

# THE EVOLUTION OF OUTDOOR RECREATION IN AMERICA

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## SUMMARY

Outdoor recreation is among the most visible and vigorous of social phenomena in the United States. Almost everyone is a participant in one way or another. Outdoor recreation also is an important part of the broader social, economic, cultural and resource evolution that is occurring in the United States. As a component of this evolution, it is both affected by and directly affects the ongoing transition in the American way of life. The paper overviews the outdoor recreation situation in the United States as being driven by dynamic social, technical and economic changes. A description of the system that has been established to assess trends and market shifts that result from these changes is provided with notation of improvements that are being developed for the latest decennial assessment to be reported in 1998. The importance of economic analysis as a part of the assessment process is discussed as one of the bases for better understanding and predicting trends. Following that discussion, highlights of the current demand and supply situation are presented with some speculation about trends that might begin to unfold over the next several years. The overall trend has been a voluminous growth in both the number of people and level of consumption of outdoor recreation. There has been a shift of supply from federal to state and especially to local systems and to private sector due to federal budget reductions. An expansion of shared roles between public and private sector might be an option to meet public demands for resource-based outdoor recreation.

Keywords: recreation, social changes, trends, national assessment, economic analysis, USA

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## 1. INTRODUCTION

For most of the first two centuries of its existence as an independent country, the United States was dominated by rural lifestyles and a population which mostly made its living from the land. Resources were seemingly limitless and space infinite. The last three decades, however, have been a time of drastic departure from our Country's rural roots as the population has continued to move farther and farther away from its close attachment to and dependence on the land. With this transition away from the land have come changes in American society and its culture. Along with cultural changes, much heavier demands are being placed upon the rich natural resource base of the United States than has ever before occurred in this Country's history.

Outdoor recreation is an important component of the broader social, economic, cultural and resource evolution that is occurring in the United States. As a component of this evolution, outdoor recreation is both affected by and directly affects the sweeping transition that is occurring in the way we as American people live, and perhaps also in the way we think. The technology and consumption-driven urban society that exists today demands in some ways a very different mix of recreational pursuits, settings and services than was in demand by the more rural, land-based society that existed in the past. In other ways, contemporary recreational demands resemble those of the past. This paper will focus more on the changes that are occurring than on the on-going and more stable aspects of outdoor recreation in American culture.

As the character of the demand for outdoor recreation settings and services change, so too must the infrastructure that provides opportunities for public consumption. Government at all levels has always been a very significant part of the outdoor recreation infrastructure in the U.S. To be responsive and efficient in this provider role, the public sector must have up-to-date information detailing market trends. Unlike the private sector, most of the opportunities provided by the public sector are available free to whoever wishes to avail themselves of those opportunities. Thus the price, revenue and profit signals, which for the most part guide the private sector, are absent in the public sector. To help in monitoring trends in public demands for outdoor recreation, a government supported national assessment is conducted every 10 years in the United States to identify significant market shifts that may signal a need for policy, budget, management, and/or infrastructure adjustments.

In this paper I overview the outdoor recreation situation in the United States as I see it being driven by dynamic social, technical and economic changes. A description of the system that has been established to assess trends and market shifts that result from these changes is provided with notation of improvements that are being developed for the latest decennial assessment to be reported in 1998. The importance of economic analysis as a part of this assessment process is discussed as one of the bases for better understanding and predicting trends. Following that discussion, highlights of the current demand and supply situation are presented with some speculation about trends that might begin to unfold over the next several years.

## 2. OVERVIEW OF CHANGING TIMES

The dynamics of the social and economic system in the United States are too many and too complex to cover comprehensively in this paper. But the general nature of these dynamics is so important to understanding the evolution occurring in outdoor recreation that coverage of some

of the key factors driving change, in the view of this author, are described. The factors covered include population growth, population migration, mobility, growing conservatism, land development and technology.

Just 10 years ago the **population growth** rate in the United States was predicted to nearly reach zero in about 50 years (USDA Forest Service, 1989). The aging of the population, expected declines in fertility rates and slowing of immigration were predicted to lead to a nearly stable population level with only 0.2 percent growth per year by 2040. In the 1990s, however, one does not hear zero population growth predicted for the United States for any of the decades in the foreseeable future. Driven in part by immigration from other countries (approximately 1,000,000 new, legal immigrants per year), in part by a mixture of tax, economic and social incentives for adults to have children and additionally by other social and economic factors, population in the United States is continuing to grow at well over a 1-percent-per-year rate. This means there is typically a net addition of 3.0 million more people living in the United States each year to share whatever destiny awaits us. As the percentage growth rate remains more or less constant, the compounding effect over time leads to an increase in numbers of people making up this growth each successive year.

