

Trends in Outdoor Rec. Participation

By H. Ken Cordell, Barbara L. McDonald, Jeff Teasley, and John C. Bergstrom

Outdoor recreation is widely popular. Among people over 15 years old in the United States, almost 95 percent participate in some form of recreation outdoors. Walking, visiting beaches, family gatherings, and sightseeing are the most popular among outdoor pursuits. But many other types of outdoor recreation opportunities are available and popular on our vast public lands, as well as through private providers. On land, on water, or over snow and ice, millions of Americans in increasing numbers are building memories through outdoor recreation (See Table 1 below).

PARTICIPATION IS GROWING

Nature-based outdoor recreation is especially popular. From bike touring in the scenic Rockies to canoeing in the Okefenokee Swamp, the numbers of Americans participating is growing steadily. The 10 activities that have grown fastest as tracked through the ongoing federal survey series (the National Recreation Survey) include Birdwatching, Hiking, Backpacking, Downhill skiing, Primitive camping, Attending outdoor concerts and plays, Off-road vehicle driving, Walking for fitness or pleasure, Sightseeing, and Developed Camping (Table 2a).

DEMOGRAPHIC DIFFERENCES

Outdoor recreation has traditionally been most popular among young-to-middle aged, white, middle-to-upper income

males. But this has been changing in recent years as the U.S. population diversifies, the average age increases, and taboos governing women's place in the "great outdoors" change. Men still dominate in numbers and percentages in activities such as hunting, backpacking, fishing, and rock climbing. But the percentage growth in women who participate is higher than growth in men participating across many types of outdoor recreation. Included among activities where women are in fast growing numbers are bicycling, fishing, camping, canoeing/kayaking and a growing list of activities. Growing disproportionately fast, too, is participation by older Americans, and participation by non-white ethnicities or races. This shift in the outdoor recreation market is reflected in the comparisons of percentage growth in number of activities in which people in various demographic groups participate over the course of a year between the early 1980s and the mid-1990s (Table 2b).

Table 2a - 10 Fastest Growing Activities in the U.S.
(in millions)

Activity	Early 1980s	Mid-1990s	% Change
Birdwatching	21.2	54.1	+155
Hiking	24.7	47.8	+94
Backpacking	8.8	15.2	+73
Downhill Skiing	10.6	16.8	+59
Primitive Camping	17.7	28.0	+58
Outdoor Concerts/Plays	44.2	68.4	+55
Off-Road Vehicle Driving	19.4	27.9	+44
Walking for Fitness or Pleasure	93.6	133.7	+43
Sightseeing	82.3	113.4	+40
Developed Camping	30.0	41.5	+38

Table 2b - % Change in Number of Activities per Person per Year
(Early - 1980s to mid-1990s)

Male/Female	Women +43%	Men +38%
Race	Blacks +60%	Whites +38%
Age	Over 60 +167%	25-39 years +38%
Annual Income	Under \$15,000 +80%	Over \$50,000 +20%
Education	No high school +266%	4+ years college +22%

GROWTH IS PREDICTED TO CONTINUE

Greater participation across demographic groups adds up to greater overall participation from activity to activity, and in all types of outdoor settings. In the future, participation is predicted to continue to rise. The projections for the year 2010 (Table 3a) are reflective of rising population, future income levels, age changes, and a number of other factors (Bowker et al., forthcoming).

AND THEN THERE ARE...ENTHUSIASTS

One "group" particularly warrants close scrutiny as we think of the future for outdoor recreation in the United States. These are the "Enthusiasts." Enthusiasts are the top 1/3 most active of participants among various outdoor recreation activities who are the most active in terms of the number of days during the year on which they participate in an activity. With few exceptions, the enthusiasts constitute between only 25 to 33 percent of the participants in any given activity, but they account for 75 to 90 percent of the total number of days of

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Table 1 - Outdoor Recreation Participation in the U.S.

