CHAPTER X

IMPLICATIONS OF THIS ASSESSMENT

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Outdoor recreation is complex and difficult to summarize fully. It includes a wide variety of activities and interests, ranging from canoeing to watching wildlife. In addition, many outdoor activities often occur in a variety of settings. These settings may have different characteristics and thus provide different kinds of recreation experiences. Similarly, one setting often supports an array of activities, often at the same time. Having the opportunity to participate in a mix of activities and settings is important to people as they seek satisfying and varied recreation experiences. On any given day or recreation trip, a single individual or group may participate in a number of activities across more than one setting.

A further complexity of outdoor recreation is that the meanings of and benefits from participating can be very different for different people who are doing the same activity in the same place at the same time. Research has shown that people engage in recreation activities for a variety of reasons, such as amusement, spiritual growth, better health, or relaxation. Different people may choose greatly different combinations of activities and settings to reach the same goal.

Differences in the benefits recreationists seek can translate into significant differences in their preferences for setting attributes, their perceptions of crowding or other conditions at the recreation site, their expectations about resource quality and service delivery, and their attitudes regarding management goals and methods. Different types of recreation users do share some of the same concerns about facilities and general perceptions about the quality of managed sites. However, research presented in earlier chapters has indicated that segmenting user markets based on setting-specific preferences for recreation experiences, although difficult to do, may be a managerially useful way to understand recreation site users better. As a result of their differences in preferences, visitors to the same recreation site are likely to exhibit different reactions to management prescriptions or resource changes.

Over and above the direct benefits participants get from their recreation experience, there is mounting evidence of indirect benefits of wild areas, scenic amenities, and recreation itself. There is an expanding definition of outdoor recreation participation and the scope of people who benefit from someone else's participation. Beyond the direct benefits of actual participation, economists and other social scientists have identified benefits to persons other than the visitor when measuring the values of the natural resources that support recreation. It also recognized that visitors benefit not only at the time they are participating in recreation, but also before and sometimes long after their visit to a recreation area. In addition, maintaining the quality of Wilderness and other undeveloped or unique natural or historic resources can provide benefits into the future for those who may make use of them. A growing class of beneficiaries of recreation, wildlife, and Wilderness resources includes those who engage in sightseeing, wildlife viewing, nature study, or other activities in "virtual" settings.

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SOME GENERAL FINDINGS

Wilderness Benefits Are Expanding

Wilderness continues to be important to the American public. On-site recreational use of Wilderness provides interesting, fun, and relaxing experiences to those who venture in for hikes, backpacking, or horseback trips. In addition, Wilderness users often indicate they experience spiritual growth and therapeutic healing. And beyond the benefits visitors to Wilderness receive, many people who do not actually visit Wilderness areas obtain passive benefits based on knowing the areas are preserved as a natural or environmental trust fund.

Recreation use of Wilderness is difficult to measure. Some estimates of Wilderness use are on the order of 40 million visits per year. Forecasts of future use indicate a trend of increased use per acre. This trend is driven by decreasing amounts of publicly-owned land parcels that are large enough and wild enough to be classified as Wilderness, relatively slow growth in additions of qualified roadless areas to the National Wilderness Preservation System (NWPS), and an ever-increasing number of people who want access to the unique opportunities afforded Wilderness settings. Moreover, access to substitute venues on private lands are diminishing more rapidly than public venues, so more of the total use pressure is shifting to publicly–owned Wilderness. As this trend continues, easily accessed Wilderness areas will likely be pushed to their limits in accommodating human use while still maintaining their wild character.

The contributions of Wilderness to national welfare through passive and off-site benefits will likely become more important in the future as these wild areas become increasingly scarce and unique. Preserving the ecological integrity of Wilderness areas is paramount to maintaining the benefits they provide as a form of environmental trust fund. To this end, the need to preserve ecological integrity may take precedence over and thus limit recreational use of Wilderness areas in the future. Further, for the NWPS to be a complete system, there is pressure to have all ecological types found in the United States represented by areas within the system. Currently, four ecoregions that together comprise over 20 percent of the land area of the continental United States are not represented in the NWPS.

