

Southeastern
Equestrian Trails
Conference
Clemson, SC
May 8, 2000



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www.srs.fs.fed.us/recreation
(Athens, GA)

Graphics by Shela Mou

Topics Covered

- **Outdoor Recreation Trends**
- **Outdoor Lifestyles**
- **Riders in the Southeast compared with the Rest of the United States**
- **Opinions about Managing Public Lands**
- **Building Pressures on Public Lands**
- **Observations about the Future**

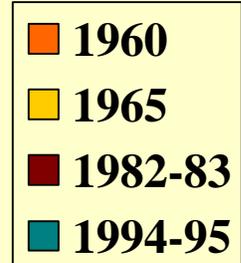
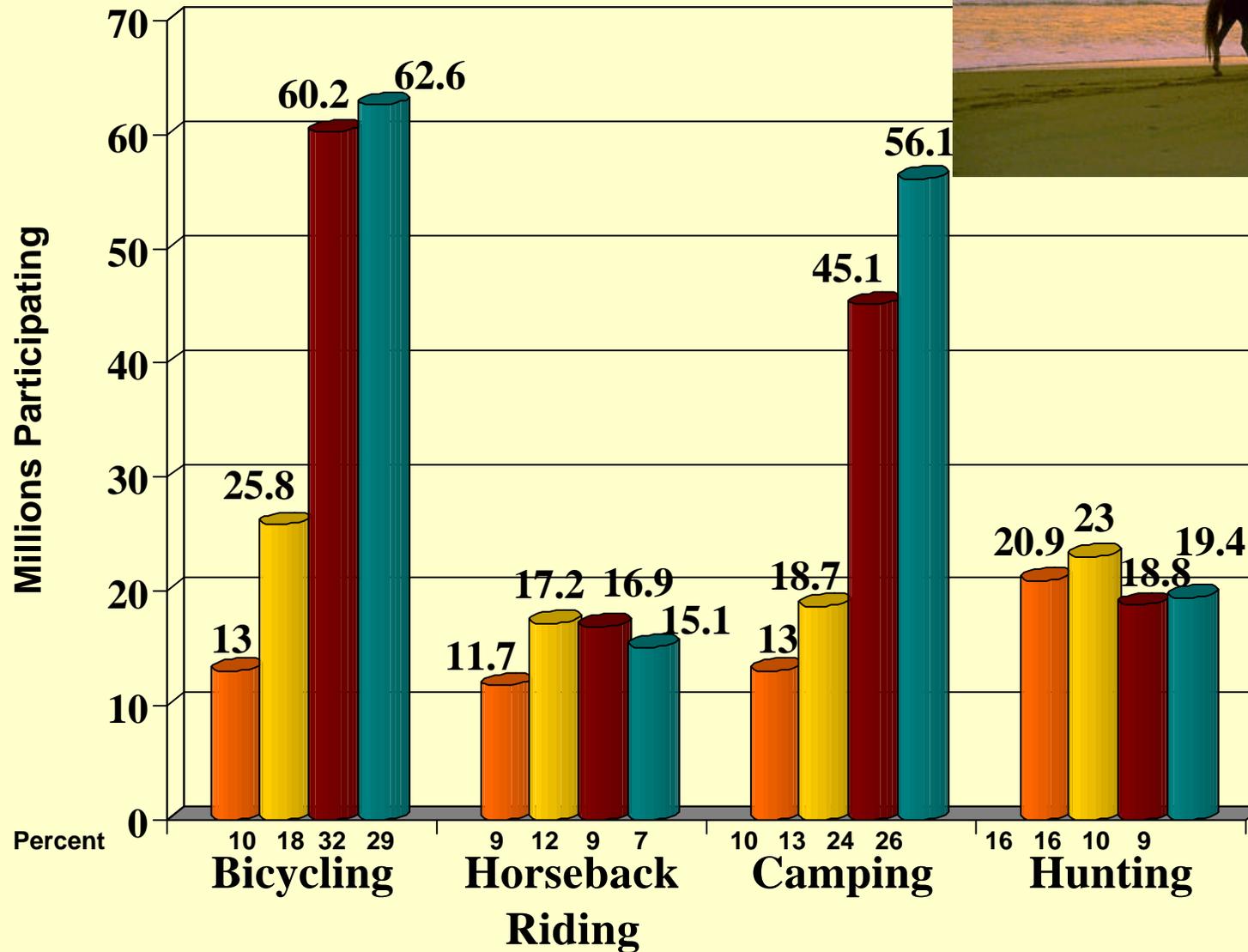
OUTDOOR RECREATION TRENDS

