

TRENDS IN OUTDOOR RECREATION AND TOURISM:

**Virginia Governor's Conference on
Greenways and Blueways, October, 2000**



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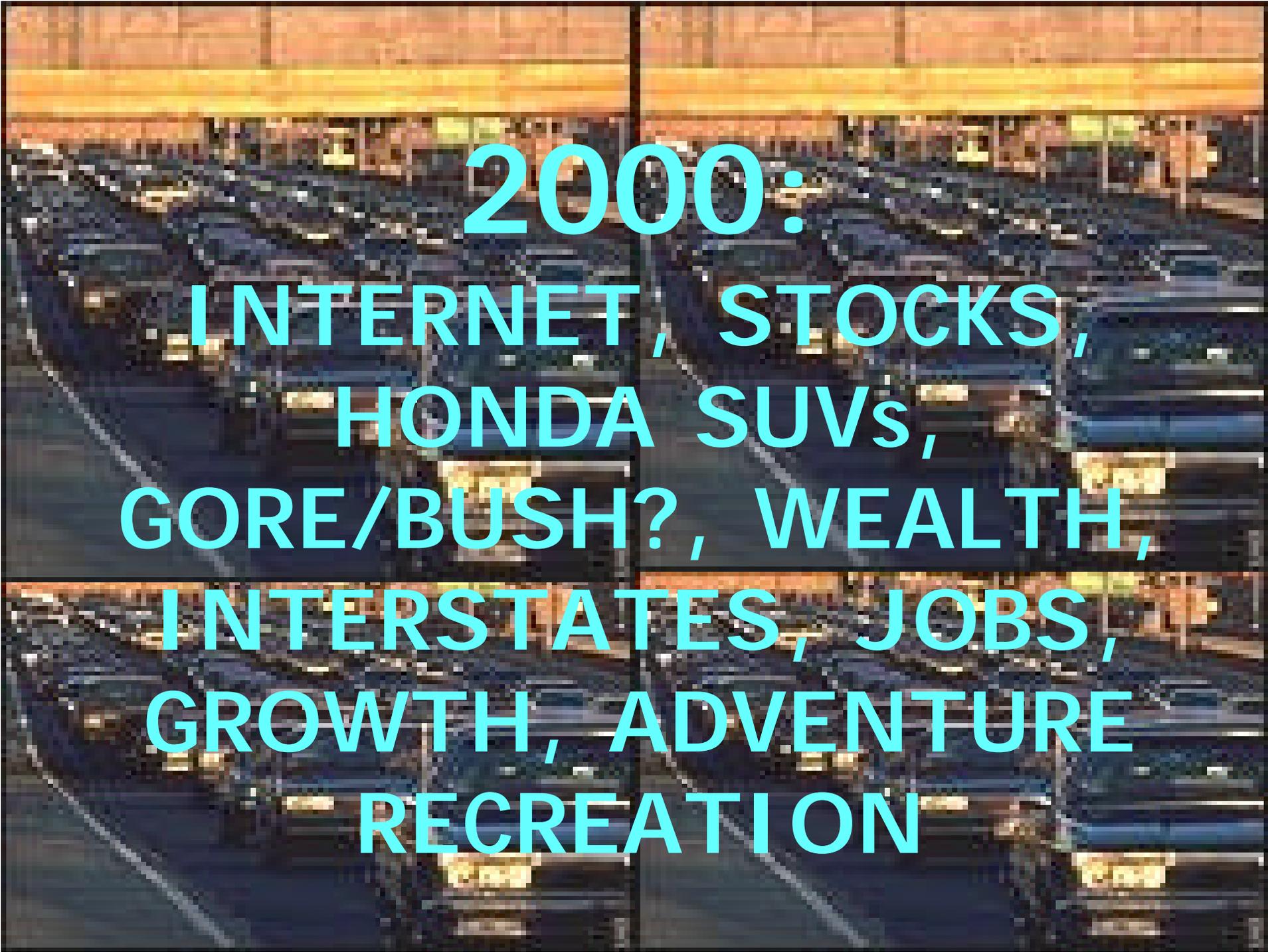
**www.srs.fs.fed.us/trends
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A Changing America

A Changing America



1960:
Flower Children,
VW Camper Vans,
Elvis and The Beatles,
Vietnam, Kennedy,
Family Vacations,
Chevy Impala V8

An aerial night photograph of a city, likely San Francisco, showing a grid of streets and buildings illuminated by streetlights. The lights reflect on the water in the foreground, creating a shimmering effect. The overall scene is dark with bright points of light from the city.

2000:
INTERNET, STOCKS,
HONDA SUVs,
GORE/BUSH?, WEALTH,
INTERSTATES, JOBS,
GROWTH, ADVENTURE
RECREATION

Demographic Percentages: 1960 and 2000

		<u>1960</u>		<u>2000</u>	
Residence in MSA		60.5		80.2	
Over 1 million		26.1		21.4	
Under 1 million		34.5		58.8	
<u>Not</u> in MSA		39.5		19.8	
Race	White	89.5		82.9	
	Non-White	10.5		17.1	
Age		<u>Male</u>	<u>Female</u>	<u>Male</u>	<u>Female</u>
All		47.9	52.1	48.4	51.6
12-17		7.3	7.0	5.3	5.0
18-24		5.3	6.2	5.9	5.7
25-44		16.6	18.1	17.9	18.2
45-64		13.4	14.3	13.0	13.8
65+		5.3	6.5	6.3	8.9

(Continued)

Demographic Percentages: 1960 and 2000



	<u>1960</u>	<u>2000</u>
Family Income (1998\$) (Note: 45.54 million U.S. families in 1960. 71.55 million families in 1998.)		
Percentiles		
20 th	14,093	21,600
40 th	24,298	37,692
60 th	32,215	56,020
80 th	44,547	83,693
95 th	68,521	145,199
Educational Attainment, Age 25 and Over		
8 th grade or less	37.5	7.4
9-11 th grade	18.5	9.7
High school graduate	27.1	33.8
Some college	9.1	24.7
College degree or higher	7.7	24.4

*CHANGING
DEMOGRAPHICS=
CHANGING
OUTDOOR
RECREATION*



In 1960

**The Outdoor Recreation
Resources Review
Commission found:
(A Baseline)**

- **“The simple activities are the most popular” – driving, walking, swimming, picnicking**
- **“Water is a focal point of outdoor recreation,” to sit by, swim in, ski across, and run boats over.**
- **“Outdoor recreation is a major leisure time activity and it is growing in importance,” 90% participated in the summer of 1960.**

In 2000

**The Forest Service
RPA Assessment
found:**



- **Outdoor recreation continues to be immensely popular, 97 percent age 16+ participate in 2000.**
- **The four most popular single activities are walking, going to the beach, family gatherings out-of-doors, and sightseeing.**
- **Almost all outdoor activities are forecast to grow in number of people participating and in travel.**



Activities Rising Fastest By Percentage (1982 to 2000) (16 or older)

	<u>% Growth</u>	<u>No. in 2000</u>
Bird watching	235.9	71.2
Hiking	195.9	73.1
Backpacking	165.9	23.4
Snow-mobiling	107.5	66.9
Walking	91.2	179.0
Off-road driving	89.2	27.9
Primitive camping	81.9	32.2
Developed camping	76.0	52.8
Downhill skiing	66.9	17.7
Swimming/river, lake or ocean	64.4	78.1



Activities Rising Slower By Percentage (1982 to 2000) (16 or older)

	<u>% Growth</u>	<u>No. in 2000</u>
Motor boating	52.9	51.4
Cross-country skiing	50.9	8.0
Bicycling	48.5	83.9
Sightseeing	40.2	114.0
Picnicking	37.5	116.6
Horseback riding	35.9	21.6
Fishing	20.6	72.5
Hunting	12.7	23.9
Outdoor team sports	10.6	46.9
Water skiing	9.4	17.4
Sailing	-0.9	10.5



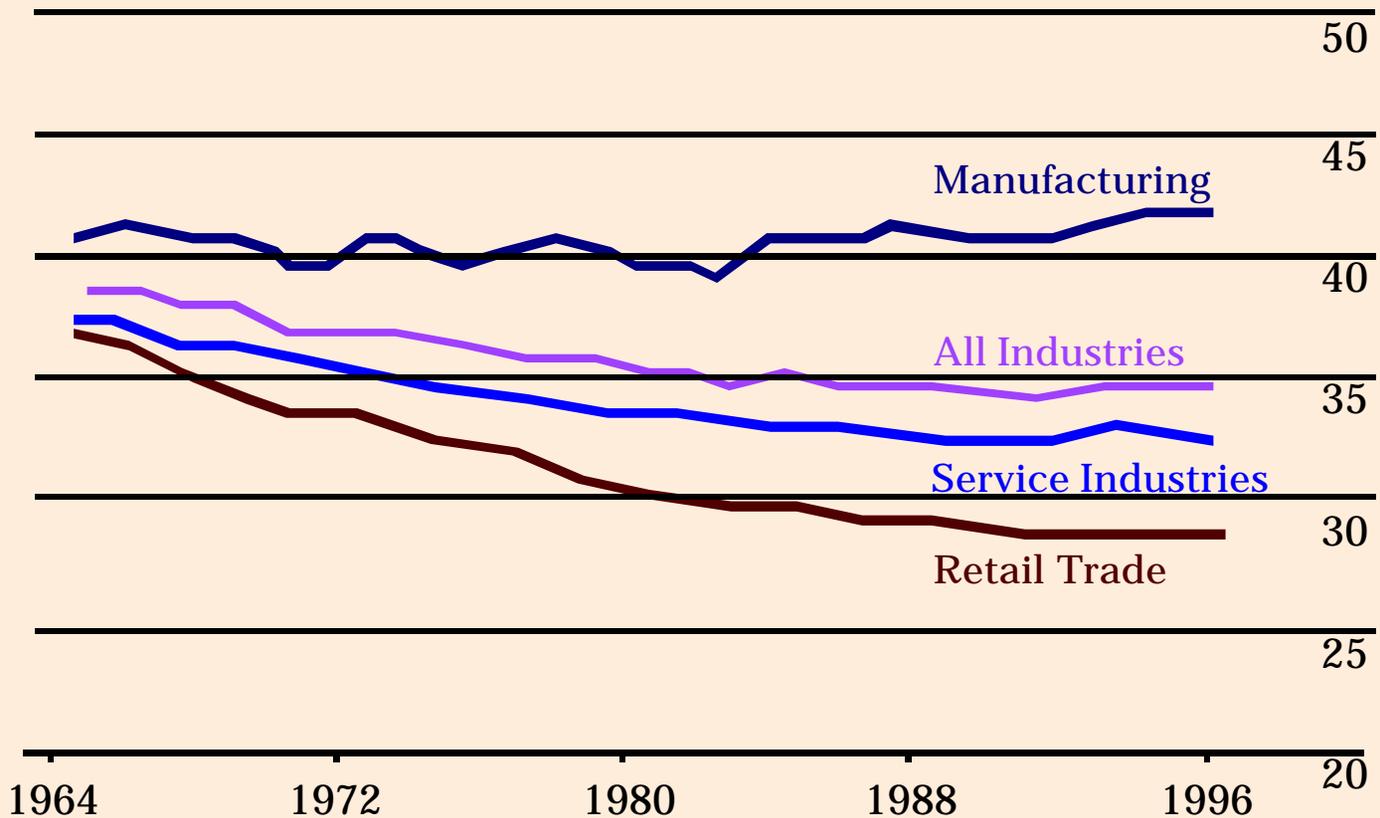
Activities Adding the Most Participants (1982-2000) (16 or older)

	<u>Millions</u>	
	<u>Growth</u>	<u>No. in 2000</u>
Walking	85.4	179.0
Bird watching	50.0	71.2
Hiking	48.4	73.1
Swimming/river, lake, or ocean	36.4	92.9
Sightseeing	32.7	114.0
Picnicking	31.8	116.6
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Developed camping	22.8	52.8
Motor boating	17.8	51.4
Off-road driving	17.3	36.7
Backpacking	14.6	23.4

Are We Having Fun Yet?