Pushed along by rapid population growth in some metropolitan areas; by growth in crime, violence and higher living costs; by greater affluence and an accompanying desire to live a simpler life with less pressure; and by an explosion in the communications and transportation industries that for many enables nonlocation specific work places; a surge of **population migration** to the more aesthetic regions is in progress. One of the regions experiencing such growth is the Rocky Mountains and associated western mountainous areas of Colorado, Utah and Wyoming. These are also locations where vast stretches of public land (National Forests, National Parks, and other components of the public domain) and private recreation development are found. Most predictions show this migration to the more aesthetic and less populated regions continuing well into the next century.

A third factor helping to drive the evolution of outdoor recreation demand and supply in the USA is **increasing mobility**. As in many other parts of the world, air travel services now enable transportation to any part of this country from any other part of the country in less than 5 hours, except to or from the outlying states of Alaska and Hawaii. An elaborate interstate highway system allows people to drive cross country in just over 4 days, and a vast system of primary and secondary roads connects everything to everyone. Automobiles, in addition, are much more efficient, reliable and comfortable than in years past and make driving much less physically taxing and less expensive, after the initial purchase price, of course. Continuation of low priced fuel has kept recreational travel at high levels. With greatly expanded mobility comes greater travel for outdoor recreation. It is estimated that as many as 3.5 billion trips away from home for outdoor recreation will be taken by the year 2,000 (Cordell 1990). (An additional consequence of the proliferation of automobiles is the vast area of land consumed by highways, massive parking capacity and the automobile servicing industry. This has a direct impact on outdoor recreation in that green space, otherwise generally accessible for outdoor activities is made no longer available.)

Another factor helping to drive outdoor recreation evolution is growing **political and fiscal conservatism**. The United States Congress is now, for the first time in 45 years, seated with a majority of the more conservative Republican delegates in both houses. Much the same trend

toward election of Republican candidates has been occurring at the same time at state and local levels. In concert with this political trend, fiscal resources available to operate government, the dominate provider of natural resource-based outdoor recreation, have been growing at a pace slower than population and demand growth. As a result, government provided outdoor opportunities are growing more slowly or, in some instances, declining. There is more emphasis on a pay-as-you-go fee system to help generate additional revenues to support operation and development. Less general funding and higher fees may limit opportunities at some levels that are provided free or at low cost to users which, of course, impacts the availability of opportunities to lower income citizens.

A fourth factor influencing the evolution of outdoor recreation is urban, residential, transportation and other forms of **land development**. Already mentioned is the extensive land conversion caused by the automobile. In addition, it seems to not be possible to travel to any community or area in contemporary United States without encountering highway, shopping center, residential subdivision, or other forms of intensive development in progress. The net result, obviously, is less undeveloped private land and water, one of the essential ingredients for most forms of nature-based outdoor recreation. In decades past, access to privately owned rural lands was generally not questioned for anyone who wished to have such access. Land development pressures, less undeveloped rural land areas, larger population pressures, and many other trends have continued to decrease access to the shrinking, undeveloped private rural land base. This has in turn put more pressures on public lands which have been receiving smaller funding for outdoor recreation facilities and services.

Finally, but by no means exhaustively or least in importance, **technology advancements** are having profound, though not well understood, affects on outdoor recreation. Increasing ease of access to information about opportunities, greatly improved and lighter-weight sports equipment, virtual reality experience media emulating the out-of-doors, and new forms of equipment have transformed the ways people participate, added activities that did not heretofore exist, and enabled "experiencing" the out-of-doors vicariously through virtual reality. More mobile and "agile" off road vehicles, an explosion of jet skis (and other personal water craft), snow boards, helicopter-assisted skiing and other backcountry recreation, and a wide variety of added capabilities have proliferated. (This author loves the out of doors and participates actively in many recreational pursuits. Some of the more recent forms, however, e.g., jumping off high bridges with elastic cords attached to one's ankles is not a favored or sought after pursuit.) In addition, availability of information about recreation opportunities through the World Wide Web and other electronic sources have revolutionized travel and tourism. Potential vacation sites that can be seen, heard and queried by on-line services are now common place, where once they were only "futuristic" dream.

