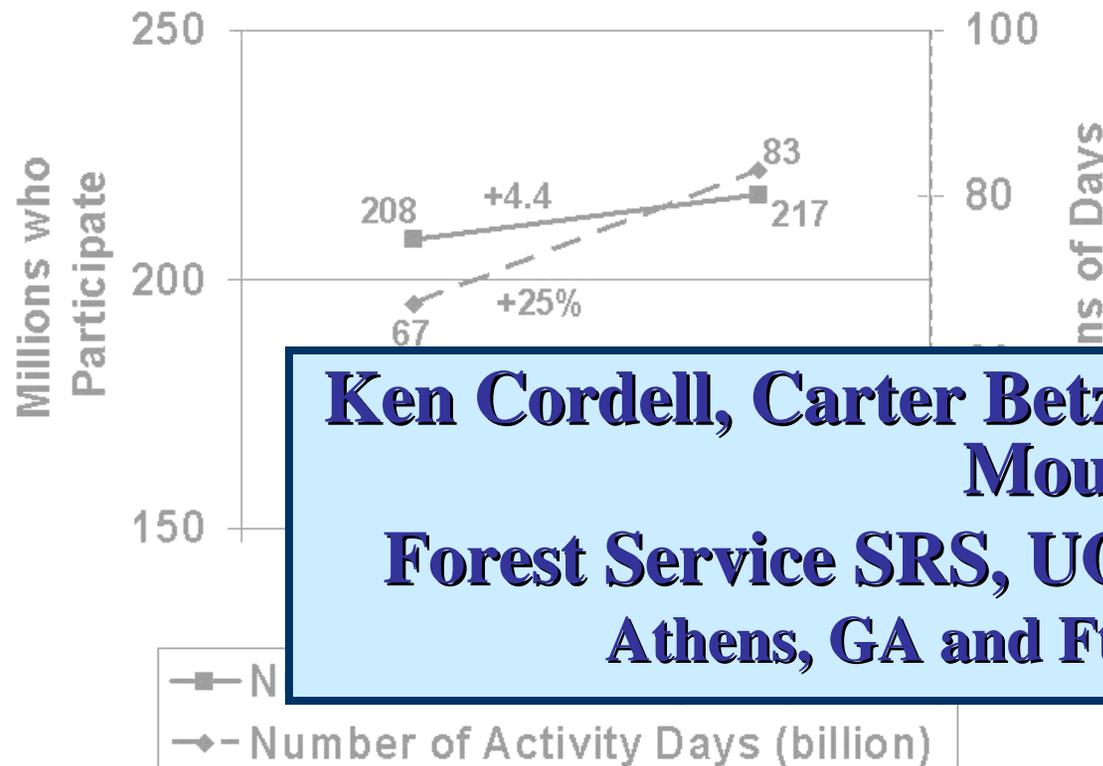


Recreation Demand Trends---An Update

May 5, 2009



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<http://warnell.forestry.uga.edu/nrrt/nsre/index.html>

Outline

- **Drivers of Trends**
- **Some recently reported outdoor recreation trends---Up through 2007**
 - Outdoor recreation generally
 - Nature-based recreation specifically
 - Forest recreation especially
 - Visitation to public land
- **Current changes in drivers of trends**
 - Gasoline, the economy,, Others
- **Kids**
- **Current Trends and Summary**



<http://warnell.forestry.uga.edu/nrrt/nsre/IrisReports.html>

What got us started looking at current trends-

- **The Pergams/Zaradic article February, 2008**

- Postulated that NP visits is a good proxy for visiting nature in general
- “If we are also seeing declines in the majority of other nature-related activities, it becomes quite likely that we are seeing a fundamental shift away from people’s interest in nature.”
- “...as today’s adult role models spend less time in nature, this generation of children is also likely to follow suit.
- They argue (with this I agree) that less nature experience may be associated with less support for conservation
- The authors report declines in NP, SP, NF and BLM visits (PER CAPITA, **Not Total**)
- **The research question was: “Is there a general and fundamental shift away from people’s participation in nature-based recreation and interest in nature?”**

USDA Forest Service
Research and Development

Source

RPA Assessment



- **The Forest Service's Resources Planning Act (RPA) Assessment examines the status and futures of the Nation's renewable resources on all forest and rangelands.**
- **Renewable resources evaluated include fish and wildlife, water, forests, range, wilderness, as well as the demand for and ability of these resources to provide outdoor recreation opportunities.**

www.fs.fed.us/research/rpa/pubs-supporting-interim-update-of-2000-rpa-assessment.shtml

Primary Data Source is National Survey on Recreation and the Environment---NSRE

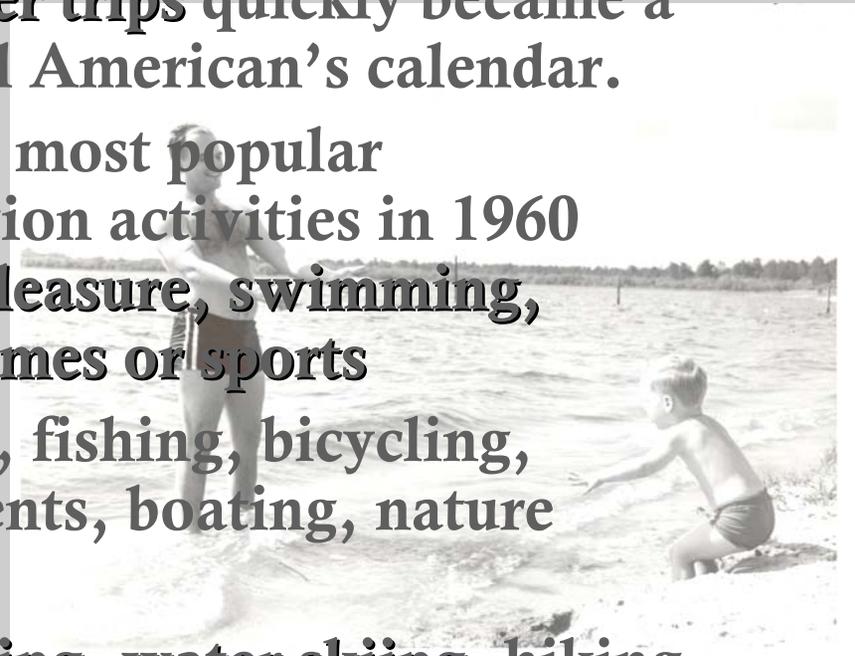


- The Athens **Forest Service** Research Group has been collecting data since the 1980s.
- The core of the NSRE survey covers outdoor recreation and personal demographics. It originated in 1960.
- NSRE is a **cross section survey of non-institutionalized residents 16 years or older.**
- Since 1999, the annual sample has been 5,000, or more, per year.
- Respondents are asked about more than **80 outdoor activities**
- Two primary partners, the **University of Georgia and the University of Tennessee.**
- NSRE is the demand data base for **half the states' SCORPs**

A Quick Recreation History

THEN

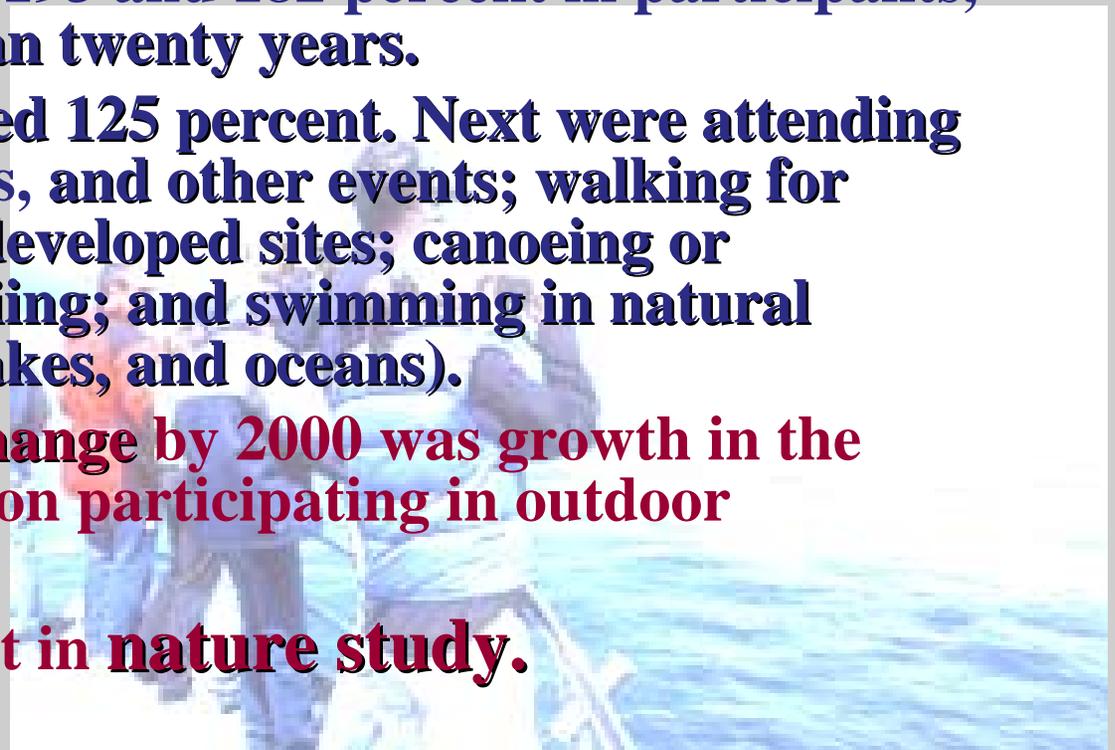
- In 1960, the U.S. population reached about 180 million. Along with increasing affluence, population growth boosted demand for outdoor recreation.
- **Family vacations and summer trips** quickly became a significant part of the typical American's calendar.
- As reported by ORRRC, the most popular summertime outdoor recreation activities in 1960 were, in order, **driving for pleasure, swimming, walking, playing outdoor games or sports**
- Also sightseeing, picnicking, fishing, bicycling, attending outdoor sports events, boating, nature walks, and hunting
- And camping, **horseback riding, water skiing, hiking,** and attending concerts or other outdoor events.



40 Years Later

By 2000

- By 2000, the population had risen to around 281 million (growing over 3 million per year)
- Viewing and photographing birds had become the fastest-growing activity in the country.
- Closely following birding were day hiking and backpacking, growing 193 and 182 percent in participants, respectively, in less than twenty years.
- Snowmobiling increased 125 percent. Next were attending outdoor concerts, plays, and other events; walking for pleasure; camping in developed sites; canoeing or kayaking; downhill skiing; and swimming in natural waters (i.e., streams, lakes, and oceans).
- The most noticeable change by 2000 was growth in the proportion of population participating in outdoor activities.
- Also, growth in interest in nature study.



- Though the technology of outdoor equipment and clothing has evolved dramatically over the years, all of the activities popular in the 1950s, 1960s and 1970s are still popular.
- **However, many other key aspects of society and of outdoor recreation have been changing, not just the technology.**

The equipment used now is quite different, relative to the 1960s. The Nyman family portaging on the Superior National Forest in Minnesota in 1965. (Forest History Society Photo Archives)