PUNCHING IN FEWER HOURS

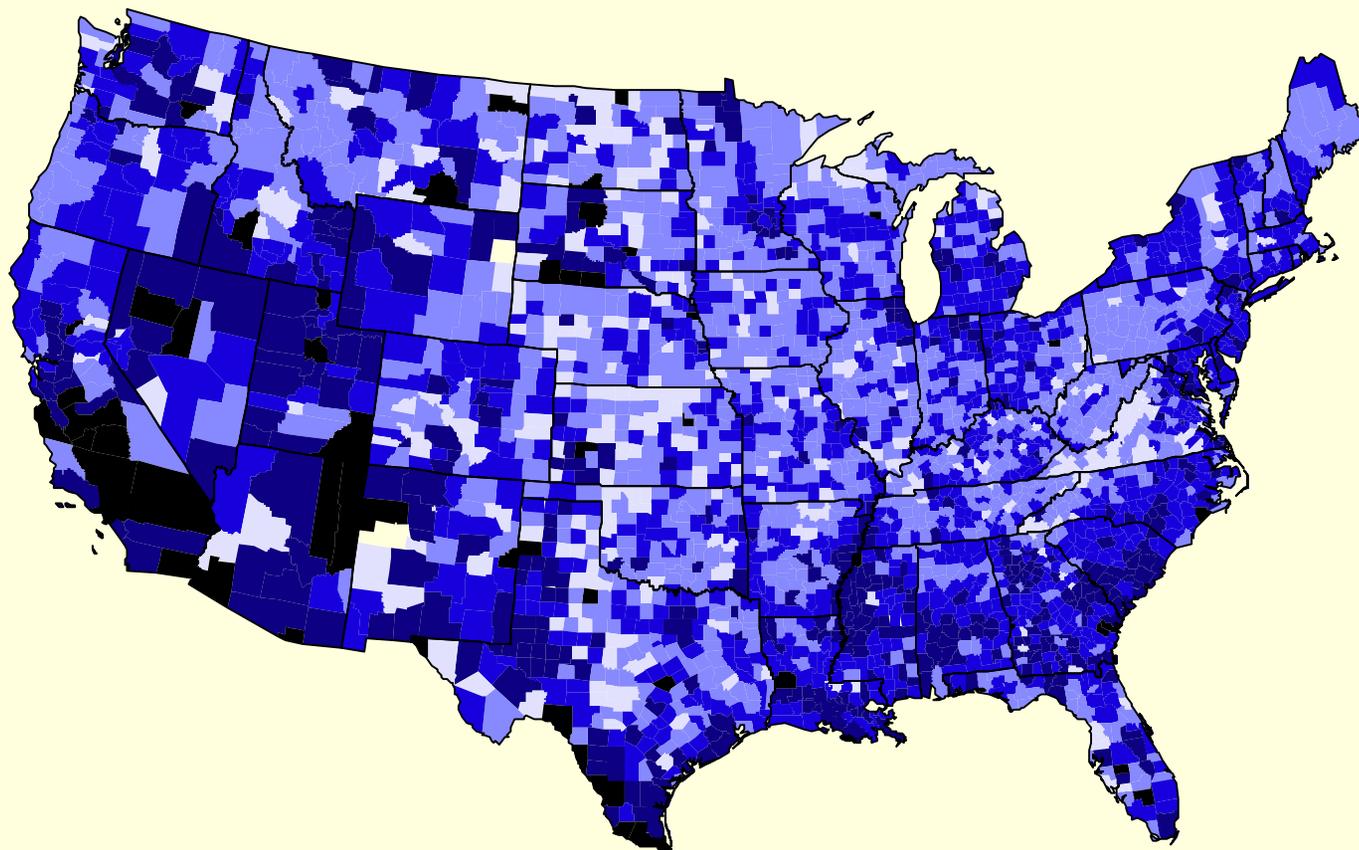
(average weekly hours worked in all industries and selected industries, 1964-96)



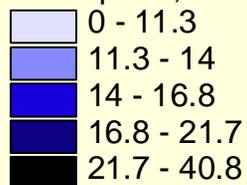
Source: Bureau of Labor Statistics

*CHANGE WILL
CONTINUE WELL
INTO THE
FUTURE*

Filling the West: Distribution of U.S. Birth Rate, 1990



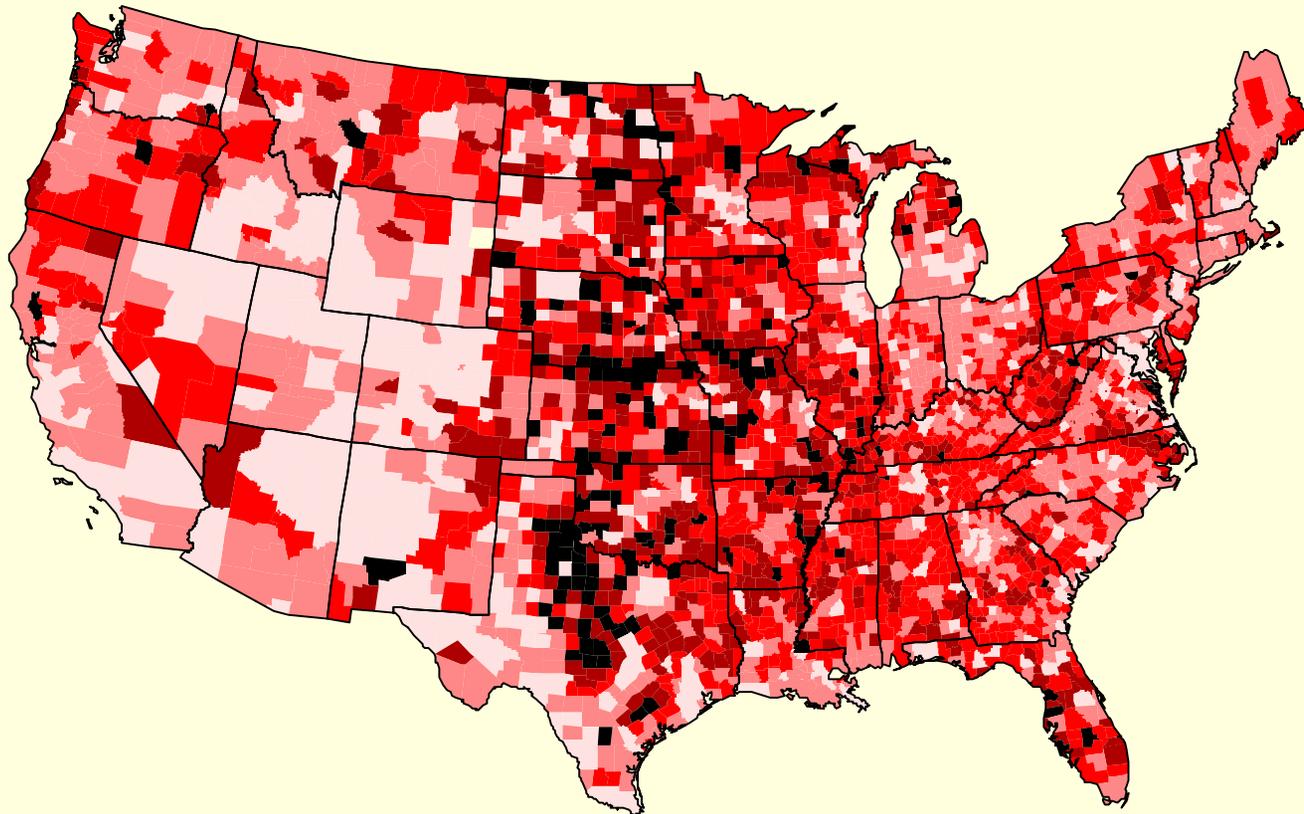
Births per 1,000 Population



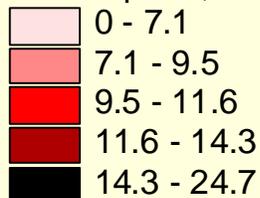
Births per 1,000 Population by
Region and Conterminous U.S.

North	15.8
Pacific Coast	19.6
South	16.5
Rocky Mountains	17.1
Conterminous States	16.7

Emptying the Midwest: Distribution of U.S. Death Rates, 1990



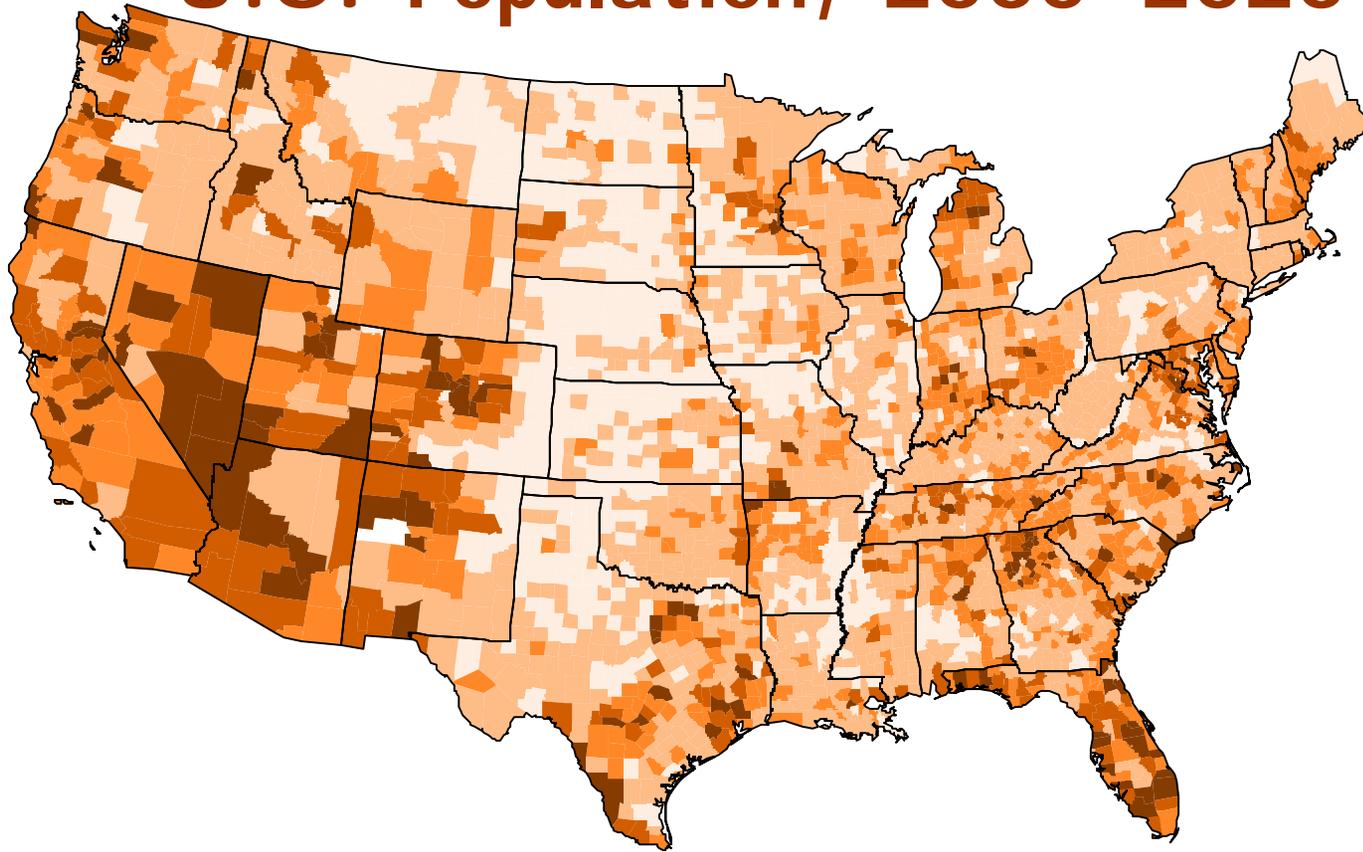
Deaths per 1,000 Population



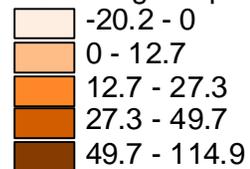
Deaths per 1,000 Population
by Region and Conterminous U.S.