Many other factors are involved and are influencing the evolution of outdoor recreation in the United States. Cultural identity, greater longevity, increasing single-parent households, shifting cultural and ethnic backgrounds, continuing urbanization, more women in the work force, and shrinking welfare roles are among these factors. Tracking such trends and measuring their influence on outdoor recreation demand and supply will continue to be an important research agenda in the United States.

### 3. A SYSTEM FOR ASSESSING TRENDS

#### 3.1 The development of the system

In 1958 the first national assessment of outdoor recreation in America was initiated through the Outdoor Recreation Resources Review Commission (ORRRC 1962). This Commission established the precedent of conducting household "demand" surveys, inventorying resources and services available for recreation, and comprehensively reviewing the literature and hearing from provider and user stakeholders. As recommended by the ORRRC, an agency in the federal government, the Bureau of Outdoor Recreation, later to be renamed the Heritage Recreation and Conservation Service, was established to administer federal assistance grants and to continue the periodic national assessments of the outdoor recreation situation. These assessments were renewed approximately every 5 years until 1980 when the last of the federal Nationwide Outdoor Recreation Plans was published (USDI 1980).

During this time, the United States Forest Service was mandated by new legislation to conduct a national assessment of the overall forest and rangeland situation in the country at 10-year intervals, starting in 1975 (The Forest and Rangeland Renewable Resources Planning Act of 1974 (RPA), P.L. 93-378, 88 Stat. 475). The resulting periodic national assessments of forest and rangelands were to cover all public and private properties and to include an outdoor recreation and wilderness component. In 1981, the author of this paper was assigned on-going responsibility to develop the decennial outdoor recreation assessment that would address this Forest Service mandate for a national forest and rangeland assessment. As will be explained below, undertaking this assignment was based in large part on building upon the lineage of approaches used by the ORRRC and later by the Heritage Conservation and Recreation Service.

The current system for assessing demand and supply trends nationally and regionally consists of the following components:

- A resource, facility and service **inventory** across all providers of outdoor opportunity at county scale,
- **Surveying private land owners** to determine how much of their properties is available for public outdoor recreation uses,
- **Indexing the relative abundance** of opportunities afforded by the geographic distribution of resources, facilities and services,
- **Surveying the American public** to measure activity preferences, participation rates, frequencies, costs, and trip characteristics across outdoor settings,
- **Estimating demand models** for activities and outdoor settings,
- **Projecting future trends** in demand and supply and noting apparent shortages,
- **Interpreting implications** of demand and supply comparisons for management, policy and societal welfare.

### 3.2 The importance of economic analysis for assessing outdoor recreation

Many of the scientists and/or their associates assigned to conduct the national assessment of the forest and rangeland demand and supply situation in the United States are economists. These assessments are often conducted by economists because of the need to understand and model demand and supply trends and predict likely future shifts in markets. Econometric modeling of market conditions and trends enables consideration of factors such as prices, preference shifts, changes in technical substitutes, and production costs. The assessment of outdoor recreation is based heavily upon economics theory and demand modeling methods.

Appropriate theories of economics are at the heart of inventorying and indexing the availability of recreational opportunities. First, consumption behavior is, at its most fundamental level, dependent upon the abundance (or scarcity) and thus the cost of accessing opportunities for participation. For some activities, opportunities are available as personal residential space (yards), local streets and school and park play grounds. For other activities, vast expanses of natural areas, natural streams and wildlife are needed. It is obvious that the former type of opportunities are available at relatively low per-trip costs. The latter type of opportunities are typically much more costly per trip, and for many, prohibitively so. In addition to proximity determined costs, some opportunities are more "taxing" as a result of heavier use and therefore, congestion costs. More people living closer to opportunities usually means heavier use.

To gain greater meaning from the data base that the Assessment team assembles for describing the myriad of federal, state and local government opportunities, and of private sector opportunities, it is useful to index measures of opportunities serving the same or related recreational activities. The Assessment indexing system accounts for both proximity and congestion costs by considering four dimensions of availability:

- **Number of people** living within traveling distance to a geographic subdivision of the Country, e.g., a county (population mass),
- **Proximity distribution** of people living within traveling range of the subdivision (concentration),
- **Quantity of opportunities** for an activity or grouping of similar activities within the traveling range of as well as within the geographic subdivision (gravitational pull),
- **Proximity distribution** of opportunities or attractions within the traveling range (gravitational diffusion).