The Outdoor Recreation Market Is Expected to Continue to Grow

Both recent trends and future projections point toward continued increases in the number of participants, trips, and activity days for outdoor recreation across almost all activities and among all regions. Among the top activities in trips, activity days, and percent of the population participating are visiting a beach or waterside and swimming in lakes, oceans, and streams. Both of these activities are expected to grow at or above the rate of the increase predicted for population, meaning that they will continue to be among the most important activities for most Americans. However, the water resource base that supports these activities is finite. In order to minimize crowding and likely reduction in enjoyment of water-based recreation, it will be necessary to maintain the availability of as many as possible of the areas now provided. Thus, water quality improvement and various means of access to water resources are issues that can be expected to remain and grow in importance in the future.

For over half the activities examined in the previous chapters, projections indicate that participant growth will be faster than population growth. This trend implies that a growing proportion of the population will participate in the future. But growth across types of activities is not expected to be equal among regions. The greatest percentage of increases in winter and water activities will likely come from residents of the two western regions. However, the majority of participants, trips, and activity days will continue to be accounted for by residents of the eastern regions, given their much larger population base. For almost all developed and dispersed land activities, the greatest percentage increases in participation will be in the South. The slowest growth rates will be in the North, due primarily to the slowing rates of population growth predicted for that region.

Across all types of activities and all regions, the outdoor recreation activities that occur in developed settings, including developed water and developed winter settings, are expected to show the greatest absolute increase in numbers of participants and recreation trips. Percentage increases in these activities are expected to exceed population growth rates. Along with projected population increases, projected increases in mean income of almost 90 percent by the year 2050 are likely to have strong positive effects on both participation rates and intensity for many activities. However, these projections assume that the distribution of income within the population will remain constant, which it has not in recent years. The proportion of people in the "middle class" has gotten smaller, and there has been a widening gap between the very rich and the very poor.

Should this trend continue, participation could be greatly altered. In addition, because the baseline levels of participants, trips, and activity days are relatively high, even small percentage increases in the proportion who participate can mean fairly large absolute changes.

As is the case with outdoor recreation in general, Wilderness visitation is also expected to increase quite rapidly, particularly for National Park System-managed areas. Other than visits to designated Wilderness areas, growth in activities that require extensive open spaces, such as hunting, backpacking, snowmobiling, and primitive camping, are expected to grow fairly slowly. Even so, there will be increases in participants and activity levels for most of these activities, albeit at rates somewhat less than population growth and the rate of growth of many other forms of outdoor recreation participation.

Access to the Private Land Base for Recreation Continues to Decline

A key resource supporting many different types of outdoor activities in the past has been private forest land. But ever fewer landowners allow public access to their lands. In three of the four assessment regions, the proportion of owners allowing public use declined by at least 35 percent from 1985 to 1995. Couple this decrease with the continued conversion of forest and agricultural land around cities into housing, shopping venues, and other developments, and that leaves large tracts of undeveloped public land to support a growing share of dispersed forms of recreation activity. Because the public lands, and especially the federal resource base, are generally not located near cities, visiting these types of settings is likely to involve a greater amount of travel and hence domestic tourism activity.

The extra pressure on large public holdings to support dispersed forms of recreation is likely to be especially heavy in the eastern portion of the country. The North and South contain the majority of recreation participants, but have a relatively small public land base. Thus, declines in access to undeveloped private forest lands in those regions will likely press a proportionately greater amount of dispersed recreation use pressure onto public lands.

Increased Demand for Nearby Recreation Resources

Across a fairly high proportion of the activities examined in the previous chapters, the projected increases for activity days (days during which some time is spent in an activity) are far greater than projected increases for trips. One interpretation of this projection is that fewer days of recreation participation will occur during a trip, while more days of participation will take place close enough to home that a trip is not necessary. For example, an evening walk or bike ride on one of the many greenways or rail trails that have been completed in suburban areas in the last 10 years would count as a participation day in those activities, but would not require a trip. As a result, neighborhood or other local outdoor spaces, possibly including forested land owned by family or friends, will be under greater pressure to serve a higher proportion of overall recreation demand. It is reasonable to expect that less affluent people in our population in particular will make greater use of nearby recreation opportunities. Transportation to recreation opportunities serving local areas is usually inexpensive and often has low or no user fees.