North	10.2
Pacific Coast	8.9
South	10.2
Rocky Mountains	9.8
Conterminous States	10.1

The Geography of Projected Change in U.S. Population, 2000-2020



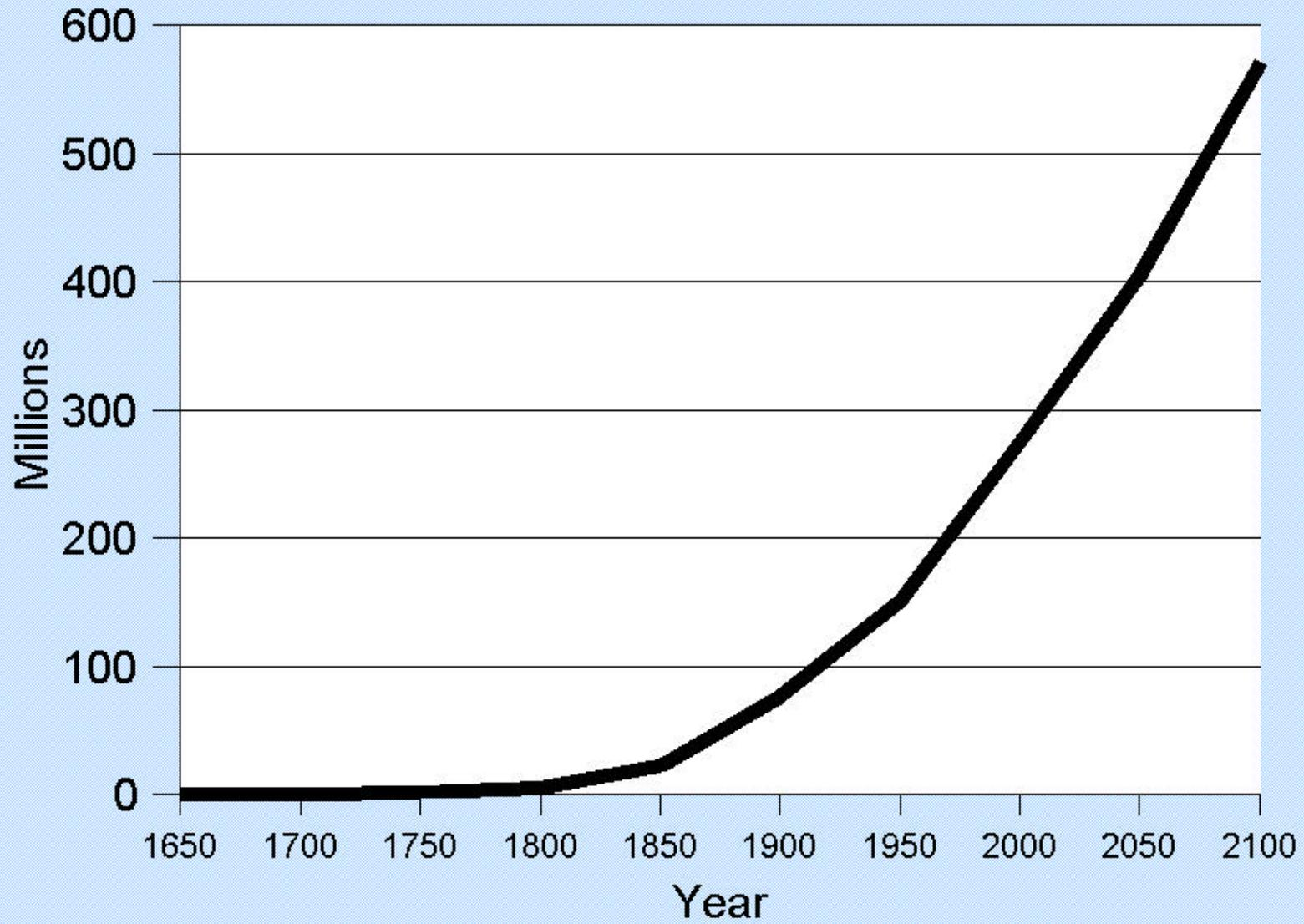
Percentage Population Change



Percentage Population change by Region and Conterminous U.S.

North	8.2
Pacific Coast	23.7
South	23.8
Rocky Mountains	28.5
Conterminous States	17.4

Historic U.S. Population Growth



The Changing American Society

➤ About 1 million new immigrants per year

➤ More people:

1990	248 mm
2000	275 mm
2020	325 mm
2050	404 mm
2075	481 mm
2100	571 mm

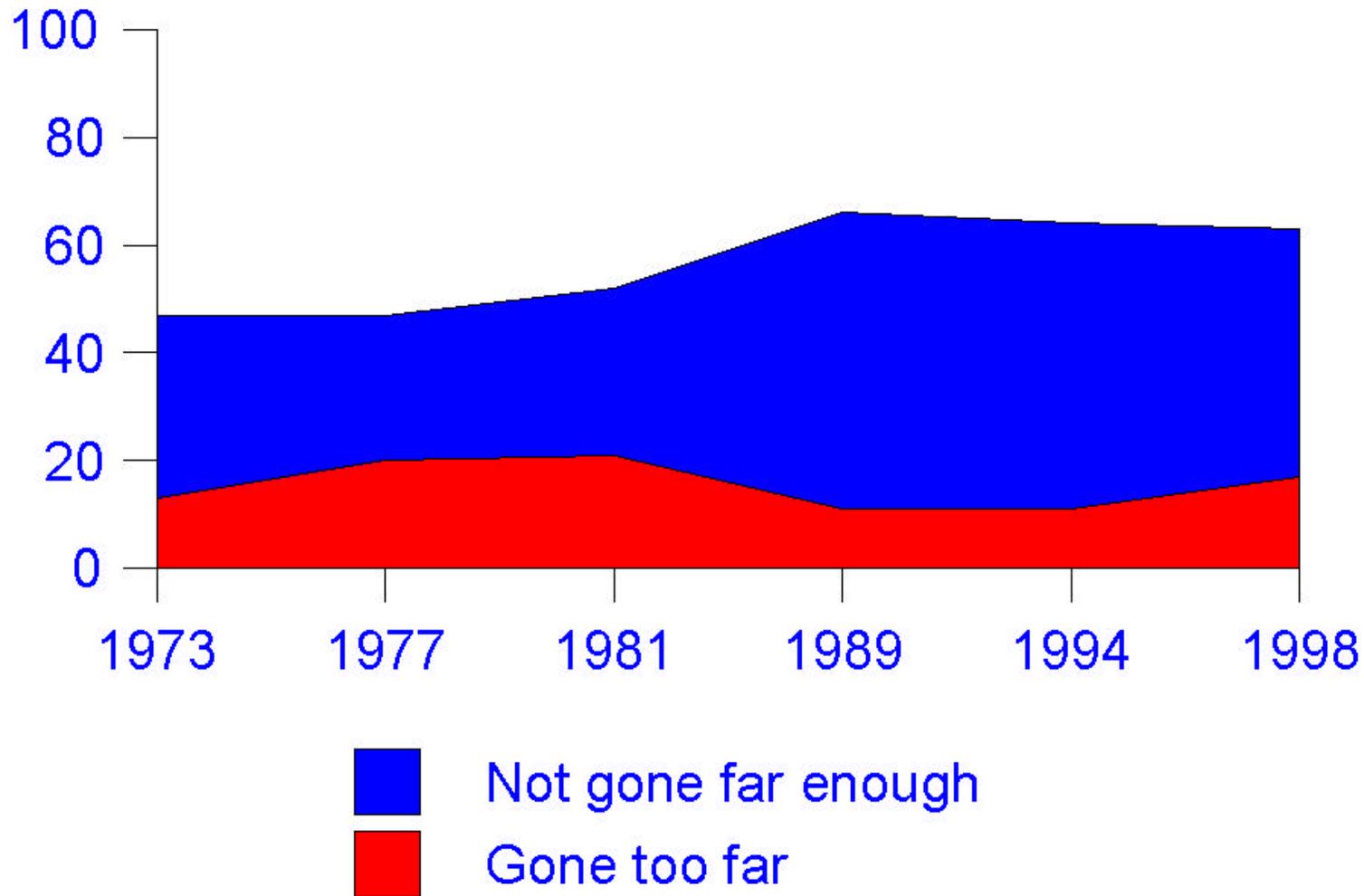
➤ Getting older: Median age 35 → 38 (by 2020)

➤ Changing ethnicities by 2050:

Anglo Americans	76% → 50%
African Americans	12% → 15%
Hispanic Americans	9% → 21%
Asian Americans	4% → 11%

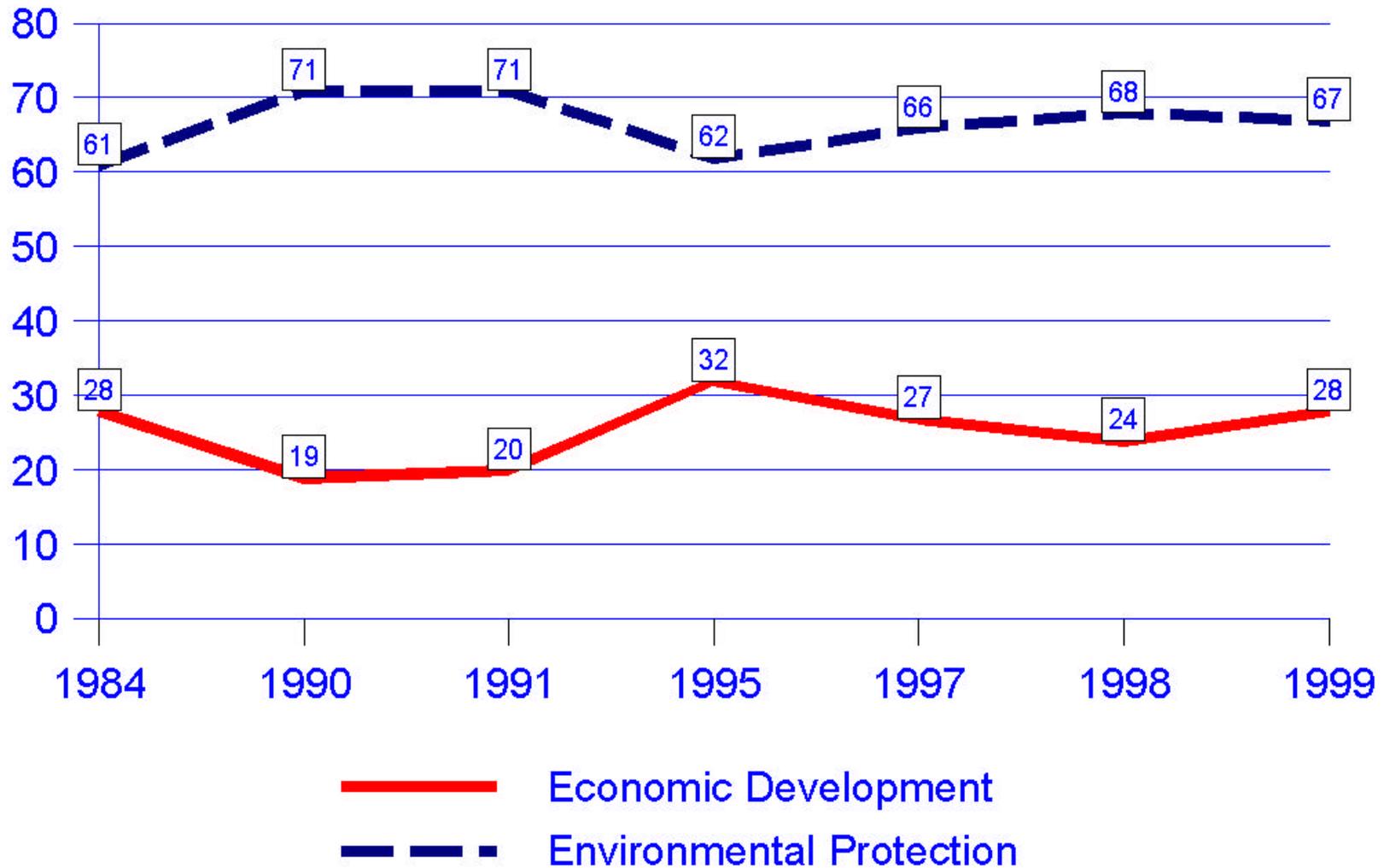
*AMIDST MUCH
CHANGE AT LEAST
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VALUE REMAINS
CONSTANT*

Environmental Protection Laws and Regulations Have:



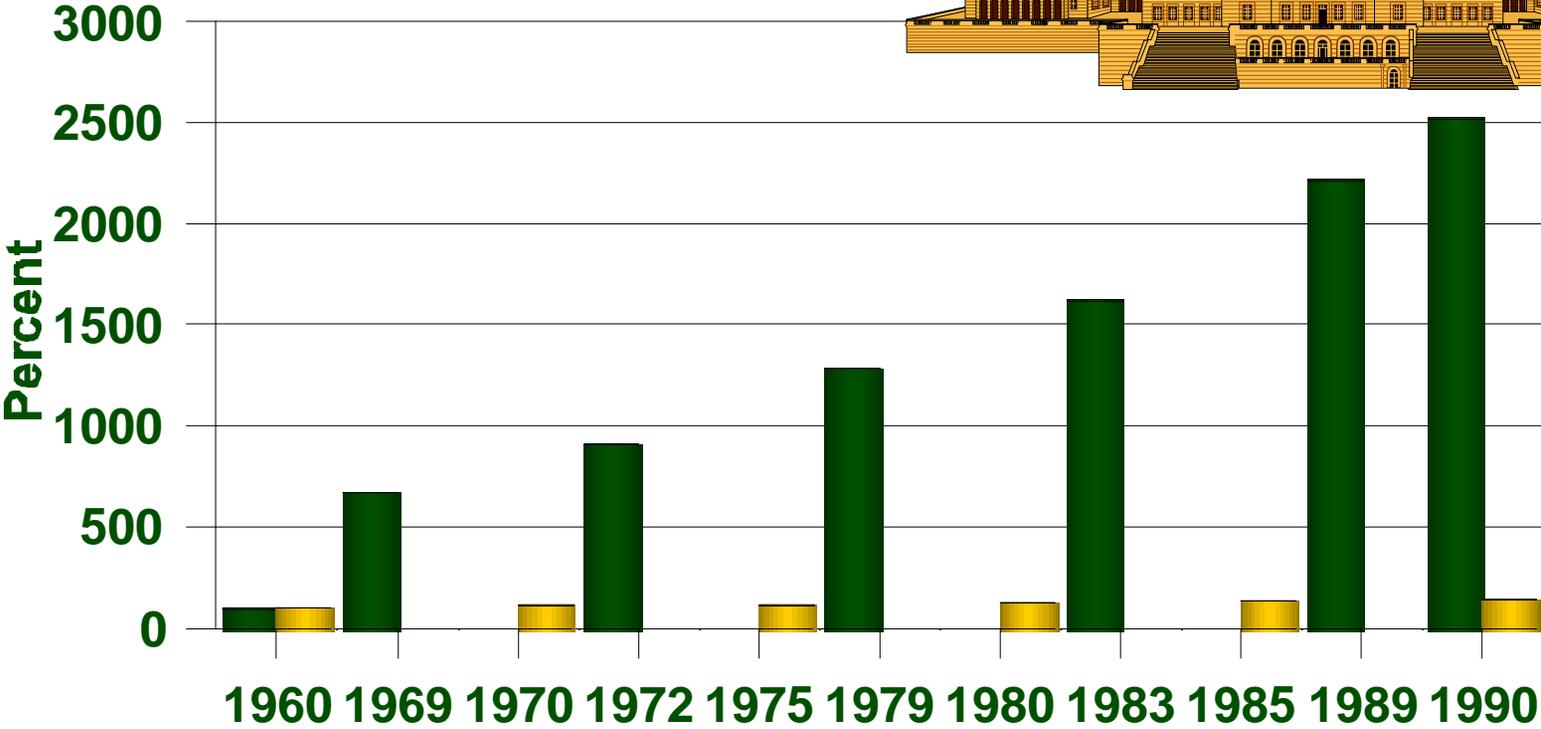
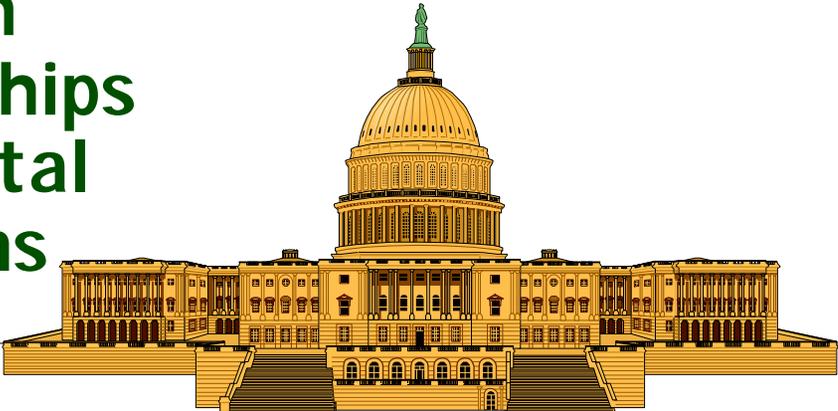
Source: Roper Organization, 1990; Times Mirror, 1994; NEETF, 1998.

Percentages Indicating Environmental Protection or Economic Development are Highest Priority



Source: Gallup/CNN/USA Today Poll, April 13-14, 1999.

Thirty Year Trend in Population and Memberships in National Environmental Lobbying Organizations



 Change in Membership
 Change in Population

RECENT POLLING

THE TARRANCE GROUP, REPUBLICAN POLLING FIRM

- **81% SAY PROTECTIING NATURAL RESOUSECES VERY TO EXTREMELY IMPORTANT PERSONALLY**
- **61 % SAY CONSERVATION FUNDING MORE IMPORTANT THAN HIGHWAYS OR AIRPORTS**

WHO SCORES NATURE HIGHEST?

- **VOTERS IN WEST AND GREAT LAKES**
- **WORKING WOMEN**
- **BLUE COLLARS**
- **THOSE UNDER 45**
- **HISPANICS**
- **SINGLES**
- **MOMS**

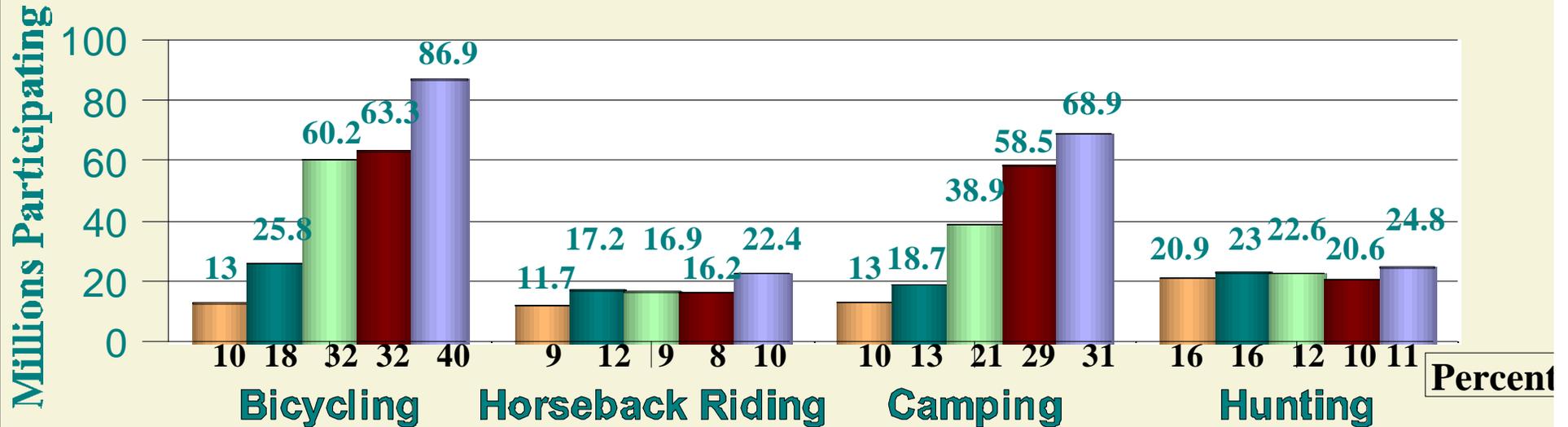
*OUTDOOR
RECREATION*

**NATIONAL SURVEY
ON RECREATION
AND THE
ENVIRONMENT—**

NSRE 2000

Long-Term Trends - Land

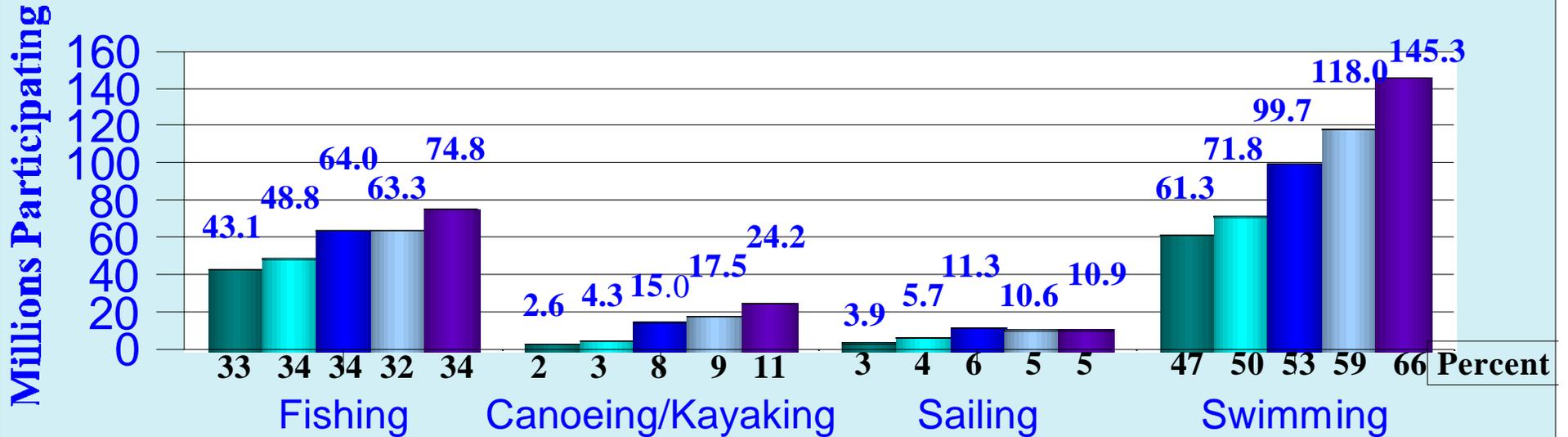
(12 or older)



- 1960 (131 million)
- 1965 (144 million, 10% more)
- 1982-83 (188 million, 44% more)
- 1994-95 (216 million, 65% more)
- 1999-2000 (220 million, 68% more)

Long-Term Trends - Water

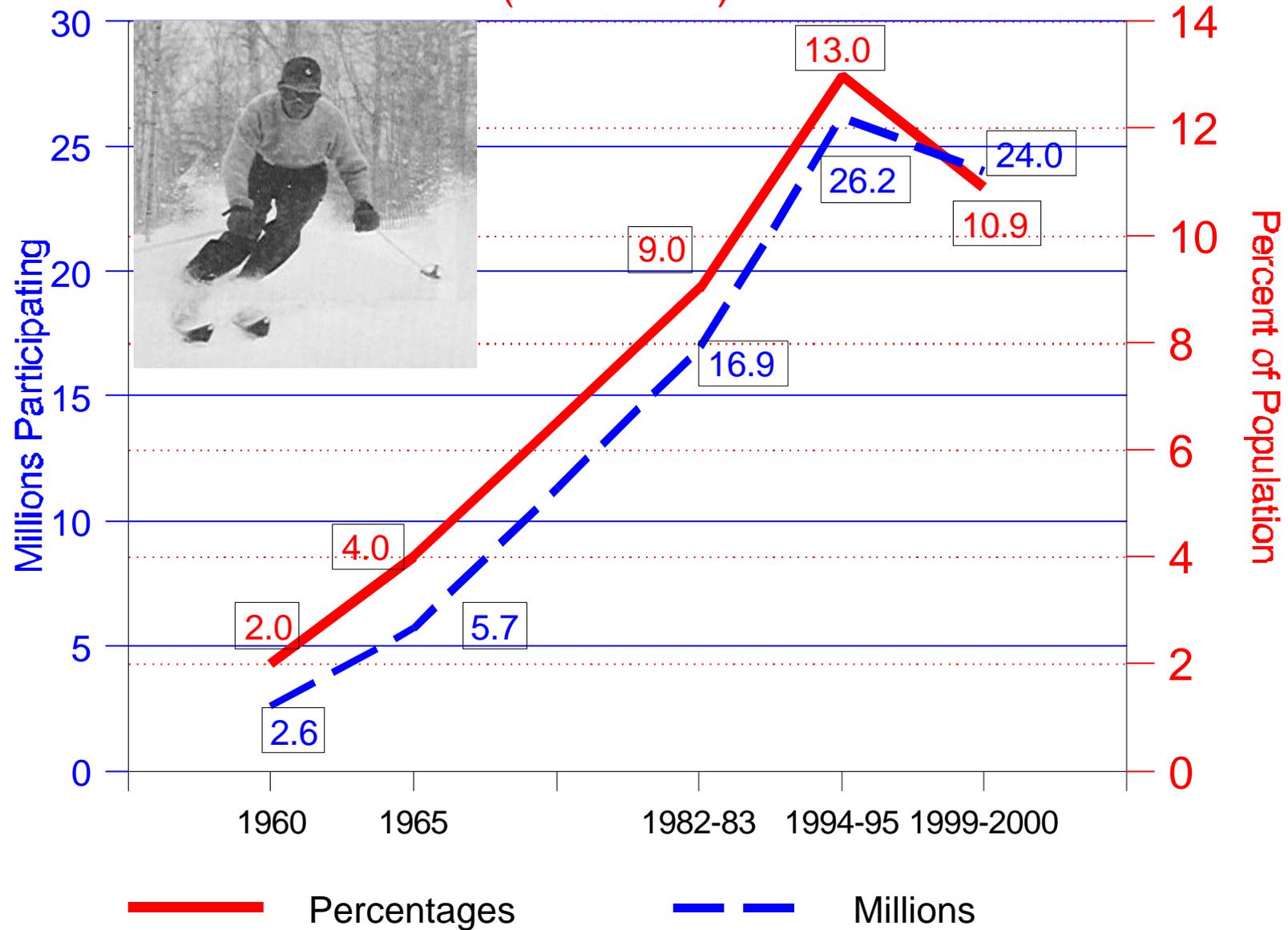
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Long-Term Trends - Snow