Opportunity indices are computed by distance decay weighting the number of people potentially competing (living at various distances from) the potential destination area relative to a distance decay weighted inventory of opportunities within and surrounding the destination area. This specification of a recreation opportunity availability index, therefore, captures the relationships between the number and distribution of people living within a recreation market area relative to the quantity and location of recreational opportunities in that market area. This index has been very helpful in evaluating the relative abundance of recreational opportunities of various types to persons living within geographic subdivisions in the United States. Typically indexing is done for county-level subdivisions.

Estimating consumption and demand models for recreational activities and settings is accomplished using survey data representing the incidence and frequency of American's activity participation. In years past the specification of the recreation demand models and model estimation procedures were in part fashioned by extant data. When funding is in short supply, as is usually the case, existing secondary sources must be used. The on-going series of population-wide outdoor recreation surveys, started in 1960, have typically been available. But as conducted in recent years by the U.S. Bureau of the Census, geographic location coding was not released to researchers for either the location of respondents' residences (origin of recreation trips) or the destination of their recreational trips. This lack of geographic identity is due to disclosure regulations and policies relating to the anonymity rights of respondents to federally funded surveys. Absence of origin and destination data eliminates any possibility that a price or trip cost variable can be constructed. Absence of origin data also eliminates any possibility of estimating subnational models for regions.

To meet the need for geographically defined recreation participation and travel data, the Assessment team undertook directly the responsibility for conducting the latest round of the national recreation survey, the National Survey on Recreation and the Environment (NSRE). The most recent NSRE was conducted nationwide to include a sample of approximately 31,000 individuals aged 16 years or over. Included were sections asking respondents to report participation across 67 individual activities and sections for describing their most recent primary purpose trips. The participation questions provided observations of quantity of trips and the last trip questions provided trip characteristics for a sample of trips, including trip costs and destination attributes.

A series of cross-sectional participation models (reduced form consumption models without an explicit price variable) will be estimated from the general participation data for natural resource-based activities. In addition, a series of demand models (price-quantity models) will be estimated from the more specific recreational trip data obtained for a limited set of activities of interest to federal land management agencies. These latter models are possible because the latest national survey, the NSRE, obtained geographic coding of both the origin (residence) and destination (recreation site) for a sample of primary purpose recreational trips.

National and regional participation models will be employed to estimate the relationships between activity participation rates (percentage of the population which participates) and characteristics of both the population (consumers) and the opportunities for activities (resources and services). The computed relationships between participation rates and characteristics of the consumers and the resources will be used as estimates of the effects on recreation consumption of population, demographic and resource trends. The net effect on participation of these trends will be projected into future decades as estimates of possible future consumption of outdoor recreation across the population. To the extent possible, the variables included in the consumption models will reflect the dominate demographic and resource trends predicted for the United States over the next few decades. Participation models will also be used to disaggregate national and regional estimates of participation rates for activities to higher resolution scales--subregional, state and county. These models can further provide estimates of the sensitivity of participation to changes in the availability of natural resources and developments for public use across a range of activities. The recreation opportunity availability indices described above have been very useful as measures of availability in these consumption models.

Demand models will be used to examine the sensitivity of participation intensity (days and trips per year) to price (consumer cost) changes. Increasingly in the United States, participants are being asked to pay a fee for use of recreation sites and services. Increasing on-site costs may reduce consumption for the priced opportunity (depending on own-price elasticity) or increase consumption of close substitutes. Demand models will also be used to estimate the economic value of opportunities. While the philosophical viewpoint on the use of economic analysis in planning and policy making has been changing over the last several years, there is very likely to be continued need and demand for valuations of the direct welfare contributions of recreation services.

#### **4. HIGHLIGHTS OF THE CURRENT DEMAND AND SUPPLY SITUATION IN THE UNITED STATES**

##### **4.1 Demand overview**

In the middle 1980s a presidential commission was established to assess the status of outdoor recreation in the United States. This President's Commission on Americans Outdoors (PCAO 1988) had as one of its primary conclusions that outdoor recreation in America is a maturing market, meaning that consumption growth was declining toward a no-growth rate. As it turns out, the most recent national population survey shows substantial growth in most activities when compared with the previous national survey conducted in 1982-83. These recent trends are described below in Table 1.