Another finding of this assessment is a continued trend toward multiple-activity but shorter-length trips. The increased frequency of two-income households has two important effects that support this trend. First, long (two or more weeks) vacations are more difficult to plan, because both workers must coordinate vacation time. Second, the added stress of parenting in a two-income household makes more frequent getaways desirable. The emphasis of the trip shifts to providing a variety of activities on any given trip. Indeed, nearly 10 percent of those surveyed in the NSRE about their last trip reported that the trip had no primary activity. This trend will likely mean that there will be increasing demand for easily accessed (drive to) recreation opportunities, and for recreation areas that can serve multiple needs and support a variety of activities near one another. An example might include areas that have both developed and dispersed setting opportunities in close proximity.

The recent Southern Appalachian Assessment found that many of the "hot spots," areas with consistently high levels of visitation, had both land and water features. Examples include campgrounds, trails, or other land resources adjacent to lakes or rivers. It is expected that managing such areas will become increasingly complex as more users and more diversity in types of use lead to increased conflicts among visitors.

People have always engaged in the types of recreation activities that they are most familiar with, often those most readily available to them. This practice is clear from the regional differences in participation among activities (for example, less winter activity by Southerners and more camping and adventure participation in

Western regions) and higher participation rates among rural people in activities such as hunting, fishing, and primitive camping. Further evidence is the frequency that inadequate time or insufficient access are listed as primary constraints to participation. Without doubt, the search for variety and increases in participation across a broader array of activities will be a force in the future that shapes many recreation trips and drives an ever-increasing level of recreation participation.

Resource Changes Have not Been Equal Across Regions or Settings

There has been a relatively large increase in developed facilities over the last 10 years, particularly in the East, which has greater population. Obviously related is growth of participation in developed site activities at rates exceeding other types of participation over the same time period. Higher levels of services and facility development are continuing to occur at private recreation facilities, including campgrounds and marinas. In addition, more development is occurring in state park systems and in federal systems. These changes are likely to reinforce the projected increased demand for developed recreation settings across the country, regardless of whether the providers are in the public or private sectors.

Two forces helping to fuel increases in developed recreation opportunities are the expanding needs for new sources of funding for state and federal providers and the increased emphasis on outdoor recreation as a rural development tool. At the federa,l and even more so at the state level, inflation-adjusted funding for management and operation has leveled or declined in recent years. Increasingly, user fees are being instituted as a way to augment appropriated financial resources. However, assessing fees for use of undeveloped public lands is usually more difficult than charging for access to developed facilities. In addition, contracts for concessions or "privatizing" the operation of public parkland usually requires some sort of developed facility through which the private partner can generate revenue.

Using recreation for rural development means having nonlocal visitors travel to and spend money in the rural areas where the recreation attraction exists. Undeveloped lands provide only modest opportunities for visitors to spend money on goods and services associated with a recreation trip and may not draw many outside visitors. A variety of developed recreation attractions greatly increases the tourist draw of an area and increases the amount of money visitors could be expected to spend while visiting. Thus, developed recreation facilities are a necessary component in the more successful rural development strategies.

Losses of access to private land through land-use conversions, closure, or leasing, have reduced opportunities for dispersed recreation on extensive tracts of undeveloped lands for many Americans. Increased facility development on state parklands has further reduced this type of opportunity. Public Wilderness areas are less and less able to accommodate increases in recreational uses. As a result, other publicly-owned undeveloped lands are receiving a growing share of the pressure for natural settings for engaging in activities that require extensive acreages of land or water.

Regional per capita availability of opportunities for recreation participation has been declining most noticeably in the Pacific Coast region. That decline has been largely due to population increases. In contrast, despite significant population growth in the last 10 years in the South, per capita resource availability has been relatively stable in that region. A fairly high degree of demand growth is expected by residents of the South in the future. The expected participation growth in the North may offset the relatively large recent gains in state parklands and trail resources in that heavily populated region.

SOME MORE SPECIFIC OBSERVATIONS

In addition to the more general observations offered in the preceding section, there are a number of more specific points worthy of mention.

Access

Rising levels of outdoor recreation activity, coupled with increased diversity in equipment, user groups, and modes of participation, are resulting in increased competition for the recreational resources of this country. A common theme of the user groups writing for Chapter V is the increasing challenge of having and keeping access to the most desirable places and spaces. Competition is especially evident between motorized and nonmotorized users (water, snow, and land), on-foot and riding participants, fast-moving versus slow-moving styles, highly specialized versus novice participants, risk/adventure versus sensing/learning-motivated users, and commercial versus private users. Fair approaches to allocating the increasingly limited per capita opportunities will be central issues in both public and private recreation management in the future.

