

TRENDS IN OUTDOOR RECREATION
IN THE
TWO DECADES SINCE ORRRC¹

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ABSTRACT -- Two decades ago, the Outdoor Recreation Resources Review Commission (ORRRC) published its 27 volume report detailing outdoor recreation supply and demand in the United States. This article investigates the impact of ORRRC on outdoor recreation and traces widespread trends that have since occurred. Trends in society, the amount and direction of outdoor recreation participation and expenditure, legislation, and government and private outdoor recreation supply are examined. Since the ORRRC reports were written, there have been major shifts in outdoor recreation including: rapid growth in number of participants, shifting patterns of recreational activity participation, continuing regional supply and demand imbalances, and changes in the roles of the government and private sectors.

INTRODUCTION

Twenty years ago, gas was \$0.26 per gallon, a new Ford cost under \$3000, John Kennedy was President, beach movies were in, fins were out, and the Beatles hadn't yet invaded the United States. The 50s and 60s were a period of prosperity for Americans. A major trend to emerge from this prosperity was greater participation in outdoor recreation and other leisure activities.

In response to rapidly growing outdoor recreation participation, Congress initiated in 1958 an extensive nationwide

¹This paper is derived from a more comprehensive report on national trends in outdoor recreation supply and demand being developed for publication by the USDA Forest Service, Washington, D.C. Conclusions drawn from the data in this paper and those drawn from the more comprehensive report are strictly those of the authors, and do not necessarily reflect Forest Service policy or force assumptions.

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assessment of outdoor recreation. The Outdoor Recreation Resources Review Commission (ORRRC) was commissioned by Congress in 1958 to assess the outdoor recreation wants and needs of Americans and the available and potential recreation resources of the Nation, based on projections of future outdoor recreation participation. ORRRC also identified needed policies and programs. Three of the major findings of ORRRC were:

1. Opportunities for outdoor recreation are most needed near urban areas,
2. The available land for recreation does not effectively meet the need,
3. Additional funding for outdoor recreation is needed (ORRRC 1962a, pp.3-4).

Partly as a result of ORRRC, nearly 10 million acres of recreation lands have been purchased by Federal, state, and local governments between 1962 and 1982. Also, national systems of wilderness, rivers, trails, and recreation areas were preserved, and open space in and near metropolitan areas was acquired (Diamond, et al. 1983: p. 1).

We are now halfway through the 40-year period considered by ORRRC. Recently, several interest groups, many of whom were involved in the original ORRRC, have begun to ask where we stand in meeting ORRRC's recommended goals. The principal group has been the Outdoor Recreation Policy Review Group (ORPRG), convened by Laurance Rockefeller in 1982. This private group convened because of a deep concern about the fate of outdoor recreation during a critical time of economic instability, a rapidly changing society, and challenges from the Federal Administration concerning outdoor recreation programs. As a result of the ORPRG effort, on April 19, 1983, S. 1090 was introduced to the Senate to establish a second ORRRC.

Examinations of broad policy issues, like that of ORPRG, are essential to maintenance and improvement of an effective outdoor recreation delivery system. Better understanding of current issues can be greatly extended by a careful examination of the events and trends that have precipitated those issues. This paper examines many of the events and changes in outdoor recreation demand and supply that have occurred since 1960. The supply trends reported here were originally developed as an unpublished background paper (Cordell, et al, 1982) used by the ORPRG to assist in establishing recommendations for Congressional action. Some of the demand trends were obtained from two other background reports prepared for ORPRG through the National Recreation and Park Association (National Recreation and Park Association 1982), and Resources for the Future (Clawson 1982). Most of the demand trends, however, were drawn from time series data from a number of other federal and private sources.

While the trend data presented in this paper are not original, our synthesis and interpretation of them are. Baseline descriptions of trends in light of the emerging issues and opportunities of the 1980s also help to identify directions and hypotheses for further, more in-depth research.

TRENDS IN OUTDOOR RECREATION DEMAND

Changes in outdoor recreation behaviors reflect changing values, habits, and conditions in our society. Since 1960, four distinct changes have surfaced that are linked to outdoor recreation. First, there are now 53 million more people in this country, and there is significant movement of our population to the South and West. Our population is also aging and becoming more age-segmented in its recreation demands. Second, declines in economic growth and a more conservative fiscal attitude by the American public and elected officials have led to some serious reshuffling of governmental spending and program priorities. Third, leisure has become a more important part of our lifestyle than ever before. For many, effective use of leisure now drives lifestyles and work habits. Finally, decentralization is reshaping industry, government, and institutions, and this reshaping seems to be having significant effects on lifestyles and outdoor recreation behaviors.

The following examination of outdoor recreation participation since ORRRC draws on selected results of population surveys and studies of expenditure and travel patterns.

Participation

ORRRC conducted a nationwide recreation participation survey (NRS) and developed projections to 1976 and 2000. ORRRC reported that almost 90 percent of the population participated in outdoor recreation in 1960. ORRRC, however, did not have perfect foresight. It predicted a 38 percent increase of population that would be younger by the late 1970s with growth of participation in outdoor recreation exceeding 60 percent (ORRRC 1962). Newly available data show a somewhat different actual outcome. In the summer of 1982, portions of that 1960 national survey conducted were replicated through a cooperative effort among Federal agencies.³ In Table 1, that portion of the data are reported that represent outdoor recreation by persons in the United States 12 years of age and older during June through August in 1960 and 1982.

³The 1982-1983 National Recreation Survey is a cooperative effort being conducted by the Bureau of the Census for the U.S. Forest Service, National Park Service, and the Bureau of Land Management. The National Park Service undertook the principal role in administering the survey procedure.

Table 1.—National population Trends in summer participation in selected outdoor recreation activities by persons 12 years and older, 1960-1982.

Activity	1960		1982 ²		Growth in numbers of participants, 1960-1982
	Persons over 12 (million) ¹	proportion of population (percent)	persons over 12 (million) ¹	proportion of population (percent)	
Picknicking	69.2	53	76.8	39.9 ⁶	+ 11.0
Driving for pleasure	67.9	52	73.5	38.2 ⁶	+ 8.2
Swimming ³	58.7	45	75.5	39.2	+ 28.6
Sightseeing	54.8	42	72.3	37.6 ⁶	+ 31.9
Walking for pleasure	43.1	33	84.6	44.0 ⁶	+ 96.3
Playing outdoor Sports ⁴	39.2	30	47.1	24.5	+ 20.2
Fishing	37.8	29	43.3	22.5	+ 14.6
Attending outdoor sports	31.3	24	59.1	30.7 ⁶	+ 88.8
Boating	28.7	22	32.0	16.6	+ 11.5
Attending outdoor cultural events	11.7	9	42.1	21.9 ⁶	+259.8
Bicycling	11.7	9	39.6	20.6	+238.5
Camping ⁵	10.4	8	27.3	14.2	+162.5
Hiking	7.8	6	17.9	9.3	+129.5
Water skiing	7.8	6	12.1	6.3 ⁶	+ 55.1
Horseback riding	7.8	6	8.6	4.5	+ 10.3
Hunting	3.9	3	4.3	2.2	+ 10.3
Canoeing	2.6	2	11.4	5.9	+339.5
Sailing	2.6	2	7.0	3.6	+169.2

¹These reported numbers are approximations based on rounded percentages of population participation. The assumed population base of persons 12 years and older in 1960 is 130.5 million (ORRRC 1962) and in 1982 is 192.38 million (Dept. of Commerce. 1982 Survey of Buying Power Statistics).

²None of the 1982 data are adjusted for possible bias due to different probabilities of being included in the sample because of different numbers of persons among sample households.

³Includes pool and other outdoor swimming.

⁴Includes team and individual sports, plus tennis and golf.

⁵Includes developed, primitive, and other camping, except backpacking.

⁶Estimates are for participation during the 12-month period preceding the interview date, September 1982. For these activities, respondents were not asked about participation in the last four months.

The comparison of number of participants and estimated percent of population participating in summer outdoor recreation between 1960 and 1982 reveals several important trends. For example, those summer activities that were most popular in 1960 are, for the most part, still the most popular. These activities include picnicking, driving for pleasure, swimming, sightseeing, and walking for pleasure, and playing outdoor sports.

A second trend is that the proportion of the population that participated in seven of the top nine of these more popular summer activities listed in Table 1 has declined. That decline was strong enough for picnicking and driving for pleasure, fishing, and boating, to result in growth rates between 1960 and 1982 that were far below the rate of population growth during this period, 47 percent. The growth rates of horseback riding and hunting also were substantially below the rate of growth of the population of persons 12 years old and older. These very slow growth rates bring into question some widely accepted assumptions about the relative effects of demand growth factors such as income, age, and leisure time.

Among the nine most popular of the summer activities listed in Table 1 (for 1960), walking for pleasure showed the strongest growth, up 96 percent. It is very likely that growth in this activity occurred because participation requires little if any travel cost, and because it is physically-oriented activity. Further attesting to the physical fitness orientation of our contemporary society, almost 19 percent of the 1982 survey respondents reported that they participated in jogging.

Among all of the 18 activities in Table 1, we can note three levels of growth in number of participants:

1. Slight(less than 1 percent per year)--picnicking, fishing, playing outdoor sports, motorboating, driving for pleasure, horseback riding, and hunting.

2. Moderate(between 1 and 3 percent per year)--swimming, sightseeing, water skiing.

3. Rapid increase(greater than 3 percent per year)--walking for pleasure, attending outdoor sports, attending outdoor cultural events, bicycling, camping, hiking, canoeing, sailing. It is interesting that none of these rapid-growth activities requires motorized equipment and that half of them are physically active.

Among the activities in Table 1, our planning and management attention in the near future perhaps should focus on:

1. Walking for pleasure (+41.5 million), bicycling (+27.9), attending outdoor cultural events (+31.4 million), and attending outdoor sports (+27.8), because these activities have shown the largest increases in numbers of participants,

2. Camping (+162 percent), hiking (+129 percent), sailing (+169 percent), and canoeing (+338 percent), because these activities are among those to show the largest (more than doubled) percentage rates of growth up to 1982.

Among these 18 activities, percentage growth in millions of participants per activity is less among water-based activities (31 percent) than among land-based activities (54 percent). The energy nondependent activities, bicycling, canoeing and sailing, have been growing at very rapid rates; whereas driving for pleasure and motorboating participation have been growing much more slowly. In total, the number of reported participants among all activities (double counting those participants in more than one activity) has increased about 48 percent, almost exactly the rate of population growth. This is much less than the 60 percent plus predicted by ORRRC.

The A.C. Nielsen Co. has also conducted national surveys, at 3-year intervals, starting in 1973 (Figure 1). The 1982 Nielsen survey of 30 sport and outdoor recreation activities indicated the 10 most popular activities to be, in order, swimming (45 percent of the U.S. population), bicycling (32 percent), fishing (28), camping (27), boating (19), bowling (18), physical conditioning (equipment oriented) (15), jogging/running (15), roller-skating (13), and pool/billiards (13). These estimates of percentage of the population participating compare very closely with the 1982 NRS estimates.

