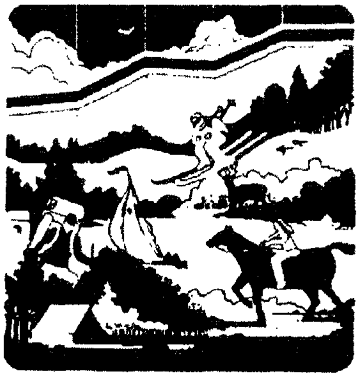

PROCEEDINGS

1980 National Outdoor Recreation Trends Symposium

Volume I

U.S. Department of Agriculture, Forest Service
Northeastern Forest Experiment Station
370 Reed Road, Broomall, PA 19008

Sponsored by:

Northeast Agricultural Experiment Stations, NE-100

USDA Forest Service

USDI Heritage Conservation and Recreation Service

Recreation Working Group, Society of American Foresters

University of New Hampshire, Recreation and Parks Program

In cooperation with:

Clemson University

Journal of Leisure Research

Purdue University

USDA, Forest Service General Technical Report NE-57

FOREWORD

Most of us would probably endorse a one-year moratorium on meetings, conferences, conventions, workshops, and symposia. In fact, this planning committee was so reluctant to assemble another conference that it spent nearly 2 years identifying the needs and developing the program. When the rate of change is as great as it has been in outdoor recreation, conferences such as this one become essential. This is an exceptional conference because it focuses on that change, documents it, and attempts to determine what its future implications may be.

Ten years ago, a Forest Recreation Symposium was held at Syracuse, N.Y., for the purpose of "consolidating and synthesizing past research efforts in outdoor recreation." Even a hasty comparison of these proceedings with those from Syracuse suggests the enormous volume of research that has occurred over these 10 years. Equally apparent is the change in the kinds of research information that are available today; from the static descriptive and prescriptive studies of the late 1960's to examinations of trends, shifts, and changes in the outdoor recreation economy. Effective planning requires this dynamic view of outdoor recreation. Because planning, whether for corporate investment or public development, is a long-range activity, it needs information that goes beyond simple statements of "what is" into the realm of "what has been" and "what will be."

Statistical reporting is a critical function of government. Without this essential service, it would be difficult, if not impossible, to assess the state of the economy, the quality of health care, or the adequacy of public education. Price indexes, business slumps, new construction, pollution levels, production facts, and employment figures pop out of Washington bureaus onto boardroom conference tables with almost biologic regularity. Agriculture, mining, housing, manufacturing, wholesale and retail trade, doctors, dentists, educators, butchers, bakers, and even high school guidance counselors have more federally-sponsored statistics to plan with than do the providers of America's outdoor recreation opportunities. We attempt to plan the future of the Nation's recreation resources in the absence of facts about the present level and rate of growth of private investment in leisure industries. We define policy on the basis of out-of-date data and ideas about public participation in recreation activities. And, we invest scarce research dollars in "problems" which may not exist, or might at least look different if we had adequate statistics with which to view them. This symposium will not correct the situation. It can only serve to heighten your present uneasiness over the quantity and quality of available trend data. But we hope it will instill an urgency within you to demand better, more current, and more comprehensive statistics on outdoor recreation in America.

Good planning has been described as a two-step process. "First you figure out what is inevitable. Then you find a way to take advantage of it." In assembling this collection of speakers and topics, we have provided you with the best available information on, if not the inevitable, at least that which is highly probable and highly improbable. Step 2 -- how you take advantage of that information --is what recreation researchers will be monitoring in the years ahead.

WILBUR F. LaPAGE, Chairman
Program Committee

American Demographics, September 1979. Used by permission.

THE 1980 NATIONAL

OUTDOOR RECREATION TRENDS SYMPOSIUM

Held at the New England Center for Continuing Education
University of New Hampshire
Durham, New Hampshire
April 20-23, 1980

SPONSORED BY

Northeast Agricultural Experiment Stations, Project NE-100

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CONTENTS

The Growth of Selected Leisure Industries[1]

Elizabeth R. Owen[2]

Rapidly rising sales of sporting equipment, as well as the phenomenal growth of receipts from a variety of recreation-oriented service industries, have contributed in establishing the recreation market as one of the most dynamic and fastest expanding sectors of the United States economy.