EVER GROWING
SINCE FIRST
MEASURED IN
THE 1960's



Long-Term Activity Trends

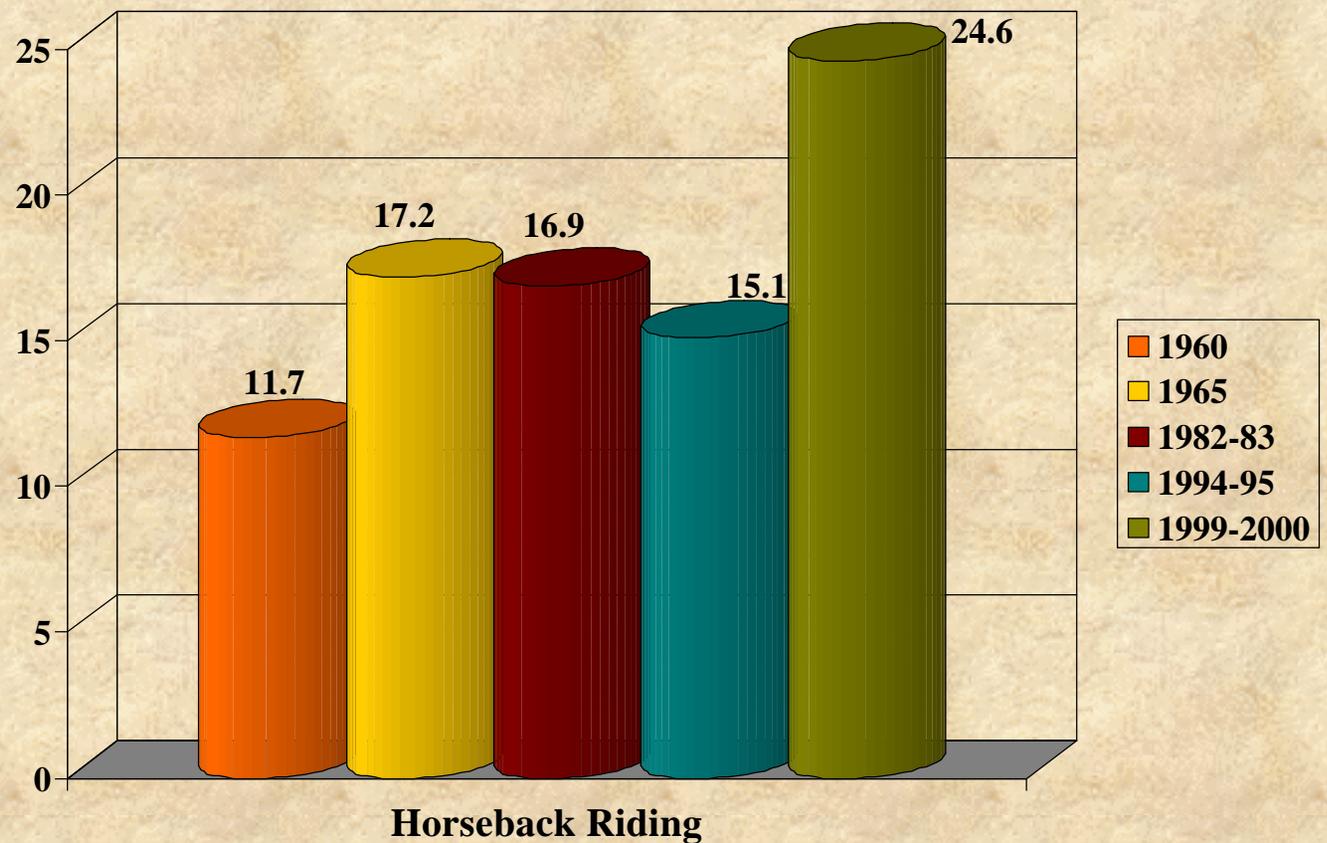
(Persons 12 years and older)
(LAND)



(From 1982-83 to 1994-95, population 12+ grew 14.7%) (Summer participation percentages for 1960 and 1965 were adjusted to annual percentages based on the ratio of annual-to-summer percentages from the 1982-83 NRS)

Long-Term Trends In Horseback Riding

Horseback riding grew rapidly in popularity in the 60's. In the 70's, 80's, and early 90's, there was little growth. In the late 90's, growth has accelerated.



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

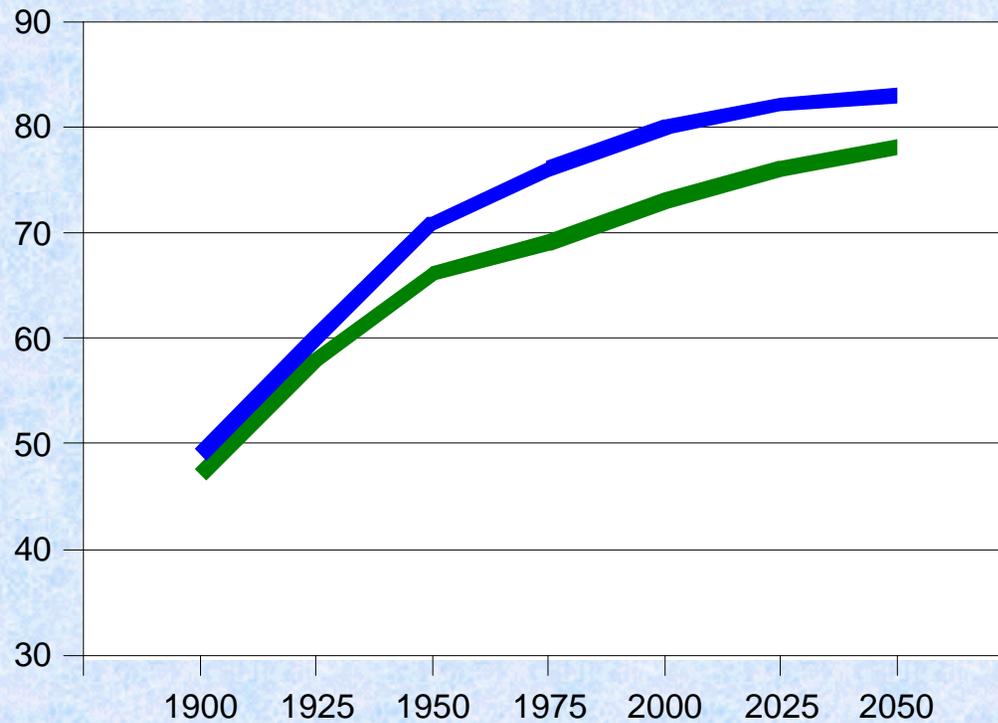
➤ Getting older: Median age 35→38 (by 2020)

➤ Changing ethnicities by 2050:

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

Life Expectancy, 1900-2050

(life expectancy at birth by sex in U.S., 1900-1975, and
middle-series projection, 2000-2050)



