \$149 per pair, and 33% willing to pay between \$150 and \$199. A dedicated group—around 6%—invests more than \$200 for premium footwear.



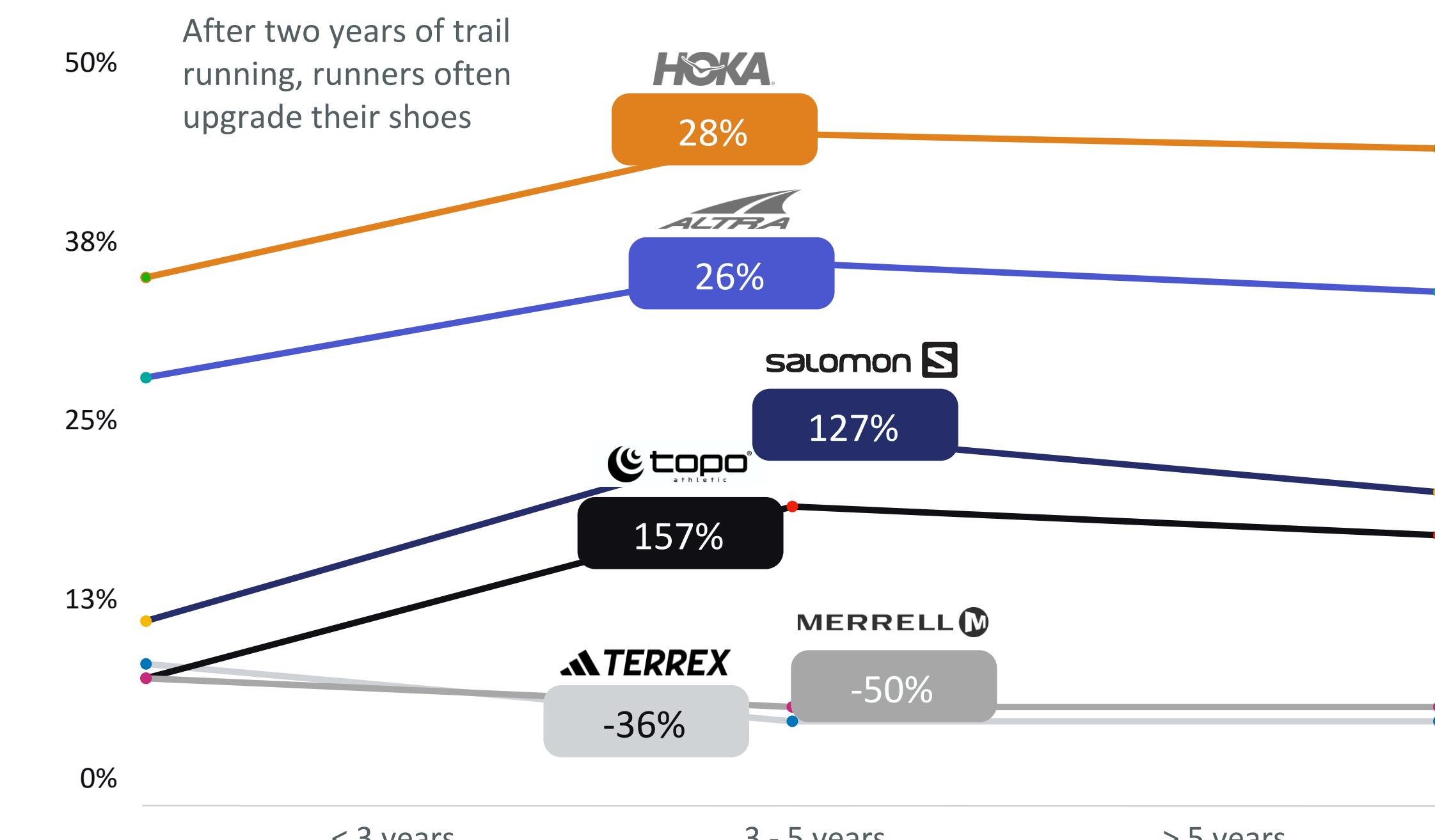
# Trail runners' favorite brands evolve with time

The trail running shoe market has clear winners



Percent of trail runners that own the shoe brand

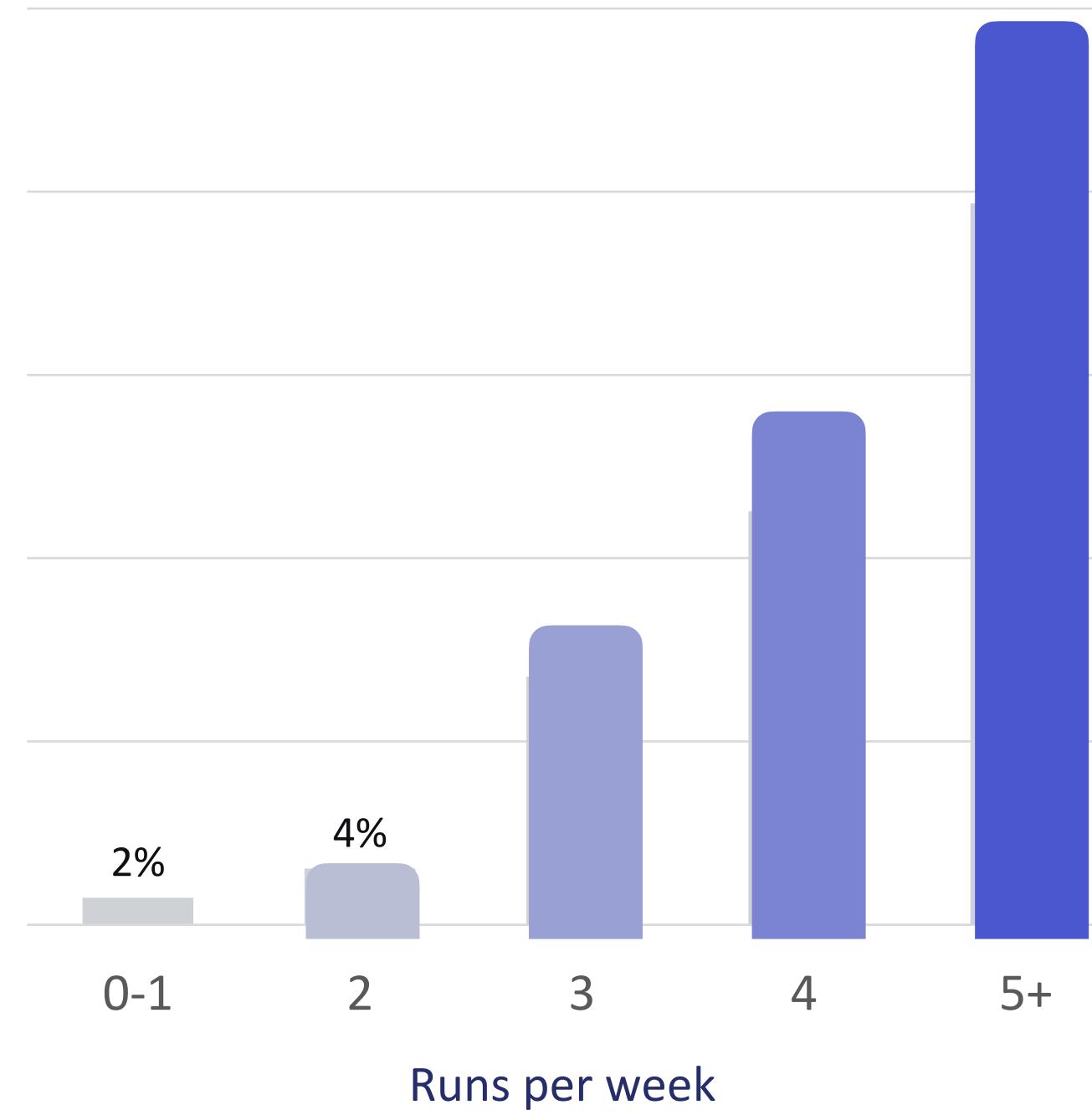
But runners' preferences change the longer they spend trail running



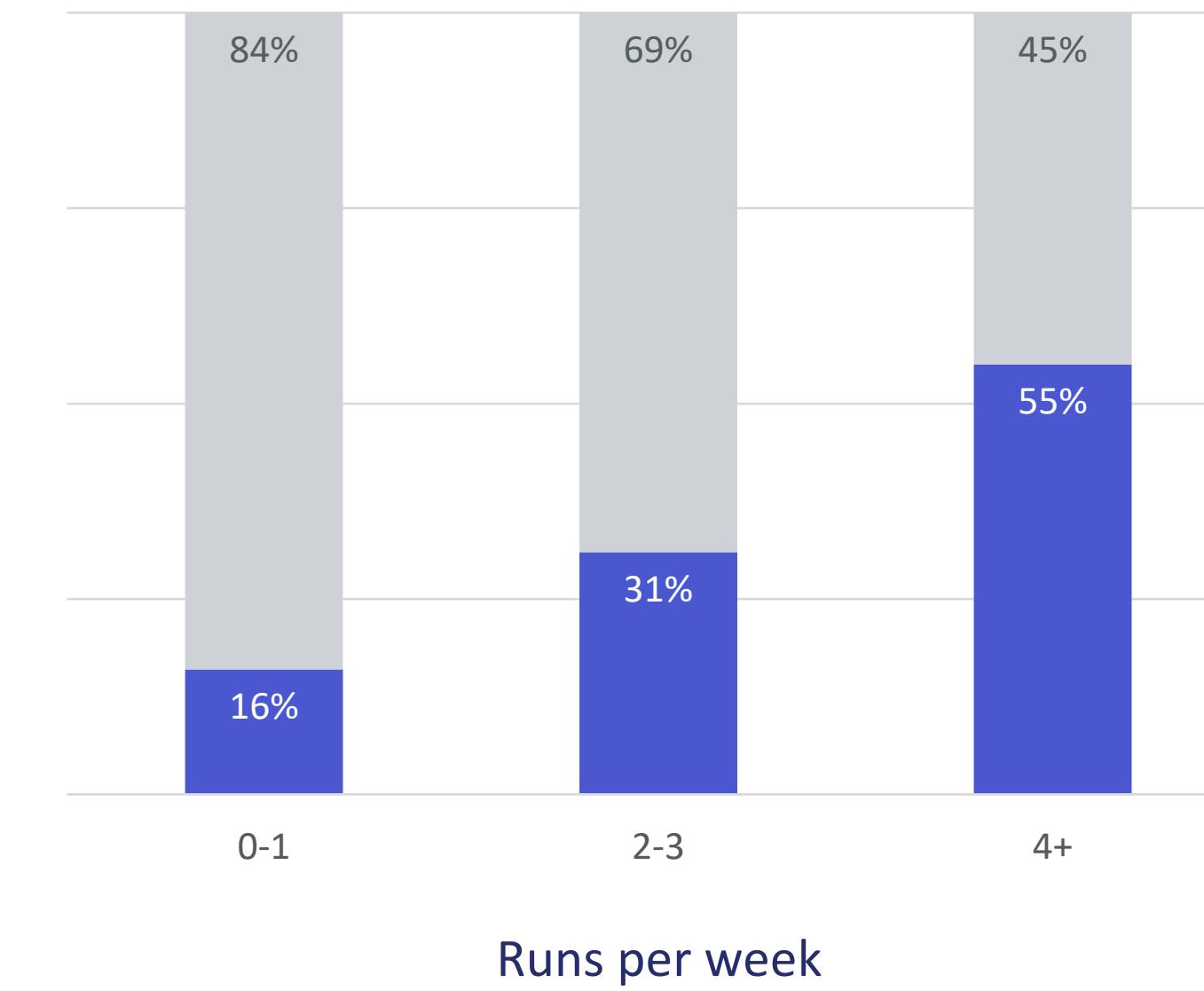
Percent of trail runners that own the shoe brand year over year

# Trail runners run hard, and their shoes pay the price

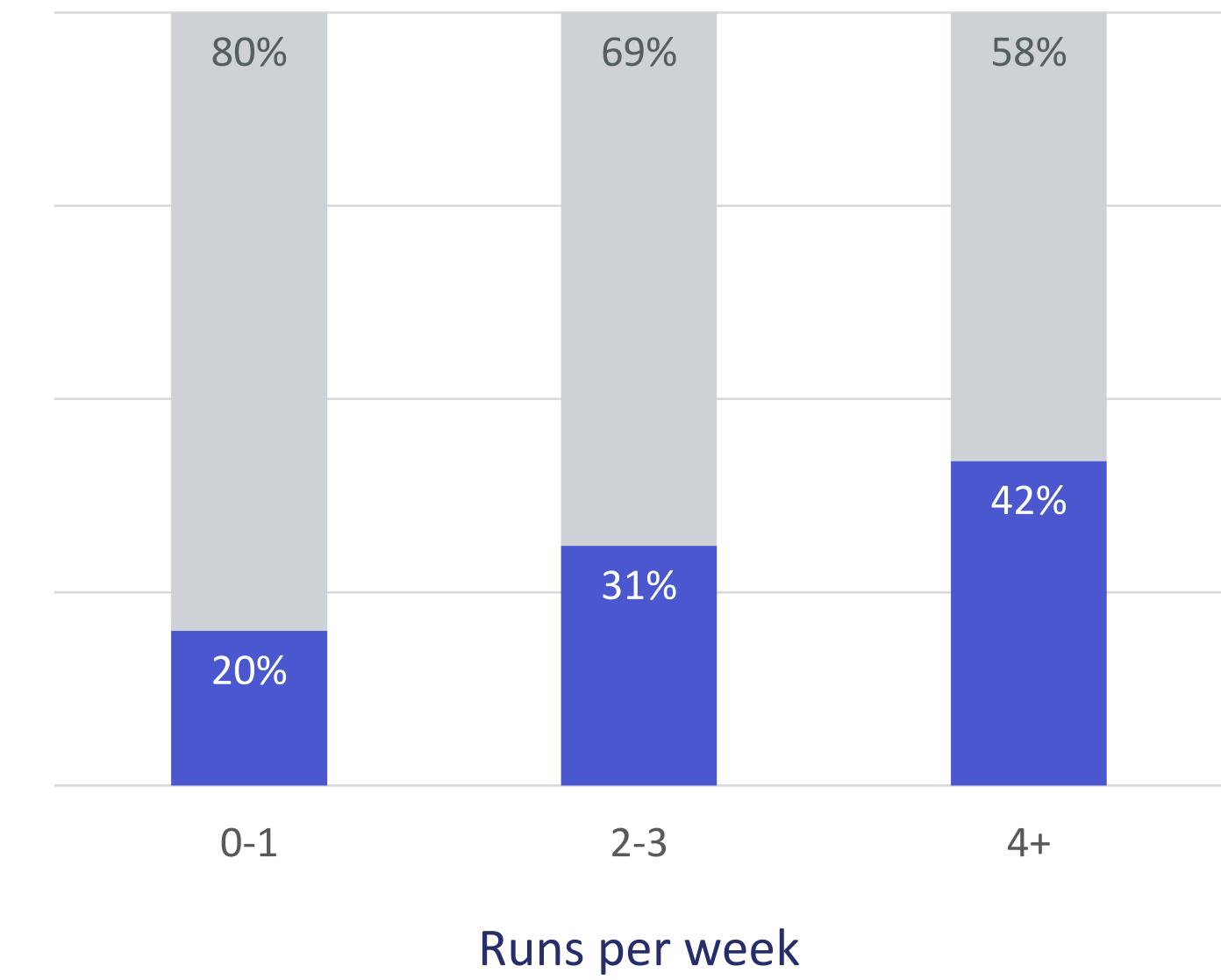
Trail runners are dedicated to their craft with 49% of them going on 5+ runs per week



This results in trail runners buying a lot of shoes



But despite the expense, dedicated runners still prioritize high-quality shoes



# Trail Running Apparel

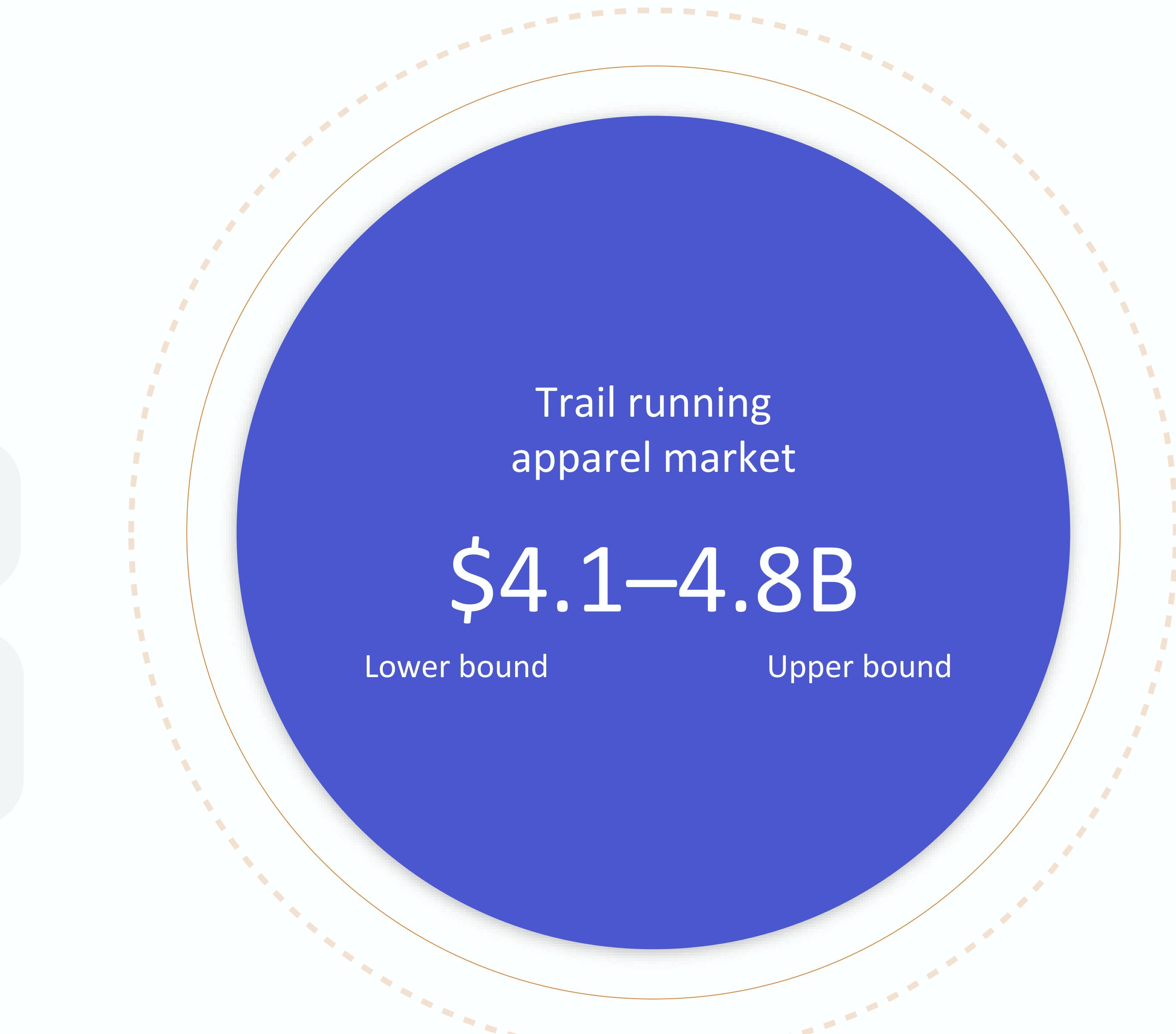
# Trail running apparel market size

97%

Trail runners purchased apparel in 2023

\$340–400

Average annual spend per trail runner on apparel



# What clothes do runners invest in?

## Strong brand loyalty

When it comes to apparel, **Patagonia, owned by 39% of runners, leads the pack**. Nike follows at 35% and Brooks at 32%. Other widely favored brands include Smartwool (32%), Janji (25%), and Salomon (26%). We can glean that runners prioritize brands with high-quality, performance-driven gear that can endure rugged conditions.

## Jackets and hats

When it comes to jackets, **Patagonia again tops the list, with 25% of respondents owning one**. The North Face and Salomon are also popular for outerwear, chosen by 13% and 9% of runners, respectively. For hats, the most common brands are Patagonia, Ciele, and Nike, showing that runners prefer trusted brands to protect them from the elements during long runs.

## Running socks and shorts

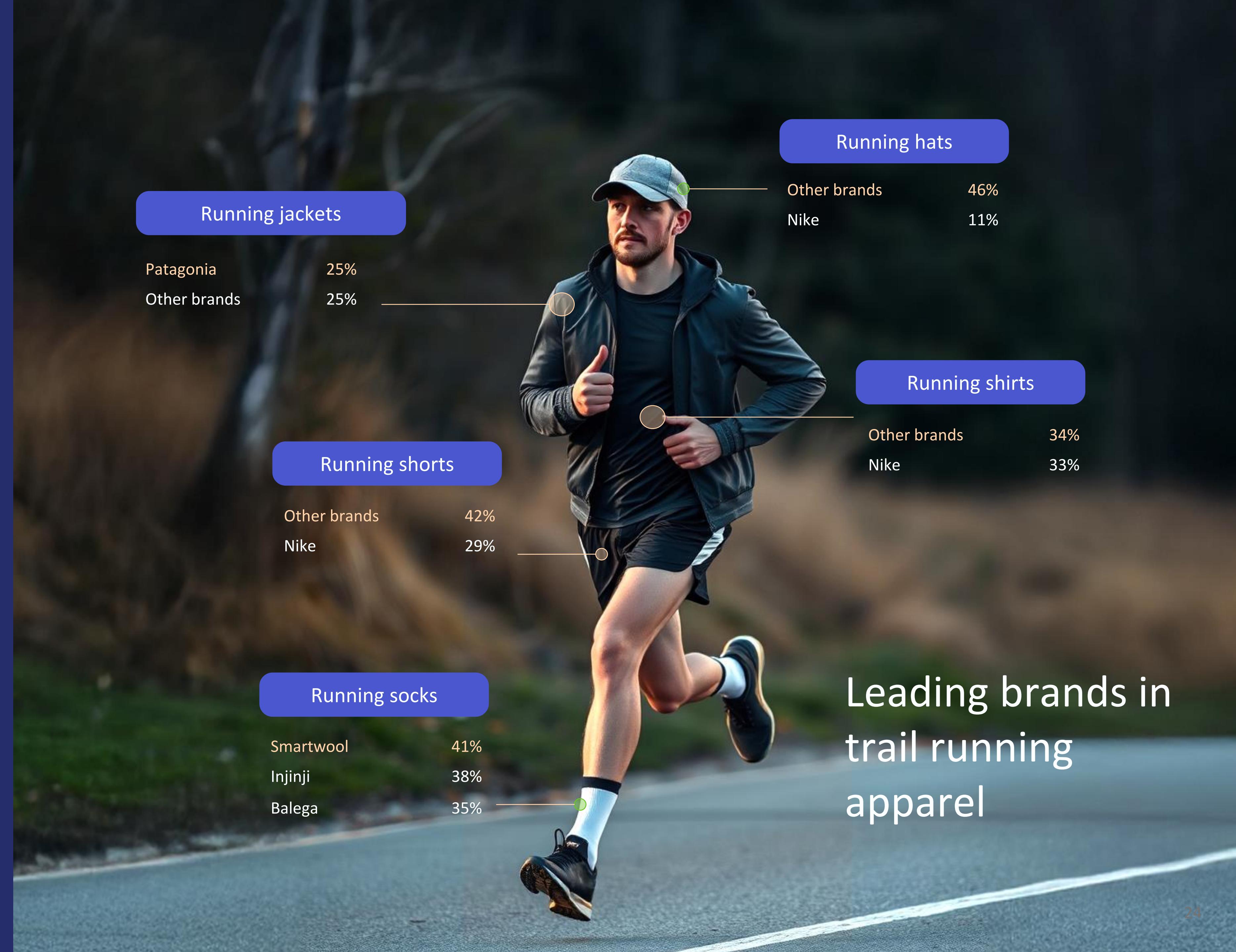
Socks are an essential part of a trail runner's gear, with **Smartwool being the most popular choice (41%)**. Other top brands include Balega (34%) and Darn Tough (33%). For shorts, Nike leads with 29% of runners owning their products, followed by Brooks at 23% and Janji at 19%.

## Significant annual spend

Trail runners are willing to invest in high-quality apparel. **Over half of respondents (52%) spent between \$100 and \$499 on trail running clothing in the past year**. Nearly 21% spent between \$500 and \$999, and a dedicated 6% spent more than \$1,000. This shows the community's investment in comfort and durability for their runs.



Nike takes 2nd spot in multiple apparel categories, as runners opt for lesser-known and unbranded options



Leading brands in trail running apparel

# Trail Running Gear

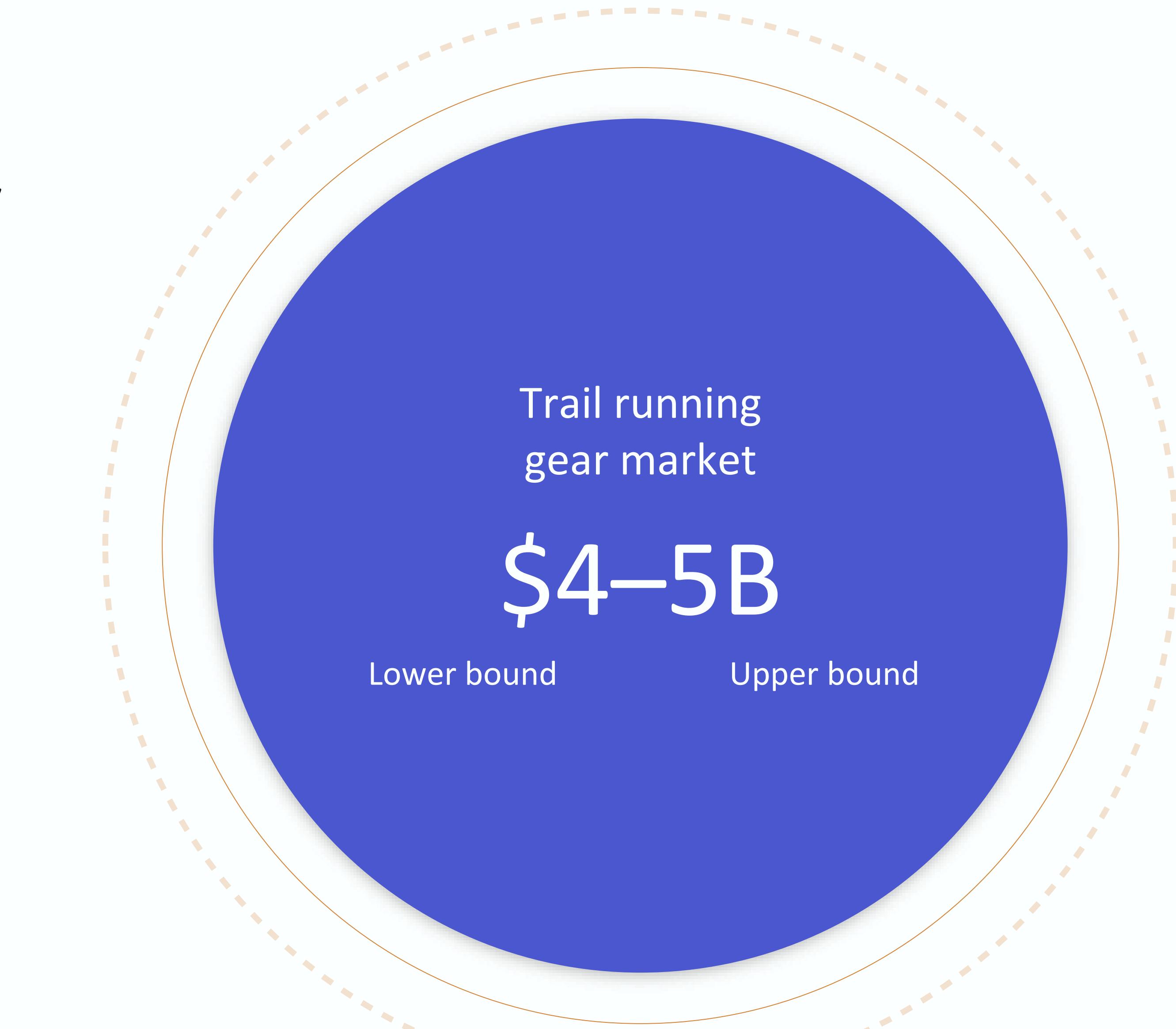
# Trail runners spend heavily on endurance-related gear

93%

Trail runners purchased running-related gear in the US

\$337–421

Average annual spend on trail running gear



Note: The market size is determined by excluding elite trail runners, with the ranges excluding additional outliers.

# What gear do trail runners rely on?

Trail runners depend on reliable gear to support them through tough terrains and long distances. From hydration solutions to weatherproof apparel, the right equipment is key to ensuring safety, performance, and comfort on the trails.

## Hydration and sun protection are musts

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**Hydration packs and vests are the most common form of gear, owned by 50% of runners.** Handheld hydration bottles (31%) are also essential for many. Sunglasses (42%) offer better visibility during long runs. Additionally, 25% of runners use wind or rainproof jackets, demonstrating their willingness to brave tough weather conditions.