Resource Impacts

Public land managers, environmental interests, and recreation users all cite in one way or another concern over how natural resources are recreationally used in this country. Greater numbers of users, more use of mechanized equipment, and easier access to backcountry are combining to impact the resource base, especially in fragile ecosystems. Resource impacts are likely to intensify in some of the more popular places and widen to others as use pressures increase.

Management Evolution

Approaches to providing and managing recreation resources will have to evolve and adapt if recreation opportunities are to keep pace with demand growth. New approaches will need to account for reduced or stagnant funding, shrinking access to private lands, greater frequency and intensity of crowding, and unprecedented patron levels, diversity, and styles. The fiscal, policy, and customer need environment in which managers operate is itself new and constantly evolving. Charging fees and doing so in different ways, improved education techniques about recreation and historic resources, improved use of electronic media for information dissemination, and comanagement between users and providers are among many options for adapting to these changing conditions.

Benefits-based Management

Increasingly, there is interest in doing a better job in the public sector of providing high quality recreation experiences. The private sector receives market signals to guide its investment and operational decisions. The public sector must employ other means to understand what the customer of recreation opportunities is looking for and what attributes and services are most important to satisfying experiences. All recreation visitors to public lands and water seek to obtain benefits from their participation. Managing the benefits received from recreation resources transcends the more traditional approach of managing to provide capacity for recreational use. Benefits-based management is spreading to all levels of government, in part because of the efforts of committed scientists and other professionals to help the recreation management community better understand the merits of this innovative approach.

Improved Data

In the 1960s and 1970s there was growing and widespread interest in creating workable and comprehensive data bases covering recreation facility amounts, access, condition, use levels, and demand. Federal and state agencies worked hard at creating national and statewide systems for keeping track of outdoor recreation. At the time, the recreation industry relied very heavily on government statistics for information to guide investments. Interest in extensive data systems at government levels waned in the 1980s and has only very recently waxed anew. Private industry, however, has continued to improve its capabilities. Neither the private nor public sectors, however, have fully addressed the need to develop a system for tracking the markets, use patterns and levels, emerging trends, inventory of opportunities, complementarity of opportunities, and other macro aspects of outdoor recreation. All agree, however, that good data on these issues are needed for planning, investing, and adaptive management. The current rise in interest in improved data and analytical capability is very likely to continue and will include innovations such as GIS and GPS capabilities, real-time tracking, integration of industry, and public sector data bases and reporting.

Better Understanding the Enthusiasts

Outdoor recreation is a part of life for almost 95 percent of the people living in the United States. But for most of those who participate, involvement is not frequent. The enthusiasts described in Chapter V (the one-third of participants who participate the most) account for between 60 and 90 percent of all days and trips for outdoor recreation. Yet, enthusiasts are typically only 10 to 15 percent of the participant population for many activities. Particularly for some activities where enthusiasts account for at least 80 percent of the participation days and trips, a much better understanding of their motivations, expectations, and outlook on management is needed. First of all, for these devoted participants, assuring they receive high quality service depends on knowing what they are looking for in their recreational experiences. Second, comanagement (or user participant

management) is most likely to come from the enthusiasts most interested in the resources they use, for example, protecting white water segments of rivers.

Collaboration

Increasingly, interest groups will collaborate with public agencies to set the course of management of natural resources. Collaboration in this sense does not mean just one agency working with one user group on a single project or site. Rather, it means all parties interested in better outdoor opportunities will work together to meet common goals. This broader notion of collaboration must include stakeholders across the spectrum of resources and management challenges. Broad-based and broad-scoped collaboration with open sharing of ideas, concerns, and proposed solutions to issues is the approach most likely to succeed in the long run as competition for open space and facilities continues to be a major trend. With collaboration at the planning and policy levels, comanagement becomes a more viable option.