Source: Social Security Administration, Office of the Chief Actuary

Varied Lifestyles Varied Lifestyles

Activity	Percent Participating Regularly				
	North	South	Great Plains	Rocky Mtns	Pacific Coast
Creative arts	27.2	23.9	23.9	25.6	29.0
Crafts	27.2	27.3	27.8	32.3	30.4
Collecting things	26.1	29.8	26.7	24.3	25.6
Playing stock market	24.2	23.0	20.1	20.4	21.8
Grow a garden	32.8	30.6	34.5	30.4	33.6
Cook at home	79.9	76.9	80.4	84.0	84.5
Raise kids	44.6	47.0	46.2	42.2	44.3
Care for pets	56.7	59.5	60.3	62.0	60.3
Run own business	14.5	17.5	15.4	23.6	21.0
Commute >45 minutes	16.1	16.6	12.6	11.8	14.9

Fastest Growing One-Half

Recent Trends

(Millions of Participants, 16 and Older)

Activity	Number in 1983	Number in 1995	Number in 2000	Percent Change (83-2000)
Backpacking	8.8	15.2	27.9	+ 217.1
Hiking	24.7	47.8	69.8	+ 182.6
Snowmobiling	5.3	7.1	10.7	+ 101.8
Walking	93.6	133.7	172.3	+ 84.1
Downhill Skiing	10.6	16.8	19.3	+ 82.1
Off-Road Driving	19.4	27.9	35.0	+ 80.4
Bird Watching	21.2	54.1	38.2	+ 80.2
Swimming/river, lake, or ocean	56.5	78.1	94.8	+ 67.8
Camping - Primitive Area	17.7	28.0	25.8	+ 45.8
Motorboating	33.6	47.0	48.2	+ 43.5
Camping - Developed Area	30.0	41.5	41.3	+ 37.7
Sightseeing	81.3	113.4	108.6	+ 33.6

The Rest of the Story

**Recent Trends
(Millions of Participants, 16 and Older)**

Activity	Number in 1983	Number in 1995	Number in 2000	Percent Change (83-2000)
Cross-country Skiing	5.3	6.5	8.8	+ 66.0
Boating (overall)	49.5	58.1	76.7	+ 54.9
Bicycling	56.5	57.4	86.2	+ 52.6
Horseback Riding	15.9	14.3	23.1	+ 45.3
Picnicking	84.8	98.3	118.3	+ 39.5
Fishing	60.1	57.8	67.9	+ 12.9
Sailing	10.6	9.6	10.9	+ 2.8
Water Skiing	15.9	17.9	15.7	- 1.3
Hunting	21.2	18.6	20.9	- 1.4

Forecasts

Projected Demand to 2020

Activities	Millions Participating (1995)	Indexed Change (Base year is 1995)		
		People	Days	Trips
<u>Land-Based</u>				
Sightseeing	113	1.32	1.43	1.43
Non-consumptive wildlife	117	1.29	1.09	1.15
Biking	57	1.28	1.25	1.45
Family Gatherings	124	1.24	1.23	0.83
Hiking	48	1.23	1.24	1.23
Horseback Riding	14	1.23	1.22	1.29
Rock Climbing	8	1.21	1.15	1.03
Walking	134	1.21	1.29	--
Camping	42	1.19	1.36	1.30
Backpacking	15	1.11	1.15	1.08
Off-Road Driving	28	1.05	0.99	1.06
Hunting	19	0.91	0.99	1.03

Forecasts

**Horseback
Riding and
Outdoor
Recreation
Lifestyles**

Outdoor Recreation Styles

A background image showing two people in a wooded area. One person is standing and looking towards the other person who is sitting on a bicycle. There are several other bicycles parked on the ground. The scene is outdoors with trees and foliage in the background.

Sports Hogs (9%)

Individual and Team Sports

Winter Sports

Boating and Swimming

Sports Spectators

Mountain and Rock Climbing

Biking and Horseback Riding (32%)

Fitness Buffs (12%)

Running and Walking

Biking

Swimming

Do Not Hunt or Fish

Nature Lovers (14%)

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

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.

Enthusiasts

Selected Activities	This number of days per year or more	Percent of U.S. population	Percent of U.S. total days
Horseback riding	6	2.3	94
Bird watching	50	9.1	91
Off-road driving	14	4.5	87
Hiking	10	7.1	83
Biking	30	7.4	80
Developed camping	8	6.3	76
Downhill skiing	6	2.6	74
Canoeing	4	1.8	73

**Riders in the
Southeast
Compared with
the Rest of the
United States**

Percentage of People 16+ Who Ride

	<u>Southeast</u>	<u>Rest of U.S.</u>
Riding/Equestrian	10.5	12.2
Trail Riding	8.8	9.9

Southeast = MS, AL, TN, KY, VA, NC, SC, GA, FL.

Age of All Riders Compared with Trail Riders



	Percentages			
	<u>Southeast</u>		<u>Rest of U.S.</u>	
	<u>All Riders</u>	<u>Trail Riders</u>	<u>All Riders</u>	<u>Trail Riders</u>
16-30	38	39	31	31
31-50	49	49	50	51
51+	13	12	19	18
All Ages	10.5	8.8	12.1	9.8

Percentages of Riders Who Are Men or Women



Percentages

	<u>Southeast</u>		<u>Rest of U.S.</u>	
	<u>All Riders</u>	<u>Trail Riders</u>	<u>All Riders</u>	<u>Trail Riders</u>
Men	47	44	47	46
Women	53	56	53	54