Of the 10 most popular sports surveyed by Nielsen, participation in all but swimming and pool/billiards increased between 1973 and 1982. Bicycling and boating increased strongly. Among other sports Nielsen surveyed, snow skiing participation more than doubled, hunting and ice skating decreased; water skiing and snowmobiling increased, while sailing increased strongly (Nielsen 1982). These differential changes in participation rates indicate that the mix of activities which persons participate in has changed substantially over time, as was indicated by the comparison between the 1960 and 1982 NRS.

Some of the differences between the Nielsen and NRS surveys seem to be the reflection of more recent short-term changes by Nielsen, while the NRS data reflect longer term trends. Close scrutiny of these shorter term trends are useful in better understanding directions of change starting in the late 1970s and continuing into the 1980s. Other differences between the surveys are likely due to our inclusion of only summer participation in Table 1; the Nielsen survey data were year round reported participation.

The U.S. Fish and Wildlife Service has conducted population surveys to determine characteristics of hunting and fishing participation since 1955. These data also provide some meaningful trends in number of participants, amount of expenditures, and days of participation (Table 2). In general,

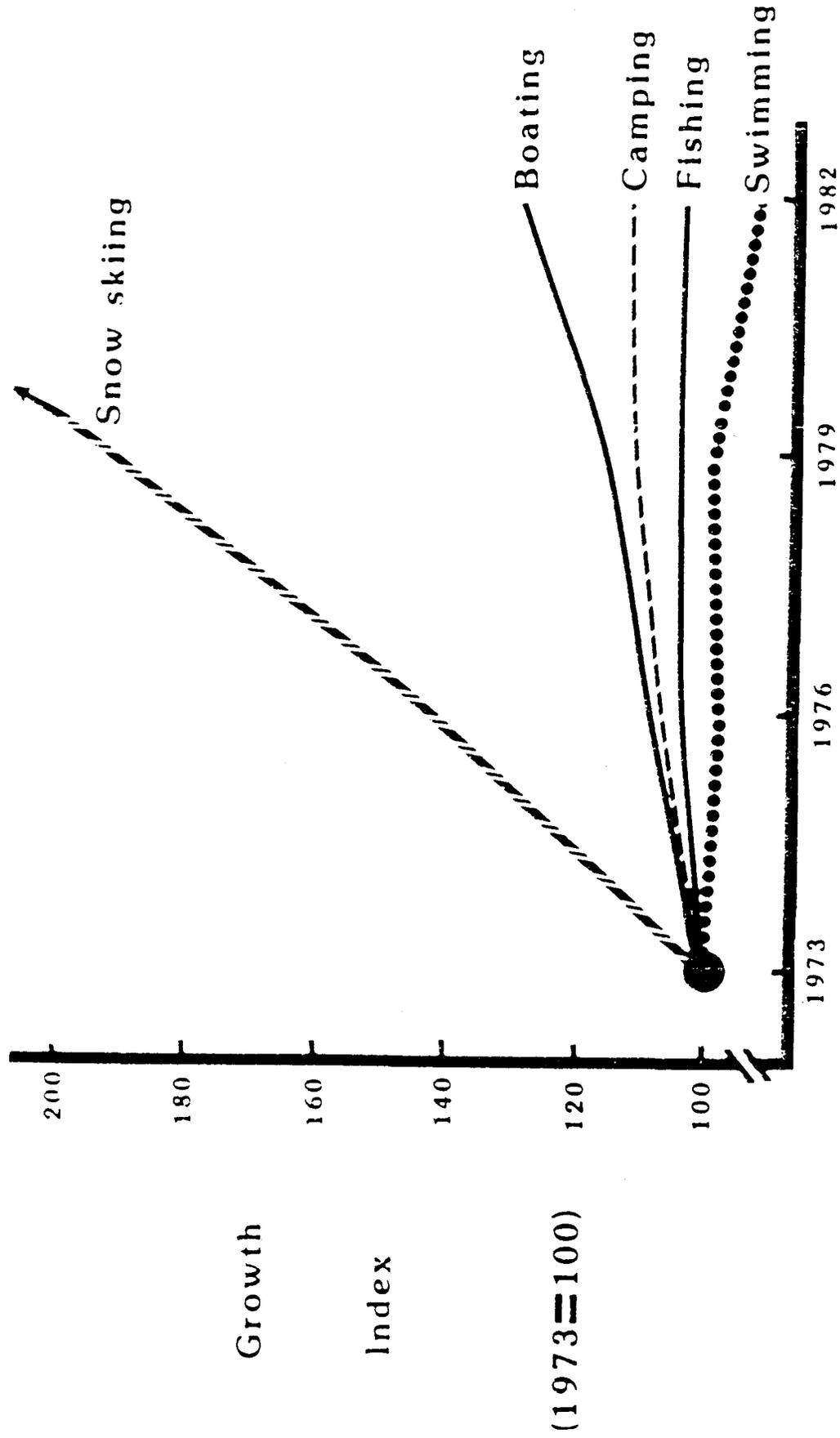


Figure 1.--Change in participation in selected outdoor activities from 1973 to 1982

Table 2.--Number of participants, amount of dollar expenditures, and days of participation in hunting and fishing, 1960 and 1980

Characteristic of Participation	Number		Percentage Change
	1960	1980	
	(million)	(million)	
Hunters	14.6	16.8	15.1
Fishermen	25.3	41.9	65.6
Spending for hunting	\$1,161.2 (1315.9) ¹	\$8,938.2 (3619.9) ¹	669.7 (188.7)
Spending for fishing	\$2,690.9 (3049.6) ¹	\$18,052.3 (73311.2) ¹	570.9 (139.7)
Days of hunting	192.5	387.3	101.2
Days of fishing	465.8	1,001.6	115.0

¹Dollar level of expenditure corrected for inflation and expressed in 1967 real dollar terms.

SOURCE: USDI Fish and Wildlife Service, 1960 National Survey of Fishing and Hunting. Washington, D.C.; U.S. Government Printing Office, 50 pages and USDI Fish and Wildlife Service, 1980 National Survey of Fishing, Hunting, and Wildlife Associated Recreation. Washington, D.C., U.S. Government Printing Office, 156 pages.

hunting and fishing participation increased in the 20 years, 1960 to 1980. Numbers of hunters grew 15 percent (2.2 million people), while numbers of fishermen grew over 65 percent (16.6 million people). But, expenditures for hunting pursuits grew almost 670 percent, and expenditures for fishing grew 571 percent. Expressed in 1967 inflation-adjusted dollars, however, the growth in expenditures for hunting and fishing appear more realistic in that they grew 189 and 140 percent, respectively, in 20 years.

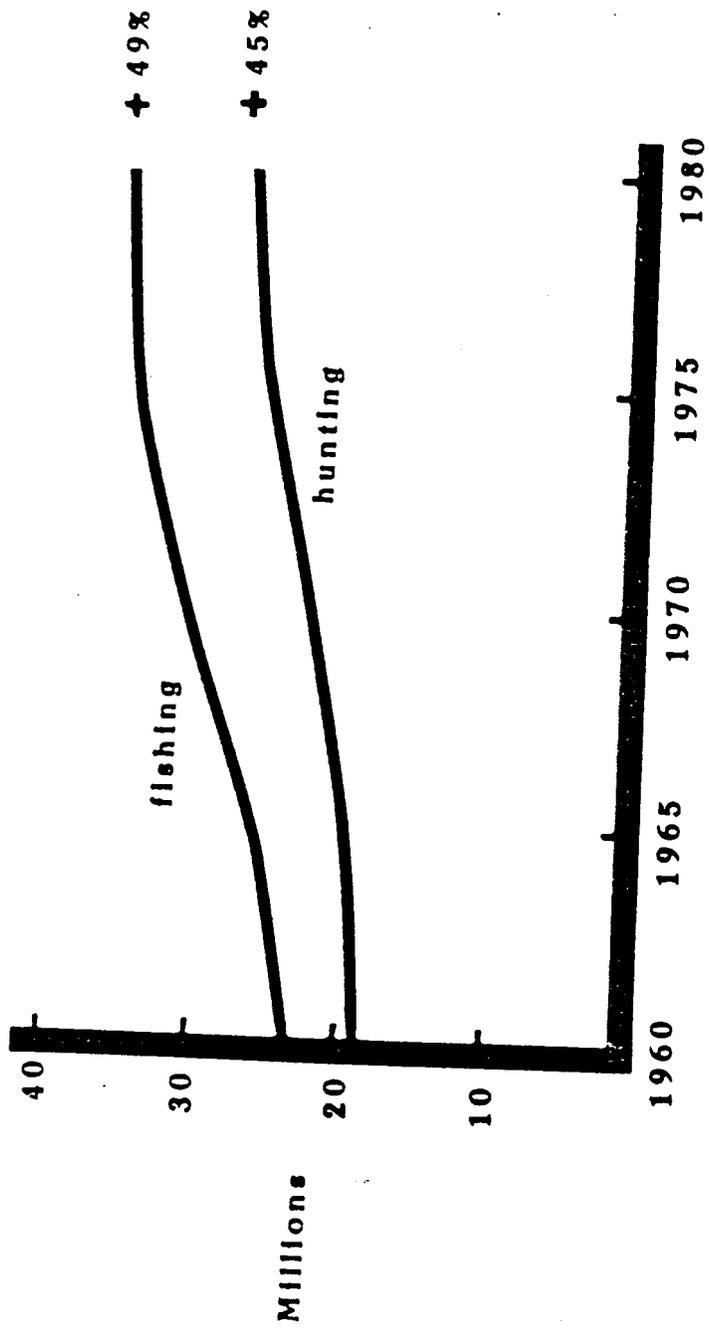
Like many of the other trends in outdoor recreation, growth in participation was greatest in the sixties and early seventies. From 1975 to 1980, growth ceased and there were actual declines in total number of days of participation: -5.3 percent for fishing and -3.5 percent for hunting (U.S. Fish and Wildlife Service 1982, p. 136).

In evaluating the significance of changes in participation percentages, one should keep in mind that there are now 53 million more people in the United States than existed in 1960. Thus, even a 1-percent change in number of people participating in an activity means about 500,000 more or less participants. Recent rates of participation growth have not seemed to reach the levels usually predicted. Among the 22 activities surveyed by Nielsen, in both 1973 and 1982, there was an overall increase in number of participants of only 2.3 percent, less than the rate of population growth during that period. Previous predictions of participation growth rates have usually exceeded the population growth rate. This and other evidence seems to be indicating a general decline in the rate of growth of outdoor recreation participation.

Another indicator that the rate of growth of outdoor recreation participation may be declining is the level of hunting and fishing license sales. From 1960 to 1975, license sales grew at an increasing rate; after 1975, the rate of growth in license sales for both hunting and fishing activities fell (Figure 2, USDA Forest Service 1983). It is uncertain whether these are long-term or cyclical trends, but they should be carefully monitored.

Physical fitness is a major new factor in outdoor recreation. A recent fitness study indicated that almost half the adult population practices some form of exercise on a regular basis compared to only 24 percent in 1960. This change in lifestyle could translate into some dramatic changes in sports participation and leisure spending in the future. Perhaps the "fitness craze" is beginning to substitute for some of the more traditional resource-based outdoor activities.

