

# Outdoor Recreation In America 1998<sup>©</sup>

Prepared For:  
**The Recreation Roundtable**  
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**R O P E R  
S T A R C H**

**TURNING DATA INTO INTELLIGENCE WORLDWIDE<sup>SM</sup>**

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## Introduction

This 1998 report highlights the fifth annual national survey performed for The Recreation Roundtable. This year's report is based on 2,009 in-person interviews with Americans 18 and older conducted in their homes during the period of March 7 to March 21, 1998, plus a second round of 1,974 surveys conducted between April 4 and April 18, 1998. The aim of the research is two-fold: to gauge current participation patterns in and satisfaction with outdoor recreation in America, as well as to trend the quality of outdoor recreation over time.

For the purposes of this study, outdoor recreation has been defined as leisure activities that involve the enjoyment and use of natural resources. Included on the list of 36 outdoor recreation activities presented to respondents are pursuits which range from popular forms like walking, swimming, and running, to other less-prevalent activities such as photography, sailing, and snowmobiling.

To track the state of outdoor recreation from year to year, a Recreation Quality Index (RQI) was created in 1995. The RQI is a composite score which measures the vitality of outdoor recreation in the nation. This measurement takes into account Americans' *opportunity* for outdoor recreation, their *actual participation* in outdoor recreation activities, and finally, their *satisfaction* with their recent outdoor local and vacation experiences.

The benchmark RQI was established as 100 in 1994. The index climbed to 107 in 1995, 109 in 1996, and then last year dropped five points to 104. For 1998 the RQI has remained nearly unchanged compared to 1997 at 105. This report looks to analyze the reasons for this year's performance by highlighting both the successes and challenges facing outdoor recreation in America today.

This year's research continues a focus on the involvement of today's children in outdoor recreation as compared to prior generations. Additionally, this year's report looks at the public's attitudes regarding the involvement of corporations in helping to fund repairs and expansion of recreation facilities and services in our parks and public recreation areas.

The expanded 1998 study was conducted with the corporation of key federal agencies: the Bureau of Land Management, the Bureau of Reclamation, the Forest Service, the Tennessee Valley Authority, the Federal Highway Administration and the U.S. Army Corps of Engineers.

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## Summary

Outdoor Recreation in America: 1998 documents the pervasive and valuable roles recreation plays in our society. The 1998 survey indicates that more people are recreating more frequently, increasing participation in both traditional and new outdoor leisure activities. Nearly six in ten Americans participate in outdoor recreation at least monthly. Their motivations for participation vary, but the top objectives are fun, relaxation, stress relief, experiencing nature and exercise. Not only do Americans find that recreation meets these goals but they also derive a broader benefit. Americans who recreate frequently are notably happier with their lives than are other Americans: among active recreationists, the one in five Americans who recreate at least twice weekly, 45% report "complete satisfaction" with their overall quality of life and 49% report being "fairly well" satisfied. Among all Americans, the comparable percentages were 34% and 53%.

The annual survey conducted for the Recreation Roundtable documents perceptions regarding recreation opportunities, participation and satisfaction with recent experiences. These findings are then used to develop the Recreation Quality Index (RQI) overall and for the most popular outdoor recreation activities. The overall RQI advanced by one point to 105, about midway between the base year of 1994 (100) and 1996, when the RQI reached 109. Although the overall RQI changed little, its components saw noteworthy movement. Participation increases are offset by a decline in the public's satisfaction with their experiences. Perceived opportunities for recreation changed only slightly.

Higher recreation participation and satisfaction correspond with higher income and education levels, but there are also regional differences. The Midwest continues to lead in recreation participation and satisfaction. Satisfaction with recreation experiences declined principally in connection with vacation recreation sites and came from "middle America." Significant declines were reported by those aged 30-44, by those with incomes of between \$30,000 and \$50,000 and by parents of children between the ages of 8 and 17.

For the third year, the survey looked at awareness and use of recreation sites operated by various federal agencies. Awareness showed a slight increase from 1997, although awareness of sites managed by the BLM dropped back after a sharp rise in 1997. About one in three Americans visited a federal outdoor recreation site over the past twelve months, with most reporting visits to National Park Service sites. Based upon actual visitor counts, it appears that many Americans believe they are visiting a national park when they are enjoying sites operated by other federal agencies. Visitors to federal recreation sites continue to believe that they receive good value for the fees they pay. In fact, Americans would have been willing to pay an average of \$9.20 in additional fees for their most recent visit to a federal recreation site - a decline from previous years that is likely to reflect higher fees now being charged in many parks and forests. Only 15% of those who have visited a federal recreation site in the past twelve months responded that they would have been unwilling to pay any additional fees. And the most active recreationists - who are also frequent visitors to federal sites - express a willingness to pay higher fees: an average of \$10.20.

The 1998 survey sought to test variations in support for fees charged in conjunction with different services and opportunities. Fees to cover the costs of trailhead parking areas are more popular than fees for visitor centers, for example. A majority of the public supports either fee-based funding or a combination of fees and general tax revenues for most recreation opportunities.

Americans welcome experimentation with programs which attract corporate support for recreation programs - 7 out of 10 support such efforts. By a margin of nearly 10:1, respondents believe that corporations should be encouraged to adopt trails and visitor centers, just as many corporations now adopt stretches of roadways to fight litter. Fewer than one in four Americans would prefer to pay higher fees than attract corporate support for parks and recreation program funding needs, although one in three Americans express concern that attracting corporate support will result in too much commercialization of recreation sites.

Finally, the 1998 survey sought to measure overall public satisfaction with the opportunities provided by lands associated with seven federal agencies. While actual visitors to federal sites were very pleased with the choices they had among destination sites, other aspects of their visits received good-but-not-excellent ratings. Overall quality and cleanliness was rated as excellent or very good by 69% of all respondents; the quality of services received was ranked excellent or very good by 62%. The value of the experience for the fees paid received the lowest percentage of excellent and good rankings: 59%. Respondents reported a difference in their experiences by federal agency. For example, the Forest Service and BLM earned higher ranks than other federal agencies for the amount and diversity of activities and instructional programs available to visitors. These two agencies were also rated higher in the value of the experience received for the fees paid.

## SECTION I: The Recreation Quality Index (RQI): Measuring Outdoor Recreation in America Over Time

When developing the RQI for a given year, three components are used to arrive at the composite score:

- First, the **opportunity** which Americans have to take part in various forms of outdoor recreation. This is measured by whether Americans feel they have enough local parks, public waters and recreation sites available to them in their community, and whether they have a sufficient number of choices when it comes to parks and recreation areas available for outdoor recreation vacations. The public's perception of whether the quality of their local outdoor recreation opportunities is improving is also taken into account in this component of the RQI.
- The second area of focus involves measuring Americans' actual **participation** in various forms of outdoor recreation. This includes whether the public takes part in outdoor recreation activities at least once a month, whether they are more or less likely to engage in outdoor recreation next year, whether they have taken an outdoor recreation vacation in the past year, and finally, whether they are more likely to take an outdoor recreation vacation in the coming year.
- The last component of the RQI involves Americans' **satisfaction** with both their local outdoor recreation experience, and their outdoor recreation vacation experience; more specifically, whether they are satisfied with the value that they get for the costs involved (admission and parking), the amount of activities and instruction available, and the quality of service from park management and employees.

### The RQI Remains Relatively Unchanged

The overall RQI, a reflection of the state of outdoor recreation for the nation as a whole, has remained stable since a year ago. The RQI, which stood at 104 in 1997, has remained essentially unchanged at 105 in 1998. Despite the overall lack of change in the RQI, there have been some shifts in the components which make up the RQI.

- The one-point increase in overall RQI is most directly linked to the increase in actual participation in outdoor recreation activity. Last year, the participation component of the RQI stood at 94, an eleven-point decrease from 1996. This year, the participation score rebounded to the 1996 level of 105. This is the main reason for the stability in the overall RQI.
- Americans perceive their opportunities for outdoor recreation as stable. The opportunity component of the 1998 RQI actually decreased by two points to 100, or identical to the benchmark year of 1994.
- Americans' satisfaction with their outdoor recreation experiences dropped. The satisfaction component of the RQI index stands at 110, down from 117 in 1997 and down from 120 in 1996. The decline in this component is the major reason for the lack of a substantial increase in the RQI in 1998. Because of the importance of the satisfaction component - had it remained at 117, as in 1997, the overall RQI would have improved three points to 107 - it bears careful watching in future studies.

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## Recreation Quality Index

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|      |             | RQI COMPONENTS    |                     |                    |
|------|-------------|-------------------|---------------------|--------------------|
| Year | Overall RQI | Opportunity Score | Participation Score | Satisfaction Score |
| 1994 | 100         | 100               | 100                 | 100                |
| 1995 | 107         | 99                | 103                 | 119                |
| 1996 | 109         | 101               | 105                 | 120                |
| 1997 | 104         | 102               | 94                  | 117                |
| 1998 | 105         | 100               | 105                 | 110                |

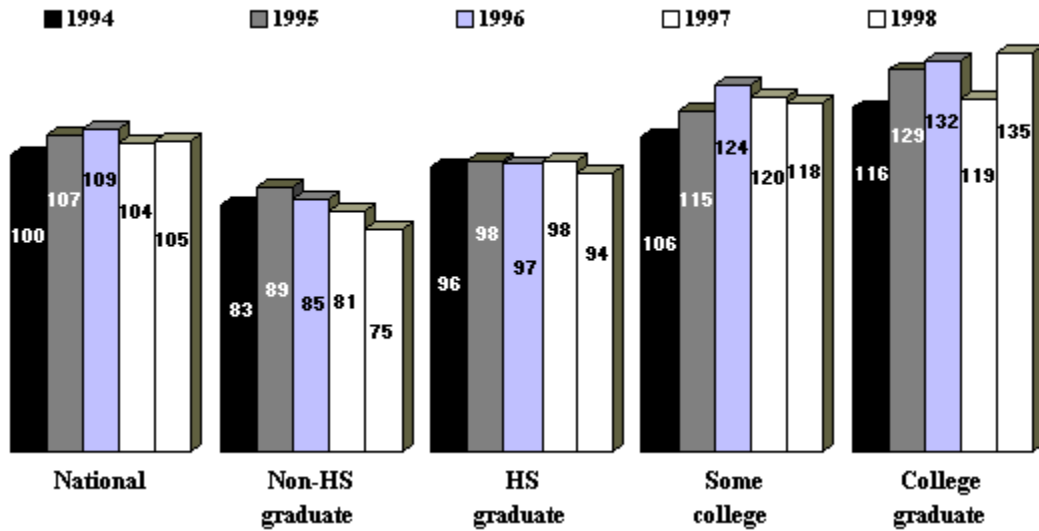
*Note: The overall "RQI" represents an average of scores for opportunity, participation, and satisfaction with outdoor recreation in general. These sub-scores are derived by indexing key questions against the benchmark year of 1994, which is set at 100.*