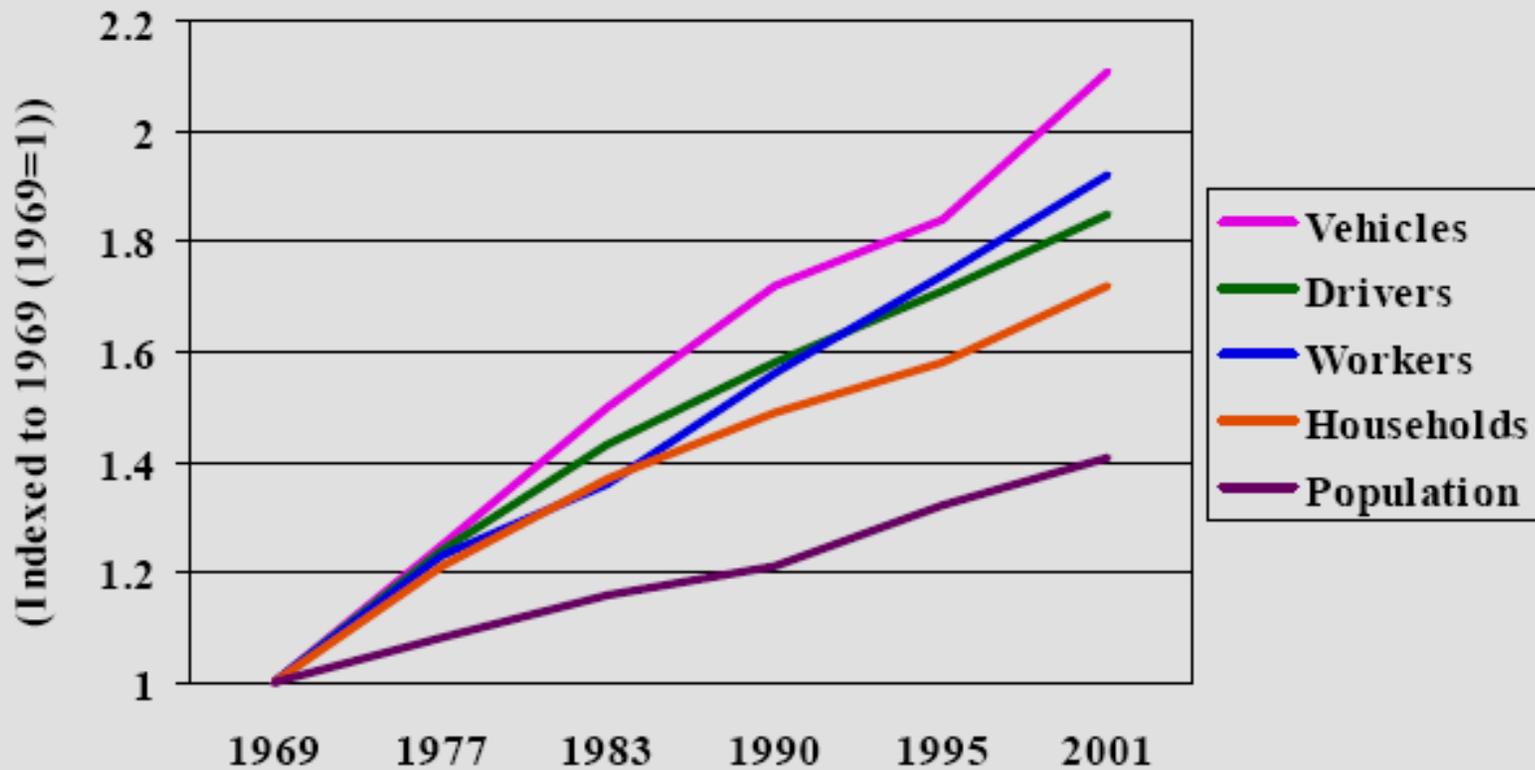


Photo source, Forest History Society

Some of the Drivers of change up to last year

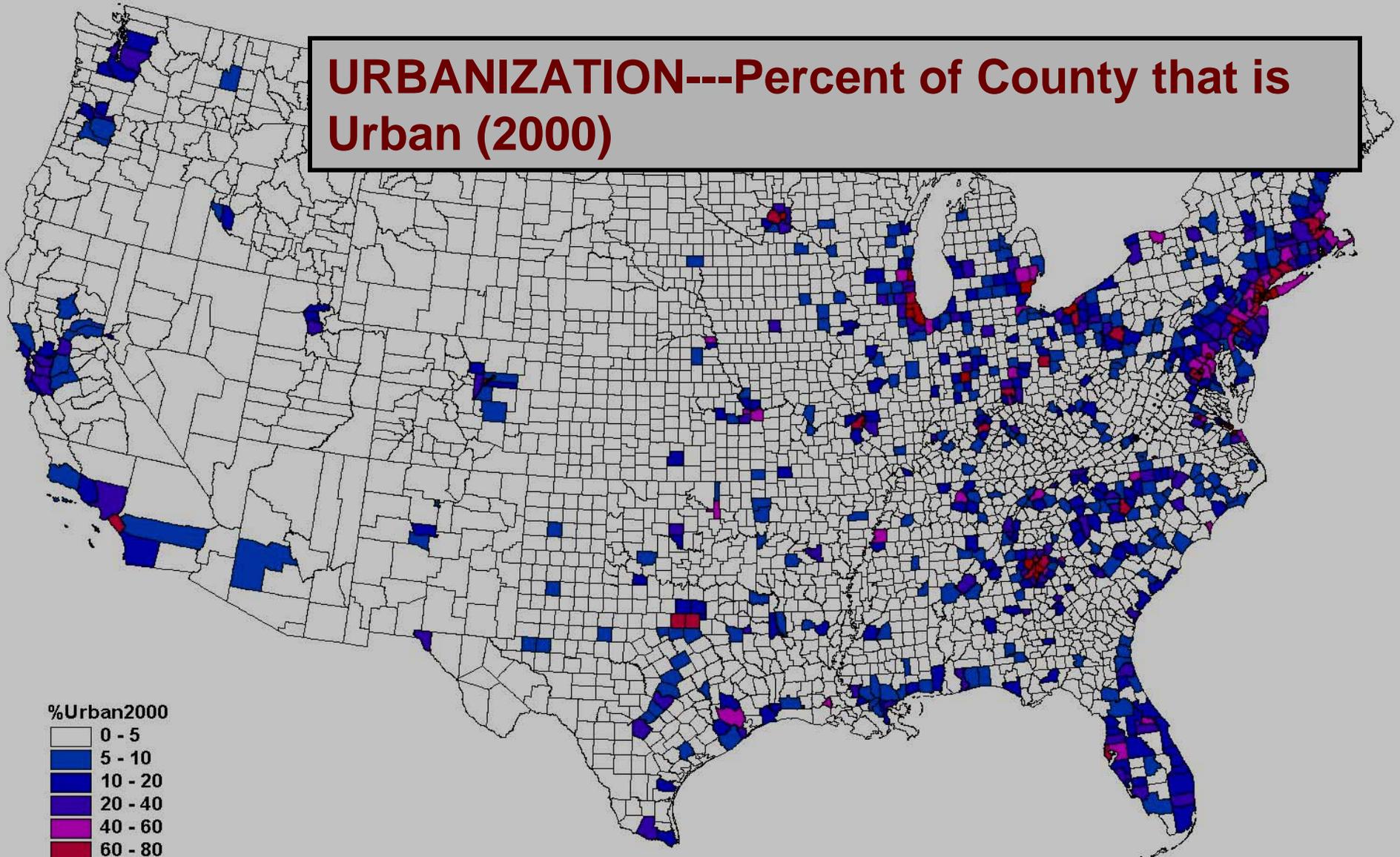
Changes in Summary Demographics
1969¹, 1977, 1983, 1990, 1995 NPTS, and 2001 NHTS

U. S. Department of Transportation





URBANIZATION---Percent of County that is Urban (2000)

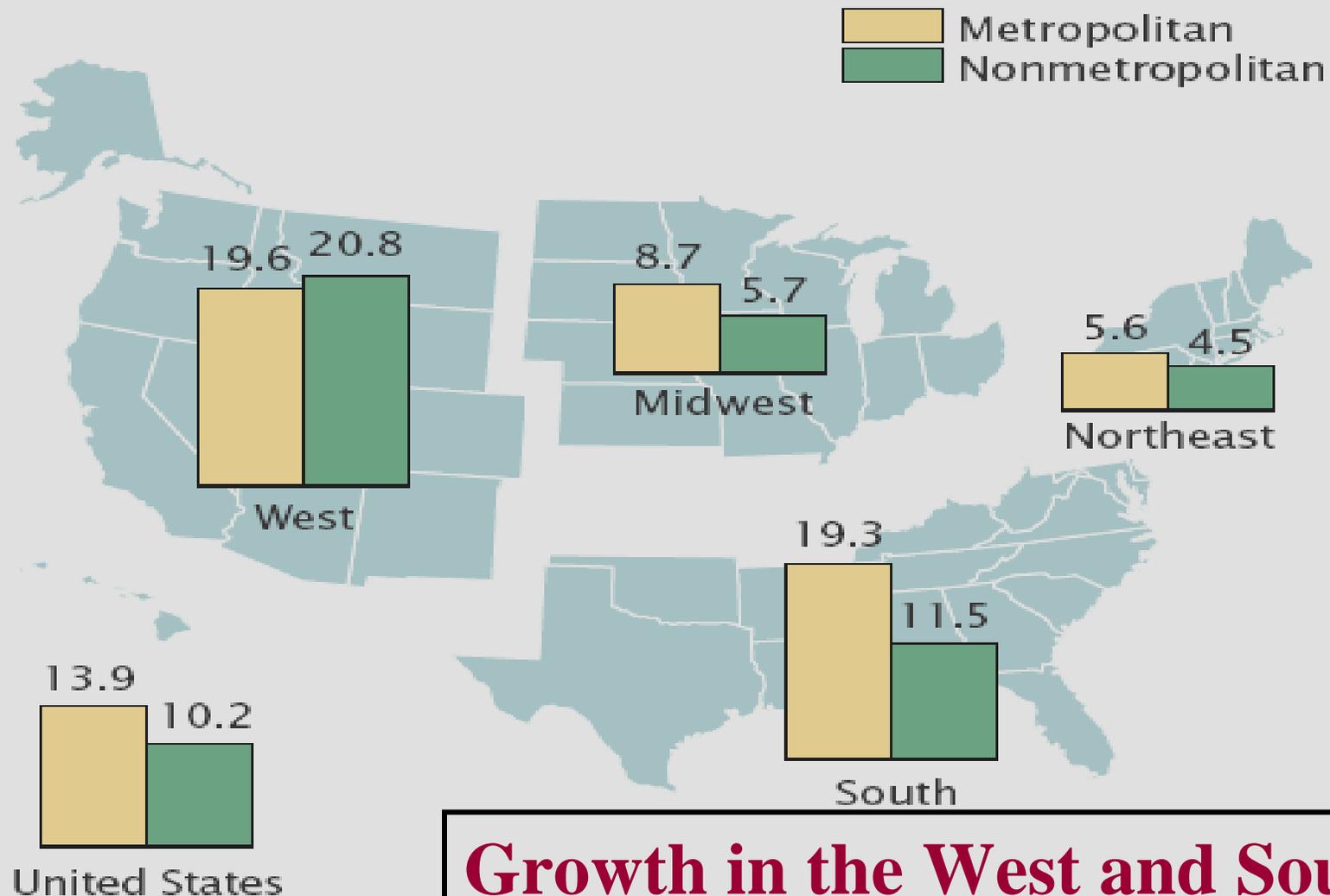


%Urban2000

White	0 - 5
Light Blue	5 - 10
Medium Blue	10 - 20
Dark Blue	20 - 40
Purple	40 - 60
Magenta	40 - 60
Red-Orange	60 - 80
Red	80 - 100

Urban = 500 persons per square mile

Percentage Change in Metropolitan and Nonmetropolitan Populations by Region: 1990 to 2000



Source: U.S. Census Bureau, Census 2000 and 1990 census.

Historic and Projected Population by Ethnicity

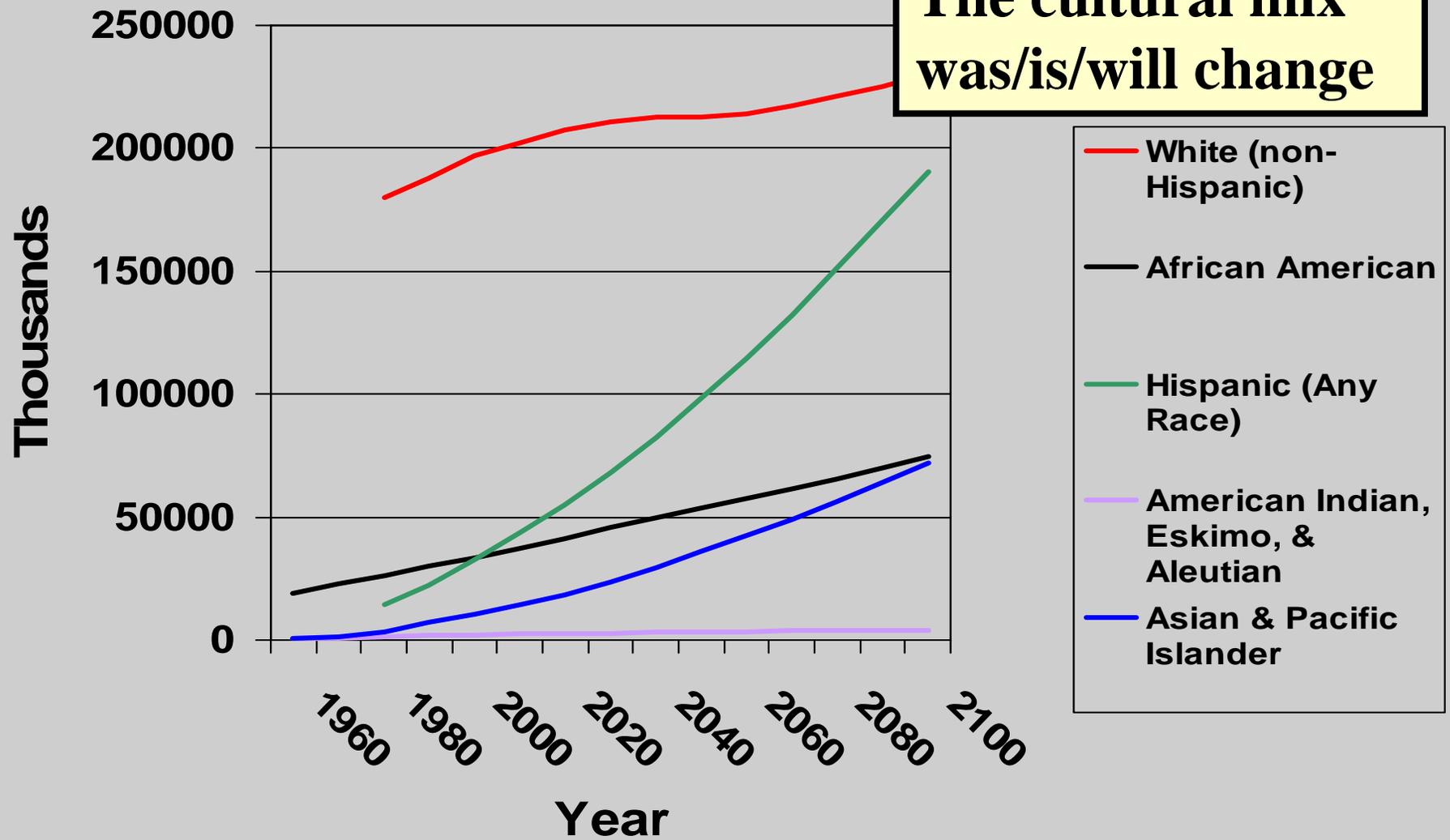
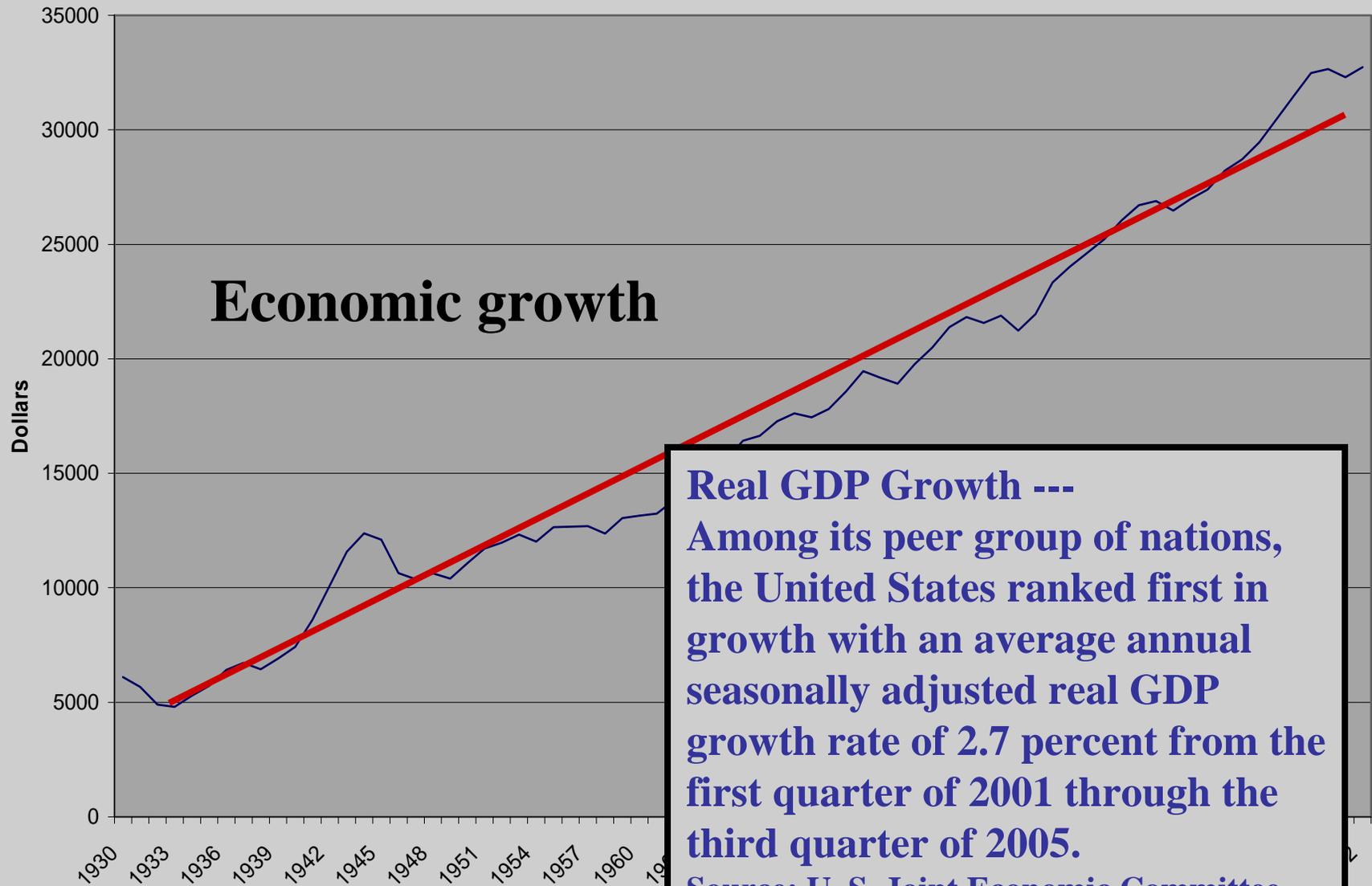
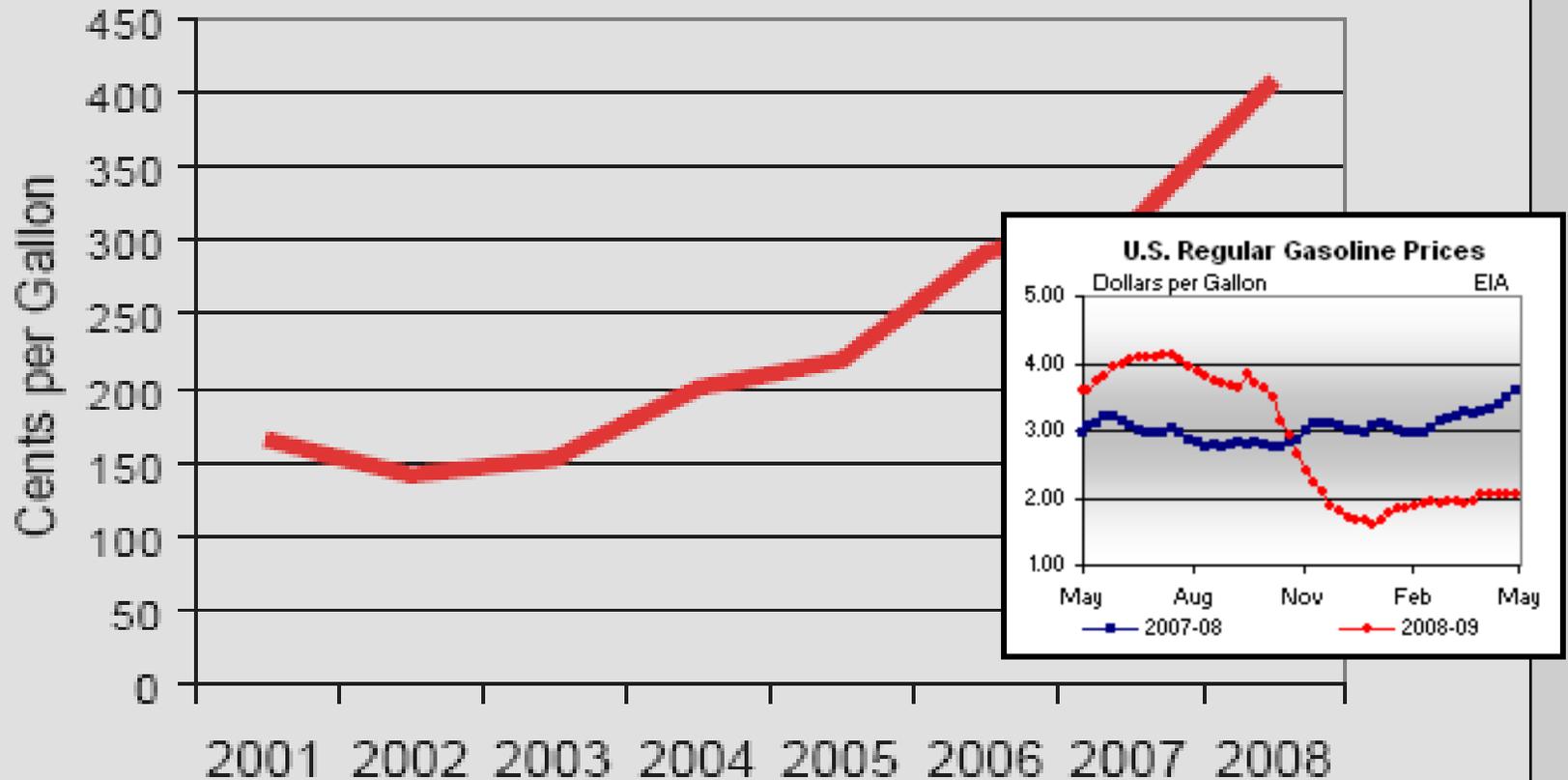