Please see the full Commerce report for a greater, in-depth treatment of the subject material. Tennis, boating, camping and skiing are treated in four individual chapters. Detailed tables on expenditures, rates of participation, etc., are also included.

OVERVIEW OF LEISURE INDUSTRIES

Expenditures on leisure activities, especially outdoor recreation, represent a major and growing segment of the American economy, having reached $81.2 billion in 1977, $20 billion more than in 1974. This spending represents 7 percent of total personal consumption expenditures and covers outlays for a multitude of leisure pursuits ranging from admission to movies and sporting events, to magazine and newspaper subscriptions, and to purchases of toys and sports equipment.

The $81.2 billion does not include such expenditures as transportation and lodging connected with pleasure travel, vacation homes, and public recreation. When these and other related activities are added, the combined total is much higher and although precise amounts are not available, one recent estimate put the grand total of leisure spending in 1977 at $160 billion.

A rough estimate of the major components of leisure activity breaks down the $160 billion total spent on leisure into:

> $27 billion for sporting goods purchases and associated service expenses.
>
> $58 billion for television sets, radios, records, musical instruments, reading material, admissions to sports events, movies, cultural events, clubs and fraternal organizations, gardening materials, and other personal consumption expenses such as pets, photography, etc.
>
> $71 billion for vacation travel, both domestic and foreign.
>
> $4 billion for vacation cottages, second homes, vacation lots.

The volume of retail sales generated by the demand for sports equipment is shown in table 2 which presents the 10 most popular categories in 1976, the last year ranking was available.

Sport equipment categories that are expected to have the greatest growth potential in the years ahead are soccer, racquetball, skiing, fishing, camping, softball, tennis, exercise equipment, sports apparel, and jogging shoes. Women's team sports equipment and apparel should also generate sales in the near future.

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[1] Paper extracted from The Growth of Selected Leisure Industries, U.S. Department of Commerce, May 1979. Available from U.S. Government Printing Office, Wash., D.C. Stock No. 003-009-00319-9. 41 pages.

[2] Recreation Analyst, Heritage Conservation and Recreation Service, U.S. Department of the Interior, Wash., D.C.

Table 2.-Retail Sales of Sporting Goods
(millions of dollars)

Category	Sales in 1976	Percentage Change 1975-1976
Recreation vehicles - - - - -	$2,700	16
Pleasure boats, motors and accessories - - - - - -	2,370	15
Firearms and hunting supplies - - - - - - - - -	1,120	5
Bicycles and supplies - - - -	957	12
Athletic equipment - team sales - - - - - - - - - - -	719	7
Tennis equipment - - - - - -	666	20
Golf equipment - - - - - - -	587	6
Fishing equipment - - - - - -	506	8
Snow skiing - - - - - - - - -	421	11
Camping - - - - - - - - - - -	386	7

Source: National Sporting Goods Association.

Product sales tell only part of the leisure story. Another part, probably the most dynamic one, is the services aspect of the recreation industry. For example, for skiers there are lift tickets to buy, for tennis players there are court fees, and for scuba divers there is the cost of refilling their tanks with oxygen. Other service activities would include equipment repair shops, facilities construction, management consulting firms, and professional sports instruction. These services are expanding more than the manufacturing sector, and will eventually form the heart of the leisure industry.

Further evidence of the magnitude and growth of leisure activities is attendance at major professional sporting events, which increased more than 45 percent between 1966 and 1976, as spending at these events almost tripled, from $668 million in 1966 to $1.5 billion in 1976.

More Time and Money for Leisure

The two major factors that have encouraged the explosive development of recreational markets have been time and money. In the past two decades, Americans have seen almost steady improvement in the amount of their time and money available for leisure pursuits.

While the 40-hour work week has remained constant since the end of World War II, the average worker now gets longer vacations and more holidays. This means that the average "leisure year" is 122 days--one-third of the total year. The expanded leisure year offers significant opportunities for outdoor recreation--fifty 2-day week-ends, a vacation period averaging 16 days, and at least five 3-day weekends associated with Monday national holidays. Leisure time is not expected to change to any great extent in the 1980's. While any decrease in total working hours is likely to be minimal, it is probable that further gains will be made in obtaining longer blocks of leisure time by reshuffling working time through such innovations as the 4-day work week and flexitime.