- After experiencing an 8-point drop in 1997 to an RQI of 99, this year the women's RQI regained 4 points to 103. This increase results in reducing the 11-point gender gap measured in 1997 to 5 points in 1998.
- As seen in previous years, the RQI continues to increase steadily as both education level and annual household income increase. Educated and wealthier Americans tend to be more active, satisfied outdoor recreationists. This finding is consistently corroborated by other Roper survey data, which show that more affluent and educated Americans display higher levels of satisfaction with both their lives and the activities in which they participate.
- Those with incomes of \$75,000 plus and those with a college education have consistently scored the highest RQI's. In both cases, the 1998 RQI increased significantly: up 8 points to 146 households with incomes of \$75,000 and more and up 16 points to 135 for college graduates. On the other end of the income and education scale, those with incomes lower than \$15,000 and those without a high school diploma have RQI's of 77 and 75, respectively. Those with the least education have continued a 4-year downward trend on the RQI (and down 6 points versus 1997), while those with the lowest incomes have rebounded (up 9).
- One of the largest declines in the RQI for 1998 was reported by African Americans. Their 1998 RQI was just 67, down 9 points. The low RQI reflects a very low recreation participation RQI component, a score 22 points lower than America's seniors, with a 89 RQI participation component.

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## RQI: Related To Education Attainment

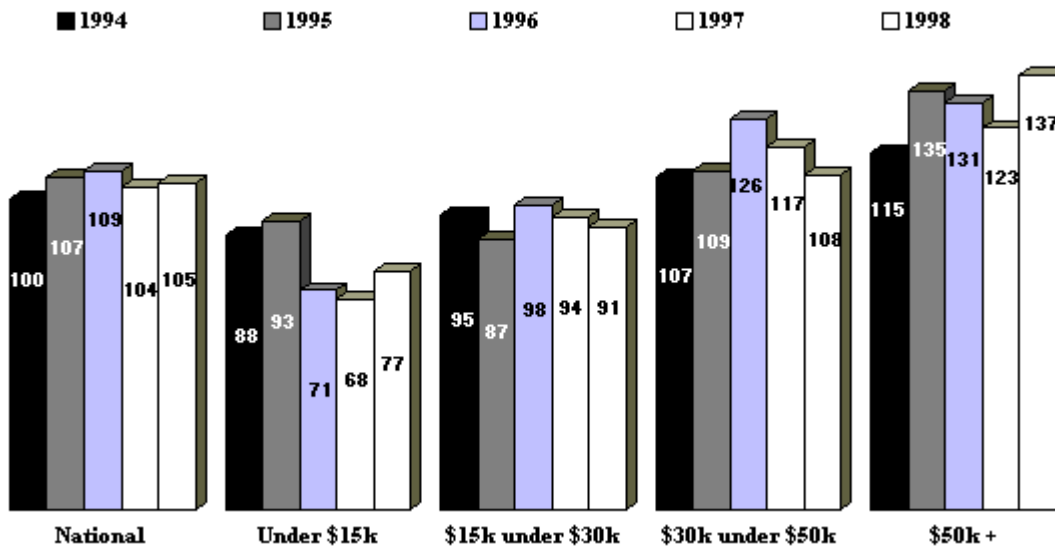
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## RQI: Related To Income

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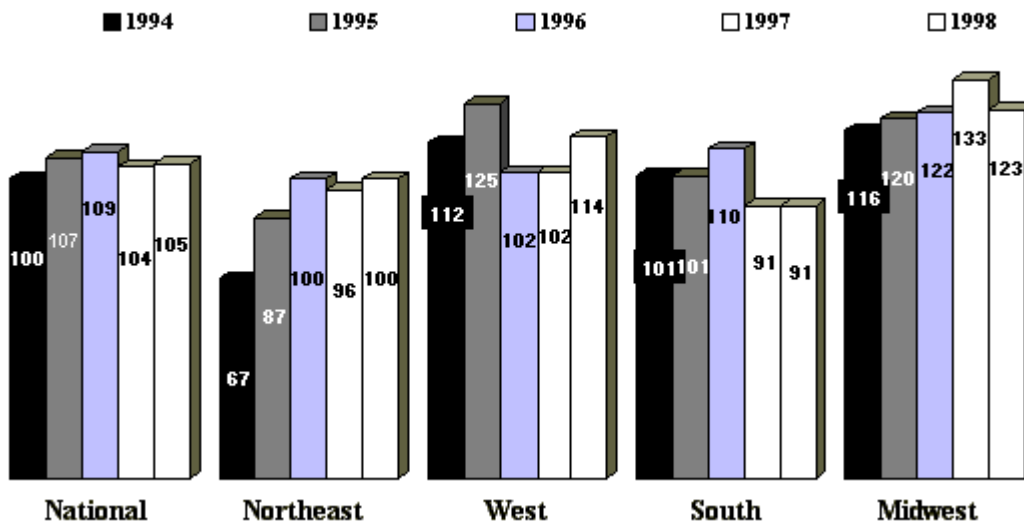


- Despite a decline of 10 points in their RQI to 123, the Midwest continues to lead the nation in outdoor recreation, as it has for four of the five years. The West, on the other hand, experienced a 12-point increase to 114, firmly establishing its second place position. The Northeast, retained its third place position with an RQI of 100. The South remaining in last place with an unchanged RQI of 91. Because of the sample size for each region (averaging 500 persons), the margin of error for regional RQI is higher than that for the overall sample.

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### RQI Remains Highest In The Midwest

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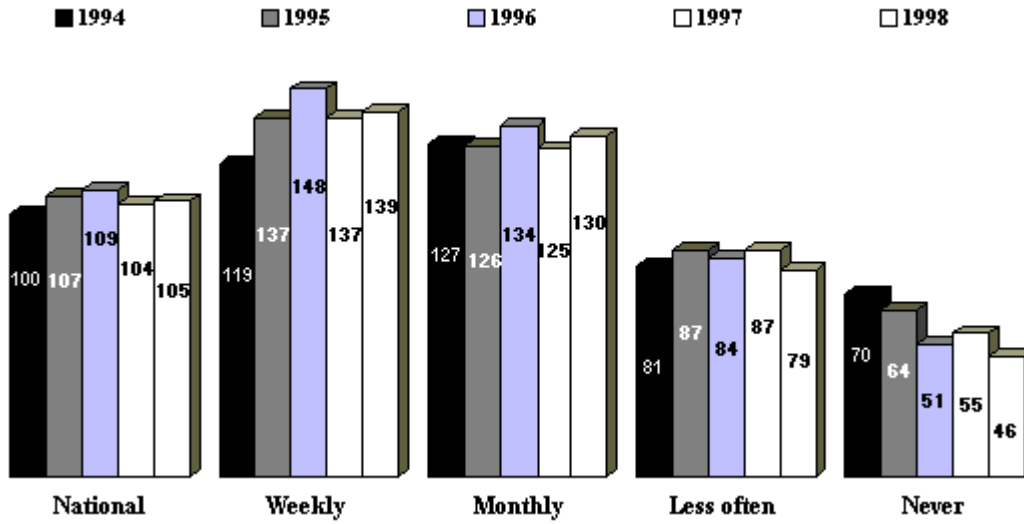


- Consistent with earlier findings, Americans who participate in recreational activities most frequently have the highest overall RQI scores. Those who participate in outdoor recreation activities on at least a weekly basis have the highest RQI at 139, a 2-point increase. They are followed by those who participate monthly (130, up 5 points). Meanwhile those who participate less often (79), and those who never participate in outdoor recreation (46), saw their RQI's decline 8 and 9 points respectively.

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## RQI: Related to Participation

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- With only two exceptions - downhill skiing (at 150, down 2 points) and swimming (130, down 1 point) - the other eighteen activities saw increases in RQI scores. In fact six of these activities experienced an increase of 10 or more points: canoeing/kayaking (up 21); wilderness camping (up 16); off-road/mountain bicycling (up 18); hiking (up 13); motorboating (up 21); and motorcycle/off-road vehicle/snowmobiling (up 21).

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## 1998 RQI Varies by Type of Activity

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|  | 1998 RQI And Components |                   |                     | 1997 RQI           |             |
|--|-------------------------|-------------------|---------------------|--------------------|-------------|
|  | Overall RQI             | Opportunity score | Participation score | Satisfaction score | Overall RQI |
| Canoeing/kayaking                        | 172                     | 141               | 214                 | 161                | 151         |
| Wilderness camping                       | 158                     | 134               | 206                 | 133                | 142         |
| Bicycling (off-road/<br>mountain biking) | 156                     | 126               | 212                 | 130                | 138         |
| Hiking                                   | 152                     | 136               | 190                 | 129                | 139         |
| R.V. camping                             | 151                     | 132               | 182                 | 139                | 144         |
| Downhill skiing                          | 150                     | 128               | 191                 | 131                | 152         |
| Motorboating                             | 149                     | 128               | 186                 | 132                | 128         |
| Campground camping                       | 147                     | 118               | 194                 | 128                | 138         |
| Golf                                     | 146                     | 133               | 174                 | 130                | 139         |
| Wildlife viewing                         | 146                     | 126               | 177                 | 137                | 138         |
| Bicycling (on road)                      | 145                     | 137               | 172                 | 127                | 136         |
| Off-road vehicles                        | 145                     | 127               | 190                 | 118                | 124         |
| Bird watching                            | 143                     | 134               | 158                 | 137                | 136         |
| Fishing                                  | 135                     | 116               | 164                 | 123                | 129         |
| Hunting                                  | 134                     | 113               | 178                 | 112                | 128         |
| Horseback riding                         | 133                     | 108               | 185                 | 106                | 132         |
| Swimming                                 | 130                     | 118               | 154                 | 118                | 131         |
| Pleasure driving                         | 129                     | 119               | 151                 | 115                | 122         |
| Walking                                  | 121                     | 116               | 133                 | 114                | 120         |

*Note: The overall "RQI" represents an average of scores for opportunity, participation, and satisfaction with outdoor recreation in general. These sub-scores are derived by indexing key questions against the benchmark year of 1994, which is set at 100. For example the overall score of 172 for canoeing/kayaking is an average of the respective opportunity (141), participation (214), and satisfaction (161) scores.*

## SECTION II: OPPORTUNITIES FOR PARTICIPATION IN OUTDOOR RECREATION

### Availability of local recreation areas

To get a sense of the state of outdoor recreation in America today, it is first important to understand how Americans perceive the outdoor resources that are available to them. Are there sufficient public sites which provide opportunities for taking part in both local, everyday recreation, and outdoor recreation vacations? As seen in previous studies, participation in outdoor recreation is inextricably linked with the availability of outdoor recreation sites.