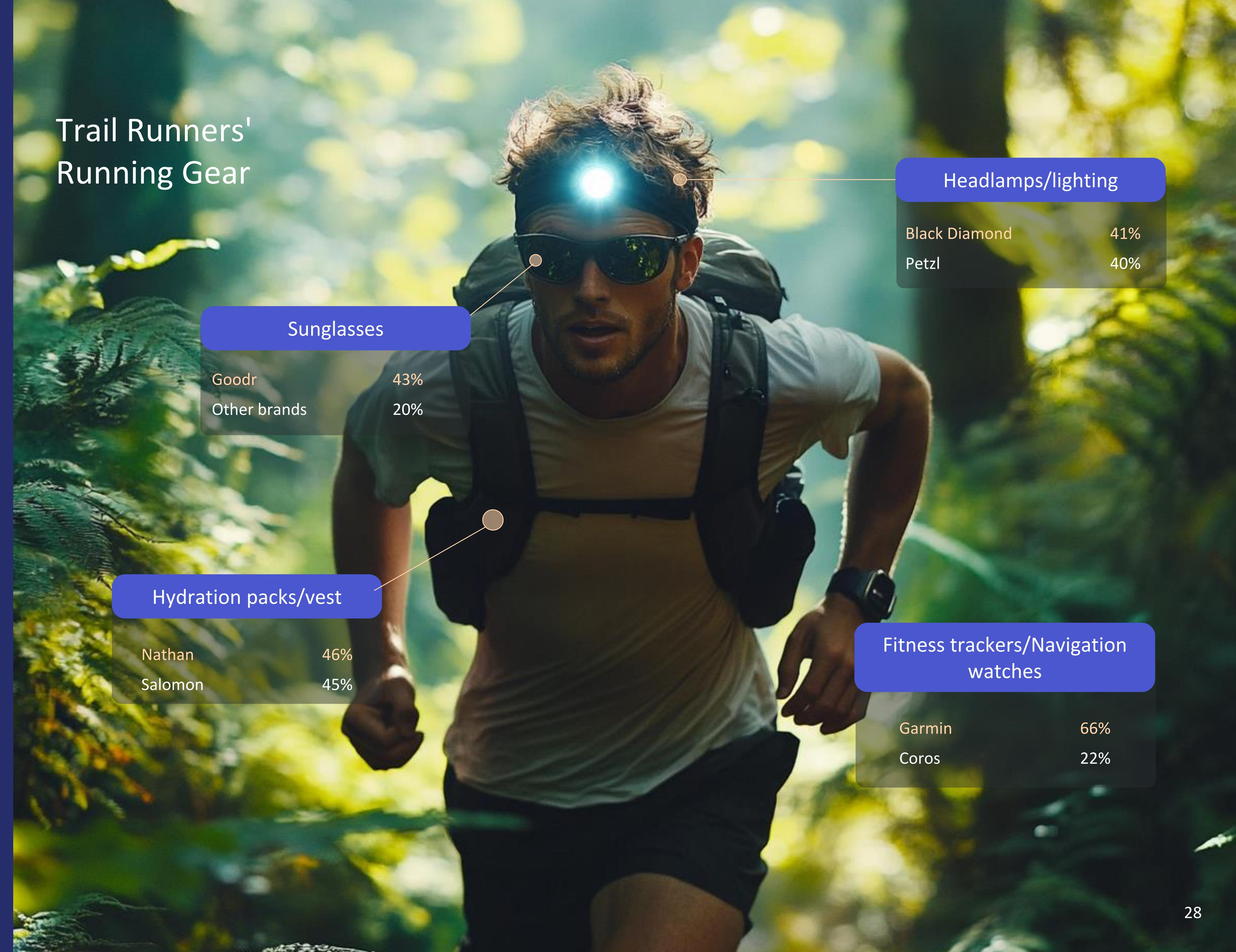
## Quality trumps affordability

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Nathan (46%) and Salomon (45%) dominate the hydration gear market, followed by Ultimate Direction (24%) and Camelbak (18%). **Nathan and Salomon are favored for what are viewed as their 'premium' offerings**, with runners citing lightness and comfort.



The running gear market has clear winners, with a few brands leading the way



# Trail Running Tech

# Trail running tech market size

**6.7M**

Number of average trail runners  
who paid for tech

**\$72–116**

Average annual spend  
on trail running  
subscriptions

Note: The market size is determined by excluding elite trail runners, with the ranges  
excluding additional outliers.

Trail running tech  
market size

**\$482–776M**

Lower bound

Upper bound



# Trail runners use tech platforms to find trails and record performance

Technology plays a crucial role in helping trail runners navigate, track their performance, and stay connected. From GPS platforms to fitness apps, runners are integrating tech tools to optimize their runs and explore new trails.



## The dominant platform: Strava

**Strava leads the way with nearly 71% of trail runners using it to track their runs and connect with others.** Garmin is another key player, used by 61% for navigation and performance tracking. AllTrails, favored by 50%, helps runners discover new trails. Other popular platforms include Coros (20%) and Gaia GPS (19%).



## Platforms have won paying subscribers

While many runners use free versions of tech platforms, a significant portion is willing to pay for premium features. **Strava remains the top paid subscription, with 37% of users opting for its advanced features.** AllTrails follows at 18%, while platforms like Gaia GPS (7%) and Garmin (7%) also attract subscribers who value enhanced navigation and tracking capabilities.



## Avg. subscriptions top out at \$100

**A large portion (45%) of trail runners spend between \$50 and \$99 annually on these services.** Meanwhile, around 12% are willing to spend \$100 to \$199, while just under 4% invest over \$200 a year in premium subscriptions.

## TRAIL RUNNING SUBSCRIPTIONS

38%

Don't pay

While some stick to free services, the majority of trail runners see the value in paying for annual subscription

62%  
Pay

	37%	\$79.99
	18%	\$35.99
	7%	\$39.99 (Basic) \$99.99 (Premium)
	6%	\$119.40 (Premium)
	2%	\$79.99
	2%	\$35.99

# Trail Running Training & Coaching Services



# Trail running training & coaching services market size

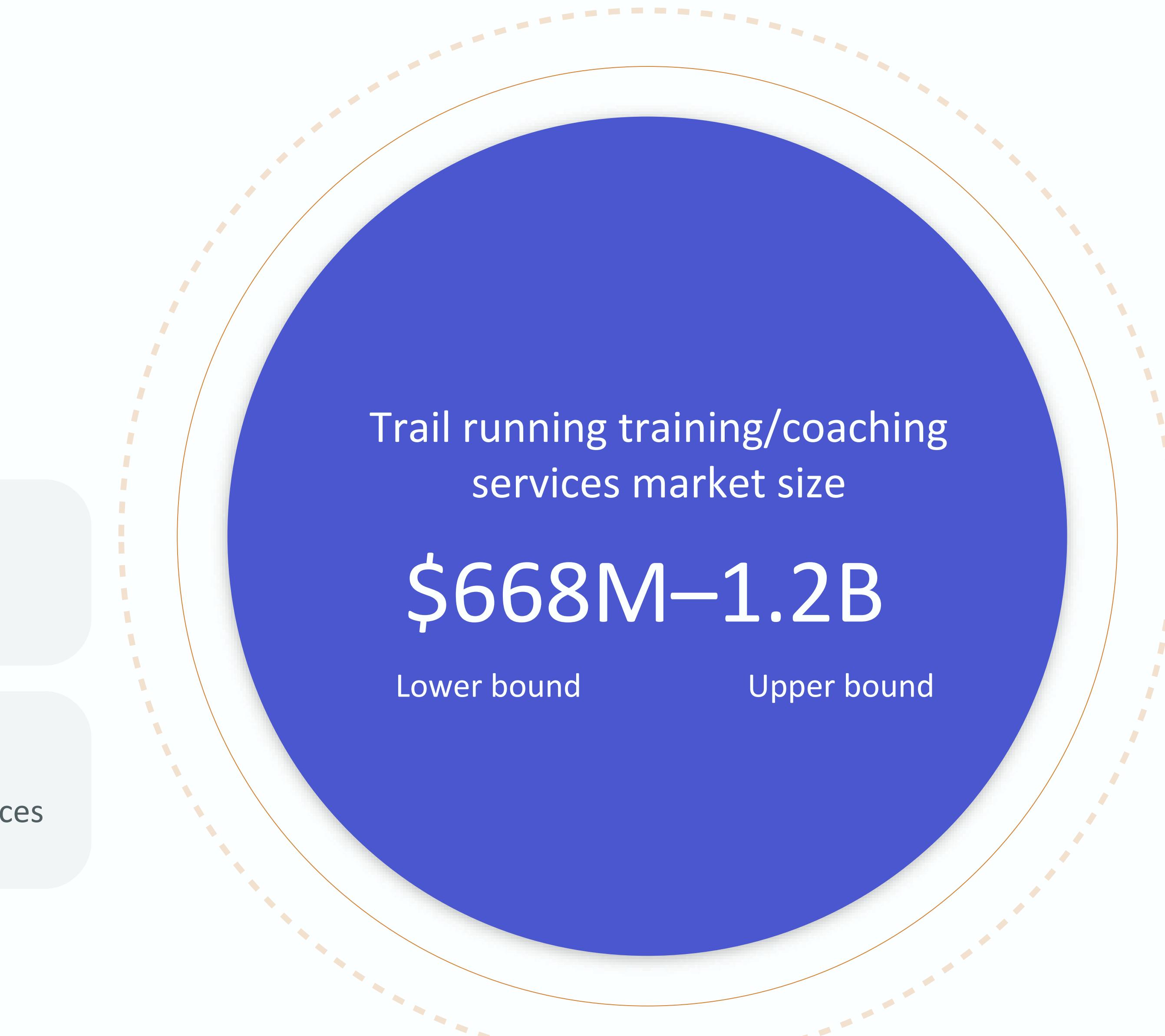
3.5M

Trail runners that pay for training and coaching services in the US

\$189–334

Average annual spend on trail running training /coaching services

Note: The market size is determined by excluding elite trail runners, with the ranges excluding additional outliers.



# Coaching and training services: a valuable niche

## The majority of runners do not pay for training

While the **majority (71%) of trail runners do not use any formal training, coaching, or nutrition services**, around 29% take advantage of coaching to improve their performance and recovery.

## Preferred platforms for coaching

Among those who pay for training services, local running clubs (17%) and personal coaches (17%) are the most popular choices. Professional coaching websites, such as CTS and Ultra Running Academy, are also utilized by 6% of respondents, while 3% use a nutrition coach.

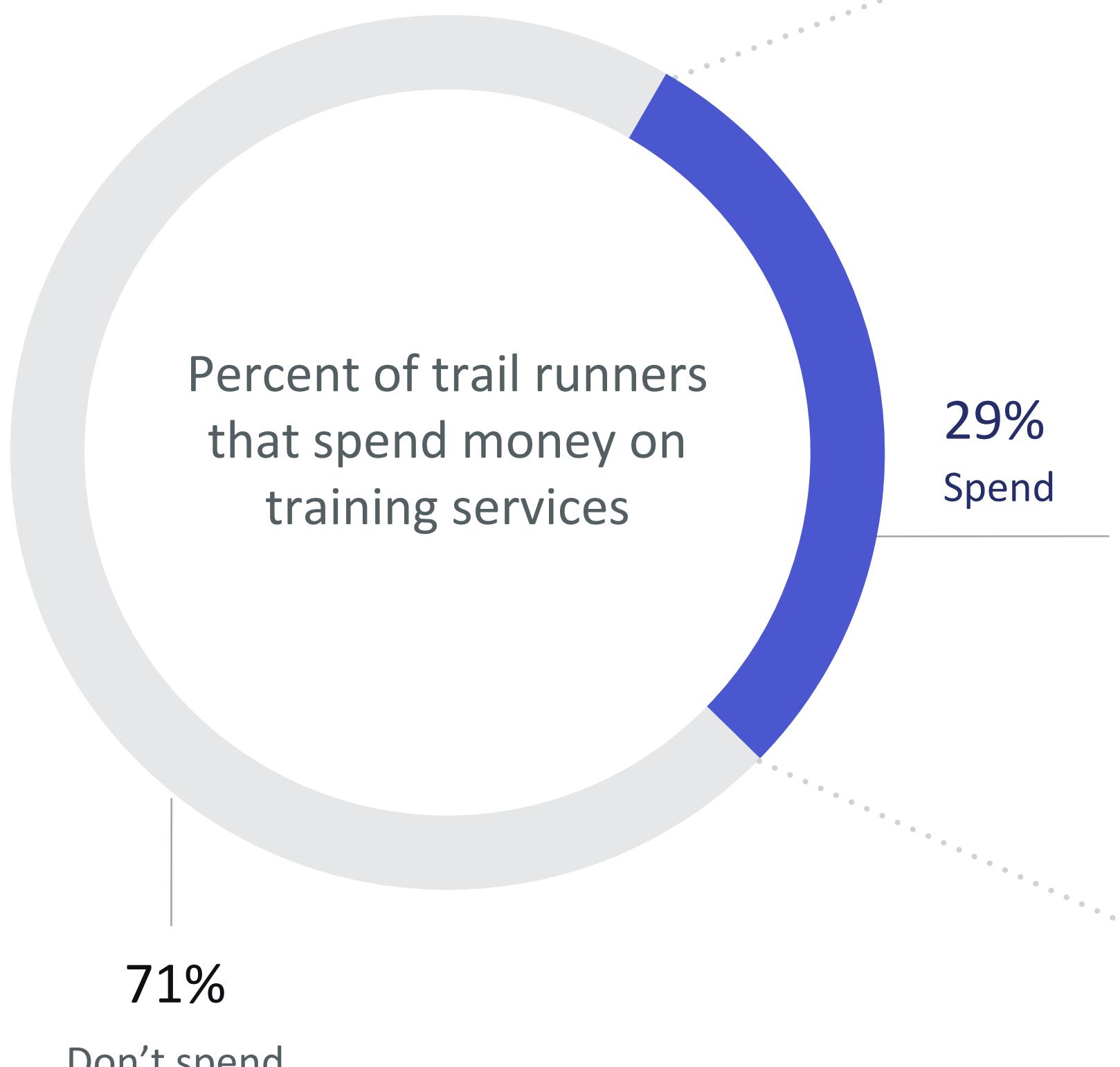
## Those who seek coaching spend \$1K+

Nearly 11% of trail runners are willing to invest \$1,000 or more per year on coaching, reflecting the value some runners place a premium on personalized guidance. Around 7% spend between \$100 and \$499, with a smaller group (4%) spending between \$500 and \$999 annually.

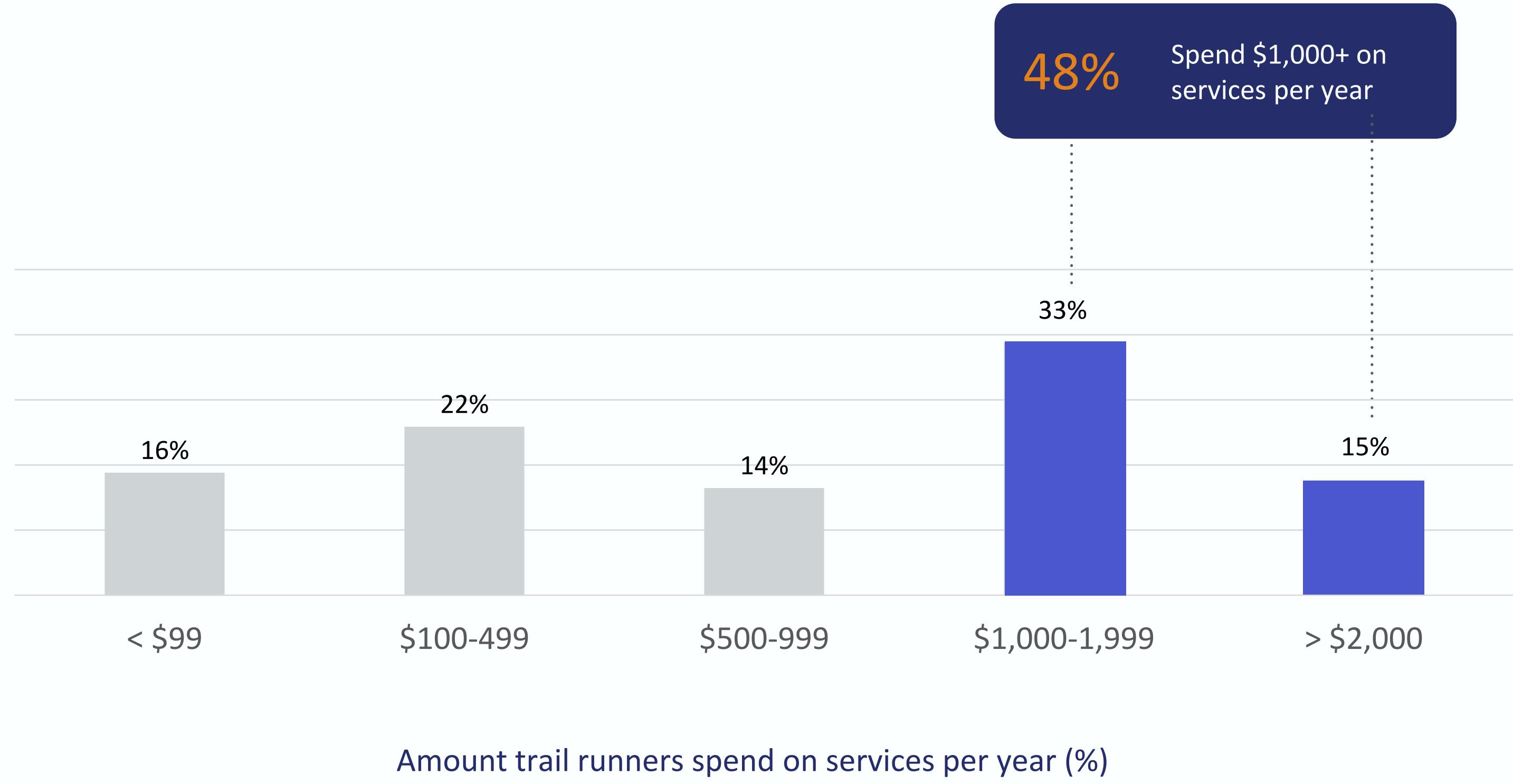


# Training services attract serious spenders

Most trail runners don't invest in training and coaching services



But those who do, spend big



# Trail Running Nutrition

# Trail running nutrition market size

10.9M

Trail runners who buy running specific nutrition in the US

\$190–312

Average annual spend on trail running nutrition

Note: The market size is determined by excluding elite trail runners, with the ranges excluding additional outliers.

Trail running nutrition market size

\$2.1–3.4B

Lower bound

Upper bound



# Trail runners seek out performance-tailored nutrition

Nutrition plays a vital role in the performance and recovery of trail runners, whether it's fueling up during long runs or enhancing recovery with supplements.

## On-trail nutrition and supplements

**A large majority (75%) of trail runners use specific on-trail nutrition products to maintain energy during their runs.** Additionally, 61% buy pre- or post-run supplements to aid in performance and recovery, reflecting the community's commitment to fueling their bodies effectively for peak performance.

## A wide range of preferred brands

**GU Energy leads the pack, used by 38% of trail runners**, followed by Tailwind Nutrition (40%) and Honey Stinger (36%). Skratch Labs is another popular choice (36%), highlighting the preference for high-performance fuel options. Other favored brands include Clif Bar (27%), Nuun (21%), and Gatorade (17%), with many runners combining products.

## Runners spend modestly on nutrition

Trail runners are willing to invest in their nutrition. While 43% spend between \$100 and \$399 annually on nutrition products, another 19% spend between \$400 and \$699. A smaller but committed group—over 11%—invest more than \$700 on supplements and on-trail nutrition each year, showing the importance of proper fueling in their overall performance.



25%

No

The majority of trail runners purchase specific “on-trail” nutrition:

75%  
Yes

The most popular nutrition brands:



Tailwind Nutrition

40%



GU Energy

39%



Honey Stinger

36%



Skratch Labs

36%



Clif Bar

27%



LMNT

27%



Maurten

16%



Nuun

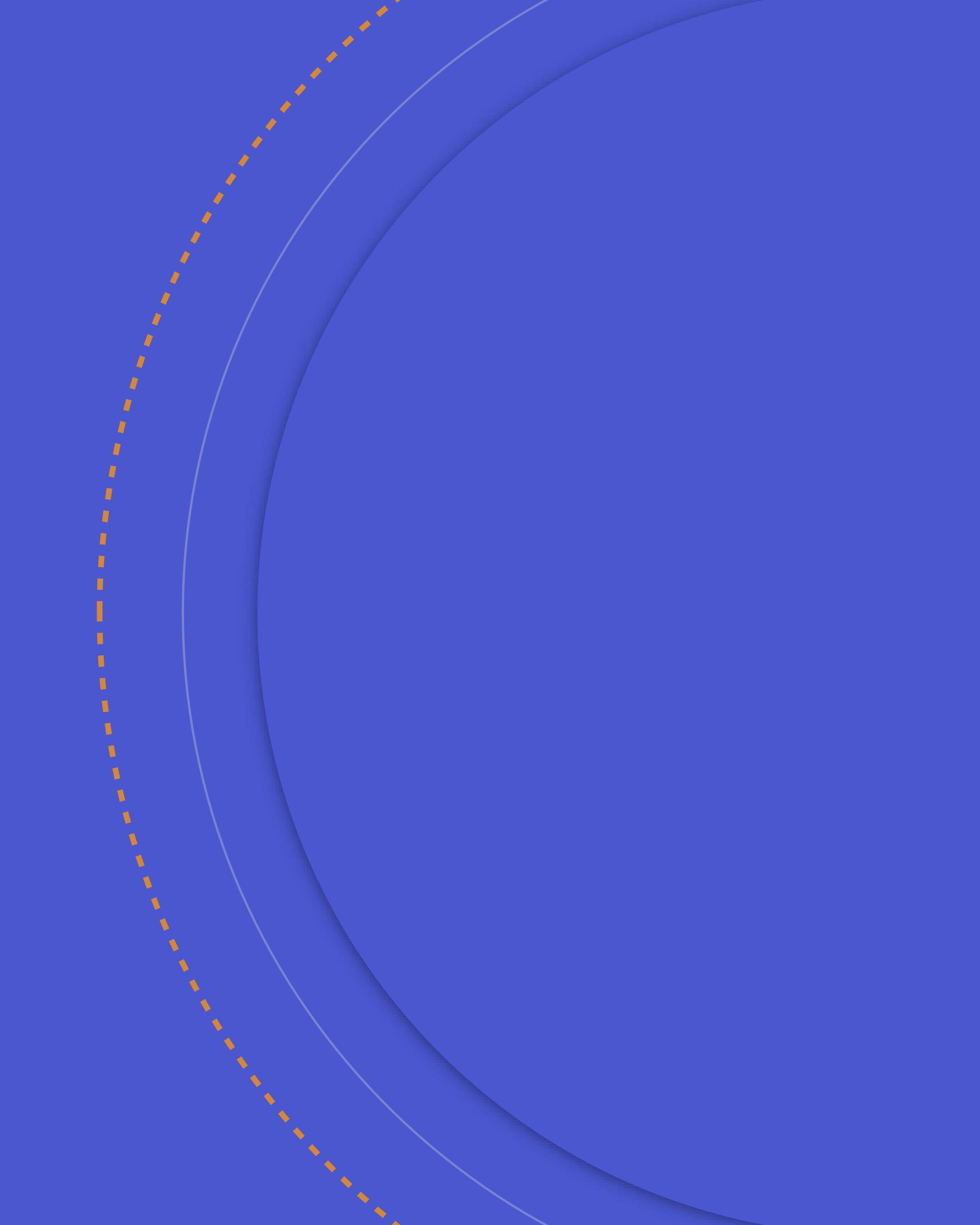
21%



Gatorade

17%

# Trail Running Media



# Trail running media subscriptions market size

4.3M

Trail runners who pay for media subscriptions

\$25–43

Average annual spend on trail running media subscriptions

Note: The market size is determined by excluding elite trail runners, with the ranges excluding additional outliers.

Trail running media subscriptions market size

\$106–186M

Lower bound

Upper bound



# What media do trail runners consume?

From podcasts to social media, runners engage with a wide variety of content.

## Highly engaged audience base

Trail runners are highly engaged with digital and social media. Nearly 79% are active on social media, and 72% regularly listen to podcasts. Websites are another popular source of information, used by nearly 70% of runners, while 35% read newsletters and 32% enjoy magazines. It's clear that the community is invested in staying connected through the latest news, trends, and stories in trail running.

## Niche subscription market

Though most runners prefer free content, some are willing to pay for premium media. About 20% subscribe to magazines, while 10% pay for podcasts. Only 2-3% of trail runners subscribe to newsletters or websites. Overall, 64% of runners spend nothing on subscriptions, while 22% spend up to \$99 annually.



# Trail Running Travel



# Trail running events drive massive spend in local communities



Note: The market size is determined by excluding elite trail runners, with the ranges excluding additional outliers. To calculate the number of trail runners in the US, we relied on third party sources, that reported there are 3,600<sup>1</sup> trail running events per year globally. We can assume that similar to other running events ~39% of those happen in the US. With an average of 133<sup>2</sup> participants per race, the annual participation in trail running events in the US is 191,520.

Source: <sup>1</sup>RunRepeat; <sup>2</sup>State of Trail Running

# Travel is an essential part of the trail running experience

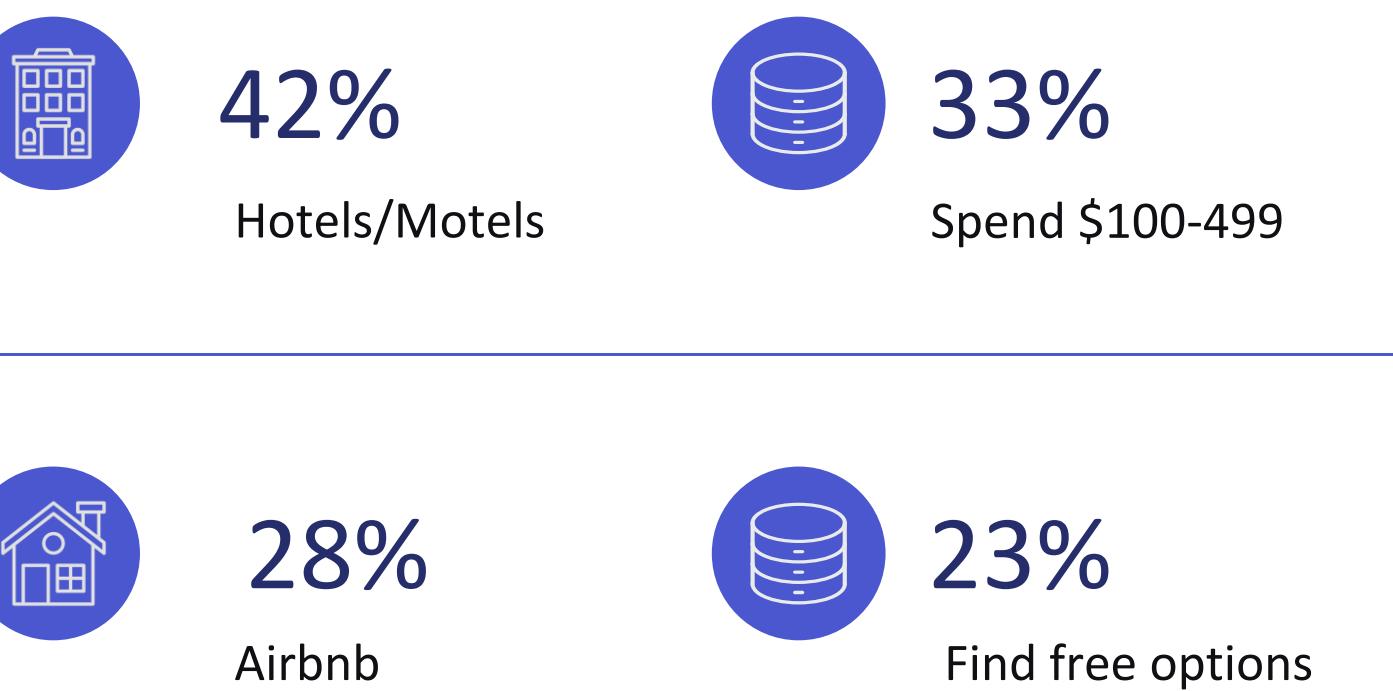
With many runners heading to remote or scenic venues for weekend getaways or longer stays, trail runners are willing to invest in transit and accommodation.

## Races involve overnight stays

Trail runners often make race weekends a short trip, with 39% staying for one night and 32% spending two nights at the race venue. A dedicated 9% stay for three or more nights, turning the event into a longer adventure, while 20% of runners do not stay overnight at all, likely choosing local races or quick day trips.

## Hotels and motels are a must

When staying overnight, 42% of trail runners opt for the comfort and convenience of hotels or motels. Airbnb is also a popular choice, with 28% preferring the flexibility it offers. For those who want a more rugged experience, 17% choose camping or tents, embracing the outdoor spirit of trail running. A smaller group (4%) sleeps in their car for ultimate cost savings.