Among the activities comparable between the two surveys, the following showed decreases in the number of people who participated one or more times during the 12 months prior to the respective survey:

- Tennis - 29 %
- Hunting - 12 %
- Horseback riding - 10 %
- Sailing - 9 %
- Fishing - 4 %
- Ice skating - %.

Across the preponderance of activities, however, increases were evident between 1982 and 1995. For some activities, these increases were quite substantial:

- Bird watching - 155 %
- Hiking - 94 %
- Backpacking - 73 %
- Downhill skiing - 58 %
- Primitive camping - 58 %
- Attending concerts - 55 %.

**Table 1.** Number and percent change<sup>1</sup> of persons 16 years and older in the United States participating in outdoor recreation by activity, comparing 1982-83 NRS and 1994-95 NSRE estimates.

Activity	Number in 1982-83 (millions)	Percent in 1994-95	Number in 1994-95 (millions)	Percent Change
Bicycling	56.5	28.7	57.4	+1.6
Horseback Riding	15.9	7.1	14.3	-10.1
Golf	23.0	14.8	29.7	+29.1
Tennis	30.0	10.6	21.2	-29.3
Outdoor Team Sports	42.4	26.4	53.0	+25.0
Boating	49.5	29.0	58.1	+17.4
Sailing	10.6	4.8	9.6	-9.4
Motorboating	33.6	23.5	47.0	+39.9
Water Skiing	15.9	8.9	17.9	+12.6
Swimming/pool	76.0	44.2	88.5	+16.4
Swimming/river, lake, or ocean	56.5	39.0	78.1	+38.2
Fishing	60.1	28.9	57.8	-3.8
Hunting	21.2	9.3	18.6	-12.3
Hiking	24.7	23.8	47.8	+93.5
Walking	93.6	66.7	133.7	+42.8
Running/ Jogging	45.9	26.2	52.5	+14.4
Bird Watching	21.2	27.0	54.1	+155.2
Picnicking	84.8	49.1	98.3	+15.9
Sightseeing	81.3	56.6	113.4	+39.5
Off-Road Driving	19.4	13.9	27.9	+43.8
Ice Skating	10.6	5.2	10.5	-0.9
Downhill Skiing	10.6	8.4	16.8	+58.5
Cross-Country Skiing	5.3	3.3	6.5	+22.6
Snow-mobiling	5.3	3.5	7.1	+34.0
Sledding	17.7	10.2	20.5	+15.8
Camping (overall)	42.4	26.3	52.8	+24.5
Developed Area	30.0	20.7	41.5	+38.3
Primitive Area	17.7	14.0	28.0	+58.2
Backpacking	8.8	7.6	15.2	+72.7
Attending a Sports Event	70.7	47.5	95.2	+34.7
Attending an Outdoor Concert or Play	44.2	34.2	68.4	+54.7

<sup>1</sup>Percent change is calculated by dividing the difference in number of participants between the 82-83 and 94-95 surveys by the number of participants in 1982-83.

Note: Between the 1982-83 NRS and the 1994-95 NSRE, the population 16 and over grew by 13.4 % from an estimated 176,653,000 in 1982 to 200,335,000 in 1995.

The activities which showed moderate levels of increase included golf, outdoor team sports, motor boating, swimming in natural waters, walking, sightseeing, off-road driving, cross-country skiing, snowmobiling, developed camping, and attending outdoor sporting events as a spectator. Water skiing, pool swimming, running/jogging, picnicking and sledding showed modest increases over the 13 years between the two national surveys.

One of the most telling statistics about outdoor recreation consumption trends in the United States is the overall percentage of people who report they participated in some form of outdoor recreation in the last 12 months prior to the date they were interviewed. In 1982-83, this percentage was 89 percent. In 1994-95, the overall percentage participating was 94.5 percent. In part, this increase was suspected to be due to improved methods of ascertaining participation in the 1990s survey. Mostly, however, this increase seems to be reflective of a more outdoor active society. At the same time, it is important to point out that substantial numbers of people, while participating in at least one form of outdoor recreation, participate very little. Approximately 23 percent of the U.S. population of persons 16 years old and older fall into the category of persons who are relatively inactive. Among this group are those who reported that they do not participate at all, 5.5 percent.