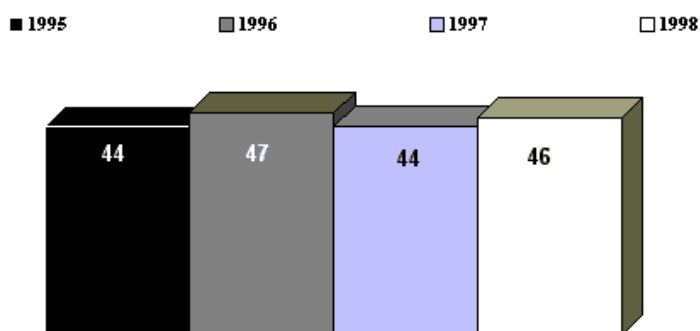
In 1998, Americans reported satisfaction levels with the availability of their local outdoor recreation opportunities slightly improved to that recorded one year ago. Forty-six percent of Americans rate the availability of outdoor recreation areas in their communities as either "excellent" or "good", a 2-point increase over 1997.

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### Opportunity For Outdoor Recreation

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*% describing availability of local recreation as "excellent" or "very good"*



### Local parks & recreation areas

- In general those with higher income and education levels are more likely to feel the availability of local outdoor recreation sites is "excellent" or "very good" compared to those at lower income and education levels. Sixty-two percent (+7 points) of those with incomes over \$75,000 and 56% (+4 points) of college graduates give the availability of local outdoor recreation facilities a rating of "excellent" or "very good." This compares to 31% (+4 points) of those with incomes under \$15,000 and 35% (no change) of individuals with no high school diploma rating the availability of local outdoor recreation sites as "excellent" or "very good."

- Only 30% of African-Americans (down 9 points) rate the availability of local outdoor recreation sites as "excellent" or "very good." This group now has the lowest rating of any identified sub-group.
- The West region - with 56% (+10 points) rating the availability of local outdoor recreation sites as "excellent" or "very good" - replaces the Midwest as the region with the highest rating. The Midwest, which experienced an 11-point decline in its rating, is now in second place with 48% of this region's inhabitants rating the availability of outdoor recreation sites as "excellent" or "very good." The Northeast region saw an 11-point increase to a 43% in the percentage rating availability as "excellent" or "very good," moving it into the third position. The South, virtually unchanged with a 40% rating of "excellent" and "very good," generates the lowest rating among the four regions.

## Availability of outdoor recreation vacation areas

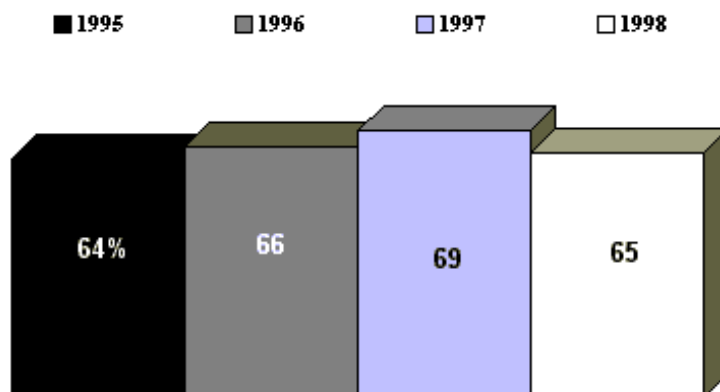
While Americans have a slightly more positive perception of their local outdoor recreation opportunities, perceptions about the availability of outdoor recreation vacation sites demonstrate a decline of 4 points over the last year. Approximately two-thirds (65%) of those who have taken an outdoor recreation vacation in the last three years report that they had either an "excellent" or "good" choice of vacation site parks and recreation areas available to them and their family. Despite this decline, Americans rate the availability of outdoor recreation areas while on vacation as being "excellent" or "very good" - almost 20 points higher than the availability of local recreation sites (65% vs. 46%). This underscores the valuable legacy of America's federal lands - roughly one in every three surface acres of the nation.

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## Availability Of Outdoor Recreation Vacation Areas

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*% describing choice of parks and recreation areas available to them on their last outdoor recreation vacation as "excellent" or "very good"*



## **Vacation recreation areas**

The most affluent Americans, those with household incomes of \$75,000 or higher, are the most likely (78%) to feel that the selection of parks and recreation vacation sites available to them was either "excellent" or "good." A smaller proportion of vacationers with annual household incomes of \$15,000 or less feel the same way (56%). African-Americans are the least likely to feel that the selection of destination parks and recreation areas available to them are "excellent" or "very good" with only 52% offering this rating.

- Several groups experienced sizeable declines in their rating of the selection of parks and recreation areas available to them on vacation as "excellent" or "very good." Specifically, those residing in rural counties (59%, down 10 points), parents with children 0-7 (58%, down 11 points), parents with children 8-17 (58%, down 13 points), and those participating in downhill skiing (70%, down 16 points), all showed lower ratings than a year ago.
- Northeasterners moved to first place among regional populations with regard to the availability of outdoor recreation areas while on vacation, despite a 3-point decline to 69% in its "excellent" and "very good" rating. The Midwest, which suffered a 9-point decline in their "excellent" and "very good" ratings to 67% came in tied with the West, which also generated a 67% rating. The South, with 56% rating the selection of parks and recreation areas available on vacation as "excellent" or "very good," received the lowest regional rating.

## **SECTION III: AMERICANS' PARTICIPATION IN OUTDOOR RECREATION**

### **Participation component of RQI stabilizes overall 1998 index**

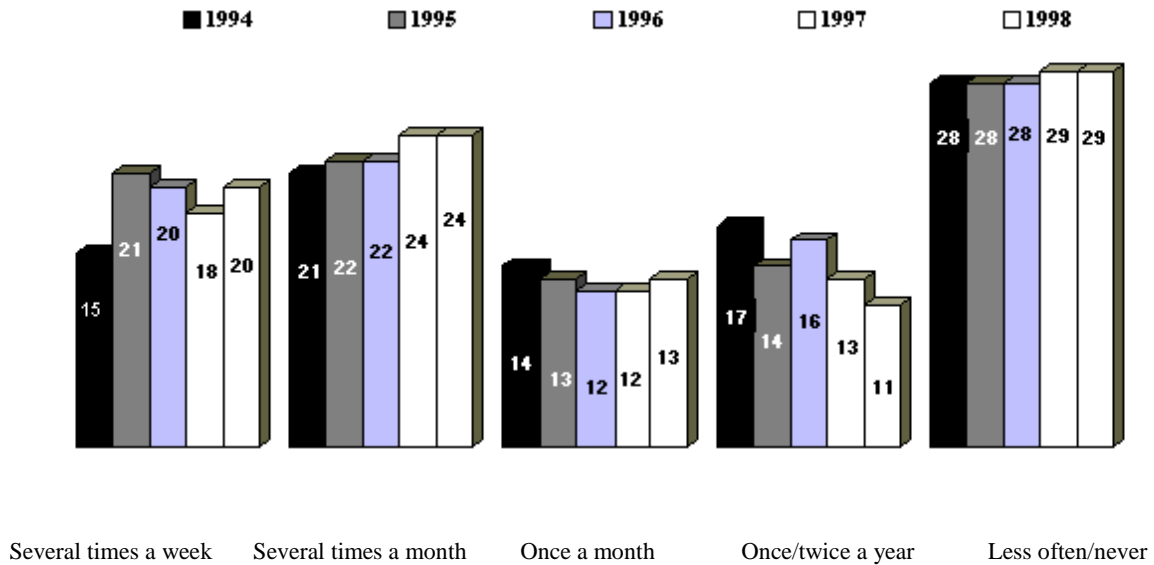
The participation component of the RQI, which was at 94 in 1997, increased 11 points to 105 for 1998. This surge reflected positive change in three measures which make up the components of the RQI index. More Americans believe that they will participate in more outdoor recreation in the coming year (26%, up 3 points), and more Americans (31%, up 5 points) actually took outdoor recreation vacations. Additionally, more Americans actually are engaging in monthly outdoor recreation at least monthly: 57%, up three points since 1997.

Three of the four regions of the country saw their participation RQI increase, although some more than others. The Midwest, which continues to lead the other regions in participation, experienced the greatest increase in its participation RQI: plus 24 points to 138. The West saw its participation RQI increase 18 points from 97 in 1997 to 115 in 1998, establishing its status as the region with the second highest participation score. The South, with a participation RQI of 90 (+9 points), moved into third position. Only the Northeast experienced a drop in its participation RQI (down 3 points to 84), which was enough to move it into last place among the regions.

### **Frequency of participation**

Almost 6 in 10 Americans (57%) participate in outdoor recreation at least monthly - enjoying activities which involve the use and enjoyment of natural resources. This is the highest percentage recorded during the five years of surveys. The number of those who participate less often than once per year has remained constant since 1994 at approximately 29%.