# What are trail runners' eating habits during events?

## Runners fuel up in different ways

Trail runners have diverse eating habits when it comes to race events. Around 41% prefer to eat at local restaurants near the venue, enjoying the local cuisine while fueling up for their races. Another 26% prepare their meals at home and bring them along, while 23% bring pre-prepared food to the event. Only 10% opt to buy food from local stores near the venue, reflecting a more spontaneous approach to nutrition.

## Most pay for at least one large meal at venues

When it comes to food spending, most trail runners (47%) budget between \$50 and \$199 over the course of the year for meals near race venues. A dedicated 17% spend between \$200 and \$499, while 6% invest more than \$500 in food. A smaller group (11%) spends nothing, likely preferring to bring their own meals from home.

**41%**

Prefer eating at a local restaurant near the venue

**47%**

Spend \$50-\$199 annually on food near race venues



# Race Organizers

# Behind the scenes of organizing trail events

Organizing a trail race is much more than finding a scenic route and attracting runners. Here's what goes into it:

## Permits:

Securing permits from agencies like the Bureau of Land Management (BLM) and U.S. Forest Service (USFS) is crucial. These organizations often limit participant numbers, which restrict race size.

## Fees:

Permits come with various fees and user charges, increasing the complexity of getting a race off the ground.

## Insurance:

Organizers must first secure insurance to cover injuries and accidents to get approval from land agencies.



# The economics of trail racing

~20%  
profit margin

Organizers incur costs for staff, permits, insurance, race-day needs, transportation, and equipment, leaving an average of ~20% profit margin.

Often, they rely on grants and brand partnerships to cover initial expenses.

## Tips for Race Organizers

Start simple and seek volunteers and brand partnerships to offset costs.

Engage the local community to build a loyal runner base and grow organically.

Focus on value—runners expect more than just a race (e.g., food, music).



# Professional Runners

# Professional trail runners face challenges and opportunities

With trail running gaining momentum, athletes are racing to turn their passion into full-time careers. But the reality is, only a few elite runners can make enough to live solely off trail running.

## Challenges

Non-Disclosure Agreements (NDAs) prevent athletes from discussing their sponsorship terms. Without transparency, it is difficult to negotiate fair compensation.

Livable sponsorships are rare and mostly reserved for elite runners. Most athletes depend on side jobs, like coaching, to support themselves.

The financial barriers to entry are high. Travel costs and race fees for key events add financial strain and limit opportunities for sub-elite runners.

“For me, trail running is not just about the races; it’s about building connections, telling stories, and making a positive impact in the community.”

Professional ultra-trail runner

## Opportunities

Major race events like UTMB and Western States are drawing more media attention, potentially increasing prize money and sponsorships for more athletes.

Social media allows athletes to gain visibility and build a community, helping them connect with fans and making them more appealing to sponsors.

The grassroots nature of trail running fosters a strong sense of connection and creates opportunities for runners to engage with their local communities.

“Trail running started as a fun hobby with friends, no goals—just passion. A surprising 2:53 marathon led to trail races, first wins, and personal records. It’s been a journey of growth, fueled by love for the sport.”

Professional trail runner & Athlete manager

# Trail runners also face a steep financial climb

Trail runners earn far less than elite road runners due to weaker sponsorships, media coverage, and prize money. Greater transparency could attract sponsors, boost earnings, and help trail running compete with top endurance sports.

## Typical earnings of trail runners:

### Mid-tier pro trail runner:

\$50K - sponsorships

\$20K - side coaching

### Top-tier (e.g., ultrarunning champion, Tara Dower):

~\$250,000 - sponsorship with one brand

## Income sources:

Sponsorships, coaching, bonuses, travel expenses, and health coverage

## Trail runners earn significantly less than their road runner counterparts:

### Elite marathoners like Eliud Kipchoge:

\$750,000+ annually in sponsorships

### Prize money at major marathons:

\$150,000+

### Prize money at top trail races, UTMB: \$10,000.

This gap underscores the differences in media visibility, sponsorship interest, and prize structures between the two disciplines.

## The case for transparency in trail running

A lack of transparency in sponsorships and income is holding back the growth of trail running as a professional sport. Unlike major sports, where public earnings reports establish benchmarks and attract sponsors, trail running remains opaque, making it harder for athletes to secure fair compensation and for brands to evaluate their investments. Greater transparency would not only attract sponsors but also encourage talent to pursue the sport and create benchmarks for equitable earnings.

Increased visibility

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Better sponsorship deals

Media + merch

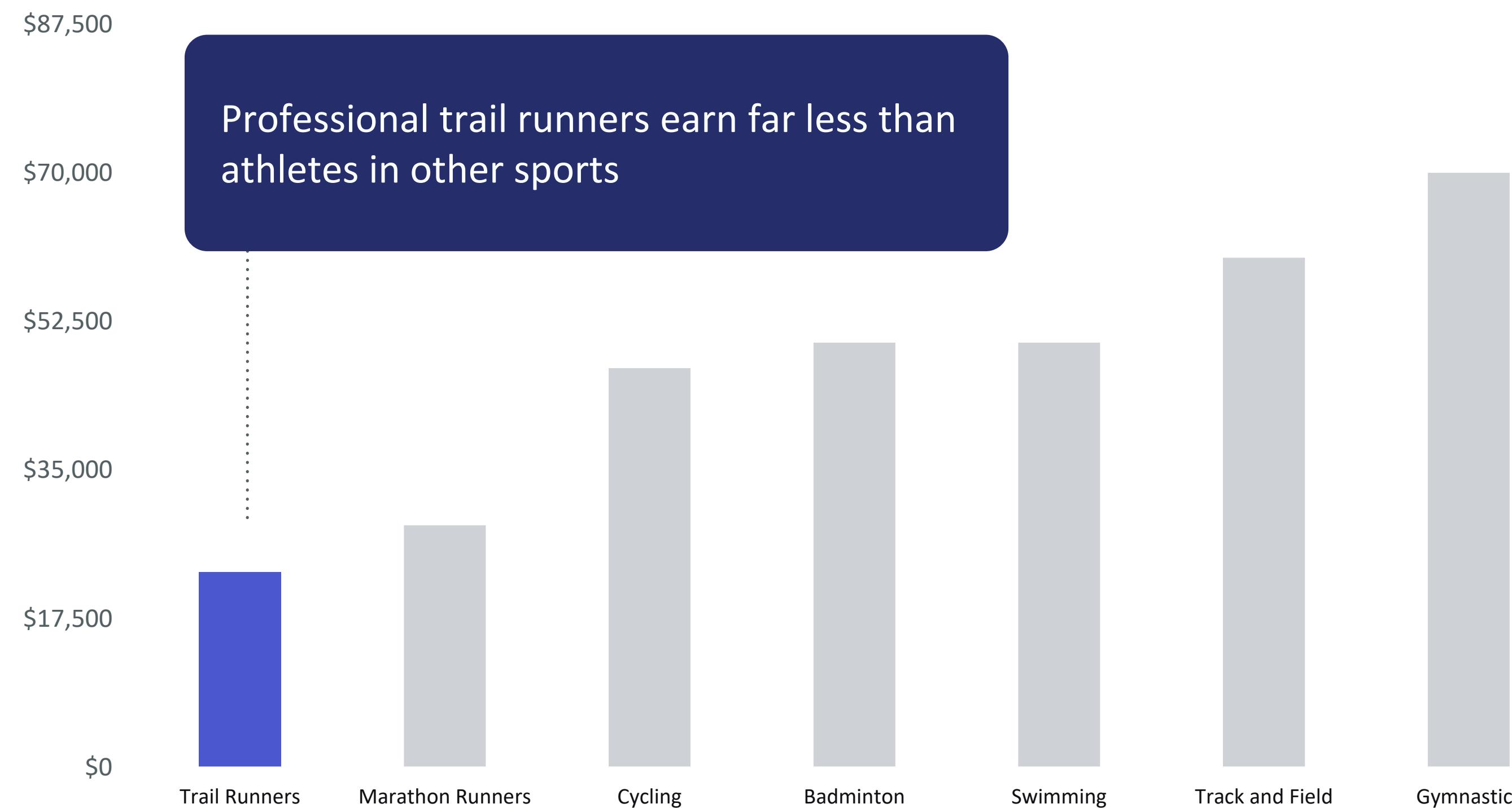
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new revenue streams

By closing gaps, trail running can rival top endurance sports

# How much do professional trail runners earn compared to other athletes?

Earnings per year



Professional trail runners earn far less than athletes in other sports

Trail running's rising popularity is an untapped opportunity for brands to sponsor athletes and reach affluent consumers.

231%

Growth rate of trail running participation in the last 10 years

# Conclusion

# Trail running: a holistic lifestyle fueled by community engagement

The trail running market has grown into a thriving **\$14-20B** industry

Fueled by dedicated and affluent consumers, the sport is set to maintain its upward trajectory, bringing growth opportunities for brands and communities.

## More than a hobby

### Long-term commitment

Most trail runners are in it for the long run, with decades of weekly participation.

### Competitiveness

Though trail runners practice individually, most are drawn to competitive events like races.

### Nature enthusiasts

Trail runners are outdoorsy and also enjoy open-air activities like hiking and camping.

## Social connection is key

### Media

Podcasts and social media are a crucial part of the trail running experience.

### Events

Competitive group events provide an important motivation for runners to test their limits.

## Dedication requires investment

Trail runners look to frequently upgrade their gear, nutrition, and tech. They are active in researching the best brands and rely on online communities and media for recommendations.

# Information to empower the trail running community

We began this project with the goal of generating positive change for the trail running community. We hope that the information and insights in this report inspire members of the community to act on their ideas, dreams, and ambitions to elevate the sport.

## Selected areas for improving the trail running community

### Capitalize on a growing market

Invest in coverage, media, events, brands, and more to leverage the strong trajectory of a sport that has grown ~12% YoY since 2010

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### Increase diversity of backgrounds in the sport

Grow accessibility of trail running to a wider array of people via lowering barriers to entry and promoting broader representation

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### Elevate and professionalize the sport

Provide sufficient support and resources for professional trail runners by highlighting the value they provide to the sport and brands



# Thank you

## CONTACT

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# Appendix

# Survey Questions and Responses

Survey question:

Q1

What is your gender?

## Gender of Trail Runners



Insight:

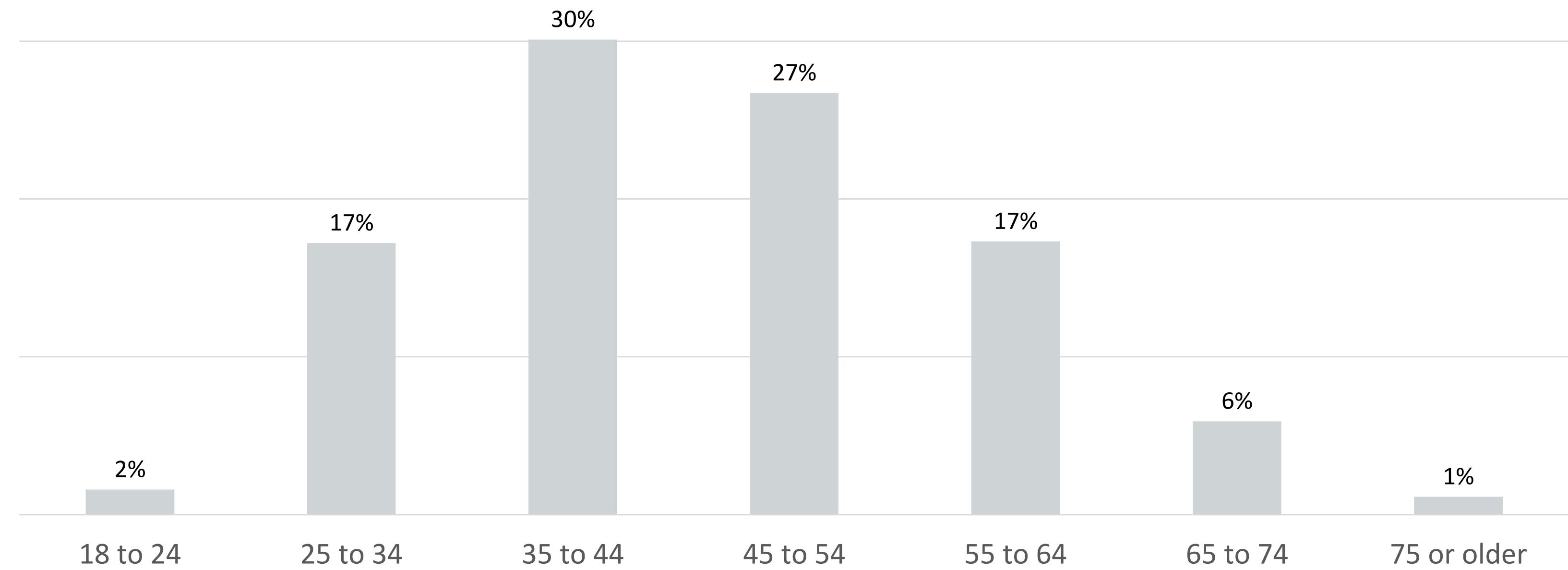
Trail running has nearly equal participation between males and females, with 1% identifying as non-binary.

Survey question:

Q2

What is your age?

## Age of Trail Runners



Insight:

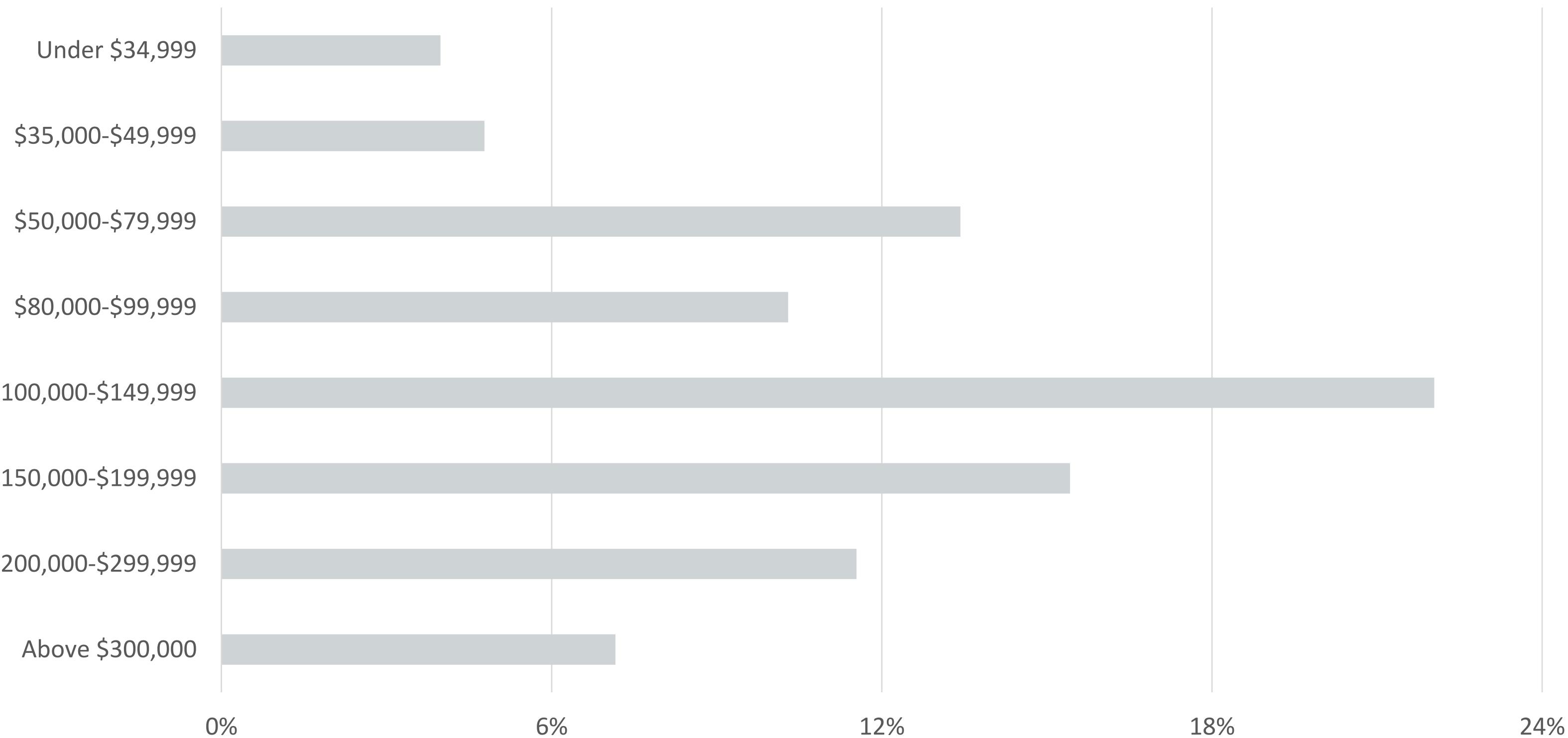
Most trail runners are between 35 to 54 years old, with fewer younger runners (18 to 24) and hardly any older participants (75 or older) out on the trails.

Survey question:

Q3

What is your gross annual household income?

## Gross Annual Household Income of Trail Runners



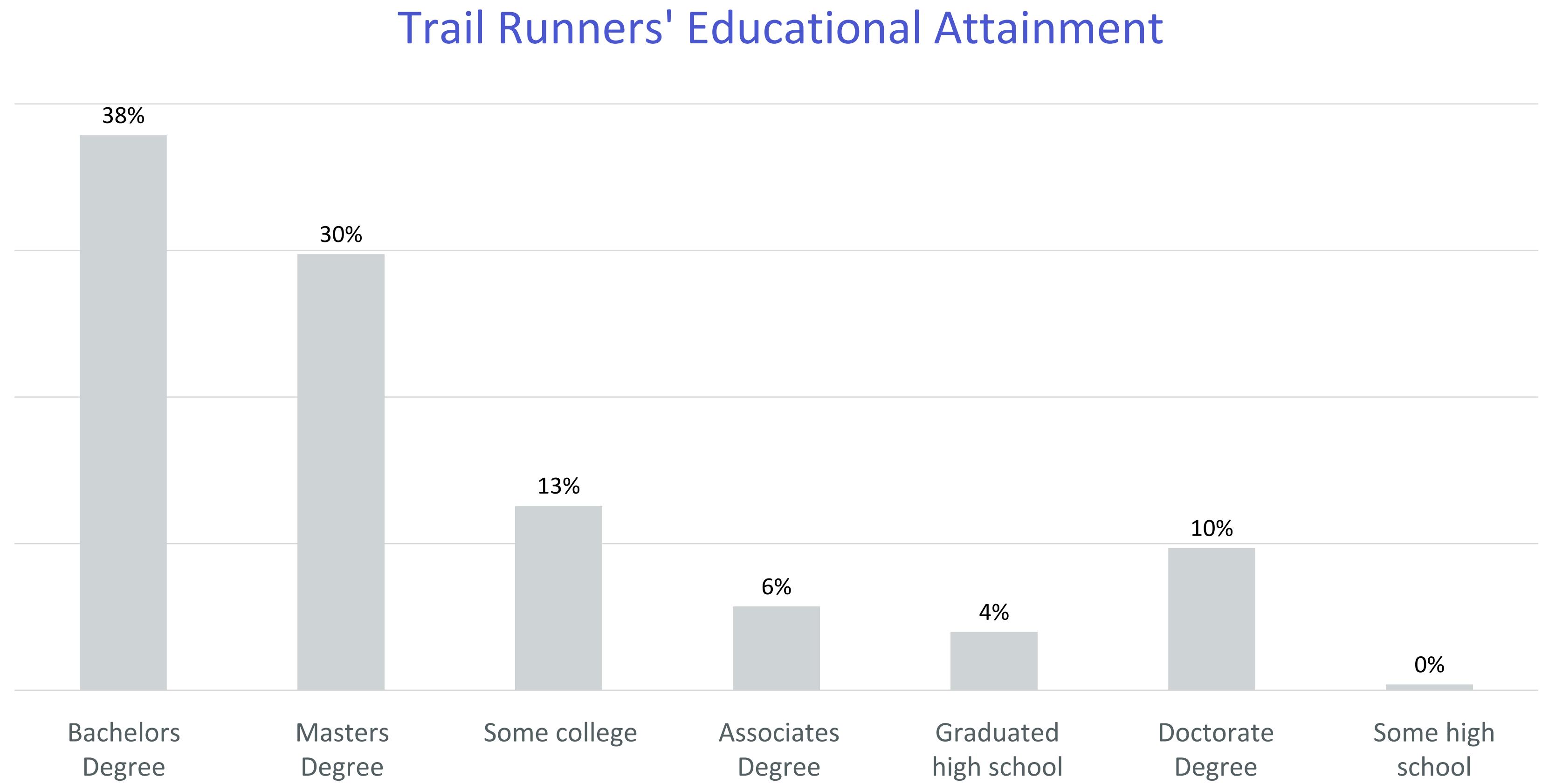
Insight:

Trail runners come from a diverse range of household income levels, with the largest group earning between \$100,000 and \$149,999

Survey question:

Q4

What is your highest level of education?



Insight:

Trail runners are well-educated, with approximately 68% possessing either a Bachelor's or Master's degree, and 9.7% holding a Doctorate.

## Survey question:

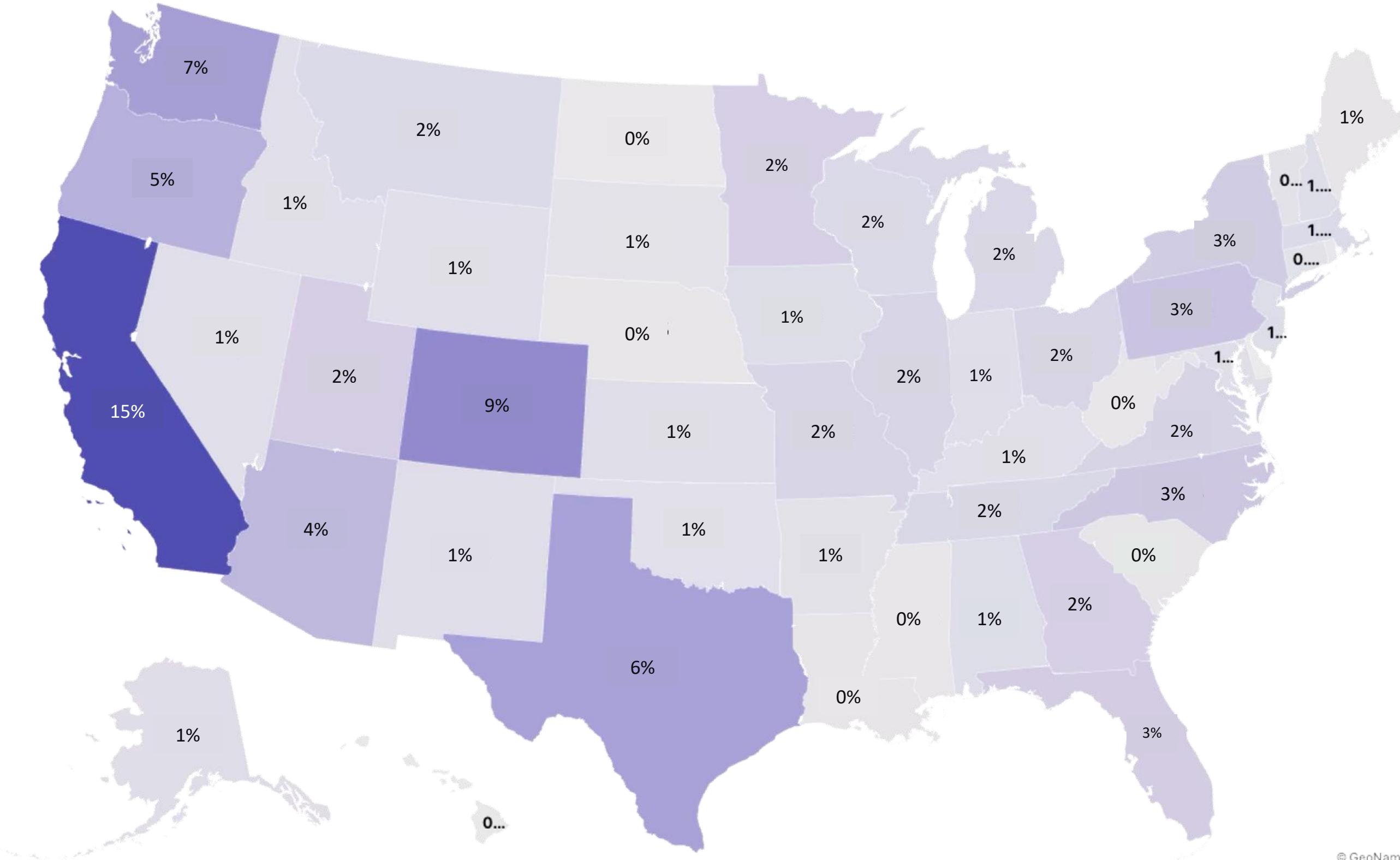
Q5

# Which state do you live in?

# Insight:

The largest concentration of trail runners live in California (15%), Colorado (9%), and Washington (7%)

# Distribution of Trail Runners by State

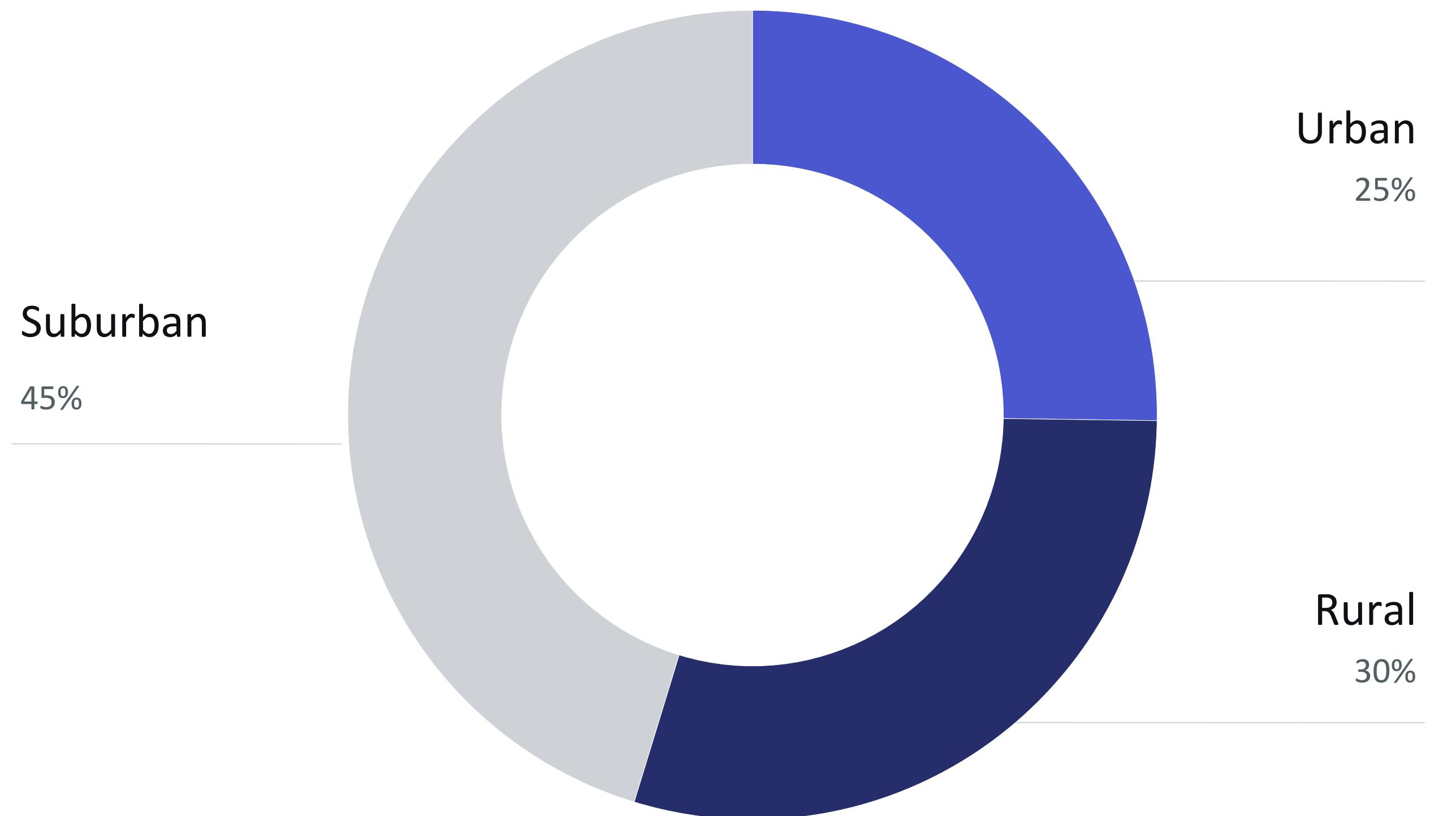


Survey question:

Q6

How would you describe the area you live as?