National participation surveys indicate continued increases in participation, even though at perhaps slower rates of growth. At the same time, numbers and acreage of developed Federal recreation areas seem to be falling. Overall, use of Federal lands for recreation grew 138 percent in the 21 years between



**Figure 2.--Sales of hunting and fishing licenses
in the United States, 1960 to 1980**

1960 and 1981 (Figure 3, Driver and Rosenthal 1981). This is an annually compounded growth rate of 4.24 percent--a dramatic increase in visitor use compared to population growth of about 1 percent per year. The most dramatic growth in visits occurred on National Parks and Corps of Engineers projects. However, since about 1979, reported growth in visitation to some Federal lands has leveled out. This is true, for example, of visitation to National Forests and National Wildlife Refuges.

Reported visits to state park systems have grown from 269 million in 1960 to 549 million in 1980 (ORRRC 1962d; National Recreation and Park Association 1971; National Association of State Park Directors 1980). This is an overall increase of 105 percent in 20 years; a compounded annual growth rate of 4.46 percent, slightly larger than growth of visits to Federal lands.

Expenditures

General population participation and area visits are common measures of recreation demand, but there are other useful measures, such as consumer spending. The level of expenditures for outdoor recreation has climbed steadily during the last two decades for a variety of reasons. These reasons include population growth, more vacation time, three-day weekends, rising disposable income, and especially a developing leisure ethic which regards recreation not only as acceptable, but as necessary.

Nationally, leisure expenditures (recreation and hobbies, crafts, books, entertainment, etc.) have risen from \$58 billion a year in 1965 to \$244 billion in 1981 (U.S. News and World Report 1981). This is a 47 percent increase in inflation adjusted dollars. Recent studies from Pennsylvania and Canada show that about 12 percent of personal consumption dollars is being spent on leisure (Pennsylvania Department of Environmental Resources 1982; Zuzanek 1976). But, like participation growth, the rate of increase in personal expenditures for recreation seems to have been declining in the late 1970s (Figure 4, U.S. Department of Commerce 1979). With these levels of expenditures, it is not surprising that one of every 15 jobs in the country is directly related to the leisure industry (Owens 1978).

More significant than dollars spent, perhaps, is the percentage of disposable income spent on recreation, which has increased from 5.27 percent in 1929 to 6.27 percent in 1979 (U.S. Department of Commerce, quoted by Kitchen, Miller, and Graves 1982). This percentage has remained stable during the last 10 years. Thus, recreation spending has increased not only as disposable income has increased during the last 50 years, but also as the percentage of disposable income allocated for recreation has increased by almost 20 percent.

Many factors are related to levels of recreation expenditures and travel. Among these, amount of time for leisure pursuits seems to be quite important as a barrier to greater

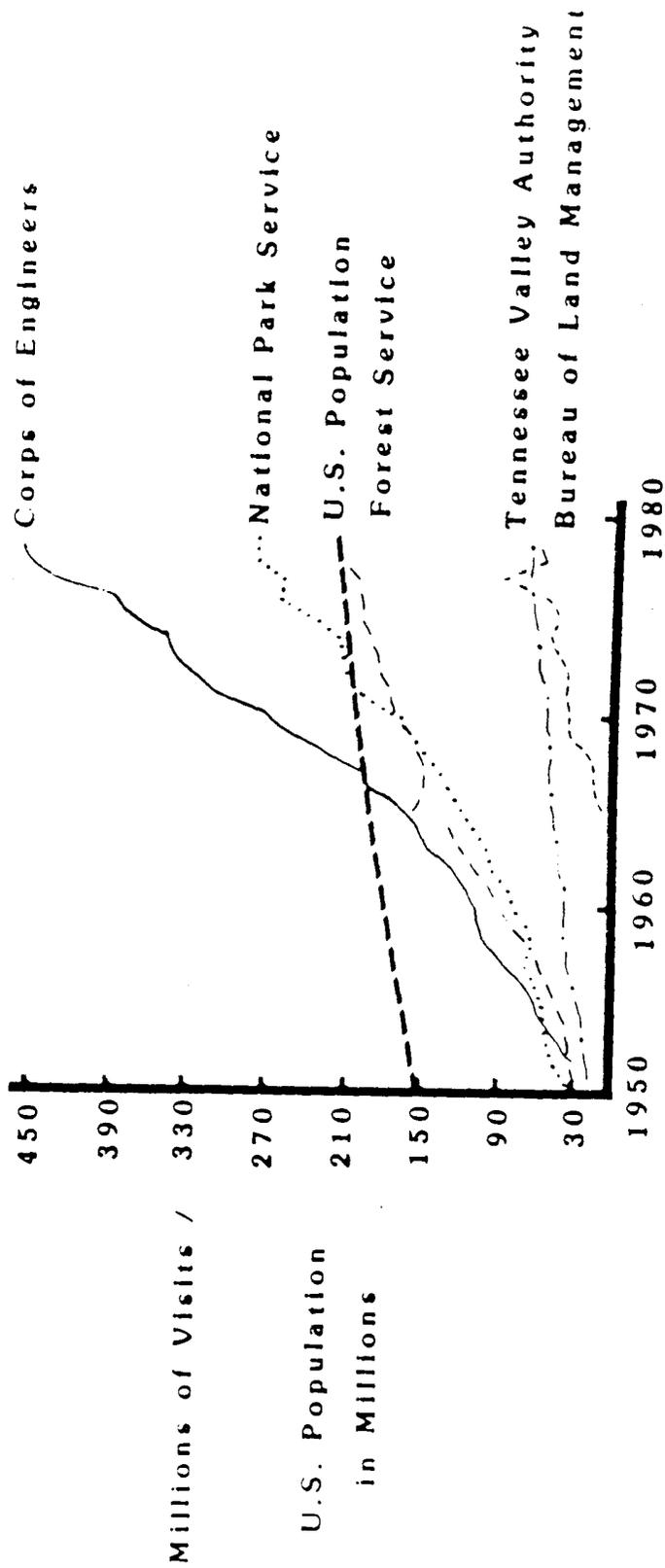


Figure 3.--Change in number of visits to federal recreation areas by agency, and population of the United States, 1950 - 1980

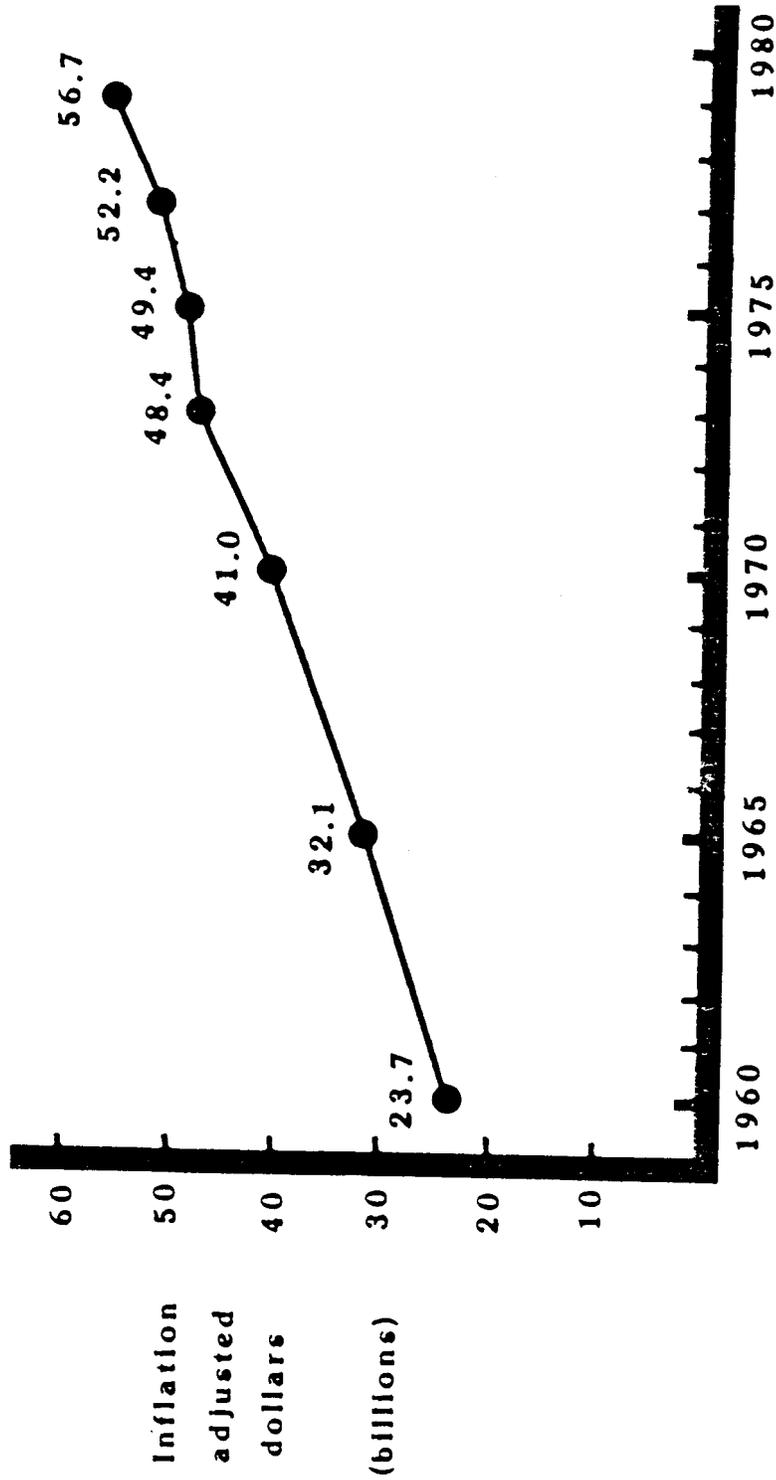


Figure 4.--Personal expenditures for recreation
in the United States, 1960 to 1979

participation. In recent studies, the most frequently cited barrier to participation was "lack of time," and this held true whether the sample was low-income, central city residents, or a cross-section of the American public (University of Wisconsin - Madison 1977; Heritage Conservation and Recreation Service 1979).

Trends in expenditures on tourism are another indicator of changes in demand for outdoor recreation. Although tourist expenditures are mostly for food, lodging, and travel, tourism patterns are usually associated with natural outdoor recreation attractions around which tourist accommodations are usually developed.

In 1965, gross tourist receipts in the United States were estimated at \$30.6 billion. By 1979, the level had increased to \$56.9 billion (1967 inflation adjusted dollars). Total growth between 1965 and 1979 was 85.8 percent and the annually compounded growth rate was 4.5 percent. This rate is approximately the same as annual growth rates for visits to Federal recreation areas (4.2 percent) and to state parks (4.4 percent). But, like outdoor recreation participation, the annual rate of growth has not been constant throughout the 1960s and 1970s. Growth was erratic but substantial between 1965 and 1972 at between 7 and 14 percent per year. Since 1976, however, growth has slowed, and between 1978 and 1979 no growth occurred.