On the money side, real per capita disposable income (personal income adjusted for inflation and taxes) has been climbing steadily over the years, a fact that has contributed to the rise in discretionary income (money available for spending on items other than basic necessities). As a result, the long-term trend in recreation spending as a percentage of personal consumption expenditures grew from 5.5 percent in 1960 to 6.8 in 1975. This upward trend has leveled off slightly in recent years, mainly because of inflation which takes a larger share of personal income to cover the higher costs of housing, food, utilities, and medical care.

Spectator and Participatory Sports

Both spectator and participatory sports are contributing to the outdoor recreation boom. Professional sports leagues now operate nationwide in baseball, football, ice hockey, basketball, soccer, volleyball, softball and tennis. Since 1965, the number of major-league teams in all professional sports has jumped from 57 to close to 200. Additionally, touring golf, bowling, and tennis professionals criss--cross the country the year round for weekly tournaments.

Professional sports are thought to be still in the growth stage--with good opportunities for further expansion, particularly internationally. More and more U.S. teams will be playing in other countries in the near future, and the possibility of pay television is expected to have positive impact on pro sports. The major TV networks are increasing their sports coverage markedly, a fact that contributed tremendously to stimulation of interest. Spectator attendance at the 18 most popular major sporting events increased from 217 million in 1966 to 314 million in 1976.

The enormous growth in participatory sports has been even greater than that for spectator sports. There has been a greater popularization of sports activity among all classes and ages. Tennis, sailing, and squash were once the sports of the rich. Bicycling and rope jumping were formerly limited mostly to children. Camping, jogging and weight training were once considered only the idiosyncrasies of nature and physical fitness aficionados. All these sterotypes have disappeared now.

The recent surge in sports participation is the result of years of publicity about the benefits of exercise and better nutrition. Starting in 1975, American deaths from cardiovascular disease fell for the first time in a decade. New figures show that the mortality rate from heart ailments, long known as the epidemic disease of this century, has declined by more than 30 percent since 1950.

So popular has exercising become, that there are now an estimated 3,000 health clubs and spas around the country with several million members. The benefits of exercise also are being increasingly recognized by private industry which loses each year an estimated 52 million workdays to heart disease and $1 billion to common backaches. Many businesses are providing facilities and organized physical fitness programs for their employees, varying from a single softball field to million dollar exercise facilities run by professional staffs.

This increased interest in physical fitness and its physiological payoffs do not appear to be spread equally among the population. Results of studies indicate that most of the exercising is being done by the young, the better educated, and the affluent, by men more than women, and mostly by those in the Northeast and Far West.

Manufacturing, Distribution, and Employment

Scarcity of market data and occasional over-estimation of demand are partly rooted in the structure of the industries providing sporting goods and equipment. At the manufacturing level, only a few firms qualify as "powerhouses," with thousands more small firms in existence. Additionally, there are many small manufacturers who drop-ship directly to dealers, avoiding the traditional wholesale distribution system. This direct factory-to-dealer relationship is more extensive in the sporting goods industry than in most other consumer goods lines. Only the firearms and fishing tackle industries have substantially organized wholesale distribution.

Because of a lack of truly national sporting goods chains, the retail sporting goods industry is as fragmented as the manufacturing side. If more national chains existed, more standardization of products would probably occur, although favorable customer reaction to fewer, more standardized products in sports is somewhat doubtful since players seem to demand higher quality and more customized equipment as they become more skilled in their sports.

Following the trend of many other retail operations, the size of sporting goods stores in the future will tend to be either small and very specialized, or very large and general. Large stores, many of which are discount operations, are expected to increase their share of the total market from 15 to 25 percent by the mid-1980's, and will become involved in the service end of sports, such as repairing the equipment they sell, renting equipment, offering lessons, or sponsoring clinics or trips.

A more specialized, but growing aspect of sporting goods retailing is mail order sales of sporting goods and recreation equipment. Reflecting a growing belief that mail order purchasing is a more convenient and more budget-conscious way to buy, sales for 1975 are estimated to be about $113 million. Some acquisitive interest on the part of a number of conglomerates has also been reported in recent years.

Full-time and part-time employment opportunities in recreation are plentiful and are expanding rapidly. For instance, there is a growing demand for professional sports instruction, with tennis as the best example of this trend. Additionally, professional opportunities exist in sales and management of retail operations, management and maintenance of sports facilities, equipment repair, and consulting services for the development and management of sport facilities and sports programs.