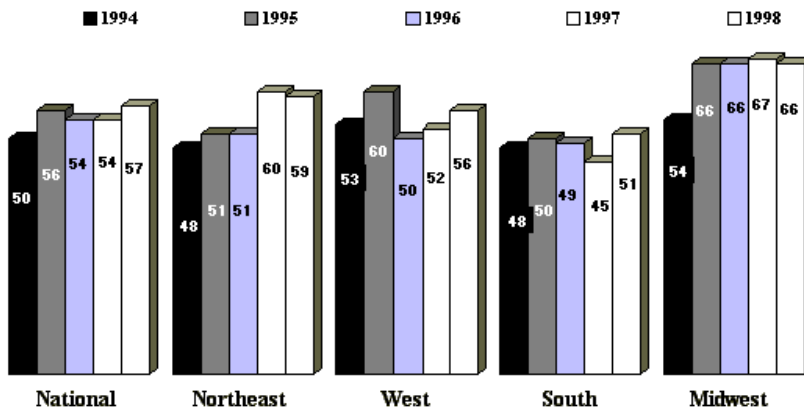
## How Often Americans Participate In Outdoor Recreation



As seen in previous years, there are large regional differences in participation. Those from the Midwest are the most likely (66%, -1 point) to take part in outdoor recreation activities at least monthly, followed by Northeasterners (59%, -1 point). Although showing increased levels of participation in these recreational activities, those from the West (56%, +4 points) and the South (51%, +6 points) are less frequently involved than the other two regions in outdoor recreational activities on a monthly basis.

## Midwesterners Remain Most Active Recreationists

*% participating at least monthly*



This year's research, as well as the previous four studies, have shown that there is a strong, positive correlation between income and participation in outdoor recreation. Three in four Americans with annual incomes of at least \$50,000 (74%) report taking part in an outdoor recreation activity at least once a month. Fifty-seven percent of those with annual household incomes between \$30,000 and \$50,000 report at least monthly participation in outdoor recreation, while only 48% (+3 points) of those earning between \$15,000 and \$30,000 report the same level of participation. The participation level of those with incomes of less than \$15,000 has increased dramatically in the last year (+15 points) to 52%.

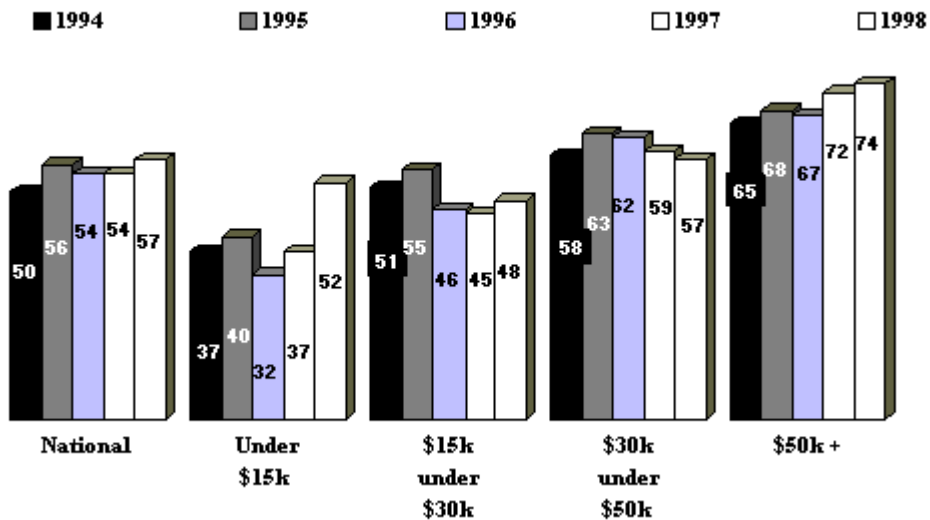
While the number of African-Americans who participate at least monthly in outdoor recreation has increased by 2 points to 38%, this group still trails other Americans in outdoor recreation participation. This is not unexpected given that African-Americans perceive the availability of outdoor recreation areas lower than any other group of Americans.

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### Affluent Are Most Active Recreationists

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*% participating in outdoor recreation at least monthly*



## **Increases in walking and driving keep the activities on the top of the participation list**

As the overall participation RQI increased from 94 in 1997 to 105 this year, reported participation in several popular outdoor recreational activities grew substantially during 1998. In fact, five of the ten most popular activities had significant increases of 3 points or more.

Similar to 1997, Americans were most likely to say that they have participated in walking for fitness/recreation (47%, up 5 points from a year ago). Driving for pleasure (39%, up 5 points) again followed as the second most popular activity. Swimming, at 33%, (up 2 points) retained its third position, while picnicking (30%, up 4) and fishing (22%, up 2 points) round out the top five activities as they did last year. The next group of the five most popular outdoor recreation activities is essentially unchanged from year ago. Bicycling on paved roads (19%, unchanged) retains its sixth position while visiting cultural sites, which grew 4 points to 18%, moves up one position to seventh place. Rounding out the top ten outdoor recreation activities are hiking (17%, up 2 points) followed by wildlife viewing at 16% also up 2 points, and running/jogging which moves back into the top ten (16%, +4 points).

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## Outdoor Recreation Participation During Past Year

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(% of American adults)

|                                      | 1994 | 1995 | 1996 | 1997 | 1998 | Pt.<br>change |
|--------------------------------------|------|------|------|------|------|---------------|
|                                      | %    | %    | %    | %    | %    |               |
| Walking for fitness/recreation       | NA   | 45   | 39   | 42   | 47   | +5            |
| Driving for pleasure                 | 40   | 36   | 33   | 34   | 39   | +5            |
| Swimming                             | 35   | 31   | 28   | 31   | 33   | +2            |
| Picnicking                           | 33   | 29   | 24   | 26   | 30   | +4            |
| Fishing                              | 26   | 24   | 22   | 20   | 22   | +2            |
| Bicycling                            | 21   | 20   | 16   | 19   | 19   | -             |
| Visiting cultural sites              | NA   | NA   | 12   | 14   | 18   | +4            |
| Hiking                               | 18   | 18   | 12   | 15   | 17   | +2            |
| Wildlife viewing                     | 18   | 15   | 10   | 14   | 16   | +2            |
| Running/jogging                      | 19   | 16   | 13   | 12   | 16   | +4            |
| Outdoor photography                  | 15   | 15   | 10   | 13   | 15   | +2            |
| Campground camping                   | 16   | 16   | 12   | 12   | 15   | +3            |
| Golf                                 | 11   | 12   | 11   | 11   | 12   | +1            |
| Bird watching                        | 14   | 11   | 8    | 11   | 10   | -1            |
| Back packing                         | 13   | 12   | 8    | 7    | 10   | +3            |
| Motor boating                        | 10   | 9    | 5    | 8    | 9    | +1            |
| RV camping                           | 8    | 8    | 6    | 7    | 7    | -             |
| Hunting                              | 8    | 7    | 7    | 5    | 7    | +2            |
| Off road vehicle                     | 5    | 5    | 5    | 5    | 7    | +2            |
| In-line skating                      | NA   | 4    | 4    | 5    | 6    | +1            |
| Tennis                               | 9    | 9    | 7    | 8    | 5    | -3            |
| Downhill skiing                      | 6    | 6    | 5    | 5    | 5    | -             |
| Canoeing/kayaking                    | 6    | 5    | 4    | 5    | 5    | -             |
| Target shooting                      | 8    | 6    | 5    | 4    | 5    | +1            |
| Personal water craft (e.g. jet skis) | NA   | NA   | NA   | 3    | 5    | +2            |
| Motorcycling                         | 7    | 5    | 6    | 4    | 4    | -             |
| Horseback riding                     | 6    | 5    | 5    | 4    | 4    | -             |
| Mountain biking                      | 5    | 5    | 4    | 4    | 4    | -             |
| Water-skiing                         | 6    | 6    | 3    | 4    | 4    | -             |
| Rock climbing                        | 4    | 4    | 3    | 3    | 4    | +1            |
| Sailing                              | 4    | 3    | 3    | 3    | 2    | -1            |
| Snorkeling                           | 4    | 3    | 3    | 3    | 3    | -             |
| Cross-country skiing                 | 2    | 3    | 2    | 2    | 2    | -             |
| Snowmobiling                         | 2    | 3    | 2    | 1    | 2    | +1            |
| Rowing                               | 3    | 2    | 1    | 2    | 1    | -1            |
| Snowboarding                         | NA   | NA   | NA   | NA   | 1    | -             |

## **Dividing our time: The number of outdoor recreation activities enjoyed by the average American**

The mild resurgence experienced in 1997 in the number of different outdoor activities which the typical American enjoyed continues quite strongly in 1998. For 1998 the number of outdoor activities in which the average American participated increased to 4.1 from 3.7 in 1997.

Participation levels for 31 of the 36 outdoor recreation activities either increased or remained the same over the last year. Not only is the participation resurgence seen last year continuing in 1998, but even more activities than in 1997 are experiencing increased levels of participation. Despite all of the demands for our time, these results suggest that Americans are finding the time to pursue outdoor recreation activities.

As seen in prior years, participants in certain types of outdoor recreation activities are more likely to engage in a wide variety of recreation pursuits. Those most likely to be "cross-recreators" are off-road bicyclists (who have participated in an average of 13.3 of the 36 activities asked about), canoe/kayakers (12.6), wilderness campers (12.1), and skiers (11.8). Those who participate in the two most popular outdoor recreation activities of pleasure driving (7.1) and walking (5.9) are markedly less likely to take part in a wide variety of activities.

As seen in prior studies, African-Americans take part in far fewer outdoor recreation activities compared to the overall public. African-Americans participated in an average of 1.8 of the 36 activities asked about, or a level more than 50% below that for Americans overall (4.1) and about one-fifth of the level experienced by "Influentials," who participate in an average of 8.6 of the 36 listed activities.

## **Outdoor recreation vacations**

Almost one in three Americans (31%) took an outdoor recreation vacation in the last year, regaining all five of the points lost in 1997 and returning to the 1996 level. Seventeen percent of Americans took their last recreation vacation between one and three years ago, while it has been more than three years for approximately one-quarter (26%) of the American public.

The increase in outdoor recreation vacations experienced during the last year does not appear to be attributable to any one particular segment, but rather comes from a variety of sub-groups. Forty-eight percent of individuals in executive positions took an outdoor recreation vacation in the last year - an increase of 12 points. Among college grads the percent taking a vacation within the last year increased by 10 points to 45%. Growth also came from several unexpected sources: the percent of those earning under \$15,000 who took a vacation in the last year increased 9 points to 18%, while those 60+ saw the percent of outdoor recreation vacation increase by 8 points to 22%.