## Residential Areas of Trail Runners



Insight:

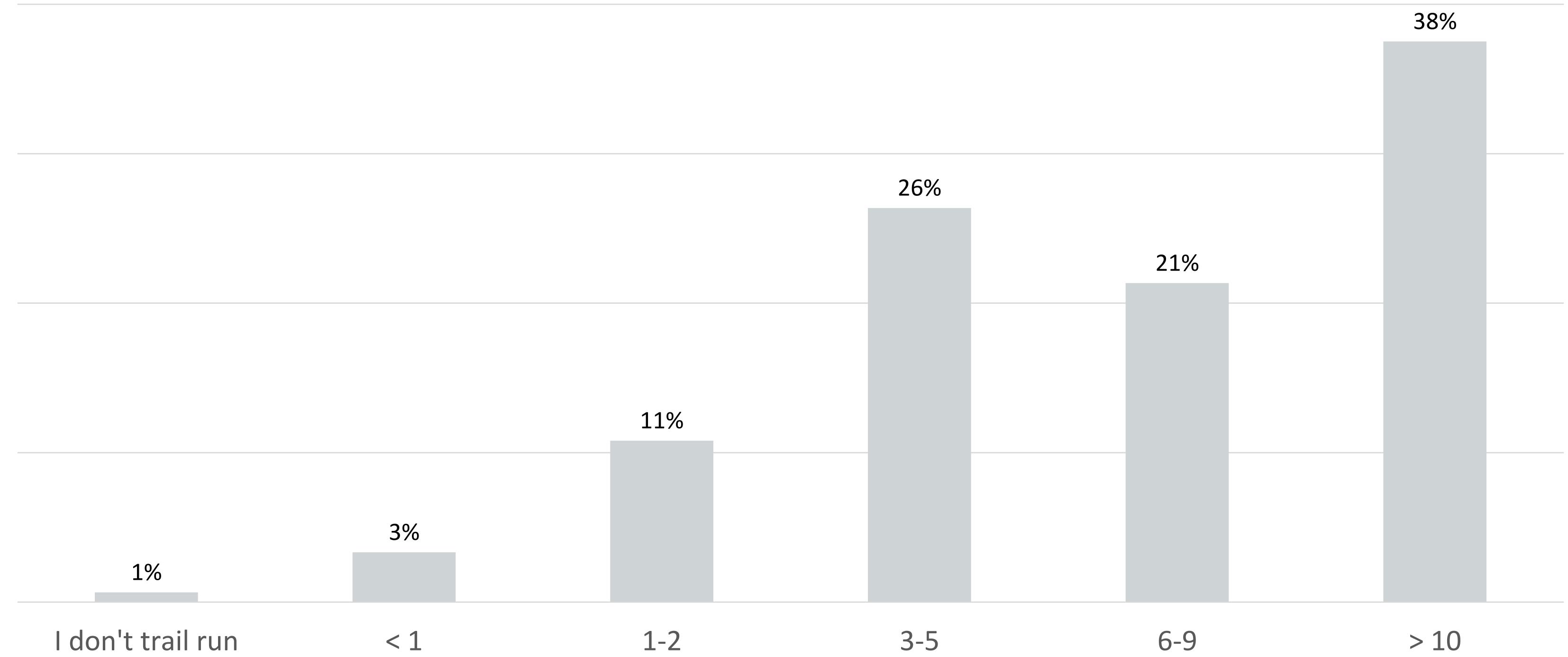
Most trail runners live in suburban areas (45%), with a more even split between rural (29%) and urban areas (25%).

Survey question:

Q7

How many years have you been trail running?

## Years of Trail Running Experience



Insight:

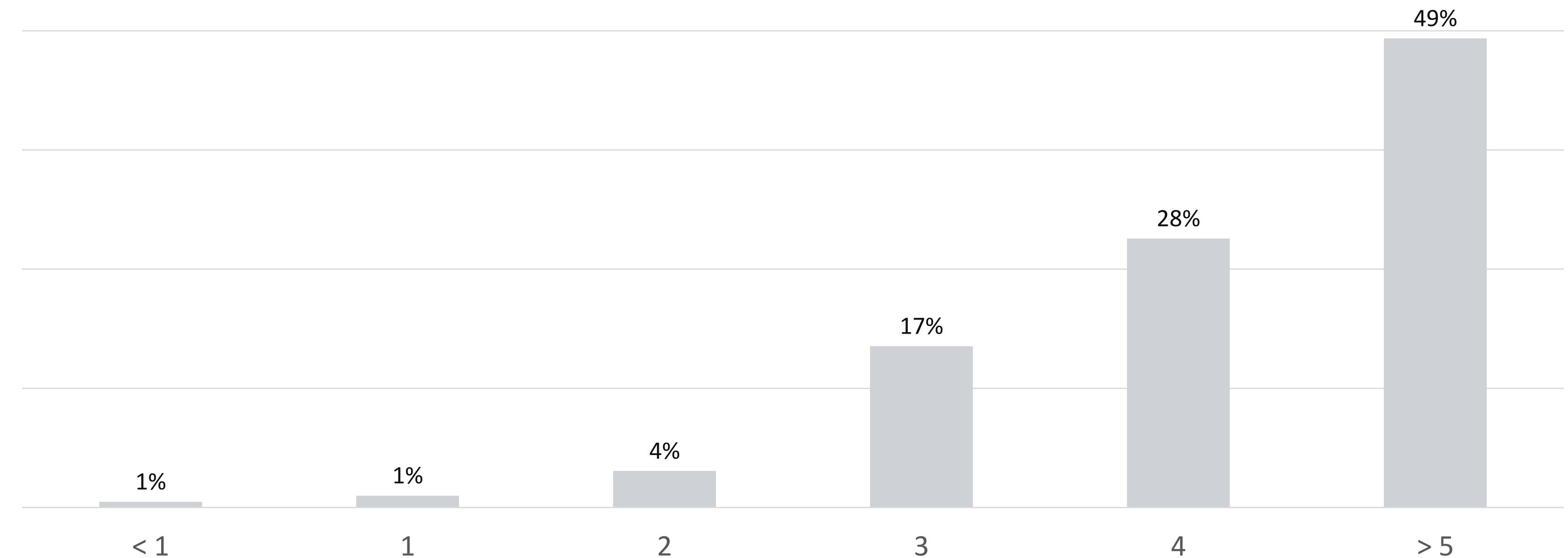
The majority of respondents (38%) have been trail running for more than 10 years, with 26% having 3-5 years of experience, indicating a well-established community of experienced trail runners.

Survey question:

Q8

How many times per week do you run?

## Trail Runners' Weekly Trail Running Frequency

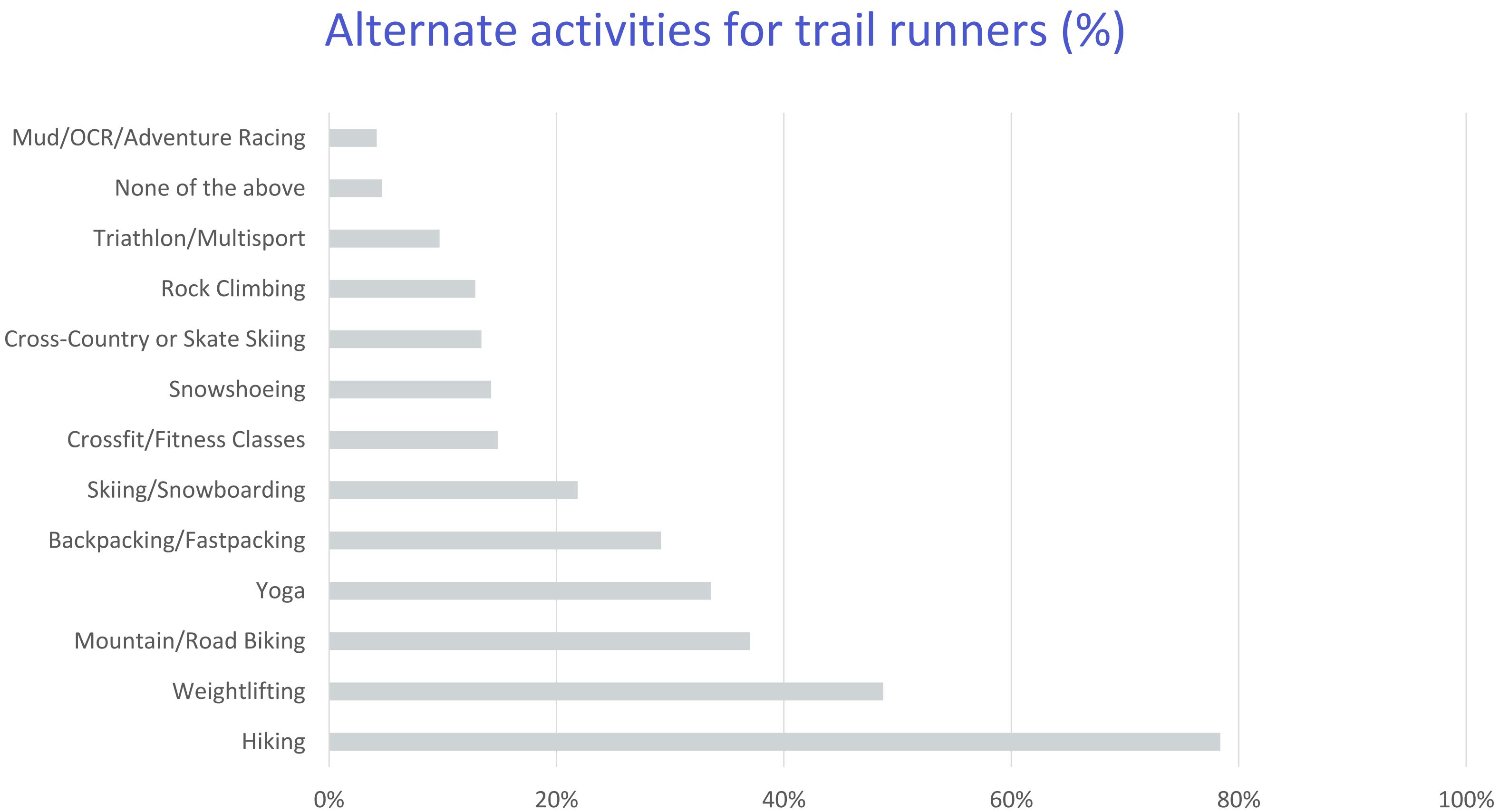


Insight:

Nearly half of the respondents (49%) run more than 5 times per week, with 28% running 4 times a week, indicating that most trail runners have a high weekly running frequency.

Survey question:

Q9 What activities do you participate in other than trail running?



Insight:

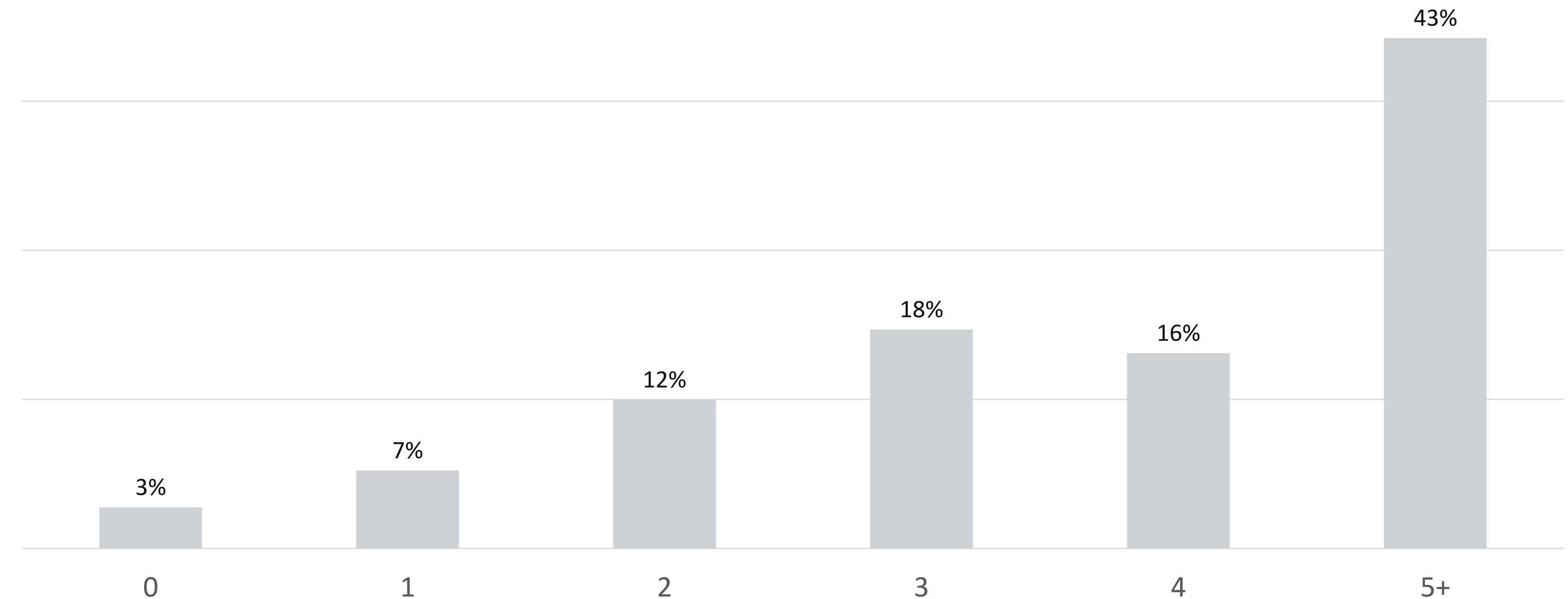
Unsurprisingly, almost 80% of trail runners go hiking. But surprisingly, almost half of them also lift weights.

Survey question:

Q10

How many races did you sign up for in the last 12 months?

## Races Joined in the Last 12 Months



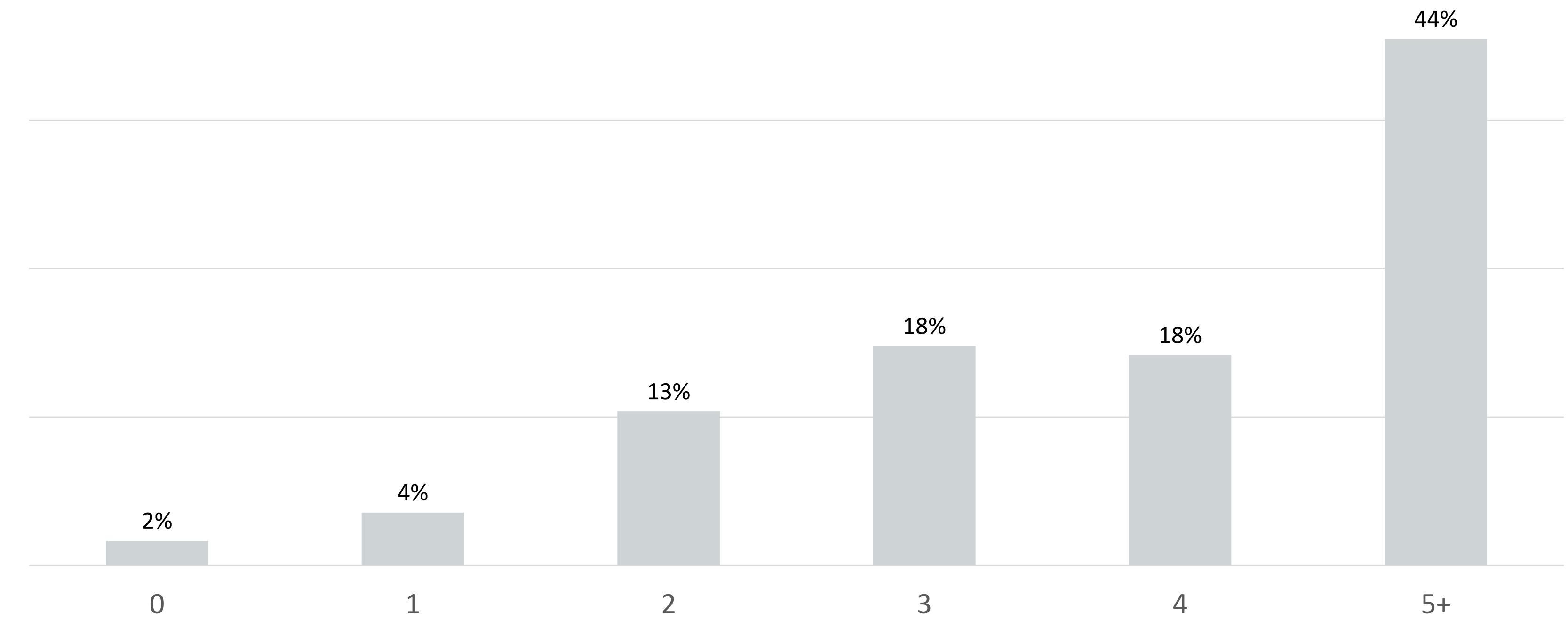
Insight:

The majority of respondents (42%) signed up for 5 or more races in the past year, with smaller portions registering for 3 (18%) or 4 (16%) races, indicating that many trail runners are highly active in race participation.

Survey question:

Q11 How many races do you plan to sign up for next year?

## Number of Races to Join Next Year



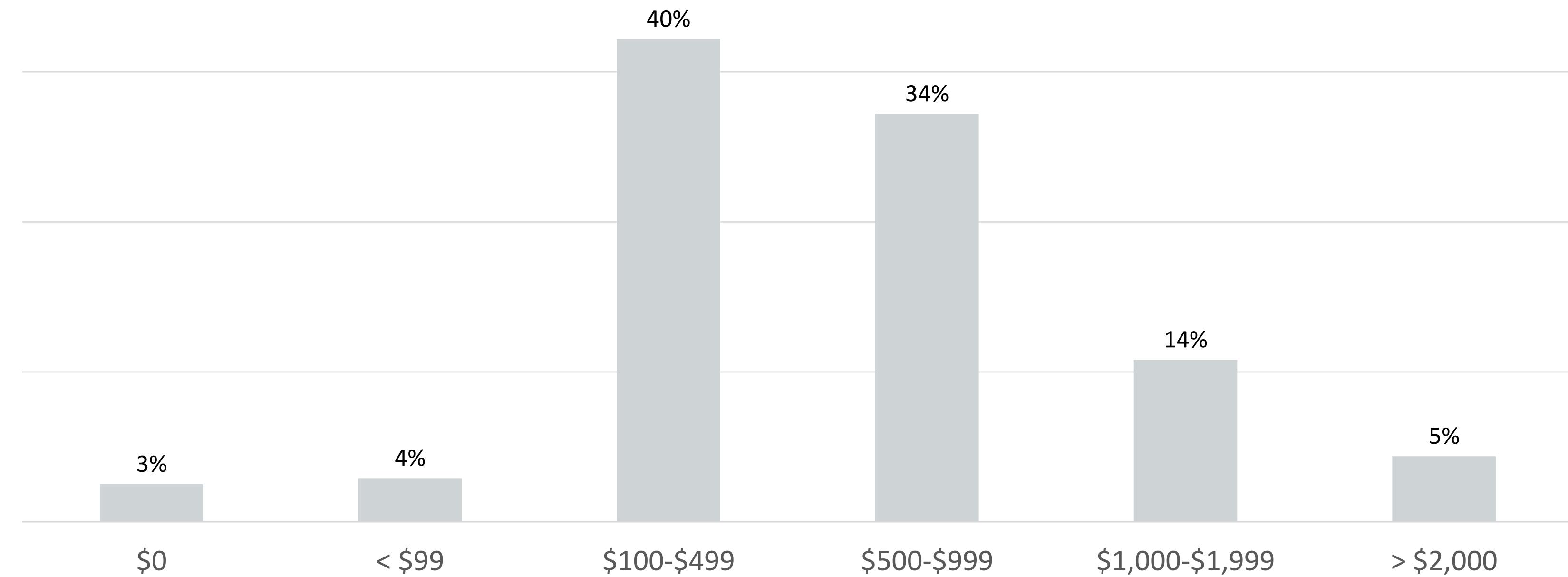
Insight:

A large portion of trail runners (44%) plan to sign up for 5 or more races in the next year, showing strong engagement in future race participation, with smaller but notable percentages planning for 3 (18%) or 4 (17%) races.

Survey question:

Q12 How much did you spend on race registrations in the last 12 months?

## Yearly Spend on Race Registrations



Insight:

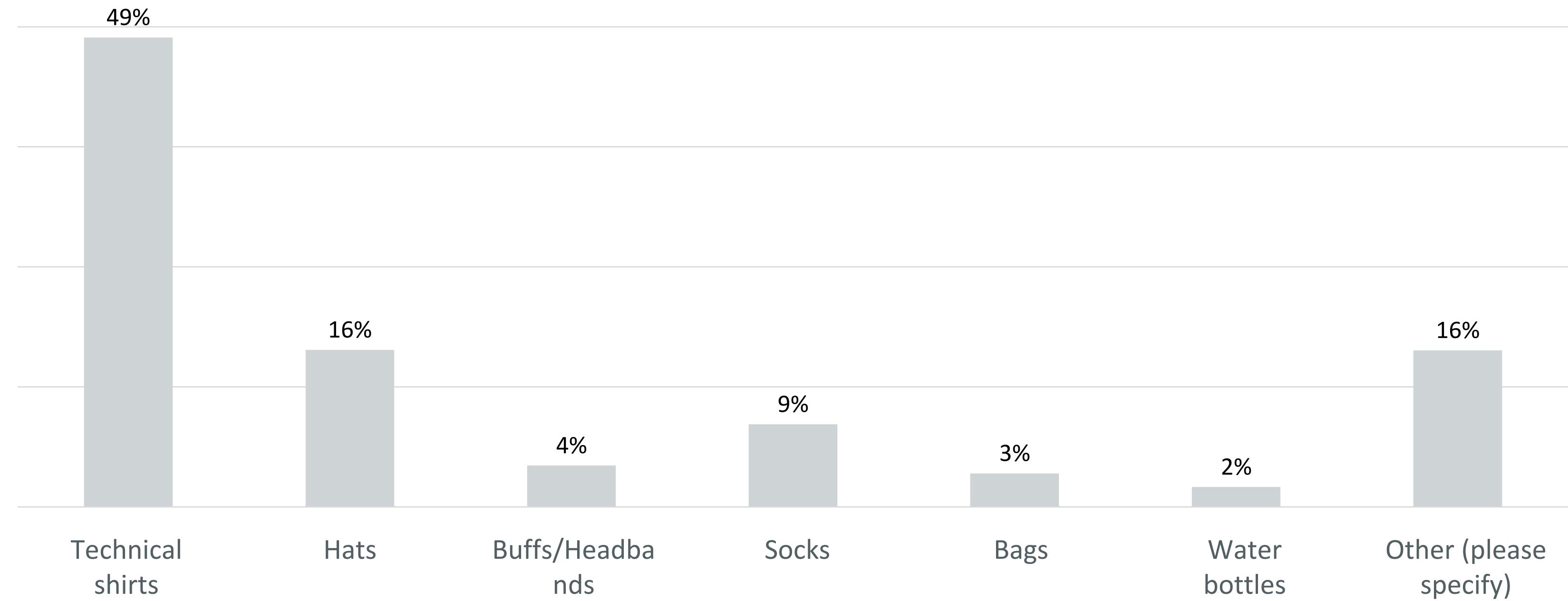
The majority of trail runners (40%) spent between \$100 and \$499 on race registrations in the past year, with 34% spending \$500 to \$999, indicating a significant investment in race participation for most respondents.

Survey question:

Q13

What type of race swag do you prefer to receive?

## Race Swag Preferences of Trail Runners



Insight:

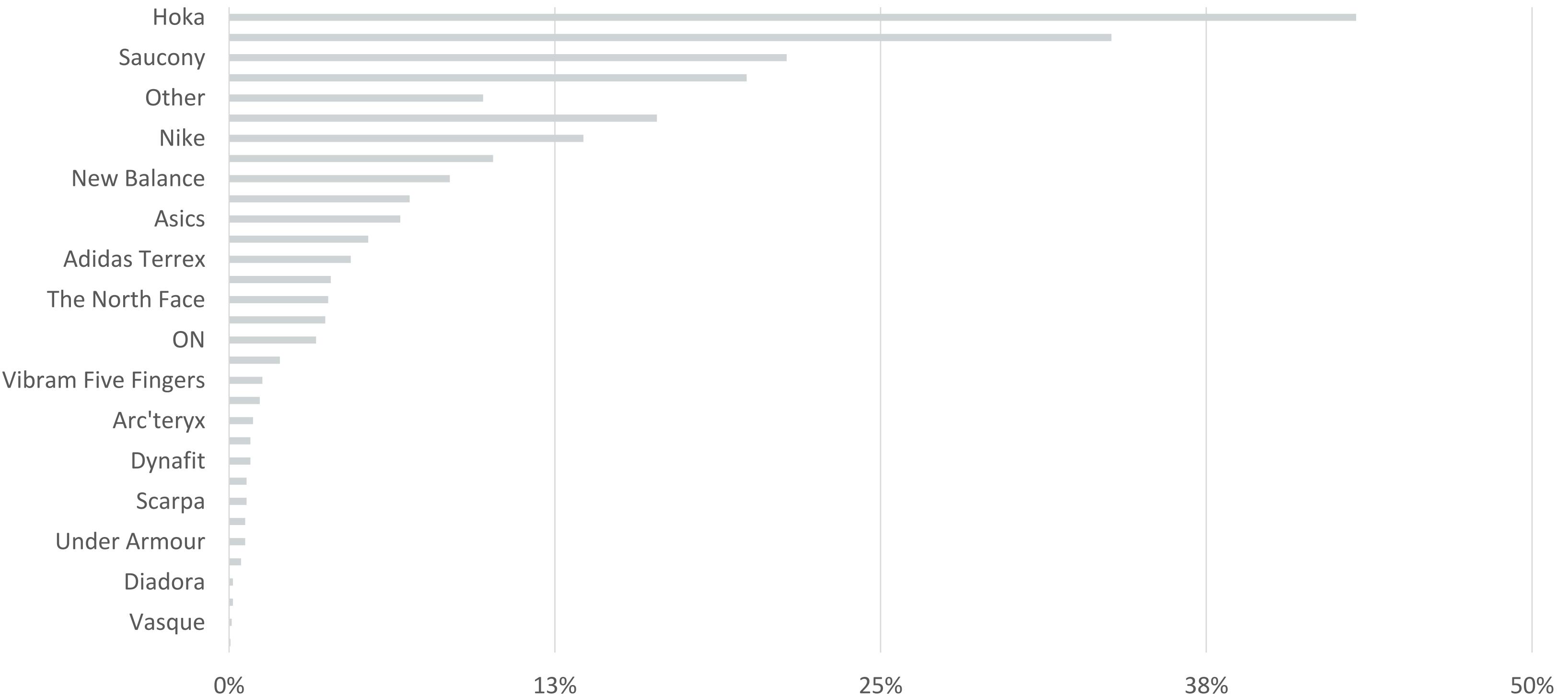
The majority of trail runners (48%) prefer to receive technical shirts as their race swag

Survey question:

Q14

Which brands of trail running shoes do you own?

## Popular Trail Running Shoe Brands



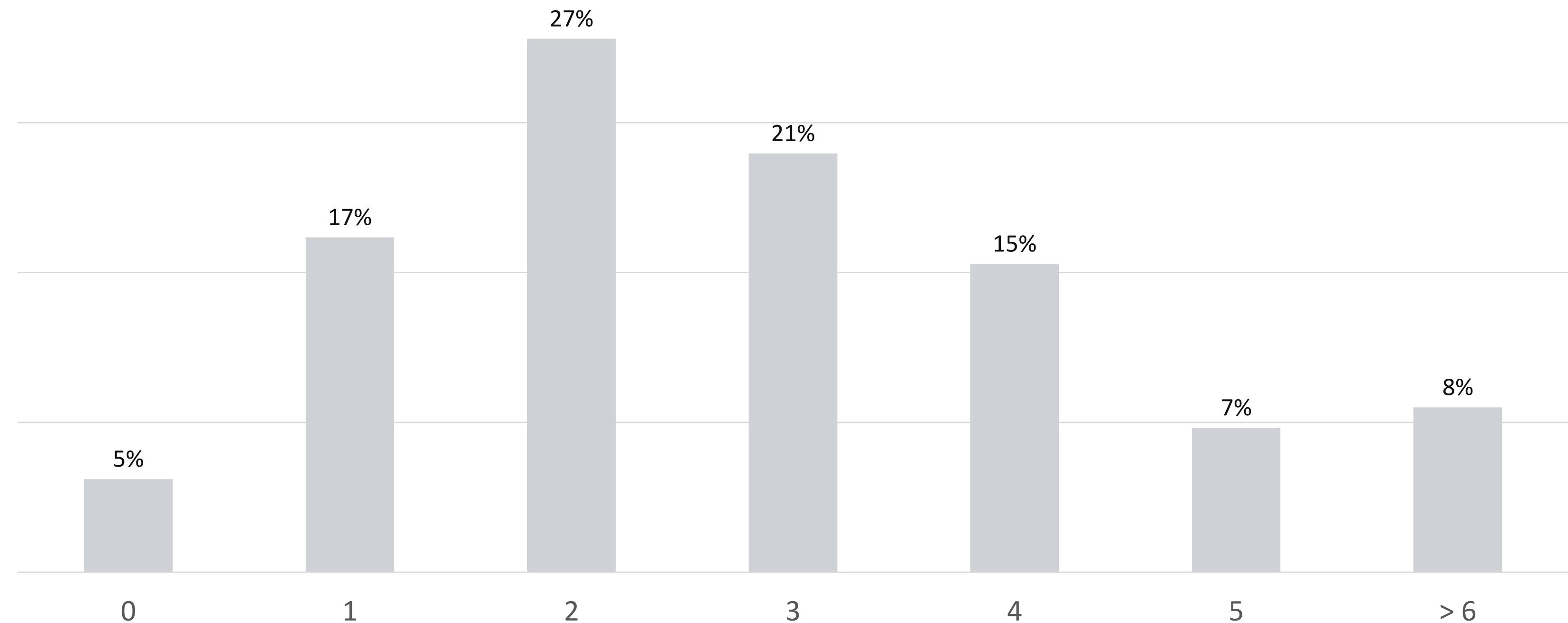
Insight:

Hoka is the most popular trail running shoe brand, owned by 43% of respondents, followed by Altra (33%) and Saucony (21%), with a wide range of other brands also represented.