Private sector employment opportunities are expanding and appear to offer the greatest potential. The U.S. Department of Labor in its Occupational Outlook Handbook predicts good employment opportunities in recreation in the 1980's. Estimates are that the private sector provides approximately 5 million jobs in recreation or leisure industries.

Public sector employment is smaller but still significant. An estimated 80,000 to 85,000 people are employed in Federal, state and municipal public recreation programs. These jobs are with parks, campgrounds, swimming pools and beaches, ski areas, arts and crafts programs, tennis facilities, and urban playground and recreation program centers. All of these activities require managers, planners, instructors, and maintenance professionals.

Various development assistance agencies, such as the Small Business Administration, the Economic Development Administration of the U.S. Department of Commerce, and the U.S. Department of Labor under the Comprehensive Employment and Training Act, are including construction of recreation facilities among their grants to stimulate employment. Some examples of where this funding is going are: a multi-million dollar grant for the refurbishing and building of sports facilities for 1980 Winter Olympics which will be held at Lake Placid, New York; construction of a freshwater lake/reservoir in Illinois also including designs for multiple recreation use; and grants to various localities for the construction of tennis courts, inner city recreation centers, and bicycle trails over abandoned railroad track beds.

Recreation and Travel

Few industries have as many areas of mutual interest and benefit as the recreation and travel industries. In effect, many recreation activities could not occur without the services of the travel industry. Conversely, a good portion of the travel industry is totally recreation-oriented, such as resort hotels, destination resorts, and ocean cruises. Resorts and carriers provide the means and destination activities that induce people to travel and attract them to a particular place, while the manufacturers of leisure-time products provide the tools of play.

A further benefit that results from this symbiotic relationship is the removal of the "fad" aspect from sports. Patronage of a resort for a particular sport in effect institutionalizes that sport. Permanent facilities--ski slopes, golf courses, tennis courts, marinas, bike paths, and pro shops--induce return business. Organized participation practically guarantees not only repeat equipment buyers, but also repeat resort customers.

The love affair with the "active life" has brought a radical attitudinal change to many Americans' approach to leisure. Leisure time has become just as important to them as their work lives. As with their careers, they are frequently setting goals for their leisure time, such as becoming a ranked tennis player, getting rid of a slice in their golf game, or training for the Boston Marathon running classic. In addition, more people are taking vacations with an athletic purpose. For example, in 1975 some 12 million people played golf, tennis, or skied while on vacation or in the course of taking trips. Of these 12 million, half took a trip for the primary purpose of engaging in one of these sports. Added to this group are uncounted millions who took a trip for the purpose of fishing, boating and other water sports. Assumptions are that vacations or trips whose primary purpose is to take part in a sport will increase in the future.

Tremendous opportunity for growth for the hotel/motel industry exists in the pleasure travel market. Many operators are beginning to add to their properties such features as athletic and health club facilities, tennis and handball courts, saunas, and tie-in arrangements with nearby golf courses or ski areas.

Package plans that cover lodging costs and sports admission fees or equipment rentals for one price are becoming extremely popular. Properties that are located in winter ski areas or include golf course, tennis court or horseback riding facilities have been the most extensive users of such package plans.

Other factors have encouraged businesses to concentrate marketing efforts on the pleasure travel market. The introduction of new, more economical types of air charters in the mid-1970's, the elimination by the Civil Aeronautics Board of many restrictive regulations on air charters, and the CAB's easing of discount air fares have also stimulated consumer interest in travel. The seemingly unending boom in U.S. travel by Americans and foreigners will undoubtly further stimulate new and existing recreation markets, while the travel and leisure industries will cooperate more with area retailers in joint promotion, such as packaged sports tours, resort programs of sports' instruction, and hotel sponsored weekend skill workshops.

Women's Involvement

Sales of almost all types of recreational goods and services to women are an area of both current growth and future potential. Women of all ages and all socio-economic levels are taking up a variety of sports, many for the first time. For example, more women are playing tennis now; one survey by the National Tennis Foundation reported an estimated increase of 50 percent from 1973 to 1974. A survey conducted by the National Federation of State High School Associations showed considerable increases in the number of girls participating in inter-school golf, skiing and tennis competition, which is a sharp reversal from the situation existing just a few years ago. Then not only inter-school female team competition, but any female athletic program, was the exception rather than the rule.