Tourism expenditures have been shifting along with population to the South and West. While the North Central and North Eastern regions lost 8.3 and 7.7 percent of the aggregate tourism market, respectively, the West gained 10.4 percent and the South gained 4.7 percent (Table 3). The West had only 12.1 percent to the market in 1965, but that region's market share rose to 22.5 percent in 1979. One-third of all tourist expenditures were in the South in 1965, but by 1979 that share had grown to 38 percent of the national total. The most rapid growth in tourism expenditures since 1965 occurred in the Pacific, West South Central, and East South Central regions (Goeldner and Dicke 1981).

At least through the mid-1970s, increasing amounts of leisure have made additional time available for recreation. Robinson (1979) found a 10 percent increase in leisure among adults from 1965 to 1975. Media consumption (radio, TV, movies, reading) was the biggest component of leisure time and rose from 14.7 hours a week in 1965 to 18.2 hours a week in 1975, due primarily to increasing time spent with television. Since 1975, however, audience research indicates that time spent both viewing television and reading newspapers has leveled off or declined slightly. This trend is consistent with increasing participation in physical fitness activities, but is also consistent with recent trends toward employment of both husband and wife and increased number of people holding two jobs.

Table 3.—Growth and market share of tourist expenditures by region for 1965 and 1979.

Region and Subregion	1965		1979		1965-1979 growth ^b	Gain or loss of market share
	Expend. ^a	Share of Market	Expend. ^a	Share of Market		
	(billions)	(percent)	(billions)	(percent)		(percent)
West	\$3.7	12.1	\$12.8	22.5	149.9	+10.4
Pacific					401.4	
Mountain					90.4	
North Central	9.3	30.3	12.5	22.0	135.0	- 8.3
West					99.3	
East					121.1	
North East	7.1	23.2	8.8	15.5	23.7	- 7.7
Mid Atlantic					12.7	
New England					64.4	
South	10.2	33.3	21.6	38.0	110.1	+ 4.7
West S. Central					191.7	
East S. Central					129.2	
South Atlantic					90.2	
Hawaii	0.3	1.0	1.1	1.9	322.4	+ 0.8
Alaska	0.02	0.1	0.09	0.1	350.0	0

^a Billions of dollars adjusted for inflation to base year 1967 using the Consumers Price Index.

^b Level of aggregate tourist expenditures for 1979 divided by level of expenditures for 1965.

SOURCE: Goeldner, Charles R. and Karen P. Dicke. 1981. Travel Trends in the United States and Canada. Boulder, Colorado: Business Research Division, Graduate School of Administration, University of Colorado. p. 46.

TRENDS IN OUTDOOR RECREATION SUPPLY

Dramatic steps have been taken in this country in the last two decades to create outdoor recreation opportunities. This section examines these steps and their effects, many of which were direct responses to ORRRC recommendations.

Outdoor recreation supply is defined for this paper as numbers of facilities, acres, areas, and miles of land and water accessible and/or developed for recreational use by the public². Because only trends in numbers of acres or areas are reported, little can be said about changes in the effectiveness of our supply. We recognize that measures incorporating physical and social capacity are more preferred and meaningful, but these data are not available. However, the simple numerical counts reported here are comparable with the descriptive data reported by ORRRC and thus provide interesting trend indicators which the readers can interpret in the way most meaningful to their own situation.

Outdoor Recreation Related Legislation

In 1956 the National Park Service launched "Mission 66" to improve National Park facilities. One year later the Forest Service initiated "Operation Outdoors" to improve National Forest recreation facilities. Many of the facilities improved upon were originally constructed by the Civilian Conservation Corps in the 1930s. Beyond the facility improvement programs, management and development for recreation became official policy for the Forest Service and the bureau of Land Management in their multiple use acts of 1960 and 1964, respectively.

The ORRRC recommended several legislative acts: a new financing system to help Federal, state, and local governments purchase recreation land; a new Federal agency to lead recreation advocacy and coordination; and a multi-level governmental planning process to identify and develop programs to meet long-term needs (ORRRC 1962a). Many of the recommendations of ORRRC were subsequently translated into legislative actions:

- The Land and Water Conservation Fund Act (LWCF) of 1964, which has resulted in the acquisition of more than 5.6 million acres of local, state, and Federal recreation land at a total cost of over \$5 billion. State and local governments matched the \$2.6 billion granted them through the LWCF.
- Legislation established national systems of wilderness, rivers, trails, and recreation areas and resulted in

²Outdoor recreation supply data, units of measure, and definitions, are not totally comparable between 1960 and 1983. However, a large amount of comparable data and information are available, and direct comparisons have been made where possible to indicate the magnitude of change.

the designation of 79.8 million acres of wilderness, 2,400 miles of wild, scenic and recreational rivers, and over 680 National Recreation Trails totaling over 7,000 trail miles.

- More than 100,000 acres of Federal surplus land were transferred to state and local governments for park and recreation purposes.
- Federal, state, and local recreation areas were established in or near populated urban centers.

ORRRC also brought attention to other quality of life issues that subsequently evolved into a broad-based concern for environmental quality. Congress reacted to these concerns by enacting wide-ranging legislation to protect air and water quality. The construction program of the Clean Water Act was intended partly to improve lakes, rivers, and streams for fishing and swimming. The Forest and Rangeland Renewable Resources Planning Act of 1974 and the Federal Land Management and Policy Act of 1976 reflected growing interest in improved management of the National Forests and public domain, including protection of recreation, water, and wildlife resources.

ORRRC's early emphasis on the acquisition of recreational land has thus turned to protection of resources and the quality of the environment. What had been known 20 years ago as "outdoor recreation" has since been incorporated into resource protection and environmental quality concerns that command the public's attention. These issues include: the designation of wilderness and its long-term protection, protection of air and water quality in National Parks from energy development nearby, and the preservation of scenic and historic areas.

Recreation has not seemed to remain a major concern in government. Government financial support has diminished for both rural and urban recreation. For example, Federal expenditures for outdoor recreation acquisition, development and management grew from \$85 million in 1960 to over \$718 million in 1978 (in 1967 constant dollars). However, fiscal year 1982 Federal expenditures were now less than \$374 million (in 1967 dollars), little more than the amount spent in 1970 (Figure 5).

Federal Outdoor Recreation Supply

Among the many changes in the Federal recreation estate since 1960, 180 million acres under the jurisdiction of the Bureau of Land Management in 1960 have since been transferred to other Federal agencies, primarily the Fish and Wildlife Service and the National Park Service in the Department of the Interior (Figure 6). These transfers have resulted in a change in the management emphasis of these lands from multiple use to one primarily of preservation.

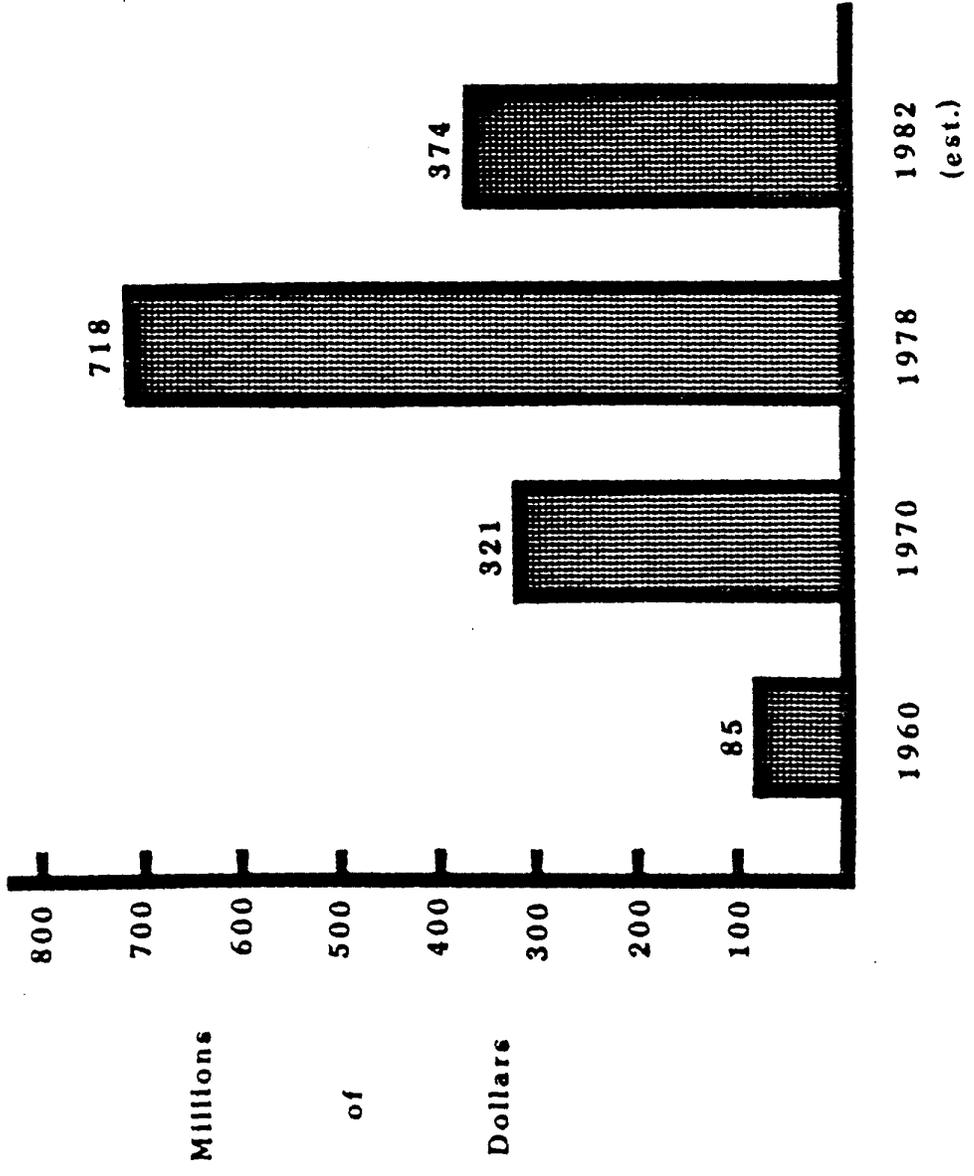
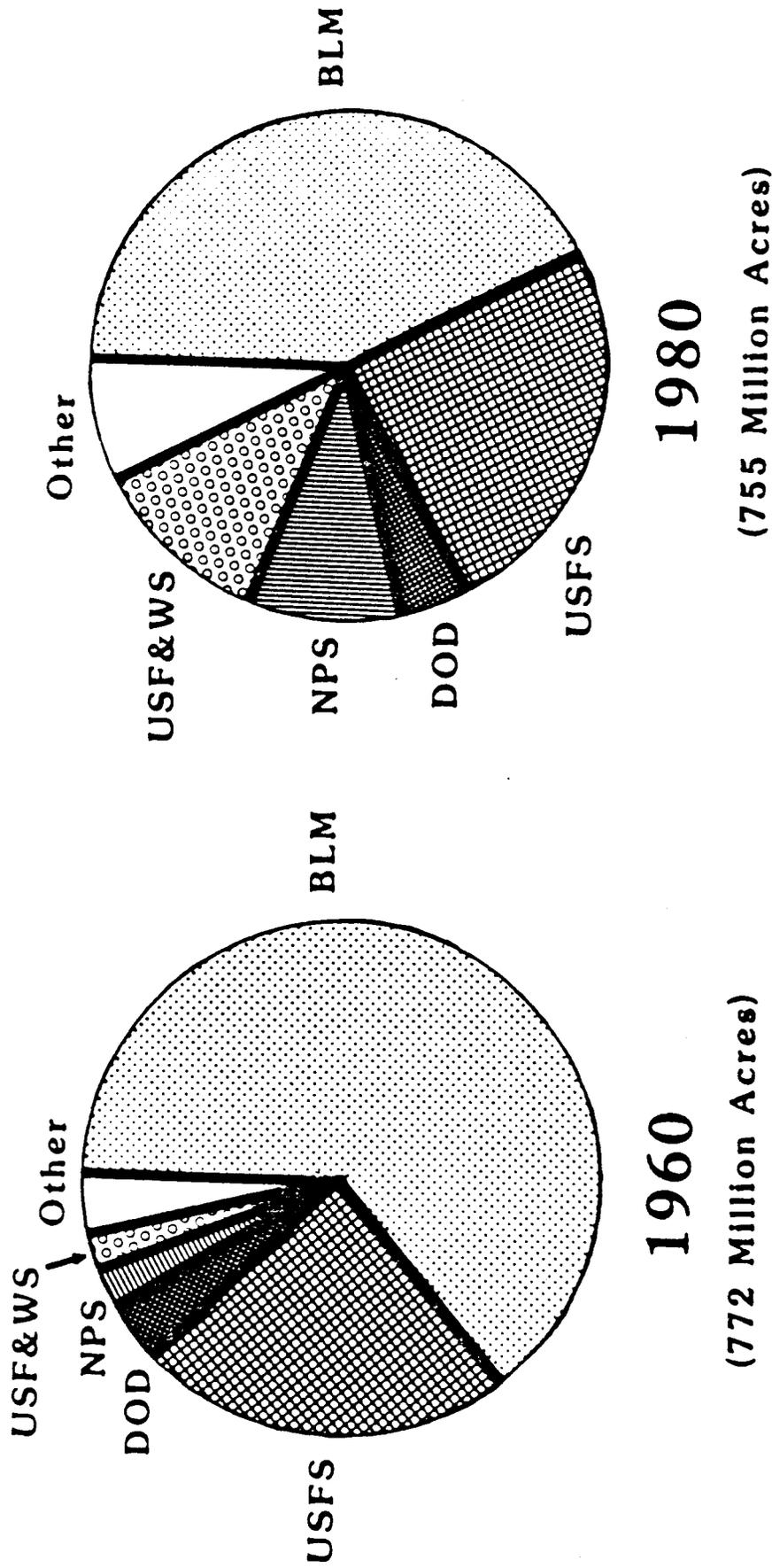