## Number of Trail Running Shoes Purchased in the Last 12 Months

Survey question:

Q15 How many pairs of trail running shoes did you buy in the last 12 months?



Insight:

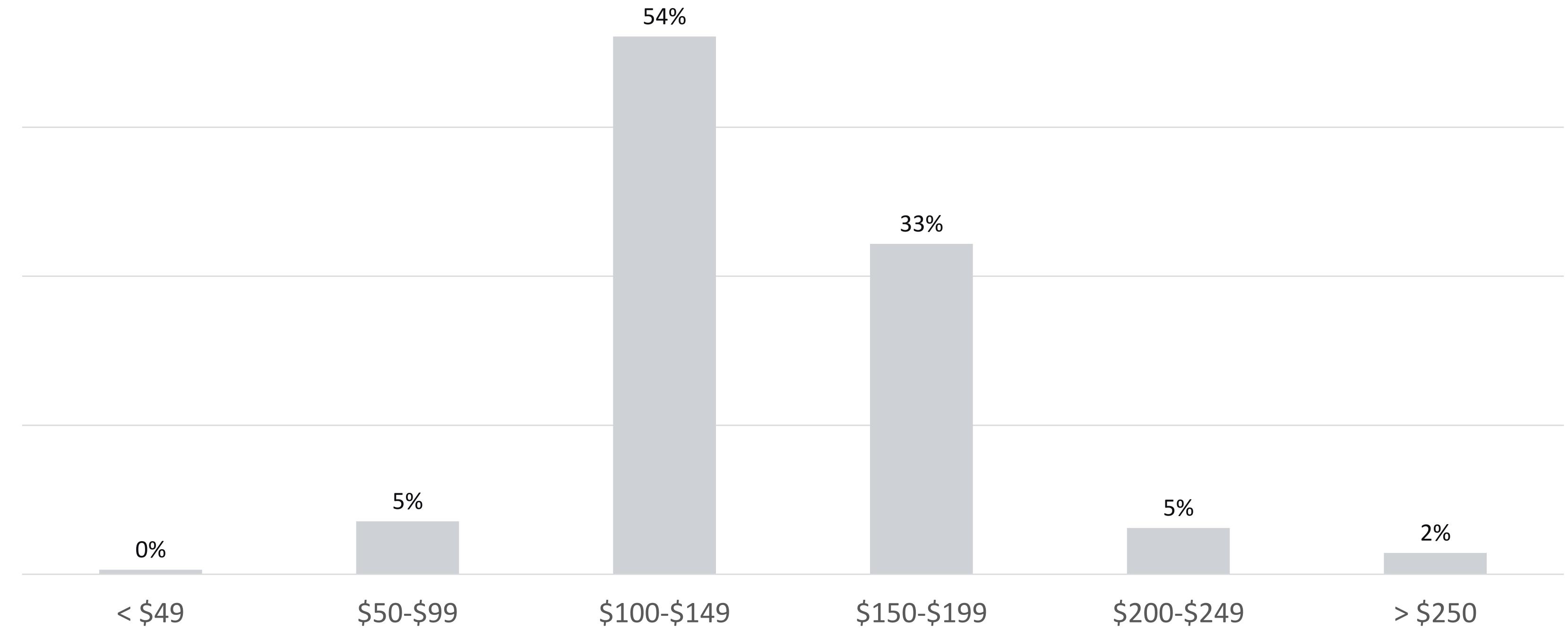
The majority of trail runners (26%) bought 2 pairs of trail running shoes in the past year

Survey question:

Q16

How much are you willing to spend on a trail running shoe?

## Willingness to Spend on Trail Running Shoes



Insight:

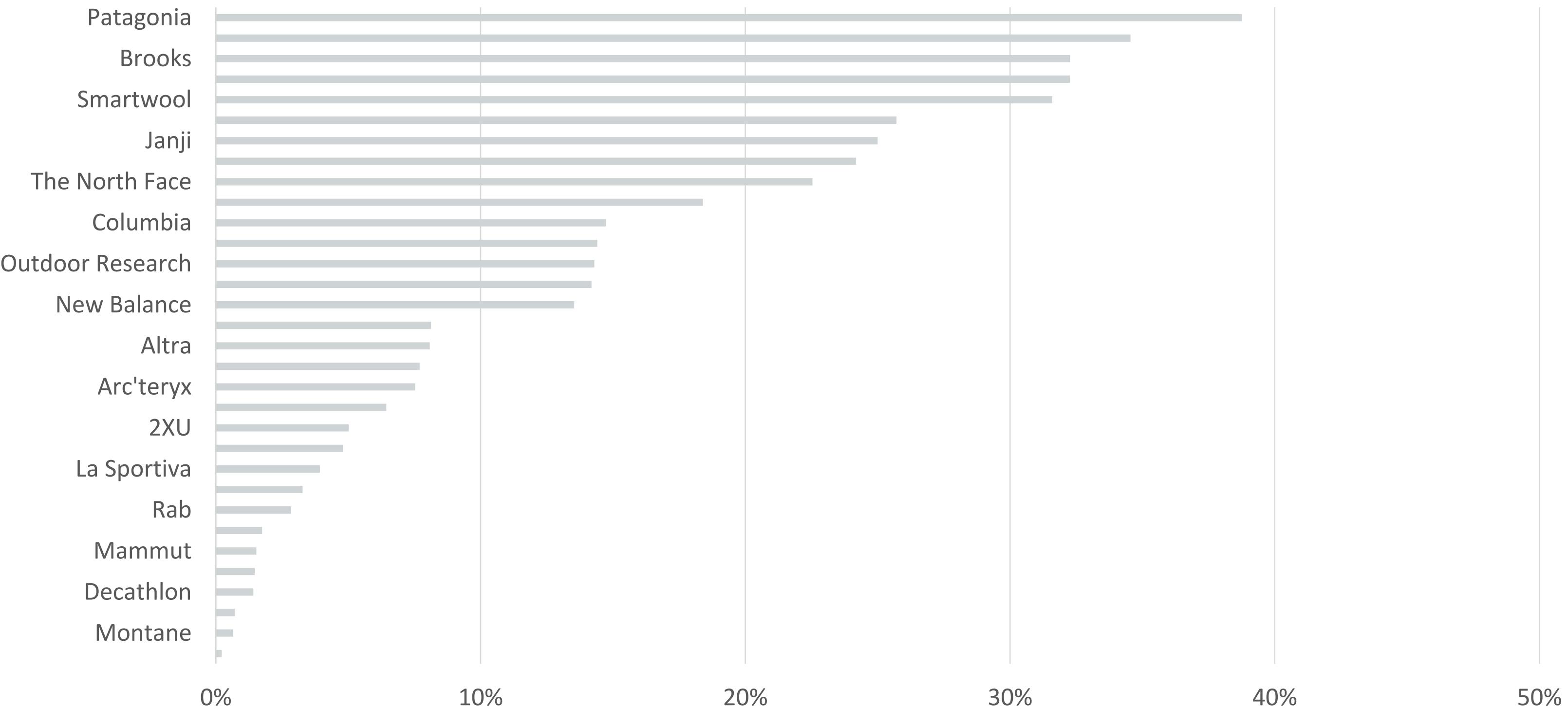
Most trail runners (54%) are willing to spend between \$100 and \$149 on a pair of trail running shoes, with 33% willing to spend \$150 to \$199.

Survey question:

Q17

Which brands of trail running apparel do you own?

## Popular Trail Running Apparel Brands by Ownership



Insight:

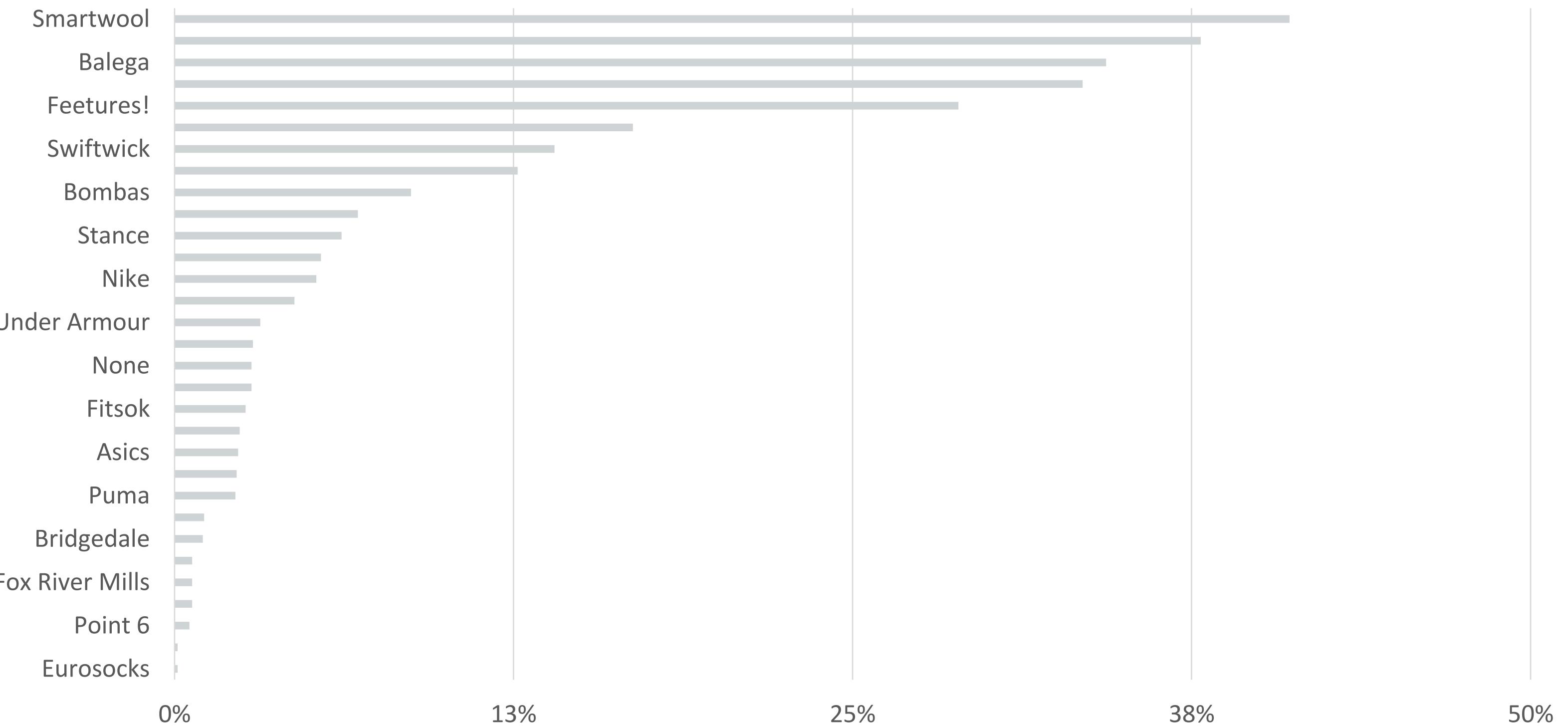
Patagonia is the most popular trail running apparel brand (38%), followed by Nike (35%) and Brooks (32%), with a wide variety of other brands also owned by trail runners.

Survey question:

Q18

Which brands  
of running socks do  
you own?

Brands of socks owned



Insight:

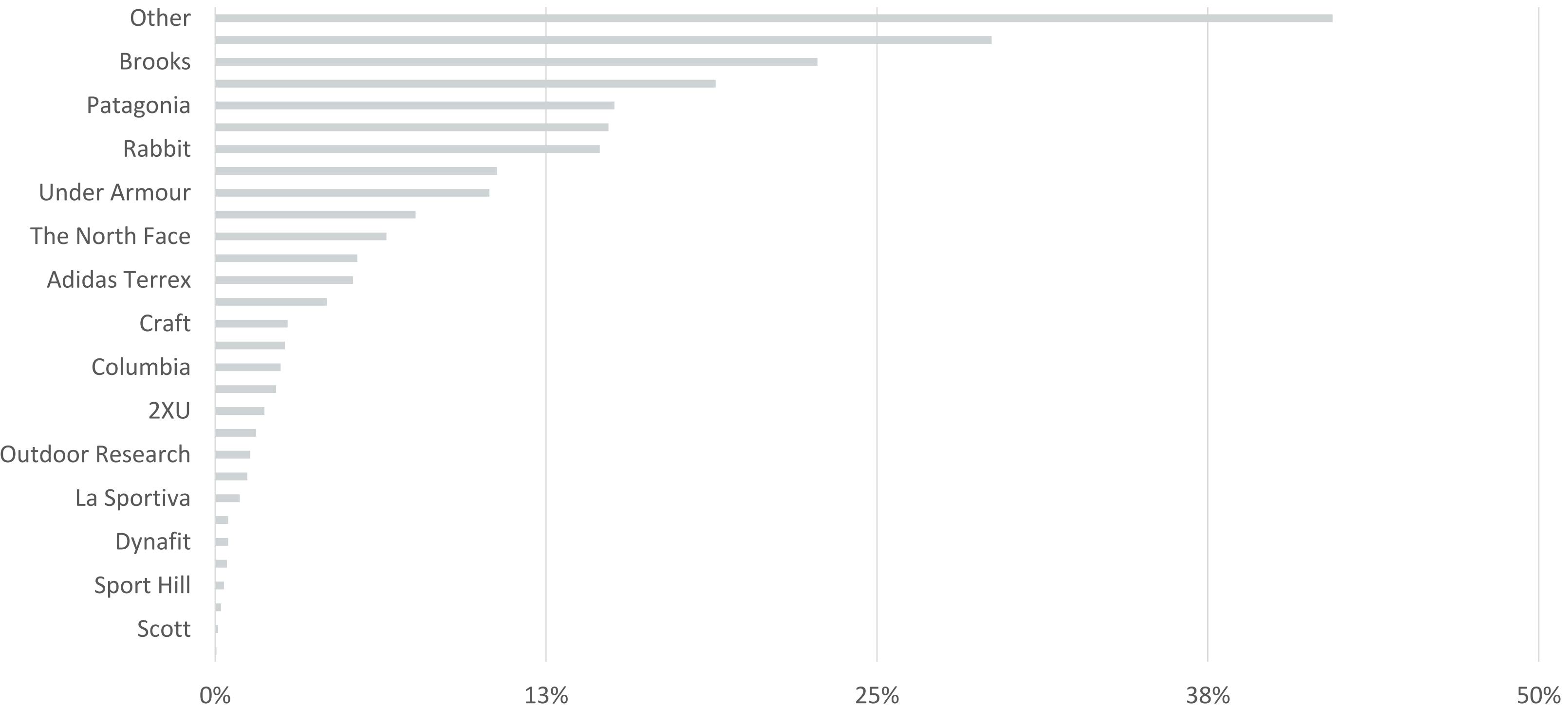
The trail running sock market is largely led by 5 market leaders before a sharp drop off in popularity

Survey question:

Q19

Which brands of trail running shorts do you own?

## Trail Running Shorts Brands



Insight:

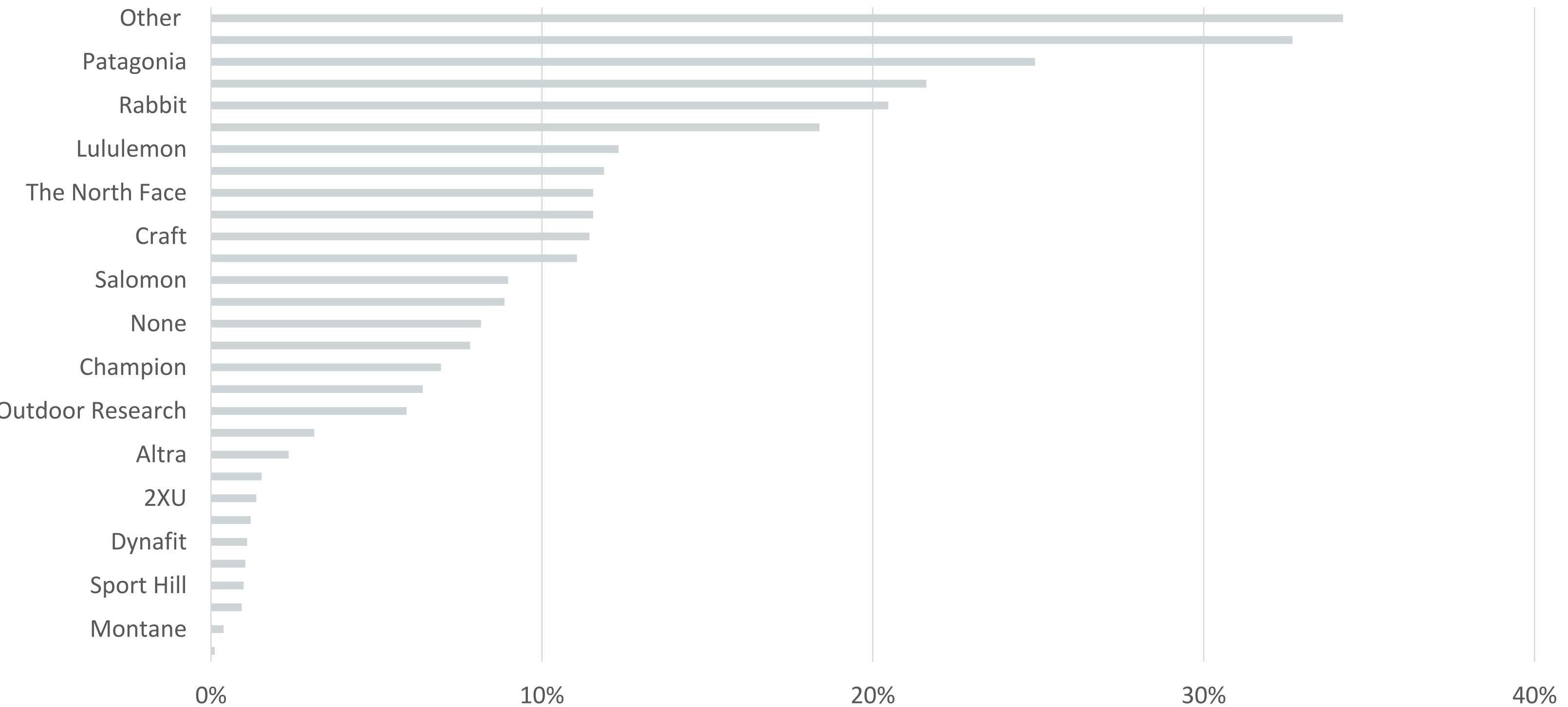
No one owns the trail running short market. Nike has the most presence among trail runners with 29% of runners owning Nike shorts

Survey question:

Q20

Which brands of running shirts do you own?

## Running Shirt Brands



Insight:

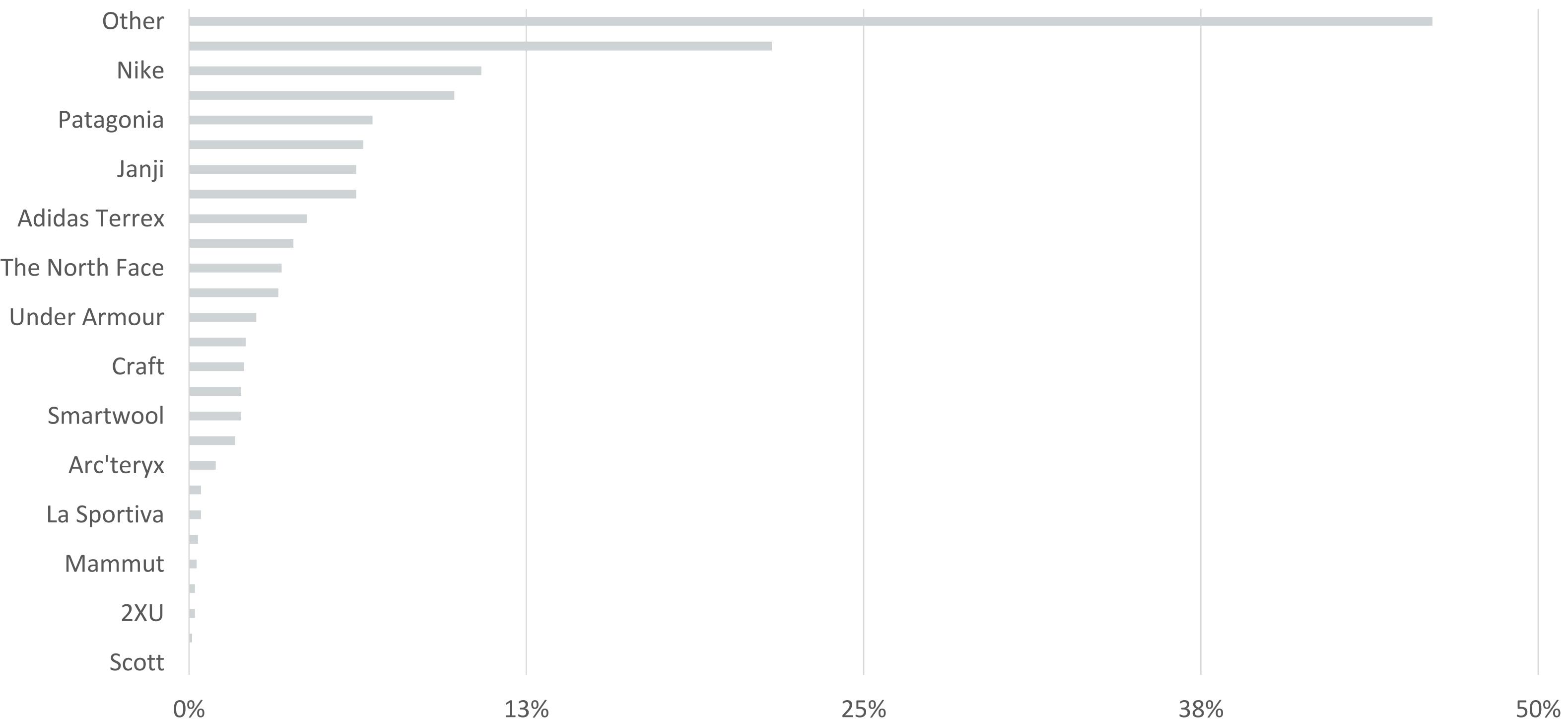
The market is largely fragmented. Nike is the most popular brand of running shirts (32%) among trail runners, followed by Patagonia (24%)

Survey question:

Q21

Which brands of hats do you trail run in?

## Trail Running Hat Brands



Insight:

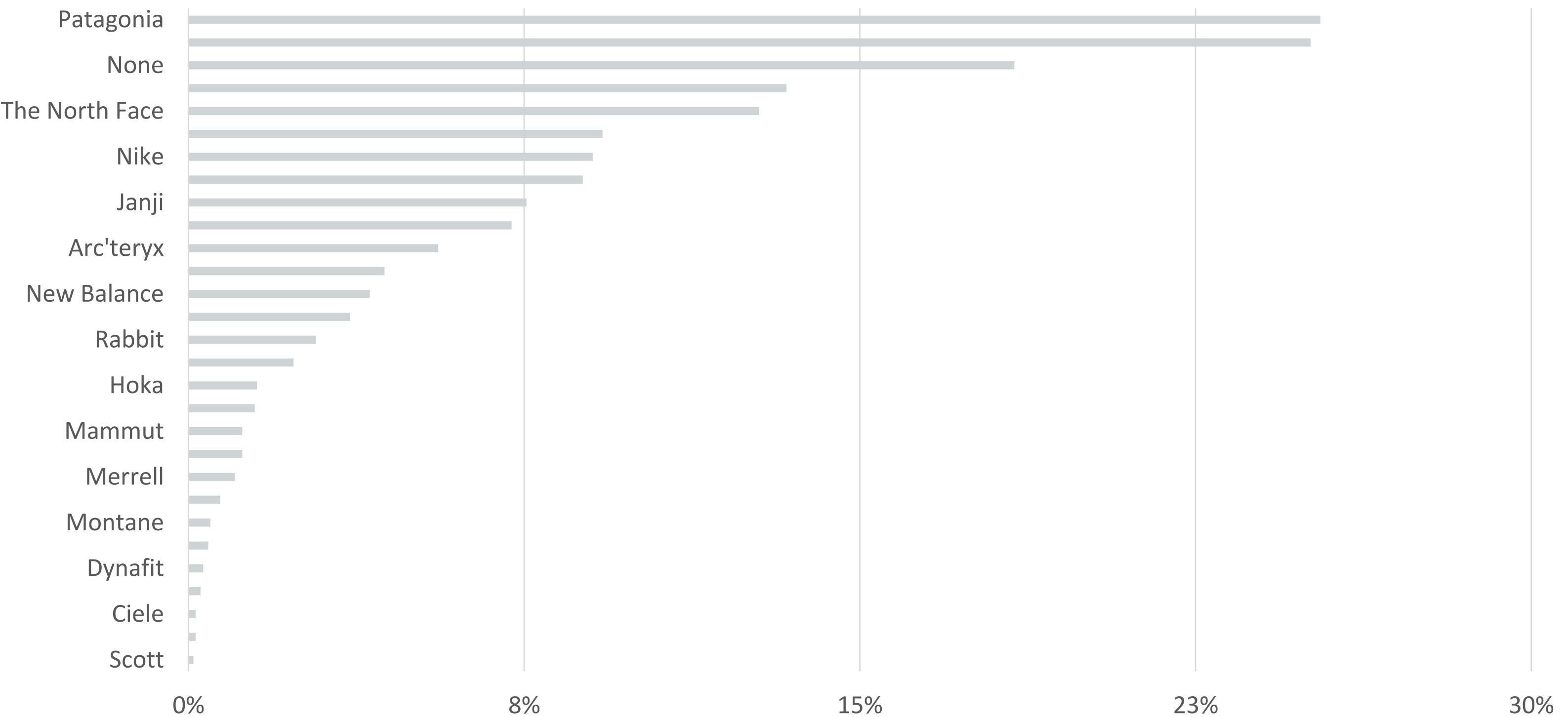
The majority of trail runners (46%) wear hats from other brands not listed and 21% do not use a hat at all. Nike (11%) and Ciele (10%) are the most popular brands listed.

Survey question:

Q22

Which brands of jackets do you trail run in?

## Trail Running Jacket Brands



Insight:

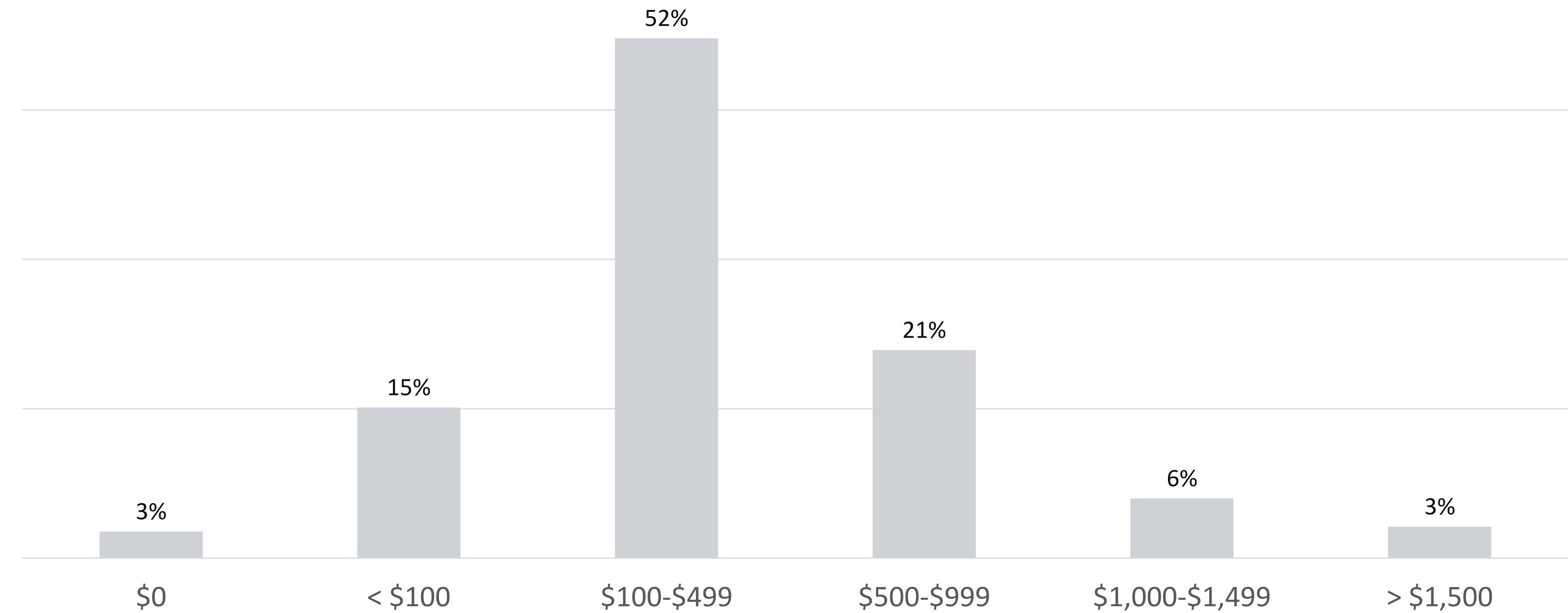
Patagonia (25%) is the leading brand in the trail running jacket space

## Spending on Trail Running Clothing/Apparel in the Last 12 Months

Survey question:

Q23

How much did you spend in the last 12 months on trail running clothing/apparel (e.g., jackets, hats, socks)?