Figure 3. Real GDP Per Capita Over Time



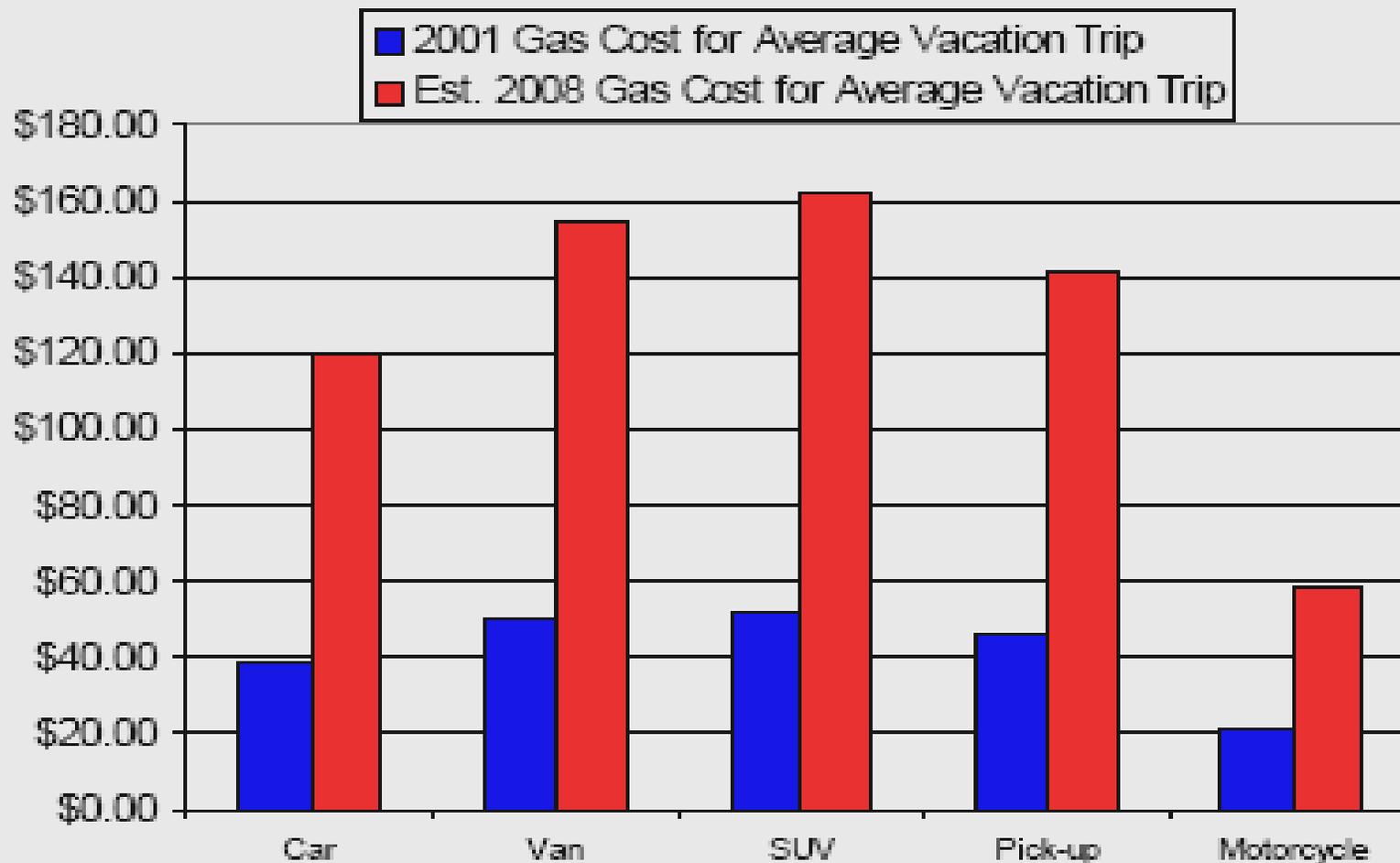
Average cost of a gallon of gasoline, all grades averaged, as of June 2008, was still rising



Source: Energy Information Agency historic tables

<http://tonot.eia.doe.gov> US All Grades All Formulations

Fuel Cost for Average Vacation Round Trip, 2001 – 2008

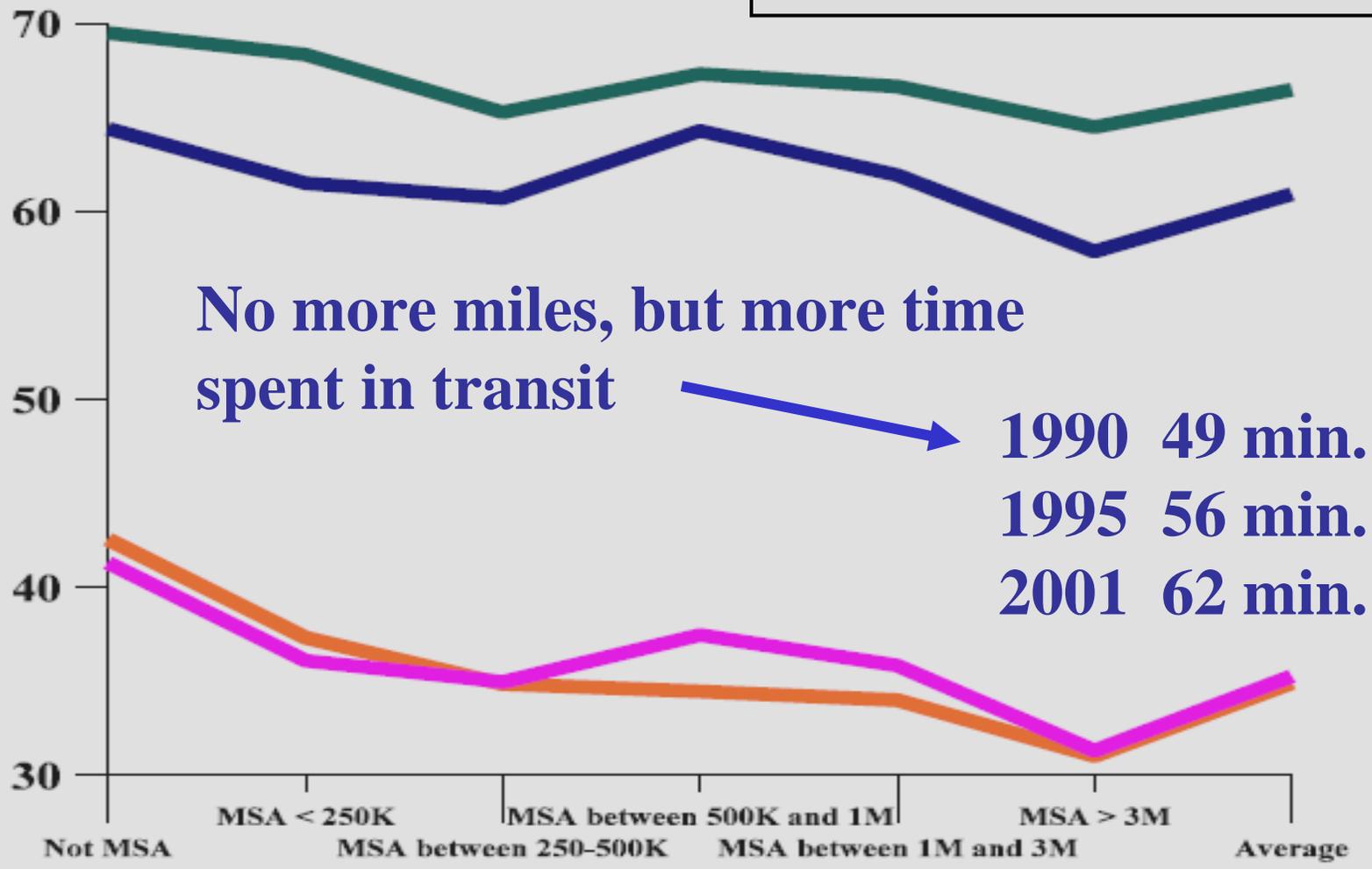


National Household Travel Survey--NHA

Website: <http://nhts.ornl.gov>

Average Time Spent in Vehicle and Miles Traveled
1995 NPTS and 2001 NHTS

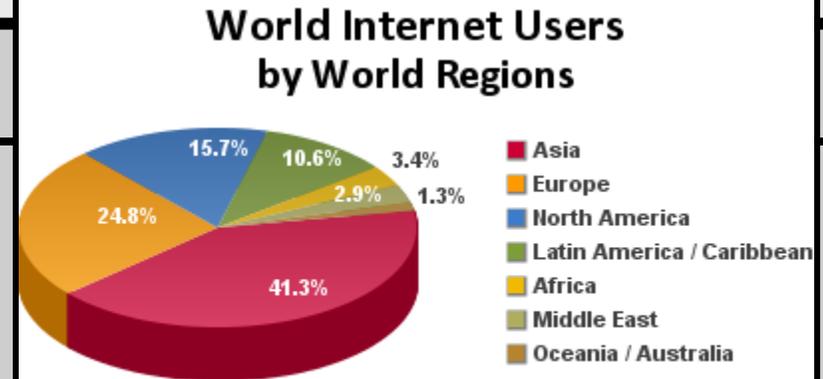
National Household Travel Survey



█ Time spent - 2001 █ Miles traveled - 2001
█ Time spent - 1995 █ Miles traveled - 1995

GROWTH OF INTERNET USERS WORLD-WIDE

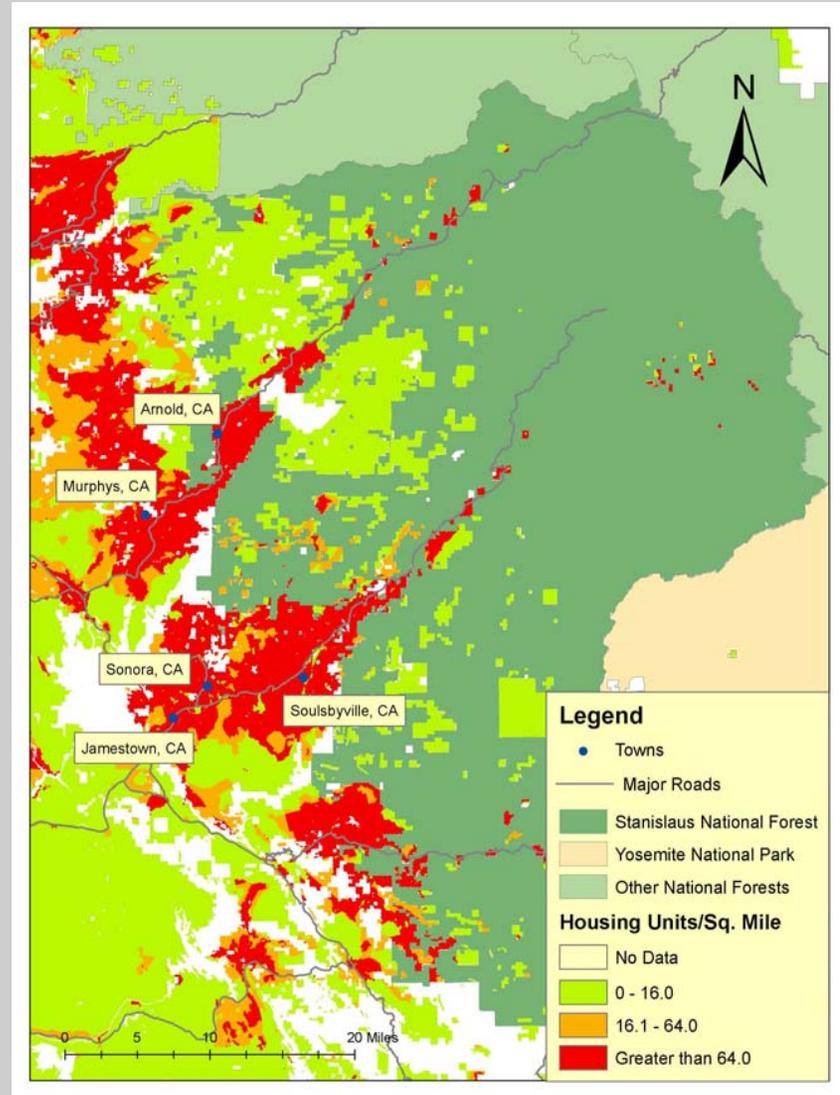
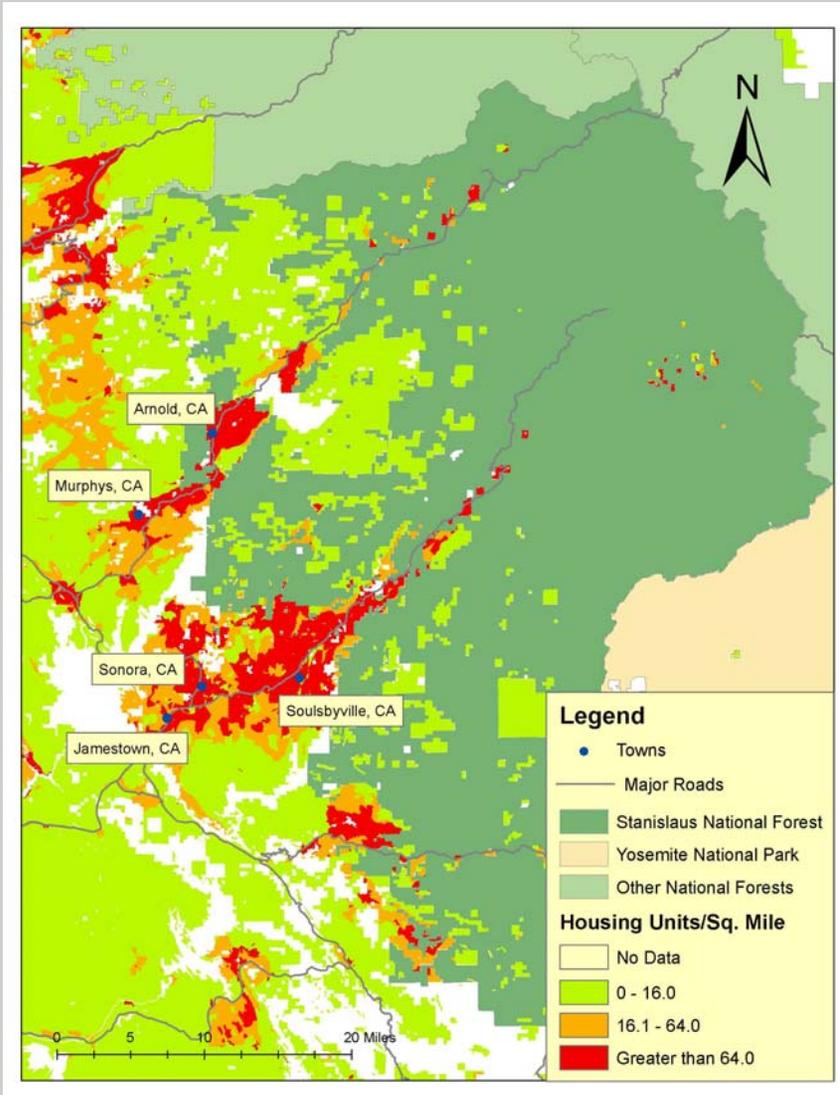
- Dec. 1995 16 Million
- Dec. 1997 70 Million
- Dec. 1999 248 Million
- Dec. 2000 451 Million
- Dec. 2003 719 Million
- April 2004 757 Million
- April 2005 934 Million
- Now, Approaching 1.6 Billion