Figure 5.--Federal outdoor recreation expenditures
(1967 dollars)



**Figure 6.--Federal land ownership by agency,
1960 and 1980**

Regional distribution of public recreation land, on either a total acreage or per capita basis, especially Federal land, relative to the population is still unbalanced between the West and East, as it was in 1960 (ORRRC 1962a). The heavily populated Northeast has relatively few acres of public recreation land, while the more sparsely populated West, particularly Alaska, has an abundance of public land available for recreational use (Figure 7). This disparity is particularly large for the acreage in wilderness areas. The regional balance has been improved since 1960 in part through land acquisition, but more effectively by population shifts from the Northeast to the South and West. The population grew 50 percent in the Pacific Census Region and 66 percent in the Rocky Mountain Census Region between 1960 and 1980 (Table 4). On the other hand, population growth in the North Central subregions was 12 and 15 percent. State and Federal recreation area in the Western Region grew 4.9 million acres, while the North Central acreage grew only 3.4 million (ORRRC 1962).

Several of the programs for which ORRRC was at least partly responsible have been directed toward acquisition and designation of Federal land for recreation. Through the Land and Water Conservation Fund, some 2.7 million acres of Federal recreation land have been acquired at a cost of \$2.6 billion. Overall, 12.6 million acres of Federal and state land have been acquired and/or designed for public recreation use in the last 20 years (ORRRC 1962a).

As a result of 1964 legislation, nearly 80 million acres of wild lands are now protected within the National Wilderness Preservation System (USDA Forest Service 1982). However, over 70 percent of these acres are in Alaska, and do not represent effective supply of wilderness recreation opportunity for most Americans (Table 5).

Twenty-eight rivers or river segments totaling almost 2,400 miles have been preserved in the National Wild and Scenic River System created by Congress in 1968 (National Park Service 1982b). In addition, some 165,000 miles of recreational trails are being maintained by Federal, state, and local agencies (USDA Forest Service 1982; National Association of Conservation Districts - no date). Most of this mileage existed in 1960 as administrative trails, but improved maintenance, design and signing have greatly improved the effectiveness of these trails as a recreational resource.

Since ORRRC, the National Park System has tripled to 335 units and 77 million acres (Diamond, et al. 1983). Also, a number of new National Recreation Areas have been developed within an easy drive of metropolitan areas.

The condition of developments and facilities within the National Park System is a continuing concern. The Secretary of the Interior asked for \$96.5 million for fiscal year 1983 for the second installment of the Administration's five-year Park

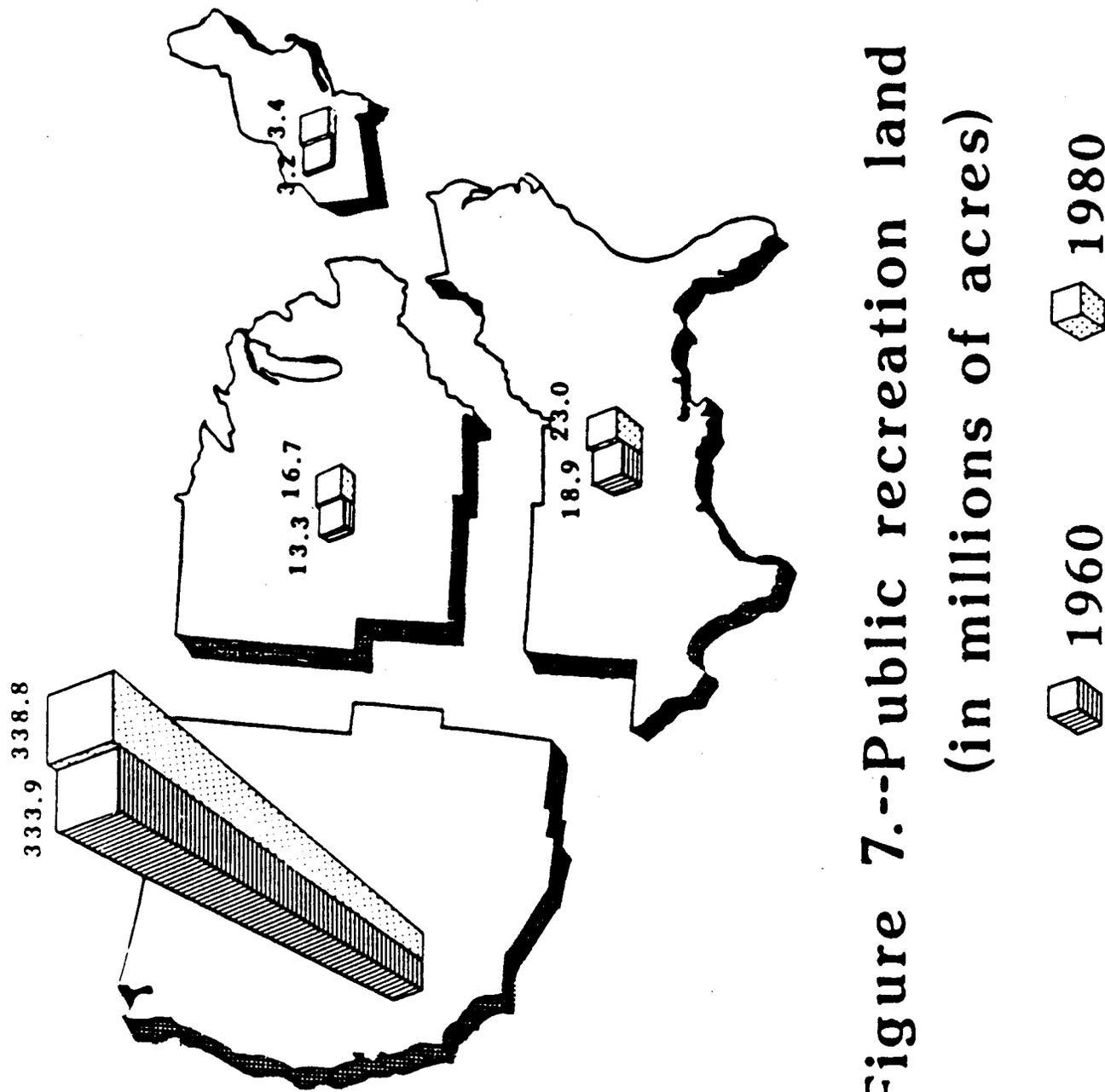


Figure 7.--Public recreation land
 (in millions of acres)

Table 4.--Growth of Federal and state designated public recreation acreage and population growth by region, 1960 to 1980.

Region	Acreage			Proportional change	
	1960	1980	Increase	Acreage	Population
	--Millions of Acres--			--Present--	
New England	1.8	1.9	0.1	5	17
Mid-Atlantic	1.4	1.5	0.1	10	8
E. No. Central	6.0	7.1	1.1	19	15
W. No. Central	7.3	9.6	2.3	32	12
So. Atlantic	9.3	11.6	2.3	24	42
E. So. Atlantic	4.2	4.9	0.7	16	22
W. So. Atlantic	5.4	6.5	1.1	21	40
Mountain	250.3	251.9	1.6	1	66
Pacific ^a	<u>83.6</u>	<u>86.9</u>	<u>3.3</u>	<u>4</u>	<u>50</u>
Total	369.3	381.9	12.6	3	26

SOURCE: 1960 acreage from ORRC, Outdoor Recreation for America, Washington, D.C., Government Printing Office, 1961; 1980 acreage from National Park service, Recreation Resources Development Division. 1982. Public Recreation Acreage Growth and Distribution in the Past 20 Years. Unpublished data exchange report. 4 pgs.

^aExcludes Alaska

Table 5.--Acreage of the National Wilderness Preservation System by location, managing agency, and year.

Managing agency	<u>Contiguous States and Hawaii</u>			<u>Alaska</u>	<u>United States</u>
	(1964)	(1979)	(1981)	(1981)	(1981)
	(Millions of acres)				
Forest Service, USDA	9.1	15.3	19.7	5.4	25.1
National Park Service, USDI	0.0	2.8	3.0	32.4	35.4
Fish and Wildlife Service, USDI	0.0	0.7	0.6	18.7	19.3
B. of Land Management, USDI	<u>0.0</u>	<u>0.0</u>	<u>0.01</u>	<u>0.0</u>	<u>0.0</u>
TOTAL	9.1	18.8	23.31	56.5	79.8

SOURCE: U.S. Department of Agriculture, Forest Service, Wilderness Fact Sheet (unpublished), February 1982. 1 p.