#### 4.2 Supply overview

Dynamics apparent in the supply situation of the 1990s and beyond in the United States will make this one of the more interesting aspects of the RPA Assessment currently underway. Examination of the data is just beginning and little is available to permit a full overview of the emerging public opportunity trends. Informed speculation suggests the following likely findings:

- **Federal Estate.**--As noted earlier, budgets for most federal resource management agencies in the United States are generally being reduced. For many, however, funding specifically for recreation management has remained stable or even grown somewhat. For only a few, have recreation budgets been reduced. At the same time that federal budgets have seemed overall to grow modestly, costs of providing facilities, sites, and access have gone up rapidly. In part this is due to rising material, operating and labor costs, but also this is due in part to more stringent regulations and expanded planning requirements that necessitate expansion of planning and public relations staffs. Increasingly, on-the-ground operations are carried out by volunteers, without which, very noticeable reductions of site access and services would occur. A strong push is underway to form public-private partnerships as a shared management approach to providing recreation services and opportunities. This trend is likely to continue and probably will increase.
- **State Government.**--Operation of state park systems which occur to some extent in all 50 states of the Country, has been growing somewhat over the last 10 years. Unlike most federal lands and resources, state parks are usually within a modest driving distance of population centers and thus serve a different clientele demand than the more remote federal lands. State legislatures have been holding the line or in some cases reducing appropriations from tax revenues for state park development and operations. Authorization of state lottery systems, however, has boosted available funds in many states, offsetting or in some cases surpassing fiscal conservatism in allocating tax-based funding. Most state park systems charge entrance and special service fees and this source

of revenue also has helped keep the systems operational. Rising costs, as are also facing federal systems, however, are making the operation of these systems increasingly challenging. Exceptions to this fiscal stress on state park systems are those parks and systems which include lodges, resorts and revenue generating facilities such as golf courses and ski resorts. These parks are seeming to continue as healthy systems providing a wide range of opportunities, at least for those constituents able to pay for access.

States also have historically played another role in outdoor recreation supply. With Federal matching grants, states have had active statewide outdoor recreation planning and financial and technical assistance functions aimed at keeping funding, development and management attuned to statewide demand. Coverage across state, local government and to some extent private sector resources and providers, better assured a continuing menu of outdoor opportunities. The demise of federal assistance funding for the planning and assistance functions has resulted in all by a handful of states abandoning inventory-based statewide recreation planning and some tightening of much of the assistance funding from state to local governments. This in turn has led to some reductions in opportunities available in some portions of the opportunity spectrum. State revenues overall, which in large part support state-government outdoor recreation supply, are mostly from income taxation, some sales taxes and increasingly state authorized lotteries.

- **Local Governments.**--Political drift in the USA is moving more and more of publicly provided services and operations from national to local levels. Local governments (city, county and regional levels) provide generally a different portion of the outdoor recreation opportunities within the opportunity spectrum. First, local park and recreation opportunities are almost always very near where people live, especially at the city level. Second, these opportunities include sports facilities and athletic programs (baseball, softball, basketball, tennis, swimming, etc.), youth programs, senior programs, nature centers, inner city parks, and festivals. Neither federal nor state systems provide any significant amounts of these types of opportunities. Local government systems are much more oriented toward serving all levels within our society, from disadvantaged to upper-income suburbanites. Local systems are very likely also to have special population programs integrated into their overall park and recreation program and facility offerings.

Local park and recreation systems are by far the largest category of public sector suppliers in the United States. There are approximately 5,000 recognized park and recreation departments among cities and counties and an uncounted large number of other "programs" in smaller communities integrated within other local government operations, e.g., human services or the school system. Funding at the local level, like the federal and state levels, has been under extreme pressure over the last decade. As more and more of the federal programs are being moved to the state and local level, the pressure on local governments to pick up some services, such as welfare, has put negative budget pressures on all other aspects of their operations, including parks and recreation. Fortunately, corporate sponsorship, rising property values and thus property tax receipts, revenue referendums and gains from state sanctioned lotteries, have helped offset some of the budgetary pressures on local park and recreation systems. Much of the funding for local government comes from property value taxation and from sales taxes. With all factors of change weighed, local systems seem to be stable to growing modestly, keeping pace with rapid population expansion and demand growth.

- **Private Sector.**--Private profit and nonprofit businesses and organizations in the United States are by far the largest sector in outdoor recreation. While not providing as much as the public sector of publicly accessible space and facilities for outdoor recreation, especially of natural resource-based opportunities, the information, technology, services, equipment and associated retail goods and services are incredibly significant in the overall structure of the U.S. economy. Industries such as recreation vehicles, tours, sporting goods, hotels and lodges, resorts, outfitters and guides, travel, and many other industry sectors provide most of the access, facilitation and convenience interface between the outdoor recreation seeker and the managed public and private sector land and water. The commercial aspect of outdoor recreation is one of the main sources of income and employment in many rural economies. Nationally it is estimated that the National Forest System alone (about 200 million acres) contributes close to \$100 billion to the Country's Gross Domestic Product.