Education of All Riders Compared to Trail Riders



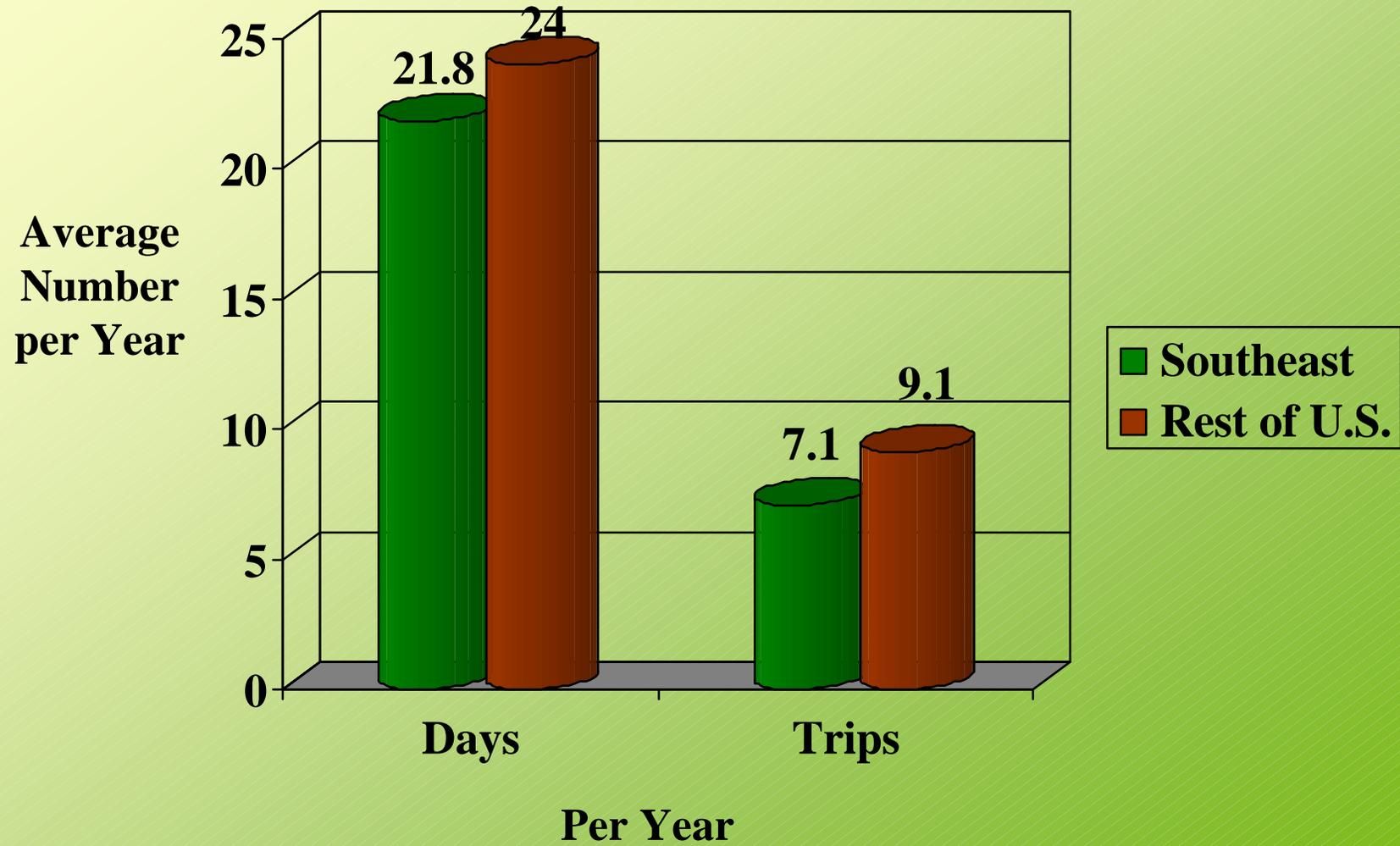
Percentages

	<u>Southeast</u>		<u>Rest of U.S.</u>	
	<u>All Riders</u>	<u>Trail Riders</u>	<u>All Riders</u>	<u>Trail Riders</u>
11 th or less	13	12	11	11
HS Grad/Some College	50	49	53	52
Bachelors/Professional	29	31	26	26
Masters/Doctorate	8	8	10	11

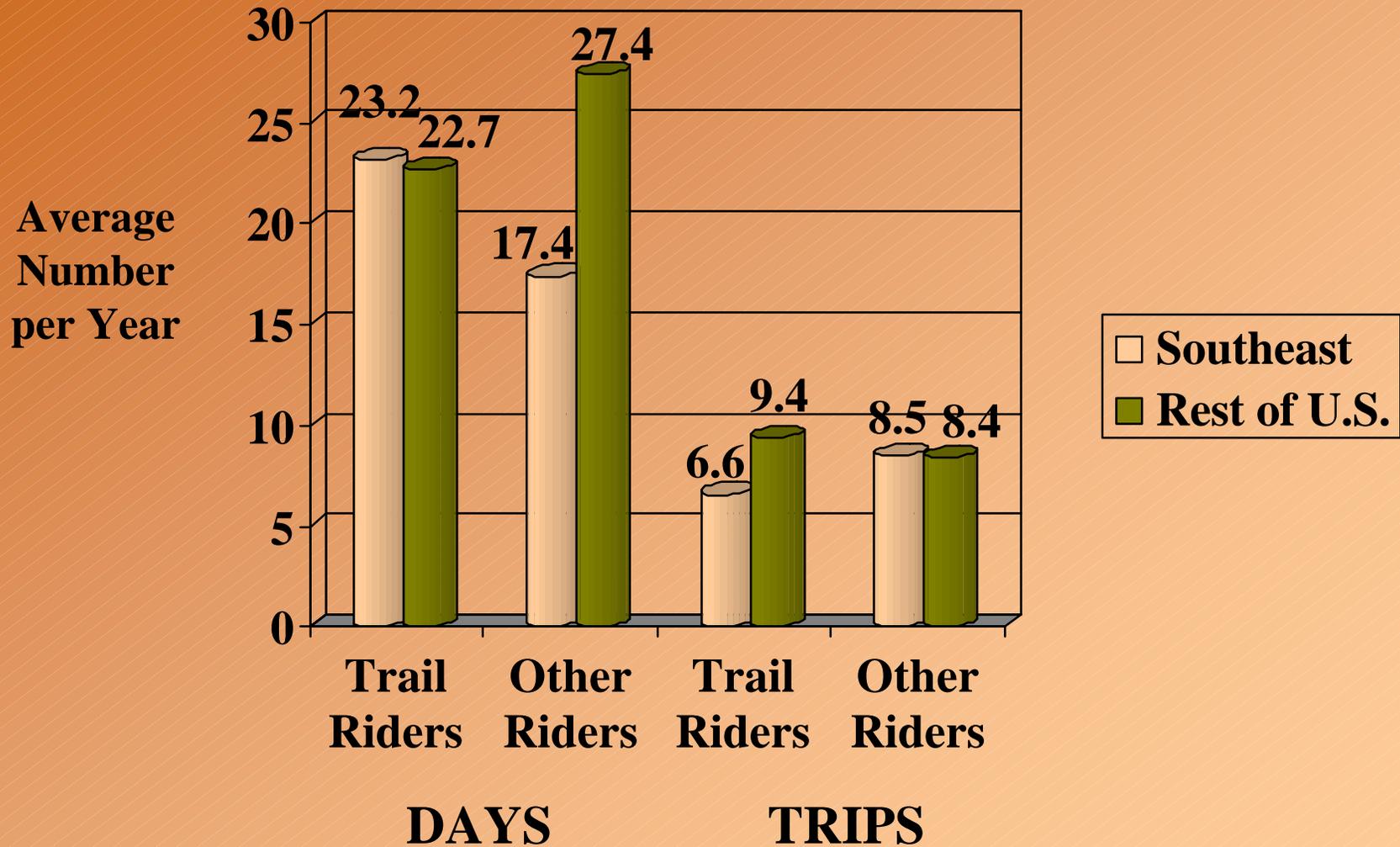
Other Recreation in which Riders Participate

