

Outdoor Recreation Trends

Presentation to the Concessionaires and Public Lands
Symposium at Asilomar, CA

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The View from 40,000 Feet

- A big and potent part of the American lifestyle and economy
- \$400+ billion annually in economic activity
- Shaped by the abundance of public lands and waters – one in every three acres of the nation's surface
- A network of small and responsive businesses
- Public/private partnerships – for example in skiing, where 60% of downhill capacity is provided by businesses operating on national forests

The Overview, continued

- Public waters – 75% of all recreation occurs in a narrow band half of one mile wide along our coasts and shores of major lakes and rivers
- New systems – greenways and byways and more. Byways now include 150 nationally-designated routes stretching 30,000+ miles
- New technology has led to new popular activities – from geocaching to mountain biking
- Major building blocks of recreation include six activities of \$20+ billion: RVs, boats, skiing, fishing, hunting and adventure

2010 Experiences, Expectations

- 2010 was a good year – but a recovery year and uneven
- Record visitation at some key parks – like Yellowstone – even as NPS systemwide as down almost 2%
- Well-know, closer to home sites did well. Leisure air travel lagged, and impacted by both higher fares and perception of “hassles”
- Gulf and near-Gulf region suffered, even where no real impact of the oil spill occurred
- Spending on “extras” curtailed

Recreation Segment Reports

- Camping was a bright spot. Private campgrounds at near-record levels
- State park campground use generally up
- Most reports indicated shorter stays, and a shortened planning window
- Strong interest in cabins, park models, RV rentals
- Dramatic resurgence in new RV sales, although mix has shifted to favor towed and lightweight units
- Go RVing promotion campaign has attracted younger campers, more diversity

More Segment Reports

- Fishing was another bright spot, with fishing license sales up in 2009 for the first time in more than a decade, and further increase in 2010
- Participation boosted by Take Me Fishing promotion campaign and continued investment of federal and state funds, including taxes on fishing equipment and motorboat fuels and state license, registration fees
- Marina and boat dealers report steady usage, but sale of new boats remains depressed
- Gulf oil spill was a regional and national challenge

Segment Report -- Winter

- Ski areas reported second best year ever
- Strong increase in Millennials. Increase in international and overnight ski activities
- Ski region second home market remains troubled
- Snowmobile use strong, sales recovering. Fall 2010 consumer shows and enthusiast events at or near record levels
- Ski industry, in particular, is concerned about global climate change

National Parks

- Visitation peaked in 1987. In 2010, visitation will finish about 1% below 1987 level despite record levels of visits to Yellowstone, Glacier and other key parks
- Over the same period, US population has grown 26%
- If the proportion of Americans visiting parks had remained the same as in 1987, national park visits in 2010 would have been about 365 million – or 80 million more than actual visits
- Drop in recreation visitor hours even more significant – down 13%

National Parks, continued

- Overnight stays down 6% at concessioner lodging and down 16% overall
- Campground stays down 20% for tent campers and 32% for RV campers – even though RV usage is up 165%
- RVers choosing out-of-park campgrounds with better sites, hook-ups
- NPS campgrounds have not added cabins, yurts, park models
- Anomalies – where NPS has improved campgrounds as at Grand Teton: usage and occupancy % up

National Parks, continued

- Of nearly 400 sites, increases have largely been at best-known parks where lodging, food, transportation and retail services are provided by concessioners
- Ken Burns, Oprah and focus on 2016 campaign demonstrate breadth of interest in increasing quantity and quality of national park experiences
- Park concessioners have urged agency, Congress to add lodging and other capacity to in-park concessioner efforts
- Concessioners will expand guest contributions programs, seeking minimum of \$1 million annually

