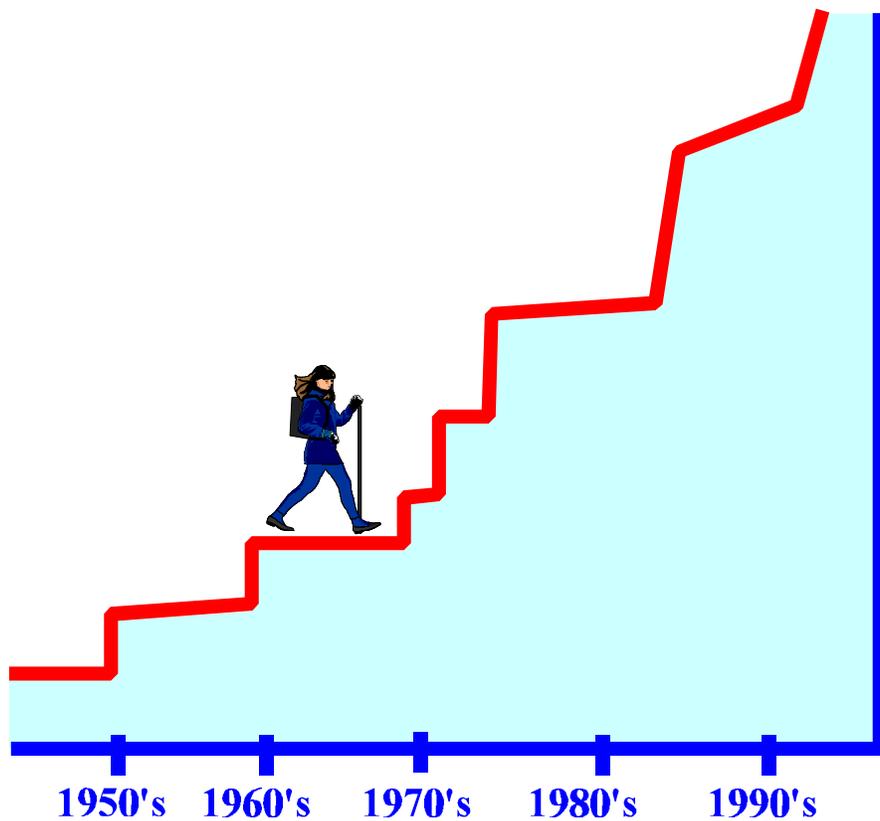


CHAPTER 1: INTRODUCTION



This report is one of a series that describes the results of the 1994-95 National Survey on Recreation and the Environment (NSRE). The emphasis in this report is on the opportunities manufacturers and retailers have to supply products, equipment, and services for outdoor recreation in the United States now and in the years ahead.

A hundred years ago, Americans realized that their Nation's rapidly expanding industrial systems were not providing satisfactory lives for factory workers. People who had grown up on farms in America and Europe found few pleasures on the crowded streets of the growing cities. One solution was for public agencies to provide recreation facilities and parks located where workers could enjoy them. Another was for private investors to provide outdoor opportunities and services at prices workers could afford. Results of government efforts include public parks, beaches, and forests. Results of private efforts include sporting events, private resorts and facilities for outdoor recreators, information and travel services for tourists, and a wide variety of products and services designed specifically for outdoor recreation participants.

All these efforts made impressive improvements in the quality of the lives of American workers. And the resulting profits were equally impressive. A hundred years ago, who would have dared to predict the huge public interest in professional sports by the end of the 20th century? Who would have guessed that professional athletes would be among the Nation's best-paid employees? It would have taken amazing imagination to see how important recreation would become.

Predicting demands for recreation goods and services has not become easier. Some see outdoor recreation as a mature industry with slowing growth potential. The findings from the NSRE point to a more promising, growth oriented future for outdoor recreation in the years ahead.

There are two primary indicators for this optimism. The first is that the NSRE finds that 19 out of 20 Americans over the age of 15 already participate in some form of outdoor recreation. It also shows that participation tends to increase as income increases, up to a point. Although the kind of participation varies widely, the NSRE shows that the U.S. is still a nation of individuals who enjoy the outdoors.

The second reason for optimism is that we see a growing psychological need for recreation in natural settings. Increasingly, the professional and personal lives of Americans are dominated by images on computer monitors and television screens. We expect people increasingly to seek natural, outdoor settings for their leisure activities. Because outdoor activities provide a sense of vitality that is not available indoors, many people attach special importance to outdoor activities. Some Americans already prefer to think of themselves as tennis players, golfers, hikers, and fishers rather than as accountants, lawyers, sales agents, and computer operators.

Since the factory system was introduced into Western culture, outdoor recreation has been helping people to refresh and renew themselves. It has been as vital to managers as to factory workers. There is every reason to believe that recreation will be even more

important in a world dominated by the virtual reality of the World Wide Web.