One major factor adding to growth in women's sports participation at high school and college levels has been Title IX of the Education Amendments of 1972. Under Title IX, schools receiving any form of Federal financial assistance must make athletic equipment, facilities, and opportunities equally available to both sexes. Since the athletic budget for women at the collegiate level was only 2 percent of the men's budget in 1975, a tremendous potential market for sporting equipment, footwear, apparel, and services specifically designed for women exists. In addition to the growth of the women's school athletic market, possibilities for a large increase in the number of women's athletic teams in industrial or high school teams.

While in their infancy women's professional sports are enjoying a healthy and rapid growth. Women professionals in golf and tennis are competing for purses in the hundreds of thousands of dollars, up from just a few thousand dollars in the most recent years past. Other sports that are fielding women professionals and pro teams are skiing, softball, volleyball and basketball. Many industry observers feel that women's professional basketball will develop into a major spectator sport in the next few years.

By far the greater increase in women's sport participation has been on the individual level. Apart from tennis that has enjoyed the greatest growth in popularity among women, a 1976 Nielsen survey indicated that 21 million American women participate in fishing, up from 9 million in 1970, slightly over one and one-half million women go in for hunting, up from 869,000 in 1970, and 20 percent of the Nation's scuba divers are women, up from 5 percent in 1970. There are now several fishing, hunting, and outdoor groups specifically organized for women's membership; these groups have helped promote interest among women in these traditionally male-dominated sports.

This positive projection of the women's market for recreational goods and services is underscored by current trends in the employment and income levels of women. For the first time in history, a majority of women between 18 and 64 are employed, and demographers feel that this percentage will increase from the present 52 percent to 65 percent in 1987. Female purchasing power is also increasing not only in terms of the number of women who earn independent incomes but in their wage and salary levels as well. These economic factors greatly enhance the potential of the women's side of the leisure market.

Future Developments

The surge in the young adult population which will continue for the next few years is favorable for most segments of the recreation industry, especially for those selling equipment for active sports and outdoor activities. Headed by men and women of ages 25 to 34, this group is more than 50 percent larger than a decade ago and should increase by another 35 percent over the next decade. But even in the areas of less active sports, greater longevity, improved health care, and increasing numbers of people on adequate retirement plans strongly suggest a sturdy market for the relatively less strenuous type of activity.

Another favorable demographic factor affecting recreation industries is the geographic movement of population. Already a definite shift of the U.S. population to the South and to the West has occurred. During the next decade, the South is expected to increase its population by 20 percent, the Mountain States by 24 percent, the Southwest by 25 percent and the West by 18 percent, while at the same time large population centers in the East and Midwest will decline.

To understand the factors that have contributed to boom times for the recreation industry in general and for outdoor sports in particular, please see my full study. The sections on tennis, camping, boating, and skiing will analyze their current market performance and try to project their future growth.

TRENDS IN FINANCING AND AVAILABILITY OF CAPITAL[1]

Donald C. Schink[2]

Abstract.--The past, present and future of recreation enterprise financing is developed in this paper. Developers need to utilize all available methods of financing sound projects. The long-term solution to the problems depend on better information, improved educational programs, and a loan program tailored to the needs of this industry.

HISTORICAL PERSPECTIVE

Early travelers utilized small hotels, roadside cabins, restuarants, taverns and other service facilities for their needs. They often camped at the side of the road. Sportsmen generally felt that all public and private land was available to them for hunting and fishing.

The resort industry in many states got its start as hunting and fishing camps. These consisted of crude cabins with outdoor plumbing and a row boat.

From these beginnings, the recreation-tourism industry gradually evolved into what we know today. Included are resorts that cater to visitors during all four seasons, attractions that provide entertainment to large numbers of people, motels, restaurants, golf courses, ski hills, and all of the support enterprises.

The commercial recreation sector has been enhanced by the development of many national, state, county and city parks and recreation programs.

Recreation enterprises have generally been small, family owned businesses, often located in remote locations. They often have been under financed and having managers with little training or experience. The recreation industry is plagued with short seasons, unpredictable weather, government regulations and governmental competition.