- Any form of outdoor recreation - 94.5% of Americans over 16 or **189.3 million**
- Viewing and learning about nature and history - **152.6 million**
- Hiking, riding, and running outdoors - **136.9 million**
- Picnicking, family gatherings, and other social activities - **135.9 million**
- Attending outdoor concerts and sporting events - **117.6 million**
- Swimming in pools, oceans, lakes, streams, or ponds - **108.6 million**

Table 3a - Activities Projected to Grow Fastest by 2010
(Participation/Days)

Viewing and Photographing Wildlife	+27%
Sightseeing	+27%
Visiting Historic Sites	+26%
Downhill Skiing	+22%
Developed Camping	+19%
Walking Outdoors	+17%

Table 3b - Participation in U.S. Activities by Enthusiasts

Activity	Total participation days (millions)	% of days by Enthusiasts (percent)	% of U.S. population who are Enthusiasts (percent)	Minimum # of days to be an Enthusiast (days)
Birdwatching	4,749	91%	9.1%	50
Hiking	805	83%	7.1%	10
Warmwater Fishing	726	82%	6.2%	14
Developed Camping	442	75%	6.3%	8
Horseback Riding	336	94%	2.3%	6
Backpacking	130	81%	2.4%	5
Downhill Skiing	126	74%	2.6%	6
Kayaking	19	78%	0.2%	5

participation across all participants. By accounting for the majority of the times during a year that Americans participate in outdoor activities, the Enthusiasts represent the most engaged and interest-

ed segment of the outdoor recreation market (Table 3B). As their tastes and participation go, so will the sales of outdoor equipment, visits to National Forests and Parks, use of services pro-

vided by outfitters and travel agencies, and a host of connected sectors of the U.S. economy.

THE BOTTOM LINE

Participation growth trends, changing demographics, population growth, social diversification, better equipment, easier transportation, and the Enthusiasts all point toward a larger and more diverse demand for outdoor recreation in the coming new century. 享

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REFERENCES AND SOURCES

1982-83 National Recreation Survey, U.S. Department of the Interior and 1994-95 National Survey on Recreation and the Environment, USDA Forest Service. For further information, read "Emerging Markets for Outdoor Recreation in the United States" at the ORCA web site at <<http://www.orca.org>>.

Table 4 - Millions and Percentage Change of Persons 16 years or Older Participating at Least Once in 12 Months in Land, Water, Snow/Ice, and other Activities in the U.S., 1982-83 and 1994-95.

Resource Base and Activity	Number in Millions		Percent Change	Resource Base and Activity	Number in Millions		Percent Change
	1982-83	1994-95			1982-83	1994-95	
Land-resource-based activities				Water-resource-based activities (cont'd)			
Bird watching	21.2	54.1	+155.2	Water skiing	15.9	17.9	+12.6
Hiking	24.7	47.8	+93.5	Fishing	60.1	57.8	-3.8
Backpacking	8.8	15.2	+72.7	Sailing	10.6	9.6	-9.4
Primitive area camping	17.7	28.0	+58.2	Snow & ice-resource-based activities			
Off-road driving	19.4	27.9	+43.8	Downhill skiing	10.6	16.8	+58.5
Walking	93.6	133.7	+42.8	Snow-mobiling	5.3	7.1	+34.0
Sightseeing	81.3	113.4	+39.5	Cross-country skiing	5.3	6.5	+22.6
Developed area camping	30.0	41.5	+38.3	Sledding	17.7	20.5	+15.8
Picnicking	84.8	98.3	+15.9	Ice skating	10.6	10.5	-0.9
Running/jogging	45.9	52.5	+14.4	Outdoor sports & spectator activities			
Bicycling	56.5	57.4	+1.6	Attending an outdoor concert or play	44.2	68.4	+54.7
Horseback riding	15.9	14.3	-10.1	Attending a sports event	70.7	95.2	+34.7
Hunting	21.2	18.6	-12.3	Golf	23.0	29.7	+29.1
Water-resource-based activities				Outdoor team sports	42.4	53.0	+25.0
Motorboating	33.6	47.0	+39.9	Tennis	30.0	21.2	-29.3
Swimming/river, lake, or ocean	56.5	78.1	+38.2				
Swimming/pool	76.0	88.5	+16.4				