Source: Internet World Stats - www.internetworldstats.com/stats.htm
1,574,313,184 Internet users for December 31, 2008
Copyright © 2009, Miniwatts Marketing Group

It is estimated that as many as 60% of internet users also play video games

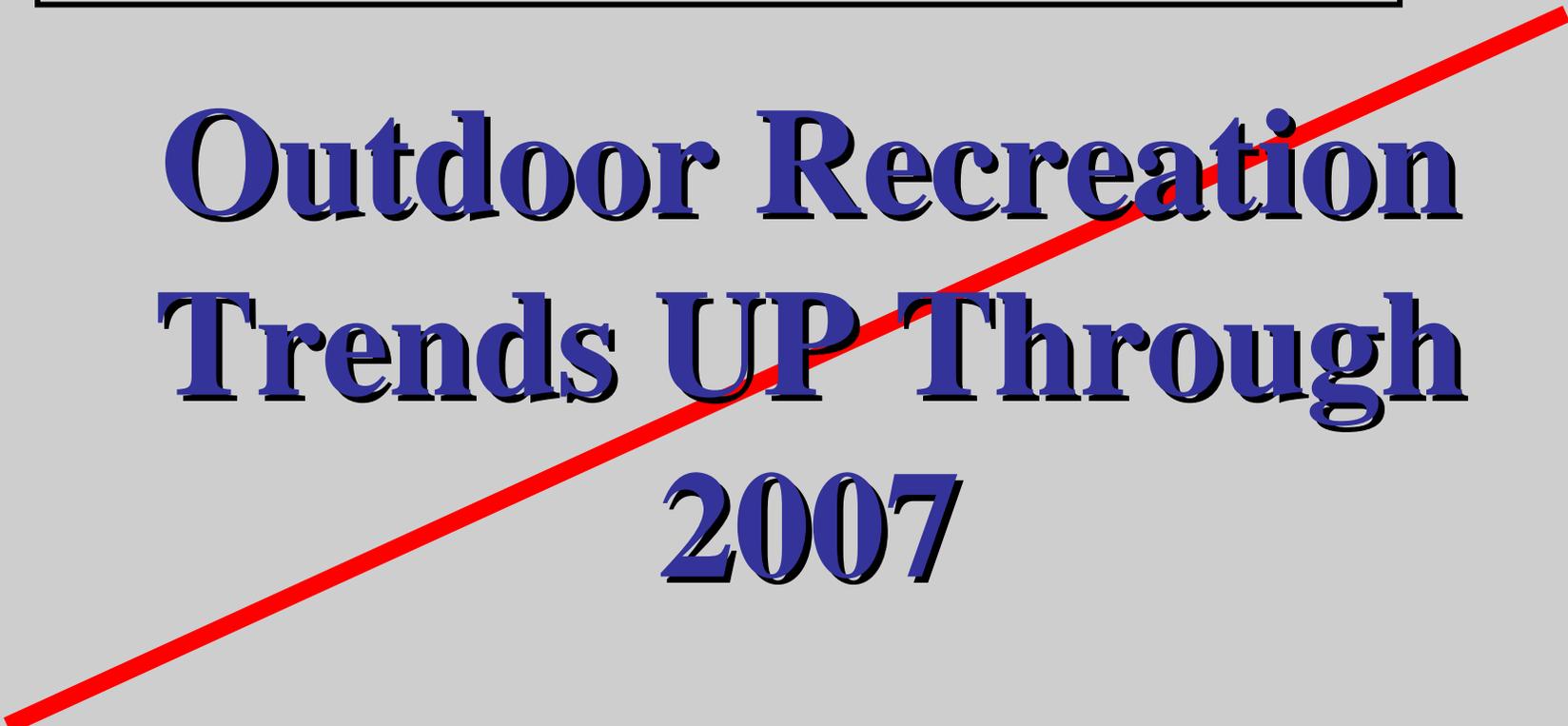
Approaching 1/4 of world population



Housing unit density around the Stanislaus National Forest, Year 2000 and 2030. Housing density data source: D. Theobald, 2005

Outdoor recreation is deeply rooted in the U. S., but is there a fundamental change underway?

Outdoor Recreation Trends UP Through 2007



Pre-recession and pre-2008 gas price surge



How did all the changes up through 2007 affect recreation participation?

Trends in outdoor recreation generally

- Between 2000 and early 2008, the total number of people who participated in one or more activities **grew by 4.4 percent**

- At the same time, the sum total number of days of participation increased from 67 billion to 84 billion, **approximately +25 percent**

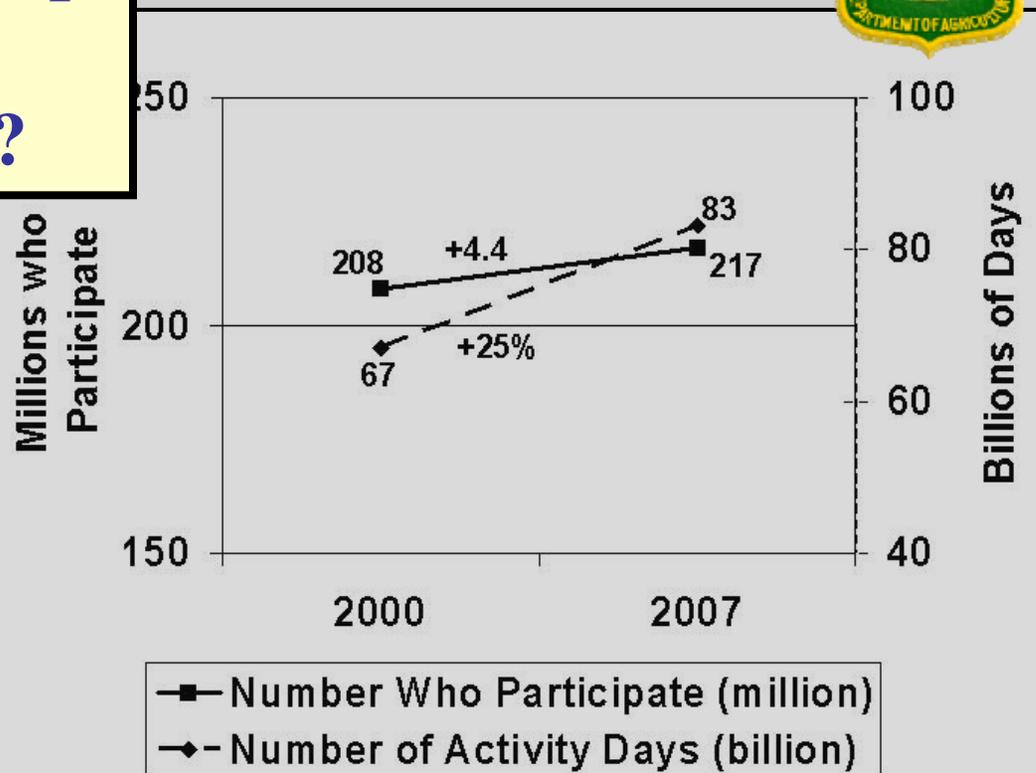


Figure 1.—Growth in number of people and number of activity days in 60 outdoor recreation activities in the United States, 2000–2007.

Source: National Survey on Recreation and the Environment

Trends through 2007 in nature-based outdoor recreation

- Growth in some near-home activities (e.g., wildlife watching or swimming); others remote (such as backpacking or climbing).
- Between 2000 and 2007, the total people participating in nature-based activities **grew by 3.1 percent**.
- Number of days of participation **grew about 32 percent**.
- Over all 50 nature-based activities, **per capita days** increased by more than 22 percent.

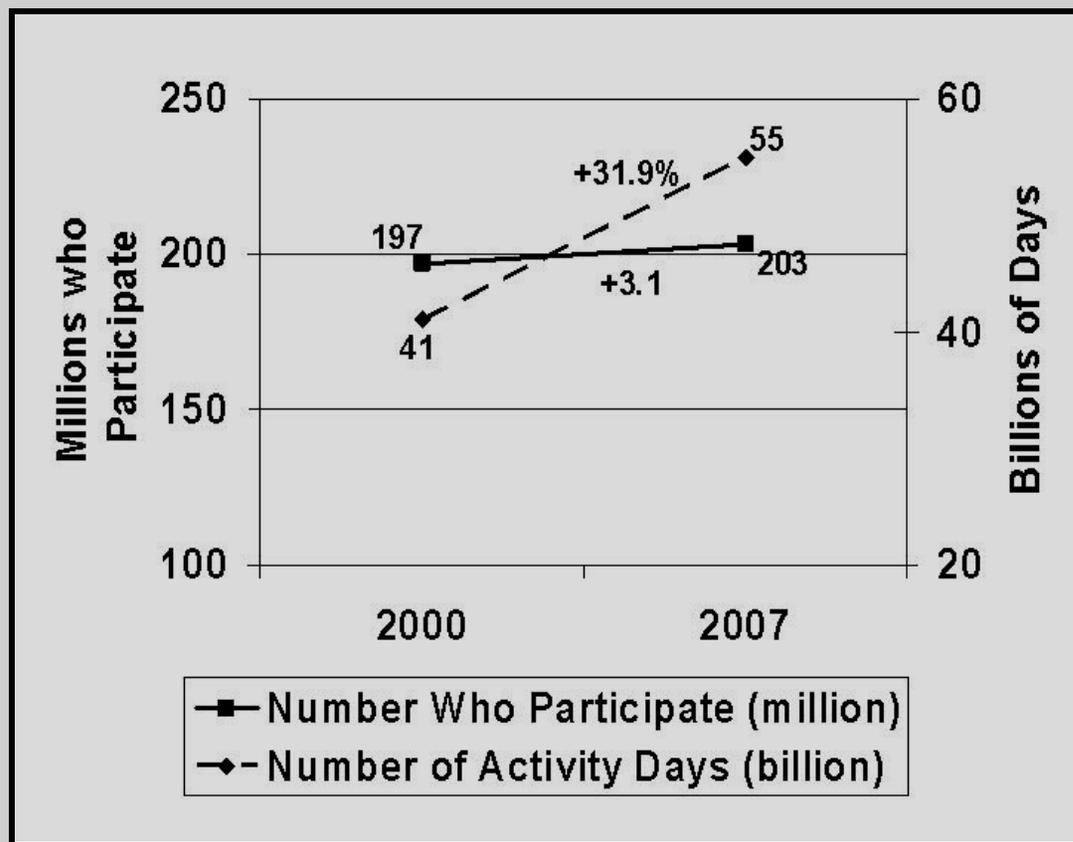


Figure 2.—Growth in number of people and number of participation days in 50 nature-based outdoor recreation activities in the United States, 2000–2007.



Interest in visiting, viewing, photographing **nature** was growing

<i>Fastest Growing Nature-Based Activities</i>	<i>Total participants (millions), 2007</i>	<i>Percentage change in participants, 2000–2007</i>	<i>Total days of participation (billions), 2007</i>	<i>Percentage change in total days, 2000–2007</i>
Viewing or photographing flowers and trees	118.4	25.8	10.2	77.8
Viewing or photographing natural scenery	145.5	14.1	11.5	60.5
Driving off-road	44.2	18.6	1.3	56.1
Viewing or photographing other wildlife	114.8	21.3	5.3	46.9
Viewing or photographing birds	81.1	19.3	8.0	37.6
Kayaking	12.5	63.1	0.1	29.4
Visiting water (other than ocean beach)	55.5	1.6	1.1	28.1
Backpacking	22.1	-0.6	0.3	24.0
Snowboarding	11.3	7.3	0.1	23.9
Rock climbing	8.7	-5.5	0.1	23.8
Visiting nature centers, etc.	127.4	5.0	1.0	23.2
Big-game hunting	20.2	12.8	0.3	21.2
Mountain climbing	11.8	-12.5	0.1	20.5
Visiting ocean beach	96.0	10.5	1.4	16.3
Sightseeing	113.2	4.1	2.3	14.0
Visiting wilderness	70.6	3.0	1.1	12.8

Driving ATVs, off-road motorcycles, other OHVs growing rapidly

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Technical, risk-oriented activities showing growth, mostly in dedication

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Activity Mix is Changing

- A few of the nature-based activities experienced **decreases in both** the number of people who participated and total days of participation
- Primitive camping (not in developed campgrounds), backpacking, and mountain climbing showed **decreases in the number of people who participated, but increases in the number of days of participation**
- Visiting prehistoric sites, saltwater fishing, and snorkeling showed **increases in number of people who participated, but decreases in total days**
- For a sizable number of nature-based activities, however, **both** the number of people participating and the summed days of participation increased
 - **Net effect, growth of nature-based recreation**

Highlighting A few activities--**Decreasing**

Δ = Change 2000 - 2007

<u>Activity</u>	<u>Percent Δ Participants</u>	<u>Percent Δ Days</u>
Picnicking	-1.4	-17.2
Visiting Historic Sites	-4.5	-15.2
Day Hiking	6.8	-20.9
Visiting Prehistoric sites	2.4	-7.3
Mountain Biking	-8.0	-32.7
Cold Water Fishing	-2.1	-7.0
Canoeing	2.3	-17.9
Rafting	-16.8	-1.0
Downhill Skiing	-14.8	-15.7

Highlighting a few other activities--**Increasing**

Δ = Change 2000 - 2007

<u>Activity</u>	<u>Percent Δ Participants</u>	<u>Percent Δ Days</u>
Walking	9.6	13.9
Family gatherings outdoors	4.2	13.7
Swimming (not pools)	4.0	2.2
Gathering mushrooms/berries	16.1	1.9
Developed Camping	2.7	9.3
Warmwater fishing	7.3	5.6

Within Nature-Based Recreation lays *Forest Recreation*

Top 7 activities

Millions of activity days

Walk for pleasure	7,493.3
View/photograph natural scenery	6,170.6
View/photograph wildflowers, trees, other wild plants species	4,858.9
View/photograph birds	3,738.3
View/photograph other wildlife	3,086.8
Day hiking on trails	1,234.8
Visit a wilderness/primitive area	947.6

Nearly 60 percent of nature-based recreation occurs in forested settings--- self reported

Forest Recreation Activity	Number of Activity Days	% Public Forest	% in Urban Forests
Walk for pleasure	7,493.303	53.8	44.5
View/photograph natural scenery	6,170.597	61.9	31.8
View/photograph wildflowers, trees, etc.	4,858.941	55.4	36.3
View/photograph birds	3,738.274	51.3	37.6
View/photograph other wildlife	3,086.848	57.7	32.2
Day hiking	1,234.823	76.2	34.0
Visit a wilderness or primitive area	947.559	76.4	24.6
Off-highway driving	837.541	50.4	23.2
Family gathering	805.291	55.9	43.5
Visit nature centers, etc.	683.850	77.6	45.2
Gather mushrooms, berries, etc.	623.372	47.9	32.3
Mountain biking	463.324	60.2	32.1
Canoeing	455.942	68.4	44.4
Developed camping	355.966	72.8	21.3
Big game hunting	279.781	45.7	16.5
Primitive camping	211.448	75.8	21.4
Backpacking	198.787	78.5	22.1
Visit historic Sites	182.755	60.0	39.1
Horseback riding on trails	177.453	50.8	34.4
Small Game hunting	161.488	46.8	17.4
Visit prehistoric/ archeological sites	138.932	70.0	41.6
Snowmobiling	62.111	55.1	27.4
Mountain climbing	57.091	78.6	20.5
Cross country skiing	41.874	60.5	33.7
Rock climbing	34.088	68.8	26.9
Snowshoeing	19.938	60.2	27.6