Markets for commercial outdoor recreation services, equipment, and sites have been expanding steadily. Population growth, improved information and travel services, aggressive marketing, new technologies, spreading affluence, and demand for natural area experiences and learning opportunities have all fed expansion. An aspect of private sector supply of outdoor recreation opportunities that has not expanded is that of privately-owned rural lands. Two thirds of the land area of the United States is privately owned. Of that total area of approximately 1.6 billion acres, about 1.28 billion acres is rural. Over the years, since 1975, we have been monitoring the level of access to private rural lands (mostly individually and family owned). That monitoring has shown a steady decline in the percentage of those lands that is open to the public for recreation. In 1985, only 23 percent was estimated to be available, except for land that was under lease. The most recent survey indicates further declines due to land owner apprehensions that public users invade their privacy and exact damages to their property.

Often overlooked, but also very important, are the nonprofit organizations' roles in outdoor recreation in the United States. Churches, youth organizations, conservation organizations, private schools and colleges, professional associations and other organizations provide a wide range of facilities and services. While most such organizations have nonrecreation goals as their primary purpose for existence, outdoor recreation programs within their overall program structures often are very significant.

#### 4.3 An observation

The role of government is a very active topic on radio talk shows, in legislative hearings and sessions, in satire and in the media as the United States seeks to balance its federal and state budgets (i.e., eliminate deficits), as distrust of government grows, as the current social wave of greater autocracy makes it way through all portions of society and as people seek to minimize their personal tax burden. It is unclear where all this will end up. Agreement seems widespread, however, that the era of "big government" (whatever that means) has ended. A likely safe assumption about the future would be that reductions of funding for outdoor recreation at federal and state levels will not, in the foreseeable future, be restored. This will put more of the responsibility for providing outdoor recreation on local government and on the private sector. Increasingly federal, and to some extent state governments, are stressing collaborative

management with private partners, profit and nonprofit. While the public does not necessarily support expansion of the private sector role on federal and state lands, such an expansion of shared roles might be the only viable option to meeting public demands for areas and services for resource-based outdoor recreation.

## 5. CONCLUSION

Outdoor recreation is among the most visible and vigorous of social phenomena in the United States. Almost everyone is a participant in some way. Thus everyone is affected by trends in demand and supply of outdoor recreation. Demand has been growing steadily since the end of the Second World War. While some types of outdoor pursuits have leveled off or declined, others have grown and yet others have newly come onto the scene to compete for the public's scarce time and money. The overall effect has been voluminous growth in both the number of people and level of consumption of outdoor recreation. Advertising on television and other media is full of beautiful outdoor settings showing people actively engaging in activities in order to sell beer, automobiles, cigarettes, sports wear, computers, and a wide, endless array of other retail goods and services.

At the same time that demand has been growing at a healthy rate, public sector financed and managed supply, especially at the federal and to a degree at state levels, has been stable or in some instances, declining. This has put pressure on those affected federal and state systems, but it has also increased demand for local government park and recreation systems in unprecedented magnitudes. Non-growing federal and state systems have also sparked new, possibly short-term opportunities for the private sector to meet the demands of the segments of the public which have the income to afford private sector commodities and services. Profit-driven private industries have benefitted greatly from growing demand and shifting supply roles. How this will play out in the future, however, remains to be seen.

In the long run, shrinking access to private rural lands, stable to shrinking roles by federal and state governments, and continuing conversion of natural lands to cultivated or development status is likely to exert increasing influence on the success of the private sector in providing for outdoor recreation in the future. If using outdoor areas and facilities becomes too costly for some of the segments of society who currently participate or if some public areas become too congested to be attractive to these same or to other segments, private sector markets may face significant downward pressures. As seems to happen in the United States periodically (every 10 to 15 years), the time may be nearly at hand when a national coalition of citizen, industry and government interests in outdoor recreation should be assembled to again systematically examine the trends. The last such assemblage was in 1985-86, The President's Commission on Americans Outdoors. It is hoped that the 1998 national Assessment of Outdoor Recreation Demand and Supply Trends, to which this author is assigned, will facilitate this examination.

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