(12 or older)





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Activities Adding the Most Participants 16 or older, 1982-2000

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	<u>Growth</u>	<u>No. in 2000</u>
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Off-road driving	17.3	36.7
Backpacking	14.6	23.4

Most Popular Activities in 1995

(Days during which participated)

	Millions
Walking	14,381
Bird watching	4,749
Visiting a beach or waterside	3,187
Pool swimming	2,439
Wildlife viewing	2,308
Biking	2,237
Sightseeing	2,036
Studying nature near water	1,353
Swimming in lakes/streams/ocean	1,241
Family gatherings outdoors	1,084

Trips Away From Home For Outdoor Recreation (1995)

Land-Based

	(Million)
Sightseeing	1,037
Family gatherings	778
Wildlife viewing	671
Biking	553
Hiking	434
Birdwatching	386
Off-road vehicles	369
Camping	197
Horseback riding	124
Big game hunting	116
Backpacking	68

Water-Based

	(Million)
Visiting beaches	1,438
Freshwater fishing	606
Swimming (stream/lake)	542
Saltwater fishing	165
Floating/rafting	47
Canoeing	39

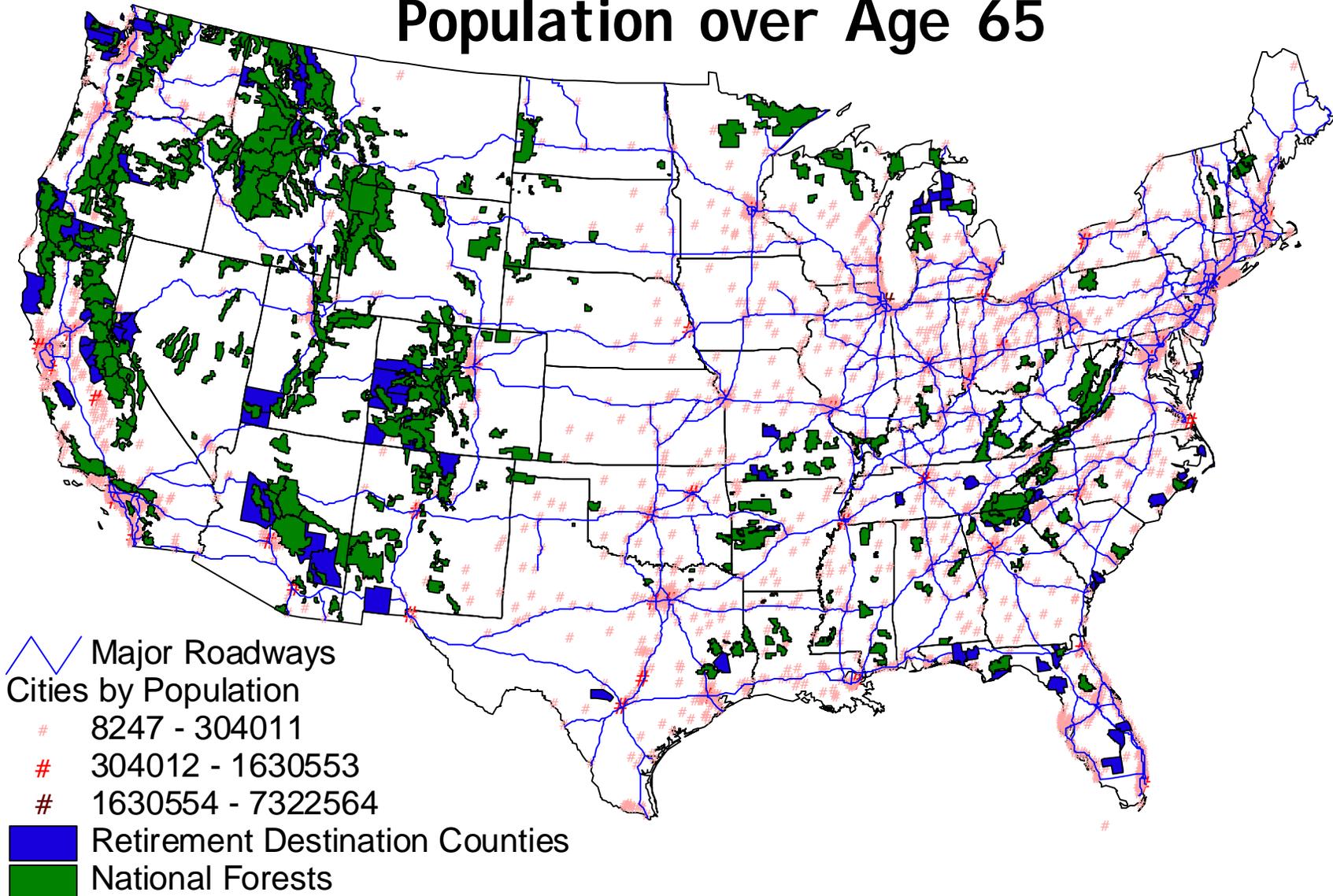


Snow/Ice

	(Million)
Downhill.....	75
Cross-country	25
Snowmobiling	23



Projected Retirement Destination Counties within Top 20% of Counties Increasing in Population over Age 65



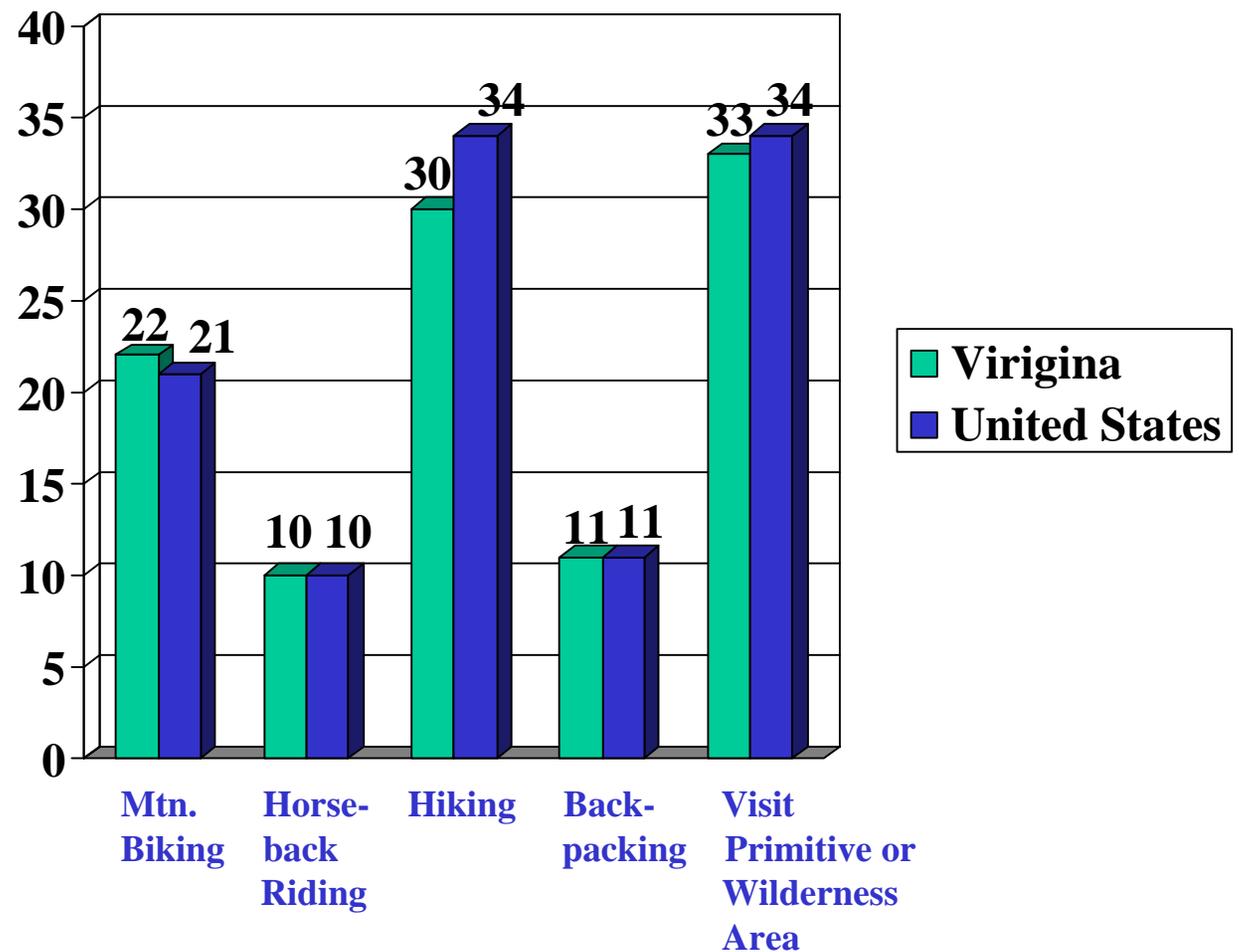


Demand In Virginia

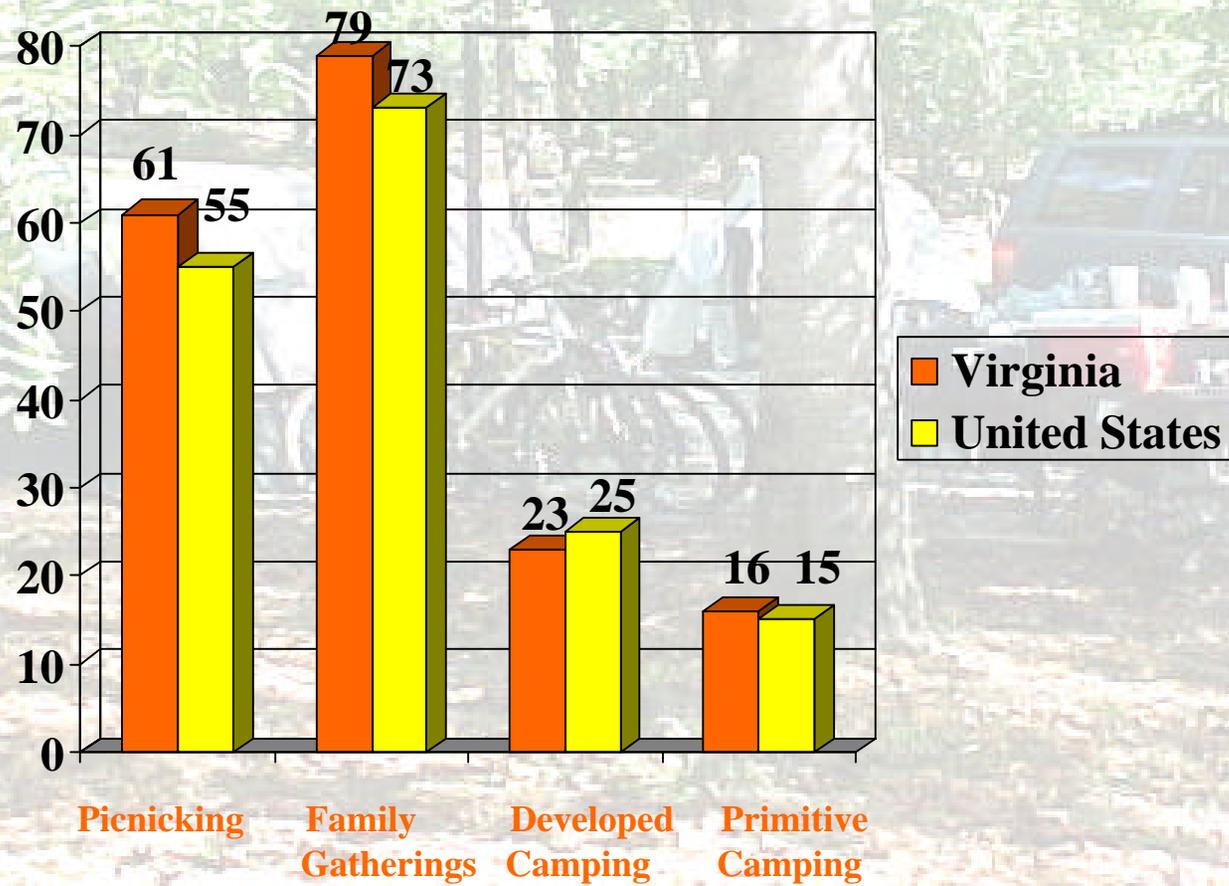
**RESULTS FROM NSRE
2000:
THE NATIONAL
SURVEY ON
RECREATION AND THE
ENVIRONMENT**