Rehabilitation and Improvement Program to build and repair park facilities. Sharing this concern, the House of Representatives in 1982 approved a Park Protection and Resources Management act aimed at safeguarding the National Parks' natural and cultural resources (Diamond, et.al. 1983).

There is a \$3 billion backlog in the purchase of Federal parks and recreation lands authorized by Congress since 1960. These authorizations represent proposed new National Parks, additions to established parks, and the acquisition of private holding within designated wildernesses for which no funds have been appropriated by Congress. In recent years, actual appropriations for acquisition have not kept pace with inflation-driven rises in the price of land (Figure 8).

Overall, the above supply trends show an increase in the supply of Federal outdoor recreation acreage in the two decades since ORRRC. However, some changes are beginning to warrant attention. As a result of recession and more generally of persistent fiscal deficits for operating government, Federal, state and local agencies are retreating from providing some forms of public outdoor recreation opportunities. At the Federal level, this has meant a drastic retreat in constant dollar funding for outdoor recreation declined from \$718 million in 1978 to \$374 million in 1982 (Executive Office of the President 1960, 1970, 1978, 1982; Bureau of Economic Statistics, Inc. 1982). With reduced funding, Federal agencies are closing some sites, reducing development and management programs, depending more on volunteers, and reducing professional management staffs.

The number of camping and picnic areas in National Forests dropped from 6,855 in 1970 to 6,328 in 1980; organized camps fell from 564 in 1970 to 518 in 1980. The Corps of Engineers reduced its annual development of new recreation areas from 1,454 acres between 1963 and 1966, to 34 acres between 1970 to 1982 (Figure 9). The Corps closed or partially closing over 400 recreation sites during fiscal years 1982 and 1983 (Lewis 1982). The purchase of new Federal recreational land has been frozen since 1980. These and other actions represent a change in involvement of the Federal government in outdoor recreation supply. Results include increased emphasis in private enterprise involvement as cooperators and concessionaires and more emphasis on dispersed recreation and less on developed recreation.

State and Local Outdoor Recreation Supply

State and local lands are geographically better distributed than Federal lands relative to population concentrations. There have been modest increases in acreage of state park system in almost all states in the last 20 years, but there has been an even larger increase in visits to state parks (Figure 10).

At the time of ORRRC, state agencies owned 84 million acres, 32 million of which were designated for recreational use. Currently, states own almost 97 million acres, 13 million more

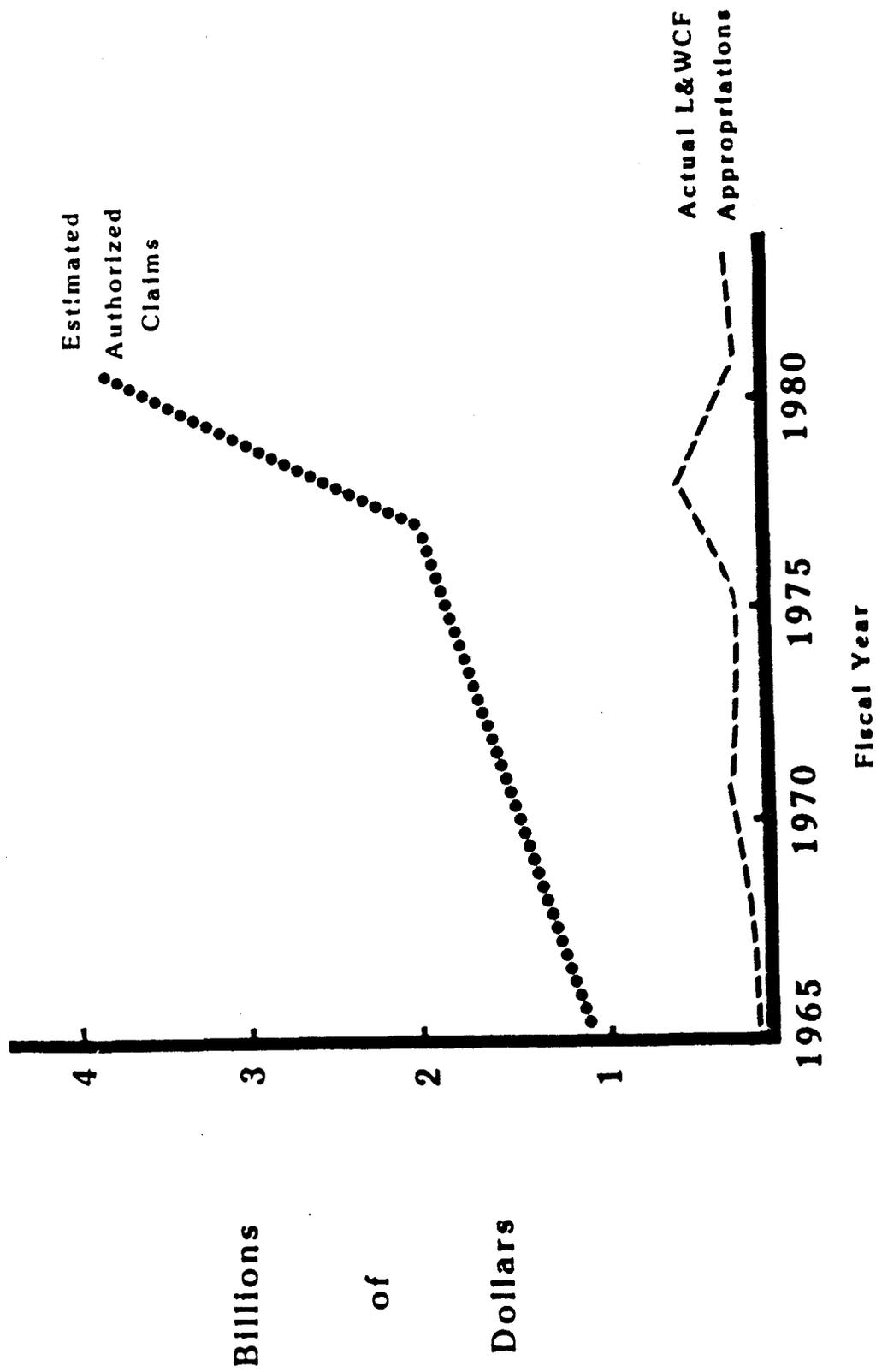


Figure 8.--Land and Water Conservation Fund claims and appropriations, 1965 to 1980