Insight:

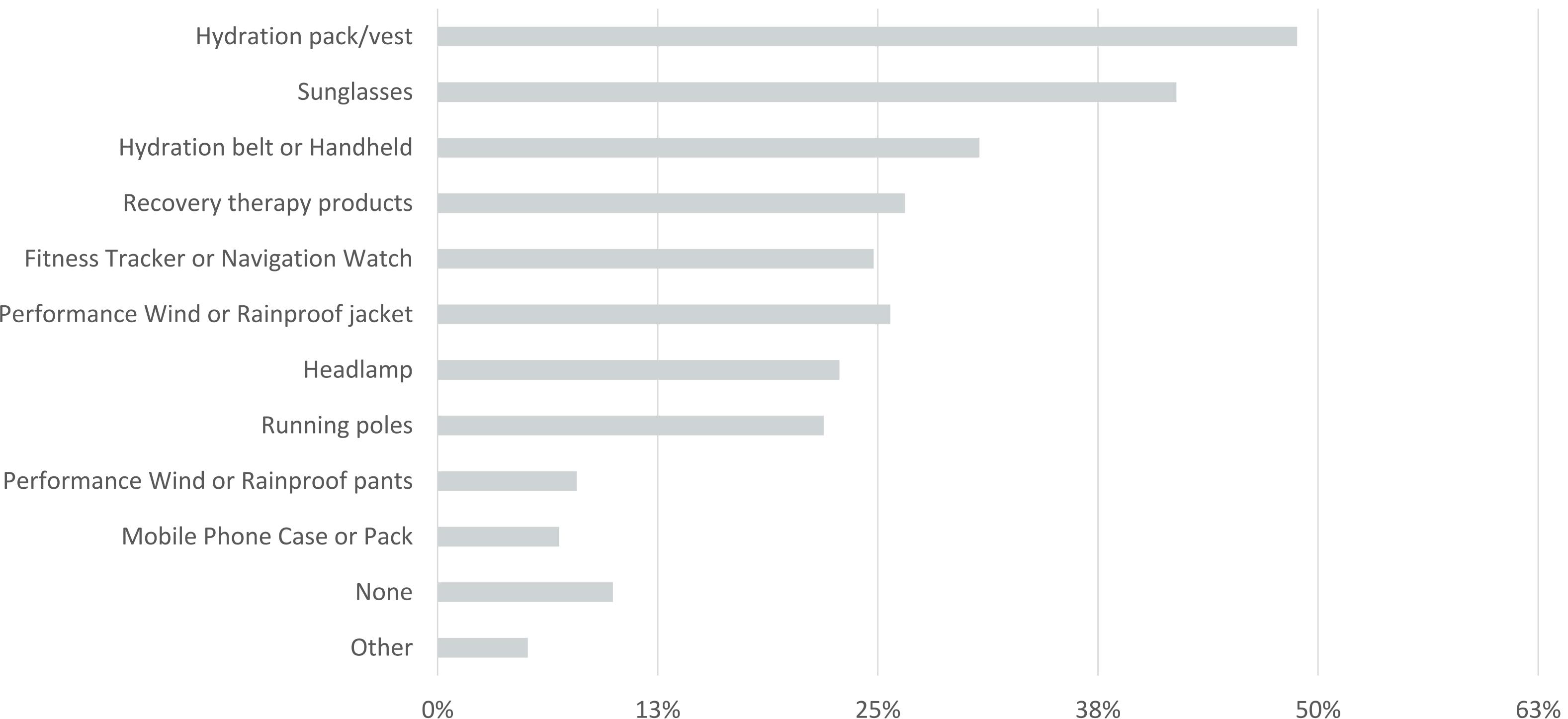
Over half of trail runners (52%) spent between \$100 and \$499 on clothing and apparel in the past year, with 21% spending between \$500 and \$999.

Survey question:

Q24

What running gear have you purchased in the last 12 months?

## Trail Runners' Running Gear



Insight:

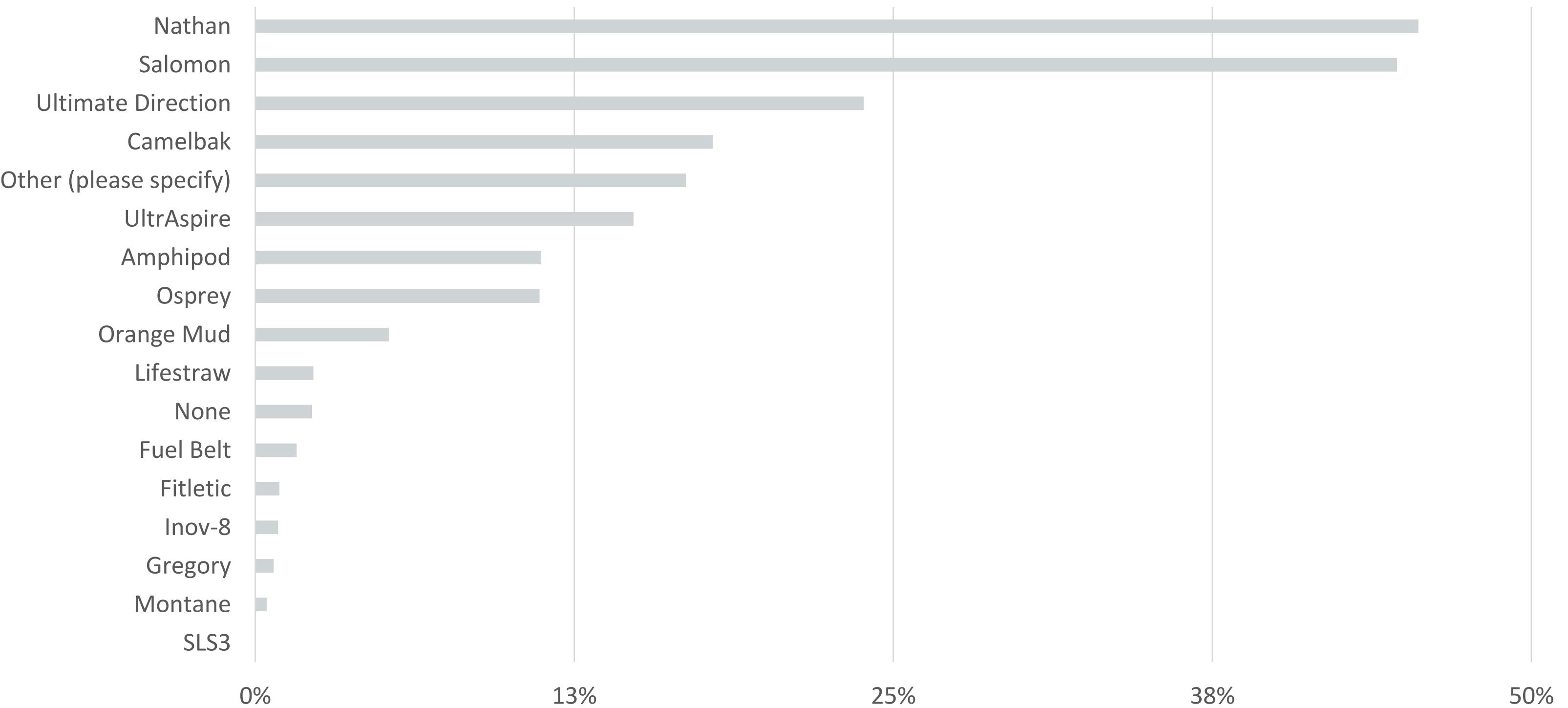
The most commonly purchased gear among trail runners in the past year was hydration packs/vests (50%), sunglasses (42%), and hydration belts or handhelds (31%).

## Popular Brands of Hydration Packs, Belts, and Hand-Helds

Survey question:

Q25

Which brands of hydration packs, belts, and/or hand-helds do you own?



Insight:

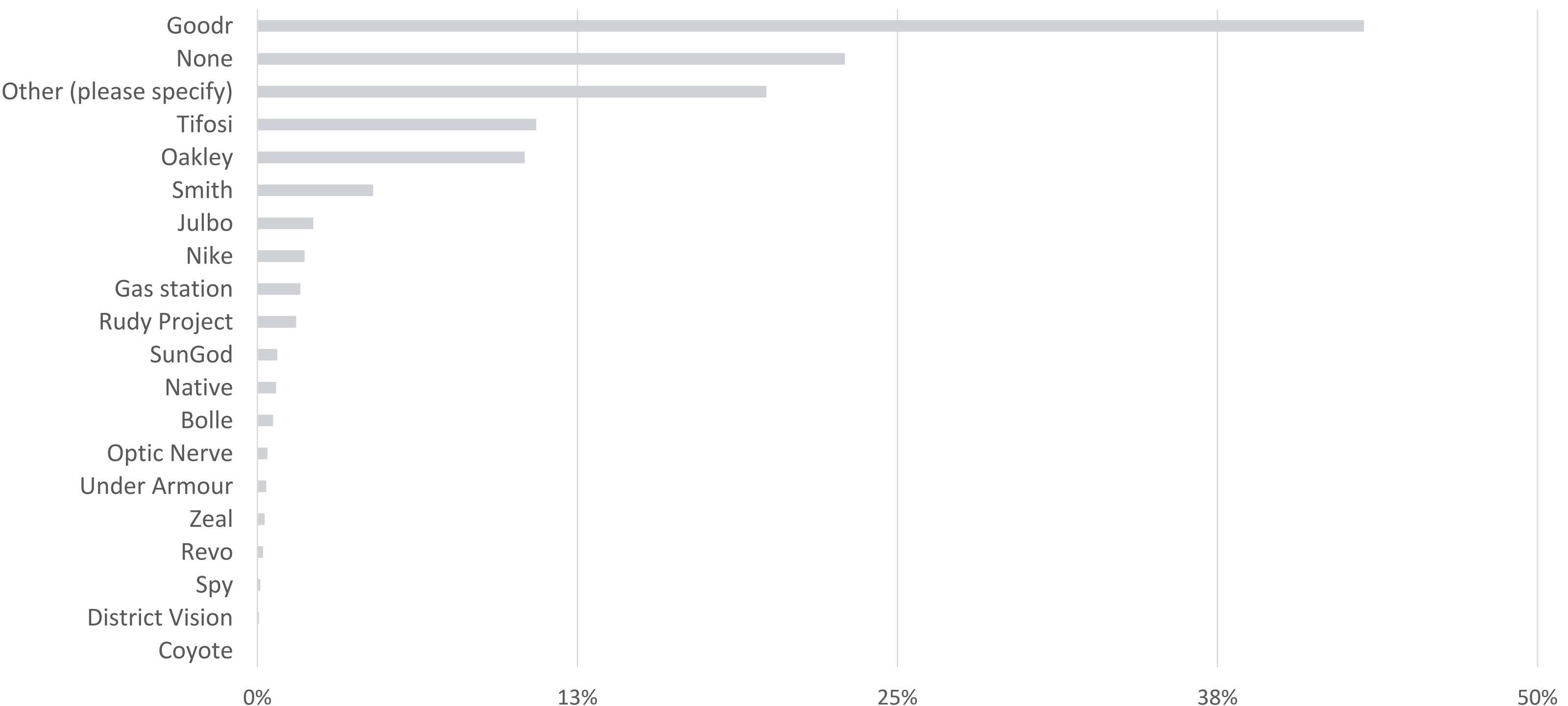
Nathan (46%) and Salomon (45%) are by far the most popular brands of hydration packs, belts, and hand-helds among trail runners

Survey question:

Q26

Which brands  
of sunglasses do you  
trail run in?

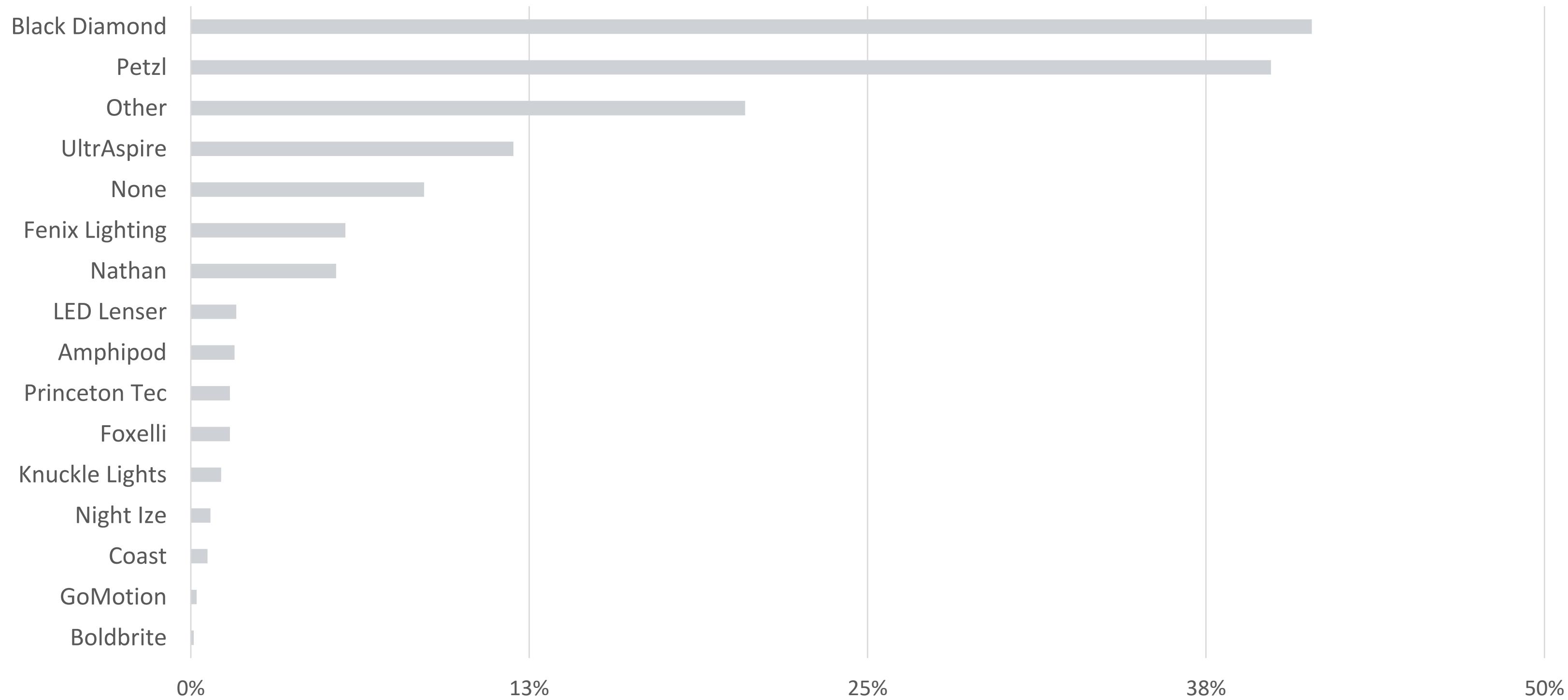
## Trail Running Sunglasses Brands



Insight:

Goodr is the most popular sunglasses brand among trail runners (43%), with 23% of respondents not using sunglasses at all

## Popular Headlamp Brands Among Trail Runners



Survey question:

Q27

Which brands of headlamps/lighting do you own?

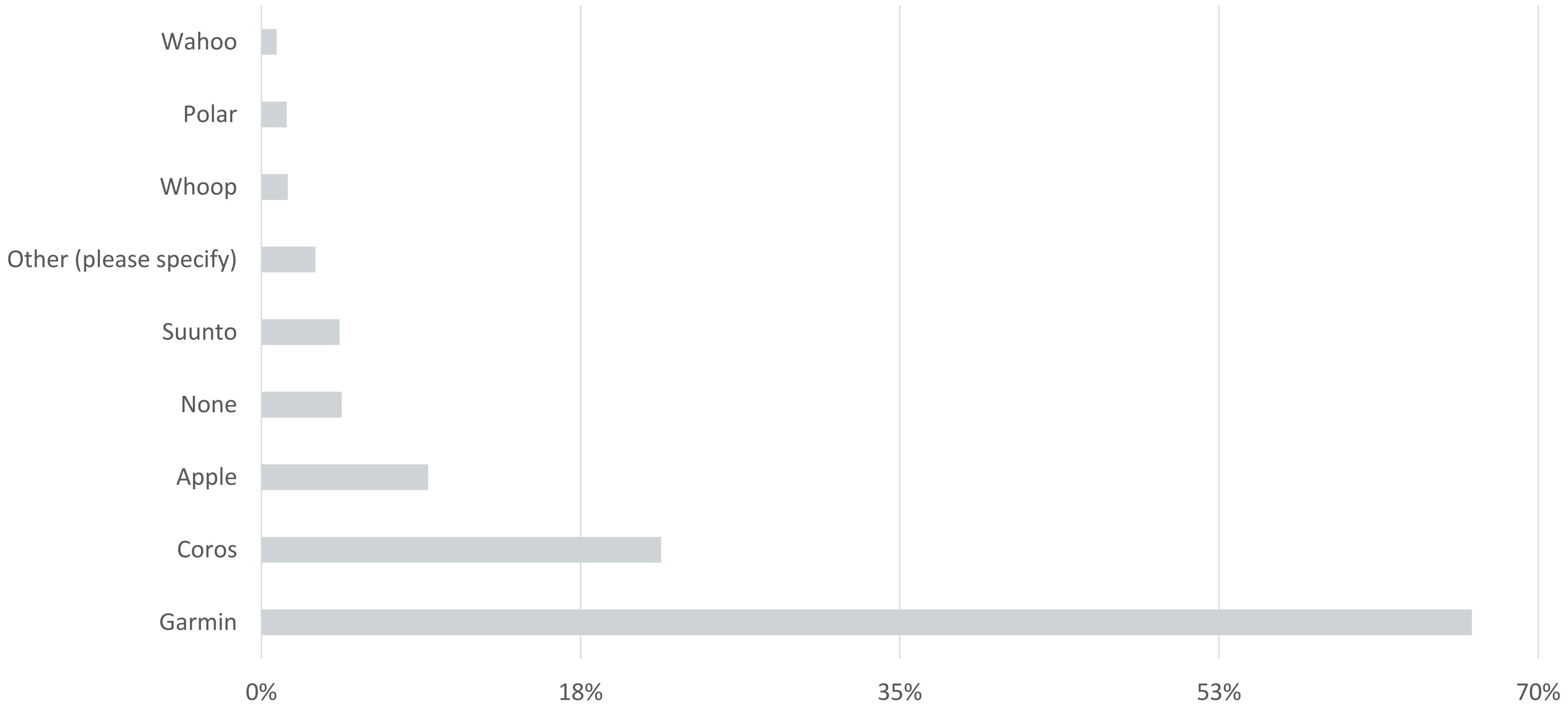
Insight:

Black Diamond (41%) and Petzl (40%) are the most popular headlamp brands among trail runners

## Popular Fitness Tracker and Navigation Watch Brands Among Trail Runners

Survey question:

**Q28** Which brands of fitness trackers / navigation watches do you own?



Insight:

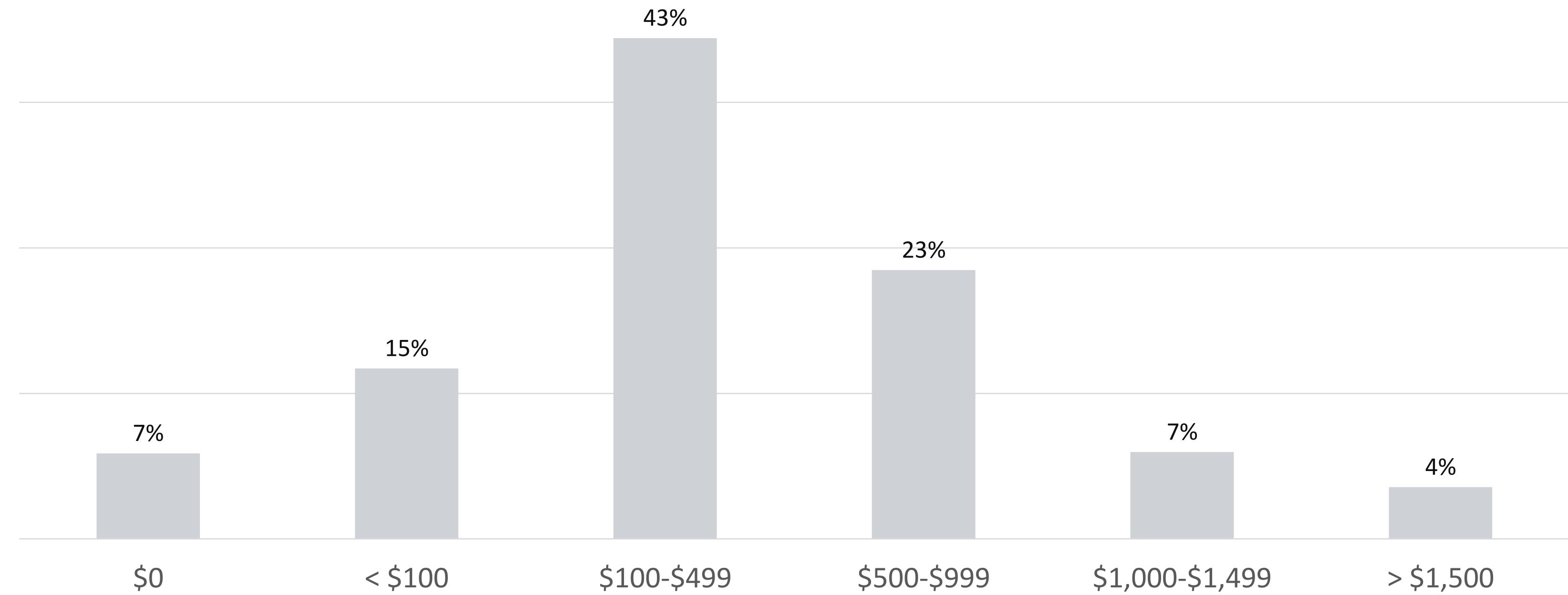
Garmin dominates the market for fitness trackers and navigation watches among trail runners, with 66% of respondents owning one, followed by Coros (22%) and Apple (9%).

## Spending on Running-Related Gear in the Last 12 Months

Survey question:

Q29

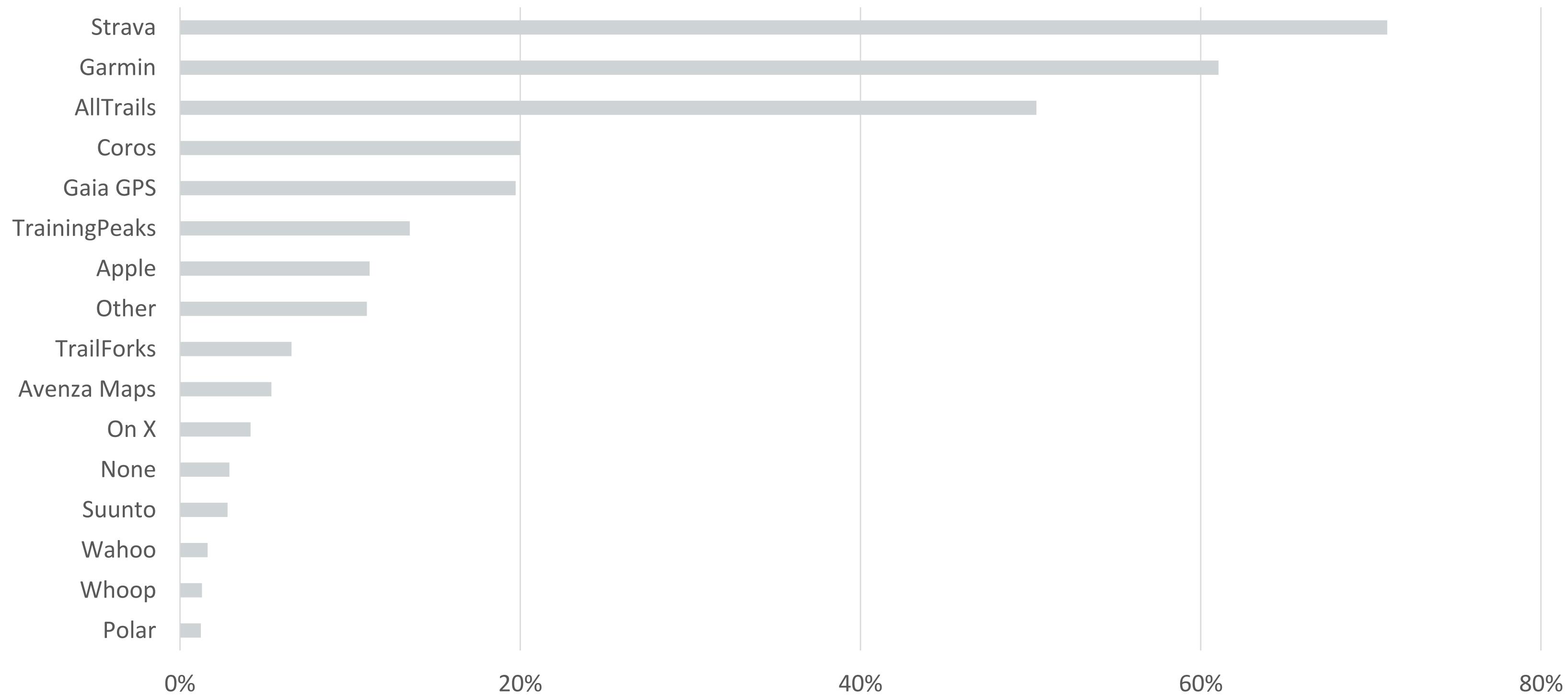
How much did you spend in the last 12 months on running-related gear (i.e., gear listed above)?



Insight:

Most trail runners (43%) spent between \$100 and \$499 on running-related gear in the past year, while 23% spent between \$500 and \$999.

## Top Tech Platforms Used by Trail Runners



Survey question:

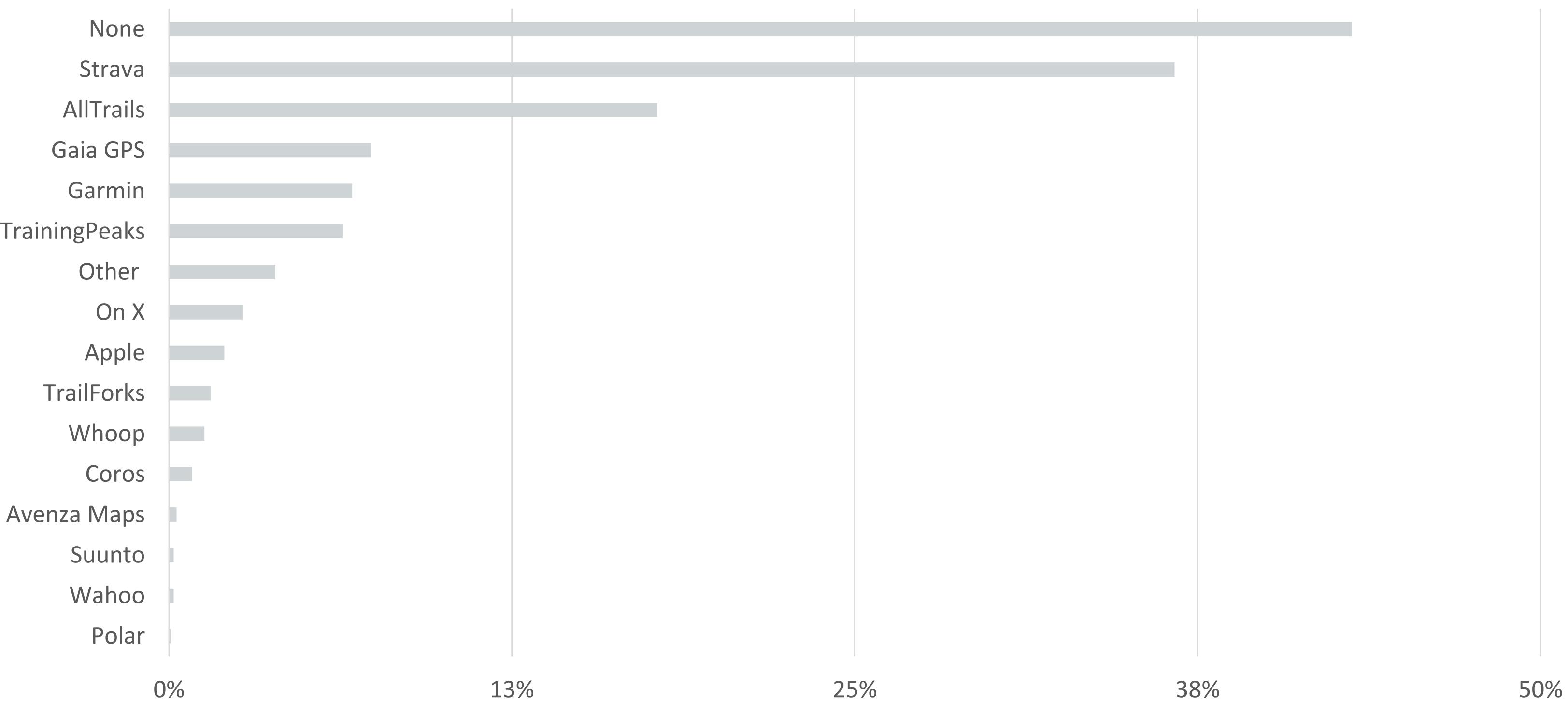
Q30

Which of the following tech platforms do you use?