Forest Recreation

Public forest lands are important for recreation

- Almost 44 percent of the 751 million acres of forest in the U. S. is publicly owned and managed and is pretty much open to everyone
- Forest-based recreation activities where 1/2 or more occurs on public lands include visiting wilderness, day hiking, visiting nature centers, and backpacking
- Forest-based recreation activities where more than 1/2 occurs on private lands include, for example, small-game hunting, horseback riding, off-road driving, and gathering mushrooms and berries

• Roughly 60 percent of forest recreation occurs on public lands, and of course the other 40 percent is on private forest lands

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Visitation to Public Lands Level to Increasing, except NF's

- The paper back in February in the PNAS said that **public land visitation was in steep decline. But, that was per-capita, not total.**
- Agency data showed state park, national park, and national wildlife refuge visitation **stable or increasing** since the 90s.
- State park visitation in 2007 **rose** back above the former level reported in 2001 (a 0.7% increase) (National Association of State Park Directors, 2007). 2008 numbers coming.
- National Park visitation had been **stable** since 2001, but in 2007, visitation rose by almost three million. 2008 numbers coming.
- National wildlife refuge visitation has **grown** from 33 million in 1998 to over 40 million in 2007, growth of 21 percent
- The NF trend not available earlier, but now shows **-13% 2004 - 2007**

Year	Millions of Visits
1975	471
1985	660
1995	746
2000	767
2001	735
2003	735
2005	715
2006	711
2007	740

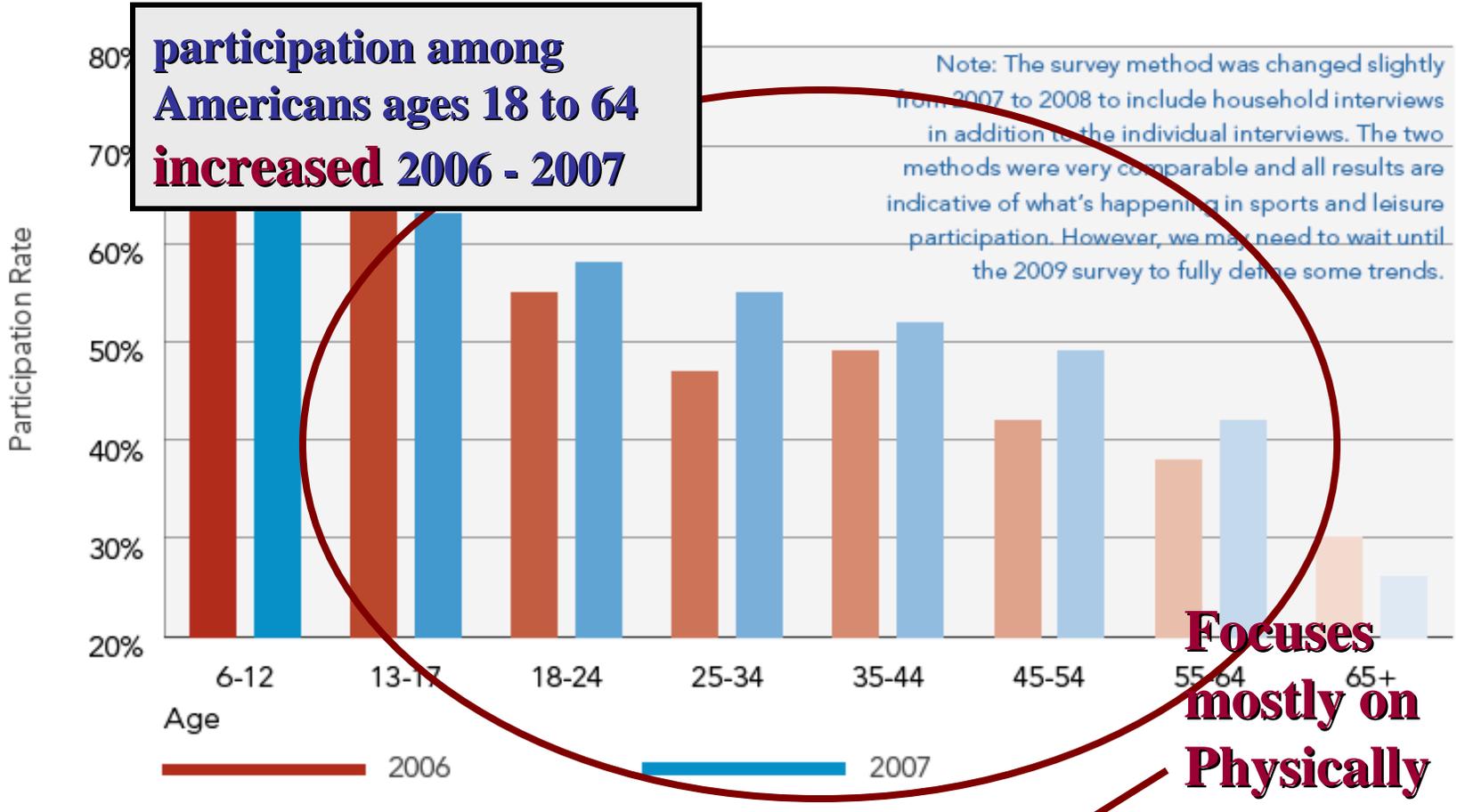
**State
Park
Trend**



Any Validation out there?



Participation in Outdoor Activities by Age
A 2006 and 2007 Comparison



participation among Americans ages 18 to 64 increased 2006 - 2007

Focuses mostly on Physically Challenging

Measured outdoor activities include: Backpacking, BMX Bicycling, Mountain Bicycling, Road Bicycling, Bird Watching Outdoors, Camping, RV Camping, Canoeing, Sport Climbing, Bouldering, Indoor Climbing, Ice Climbing, Traditional Climbing, Mountaineering, Fly Fishing, Freshwater Fishing, Saltwater Fishing, Hiking, Hunting, Kayaking, Whitewater Kayaking, Adventure Racing, Triathlon, Rafting, Running/Jogging, Skateboarding, Trail Running, Wildlife Viewing, Downhill Skiing, Telemark Skiing, Cross-Country Skiing, Snowboarding, Snowshoeing, Windsurfing, Sailing, Scuba Diving, Snorkeling, Surfing and Wake Boarding.

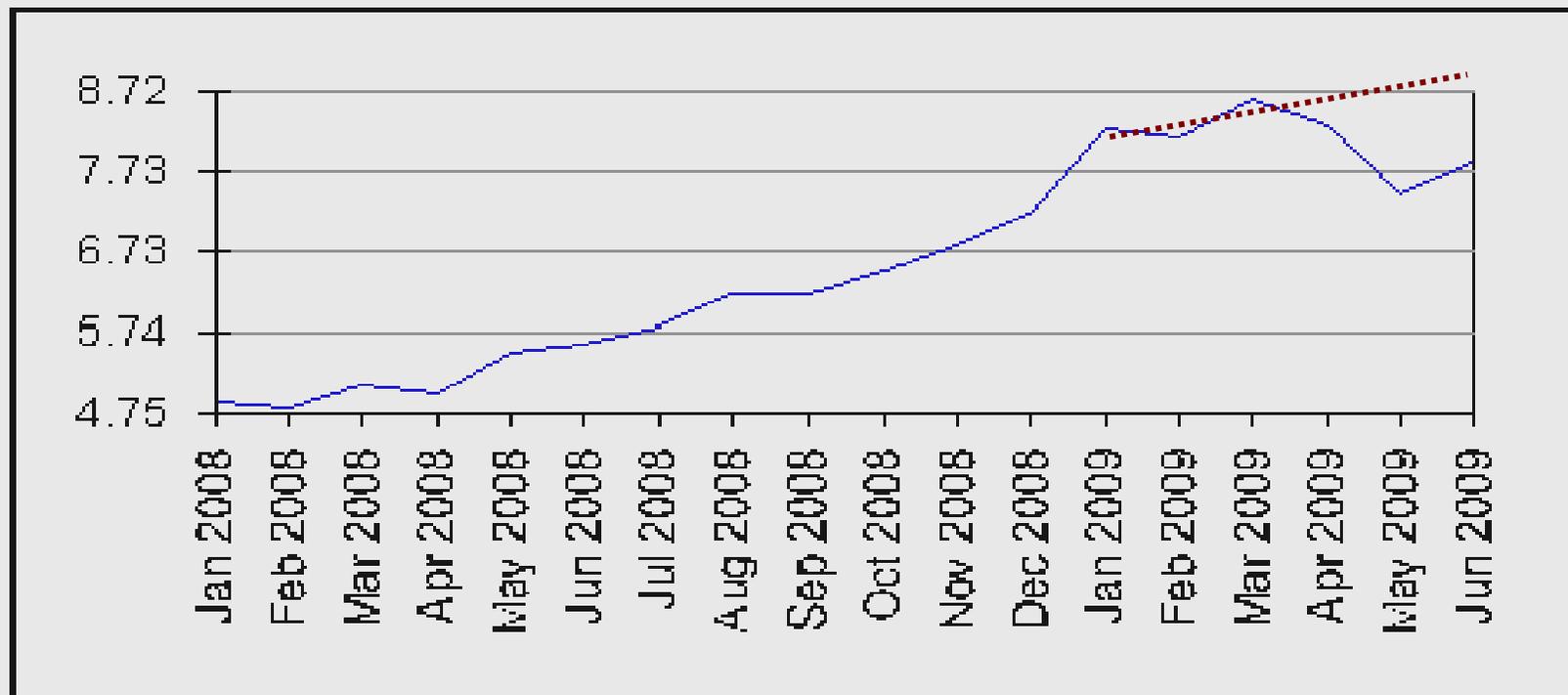
BUT, What happens to Recreation Trends when we add data from 2008 to early 2009---vast changes in the drivers of demand?

- **The economy---recession actually began Jan. 2007 (recession = reduced growth in real GDP in 2 successive quarters)**
- **Gasoline (doubled over price in 2004)**
- **Climate change (now widely evident)**
- **Etc.**