Recreation on Trails in Virginia



Camping and Picnicking in Virginia



Visiting Managed Learning Sites in Virginia

Nature Centers
and Museums

VA = 59%

US = 57%

Historic Sites

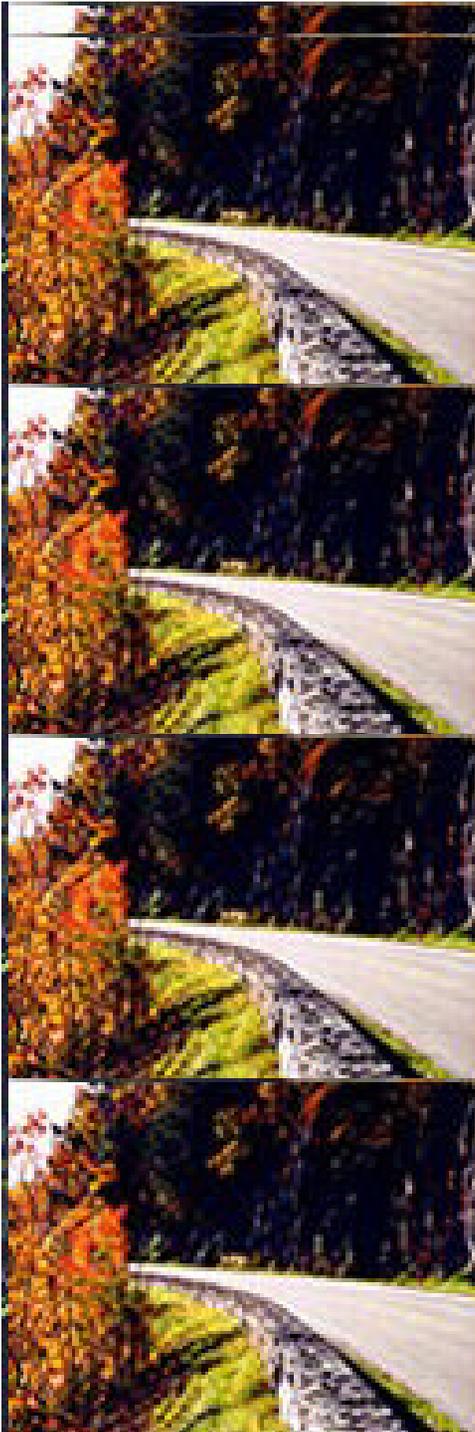
VA = 61%

US = 47%

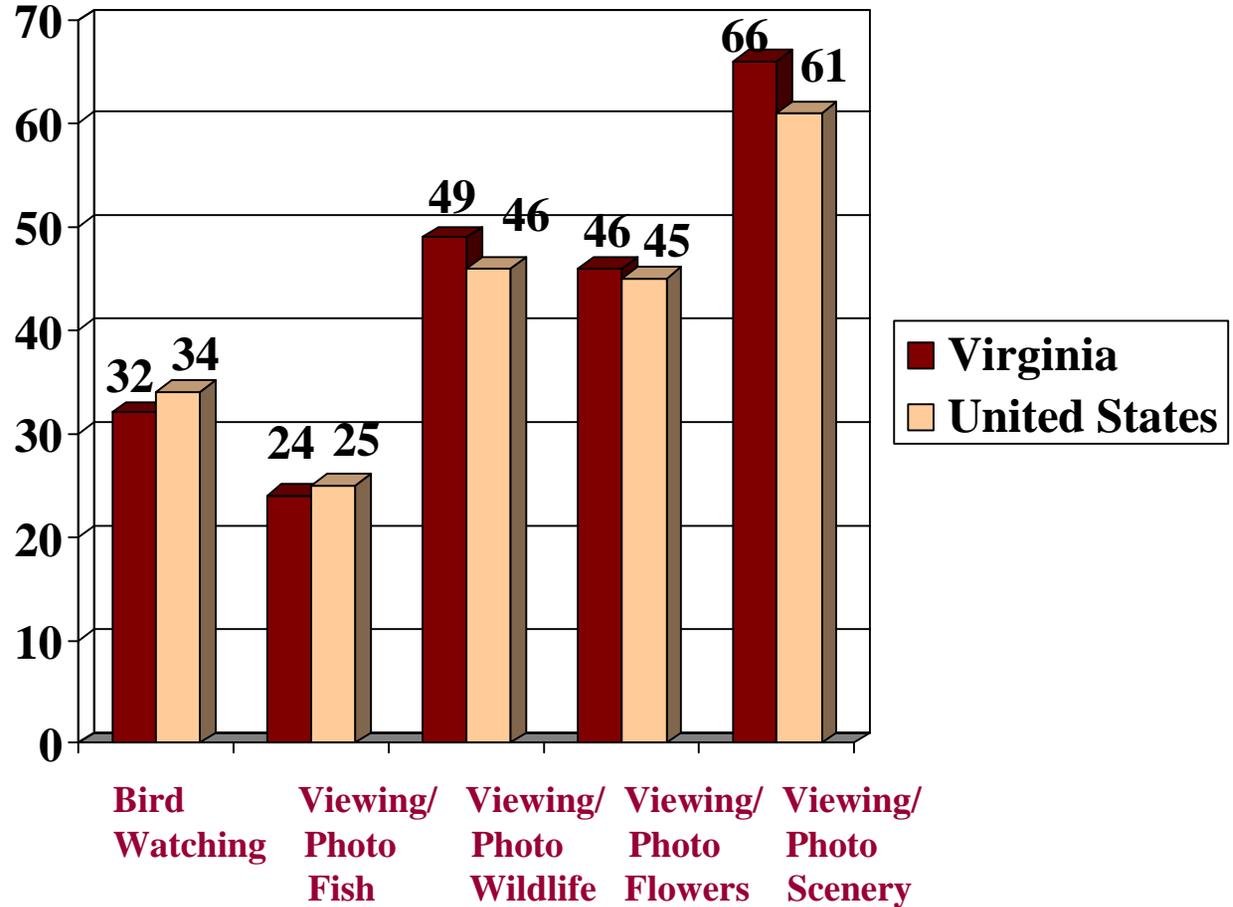
Prehistoric Sites

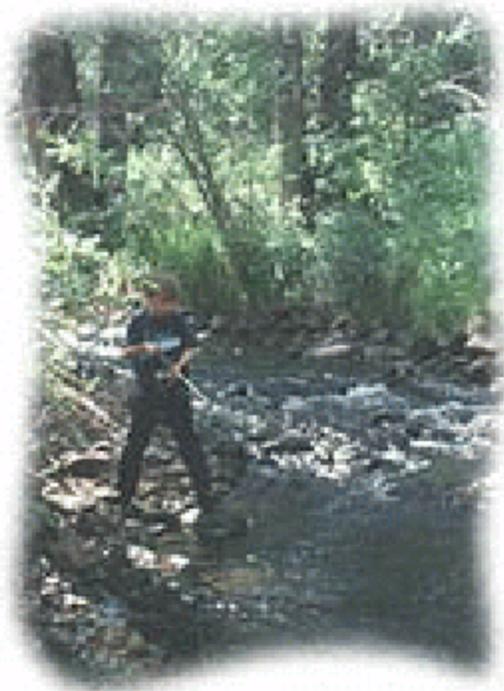
VA = 24%

US = 21%



Viewing and Learning about Nature





Consumptive Recreation

	Virginia (%)	U.S. (%)
Gathering mushrooms/berries/etc.	27	27
Hunting	11	11
Cold water fishing	13	13
Warm water fishing	27	23