Insight:

Strava is the most widely used tech platform among trail runners (71%), followed by Garmin (61%) and AllTrails (50%).

## Paid Subscriptions for Tech Platforms Among Trail Runners



Survey question:

Q31

Which of the following tech platforms do you pay a subscription to use?

Insight:

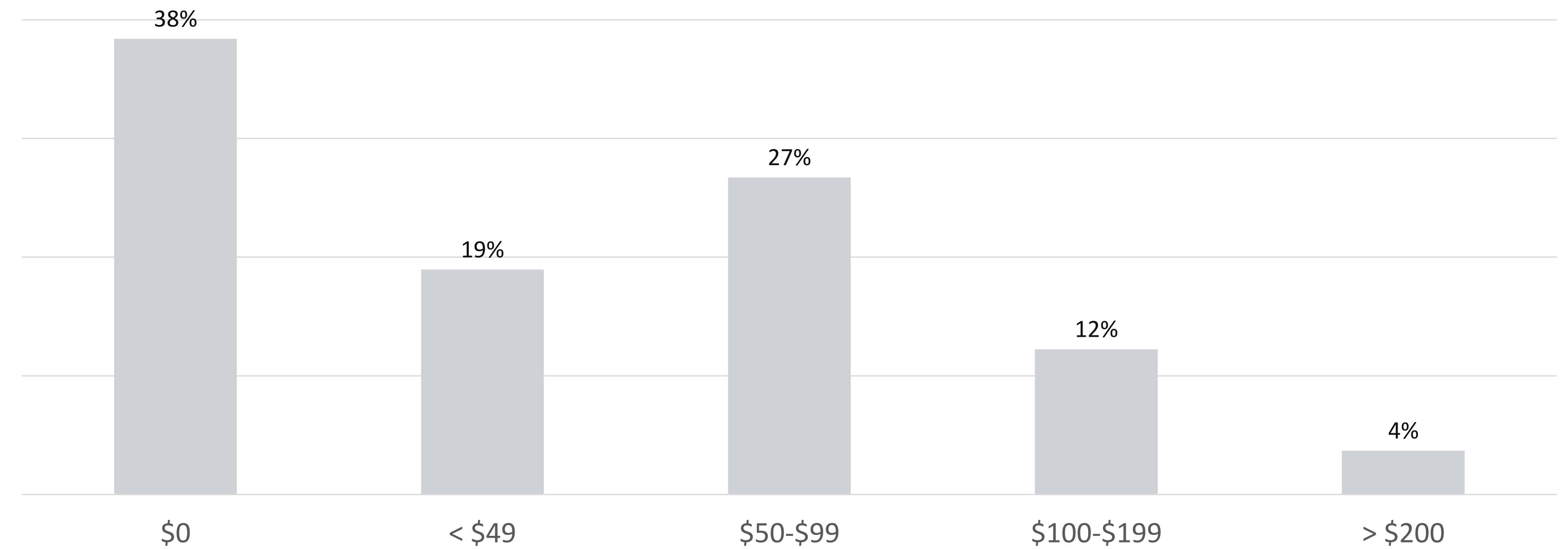
Nearly half of trail runners (43%) do not pay for tech platform subscriptions, but Strava is the most popular paid service (37%), followed by AllTrails (18%).

Survey question:

Q32

How much do you spend per year on subscriptions?

## Annual Spending on Subscriptions by Trail Runners



Insight:

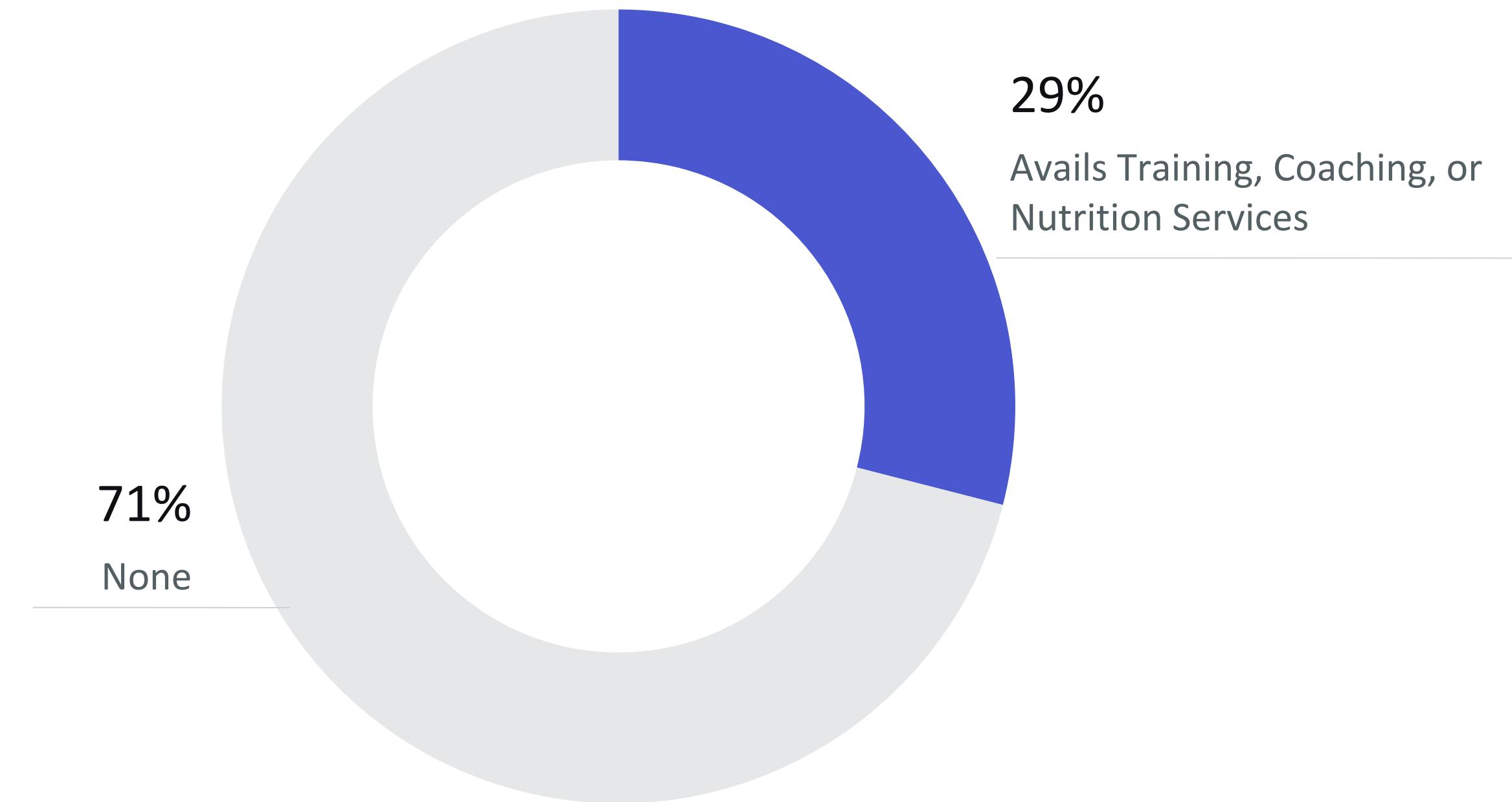
The majority of trail runners (38%) do not spend money on subscriptions, while 27% spend between \$50 and \$99 annually.

Survey question:

Q33

Do you use any training, coaching, or nutrition services?

## Usage of Training, Coaching, or Nutrition Services Among Trail Runners



Insight:

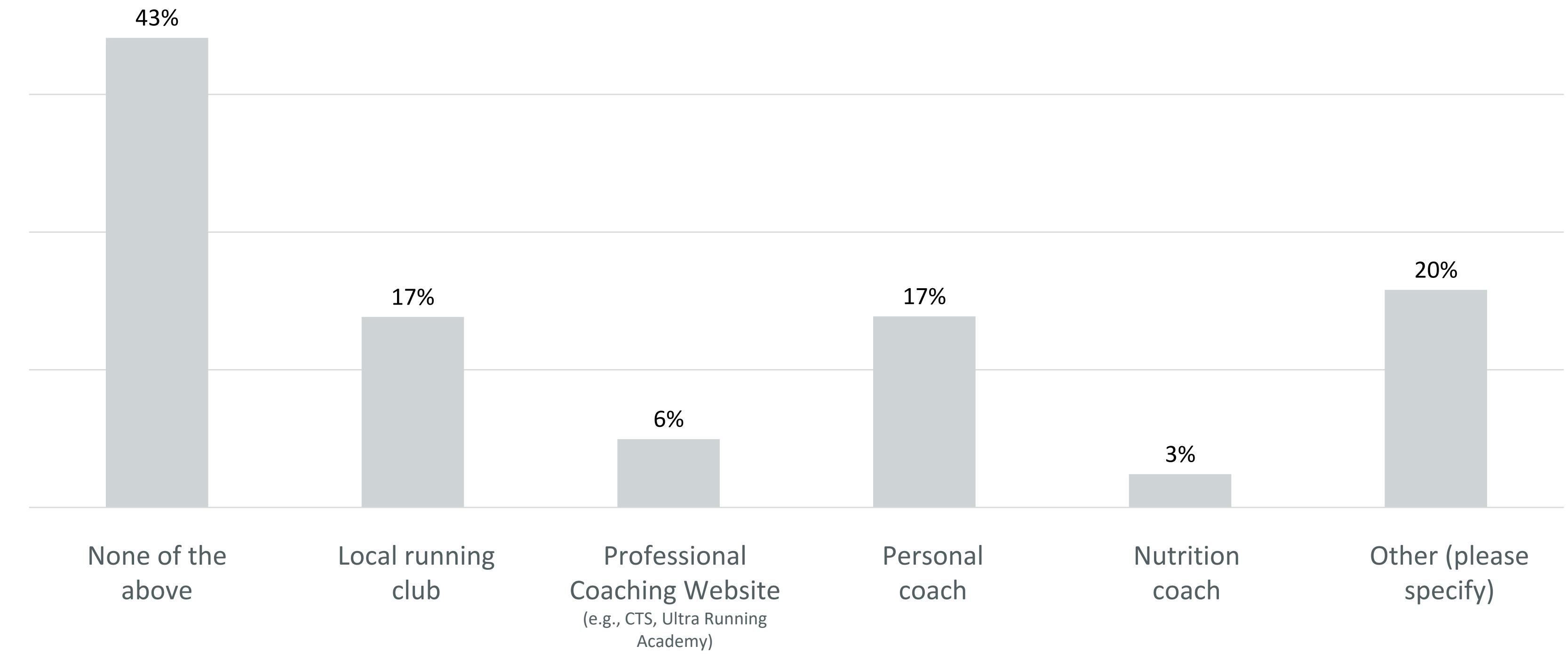
Most trail runners (71%) do not use training, coaching, or nutrition services, while 29% do take advantage of these services.

## Platforms Used for Training, Coaching, or Nutrition Services

Survey question:

Q34

What platform do you use for your service?



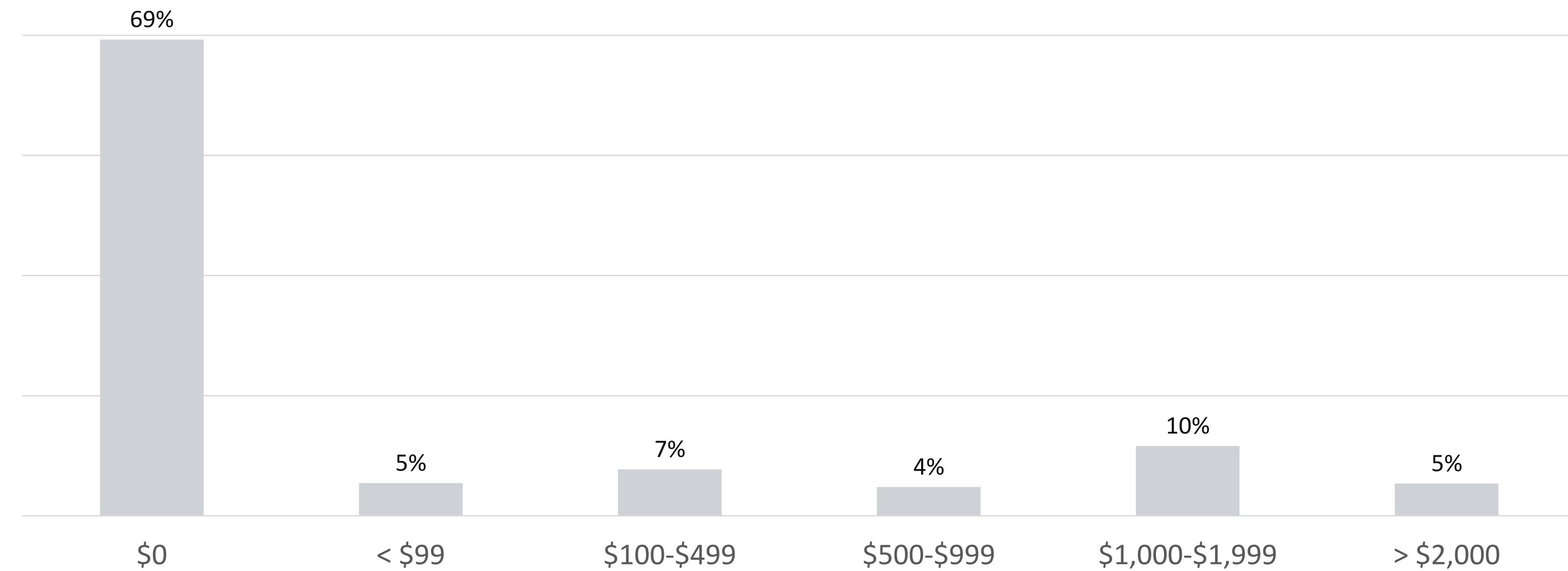
Insight:

Personal coaches (17%) and local running clubs (17%) are the most popular options for training and coaching services

## Annual Spending on Training/Coaching Services by Trail Runners

Survey question:

Q35 How much do you spend per year on training/coaching services?



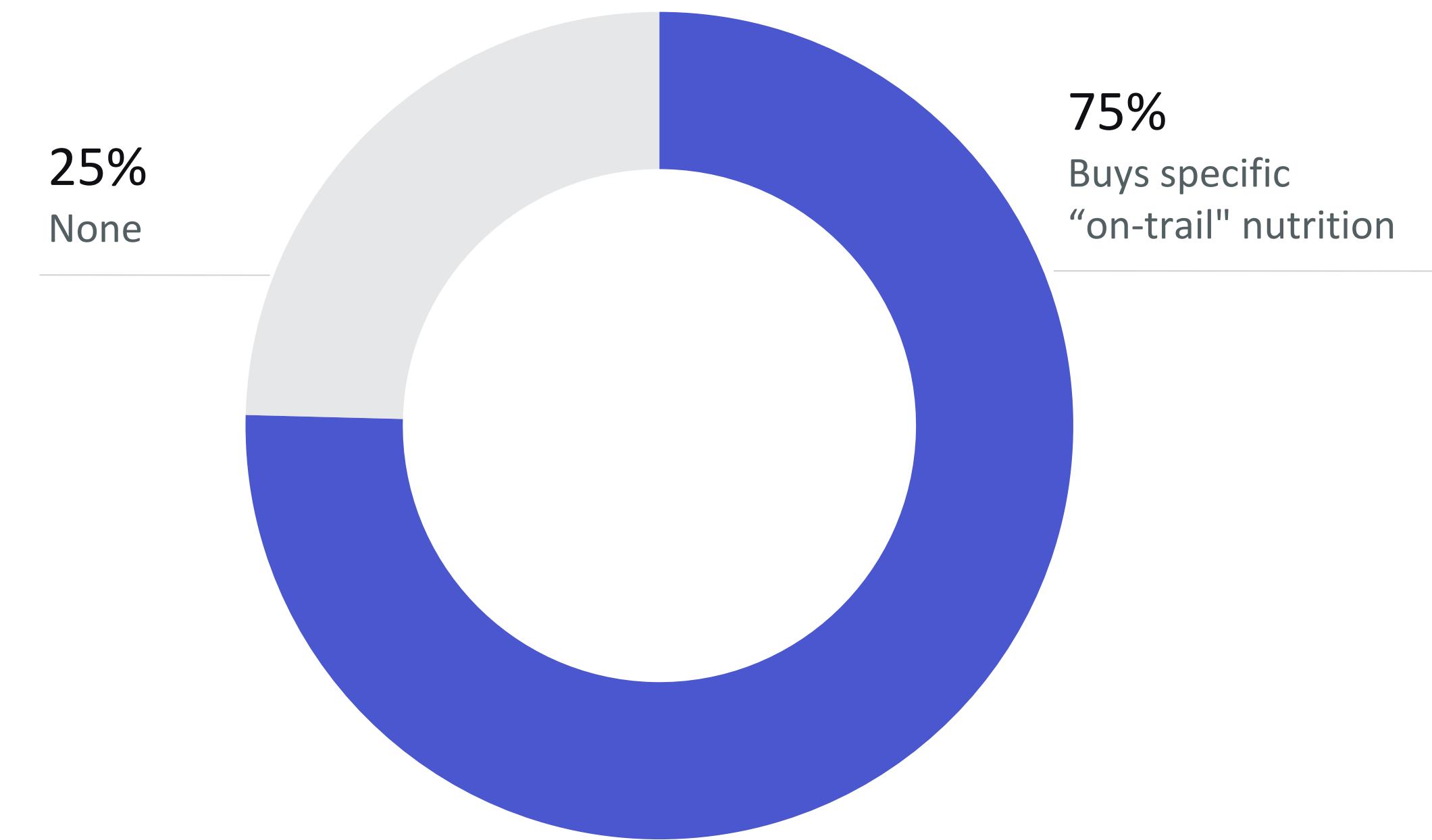
Insight:

The majority of trail runners (69%) do not spend on training or coaching services, while 10% spend between \$1,000 and \$1,999 annually.

Survey question:

Q36 Do you buy specific  
"on-trail" nutrition?

## Trail Runners' "On-Trail" Nutrition Purchases



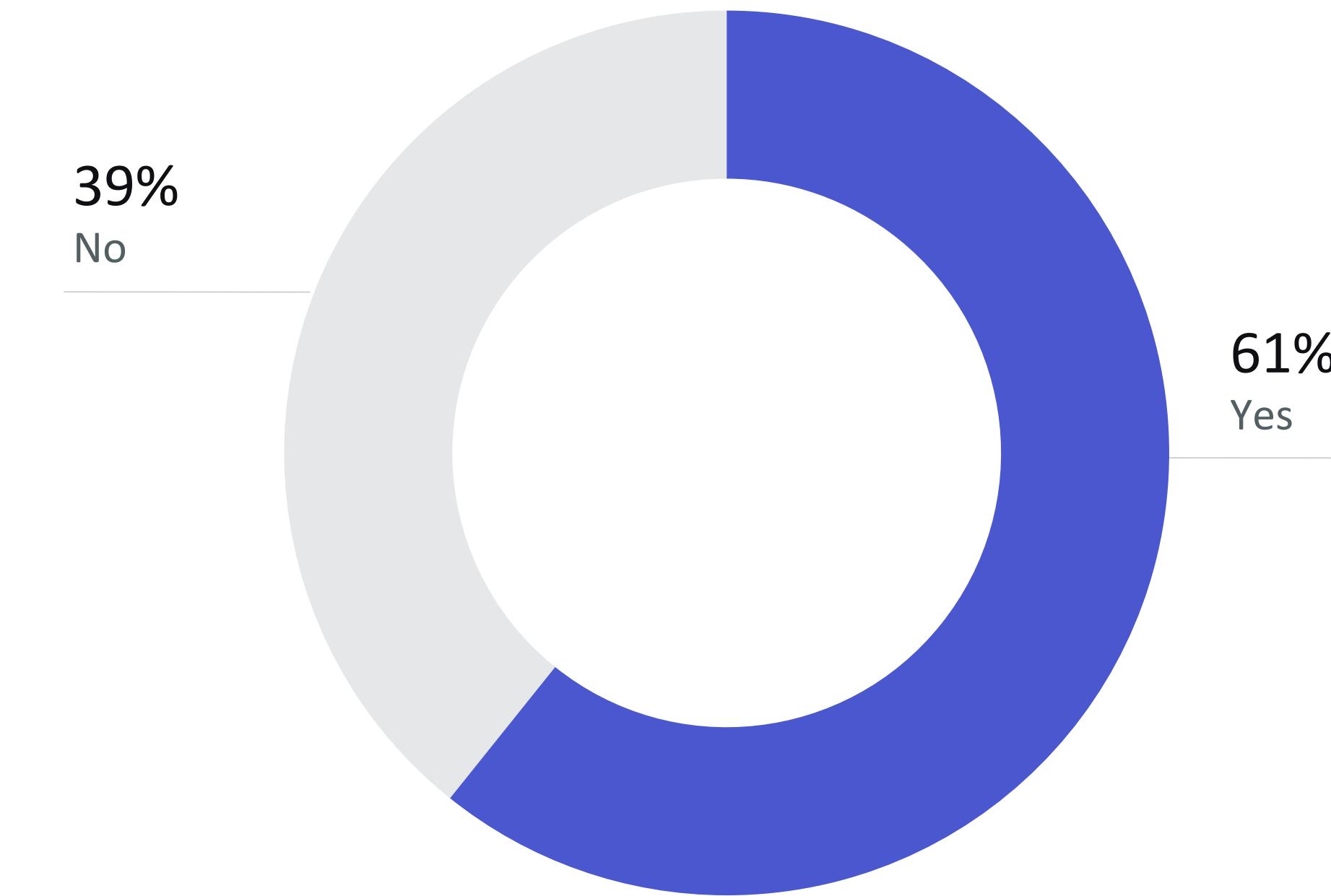
Insight:

A significant majority of trail runners (75%) buy specific "on-trail" nutrition products, while 25% do not.

Survey question:

Q37 Do you buy pre- or post-run supplements to help with performance and recovery?

## Purchase of Pre- or Post-Run Supplements for Performance and Recovery



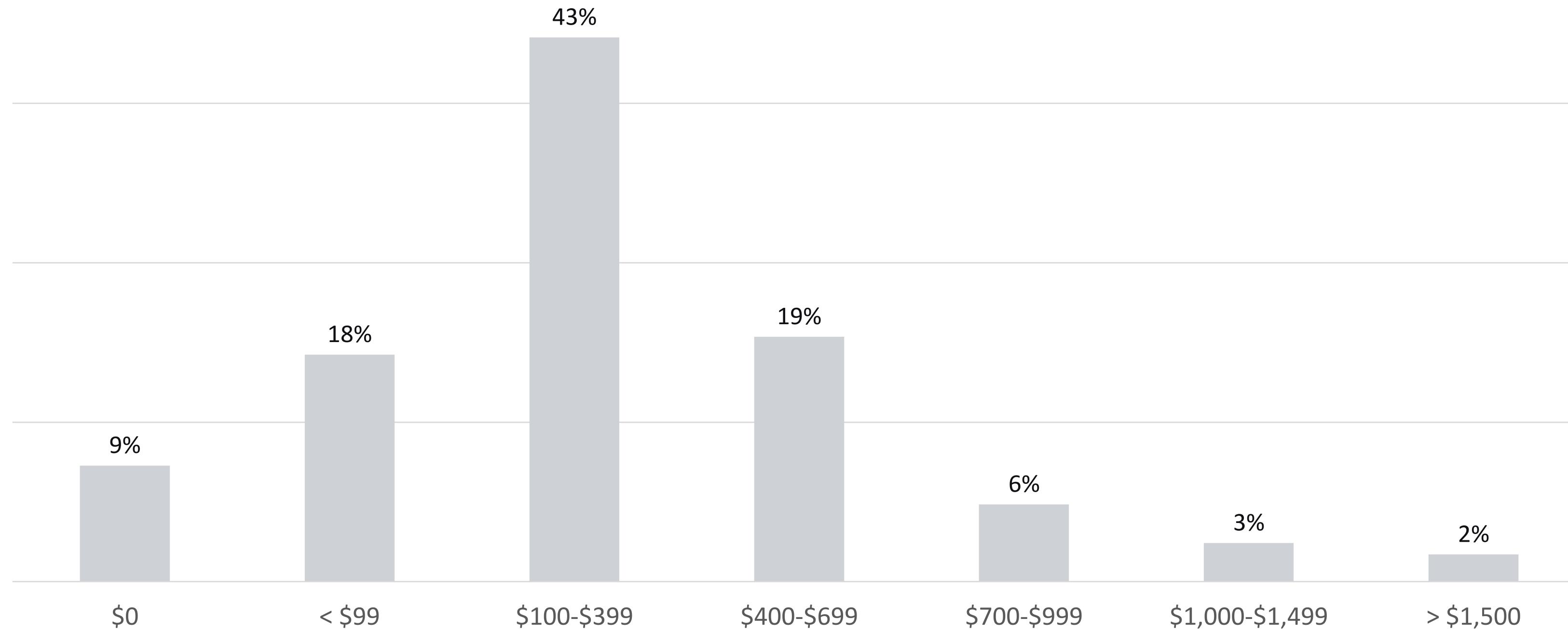
Insight:

A majority of trail runners (61%) purchase pre- or post-run supplements to aid in performance and recovery, while 39% do not.

## Trail Runners' Spend on "On-Trail" Nutrition and Running Supplements

Survey question:

**Q38** How much did you spend on nutrition ("on-trail" and pre/post-run supplements) in the last 12 months?



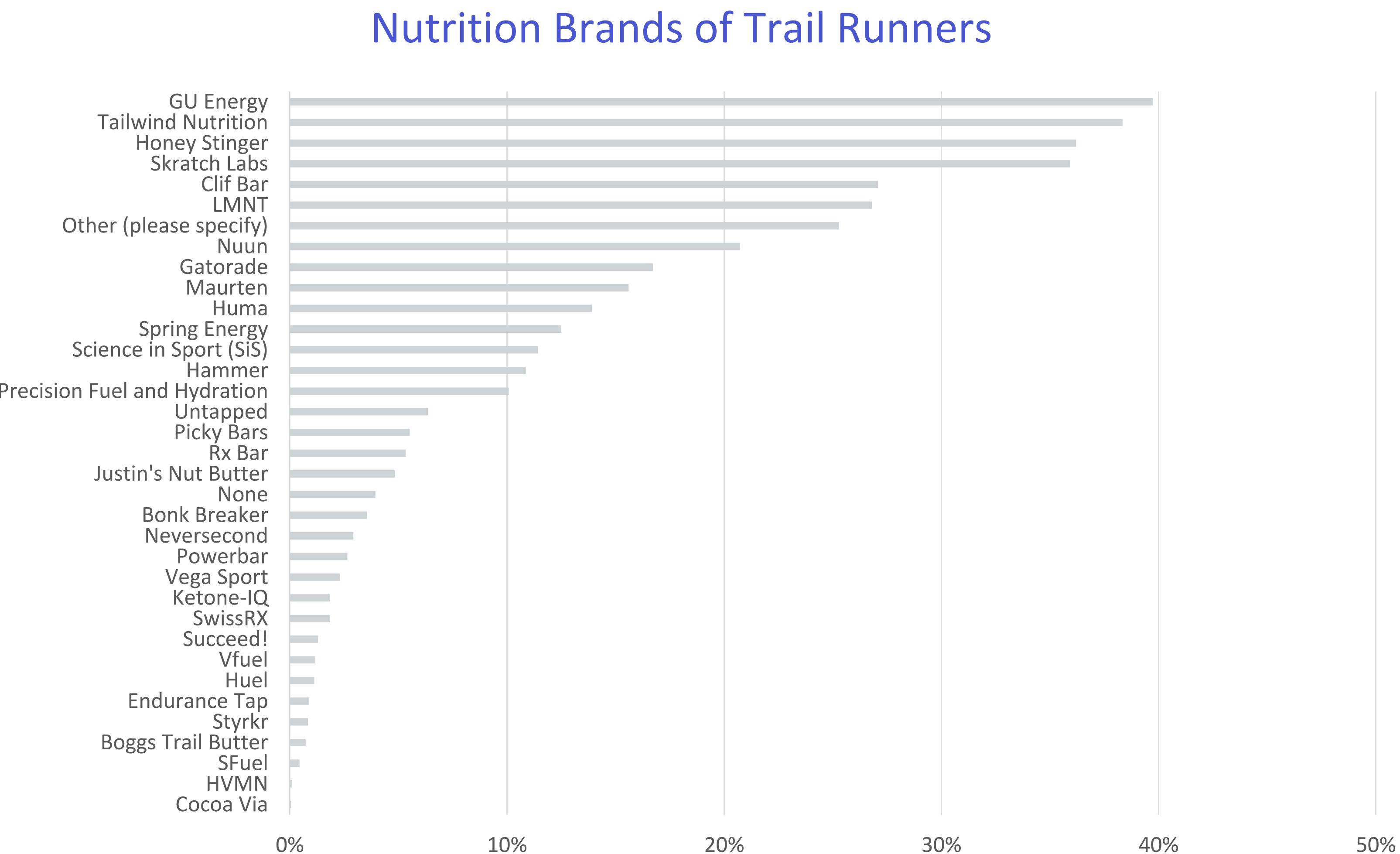
Insight:

The majority of trail runners (43%) spend between \$100 and \$399 on nutrition and supplements in the past year, while 19% spend between \$400 and \$699.