Marketvector.com

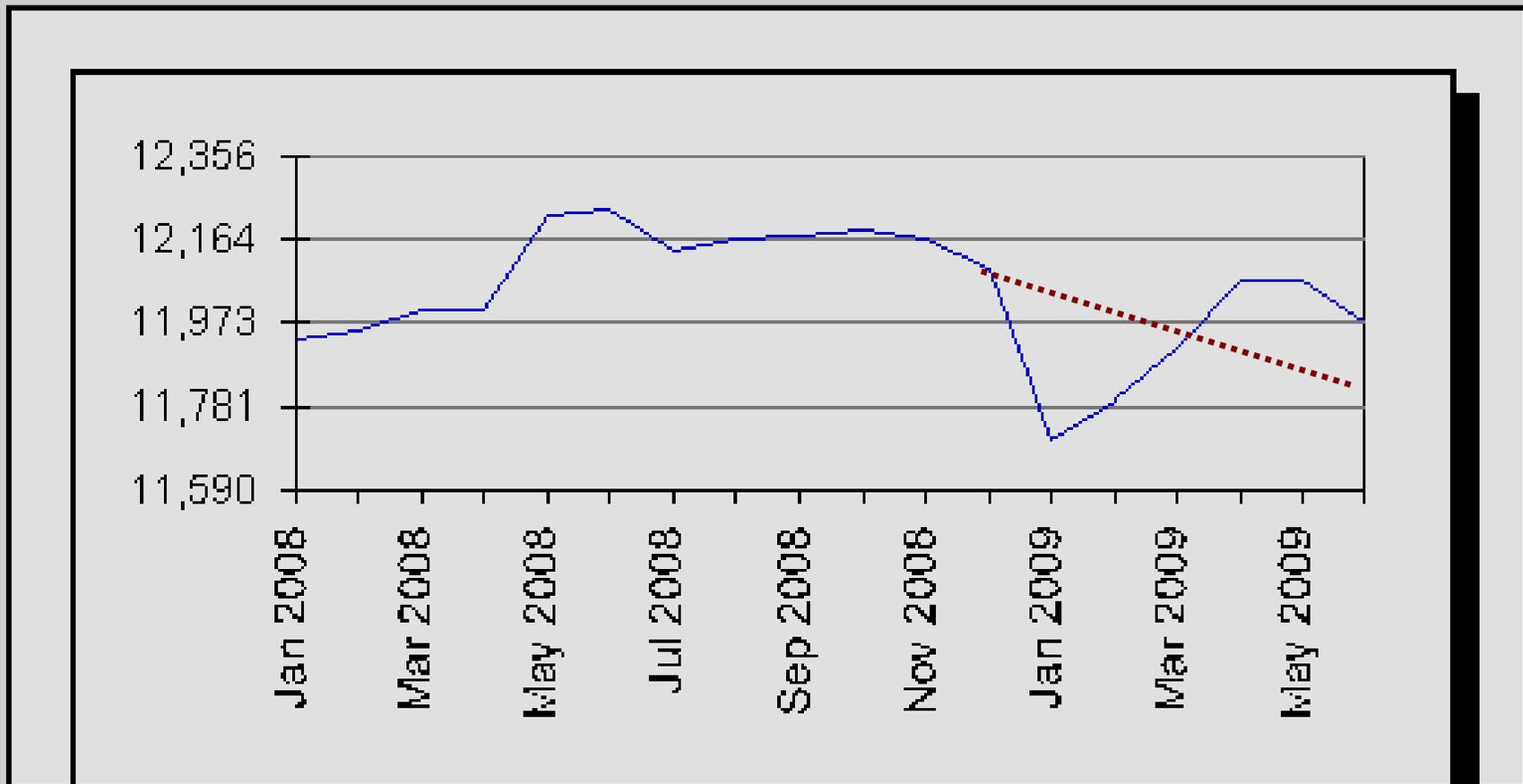
Straight line extension

US Unemployment Rate---Past Present and Future

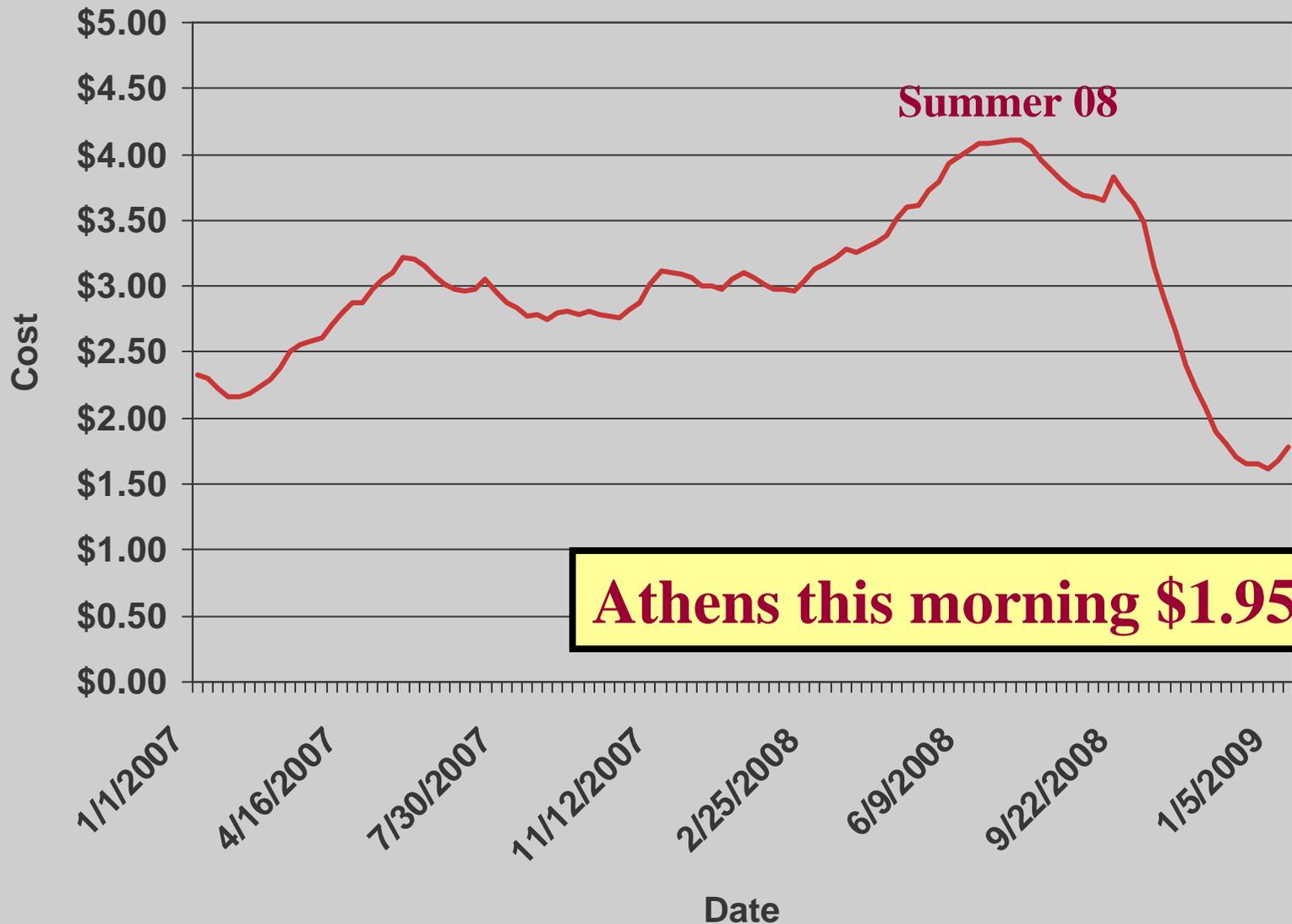


Marketvector.com

US Personal Income---Past Present and Future



Average Price of Gasoline



Athens this morning \$1.95

Frost-Free Days Are Increasing

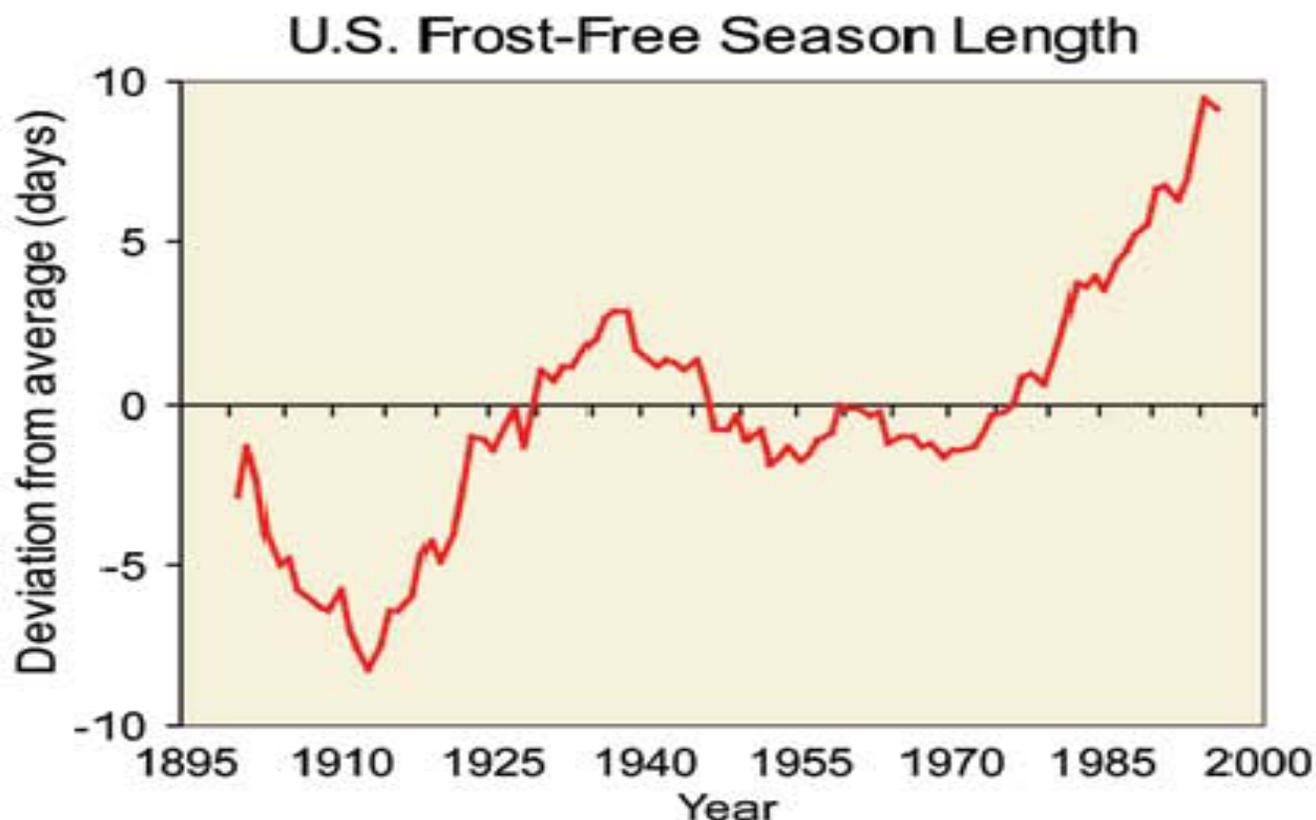
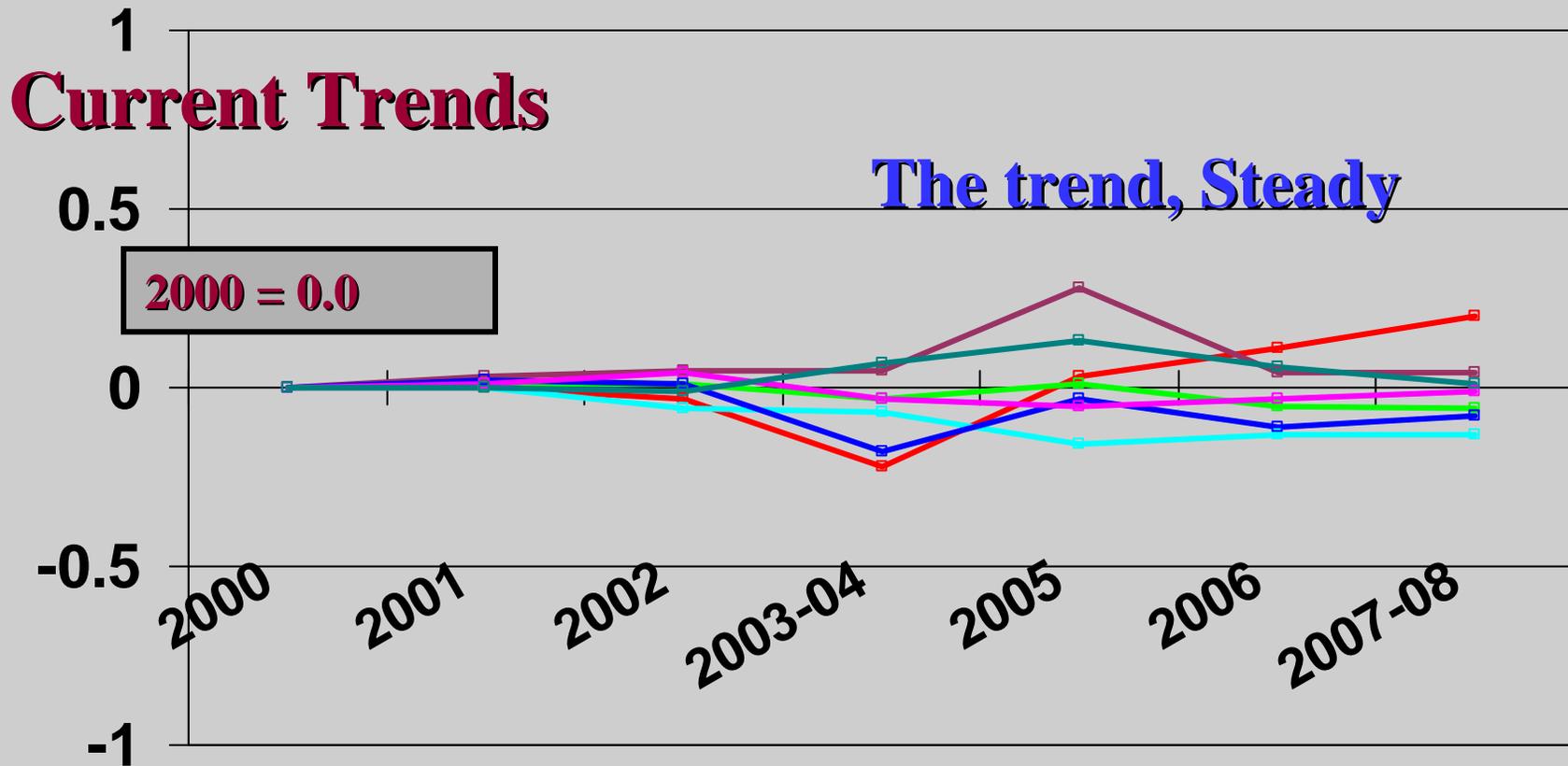


Figure 2.4 Change in the length of the frost-free season averaged over the United States (from Kunkel *et al.*, 2003). The frost-free season is at least ten days longer on average than the long-term average.

SO, What does happen to Recreation Trends when we add data from 2008 to early 2009?

- **The economy---recession actually began Jan. 2007 (recession = reduced growth in real GDP in 2 successive quarters)**
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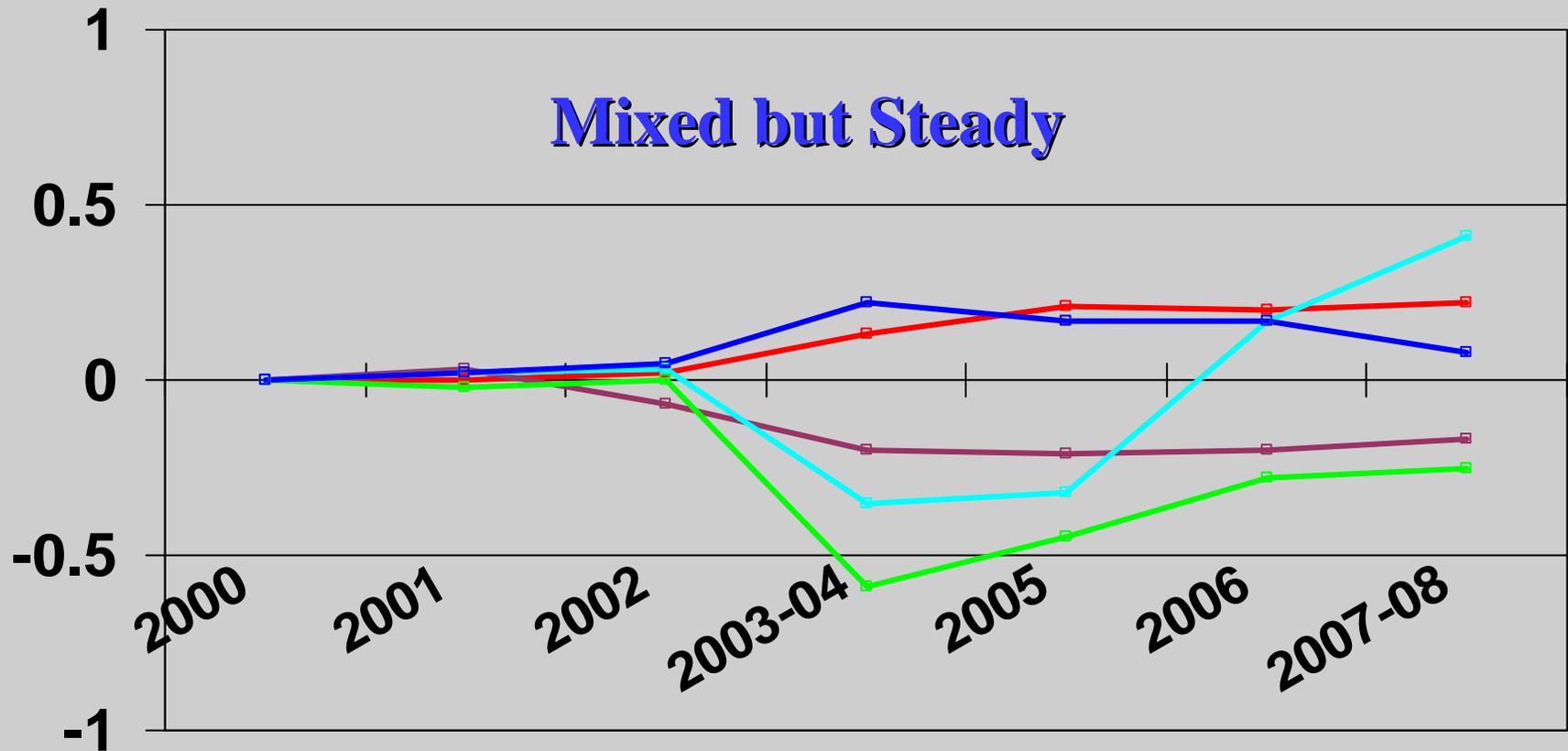
Total annual recreation activity days, moving 3-year averages