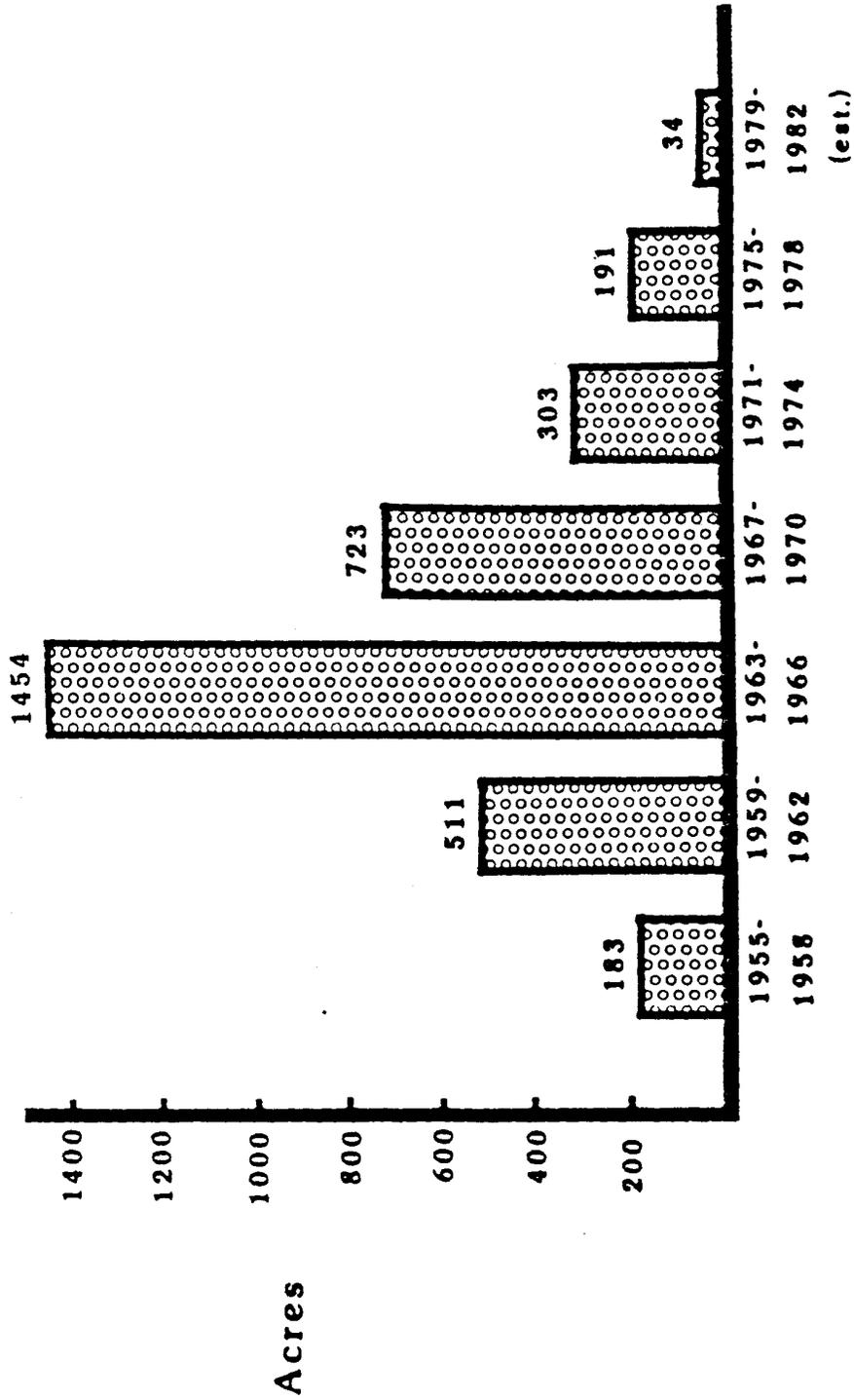


Figure 9.--Acres of new Corps of Engineers recreation areas

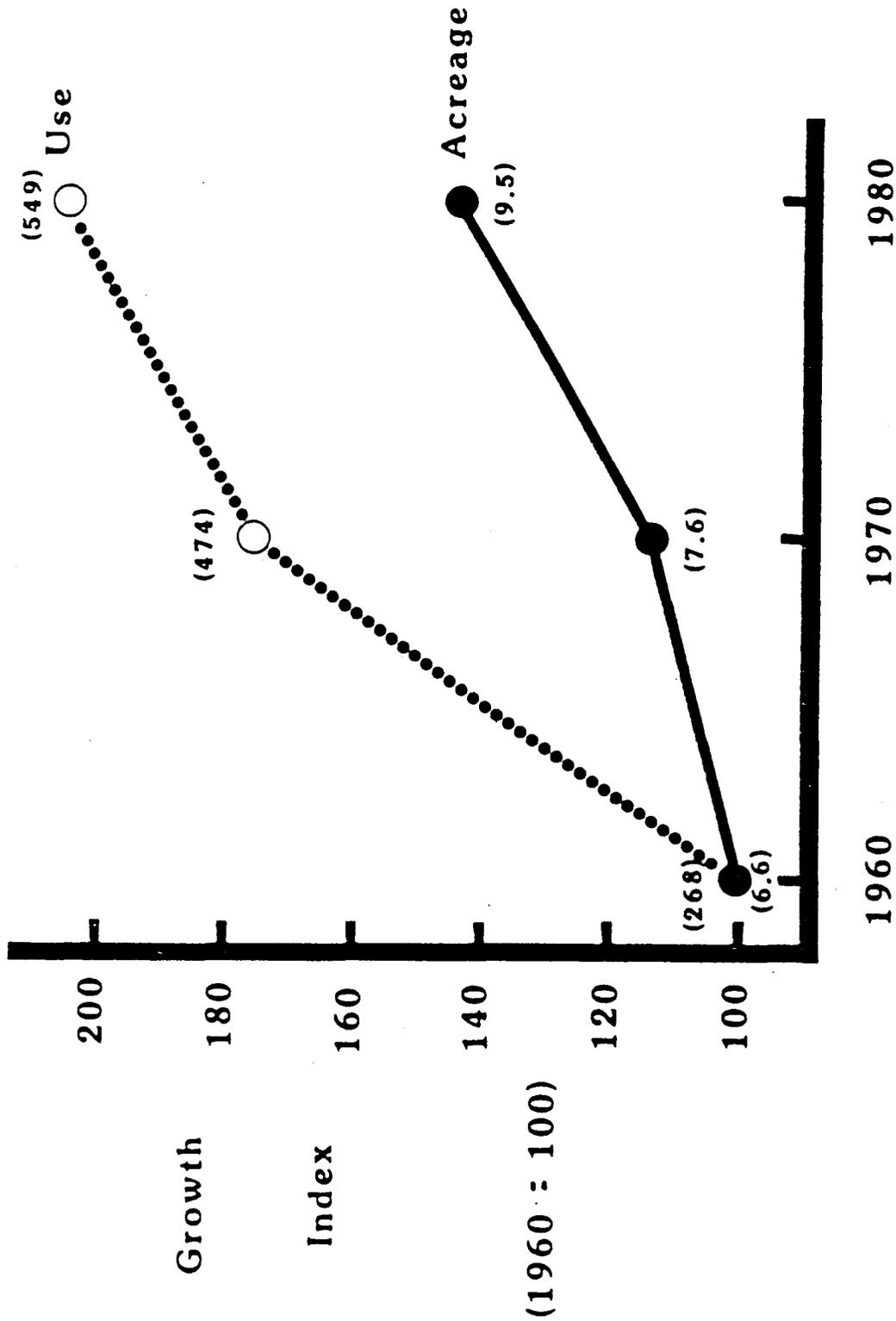


Figure 10.--State park system growth

than in 1960. Between 1960 and 1980, about 2.9 million acres of new areas were added to state park systems (National Association of State Park Directors 1980). This growth was stimulated in part by Land and Water Conservation Fund matching grants. Use during this period increased from 268 million visits in 1960 to 474 million visits in 1970 and 549 million in 1980. These trends represent a 20-year growth of 44 percent in acreage relative to growth of 105 percent in use of these state park systems.

Local government is another important source of outdoor recreation opportunity. City government expenditures are about five to six times that of either Federal or state governments for park and recreation acquisition, facilities development, operations, and services (Cordell et al. 1982). Most city and county outdoor recreation facilities lie within a 25-mile radius of the populations they serve.

In 1960, city, county and other local government entities had designated an estimated 2,560 non-urban outdoor recreation areas totaling over 3.5 million acres (Table 6). Two-thirds of these areas were picnic areas or campgrounds. By 1970 the number of picnic grounds, campgrounds, winter sports sites, and swimming and beach areas had grown to almost four times the 1960 total (Table 7, National Recreation and Parks Association 1971). From 1960 to 1980, the number of municipal and county parks and recreation areas increased 82 percent from 17,142 to 31,235 (National Association of State Park Directors 1980). Acreage owned by local governments (including non-recreational areas) grew from 18 million in 1960 to over 39 million in 1980, a 117 percent growth.

State, county, and municipal governments are facing some of the same fiscal pressures that face the Federal government. Slow growing tax revenues and severely reduced Federal assistance and grants programs are slowing acquisition, development, and service programs.

Private Outdoor Recreation Supply

Private lands and private enterprise have always provided a major, if not dominant, portion of the United States outdoor recreation supply. The total private land base in the United States is about 1.35 billion acres. This land and private capital are thought to be one major source of future supply of outdoor recreation as government is having to redefine and reduce its supply role. Some government agencies have reduced their commitment for recreation, agencies assuming that the private sector would increase recreation investment.

In 1977, about one-third of the private forest and range lands in the United States was open for public recreational use (Cordell, et.al. 1978). Almost 68 million acres of industrial forest lands, 58 percent, was open for public use in 1977. In 1960, however, an estimated 97 percent of forest industry land was open for public fishing and 92 percent was open for hunting

Table 6.--Median acreage per city of reserved open space, developed recreational land, and total acreage provided by U.S. cities, 1975.

Population of city	Median number of acres per city ^a		
	Reserved open space	Developed recreat- ional land	Total recreat- ional land
All cities	70.0	100.0	197.9
Over 500,000	8,971.5	4,680.9	9,200.0
250,000 - 500,000	1,020.1	1,900.0	3,371.8
100,000 - 249,999	250.0	813.5	1,175.0
50,000 - 99,999	110.0	288.0	403.0
25,000 - 49,999	65.0	152.0	272.8
10,000 - 24,999	40.0	60.0	114.0

SOURCE: National Recreation and Park Association, 1976. Acres of land for parks and recreation, Parks and Recreation 11(7):27.

^aFrom 1,123 cities responding to a survey of cities in the U.S. with 10,000 or more population conducted by the National Recreation and Parks Association and the International City Management Association in 1975.

Table 7.--Number and percentage growth of nonurban outdoor recreation facilities provided by local governments in the United States, 1960 and 1970.

Facility Type	1960	1970a	Growth
	Number		Percent
Swimming beaches	147	628	327
Winter sports sites ^b	106	978	823
Picnic grounds	1,728	8,925	416
Campgrounds	<u>274</u>	<u>472^c</u>	<u>72</u>
Total	2,255	11,003	388

^aAreas provided by either municipal, county, special district, multiple jurisdiction, school, or other local government, where nonurban is defined as outdoor, not lighted, as reported in Parks and Recreation Magazine, Vol VI. No. (8):28-31.

^bIncludes ice skating natural, ski centers, toboggan slides, and snowmobile trails.

^cOne-hundred and ninety-eight tourist/trailer camps and 274 overnight, organized camps.

(American Forest Products Industries 1960). Apparently, some 23 million acres of industrial forest land were closed to the public over this 20-year period. Closure of non-industrial lands since 1960 may have been even more drastic.

Almost 1.5 million acres of forest and range land (most of it privately owned) are converted each year to urban and other development and thus are no longer available to the general public for traditional outdoor recreation use. Forest land conversion alone totals an estimated 0.8 million acres per year. Loss of forest and range land is only a part of a larger conversion of more than 3 million acres per year of agricultural, forest, and range land to urban transportation, water, and other "built-up" uses (SCS 1978). This represents an approximate total of about 55 million acres converted since 1960. Since 1940, the rate of this conversion (mostly development) has been accelerating (Figure 11).

The implication for recreation supply is that less land base may be available for traditional outdoor recreation, such as hunting, hiking, and camping. More area should be available for water and development-oriented recreation because much of the conversion has been for water projects, transportation corridors, and residential areas.

A decline, or at least a shift, in private outdoor recreation supply is further indicated by a variety of other data. The nationwide total number of private campgrounds has declined an estimated 23 percent since 1973. Between 1960 and 1973, there was a dramatic increase in private campgrounds from under 1000 to more than 8000 (Table 8). Since 1973, the number of private campgrounds is estimated to have fallen by almost 2,000.

Recreational access to coastal shoreline has also been decreasing rapidly since the early 1960s as development of shoreline for exclusive private use continues. In 1960 an estimated 21,000 miles had been designated as available for public use (ORRRC 1962e). In 1980, it was estimated that less than 5000 miles of private shoreline were open for public use (Table 9). Beach erosion is also becoming a significant factor in that it is estimated that one-fourth of the U.S. shoreline is undergoing significant erosion and threatening shoreline development. In the 1960s and 1970s, subsidized Federal assistance became more available to arrest erosion. Development and therefore greater closure of shoreline was encouraged. As this assistance is currently being withdrawn, development risk costs to private developers are rising and may act to slow development and closure of public access to shoreline.

Other indicators reveal private supply growth. Acreage of farm ponds increased almost 70 percent between 1960 and 1978 (Table 10). Golf facilities increased 88 percent between 1960 and 1980; 85 percent of this investment was private, 15 percent was municipal and local government (Cordell et al. 1982). An