Survey question:

Q39

Which nutrition brands ("on-trail" and pre/post-run) do you prefer?



Insight:

GU Energy (40%) is the most preferred nutrition brand among trail runners, closely followed by Tailwind Nutrition (38%) and Honey Stinger (36%).

Survey question:

Q40 Which of the following types of media do you consume?

## Trail Runners' Media Consumption



Insight:

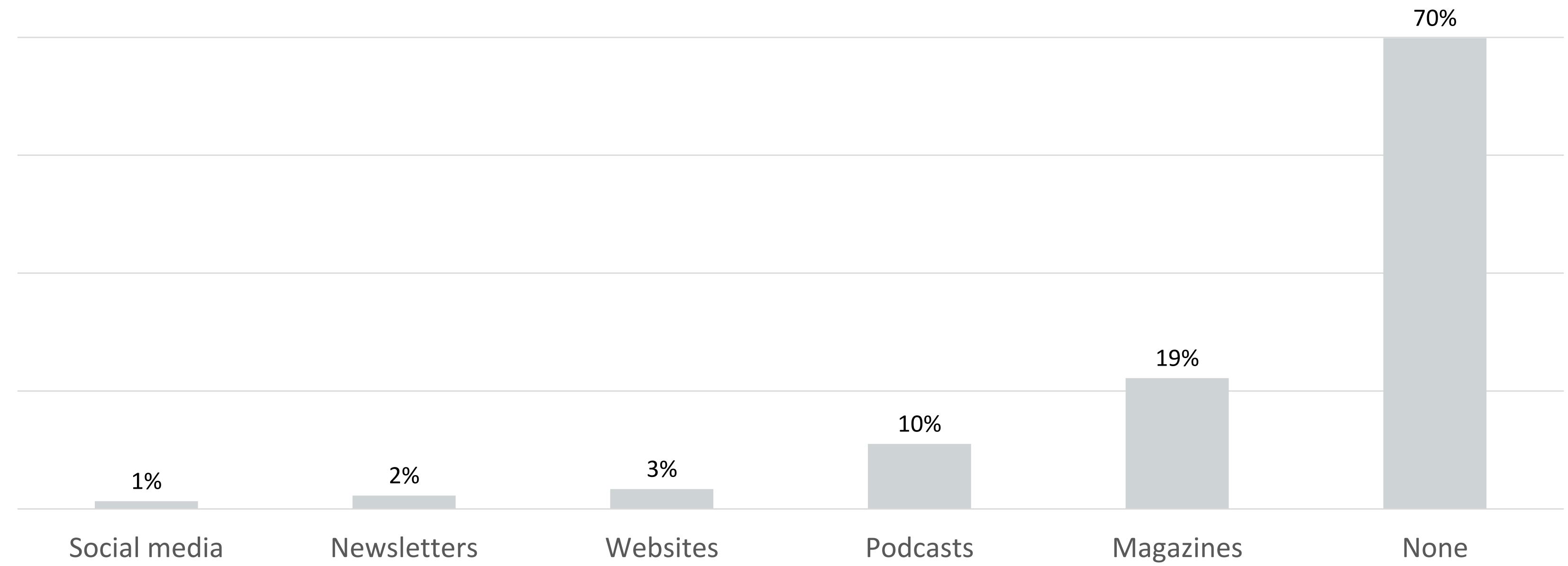
The most commonly consumed media by trail runners are social media (79%) and podcasts

## Paid Subscriptions for Tech Platforms Among Trail Runners

Survey question:

Q41

Which of these do you pay a subscription for?



Insight:

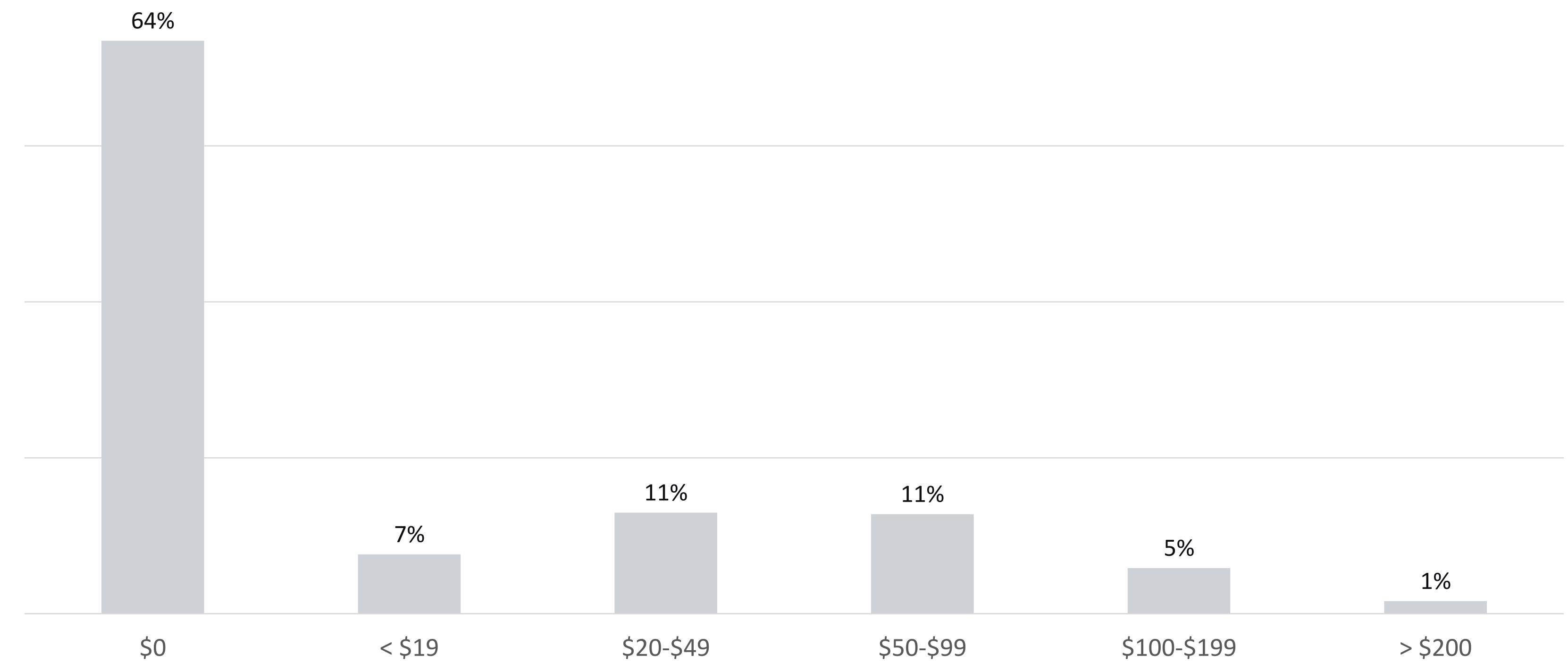
The majority of trail runners (70%) do not pay for media subscriptions. However, among paid media, magazines (19%) and podcasts (10%) are most popular.

## Annual Spending on Media Subscriptions by Trail Runners

Survey question:

Q42

How much do you spend per year on subscriptions?



Insight:

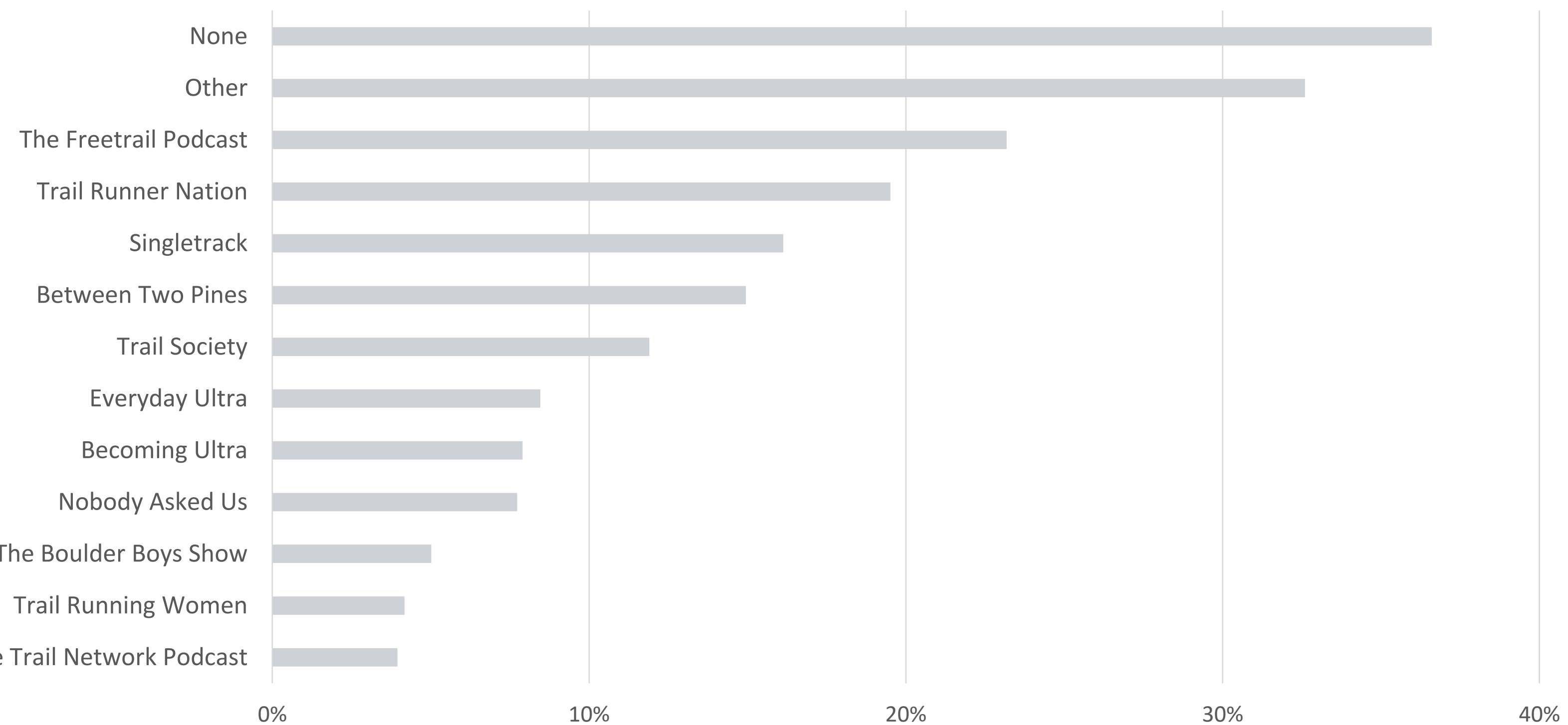
Most trail runners (64%) do not spend money on media subscriptions, with 11% spending between \$20 and \$49 annually.

Survey question:

Q43

Which of the following podcasts do you listen to?

## Trail Runners' Favorite Podcasts



Insight:

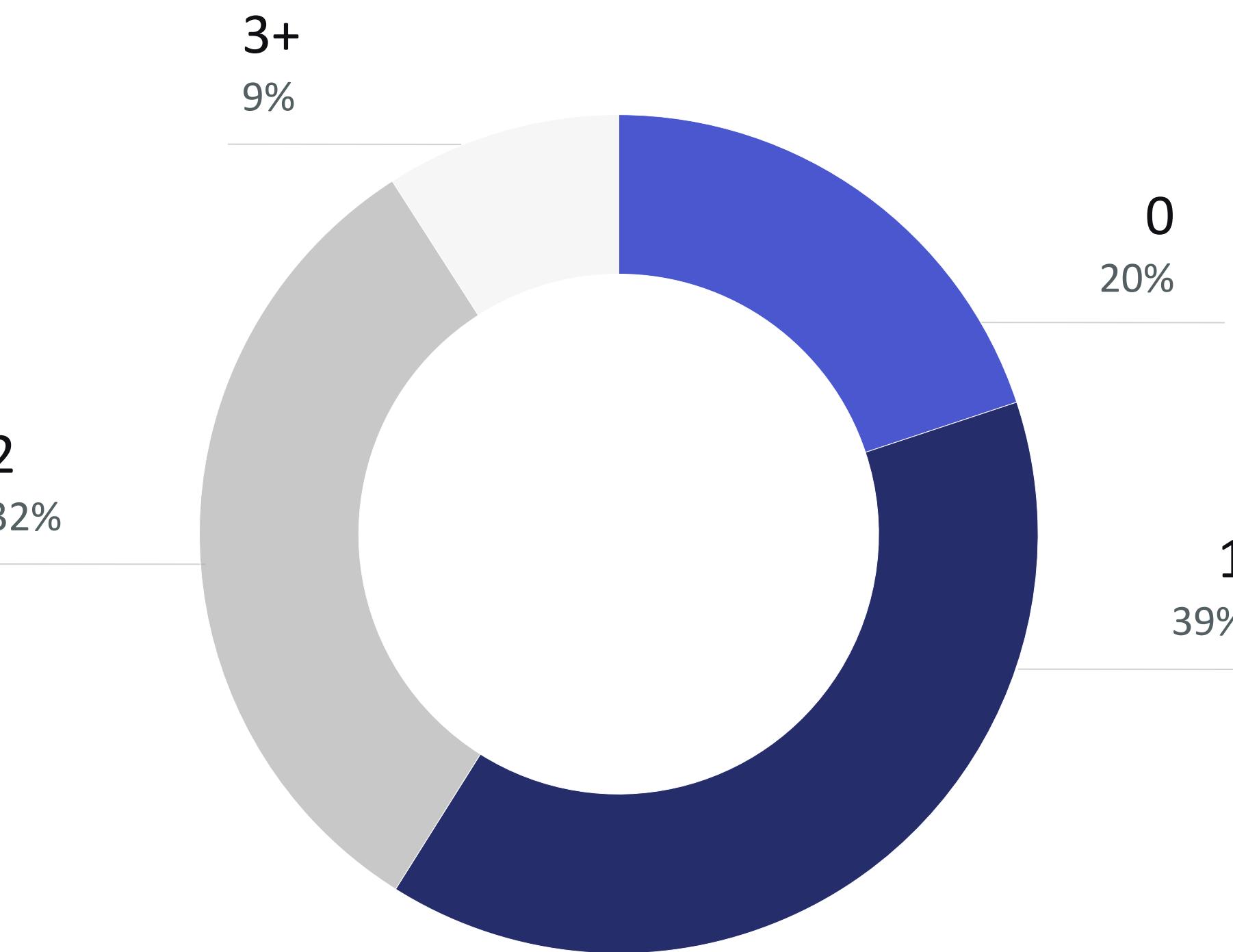
The Freetrail Podcast (23%) and Trail Runner Nation (20%) are the most popular podcasts among trail runners, though 37% do not listen to any podcasts.

## Number of Nights Spent at Race Venues by Trail Runners

Survey question:

Q44

How many nights do you typically spend at the race venue?



Insight:

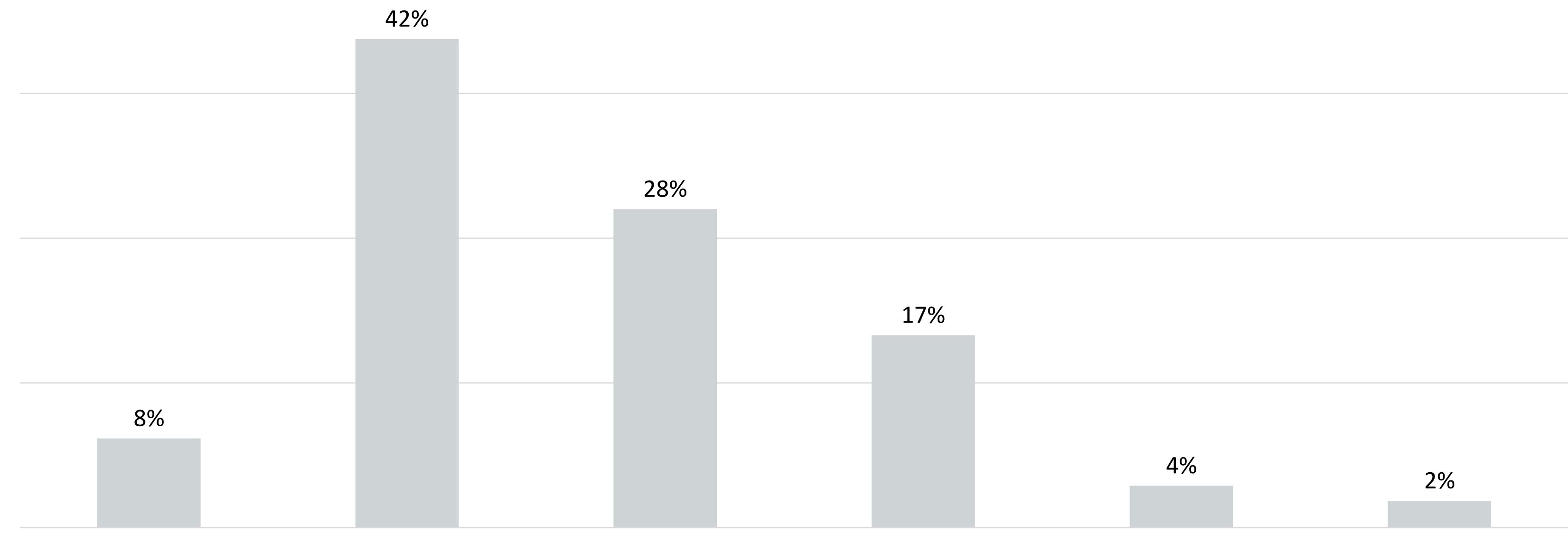
Most trail runners (39%) typically spend 1 night at the race venue, followed by 32% who stay for 2 nights.

## Preferred Accommodations for Overnight Stays at Trail Running Events

Survey question:

Q45

What type of accommodations do you prefer when you stay overnight?



Insight:

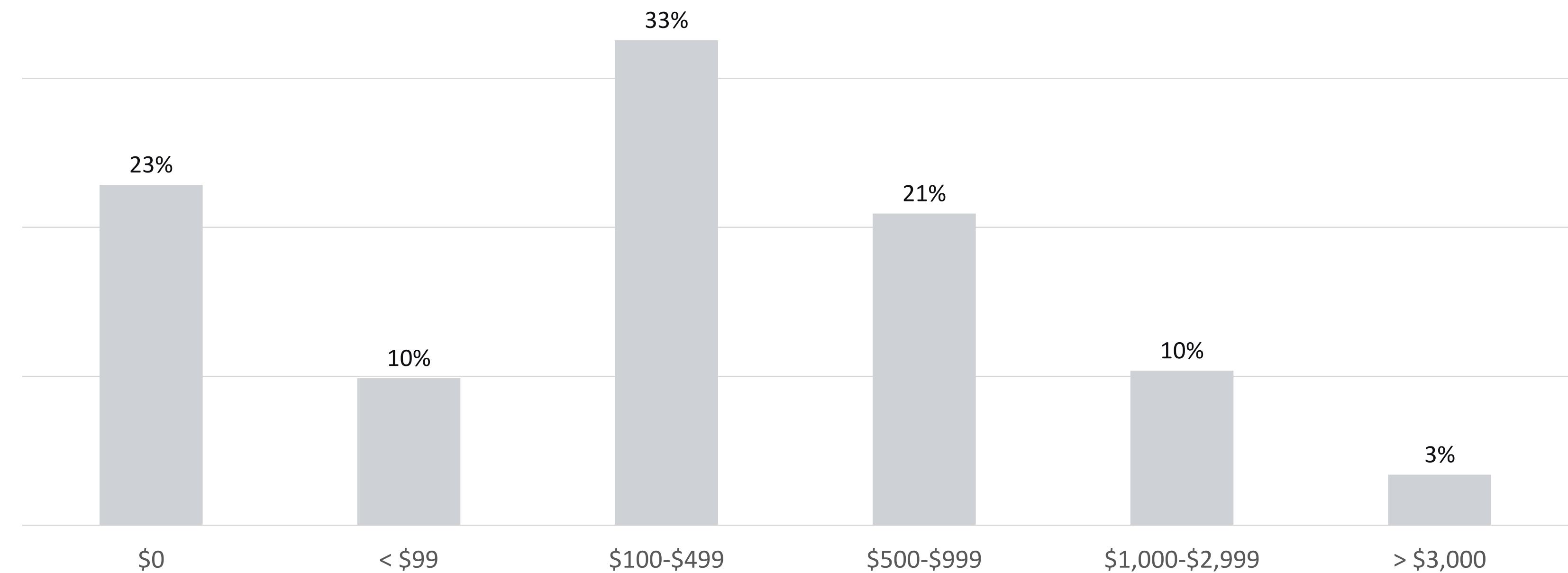
The majority of trail runners (42%) prefer staying in hotels or motels, with Airbnb (28%) and camping (17%) being other common options.

## Spending on Accommodations for Trail Running Events in the Last 12 Months

Survey question:

Q46

How much did you spend in the last 12 months on accommodations for trail running events?



Insight:

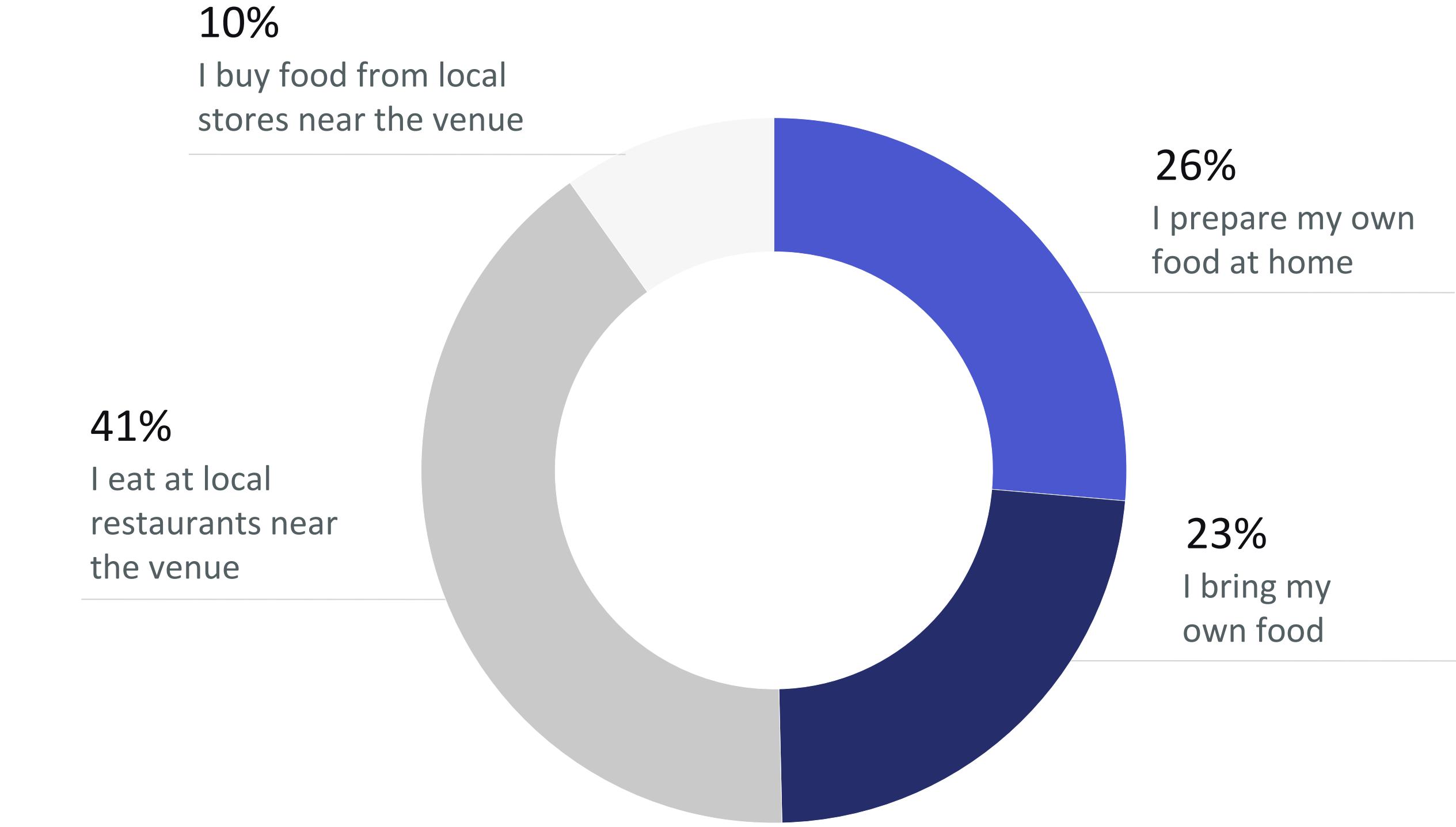
Most trail runners (33%) spent between \$100 and \$499 on accommodations for events in the past year, while 23% spent nothing.

## Preferred Eating Habits Before and After Trail Running Events

Survey question:

Q47

How do you prefer to eat before/after the trail running events?



Insight:

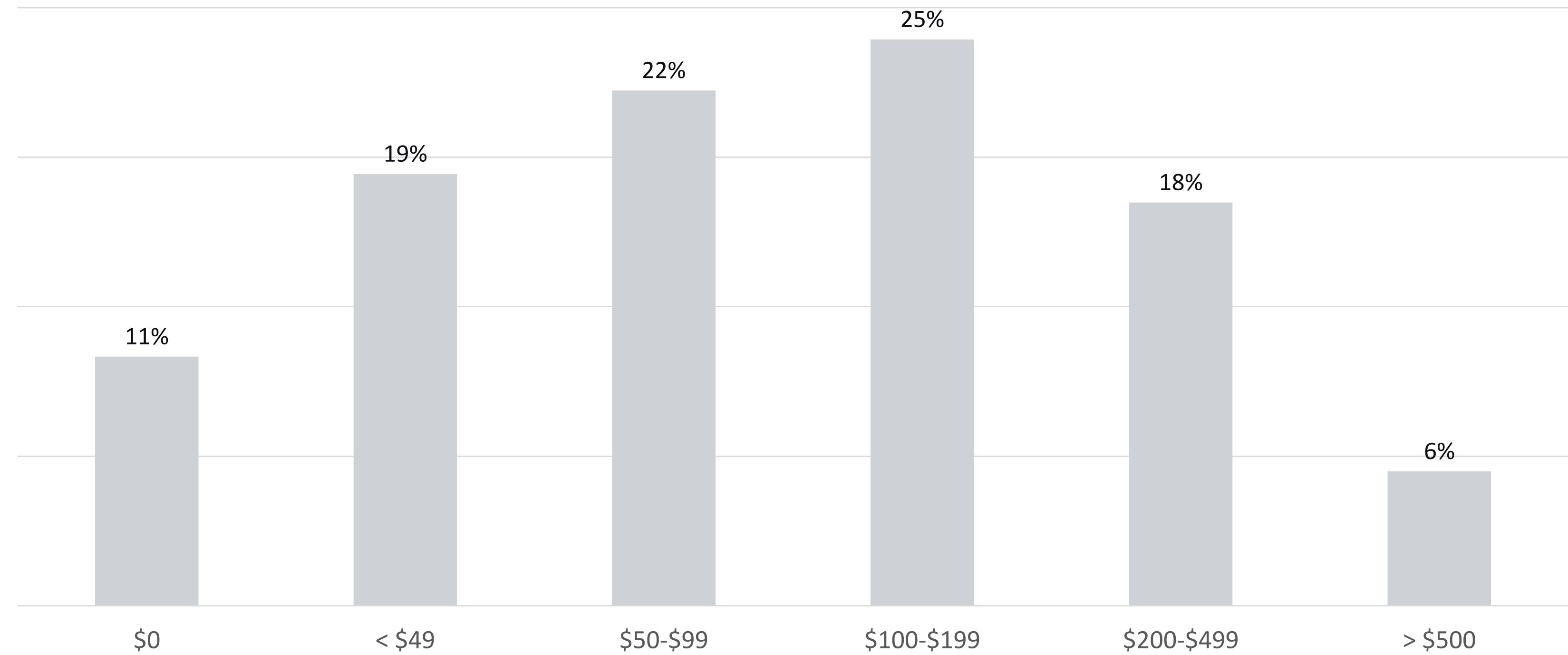
Most trail runners (41%) prefer eating at local restaurants near the event venue, followed by those who prepare their own food at home (26%) or bring their own food (23%).

Survey question:

Q48

How much did you spend in the last 12 months on food near event venues?

## Trail Runners' Annual Spend on Food at Event Venues



Insight:

The majority of trail runners (25%) spent between \$100 and \$199 on food near event venues in the past year, with 22% spending \$50 to \$99.