In 1965, we held a public policy forum in Fifield, Wisconsin on the topic of "Financing for the Recreation Industry." It was attended by leaders from local government, the resort industry and bankers. The meeting was called because of the problem of securing loans to upgrade and expand resorts and other recreational enterprises. It was the conclusion of the leaders attending that:

1. There was a need for educational programs to improve the management of enterprises.

2. New governmental programs were needed to provide long term loans to recreational enterprises.

It would be interesting to repeat the Fifield conference of northern Wisconsin leaders at this time. Their recommendations might be about the same in 1980 as they were in 1965. Our basic problems remain.

The cost of capital has varied somewhat over the years but always seems to gradually increase. During the 50's and early 60's, interest rates for commercial loans were in the 5 to 6 percent range. From the mid 60's through the mid 70's the interest rates generally increased to the 8 to 9 percent range. In the late 70's, we saw a rapid escalation of interest rates with prime interest rates reaching as high as 15.5 percent.

Recent higher interest rates have been accompanied by shortages in the money mar-

[1]Paper presented at the National Outdoor Recreation Trends Symposium, Durham NH, April 20-23, 1980

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ket. Only the most profitable enterprises receive loans in times of high interest rates and tight money supplies. Recreation enterprises with their traditional low profitability end up on the bottom of the priority list.

Most financial discussions center around the availability of mortgage loans needed to finance recreation developments. We are also concerned with the amount of equity that must be invested by the owner/developer. In many cases this limits the size of projects that can be developed and contributes to the project's security.

ANALYSIS OF LENDING SOURCES

Commercial recreation enterprises have relatively few sources of mortgage financing for new or expanded businesses. They generally are banks, the Small Business Administration and the Farmer's Home Administration. In some instances, the Economic Development Administration has provided mortgage funds.

Banks

The prime sources of funding for small businesses has been their local banks. They have the capability of making loans on the real estate, equipment, and operating capital. Banks generally have lending limitations to individual borrowers of approximately 20 percent of their capital and reserves. They also have a total lending limitation. Innovative bankers have provided mortgage dollars to clients by utilizing correspondent banks, by syndicating loans with other lenders and by utilizing SBA or FmHA guarantees.

Small Business Administration (SBA)

The SBA was established by Congress to aid, counsel and protect the interest of small business concerns in order to preserve the nation's free enterprise system. SBA provides loans or loan guarantees for land, buildings, equipment, inventory and working capital. Generally, money is provided by a participating bank with SBA guaranteeing up to 90 percent of the loan. Loans do not exceed $350,000.

The scope of the SBA loan program in 1976 was provided in a paper prepared by Dr. Malcolm Bevins (Table 1). Similar information for 1977, 1978 and 1979 was provided directly by SBA.

Table 1.--SBA Loan Approvals (Total U.S.)

INDUSTRY DESCRIPTION	NUMBER OF LOANS 1976	1977	1978	1979
Eating Places	1,983	2,620	2,739	2,668
Hotels, Motels and Tourist Courts	238	286	344	274
Gasoline Service Stations	482	587	557	565
Drinking Places	286	306	318	275
Miscellaneous Recreation & Amusement	132	201	223	200
Sporting Goods and Bicycle Shops	304	347	331	306
Aircraft, Go-Cart, Motorcycle Dealers		119	101	96
Gift, Souvenir, Novelty Shops	182	224	265	223
Boat Dealers	53	80	72	70
Sporting and Athletic Goods Mfg.		53	41	51
Trailer Parks and Campsites	42	52	64	46
Trailer and Mobile Dwelling Mfg.		12	12	11
Camera and Photo Supply Store	49	54	48	49
Boat Building and Repairing	24	46	43	46
Arrangements for Transport	16	28	41	50
Sporting and Recreation	20	20	20	14
Public Golf Courses	7	21	17	11
Small Arms Mfg.		6	3	1

Source: Mr. Richard P. Lewis, Director, Reports Management Division, Small Business Administration, Washington, D.C., Feb. 6, 1980.

Table 1 (con'd).--SBA Loan Approvals (Total U.S.)