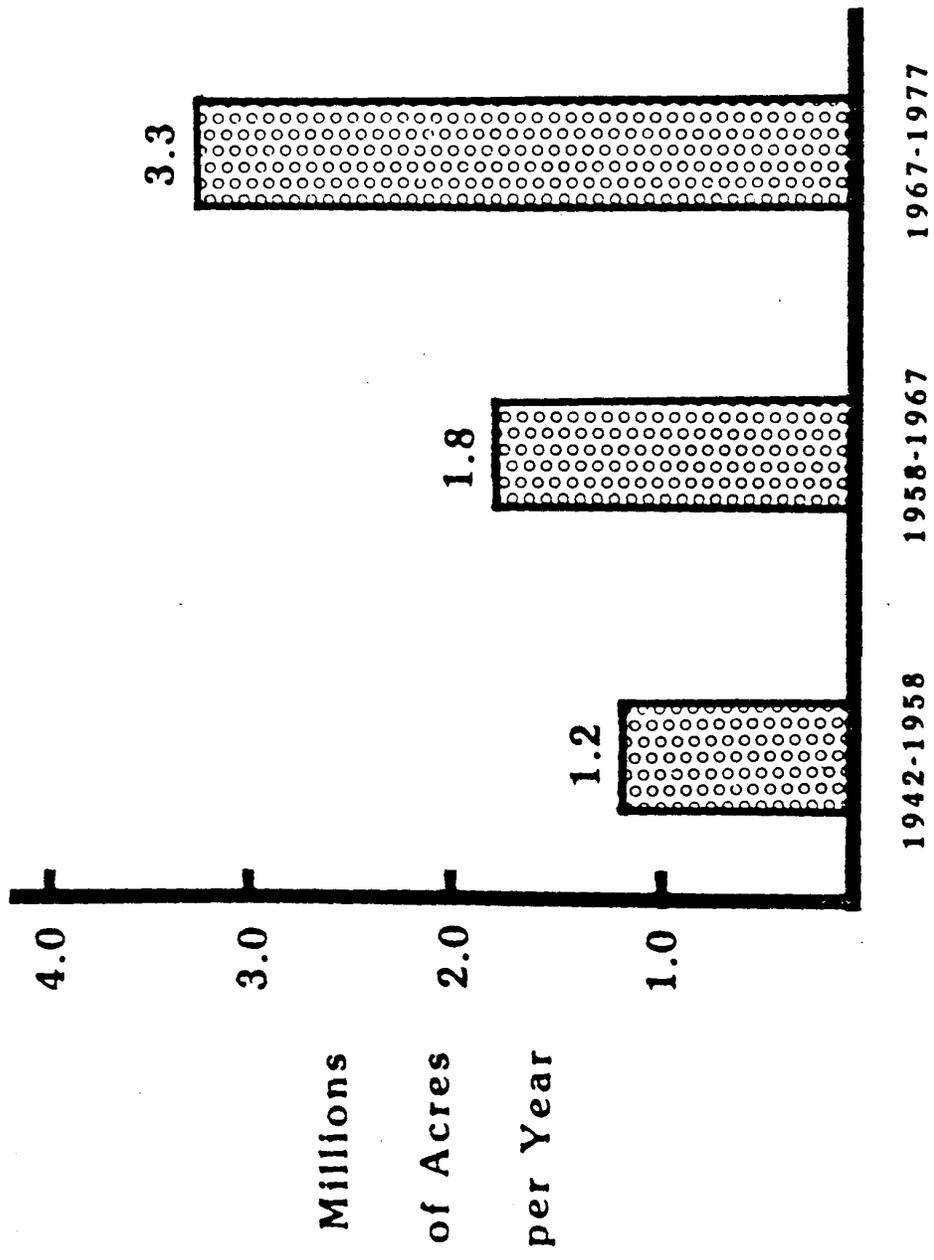


Figure 11.--Annual rate of conversion of land to nonagricultural uses, 1942 - 1977

Table 8.--Number and percentage growth of campgrounds in the United States by ownership, 1960-1981.

Ownership	1960 ^a	1973	1981	Average annual percent change 1960-1981	Percentage change since 1973
	- - - - - Number - - - - -			- - - Percent - - -	
Public	6,612	7,495	7,769	0.8	+ 3.6
Private	<u>425</u>	<u>8,267</u>	<u>6,385</u>	<u>66.8</u>	<u>-22.8</u>
Total	7,037	15,762	14,154	4.8	-10.2

SOURCES: ORRRC Report No. 1, p. 28, Table 22 (for 1960 public data); ORRRC Report No. 11, p. 18, Table 7 (for 1960 private campground data); USDA Forest Service, An Assessment of the Forest and Range Land Situation in the United States, Washington, D.C.: Government Printing Office, 1980, p.26, Table 3.8 (for 1973 data); Rand McNally and Company, Campground and Trailer Park Guide, Stokie: Rand McNally and Company, 1982 (for 1981 data).

^a1960 Figures do not include data for Alaska and Hawaii.

Table 9.--Miles and percentage of recreational shoreline in the United States by ownership, 1960 and 1971.

Ownership	1960		1971		Change 1960-1971
	Miles	Percent	Miles	Percent	Miles
Private	20,971	96.5	5,800	63	-15,171
Public	<u>753</u>	<u>3.5</u>	<u>3,400</u>	<u>37</u>	<u>2,647</u>
Total ^a	21,724	100.0	9,200	100	-12,524

SOURCE: ORRRC Study Report No. 4, Shoreline Recreation Resources of the United States, p. 10-11 and U.S. Army Corps of Engineers, National Shoreline Study, 1971.

^aSome of the differences in total recreation shoreline mileage between 1960 and 1971 may be due to definitional differences. In 1960, ORRRC considered all shoreline with a marine climate, an expansive water view of five miles, location on a water boundary not entirely within the U.S. land boundaries, and accessible to the public as recreational shoreline. The Corps of Engineers definition in 1971 focused on shoreline "open for public use." Nevertheless, for issue identification and planning purposes, it is desirable to compare perceived amounts of recreational shoreline between the two time periods.

Table 10.--Surface acres of farm ponds in the United States by region, 1960 and 1978.

Region	1960	1978	Change 1960-1978
	- - - - Acres - - - -		Percent
North	232,500	510,615	119.6
South	1,072,500	1,562,753	45.7
Rocky Mountains and Great Plains	247,500	506,710	104.7
Pacific Coast	<u>10,000</u>	<u>67,981</u>	<u>579.8</u>
U.S. total	1,562,500	2,648,059	69.5

SOURCE: ORRRC report No. 7, p. 38-42; USDA Soil Conservation Service, 1980 Appraisal Part I - Soil, Water, and Related Resources in the United States: Status, Condition, and Trends Washington, D.C.: Government Printing Office, 1979 p. 280, Table 79.

important potential growth area in private recreation supply is concessionaire operations on public land. Both the Forest Service and National Park Service are expanding programs to provide more concessionaire operations.

In addition to providing significant land resources, the private sector has been primarily responsible for the variety of new outdoor recreation products and concepts. These include innovative high-technology equipment ranging from hang gliders to off-road recreational vehicles; new consumer-oriented technologies such as video games and home computers; and new marketing concepts for leisure investments such as time-sharing vacation homes and condominiums, and high-risk adventure travel packages.

OBSERVATIONS AND CONCLUSIONS

We have come a long way toward improving the quantity, quality, diversity and service of outdoor recreation in the United States. On the surface, it seems that we need only to increase and improve this same delivery system to meet increasing public demand. But the general growth and improvements observed between 1960 and now may be somewhat misleading. Changes that started in the mid to late 1970s are continuing.

We have five general observations to offer regarding trends in outdoor recreation:

(1) Overall, participation in and spending for outdoor recreation are still growing and should continue to grow.

(2) But the annual rate of growth is slowing for traditional, resource-based outdoor recreation. American lifestyles and tastes for outdoor recreation seem to be shifting and becoming more diversified. Demand for some traditional outdoor recreation activities (sightseeing, swimming, fishing, etc.) do not appear to be growing as fast as they once did; participation in other less traditional activities (jogging, bicycling, video games, high-risk recreation activities, etc.) are rapidly claiming an increasing market share; and some activities are showing actual declines in numbers of people participating (picnicking, driving for pleasure, motor boating, water skiing, hunting, etc.).

(3) Participation and spending for tourism and outdoor recreation are shifting South and West, but regional imbalances between supply and demand still persist.

(4) Governmental supply of many forms of outdoor recreation opportunities has ceased to grow. This lack of growth is partly because of budget deficits and partly because of policy changes. Also, government agencies do not appear to respond rapidly to emerging changes in demand.

(5) The private sector does not seem to be responding to governmental retreat as had been expected. Without substantial change in the way the government and private sectors interface, these voids may remain.

Recreation demand by all indications will continue to grow as it has since 1960, but growth rates will probably be slower and in somewhat different directions. Numbers of visitors and amount of use of some Federal lands have leveled out in the last four years. The rate of growth of spending on tourism has also declined. But participation in arcade video game playing is up. At the same time, public interests in physical fitness and technology are increasing. These and other signals indicate some rather important changes in outdoor recreation consumption.

Many of the suppliers of traditional resource-based outdoor recreation are assuming that participation will continue to grow at the 1960 and early 1970 rates. This assumption could lead to serious overestimates of the future markets for some forms of outdoor recreation. Rates of growth for traditional outdoor recreation are falling and there is evidence that this trend may be more than cyclical. In some cases, levels of participation are falling. What seems to be happening is slower growth to no growth in some of the traditional outdoor recreation activities, while physical fitness, high risk, highly specified and other less traditional activities accelerate.

Since 1978 Federal expenditures for outdoor recreation have fallen drastically. In 1982 the level of dollar expenditures adjusted for inflation were back to the level of the early 1970s. State and local governments are also reducing funding, personnel, and services. Many government operations now depend in part on volunteers. In 1982 the National Park Service used 12,000 such volunteers and the Bureau of Land Management used almost 1,400 volunteers as guides and in recreation area improvement. Some Federal and state sites are being closed. And the private sector is recovering from a sustained recession and high-cost capital.

The emergence of the Outdoor Recreation Policy Review Group in 1982 represents a reaction to deepening concerns about outdoor recreation supply. ORPRG recognized continued strong demand for outdoor recreation, but found that some of the supply gains made since ORRRC are now beginning to erode.

To a very large extent, we believe that the market and the private sector will themselves correct some of the surfacing supply problems. We fully accept that some of the Federal and state programs and facilities being cut back probably are not needed. But there exists in this country an enormous, in-place recreation resource base. We must be particularly alert to short-run, as well as long-run, consequences of not maintaining and protecting this resource base. We need also to continue to improve, and where necessary, to add to the available mix of outdoor recreation opportunities to better match changing

consumer tastes. To do so will require some changes in our recreation delivery system. Needed changes include greater decentralization, innovative revenue strategies, and flexibility in the opportunity mix provided over time.

Many of our traditional sites, areas, and facilities may have to be redesigned to meet changing needs of consumers, for example, we may want to provide physical fitness courses at National Park campgrounds to meet the needs of physical fitness buffs. Government planners and managers need to take account of the many distinct segments of the recreation market, just as commercial operators must. We must recognize explicitly that resource-based areas, such as National Parks and Forests, may not be premium recreation settings for some users.

To an extent, we should go back to some of the concerns and needs focused upon by ORRRC as well as by its predecessor, the Federal Interagency Committee on Recreation (FICOR 1950). Principally, we should examine the need for redistributing some of the available opportunities to more heavily populated states and urban areas. The original ORRRC agenda for redistributing outdoor recreation opportunities is not yet complete and, as the Outdoor Recreation Policy Review Group has suggested, we need to update that agenda.

The Federal Interagency Committee on Recreation recognized as early as 1950 that the United States will face a continuing challenge in meeting recreation needs. The concerns of that group still seem to be appropriate today:

"As cities grow, more and more land is developed for residential, commercial and industrial use with a corresponding decrease in accessible natural resources of recreation value. It is only wise to make provision in advance for the open spaces and play areas needed to make urban living pleasant as well as healthful" (FICOR 1950, p. 36).

1. Recreation areas, facilities and programs so located and of such types as to meet the day, week end, holiday and vacation needs of all income groups should be provided.

2. Important and outstanding scenic areas, historic and prehistoric sites, objects and buildings, representatives of native plant and animal life, geological exhibits, scenic and historic parkways, ocean frontage and other areas that are of far more value for recreation than any other use should be secured and preserved for public enjoyment and benefit.

3. Recreation use should be recognized in all land-use planning and full consideration of

recreation resources should be given to lands managed primarily for other purposes.

4. The great importance of municipal recreation facilities and programs should be recognized.

5. The place of private enterprise in recreation developments should be given full recognition.

6. Federal, state and local recreation development and administration should be so coordinated that an orderly and efficient system of recreation areas and programs may be developed in which priorities, local and national, will be taken fully into account and administration will be by the level of government best able to meet the public needs" (FICOR 1950, p. 40).

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