"Influentials", a small but important segment of the population long tracked by Roper Starch for its role as social activists and opinion/group leaders within society, still are the outdoor recreation vacation leaders with 55% of this group taking an outdoor recreation vacation in the last year.

On the other hand, African-Americans, at 9%, are the group least likely to take an outdoor recreation vacation.

Among the regions, the Midwest contains the most active outdoor recreation vacationers with 45% (+12 points) indicating they took such a vacation in the last year. In the West, thirty-eight percent of the respondents say they took an outdoor recreation vacation in the last 12 months - an increase of 4 points.

## Future outdoor recreation plans

Twenty-six percent of Americans believe that they will be taking part in more outdoor recreation than they have in the past year, a three-point increase from 1997. Only 4% of Americans see less outdoor recreation in their future, while over six in ten (62%) anticipate no change in their outdoor recreation habits.

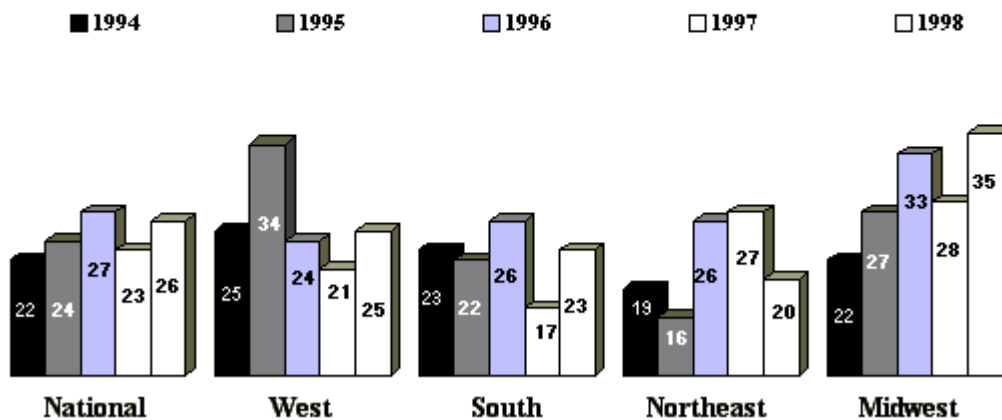
As seen in previous years, those Americans who take part in outdoor recreation activities several times each week are the most likely (38%) to say that they plan to do even more in the coming year. Affluent Americans, those with an annual household income of \$75,000 or more, and Influentials are also more likely (38% and 41% respectively) than Americans overall to plan for more outdoor recreation next year. Regionally, Americans in the Midwest (35% up 7 points) lead the nation in terms of plans to increase participation in outdoor recreation. Only the Northeast has seen a decline in this measure with only 20% (down 7 points) saying they expect to engage in more outdoor recreation next year.

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## Future Recreation Plans

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*% saying will engage in more outdoor recreation in next year*



## Parents believe that their children recreate the same amount that they did when they were children

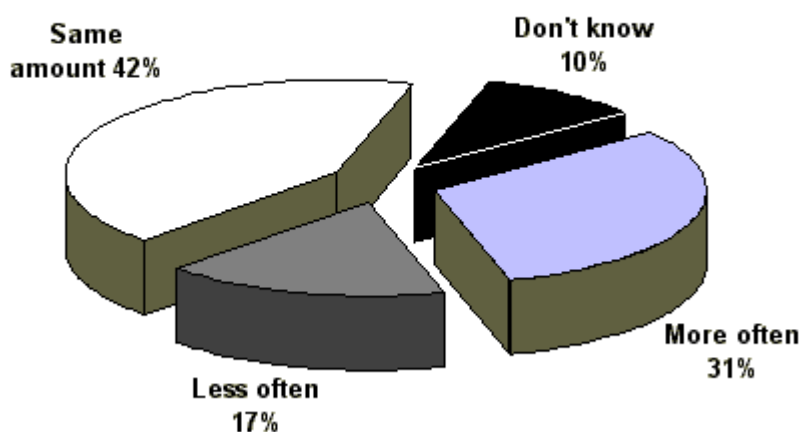
Identical to 1997 data, 42% of parents with children under the age of 18 report that their children participate in outdoor recreation about the same amount as they did at the same age.

Just under one in three (31%, down 4 points) parents report that their children are more active outdoor recreationists than they were at the same age. Seventeen percent of parents have children who participate in outdoor recreation less than they did when they were children. One in ten don't know whether or not their children are more into outdoor recreation than they were at the same age.

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### Whether Children Participate In Outdoor Recreation More Often, Less Often Or The Same Amount As Their Parents Did At The Same Age

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Affluent Americans are more likely to report that their children are more frequent outdoor recreators than they were. Half (50%, up 3 points) of parents from households with an annual income of \$75,000 or more report that their children take part in outdoor recreation more than they did at the same age. As suggested in last year's report, not only are the affluent more likely themselves to take part in outdoor recreation, but they appear to make concerted efforts to surround their children with opportunities for outdoor recreation. This group, of course, is most likely to be able to afford the expenses which are often attached to various forms of outdoor recreation. In contrast, only 23% of parents from households earning \$15,000 or less report that their children participate in outdoor recreation more than they did at the same age.

Among regional groups, parents from the Northeast (39%) are most likely to say that their children are taking part in outdoor recreation more than they did at the same age. Parents from the remaining three regions essentially feel the same about the degree to which their children participate in outdoor recreation activities. Essentially, just under one in three (32% Midwest, 29% South, 28% West) agree

that their children participate more than they did. Similarly, just over four in ten (44% Midwest, 42% South and West) say their children recreate about the same amount they did at their age.

As might be expected those who participate at least weekly in outdoor recreation are those most likely to say their children participate even more than they did in outdoor recreation (42%). This is almost double the number of those who never participate in outdoor recreation saying their children participate more in outdoor recreation than they did at the same age (23%). The finding suggests outdoor recreation is unlikely to occur in children unless their parents are involved. This is noteworthy since previous Roundtable surveys demonstrate that adult recreation participation patterns - and favorite recreational activities - are established during childhood.

### **But Americans report decline in importance of recreation as family activity**

This year, the Recreation Roundtable has updated a question about family outdoor recreation first asked for the President's Commission on Americans Outdoors in 1986, and then repeated again in 1994, asking Americans to recall the importance of recreation in the lives of their families while growing up. What we have found is that the portion of the public reporting that recreation was either very important or somewhat important as a family activity has declined significantly, as the following chart demonstrates:

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#### **Importance Of Recreation To Family When Growing Up: Change Over Time (1986-1998)**

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|                    | <b>1986</b> | <b>1994</b> | <b>1998</b> |
|--------------------|-------------|-------------|-------------|
|                    | <b>%</b>    | <b>%</b>    | <b>%</b>    |
| Very important     | 32          | 25          | 23          |
| Somewhat important | 48          | 37          | 34          |
| Not important      | 16          | 32          | 39          |
| Don't know         | 4           | 6           | 4           |

While family-based outdoor recreation seems to have declined, this study also suggests that young people are participating as much as earlier generations (see page 28). This discrepancy may be explained by the possibility that young people's participation today is more peer and individually oriented than in the past.

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## **SECTION IV: AMERICANS' SATISFACTION WITH THEIR OUTDOOR RECREATION EXPERIENCES**

### **Overall satisfaction with outdoor recreation experiences lower again**

The fact that the satisfaction RQI score dropped 7 points (from 117 to 110) and a total of 10 points since 1996 suggests there are certain findings which may well concern those in government and the outdoor recreation industry.

Even with this drop in the satisfaction RQI, Americans still feel good about the overall quality of their outdoor recreational experiences. Almost six in ten (56%, up 3 points) claim they are "extremely" or "quite" satisfied with their outdoor recreation experience.

### **Satisfaction with local and vacation recreation sites**

The continued decrease in the satisfaction RQI is not reflected in Americans' satisfaction with the key aspects of their local outdoor recreation experiences. Nearly half of all Americans (46%) rate the availability of local parks and recreation sites as excellent or very good, and another 31% rate this availability as good. For five years, we have tracked attitudes which showed lower scores in our baseline study: Fees, quality of service, and activities and instruction available at the recreation sites. Attitudes toward these facets of local experiences were virtually unchanged:

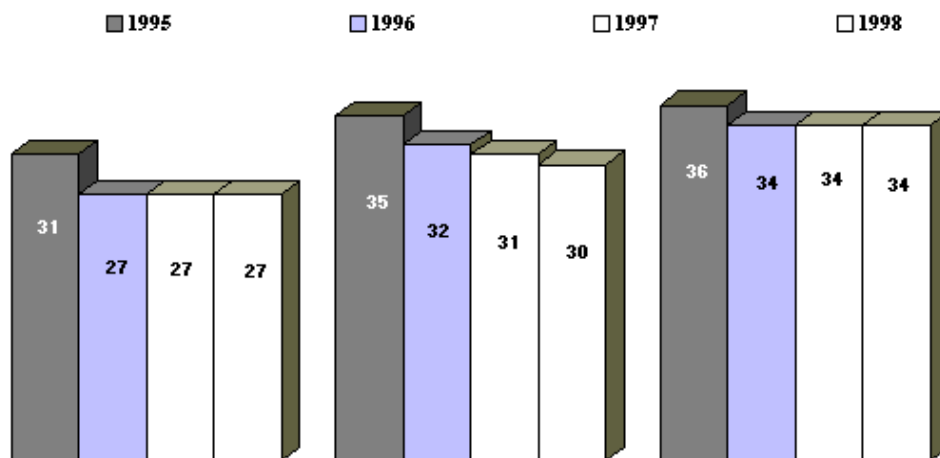
- the value received for what they have to pay in admission/fees (34% rated as excellent/very good),
- the quality of service received from park management and employees (30% excellent/very good), and
- the amount of activities and instruction available at the sites (27% excellent/very good).

