



American Recreation Coalition

*Dedicated to the protection and enhancement of everyone's right
to health and happiness through recreation.*

OUTDOOR RECREATION OUTLOOK 2017

**Prepared for ttra
2016 Marketing Outlook Forum**

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OVERVIEW:

Outdoor recreation is a driving force in the American economy, generating more than \$650 billion in annual spending and supporting tens of millions of jobs across the country. America's great outdoors and the opportunities for healthy, active fun it provides loom large in the public eye after the Centennial of the National Park Service. Federal land and water management agencies – which collectively oversee nearly one-third of the surface of this country – have responded with a new focus on outreach and promotion. Now, as the country faces the transition to a new President and likely significant Congressional changes, the outdoor recreation community has an extraordinary opportunity to capitalize on its economic importance. Public agencies are encouraging visitation, including a major outreach to families with children through [“Every Kid in a Park.”](#) This important program, now in its second year, is focused on getting all four million 4th graders and their families across the country to a state, national or local park, and then encouraging return visits throughout the year with a free entrance pass for federal sites. And Congress is getting involved, with legislation aimed at expanding concessions in national parks, creating an Outdoor Recreation Satellite Account, and more.

Efforts to boost domestic visitation are complemented by greater federal enthusiasm for promoting America's great outdoors as a destination to international visitors. Increased participation at promotional events like [IPW](#) – to be held in Washington, D.C. in 2017 – and tools such as 100 easy, pre-planned trip itineraries show that federal agencies and their partners are ready to do their part in growing international tourism to the United States to the President's desired goal of 100 million annual visitors.

As part of this renewed focus on outreach and promotion both domestically and internationally, public and private members of the outdoor recreation community are placing greater importance on the development of new outdoor apps to reach out to a younger, more diverse, urban and technologically connected population. Apps that help people plan and track hikes, book campsites while on the road, buy fishing licenses while on the water, post pictures while on a ski mountain and more are making it easier than ever for people to find healthy, active fun outdoors on their public lands and waters.

NATIONAL PARKS:

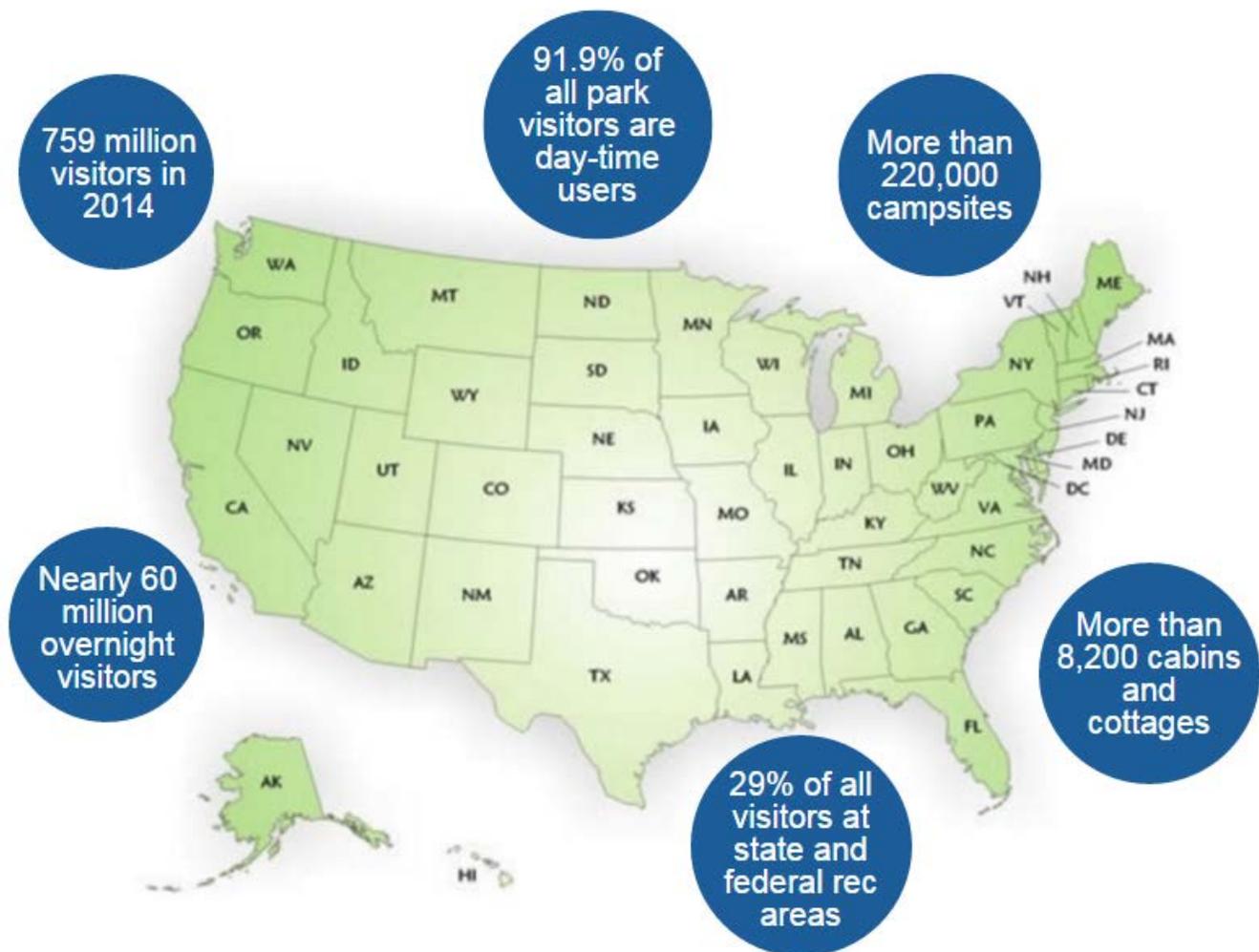
The National Park Service (NPS) has an extraordinary opportunity to make fundamental and badly needed changes to how it funds maintenance and visitor services. NPS needs to adopt innovative financial practices that could ensure national parks remain relevant, accessible and sustainable as they enter their second century. A new Presidential Administration and a new Congress are about to take shape, making this a perfect time to look at these challenges with an optimistic spirit and an open mind.