Survey Methods

The 1994-95 NSRE was conducted to discover and describe: (1) participation by Americans in outdoor recreation activities, (2) favorite activities and constraints on participation in them, (3) uses and values of wildlife and wilderness, (4) attitudes about recreation policy issues, (5) outdoor recreation patterns and needs of people with challenging and disabling conditions, and (6) recreational trips people take away from home. NSRE data will be used by a variety of public and private organizations for various purposes. The emphasis in this report, of course, is on emerging markets for private investors and on human powered activities.

The NSRE survey was comprised of two random-digit-dialing (RDD) telephone surveys. In the first survey, with a target sample of 12,000 Americans above the age of 15, people were asked questions in four areas: (1) participation in activities and the numbers of days and trips spent in recreation activities, (2) the characteristics of recreation trips, (3) barriers and constraints to outdoor recreation, and (4) alternative strategies for charging user fees for recreation. The average length of interviews for this survey was 20 minutes.

In the second survey, the target sample was 5,000 Americans above age 15. People were asked about their participation in specific outdoor recreation activities and the benefits of that participation. Each respondent also was asked questions in three of five additional randomly assigned modules: (1)

favorite activities and barriers and constraints to participation in them, (2) wilderness issues, (3) wildlife issues, (4) awareness about public land management agencies, and (5) freshwater-based trips. For each of the randomly assigned modules, sample size was approximately 2,500.

In both surveys, respondents were asked if they had a disability or challenging physical condition. If the answer was positive, additional questions about accessibility of recreation areas were asked. If respondents indicated that a disabled person other than themselves lived in the home, the disabled person was contacted and interviewed at a convenient date.

Data were collected from January 1994 through May 1995. A total of 17,216 useable interviews were completed—12,214 for survey one and 5,002 for survey two. One goal of survey one was to have valid samples in each of eight regions in the United States. A minimum sample size of 900 was set for regions 1 through 7 and a minimum of 400 was set for Alaska. The Nation's population is heavily concentrated in the Northeast and the South, so individuals in these regions were proportionately under represented in the first survey¹. Samples for the second survey were based on population distribution, so almost 47 percent of the samples were in the Northeast and more than 30 percent were in the South.

¹ See page 172, figure 6.1, for a definition of United States regions as used in this report.

Sources of Error

State-by-state random digit dialing was employed to sample households across the country. This approach, however, reaches a random sample of telephone numbers, rather than of people. Affluent families are virtually certain to have a telephone number and many have more than one. At the other end of the affluency scale, many low-income households may not have a telephone. As a result, affluent people may have been over-represented somewhat in the survey sample. Demographic characteristics of the NSRE sample are compared with 1990 Census

Table 1.1.—Comparison of the NSRE survey sample with 1990 Census of Population Estimates.

Category	NSRE Proportion of Sample	1990 Census of Population Proportion
AGE		
16-24	15.1	17.2
25-29	9.0	11.1
30-39	23.9	22.0
40-49	19.6	16.5
50-59	12.8	11.5
over 60	19.5	21.8
RACE		
Caucasian	85.3	81.9
African American	6.3	11.1
American Indian	1.0	0.73
Asian Pacific islander	1.5	2.8
Other	5.9	3.4
GENDER		
Male	42.6	48.0
Female	57.4	52.0

estimates for individuals 16 and above in table 1.1. Differences in age, race, and gender were adjusted for over or under representation during data analysis.

In viewing the results presented in this report, it is important to remember that individuals were asked about their personal participation in specific recreation activities. But they were also asked about the characteristics of their households. Thus, when we report the relationship of family size to rate of participation, the percentages given represent the proportions of respondents in various sizes of households who participated in specific activities.

Activities, Singly and In Groups

Questions were asked about participation in 62 specific outdoor recreation activities. For analysis and description of results, it was useful to place these activities into 13 groups. For simplicity, each activity was placed in only one category. In many cases, however, activities could have been placed in more than one category. Bicycling, for example, was classed as a fitness activity, which it is for many people. For others, however, bicycling might best be classed as an outdoor adventure activity.

The activity groups and the individual activities surveyed were:

Fitness

Running, jogging
Bicycling
Walking

Individual sports

Golf
Tennis

Outdoor team sports

Baseball
Softball
Football
Basketball
Soccer
Volleyball
Handball

Outdoor spectator activities

Concerts
Sports events

Viewing or studying

Nature centers
Visitor centers
Prehistoric sites
Historic sites
Bird watching
Wildlife viewing
Fish viewing
Nature study near water
Sightseeing
Visiting a beach or waterside

Snow and ice activities

Ice skating
Snowboarding
Sledding
Downhill skiing
Cross-country skiing
Snowmobiling

Camping

Developed area
Primitive area

Hunting

Big game
Small game
Migratory bird

Fishing

Freshwater
Warmwater
Coldwater
Saltwater
Anadromous
Catch and release

Boating

Sailing
Canoeing
Kayaking
Rowing
Floating, rafting
Motorboating
Water skiing
Jet skiing
Sailboarding, windsurfing

Swimming

Surfing
Swimming in pool
Swimming/lake, river, ocean
Snorkeling

Outdoor adventure

Hiking
Orienteering
Backpacking
Mountain climbing
Rock climbing
Caving
Off-road vehicle driving
Horseback riding

Traditional social activities

Family gathering
Picnicking
Yard games