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## Local Satisfaction Remains Unchanged

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*% describing local recreation as "excellent" or "very good"*



**Amount of activities/instruction available**

**Quality of service from park management/employees**

**Value received for what pay in admission/fees**

Americans generally rate their satisfaction with outdoor recreation vacations better than their local outdoor recreation experiences. Despite this, the drop in the overall satisfaction RQI seems to be related specifically to the public's decreasing satisfaction with outdoor recreation vacations. Declining numbers of Americans are describing their last outdoor recreation vacation as "excellent" or "very good" in terms of:

- the value received for what they have to pay in admission/fees (50%, down 3 points in addition to the 3 point drop the prior year),
- the quality of service received from park management and employees (47%, down 6 points), and
- the amount of activities and instruction available at the sites (47%, down 6 points).

The responsibility for these declines seems to fall primarily on middle America. The groups who are consistent in their dissatisfaction across the three areas and who account for the largest declines include:

- blue collar occupations (declines of 6, 9 and 11 points in satisfaction with value received, service from park management/employees and activities/instruction available, respectively),
- ages 30-44 (declines of 9, 9, 8 points in the three measures),
- Midwest region (declines of 9, 16 and 17 points in the three measures),
- "C" counties (declines of 22, 16 and 4 points in the three measures),

- \$30,000-\$50,000 income (declines of 10, 13, and 8 points in the three measures), and
- Parents with kids 8-17 (declines of 8, 11, and 8 points in the three measures).

Also evident across the various sub-groups is a leveling of the percent rating their satisfaction as "excellent" or "very good" compared to prior years. For example, last year as many as 30 points separated the lowest and highest rating groups, whereas in this year's report the differences between the lowest and highest ratings are about half this.

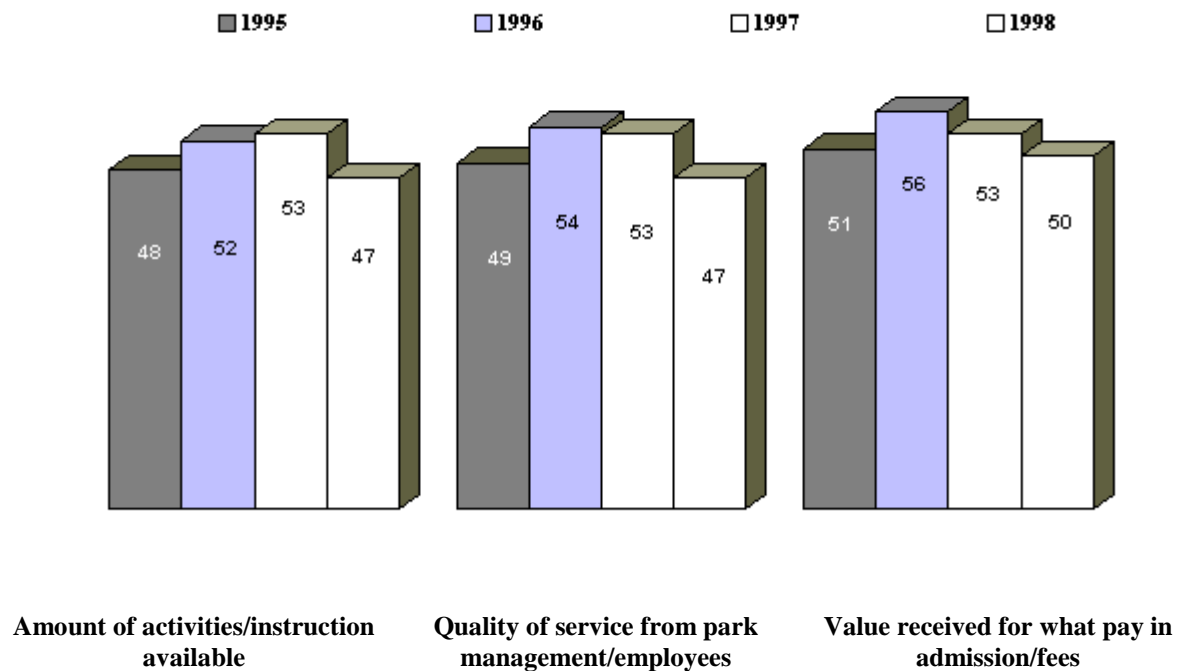
The drop in satisfaction with outdoor recreation sites occurs at a time when new and higher fees are being introduced at federal recreation sites. While this might explain in part the decline in perceived value, it should not adversely affect the quality of service received or the amount of activities. In fact, the higher fees should be boosting the resources available to federal recreation site managers to satisfy visitors.

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## Satisfaction With Vacation Recreation

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*% describing last outdoor recreation vacation as "excellent" or "very good"*



## Section V: Motivations and Benefits

### What Americans want out of their outdoor recreation experience

Americans participate in outdoor recreation for a number of different reasons, and it is vital to understand how well Americans' leisure agenda is being fulfilled. Americans were asked to rate how well their recent outdoor recreation experiences satisfied 12 different reasons for taking part in such forms of recreation. Each item was rated on a scale of "1" (not at all satisfied) to "5" (completely satisfied). Responses of either "4" or "5" were taken to represent high satisfaction with that particular recreational goal.

Americans are most likely to be satisfied that outdoor recreation is satisfying their desire for fun (71%), relaxation (65%), stress relief (64%), experiencing nature (63%), and exercise (62%). Two characteristics showed a four point increase in satisfaction for 1998: family togetherness (61%), and being with friends (55%). Meanwhile, satisfaction with the desire for excitement (54%) and children learning good values (46%) experienced 3 point increases.

As with other recreation measures, satisfaction with the "fun" aspect of their outdoor recreational experience varies among population groups. Those with annual household incomes over \$50,000 (84%), those with a college education (81%) and the "Influentials" (85%) appear to be highly satisfied with the fun aspect of their outdoor recreation experiences. However, far fewer of those with an annual household income under \$30,000 (66%), those without a high school diploma (59%), and African-Americans (52%) feel this way.

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### How Well Outdoor Recreation Fulfills Priorities

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*% satisfied with recent outdoor recreation for each reason*

|                               | 1995 | 1996 | 1997 | 1998 | Pt. change |
|-------------------------------|------|------|------|------|------------|
|                               | %    | %    | %    | %    | since 1995 |
| Fun                           | 64   | 68   | 69   | 71   | +7         |
| Relaxation                    | 62   | 64   | 65   | 65   | +3         |
| Stress relief                 | 59   | 61   | 62   | 64   | +5         |
| Experiencing nature           | 56   | 62   | 61   | 63   | +7         |
| Exercise                      | 59   | 61   | 60   | 62   | +3         |
| Family togetherness           | 55   | 55   | 57   | 61   | +6         |
| Being with friends            | 48   | 52   | 51   | 55   | +7         |
| Time to self                  | 48   | 54   | 55   | 54   | +6         |
| Excitement                    | 51   | 54   | 51   | 54   | +3         |
| Children learning good values | 43   | 40   | 43   | 46   | +3         |
| New skills                    | 38   | 39   | 38   | 36   | -2         |
| Competition                   | 27   | 30   | 27   | 26   | -1         |

## Recreation Participation Yields More Content Americans

In 1994, Recreation Roundtable research determined that people who participated frequently in recreation were happier with their jobs, their families and their lives overall. The 1998 study shows that, in general, Americans are happier with their lives. In fact, the percentage reporting complete satisfaction climbed 5 points to 34%. However, among active recreationists - the one in five Americans who recreate at least twice weekly - satisfaction with the overall quality of life rose even higher - to 45%. An additional 49% of those active recreationists reported being "fairly well" satisfied with their lives.

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### Satisfaction With Overall Quality Of Life

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|             | Frequency Of<br>Recreation (1998) |         |       | Frequency Of<br>Recreation (1994) |         |       |
|-------------|-----------------------------------|---------|-------|-----------------------------------|---------|-------|
|             | Several<br>times a<br>week        | Monthly | Total | Several<br>times a<br>week        | Monthly | Total |
|             | %                                 | %       | %     | %                                 | %       | %     |
| Completely  | 44                                | 35      | 34    | 38                                | 32      | 29    |
| Fairly well | 49                                | 56      | 53    | 52                                | 55      | 55    |
| Not too     | 6                                 | 8       | 10    | 6                                 | 10      | 12    |
| Not at all  | 0                                 | 1       | 1     | 3                                 | 2       | 3     |

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## SECTION VI: FEDERAL OUTDOOR RECREATION SITES

### Americans' familiarity with the public lands managed by various agencies

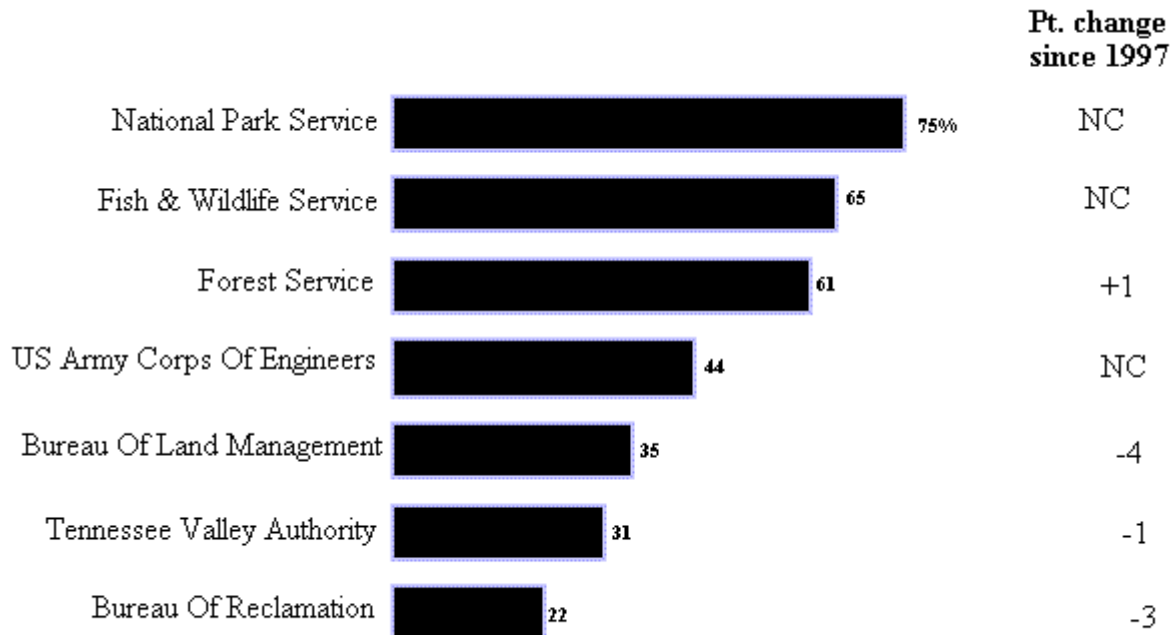
The public is most familiar with recreational opportunities available on public lands managed by the National Park Service, with three in four (75%) reporting that they are aware of such opportunities. Nearly two-thirds of Americans are familiar with the public land opportunities offered by the Fish & Wildlife Service (65%), followed by the Forest Service (61%), the U.S. Army Corps of Engineers (44%), the Bureau of Land Management (35%), the Tennessee Valley Authority (31%), and the Bureau of Reclamation (22%). The Bureau of Land Management saw its recreational opportunity awareness rating drop four percentage points in the last year, a year after it had increased six points.