INDUSTRY DESCRIPTION	VALUE OF LOAN ($ in Millions) 1976	1977	1978	1979
Eating Places	$153	$244.8	$292.5	$311.1
Hotels, Motels and Tourist Courts	$ 36	$ 56.6	$ 74.7	$ 61.3
Gasoline Service Stations	$ 24	$ 33.3	$ 39.9	$ 31.7
Drinking Places	$ 18	$ 23.1	$ 24.3	$ 26.0
Miscellaneous Recreation & Amusement	$ 16	$ 30.6	$ 29.7	$ 31.5
Sporting Goods and Bicycle Shops	$ 16	$ 22.1	$ 21.2	$ 25.9
Aircraft, Go-Cart, Motorcycle Dealers	$	$ 9.6	$ 8.5	$ 8.4
Gift, Souvenir, Novelty Shops	$ 6	$ 9.5	$ 12.1	$ 12.3
Boat Dealers	$ 5	$ 9.1	$ 7.3	$ 6.8
Sporting and Athletic Goods Mfg.	$	$ 7.6	$ 6.8	$ 9.0
Trailer Parks and Campsites	$ 4	$ 7.4	$ 10.0	$ 7.8
Trailer and Mobile Dwelling Mfg.	$	$ 1.7	$ 2.3	$ 1.6
Camera and Photo Supply Store	$ 3	$ 2.7	$ 3.0	$ 3.7
Boat Building and Repairing	$ 2	$ 5.8	$ 6.0	$ 6.2
Arrangements for Transport	$ 2	$ 1.1	$ 1.5	$ 3.2
Sporting and Recreation	$ 2	$ 2.1	$ 2.4	$ 1.3
Public Golf Courses	$ 1	$ 4.4	$ 3.7	$ 1.7
Small Arms Mfg.	$	$ 1.1	$ 0.5	$ 0.1

Source: Mr. Richard P. Lewis, Director, Reports Management Division, Small Business Administration, Washington, D.C., Feb. 6, 1980.

Farmer's Home Administration

The Farmer's Home Administration of the U.S. Department of Agriculture has the authority to make loans for outdoor recreation. They make loans under 1) Business and Industry, 2) Recreation Facility loans to farmers and 3) Community and Non-Profit Loans program. Commercial recreation enterprises can apply for Business and Industry loans. Under this program, the FmHA would guarantee up to 90 percent of the loan. Generally, FmHA makes loans of over $350,000. They cannot make loans in or near metropolitan areas (over 50,000 population).

Dr. Bevins reported the number and amount of loans made for recreation in 1972 and 1976. they are listed in Table 2.

Table 2.--Financial Assistance Programs Extended to the Recreation Sector (Total U.S.) by the Farmers Home Administration, USDA, 1972 and 1976.

PROGRAM	NUMBER OF LOANS 1972	1976	AMOUNT OF LOANS 1972	1976
Business & Industry (Recreation Loan Guarantee)	0	69	0	$37,858,028
Recreation Facility Loans to Farmers	48	38	$1,807,820	1,772,090
Community & Nonprofit Loan Program	9	17	N/A	3,800,000

Source: Data supplied by Farmers Home Administration, August, 1977.

In comparison, Wisconsin's FmHA loans for recreation during the past five years is as follows:

	# Loans	Total Loaned
Nonprofit Corporation	2	$ 96,000
Municipality	1	340,000
Individual Recreation (Farmers)	96	2,789,000
Profit Corporations (Guaranteed)	7	8,193,000

Economic Development Administration

The EDA has authority to make loans for recreation enterprises in EDA designated areas. These generally are areas of high unemployment. However, most of their dollars are allocated to public works projects. It is difficult for commercial recreation enterprises to qualify for EDA funding because most are not labor intensive.

INNOVATIVE APPROACHES TO FINANCING RECREATION PROJECTS

We are in an era of tight money, fluctuating interest rates (generally higher), soaring construction costs, and shifting markets. Yet there are recreation projects that need to be built, and enterprises that should expand. Financial advisors will need to help prospective businesspersons, and developers utilize the financial tools available to them. Following is a review of some of the finance systems used by financial managers.

Industrial Revenue Bonds

Many states have a program to assist new industries to get started in the communities. Generally the municipality will authorize a municiple revenue bond issue so that they can be sold to investors as tax-free municiple bonds. However, in most cases the local municipality does not guarantee the bonds. The bonds are sold to banks, individual investors or mutual funds. The advantage is that new mortgage dollars are brought into the community and the borrower has a favorable interest rate. The bond rating is based on the individual project and the developer.

In some states, outdoor recreation and tourism related developments are eligible to utilize the industrial revenue bonding program. In other states, they are excluded or there are limitations on its use. New or amended legislation may be required in several states to make this program applicable to the recreation enterprise.