The Underserved

Participation in some forms of outdoor recreation is possible for only a small portion of the United States' population. Some activities, such as horseback riding or sailing, require huge monetary investments. Other forms, including rock climbing, white water kayaking, and fly fishing, require a high degree of physical ability and/or skill for participation. Some others require ownership, acquisition of a lease, or other special access rights to large rural tracts in order to have a place for participation. In general, however, participation in most activities is possible for the majority of Americans. Despite that, there are growing numbers of people in the United States who face significant barriers to participating in recreation. These people include the very poor, inner-city residents with little access to or information about outdoor opportunities, and people with disabilities of one form or another. While local governments provide a considerable amount of opportunities for these segments of society, we need to know more about the needs and lifestyles of underserved populations. Then all providers can be aware of how well their services and opportunities are being delivered.

COMPARING TRENDS IN PARTICIPATION AND RESOURCE AVAILABILITY

Across the country, there are two types of resource settings for which it seems likely that an imbalance between recreation demand and the available amount of recreation opportunities will occur. These imbalances can be identified as those for which there is declining per capita availability of opportunities for the outdoor activities that occur in those settings, while at the same time there is expected increases in demand for those activities at rates that exceed expected rates of population growth. The two settings for which imbalances are most likely are flatwater resources, such as lakes and reservoirs, and extensive, undeveloped land settings.

Across all regions, participation in water-based recreation is expected to increase at rates at least as fast as population. Although there have been significant increases in availability of river resources for recreation in the last 10 years, in three of four regions the great majority of people have experienced declining per capita availability for flatwater and coastal resources. Opportunities for activities that require an extensive land base have also been declining for most people in the country. Participation in some activities, such as hunting, that make use of this resource setting are expected to decline. However, there are a number of other activities that occur in this setting, such as backpacking, hiking, off-road driving, and snowmobiling, that are expected to increase significantly.

Each region has some supply-demand imbalances that are of particular regional interest. Regional differences in trends in resource availability result in expectations of different settings being more or less abundant among the regions in the future. Variation across regions in predicted population changes and income growth are the factors primarily driving expected differences among regions in the predicted growth rates in participation.

North

The most important imbalance between recreation supply and demand in this region is in flatwater resources. More than half of the region's populations live in areas where the availability of such resources is less than the national average. Fewer than two percent of the population have experienced increases in resource

availability over the last 10 years. However, the number of participants and days of participation for most water activities, including motor boating, canoeing, swimming, and rafting, are expected to increase faster than population growth in the future. Declining per capita availability coupled with increased demand likely signals a situation that will need focused attention by resource planners in the future. Competition for these types of resources may be exacerbated by the greater demand for domestic uses of water that will result from population increases.

Fishing opportunities per capita are also declining in the North. However, the number of days of participation for fishing and the number of fishing participants is predicted to grow in the future. This disparity will further heighten the focus on water-based recreation in the North. From a social equity standpoint, addressing any imbalance between fishing demand and available opportunities may be salient because all races participate in fishing at about the same rates. Because some racial groups have less access to other types of opportunities, imbalances regarding this activity are more likely to affect minorities negatively.

There have been reductions in the availability of privately–owned rural land through its conversion to other uses. There have also been reductions in the per capita availability of large tracts of federal land because population has increased but the resource base has not. Dispersed activities such as backpacking, snowmobiling, and hiking are predicted to grow faster than population. To the extent that dispersed activities occur in these resource settings, a potential imbalance could result.

South

Similar to the North, coastal and flatwater resources are recreation settings that are finite, and opportunities to recreate in them have not increased as fast as population in the South. However, access issues are not as prominent for the resources of this region as they are in the North. Participation in water-based activities, including motorboating, swimming, canoeing, and visiting beaches, are all predicted to grow faster than population for Southern residents. Fishing participation is also predicted to grow. Thus, for the same reasons as listed for the North, water-based recreation settings may represent potential gaps between demand pressures and supply availability in the South.

Corps of Engineers, Tennessee Valley Authority, and private utility companies are prominent providers of water-based recreation opportunities in the South. Their reservoirs and other projects are typically close to population centers, and they represent vast areas of water surface. Their properties provide opportunities for developed camping and many other activities. It is possible that the more rapid growth in demand for water-based recreation will put additional pressure on these agencies not only to expand access to water resources, but also to meet additional demands for camping, fishing, hiking, and other activities that people often combine during their visits to lakes and reservoirs.