<u>Activities</u>	<u>Percentage of Riders Participating Southeast</u>	<u>Rest of U.S.</u>
Walking	93.2	89.2
Nature Center	72.2	68.5
Sightseeing	72.2	62.9
Fishing	58.6	53.0
Visit a Wilderness area	54.9	57.3
Bicycling	49.6	55.4
Motor Boating	47.4	41.8
Visit A Beach	45.9	46.9
Hiking	42.9	50.0
Hunting	28.6	28.7
View Birds	24.8	26.7
Canoeing	16.5	22.2

Days and Trips Per Year



Days and Trips by Trail Riders and Other Riders



Level of Participation

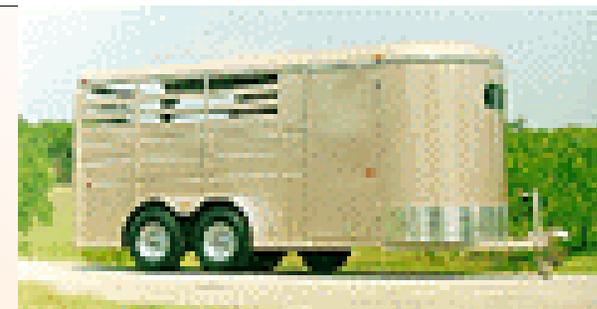
Average Days per Year

	Lowest 1/3	Middle 1/3	Enthusiasts
Southeast	1.0	3.2	69.4
Rest of U.S.	1.0	2.9	64.8

Comparing Demographics between Enthusiasts and Other Riders in the Southeast

AGE	<u>16-24</u>	<u>25-49</u>	<u>50+</u>	
Enthusiasts	36.1	53.9	10.1	
Other Riders	31.7	60.8	7.5	
Trail Riders	36.8	58.3	5.0	
	<u>Men</u>	<u>Women</u>		
Enthusiasts	43.1	56.9		
Other Riders	48.2	51.6		
Trail Riders	49.6	50.4		
	<u>White</u>	<u>Non-White</u>		
Enthusiasts	99.1	0.9		
Other Riders	98.1	2.0		
Trail Riders	98.5	1.5		
INCOME	<u><25K</u>	<u>25-50K</u>	<u>50-100K</u>	<u>100K</u>
Enthusiasts	14.4	18.9	48.0	18.6
Other Riders	13.9	22.4	40.9	22.8
Trail Riders	17.0	21.7	39.3	22.0

Trips For Horseback Riding



<u>Ownership</u>	<u>From Home</u>	
	<u>Within 1 hour</u>	<u>More than 1 hour</u>
Private	66.7	55.1
Someone's land	48.2	25.9
Resort	33.3	66.7
Other	18.5	7.4
Government	29.6	38.8
Local/State	33.3	10.5
Federal	41.7	73.7
Other	16.7	10.5

Riding Trips by Setting

From Home	Developed Site	Along Roads	Away Roads	>3 miles from Roads
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Within

1 hour

13.6

8.6

76.5

14.3

More than

1 hour

14.3

2.4

81.6

31.7

Are We Spending Too Much or Too Little on the Environment?

	<u>Percentages</u>	
	<u>Southeast</u>	<u>Rest of U.S.</u>
Riders		
Too much	4.0	6.8
Right or Too Little	71.8	67.8
Others		
Too much	6.0	7.2
Right or Too Little	68.3	66.8

**Opinions About
Managing Public
Lands and
Environmental
Attitudes**

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%)

Some Selected Values Concerning Public Lands

	Percentage Strongly Agreeing				
	North	South	Great Plains	Rocky Mtns	Pacific Coast
People should be more concerned about how our public lands are used	85	87	76	78	81
Future generations should be as important as current ones in decisions about public lands	78	74	73	61	74
People can think public lands are valuable even if they do not actually go there themselves	76	76	79	63	69
Wildlife, plants, and humans have equal rights to live and grow	62	65	54	62	60