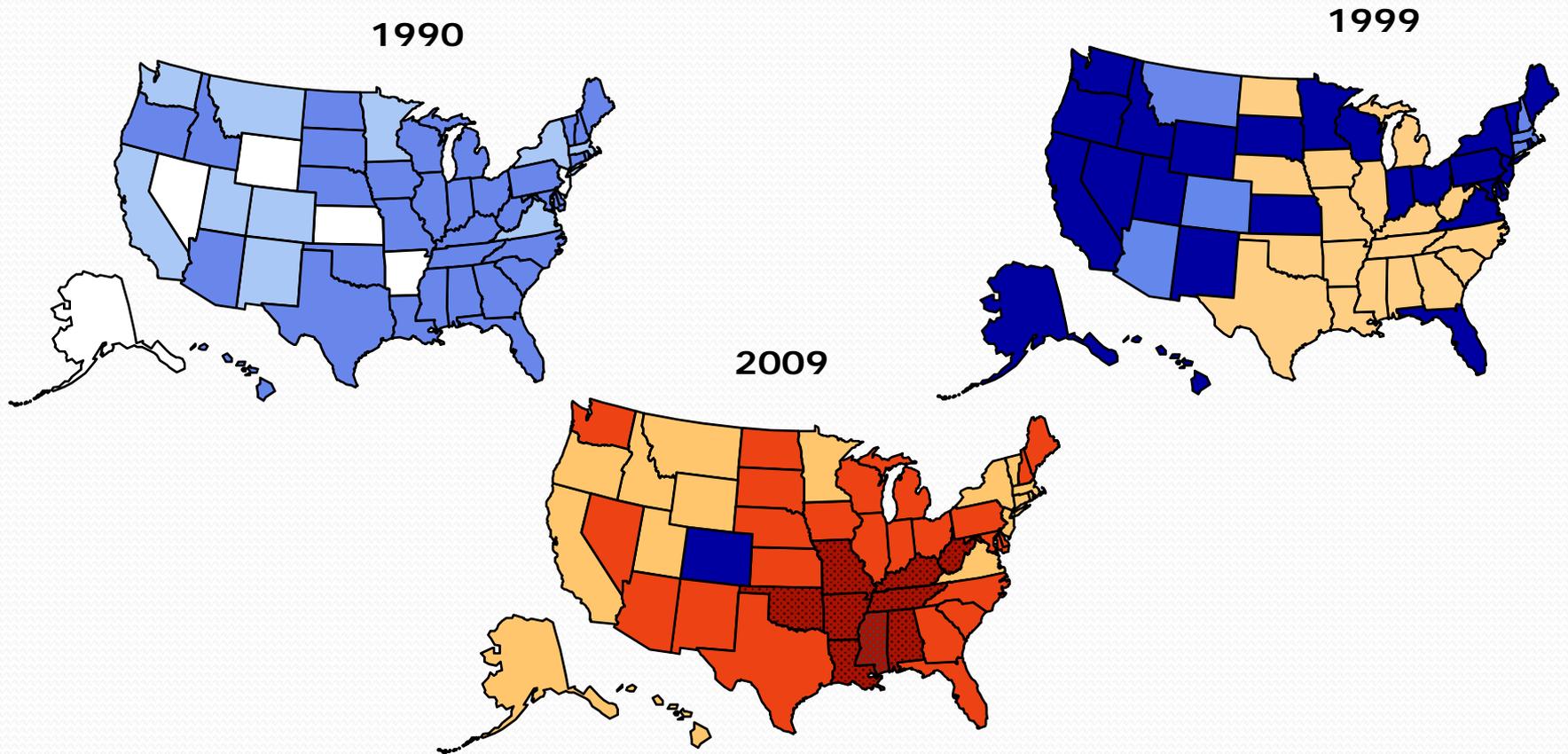
New Frontiers

- Health – now 16.6% of GDP and climbing
- \$2.7 Trillion -- \$8,000 per American in annual costs
- 70% of total costs are for lifestyle-induced chronic illnesses: consequences of smoking, poor diet, lack of exercise
- Surgeon General labels most lifestyle-induced chronic illnesses to be preventable
- NPS and others are increasingly active. 2007 pilot effort proved increasing physical activity during park visits to achieve daily recommended levels is practical