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### Awareness Of Specific Recreational Opportunities Available On Public Lands By Various Agencies

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*% aware of specific recreational opportunities available on public lands managed by each agency*



In 1998 as in 1997, men are more likely than women to report being aware of recreational opportunities run by these seven federal agencies. Affluent and educated Americans are also more likely to be aware of the seven agencies than the average American. Nine of ten college graduates, midwesterners and "Influentials" know of a park site. On the other hand, just 58% of northeast U.S. residents and just 61% of African Americans report awareness. Nationally, sites under the jurisdiction of the Fish and Wildlife Service are the second-highest recognized category, but the Forest Service ranks second among westerners, college graduates and "Influentials." The Bureau of Land Management and the Bureau of Reclamation, too, show far higher recognition among westerners - not surprising, in light of the regional nature of the land and water base of these agencies.

Again, the most active recreationists - those Americans who participate in outdoor recreation at least monthly - are very familiar with the opportunities available through public lands run by various government agencies.

One in three Americans visited a federal recreation site over the past twelve months. Americans are most likely to report having personally used outdoor recreation sites managed by the National Park Service, with 24% of the public reporting that they had done so. Fish & Wildlife Service and Forest Service sites have been used by 12% and 11% of the population, respectively. The other agencies have been enjoyed by lower numbers of visitors over the last 12 months: U.S. Army Corps of Engineers (4%), Bureau of Land Management (3%), Tennessee Valley Authority (2%), and the Bureau of Reclamation (1%). Actual visitor counts by the federal agencies show substantially different usage. A logical conclusion is that many Americans believe they are visiting a park when they are in fact enjoying a site operated by another federal agency.

### Have Personally Used Public Lands Run By Agency In Past 12 Months

*% who have personally used public lands managed by each agency in the last 12 months*

|                            |     | Pt. Change since 1997 |
|----------------------------|-----|-----------------------|
| National Park Service      | 24% | +2                    |
| Fish & Wildlife Service    | 12  | +2                    |
| Forest Service             | 11  | +2                    |
| US Army Corps Of Engineers | 4   | NC                    |
| Bureau Of Land Management  | 3   | NC                    |
| Tennessee Valley Authority | 2   | NC                    |
| Bureau Of Land Management  | 1   | NC                    |

Consistent with last year's findings, those from the Midwest and West report especially heavy usage of lands managed by all seven agencies, with 44% and 39%, respectively, having used at least one of the agencies' land sites in the past 12 months. Those from the Midwest and the West are most likely to have used public lands for recreation managed by the National Park Service (32% and 30% respectively), the Fish & Wildlife Service (16% and 12% respectively), the Forest Service (14% and 18% respectively). The only significant difference in land use between the two regions occurs with the use of land under the supervision of the Bureau of Land Management which is used by 10% of Westerners, but only 2% of Midwesterners.

## **The public's willingness to pay to use or visit federal lands**

Federal funding for many of the agencies which manage outdoor recreation sites on public lands is unable to keep pace with growing visitor demands. Therefore, it is important for the government and the recreation industry to gauge how much Americans are willing to pay, if anything, in new fees when they use or visit public lands. These additional funds would be used to maintain or improve the quality of outdoor recreation facilities and services at such sites.

Those Americans who have used public lands in the past year, equal to 32% of the public (up 6 points), are willing to pay an average of \$9.20 in additional fees when they use federal lands, down from 1997 (\$11.20). At the same time, approximately one in seven (15%) Americans who have used public lands in the past 12 months are not willing to pay any extra for visiting and using public lands. The size of this group is down 5 percentage points from the 20% level seen in prior years.

As seen in last year's report, active recreationists - those who take part in outdoor recreation activities at least weekly - are willing to pay more (\$10.20) than less active recreationists. Likewise, those Americans who say that they are "extremely satisfied" with their outdoor recreational experience are willing to pay more (\$11.00) than lesser satisfied Americans.

Interestingly, almost all groups show a decline in the amount that they would be willing to pay from last year. This is particularly evident among those residing in the Northeast, down \$14.70 to \$8.10; those in blue collar occupations, down from \$12.60 to \$8.00; and those "extremely satisfied" with their last outdoor recreation vacation, down from \$14.90 to \$11.00.

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## **SECTION VII: A REPORT CARD ON FEDERAL RECREATION SITES**

The 1998 research expands significantly awareness of public attitudes regarding the quality of experiences at federally-managed outdoor recreation sites. This research offers both important baseline data for future years as well as national measurements of satisfaction which can be used as norms for local comparisons.

### **Activities of federal lands users**

Federal site visitors are outdoor activities enthusiasts. Visitors to all of the federally managed outdoor recreation sites are markedly more likely than average to have engaged in just about all of the outdoor activities asked about.

National park service visitors, while still far more active than typical Americans, are the most moderate participants in outdoor recreation activities of all the federal site visitor groups. Visitors to sites managed by the Fish & Wildlife Service and the U.S. Army Corps of Engineers are particularly apt to have fished (65% and 54% respectively vs. 23% of the public), and hunted (24%, 29% vs. 7%) in the past year. Visitors to U.S. Army Corps sites are also particularly likely to have been target shooting (37% vs. 6% of the public), driven off-road vehicles (25% vs. 6%) or rode motorcycles (15% vs. 5%) in the past year.

Forest Service and Bureau of Land Management visitors, also avid outdoor recreationists, fit a different profile. Visitors to Forest Service sites are more apt than other groups to have picnicked (57% vs. 28% of the total public), visited cultural sites (41% vs. 15%), and done outdoor photography (32% vs. 13%) in the past 12 months. Visitors to Bureau of land management sites, also fond of cultural sites (38% vs. 15%), are more apt than other groups to have gone campground camping (52% vs. 15%), skiing (25% vs. 6%), off-road vehicle driving (24% vs. 6%) and motorcycling (16% vs. 5%).

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## Activities of Federal Lands Users

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### *Participated in activity in past 12 months*

|   |    | Nat'l Park<br>Service | Fish &<br>Wildlife | Forest<br>Service | U.S. Army<br>Corps | Bureau of<br>Land<br>Management |
|---|----|-----------------------|--------------------|-------------------|--------------------|---------------------------------|
|   | %  | %                     | %                  | %                 | %                  | %                               |
| Rigorous walking                        | 52 | 69                    | 66                 | 74                | 77                 | 71                              |
| Driving for pleasure                    | 37 | 58                    | 64                 | 66                | 63                 | 67                              |
| Swimming                                | 34 | 54                    | 57                 | 58                | 57                 | 57                              |
| Picnicking                              | 28 | 48                    | 49                 | 57                | 55                 | 50                              |
| Fishing                                 | 23 | 37                    | 65                 | 43                | 54                 | 47                              |
| Bicycling                               | 19 | 34                    | 33                 | 39                | 32                 | 42                              |
| Viewing wildlife                        | 18 | 34                    | 39                 | 42                | 48                 | 45                              |
| Campground camping                      | 15 | 32                    | 39                 | 39                | 40                 | 52                              |
| Visiting cultural sites                 | 15 | 30                    | 29                 | 41                | 34                 | 38                              |
| Running/jogging                         | 14 | 22                    | 24                 | 26                | 21                 | 30                              |
| Outdoor photography                     | 13 | 25                    | 23                 | 32                | 26                 | 29                              |
| Golf                                    | 12 | 23                    | 25                 | 23                | 22                 | 29                              |
| Backpacking                             | 10 | 22                    | 25                 | 28                | 38                 | 45                              |
| Motorboating                            | 9  | 18                    | 25                 | 20                | 26                 | 22                              |
| RV camping                              | 7  | 14                    | 18                 | 17                | 26                 | 22                              |
| Hunting                                 | 7  | 14                    | 24                 | 19                | 29                 | 21                              |
| Off-road vehicle driving                | 6  | 13                    | 20                 | 18                | 25                 | 24                              |
| Skiing                                  | 6  | 13                    | 12                 | 15                | 13                 | 25                              |
| Tennis                                  | 6  | 11                    | 8                  | 11                | 8                  | 10                              |
| Target shooting                         | 6  | 12                    | 18                 | 17                | 27                 | 21                              |
| Canoeing/kayaking                       | 5  | 12                    | 15                 | 16                | 19                 | 10                              |
| Personal water craft<br>(e.g. jet skis) | 5  | 11                    | 13                 | 14                | 17                 | 14                              |
| Motorcycling                            | 5  | 10                    | 13                 | 10                | 15                 | 16                              |
| In-line skating                         | 5  | 9                     | 8                  | 9                 | 8                  | 9                               |
| Horseback riding                        | 4  | 7                     | 8                  | 8                 | 6                  | 10                              |
| Rock-climbing                           | 3  | 7                     | 8                  | 9                 | 8                  | 11                              |
| Snowmobiling                            | 3  | 5                     | 6                  | 5                 | 3                  | 8                               |
| Sailing                                 | 2  | 5                     | 5                  | 5                 | 4                  | 6                               |
| Rowing                                  | 2  | 4                     | 5                  | 4                 | 5                  | 5                               |
| Snowboarding                            | 1  | 4                     | 2                  | 3                 | 3                  | 4                               |

## **Satisfaction with visits to federal outdoor recreation sites**

Of those who took an outdoor-recreation related trip over the past two years (some 41% of all adults), 65% have visited a federally-managed recreation site within the past year -about twice the national average. When asked about different aspects of the quality of their experiences at these sites, visitors were quite pleased overall. For example, 97% said the choices they had of outdoor recreation at these sites was either "excellent", "very good" or "good." What's more, substantial majorities of visitors to specific federal sites said they were "extremely" or "quite" satisfied with the overall quality of their outdoor recreation experiences. Specifically, 87% of national park service visitors expressed this level of satisfaction with their last outdoor recreation experience, while 83% of Fish & Wildlife service visitors and 82% of Forest Service visitors said the same.