Source: NSRE/Shields VOBA Module

**Limit Visitors
If Too Crowded**

= 89%

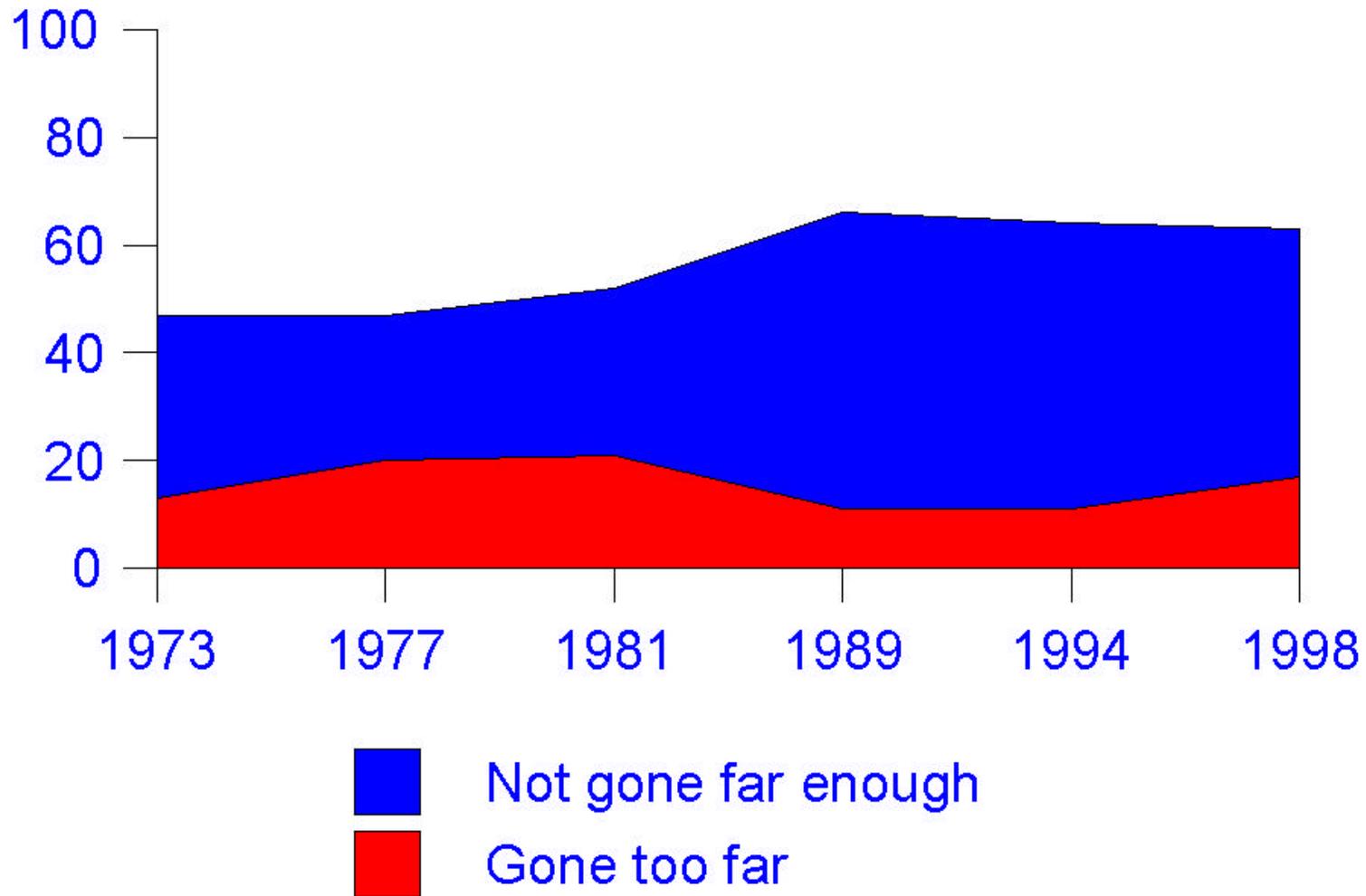
**Limit Visitors
If Resources
Being Harmed**

= 95%

Public Views on Wilderness

- **Nationally about 1/2 of American's 16+ report knowing about the NWPS**
- **Only 4.4% feel we have put too many acres into the NWPS:**
 - **Not enough, 52.6%**
 - **About right, 26.9%**
 - **Too much, 4.4%**
 - **Not sure, 15.4%**

Environmental Protection Laws and Regulations Have:



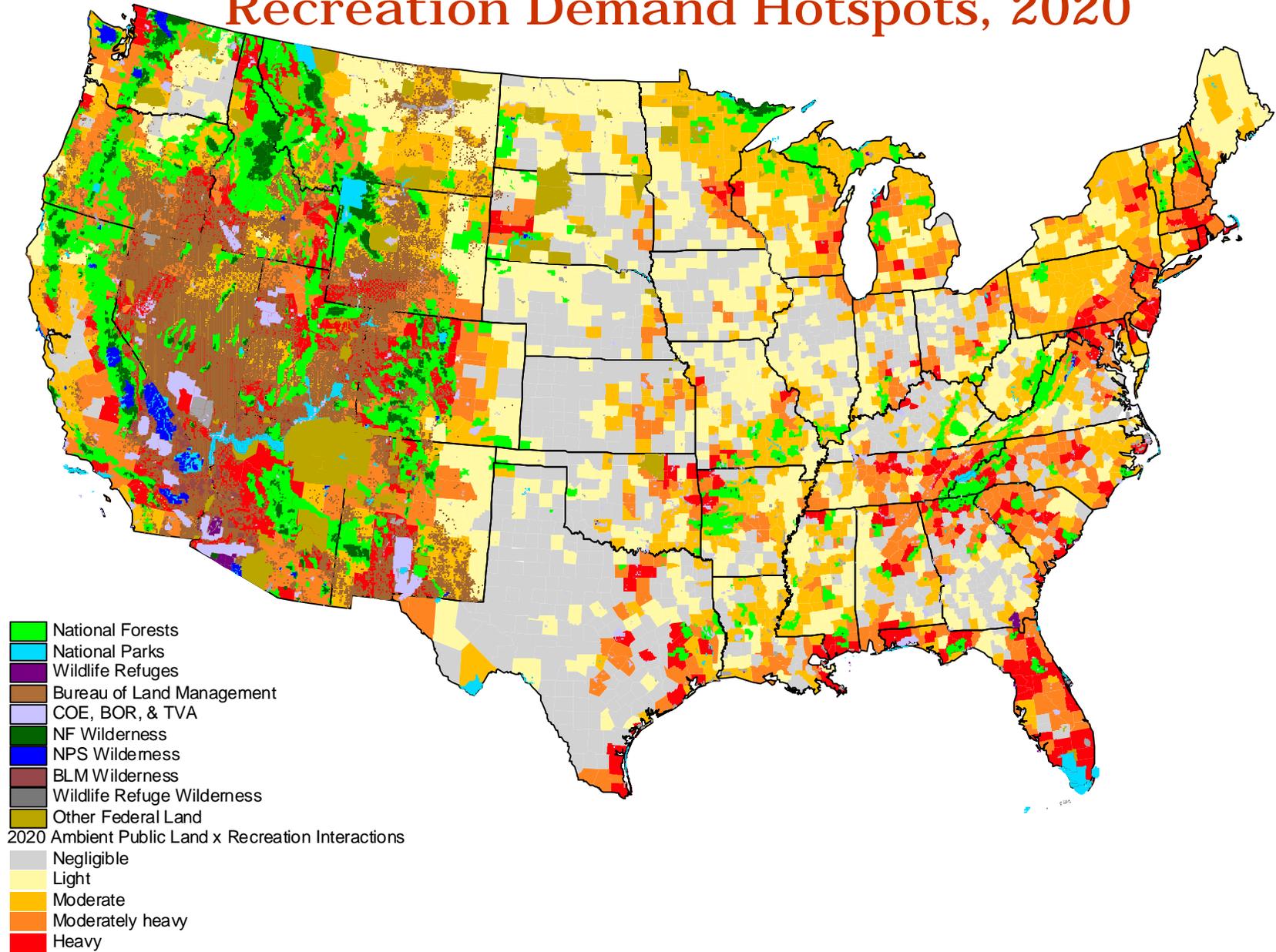
Source: Roper Organization, 1990; Times Mirror, 1994; NEETF, 1998.

Spending on the Environment

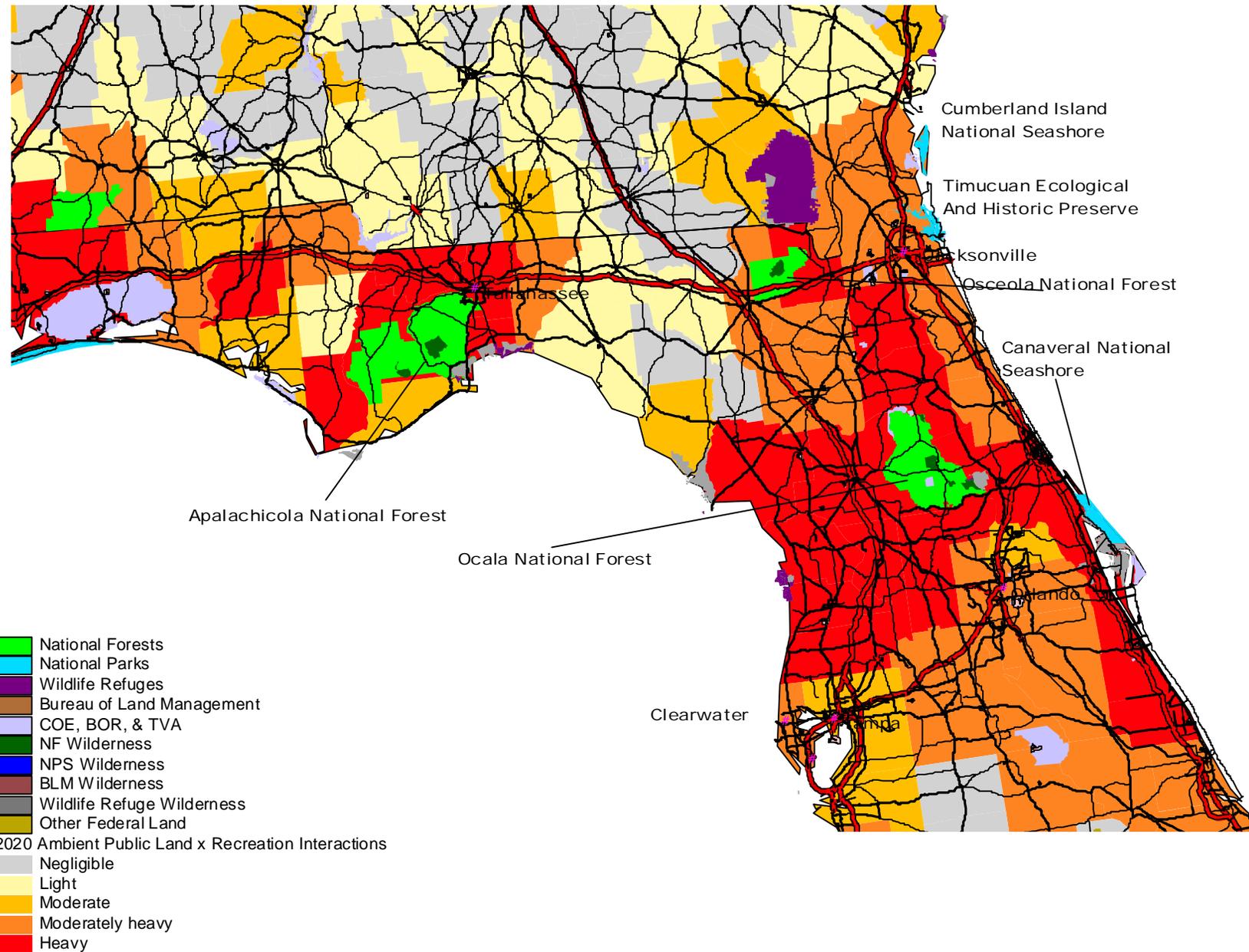
Too Much	7%
Too Little	49%
About Right	28%
(Don't Know)	(15%)