The National Park System contains 400+ units across the country, ranging from world-renowned treasures to small, urban historic sites. Overall, year-to-date visitation to NPS units is up 3.9% over 2015, an increase of 9.7 million visits. Yellowstone National Park has beaten September's record visitation for the second year with more than 701,000 visits, up from 680,000 last year. Many other units, including Bryce Canyon National Park, Glacier National

Park and Zion National Park, have also seen significant attendance increases. This increase in visitation is also being felt at fee-collecting units, with visitation up 3.54% for the year to date, an increase of more than six million visits.

Many of the 300+ million visits to national parks rely upon services of national park concessioners, including lodging, food, retail, transportation and guide services. Concessioners employ over 25,000 during peak season and have long been leaders in park promotion efforts. Concessioners are working with federal agencies, which collectively manage one-third of the nation's surface, state tourism agencies and gateway communities. Most importantly, concessioners are committed both to meeting America's needs for healthier lifestyles, for better and lifelong educational opportunities, and for strong local and regional economies that sustain and protect our parks, and to connecting all Americans to our parks across differences in regions, age, income and ethnicity.

STATE PARKS:



America's state parks are one of the fastest growing venues for outdoor recreation on public lands and waters. More than 10,000 areas, including more than 8,600 trails over 43,000 miles in total length, provide wonderful outdoor recreation experiences and unique education opportunities. Eighteen million acres provide for great diversity and were enjoyed by nearly

760 million visitors in 2015.

More and more, the importance of state parks and their growing attendance is being recognized by state legislatures, with total capital expenditures for state park operations increasing by \$159 million (25.3%). This is a result of increased funds and bonds thanks to the recovering economy.

According to the Annual Information Exchange (AIX) Report, operating expenditures for state parks added up to \$2.46 billion. Park revenue covered 42.5% of that amount, while state general funds contributed 31.2%.

America's state parks provide diverse opportunities for outdoor recreation that enhance physical health, emotional well-being, and family and social bonding important to our quality of life. Visits to state parks build knowledge and appreciation of nature that create awareness for the need for environmental stewardship. State parks are an essential component of the nation's outdoor recreation resources and a healthy, active lifestyle. State park visitation continues at record levels, and is expected to keep rising in the future as more people take advantage of healthy, active outdoor fun close to home.

RECREATION.GOV:



A dozen federal agencies participate in Recreation.gov, a recreation trip-planning, reservation and information-sharing platform for the nation's federal lands and waters, including campgrounds, river and backpacking permits, and tour opportunities. With the steady growth Recreation.gov has experienced, the site anticipates visitation to continue to climb due to the increase in inventory, support of high-profile events and locations, and targeted marketing strategies. Planning is underway for a second-generation website which will greatly expand its ability to ease outdoor trip planning – offering entry passes and license sales and linking campsites to more recreation opportunity information.