Motorized Recreation

Driving for
Pleasure

VA = 56%

US = 53%

Off-Highway
Driving

VA = 18%

US = 17%

Snowmobiling

VA = 2%

US = 5%

Motor Boating

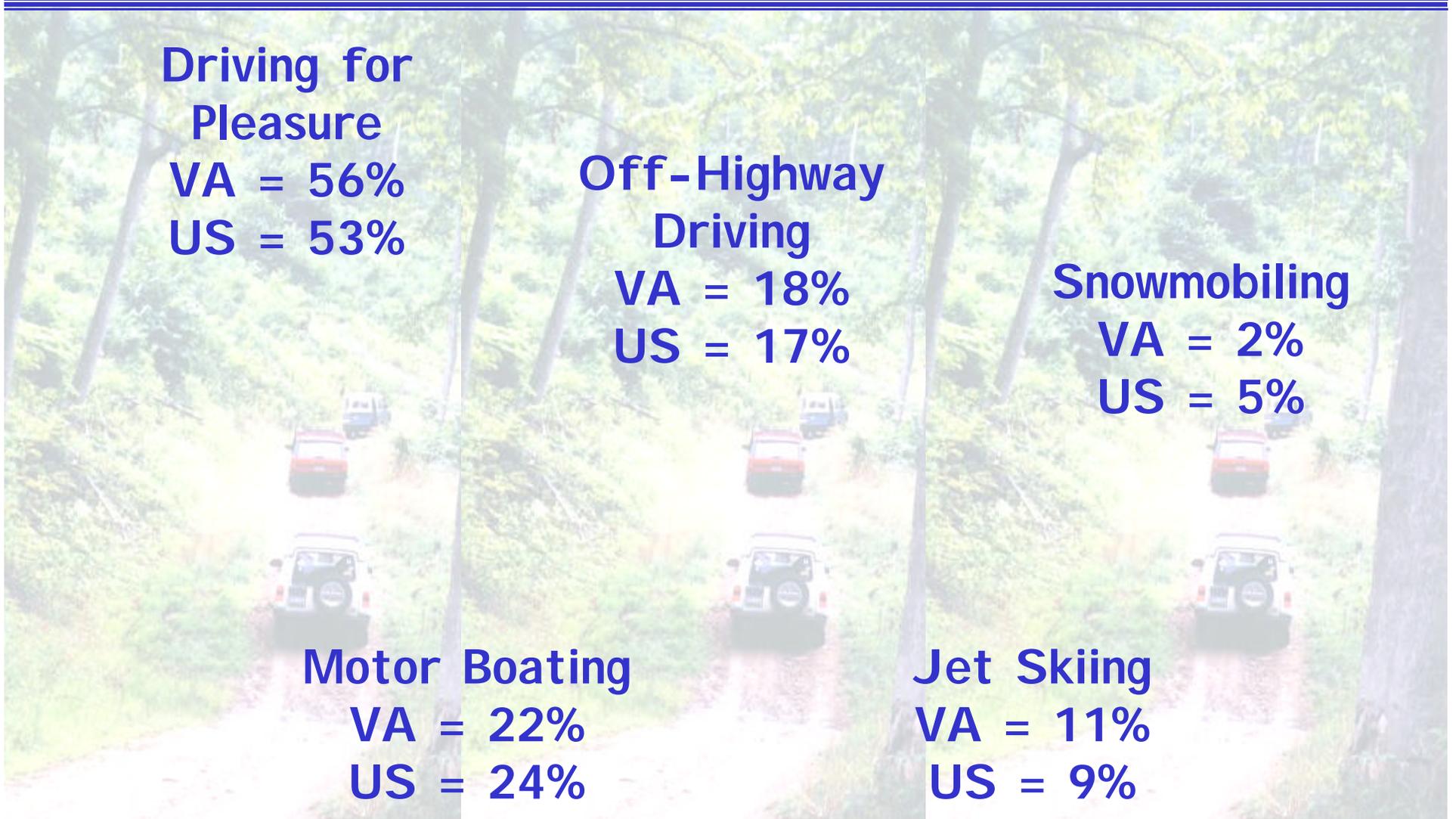
VA = 22%

US = 24%

Jet Skiing

VA = 11%

US = 9%





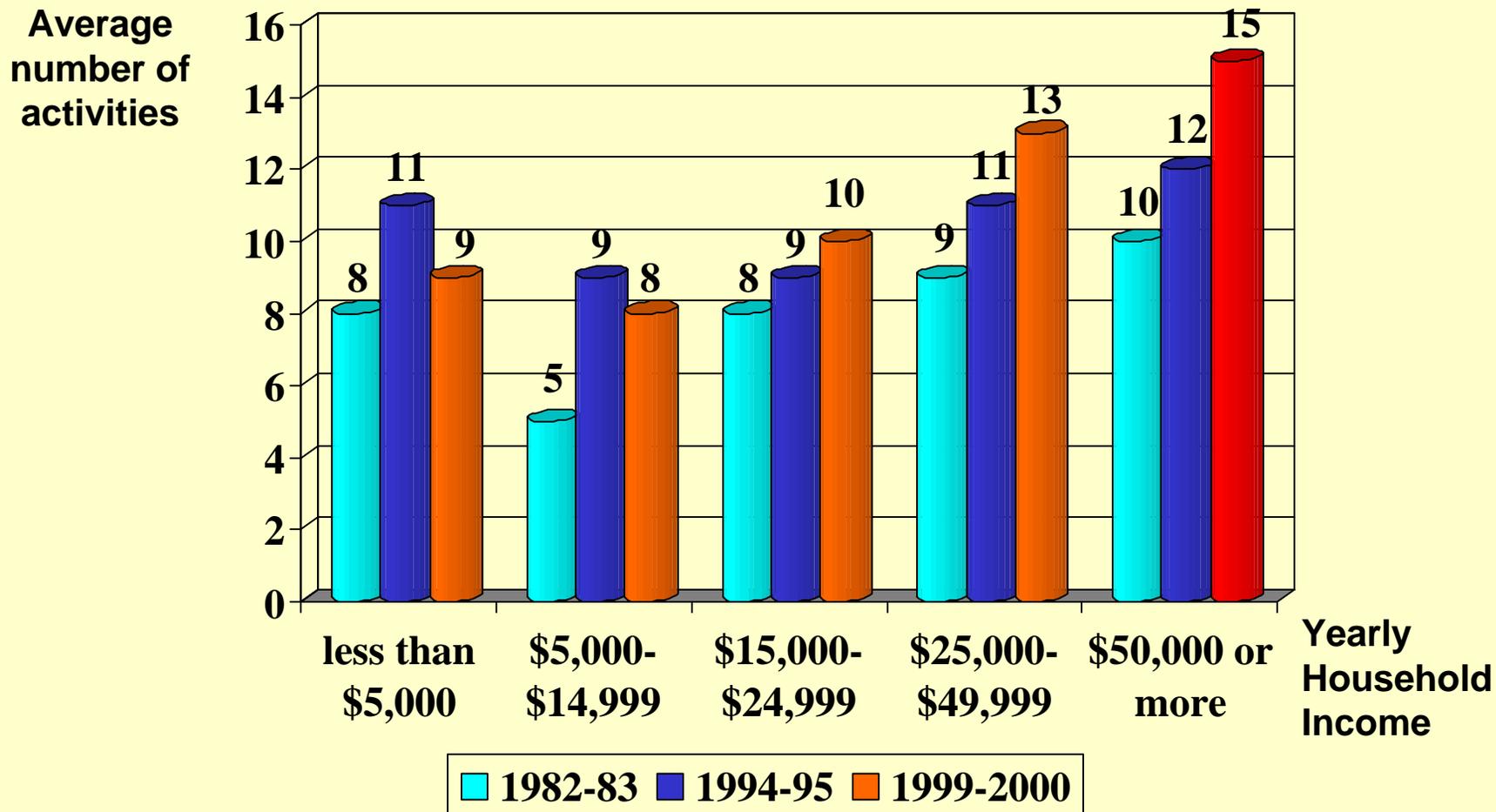
Snow and Ice

	Virginia (%)	U.S. (%)
Any activity	25	26
Downhill skiing	7	8
Snowboarding	5	5
Cross-country skiing	2	4
Snowmobiling	2	5

Shifts

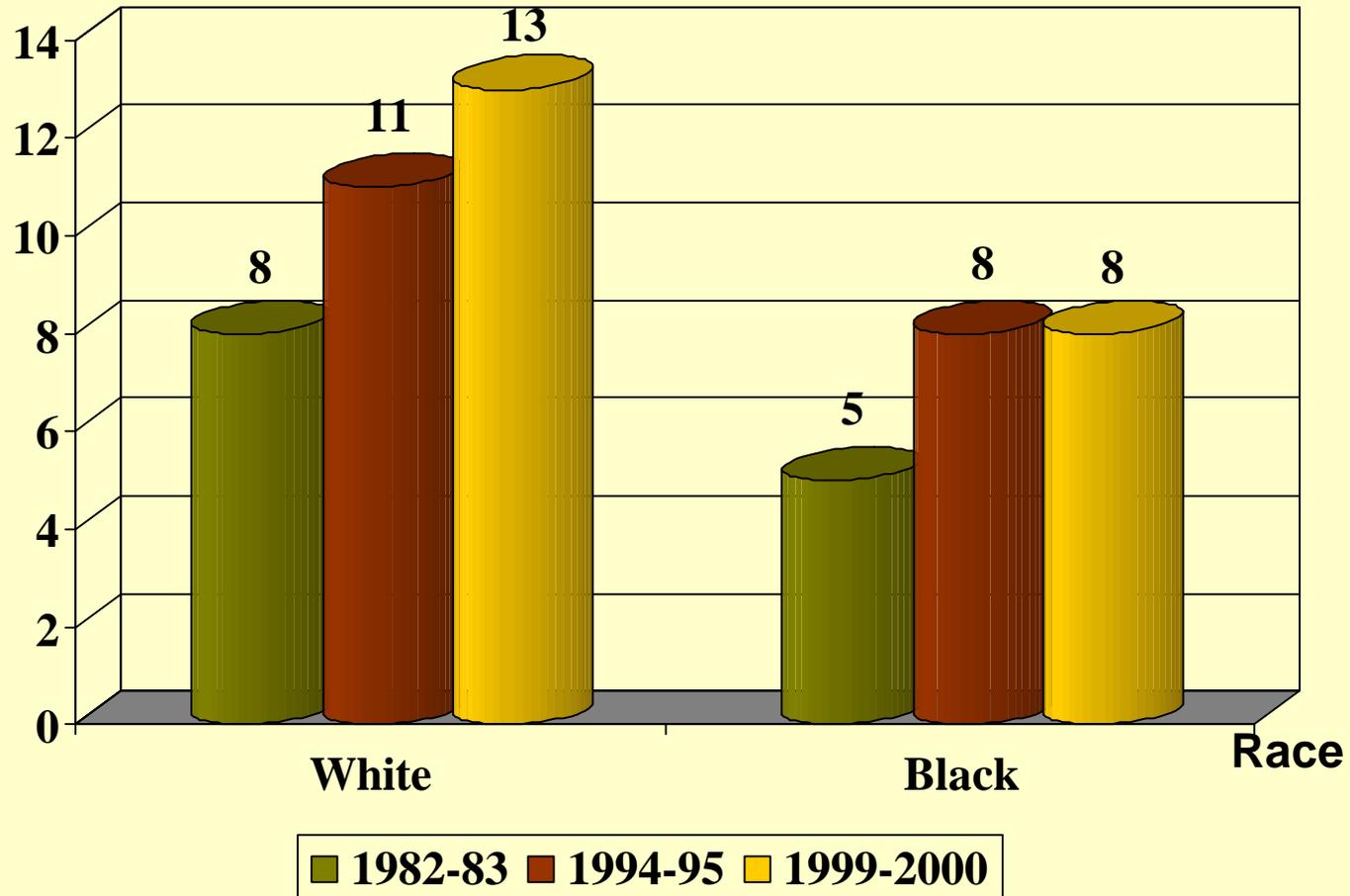
- ⇒ The average outdoor participant is changing; Fewer HS educated, <\$25K, from large households; More College educated, >\$50K, other races, and smaller households.
- ⇒ People are remaining active in their chosen activities longer in life.
- ⇒ Working parents mixing recreation with business travel, bringing family along.
- ⇒ Increasingly Americans support “green” travel.
- ⇒ Resurgence in interest in family travel.
- ⇒ Use of RVs is booming.

Trends in Number of Activities



Trends in Number of Activities by Race

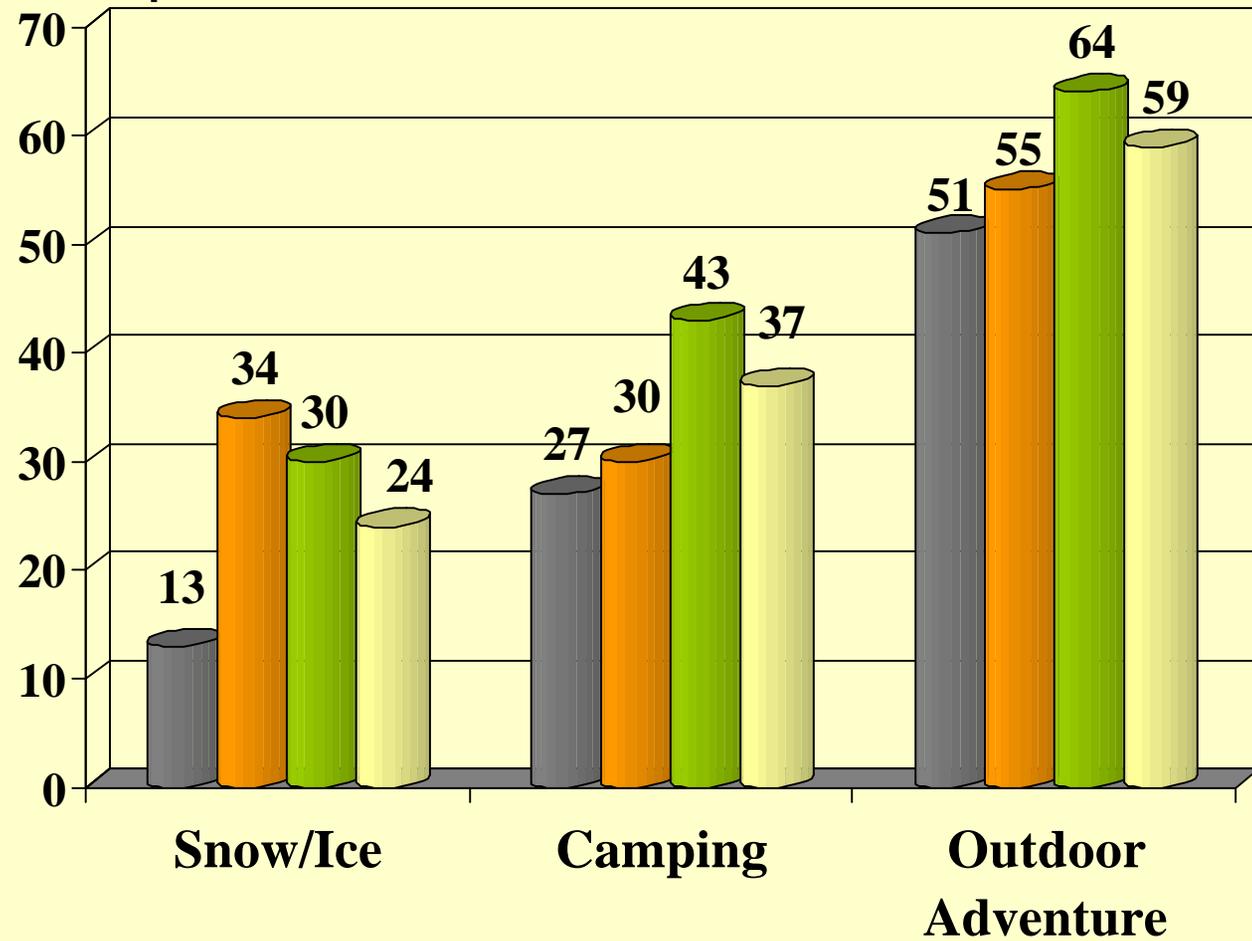
Average number of activities





Regional Participation Differences in 2000 (Percentages)

Percent of Population 16+



■ South ■ North ■ Rocky Mtn/Great Plains ■ Pacific Coast

***Public
Thoughts
on Public
Lands***

Objectives for Managing Public Lands

(Percent saying important to very important)

Expanding access for motorized vehicles (20%)

Developing trail systems for motorized uses (29%)

Developing trail systems for non-motorized rec. (57%)

Conserving/protecting sources of water (91%)

Designating more wilderness areas (58%)

Developing paved roads for cars (19%)

Preserving resources through policies (75%)

Preserving wilderness experience (74%)

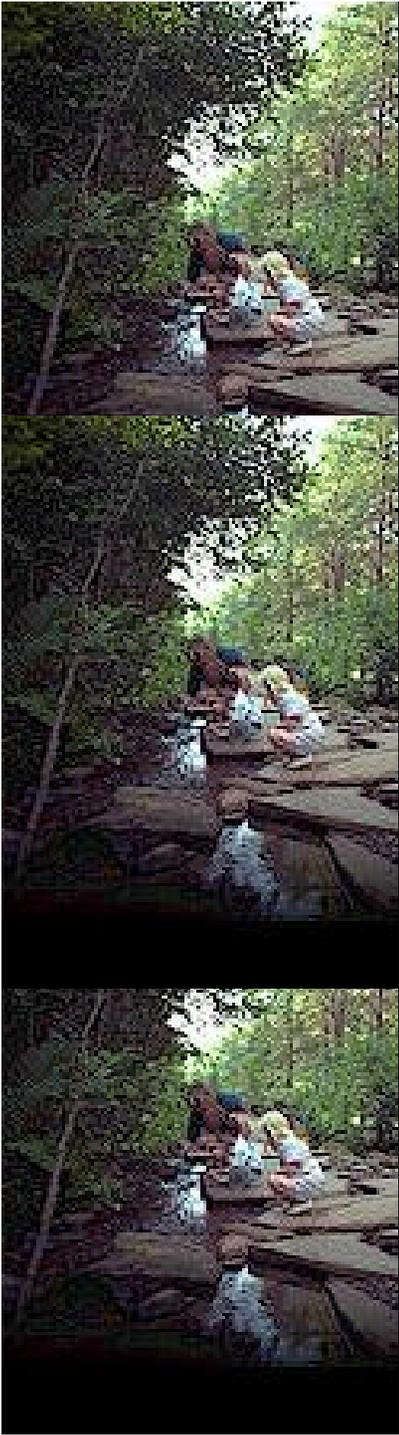
Protecting ecosystems/habitats (86%)