Recreation Pressures on Public Lands

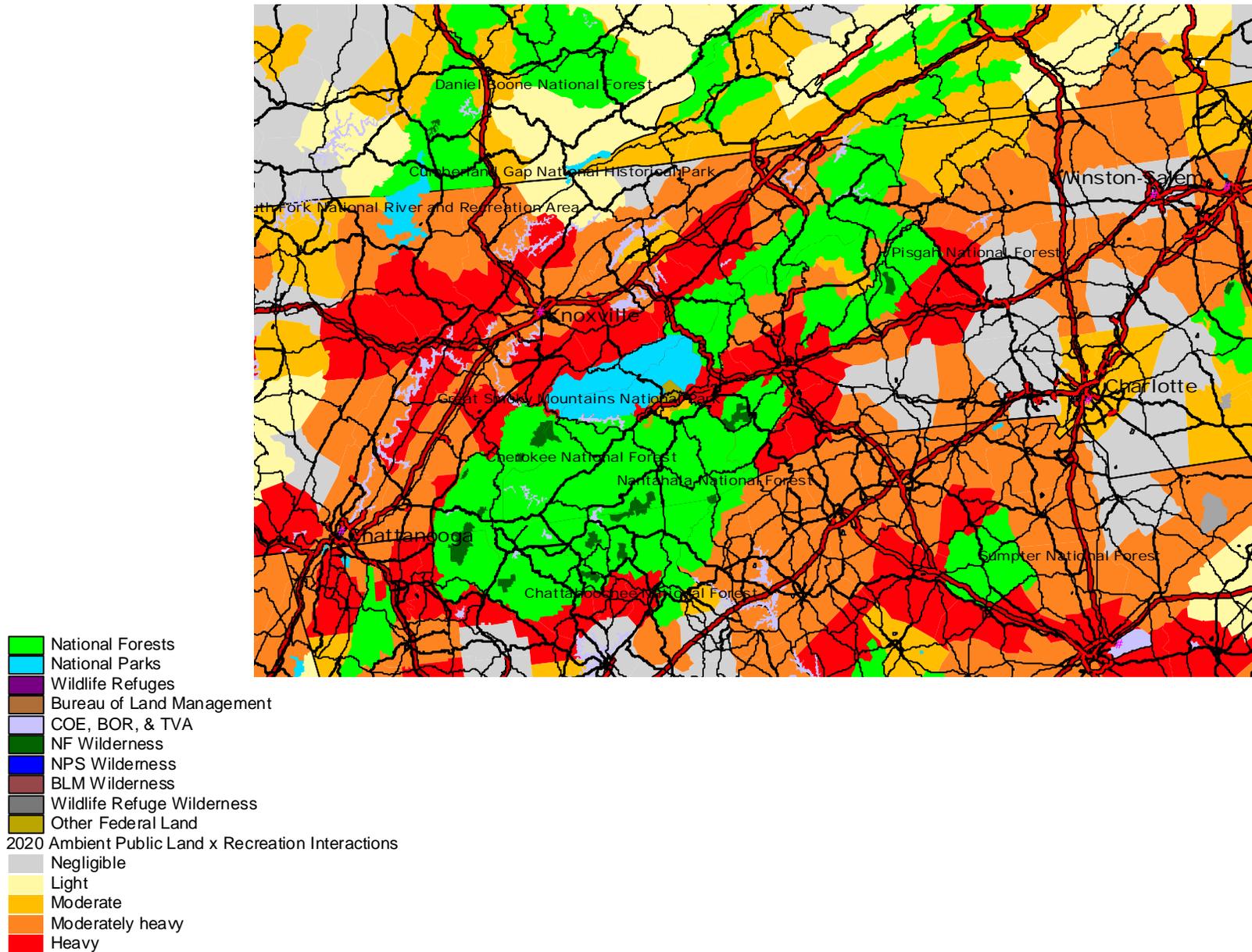
Public Lands Overlaid onto Projected Recreation Demand Hotspots, 2020



Public Lands in North Florida and Projected Recreation Demand Hotspots, 2020



Public Lands in Western North Carolina and Projected Recreation Demand Hotspots, 2020



SUMMARY

- Outdoor recreation is growing as this country's population grows and changes
- In the last few years, there has been a resurgence in growth of horseback riding
- Horseback riders fit best within the Outdoor Avids and Sports Buffs lifestyles
- About 80 percent of horse riders do some of their riding on trails
- Trail riders are a little younger, more are male, and have a bit more education than other riders

SUMMARY

- Riding enthusiasts account for 94 percent of all days of riding!
- Enthusiasts are more women than men and most earn over \$50K per year
- Most riding trips are to private lands; trips to public lands increases with trip length (mostly to federal lands)
- On federal lands, riding is mostly off roads, but relatively close to roads (< 3 miles)
- Like most people in the United States, horseback riders care very much about our environment

SUMMARY/ OBSERVATIONS

SUMMARY

- Riders, people in the South and people across the U.S., want to protect our public lands
- Protection, non-motorized uses, and trails on public lands are important in everyone's eyes
- Future demands will grow throughout the U.S., Southeast included

OBSERVATIONS

- At least one thing is certain, the future will not be the same
- Many different people wanting different things will make public land management ever more challenging
- Only through effective collaboration; riders, managers, organized groups, etc., will be successful in sustainably managing public lands

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