VEHICLE SALES AND RENTALS:

RV Economic Impact



The RV industry's shipments are expected to continue rising through 2017, according to a new Recreation Vehicle Industry Association (RVIA) forecast. Since the end of the "Great Recession," when the market bottomed in 2009, the RV industry has come roaring back with RV shipments up more than 125%. RV shipments are expected to total 405,300 in 2016, an 8.3% gain over 2015, and eclipse the 2006 peak as the best year since 1977. RV shipments are forecast to increase to 411,000 in 2017, which represents the eighth consecutive year of gains, the longest ever recorded. The largest unit gains in 2016 and 2017 are expected in conventional travel trailers.

Shipments of towable RVs are expected to reach 345,500 units in 2016 and 352,300 units in 2017, representing 87% of all shipments for those two years. Meanwhile, motorhome shipments are projected to represent 13% of all shipments, the best performance in a decade – with 50,900 units in 2016 and 52,500 in 2017.

A newly published study shows that RV vacations cost substantially less than other forms of vacation travel, even when factoring in fuel prices and the cost of ownership. The baby-boomer generation has long been the mainstay for the RV industry, but increasing numbers of millennials have begun to enter the marketplace.

RV rentals have also remained solid, with a majority of dealerships that rent RVs reporting rising revenues and plans to expand their fleets. That's according to a new report from the Recreation Vehicle Rental Association (RVRA). RVRA Chairman Scott Krenek was very encouraged by the study, saying, "The RV rental market is healthy and growing. That's why so many RVRA members are looking forward to a great summer. Renting RVs is not only profitable, it helps drive interest in the RV lifestyle."

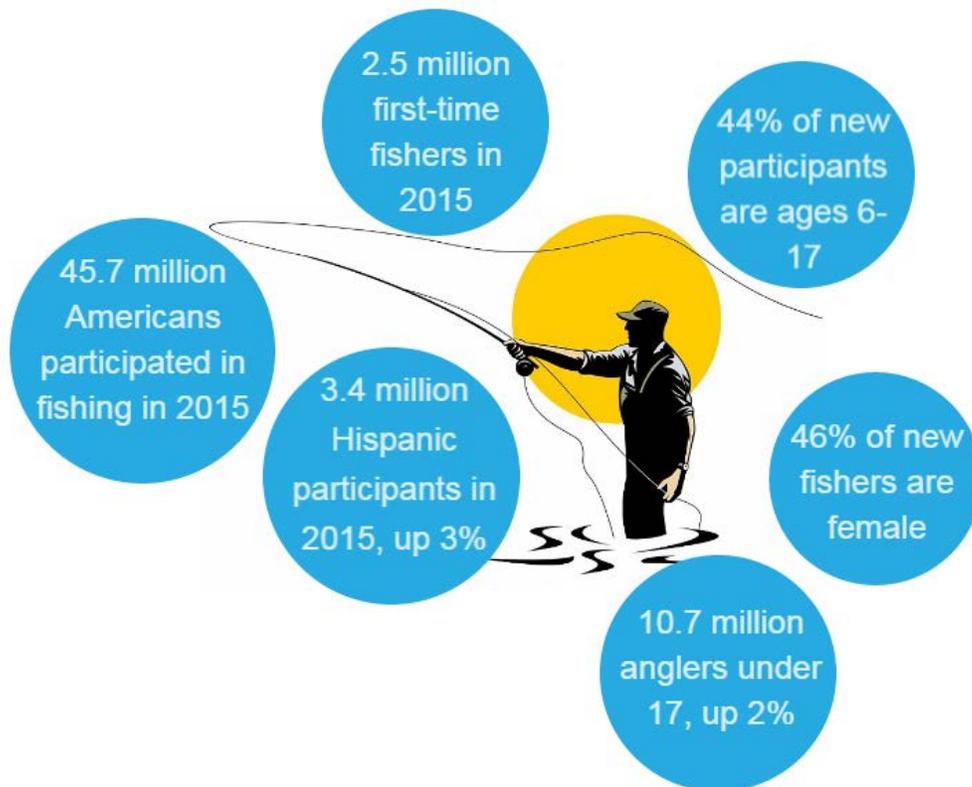
Fully 80% of rental operators who responded to the study reported higher revenues in 2015, with about half of those dealerships experiencing increases above 20%. Sixteen percent of dealerships surveyed had increases of 50% or more. Fifty-five percent of respondents said they plan to increase their rental fleets this year.

Class C motorhomes are the type of RVs rented by big fleet/multi-location rental agencies for whom rentals are their primary business, and 40% of respondents plan to include Class Cs in their inventory this year.

The rental survey also showed that towable RV rentals are rapidly growing in popularity, and 45% of respondents plan to include these units in their fleet. Almost 80% of dealers that rent towables will deliver units to a campground or other location for customers, and most are seeing an increase in customer requests for deliveries.