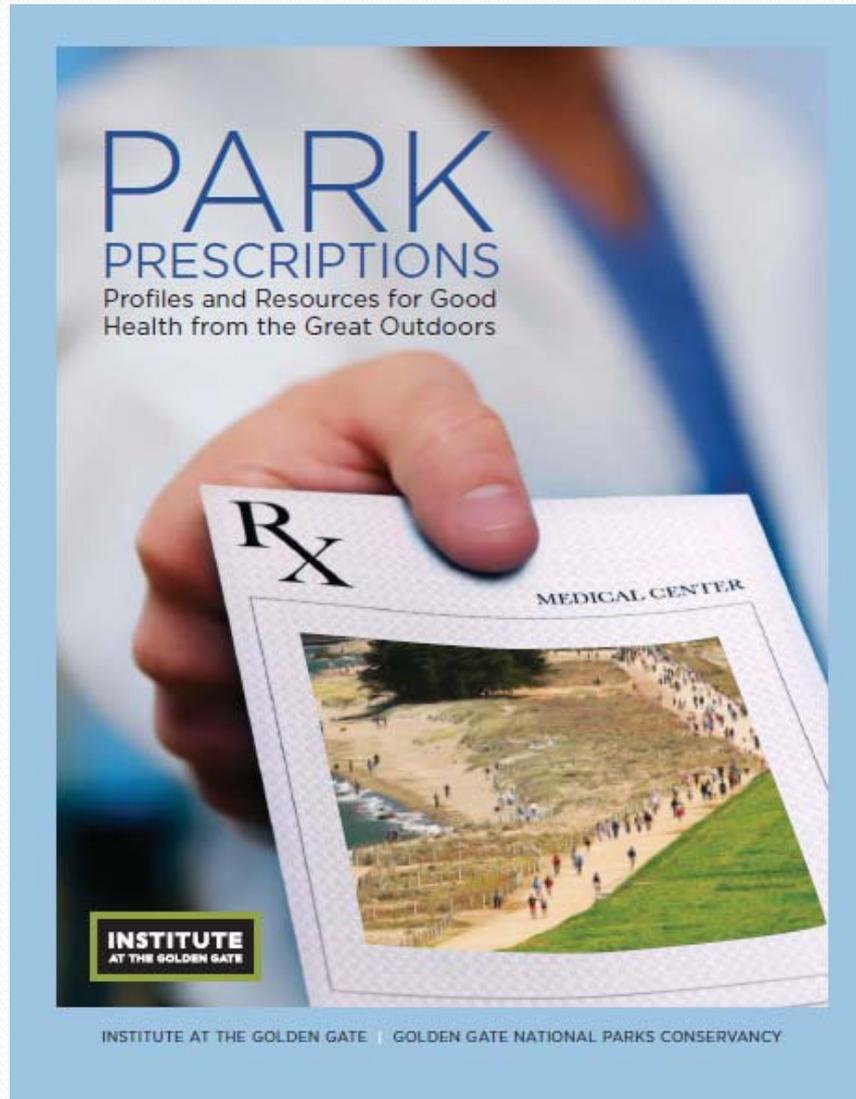
Obesity Trends* Among U.S. Adults

BRFSS, 1990, 1999, 2009

(*BMI ≥ 30 , or about 30 lbs. overweight for 5'4" person)