Visitors are also generally pleased with many specific aspects of their visits to federal sites. Overall cleanliness and quality tops the list of attributes that visitors were most satisfied with (69% said it was "excellent" or "good"), followed by safety and security (68%), value received for cost of travels (64%), activities and instruction (64%), and quality of service (62%), and value received for fees paid (59%).

## **Recreation fees for specific types of services and opportunities**

For the first time, the 1998 Roundtable survey asked Americans to express their thoughts on the appropriateness of fees for specific areas and services. We did see a clear difference in the kinds of sites for which fees were seen as appropriate as well as differing views among participants in various recreation activities. We asked respondents to indicate preferences for fees, use of general revenues or a combination of fees and general revenues for four types of opportunities: 1) general access to a recreation site, 2) use of a visitor center, 3) parking at a trailhead, 4) use of picnic areas.

Of these sites, trailhead parking fees proved most acceptable, with one in three expressing support for cost-recovery through fees and another one in three supporting use of a combination of fees and general revenues. Fees for visitor centers drew the least support-fewer than one in five (19%) supported fee funding, while 36% favored funding these facilities entirely with general revenues.

There is an interesting difference in the views about funding recreation opportunities held by those who actually visited a federal recreation site during the past twelve months: while 10% of all Americans respond that they are unsure about who should pay for specific recreation opportunities, the unsure response nearly disappears among those who have visited a federal site. But those actually visiting sites are not more supportive of fee-funding; in fact, they tend to favor increased use of general tax revenues.

Those who hunted within the past year were among the least supportive of fees, expressing support below that of the general public for all four types of recreation opportunities. Canoeists and birdwatchers also reported support for fees that ranked substantially below the general public three of the four opportunities.

Regionally, westerners are the strongest supporters of fees charged for trailheads (44% vs. 33% nationally), as well as of fees charged for the use of picnic areas (33% vs. 23% nationally). Midwesterners, on the other hand, show the lowest level of support for reliance on fees for all four types of recreation opportunities. For example, only 16% of Midwesterners supported reliance on fees for picnic areas, as compared to 23% of the total public and 33% of Westerners.

## SECTION VIII: HOW THE PUBLIC FEELS ABOUT SUPPORT OF PUBLIC LANDS BY BUSINESS CORPORATIONS

Because of the large funding needs of federal, state and local recreation facilities, it has become necessary to look to other sources of funding beyond general tax revenues and entrance and recreation fees.

One additional potential source of funding is both on a local and national level. A donation by the retailer Target is helping to fund renovation of the Washington monument while thousands of businesses have become part of "Adopt-a-Highway" programs. New York State recently selected Coca Cola as the official soft drink of its state park system, a move which will provide the state with millions of dollars of new funding.

In an effort to gauge the public attitudes toward business support of recreation sites and reactions, this year's survey for the first time included a series of questions directly related to this issue. Specifically, respondents were asked the degree to which they agreed with or opposed each of the following five statements:

- *I like the idea of businesses providing financial support to our parks and recreation areas.*
- *Companies should be encouraged to adopt trails and visitor centers, just as they are encouraged to adopt stretches of roadways to reduce litter.*
- *I think it would be a good idea to experiment with corporate underwriting of parks and recreation programs.*
- *I fear that allowing corporations to become more active in our parks and recreation areas will result in too much commercialization of these sites.*
- *I'd rather pay higher recreation and entrance fees than have companies underwrite some park and recreation area costs.*

### Feelings Toward Corporate Involvement With Public Facilities

| Statement  | Agree | Neutral | Oppose |
|--|-------|---------|--------|
| I like the idea of businesses providing financial support to our parks and recreation areas  | 70%   | 16%     | 9%     |
| Companies should be encouraged to adopt trails and visitor centers, just as they are encouraged to adopt stretches of roadways to reduce litter    | 67%   | 20%     | 7%     |
| I think it would be a good idea to experiment with corporate underwriting of parks and recreation programs   | 57%   | 25%     | 11%    |
| I fear that allowing corporations to become more active in our parks and recreation areas will result in too much commercialization of these sites | 36%   | 31%     | 24%    |
| I'd rather pay higher recreation and entrance fees than have companies underwrite some park and recreation area costs                              | 24%   | 28%     | 39%    |

The public is generally agreeable to having corporations provide financial support for parks and recreation areas and supports adoption of trails and visitor centers. Approximately 7 out of 10 (71%) agree with the idea of corporate financial support, while 67% agree with the idea of businesses adopting public facilities. A majority (57%) believes that it would be appropriate for corporations to underwrite parks and recreation programs. Although somewhat concerned that corporate involvement might result in too much commercialization, the public seems to be unsure of whether or not this will occur: 36% agree, 31% are neutral and 24% disagree with the statement.

There is no doubt that Americans would rather have industry foot the bill than be forced to pay higher fees on their own. Only about one-quarter (24%) would rather pay additional entrance and recreation fees than have companies underwrite some of the costs.

- More affluent Americans are more likely to agree with all of the statements than their less affluent counterparts. Among those with incomes in excess of \$75,000, 76% agree that business should provide financial support, 74% agree that business should be encouraged to adopt trails and visitor centers, and 69% agree that it would be a good idea to experiment with corporate underwriting of park and recreation costs.
- Users of public lands within the last 12 months are also more likely to agree with all of the statements. Those who have used Fish and Wildlife Services facilities are the most positive in their response. Eighty two percent agree that businesses should provide financial support, 83% say that businesses should be encouraged to adopt trails and visitor centers, and 70% are in agreement with experimenting with corporate underwriting of park and recreation costs.
- On the other hand, African-Americans are the group least likely to agree with all of the proposed ideas. Sixty percent agree with financial support by corporations, 56% agree that business should be encouraged to adopt facilities, and only 50% agree that it is a good idea to experiment with corporate underwriting of parks and recreation costs.

These results suggest that it would be appropriate for public parks and recreation areas to approach businesses with partnership programs that offer corporations an incentive for providing funding for the maintenance and expansion of public parks and recreation areas.

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## **TECHNICAL APPENDIX**

### **Methodology**

The survey was conducted among two nationwide cross-sections totaling 3,983 men and women 18 years of age and over. Interviews were conducted by Roper Starch Worldwide in person, in respondents' homes.

Interviewing was conducted between March 7 and March 21, 1998 and between April 4 and April 18, 1998. Some data are based on the two waves and some are based on one wave or the other.

### **Sampling method**

The persons interviewed in this study comprise a representative sample of the population of the continental United States, ages 18 and older - exclusive of institutionalized segments of the population (military bases, nursing homes, prisons, etc.).

A multi-stage probability sample of interviewing locations is employed in the research. The probabilities of selection at each stage are based on the latest U.S. Census population data, and detailed Census maps are used to identify and locate the selected areas.

At the first stage, 100 counties are selected with probabilities proportionate to population, after all the counties in the 48 contiguous states and the District of Columbia are ordered by population size within 18 strata. The strata are constructed by classifying counties as metropolitan or non-metropolitan with each of the 9 Census Geographic Divisions.

### **How the "Recreation Quality Index" was Calculated**

The 1995 study was the first to include a "Recreation Quality Index" which has been designed to summarize the overall trend for America's outdoor recreation life. In 1998, the overall RQI index stands at 105, up one point from a year ago and five points above the benchmark score of 100 in 1994.

The index is useful not only for comparing the total public result over time, but also for comparing the quality of the outdoor experiences of various subgroups. For example, Americans with incomes in excess of \$75,000 have an overall RQI of 138 in the 1998 survey, compared to the national average of 105.

The overall RQI score actually is an average of three sub-indices:

1. Opportunity for outdoor recreation
2. Participation in outdoor recreation
3. Satisfaction with recent outdoor recreation experiences

In turn, these three sub-indices were derived from the responses to 13 specific question items contained in this survey. Which question items were used-and how the initial responses were calculated-is presented below.

### ***OPPORTUNITY ITEMS***

Question item: Calculation of response:

1. Availability of local parks (Q73a) (% excellent + % good)
2. Availability of vacation parks (Q75a) (% excellent + % good)
3. Quality of local recreation opportunities (Q71) (% getting better)

### ***PARTICIPATION ITEMS***

Question item: Calculation of response:

4. How often recreate outdoors (Q69) (% Participate once a month or more)
5. Next year's recreation plans (Q72) (% more often)
  1. Recreation vacation (Q74) (% went in past year)
7. Chance of recreation vacation (Q76) (% higher chance)

### ***SATISFACTION ITEMS***

Question item: Calculation of response:

8. Value from local recreation (Q73b) (% excellent + % good)
9. Amount of local recreation activities (Q73c) (% excellent + % good)
10. Local rec. service quality (Q73d) (% excellent + % good)
11. Value from vacation rec. (Q75d) (% excellent + % good)

12. Amount of vacation recreation activities  
(Q75b) (% excellent +% good)

1. Vacation rec. service quality (Q75c) (% excellent + % good)

For each category (opportunity, participation, and satisfaction), the percentages indicated above were added together for both the 1994 benchmark and 1998 surveys, resulting in two raw index scores for each of three component areas. Then, the 1994 and 1998 raw scores were adjusted such that the 1994 scores would be made equal to the corresponding sub-index score in 1994 (99 for "opportunity," 103 for "participation," and 119 for "satisfaction"). Hence, the results in 1998 build upon the similarly derived index scores for 1994. The formulas used for the three sub-indices were:

**1996 opportunity index =  $99 / (\text{1994 raw score}) \times \text{1998 raw score}$**

**1996 participation index =  $103 / (\text{1994 raw score}) \times \text{1998 raw score}$**

**1996 satisfaction index =  $119 / (\text{1994 raw score}) \times \text{1998 raw score}$**

The three resulting sub-indices were then added together and the total was divided by 3 for the overall Recreation Quality Index for 1998.