Recreational use of on- and off-highway motorcycles, ATVs, and ROVs is also growing. This sector of the recreation industry contributes nearly \$109 billion in direct spending to the U.S. economy annually and over 1.5 million jobs. Recreational off-highway vehicles (also known as side-by-sides) are becoming increasingly popular and are the fastest growing segment of the powersports market. Nearly 30 million Americans ride motorcycles on and off roads, and ATV ridership is some 35 million annually.

FISHING:



Fishing remains among the most popular outdoor activities for adults, according to the 2016 Special Report on Fishing from the Recreational Boating & Fishing Foundation (RBFF) and the Outdoor Foundation. Fishing is the second most popular outdoor activity for adults ages 25+, behind running. Freshwater fishing remains the most popular type of fishing, engaged in by almost 38 million people.

Outreach to the Hispanic population is also working. The number of Hispanic participants increased 3% in 2015 to 3.4 million people. And Hispanic participants average more than 25 days on the water per year, six more days than their general market counterparts.

Fishing remains one of, if not the most, social and spontaneous outdoor activities. Nearly 82% of fishing trips involve more than one person, and 81% of fishing trips are spontaneous or planned within a week of the trip.

“We are pleased to see many positive trends in this report such as increases for first-time, youth and Hispanic participants,” said RBFF President and CEO Frank Peterson. “Previous research tells us 126 million people have tried fishing, but with only 46 million actively participating, we have a big opportunity in front of us. The insights from this research will help RBFF and the fishing/boating industries ensure future growth for the sport, and the state conservation efforts that rely on it.”

CAMPING:

KOA – the nation’s largest private campground system – reports a very strong year across the board, with an increase of 4.5%. According to KOA’s 2016 North American Camping Report (available [here](#)), camping remains one of the most popular, affordable and accessible pastimes in North America. More and more Hispanics, African-Americans and Asian-Americans are finding camping to be their solution to stress and lack of quality family time.

For many North Americans, camping is the way they choose to connect with family and friends. The vast majority (85%) plan to continue to camp at least as much as or more than they have in the past. The rate of campers camping with children is now 50% and growing. About 20% of new campers are African-American, the majority of whom are also millennials. Additionally, 31% of new campers stay in some type of cabin accommodation, well above the overall rate.

Tent campers are showing the greatest change in their outings, with nearly twice as many taking longer outings, though fewer trips in number. And three in 10 campers overall intend to increase the number of trips they take in 2016; 46% intend to spend more nights camping.

Several technological factors are influencing how people choose campgrounds. Campers who expect free WiFi are three times more likely to be influenced in their campground selection by the presence of free WiFi. Surprisingly, millennials are no more likely to be influenced by, nor expect, free WiFi when compared to older campers.

BOATING:

The marine industry should grow for two to three more years as consumer confidence and spending continue to strengthen. That’s the message from National Marine Manufacturers Association President Thom Dammrich. “These really are good times in our industry, and fortunately those good times are going to continue,” Dammrich said.

From 2011 through 2015, boat sales grew in the 5 to 6% range, and according to Dammrich, retail sales could be up in the 8 to 10% range annually in the next several years. Most segments in new boat sales are growing, with personal watercraft sales increasing by 15.5%,

and pontoons by 11.5% from June 2015 to 2016. Cruiser sales grew nearly 1%, and saltwater fishing boat sales grew 9.4%.

“Pontoon boats and outboard [boats] are almost back to pre-recession levels in terms of units, and with the exception of runabouts, sterndrive cruisers and inboard cruisers, most of the other segments are 60 to 75 percent of the way back toward those pre-recession levels,” Dammrich said. “Most of the boating segments are back to pre-recession levels in terms of dollar sales.”

HORSEBACK RIDING:

Recreational horseback riding is the largest segment of the horse industry both in numbers of horses and economic impact. More than 1,000 different rides are available across America’s public lands. According to the American Horse Council, roughly 3.9 million horses are used for recreational riding. This segment of the horse industry alone contributes \$32 billion a year to the national economy. Recreational riding is directly responsible for 128,000 jobs and supports nearly 437,000 jobs in the U.S.

SKIING:

Last winter more than 23 million Americans participated in snow sports, including downhill skiing, snowboarding, cross country skiing and snowshoeing. They spent nearly \$5 billion at retail for snow sports equipment, apparel and accessories. In fact, the snow sports market generates millions in tax revenue and supports thousands of jobs across the nation.