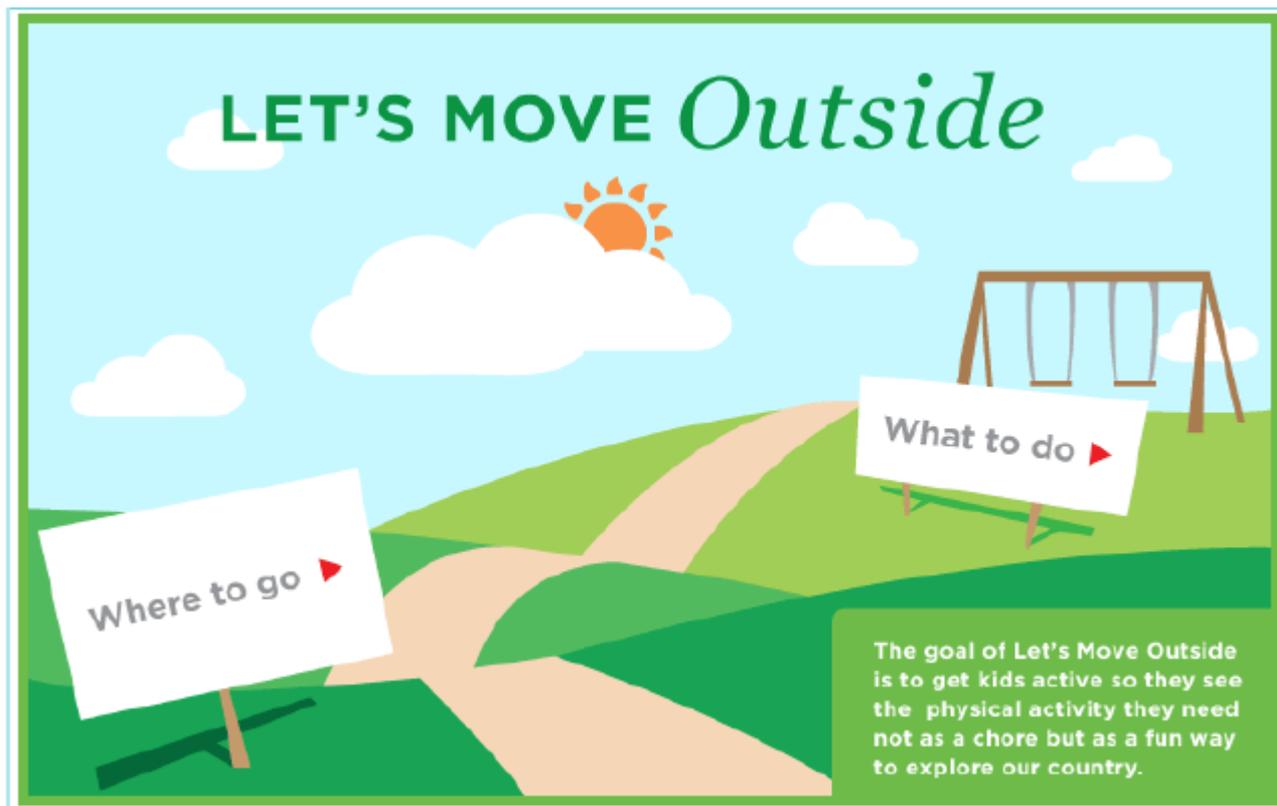
From Coast to Coast – Doctors Prescribe the Outdoors



New Frontiers, continued

- 2010: NPS is an active player in Park Prescriptions program
- New NPS team, led by Office of Public Health, underway
- America's Great Outdoors report, due to President in early December, expected to tout health and the Great Outdoors link
- Goal is to monetize parks role in health, gain health community contributions to operations and even capital needs. Australia is model

The First Lady's Campaign to Combat Youth Obesity



Support from Key Medical Organizations

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A prescription for better health: Go alfresco

Most of us spend the vast majority of our time inside. According to one government estimate, the average American spends 90% of his or her life indoors, and as we get older we become even more inclined not to venture out. But is all this indoor time hurting our health?

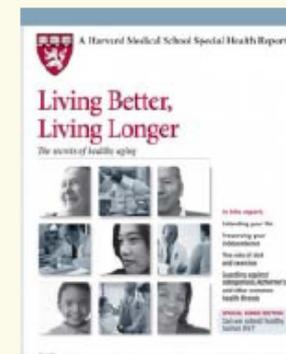
The study results are ticking up: spending time outdoors seems to have discernible benefits for physical and mental health. Granted, some are merely by association and can be achieved by other means, perhaps while indoors, but often only with a good deal more trouble and expense. Here are five potential benefits of spending more time outdoors:

1. Your vitamin D levels will go up

Exposing your skin to sunshine — actually, ultraviolet B (UVB) rays — enables the body to make vitamin D, which is why it's also known as the "sunshine vitamin." Research suggests vitamin D may have protective effects against everything from osteoporosis to cancer to depression to heart attacks and stroke.

Of course, it has to be sunny out, and there are some snags. Where you live, the season, and the time of day affect how much UVB reaches your skin. The farther you live from the equator, the less UVB radiation you receive. Vitamin D production is affected by age (people

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