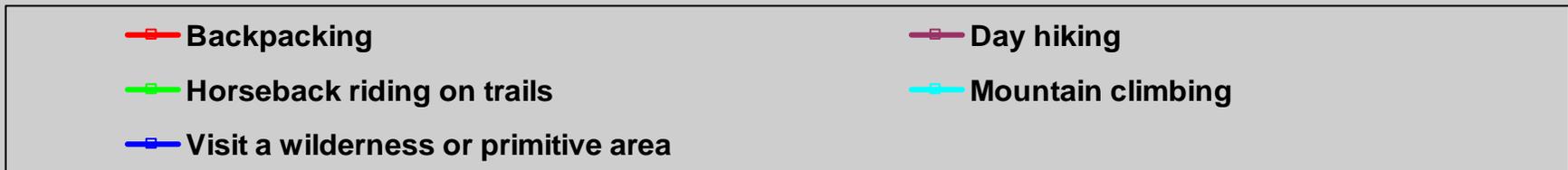
Hunting and Fishing



Total annual recreation activity days, moving 3-year averages

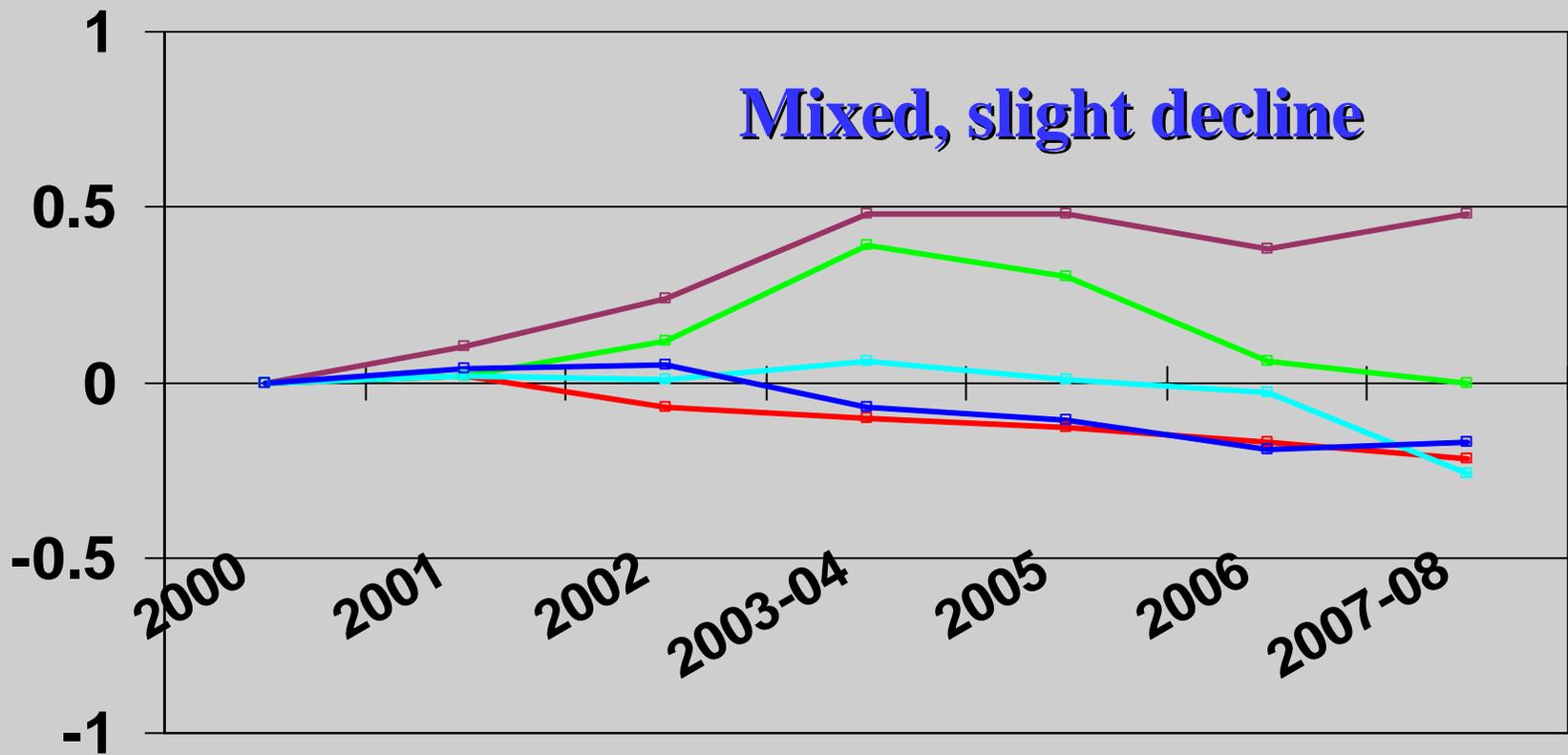


Backcountry Activities



NSRE---National Survey on Recreation and the Environment

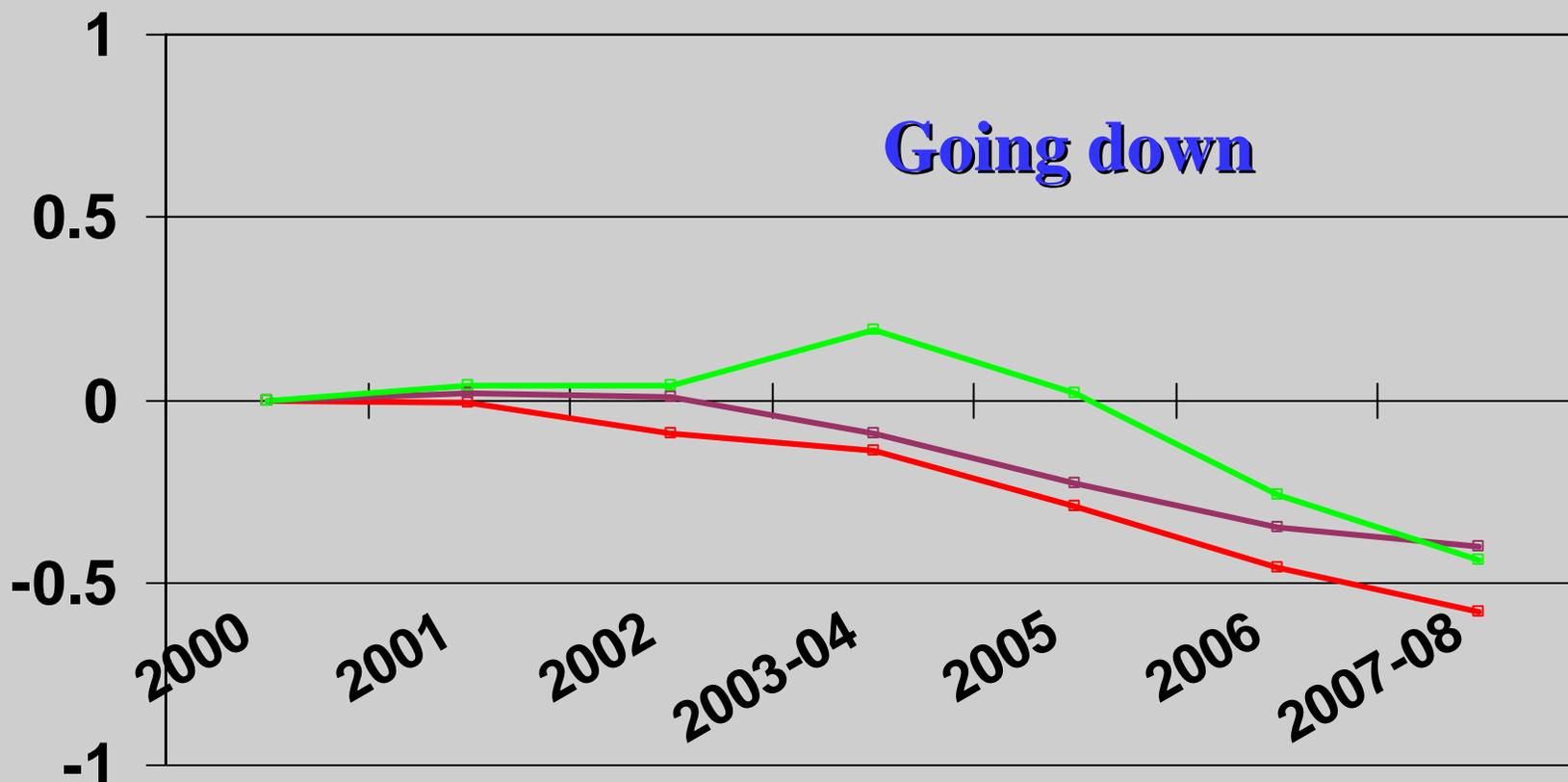
Total annual recreation activity days, moving 3-year averages



Non-Motor Boating Activities



Total annual recreation activity days, moving 3-year averages



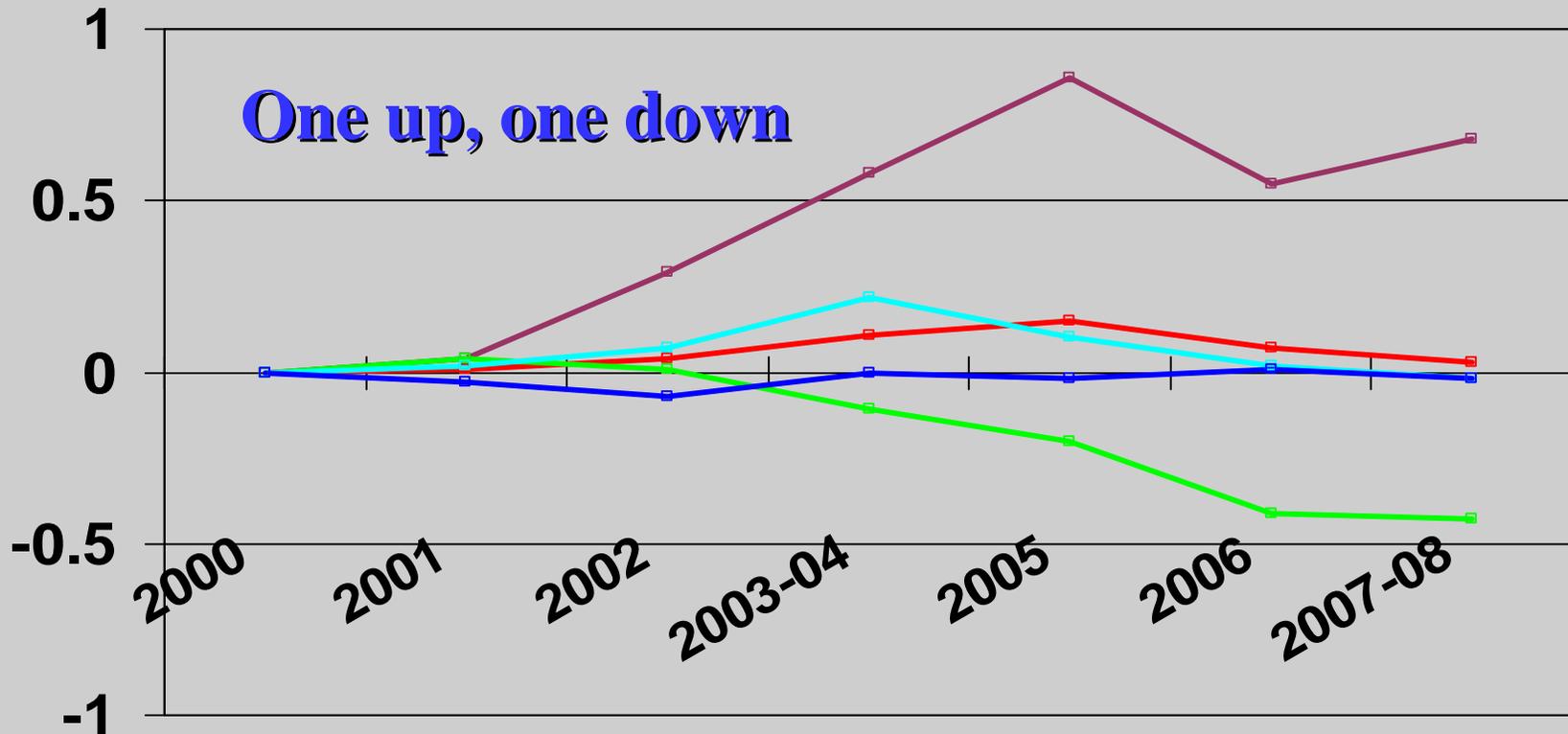
Going down

Snow Skiing and Boarding

— Cross country skiing — Downhill skiing — Snowboarding

NSRE – National Survey on Recreation and the Environment

Total annual recreation activity days, moving 3-year averages

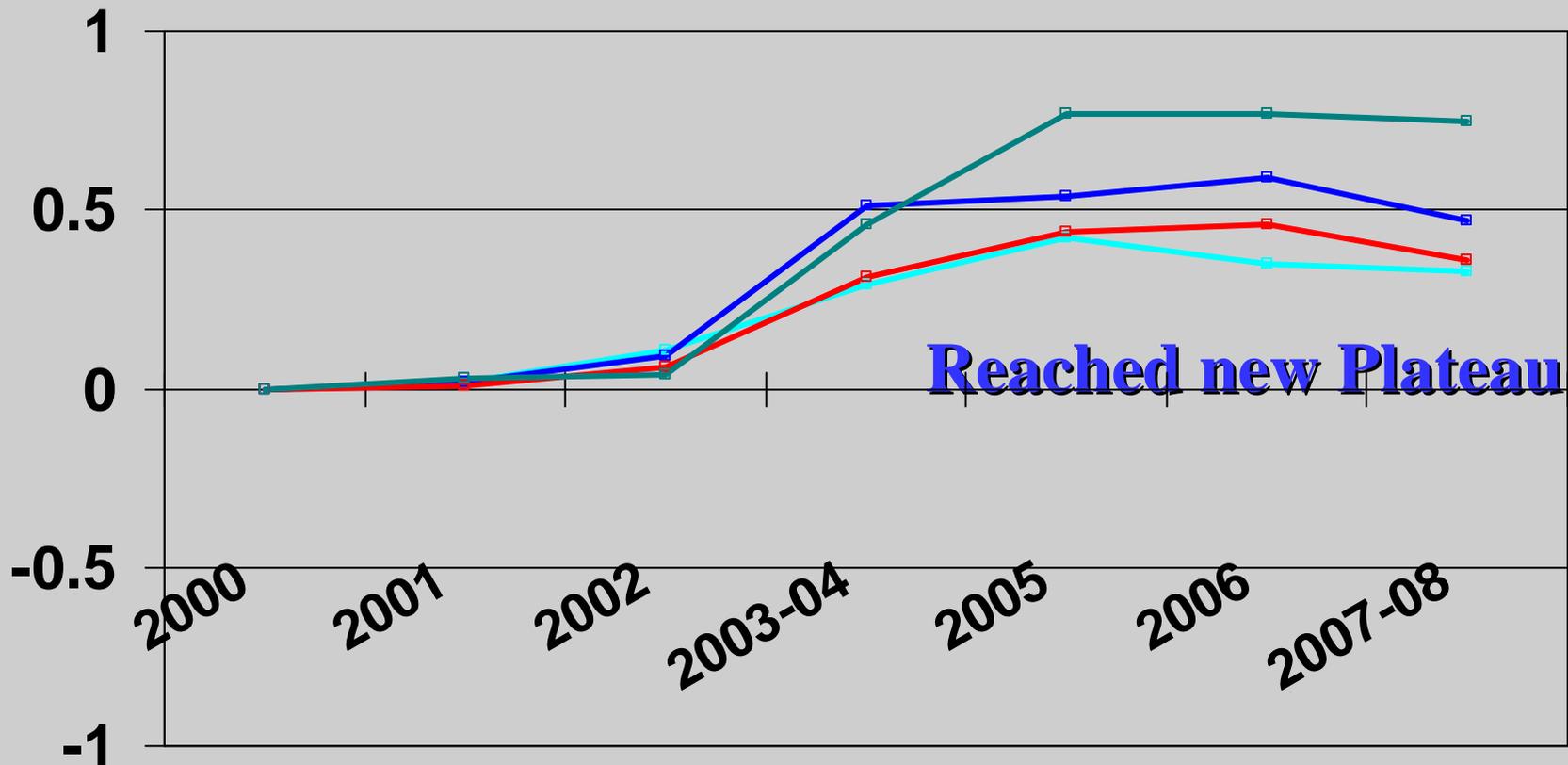


Motorized Activities



NSRE – National Survey on Recreation and the Environment

Total annual recreation activity days, moving 3-year averages

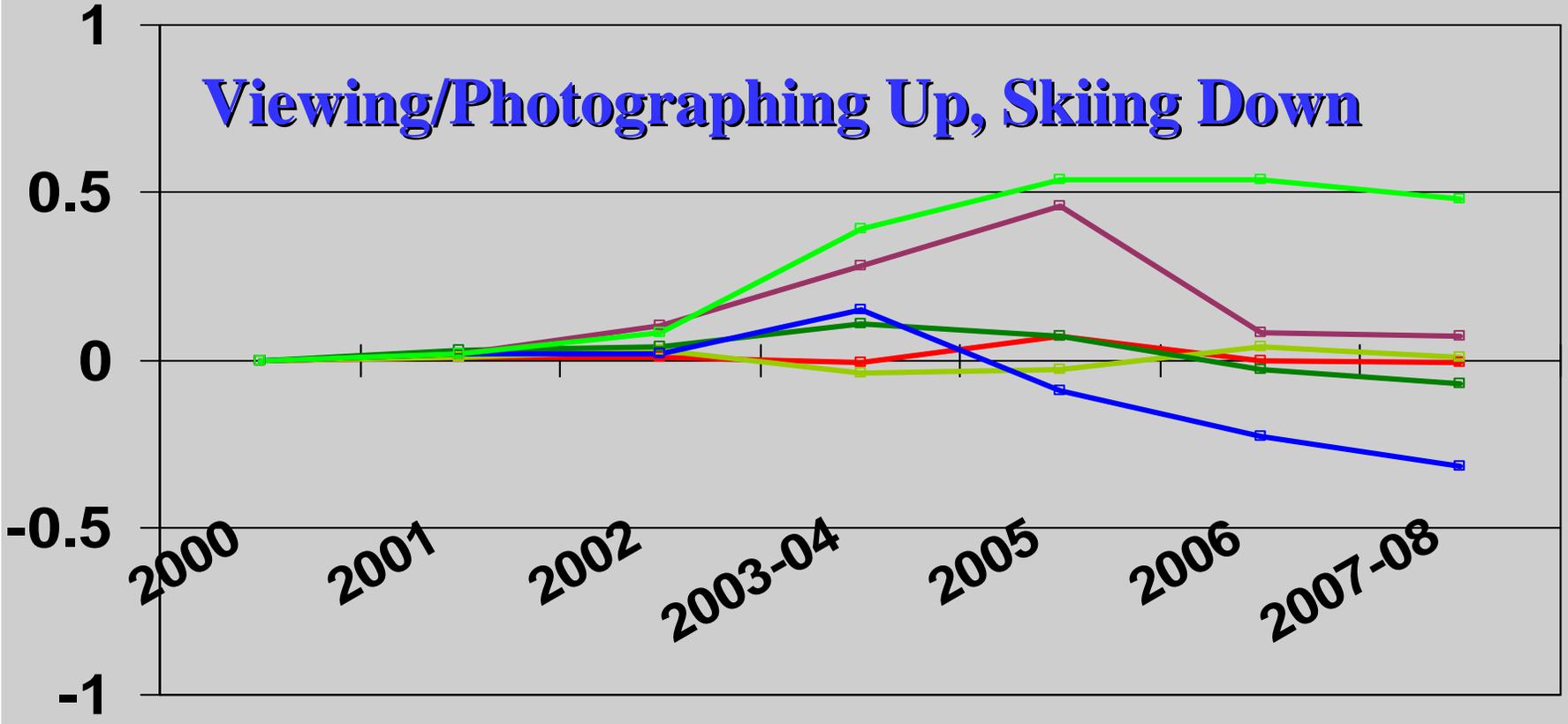


Viewing/Photographing Nature

- View/photograph birds
- View/photograph natural scenery
- View/photograph other wildlife
- View/photograph wildflowers, trees, etc.