According to the National Ski Areas Association, U.S. ski areas have averaged 54 million skier/snowboarder visits to resorts over the past five seasons. Last season saw a return to traditional winter-weather patterns on the west coast, resulting in near-record visits in California, Oregon and Washington. The destination resorts in the Rocky Mountain West had a very good year with strong ticket sales, up almost 13% over the previous year. The Midwest and East suffered through a warm winter with reduced snowmaking opportunities, resulting in double-digit downturns.

While it’s still early, forecasters are predicting a return to a more classic winter-weather pattern and, if so, the ski industry will see a bump from last year’s roughly 53 million skier/snowboarder visits to resorts.

Additionally, two million skiers and snowboarders chose the backcountry last season where no lift ticket is required. Many of those backcountry skiers and snowboarders headed to national and state parks to participate. There they joined millions of sledders and snowshoers looking for fresh snow, amazing winter vistas, and fun.

SNOWMOBILING:

Sales of snowmobiles remain steady, supporting five years of growth, according to the International Snowmobile Manufacturers Association. Over 60,000 new snowmobiles were sold in the U.S. last year. Annual registration of snowmobiles is reported at 1.4 million. Average use grew 10%, supporting expansion of snowmobiling’s economic impact in rural America. Fall shows are reporting record attendance and optimistic dealers are taking orders. Overall, the La Niña weather forecast of cold weather and snow has the community looking

forward to a great year.

ARCHERY:

Archery participation in America climbed about 14% from 2012 to 2014, boosting the number of archers to 21.6 million, an increase that can partially be attributed to the prominence of The Hunger Games books and movies. According to a study from the Archery Trade Association (ATA), 78% of archery participants are male, and 22% are female. Overall, archery participants are typically younger and from rural communities. Of the more than 21 million archers in the U.S., 45% shoot target archery only, while 24% identify strictly as bowhunters. ATA also found that the number-one influence in getting people into archery is family interest in the sport.

OUTDOOR ADVENTURE SPORTS:

Improved economic conditions and better weather resulted in stronger demand for outdoor recreation services in 2016 when compared to outfitters' performance in 2015, according to America Outdoors Association (AOA). Eighty percent of outfitters reported stronger demand and profitability in 2016 in the AOA annual survey; 73% of outfitters expect strong to modest growth in demand for their service in 2017. Growth is strongest among outfitters offering stand-up paddleboard instruction, cabin rentals, interpretive trips, environmental education and paddlesports activities. Moving forward, outfitters' number-one concern is the potential for higher fees, taxes and regulatory costs, followed by higher insurance and labor costs.

OUTDOOR RECREATION PROMOTIONAL CAMPAIGNS:

Outdoor recreation participation is being promoted by major sectors of the industry and by key federal agencies. Promotional campaigns like **Discover Boating** (led by NMMA), **Go RVing** (led by RVIA) and **Take Me Fishing/Vamos a Pescar** (led by RBFF) are generating billions of impressions and have a collective estimated budget of nearly \$45 million annually. Agencies like the Forest Service are also active, recently enlisting Disney's movie **Pete's Dragon** for public awareness and also using its Ad Council-supported **Discover the Forest** campaign to boost the sportfishing community's "**60 in 60**," which aims to grow participation to 60 million U.S. anglers within 60 months. Meanwhile, the National Park Foundation has invested millions of dollars in a **FindYourPark** campaign and Brand USA has invested millions of dollars in a new IMAX film receiving extensive domestic and international showings, **National Parks Adventure**.

Discover Boating's mission is to help attract the next generation of boaters to ensure a healthy future for the industry. In fact, nine million people say that boating is a worthwhile activity after viewing Discover Boating advertising. Fifty-four percent of visitors to DiscoverBoating.com are under 45 years old. Additionally, visits to the website by younger adults were up 27% last year.

Take Me Fishing has been a huge success. The campaign has generated 212 million media impressions as a result of a partnership with Walt Disney World, as well as a 20% increase in logo awareness. Its Hispanic outreach campaign, Vamos a Pescar, has earned 600 media stories, resulting in 89 million impressions and 33,000 social media followers.

TakeMeFishing.org had 10.6 million visits in 2016, up 16% from 2015.

SUMMARY:

Recreational activities continue to be a core part of the American lifestyle. Recreational activities are also a vital aspect of international visitation – in 2015, the Department of Commerce’s Survey of International Travelers to the US showed 35.4% of the nearly 40 million non-North American visitors to the USA included one or more national parks in their experience. Most components of the recreation industry reported significant gains in 2016 and the general outlook for the industry in 2017 is optimistic. Our conclusion in the comparable forecast last year was that recreation activities will increase as more people seek active, healthy, “high value” vacationing. Even more now, we see America’s great outdoors as a perfect fit for this desire.

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