Providing resources to help local communities (51%)

Increasing acres in public land (53%)

Expanding commercial recreation (28%)

Informing public on potential environmental impacts (81%)



Public Land Management Objectives MOST Desired by the Public

- ❖ Conserve and protect natural sources of water (91.4%)
- ❖ Better information for users, such as respect for wildlife and trail etiquette (87.2%)
- ❖ Protect natural ecosystems and wildlife habitats (86.0%)
- ❖ More use of volunteers for resource protection and improvement (85.6%)
- ❖ Better information for users about use impacts (81.1%)
- ❖ Consistent policy for guiding resource uses and management (76.0%)



Public Land Management Objectives LEAST Desired by the Public

- Develop more trails for motorized uses (28.9%)
- Expand commercial recreation uses (28.2%)
- Make special use permits easier to get (27.3%)
- Trade public lands for private lands to consolidate public holdings (22.1%)
- Expand access to motorized vehicles (19.8%)
- Develop more paved roads (19.2%)

Qualities of Recreation Sites That Are “Very” To Extremely Important

(In order, highest to lowest)

	North	Pacific	Rockies	South
Clean restrooms, facilities, grounds	82	77	74	84
Safe, secure feeling	82	75	73	84
Quality scenery as backdrop	77	77	77	76
Reasonable fees and good service	68	64	64	68
Helpful and courteous employees	65	55	55	66
Good roads and available parking	63	56	53	65
Maps, informational signs, brochures, etc.	57	54	54	57



*OUTDOOR
PERSONALITIES:
SEGMENTING
AMERICAN'S BY THE
RECREATION
ACTIVITIES THEY
PREFER*

Outdoor Recreation Styles

Sports Hogs

Individual and Team Sports
Winter Sports
Boating and Swimming
Sports Spectators
Mountain and Rock Climbing

Fitness Buffs

Running and Walking
Biking
Swimming
Do Not Hunt or Fish

Nature Lovers

Walking and Birding
Wildlife and Fish Viewing
Photography
Nature Study



Outdoor Recreation Styles (continued)

Outdoor Avids (10%)

Fishing and Hunting
Camping and Boating
Family Activities
Walking and Hiking
Biking and Horseback Riding (23%)
Viewing/Learning and Birding

Passives (21%)

Family Gatherings
Walking
Sightseeing/the Beach

King Fishers (13%)

Family Gatherings/the Beach
Freshwater Fishing

Do Nothings (22%)

Less than 1 percent
participate occasionally

Nature Lovers

Well-off, highly-educated, older, mostly white females in small households with no kids and who like to:

Picnic

Visit Nature Centers

Walk

Sightsee

And

Watch Wildlife and Birds

Sports Hogs



Middle-income, well-educated, young, mostly white males in 3-5 person households with no kids and who like to:

Watch Sports

Run and Play Ball Games

Play Yard Games

Bike, Walk, and Swim

Ride Horses, Sightsee, and Go
to the Beach

Motorboat

Picnic and Do Nature Study

Outdoor Avids

Middle-aged, white, more male than female, college educated, high-incomed 2-person householders with no kids, and who like to:

Participate in family activities

Attend sports and ride horses

Visit historic or nature sites

Camp, hunt, and fish

Motorboat and go to the beach

Watch wildlife and birds

They don't play sports or snow activities.

NSRE 2000 and Marketing Research

- NSRE 2000 will ask knowledge, attitudes, sensitivities, uses, and values of related to natural resources across all of American society
- Segment the public using differences in environmental attitudes, recreation participation patterns, lifestyles, demographics and region of the country
- Use significant factors in the design of tailored outreach and educational strategies.

Varied Lifestyles Varied Lifestyles

Activity	Percent Participating Regularly				
	North	South	Great Plains	Rocky Mtns	Pacific Coast
Belong to environmental group	7.3	9.0	8.6	8.9	8.0
Run own business	14.5	17.5	15.4	23.6	21.0
Have a vacation home	15.1	15.1	11.3	15.3	15.5
Commute >45 minutes	16.1	16.6	12.6	11.8	14.9
Youth volunteer	19.9	20.4	20.2	19.8	17.3
Playing stock market	24.2	23.0	20.1	20.4	21.8
Read nature magazines	25.1	27.1	27.6	23.6	26.1
Collecting things	26.1	29.8	26.7	24.3	25.6
Creative arts	27.2	23.9	23.9	25.6	29.0

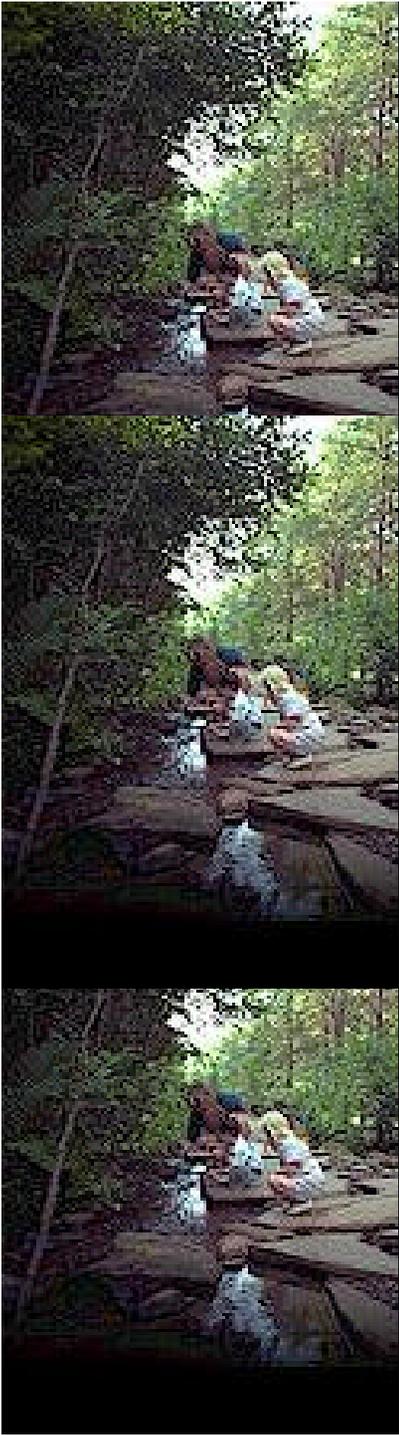
Varied Lifestyles Varied Lifestyles

Activity	Percent Participating Regularly				
	North	South	Great Plains	Rocky Mtns	Pacific Coast
Crafts	27.2	27.3	27.8	32.3	30.4
Grow a garden	32.8	30.6	34.5	30.4	33.6
Eat out	37.9	50.6	43.0	44.7	44.6
Exercise	40.6	41.2	39.4	45.4	46.7
Follow sports	44.3	48.9	43.5	43.5	45.3
Raise kids	44.6	47.0	46.2	42.2	44.3
Attend church	46.5	57.3	49.7	44.1	36.0
Use computer at home	56.0	51.8	50.5	55.6	58.7
Care for pets	56.7	59.5	60.3	62.0	60.3
Recycle	75.9	52.4	64.7	54.3	77.1
Cook at home	79.9	76.9	80.4	84.0	84.5

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*CHANGE WILL
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- ❖ Better information for users, such as respect for wildlife and trail etiquette (87.2%)
- ❖ Protect natural ecosystems and wildlife habitats (86.0%)
- ❖ More use of volunteers for resource protection and improvement (85.6%)
- ❖ Better information for users about use impacts (81.1%)
- ❖ Consistent policy for guiding resource uses and management (76.0%)

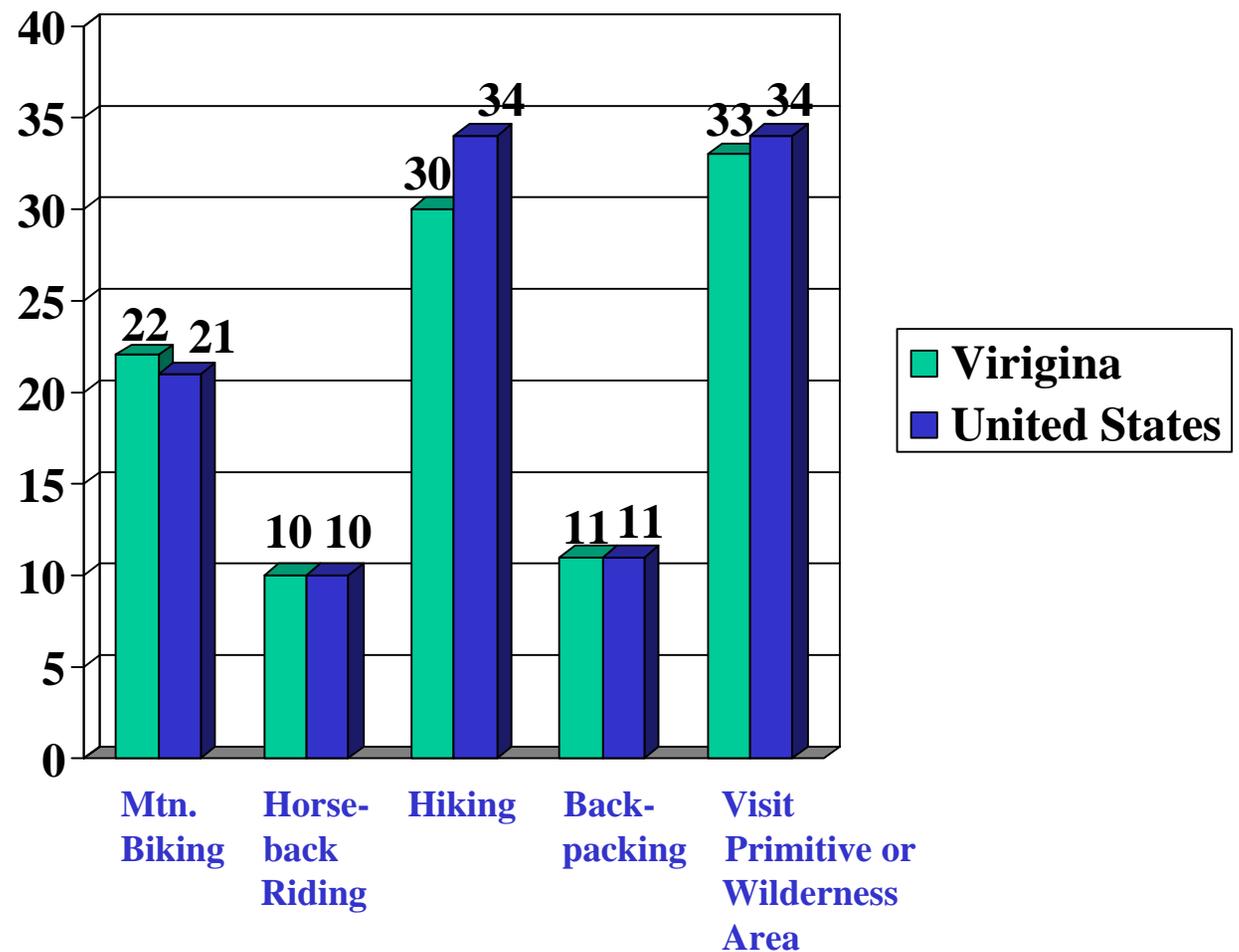


Activities Adding the Most Participants 16 or older, 1982-2000

	<u>Millions</u>	
	<u>Growth</u>	<u>No. in 2000</u>
Walking	85.4	179.0
Bird watching	50.0	71.2
Hiking	48.4	73.1
Swimming/river, lake, or ocean	36.4	92.9
Sightseeing	32.7	114.0
Picnicking	31.8	116.6
Bicycling	27.4	83.9
Developed camping	22.8	52.8
Motor boating	17.8	51.4
Off-road driving	17.3	36.7
Backpacking	14.6	23.4



Recreation on Trails in Virginia



Outdoor Recreation Styles (continued)

Outdoor Avids (10%)

Fishing and Hunting
Camping and Boating
Family Activities
Walking and Hiking
Biking and Horseback Riding (23%)
Viewing/Learning and Birding

Passives (21%)

Family Gatherings
Walking
Sightseeing/the Beach

King Fishers (13%)

Family Gatherings/the Beach
Freshwater Fishing

Do Nothings (22%)

Less than 1 percent
participate occasionally

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NSRE 2000

TRENDS IN OUTDOOR RECREATION AND TOURISM:

**Virginia Governor's Conference on
Greenways and Blueways, October, 2000**



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