A second resource area that may be of concern for residents of the South is availability of winter opportunities. Participation in both downhill skiing and snowmobiling are predicted to increase much faster than population growth over the next 50 years. Per capita resource availability to support these activities, for obvious reasons, is going to be relatively stable for most of the population in the region. For most residents of the South, there are no winter sport areas close by that consistently support winter recreation. It is not likely that much can be done about improving opportunities within the region. The portions of the region where such resources are found, such as in western North Carolina, and those in easily accessible portions of other regions, such as southern West Virginia, could well experience excessive levels of demand.

Rocky Mountains/Great Plains

In this region, there are four types of recreation resources that have shown declining per capita availability over that last 10 years. For two of these four resource types, flatwater resources and urban, developed resources, most residents of the region have below-average levels of availability now. However, for the other two, agricultural and range lands and developed camping, the majority of the region's residents still have greater than average levels of availability compared to the nation as a whole. As a result, it is not clear that the availability reductions for the first two resource settings will lead to significant constraints on recreation activity. About the only activity that could be constrained by this resource situation and that is predicted to grow at a relatively high rate in the region is developed camping.

Several water-based activities are expected to grow at rates that outpace expected population growth in the region. These activities include motorboating, non–pool swimming, canoeing, and visiting a beach or waterside. Unfortunately, this is a region that is not widely endowed with resources to support such activities.

Fewer than five percent of the region's residents live in areas that have had stable per capita availability for flatwater resources over the last 10 years. Further, more than three-fourths of the region's residents have below-average accessibility to this resource setting.

Developed, urban resources have increased less rapidly than population growth in this region. As a result, per capita availability has declined. These types of resources are important for many people and are used frequently because of their proximity. Activities including biking, picnicking, family gathering, sightseeing, and walking are predicted to grow relatively rapidly in this region. In addition, many of these same activities are done now by a large portion of the population and are done very frequently by those people who participate in them.

Pacific Coast

Per capita availability has declined for a number of resource settings in this region over the last 10 years, including developed urban resources, coastal resources, developed camping opportunities, and agricultural and range lands. However, for all of these settings, almost all residents in this region still have a greater level of availability than do residents of the other three regions. So while there have been reductions, those reductions have come in resource settings for which residents had a relative abundance of opportunities. As a result, it is not clear whether reduced availability of outdoor recreation opportunities will lead to any imbalance between supply and demand. Quite a large number of activities dependent upon the above settings are predicted to have increases in participation at rates faster than population growth. It is therefore possible that imbalances for some or all of them may occur. But it is not clear how likely imbalances are to occur in these activities that include downhill skiing, visiting a beach or waterside, developed camping, picnicking, family gathering, sightseeing, off-road driving, hiking, and backpacking.

PERPETUAL MOTION, UNICORNS, AND MARKETING IN OUTDOOR RECREATION

Francis Pandolfi observed in the beginning of this book that "perpetual motion, unicorns, and marketing outdoor recreation all have one thing in common—many people believe them to be fiction." We have seen in the data, analysis, and discussions as this book has unfolded that outdoor recreation is still a strong growth area in our American economy and in American life. We observe that far from the "maturing market" image some have portrayed, it is a growing market. For both the private and public sectors, this growth offers both challenge and opportunity.

For the private sector, growing and widening interest in outdoor recreation is expected to offer opportunity for growth in many existing markets and the emergence of new markets for services, equipment, and facilities. The United States economy is currently strong and is expected to remain so for the foreseeable future. The challenge facing the private sector is to influence both the political and market systems such that access to outdoor settings remain available and can expand to meet predicted demand growth.

For the public sector, the challenge will be to find ways that work for continuing to provide opportunities for recreation participation for a growing and diversifying American public. Marketing outdoor opportunities in proven ways that result in better user as well as provider stewardship of the natural resource base, on which much of outdoor recreation depends, is likely to become an increasingly workable and acceptable approach. The opportunity is to change approaches that no longer work and create new approaches to meet conditions unlike those of the past.

As both sectors march into the 21st century, we can see the lines between private and public sectors blurring as both increasingly work together to provide appropriate and adequate outdoor recreation opportunities. Neither will relinquish its basic motivation for operation—profit for one, public service for the other. But as demand for outdoor recreation continues to grow, it seems it will take a collaborative effort to provide the opportunities Americans seek in their lives.