NSRE – National Survey on Recreation and the Environment

Total annual recreation activity days, moving 3-year averages



Indexing for Groupings of Activities



Do we know what the trend is, or will be?

The future is uncertain.

•Some dramatic long-term changes are underway

•Population

•Migration

•Climate change

•Technology

•Land development

•Culture

•Change in what KIDS do

A Preliminary Look at the 2008 NSRE Kids Survey

H. Ken Cordell
Carter J. Betz
Gary T. Green

National Survey on Recreation and the Environment



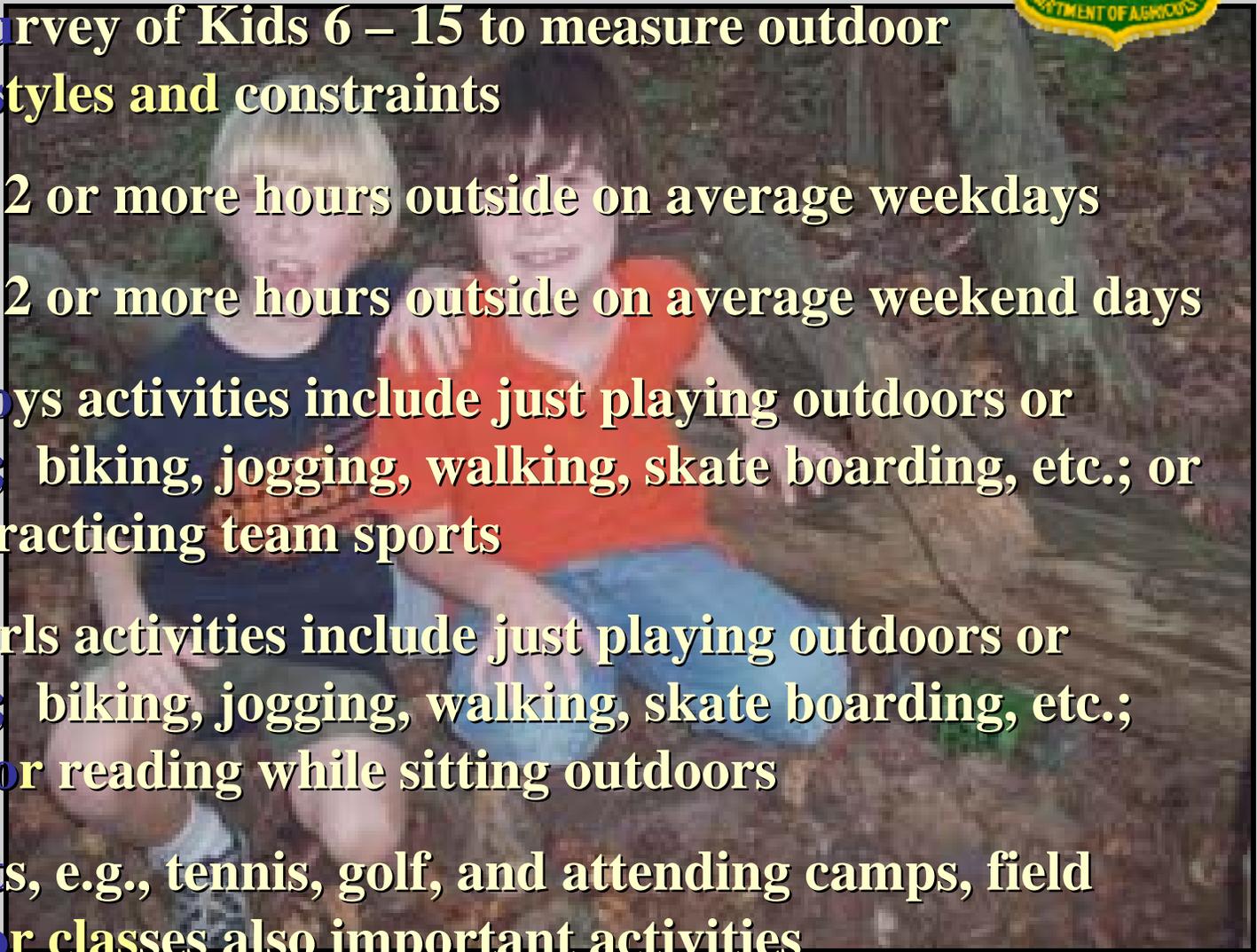
USDA Forest Service
Southern Research Station
Athens, Georgia

National Kids Survey

National Kids Survey



- **On-going survey of Kids 6 – 15 to measure outdoor activity, lifestyles and constraints**
- **65% spend 2 or more hours outside on average weekdays**
- **74% spend 2 or more hours outside on average weekend days**
- **For most boys activities include just playing outdoors or hanging out; biking, jogging, walking, skate boarding, etc.; or playing or practicing team sports**
- **For most girls activities include just playing outdoors or hanging out; biking, jogging, walking, skate boarding, etc.; or studying or reading while sitting outdoors**
- **Other sports, e.g., tennis, golf, and attending camps, field trips, outdoor classes also important activities**



National Kids Survey



Age of young person	Pcnt
6-9	24.4
10-12	19.9
13-15	21.1
16-19	34.6

•On-going survey of activity, lifestyles

•65% spend 2 or more weekdays

•74% spend 2 or more weekend day

•For most boys activities hanging out; biking or playing or practicing

•For most girls activities hanging out; biking, jogging, walking or studying or reading while sitting

•Other sports, e.g., tennis, golf, and attending camps, field trips, outdoor classes also important activities

Time outdoors compared to last year	Percent
About the same	46.3
More	37.5
Less	16.2

“More” is partly the effect of being a little older this year, than last year

Outdoor Activities of Youth 6 to 19 Years Old---Notice

different rates between males and females (of the 96 % who go outdoors)

Outdoor Activity		Male	Female	Total
Just playing outdoors or hanging out	Most	86.0	78.2	82.2
Biking, jogging, walking, skate boarding, etc	Popular	75.2	78.9	77.0
Playing or practicing team sports		54.5	34.9	44.9
Reading, studying while sitting outdoors		27.9	42.5	35.0
Other sports, e.g., tennis, golf		34.2	34.3	34.3
Attending camps, field trips, outdoor classes		26.2	32.9	29.5
Hiking, camping, fishing, etc	Nature Based	29.6	26.8	28.2
Bird watching, wildlife viewing, etc		24.7	28.2	26.4
Swimming, diving, snorkeling, etc		19.3	18.8	19.0
Riding motorcycles, ATVs, other off-road vehicles		19.3	12.2	15.8
Snow skiing, snowboarding, cross-country skiing		9.9	9.9	9.9
Boating, jet skiing, water skiing, etc		5.4	7.0	6.2
Rowing, kayaking, canoeing, surfing, etc		5.8	3.8	4.8

National Kids Survey



Reason for not spending more time out	Male	Female	Total
Interested in music, art, reading, etc	50.6	66.7	58.3
Interested in Internet, text messaging, ..	38.5	57.4	47.5
Interested in video games, dvds and tv	51.0	39.9	45.7
More involved in indoor sports	34.6	42.7	38.5
Time at mall, shopping, hanging out	25.3	29.8	27.4
Neighborhood does not have good access	20.4	32.1	26.0
Don't have transportation	15.0	25.3	20.0
Don't have anyone to play outdoors with	16.2	20.6	18.3
It is not safe to play or do sports outside	18.1	10.1	14.2
Injured or developed a health problem	10.3	5.0	7.8

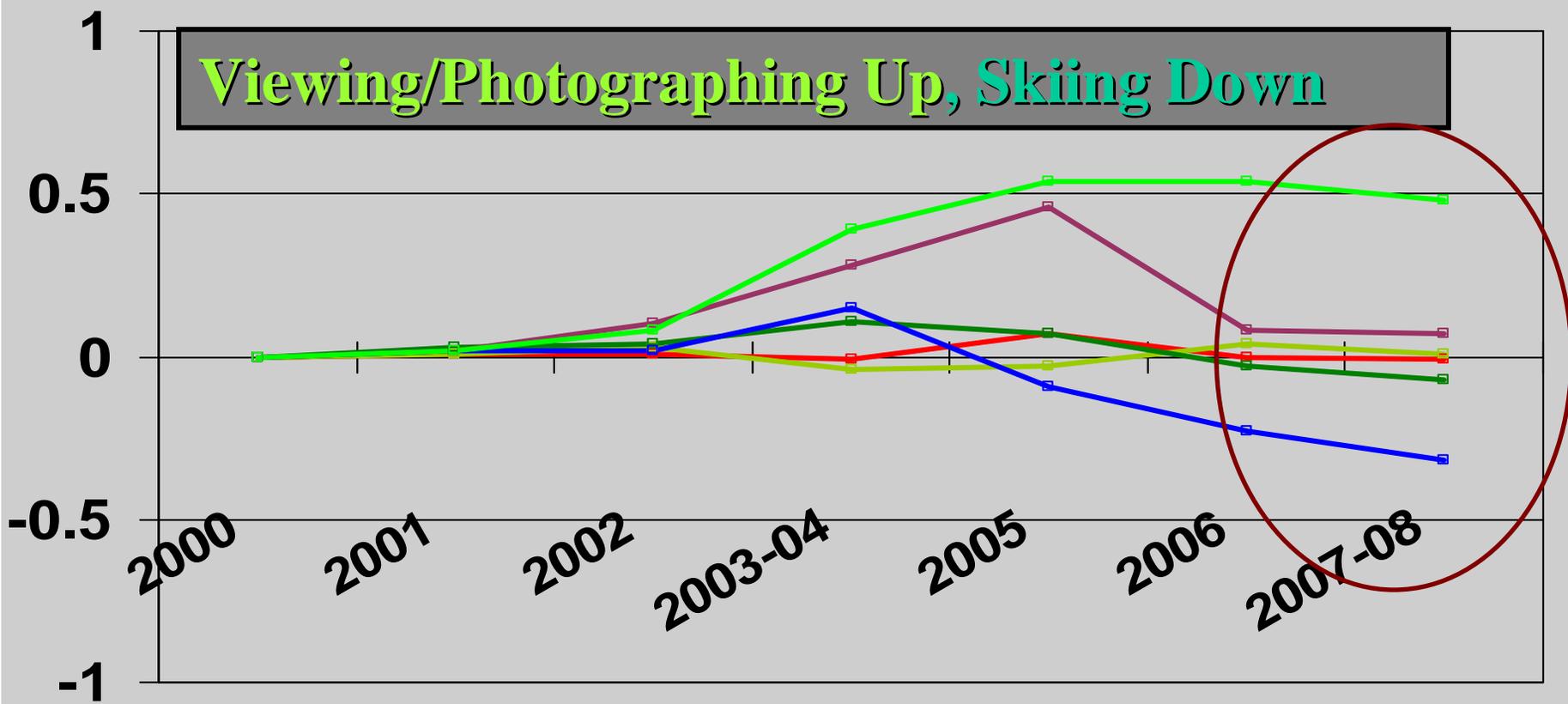
Summary of Trends

- **Recreation activities widely popular in the 1950s through the 1980s are still popular**
- **However, there have been many profound changes over the last 50 years that affect what people choose to do (or not do) for their outdoor recreation**
- **The popularity of outdoor recreation continued to grow up to 2000, and change, e.g., popularity of birding and motorized forms of activity.**
- **By 2000, interest in observing and studying/learning about nature emerging strong**
- **The most noticeable change by 2000 was growth in the proportion of the total population that participated in outdoor activities.**

Summary of Trends

- Outdoor recreation generally, and **nature-based recreation especially**, were still growing through 2007.
- The mix of Americans' activities, however, was **changing** over time, noticeably (e.g., viewing/photographing nature and motorized off-highway riding growing)
- Some traditional activities were declining, like picnicking, visiting historic sites, canoeing, rafting
- **BUT**, there have been enormous changes since 2007---gas prices, finance industry, recession,, and they continue to change
- Gas prices did affect trips and activity selection
- Kids still do spend time outdoors
- The wildest wild card will likely be climate change

Total annual recreation activity days, moving 3-year averages

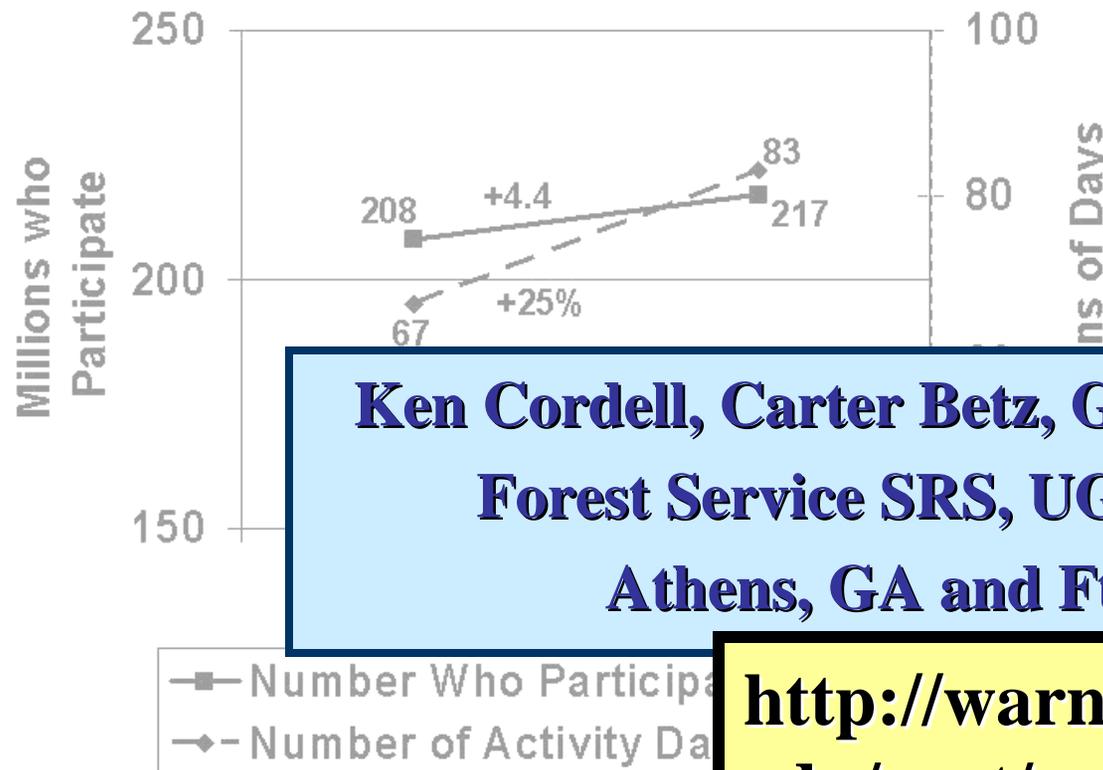


Indexing for Groupings of Activities

- Hunting /Fishing
- Backcountry Activities
- Non-Motor Boating
- Snow Skiing
- Motorized Activities
- Viewing Activities

Recreation Demand Trends---An Update

May 5, 2009



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<http://warnell.forestry.uga.edu/nrrt/nsre/index.html>

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