Tax Incremental Financing (TIF)

A new program for Wisconsin, Minnesota, Iowa, California, Oregon and perhaps other states is the utilization of Tax Incremental Financing to assist new developments. It has been used initially to revitalize blighted areas, but has potential use for some recreation developments. Basically in the Tax Incremental District (TID) created, the municipality uses taxes accruing from the increased value of the property in the district to amortize loans used for all or part of the improvements. It has financed land write-down, cost of providing city services, and in some cases construction costs. This program would seem to have the most potential in urban areas but with some application in the more rural communities.

Joint Venture Capital

A joint venture is generally when two or more parties gamble together on the success or failure of an investment. In the past, it has been a group of two or more investing a combination of land resource, expertise and equity to secure traditional mortgage financing to build a business. Many of the mortgage bankers and insurance companies now want to be included as a limited or full partner in the business. The advantage to the developer comes in the early years because she/he is not locked into rigid debt service payments. Each investor receives a percentage of the profits. The advantage to the lender comes in the form of early years tax credits and losses, a share of the appreciating value of the business and a continuing share of business profits. A joint venture in and of itself does not create any legal relationship between the parties. This is done through formation of a corporation or a limited or general partnership.

Limited Partnerships

A limited partnership is a legal business entity that provides a vehicle for developers to put together equity from several investors. In this arrangement, there is a general partner who provides all of the management with/without some equity dollars and a number of limited partners providing most of the equity investment. The limited partners offset profits, losses and tax credits of the partnership directly against other income. Limited partner investors generally have financial exposure only to the extent of their investment provided they do not enter into the management. They trade the right to participate in Management decisions for the security of limited exposure.

Condominium Financing

Some recreation related projects are financed by the user. This is usually done through the condominium vehicle. In this development strategy, apartments, campsites, boat slips, etc. are sold to the recreational user. In some cases, purchases are made by investors with the prospect of rental income. In condominium projects the developer/manager does not have the burden of capital costs to amortize out of operating income. This type of development was observed first in areas of high recreation demand and generally high land costs. There were condominium apartments and/or town houses on the ocean front in Florida and in the ski resorts of Colorado, condominium campgrounds in California and Michigan and condominium marinas on the Great Lakes. A variation of the theme is the use of Interval Time Share Condominium Sales. In this scenario, users purchase the use of the condominium unit for a specific period. For example, a user might purchase the use of the condominium for the first two weeks in July and would have the use of it every year during this period.

Stock Corporations

Equity capital can be accumulated for recreation developments through the sale of stock to investors. This allows for larger scale enterprises than might be possible by an individual with limited resources. It also spreads the investment risk to a number of individuals. Stock sale is used by both profit and nonprofit corporations.

The nonprofit corporation is a popular way of financing and operating many outdoor recreation enterprises. Most notable are golf and country clubs, hunting and fishing clubs, swimming clubs and tennis or racketball clubs. In this mode of development, the users are the owners and fees are set to cover costs of operation.

Public/Private Coorperative Ventures

A combination of public/private investments have been used in a limited degree in the past. Generally, it occurs when state or federal parks lease land or provide land for recreation development. Examples are the western ski areas where the ski slopes and trails are generally part of the National Forest and resorts and campgrounds leased to private operators by the U.S. Park Service.

Many rural communities with limited population will need to be innovative and get cooperation from all possible sources if they hope to provide the recreational opportunities enjoyed by more metropolitan areas. Think for a moment about the swimming club (nonprofit) and the high school that joined forces to build an indoor swimming pool in Madison, Wisconsin. This same concept could be used by smaller communities for a number of activities needing expensive facilities.

For example, an indoor tennis club requires 100 players (members) per court to have a profitable club. However, if the local school system needs additional physical education space and the facility were located properly it could be used by the school during the day. The tennis club could use the facility during the late afternoon and evening hours. Each would have the use of the facility during their prime time. By cooperating in a venture, small communities could provide more recreational opportunities to their people.

LONG TERM SOLUTIONS

The problems of financing and the availability of capital are not unique to the field of recreation. Over the years we have observed all other sectors experiencing similar problems and to some degree solving their financial problems.

The recreation sector has its special problems. They relate to the seasonality of many recreation businesses, low level of managerial abilities in many small businesses and generally low profits in the industry. The state of the economy and the fuel situation creates additional uncertainties.

Research Information

If the recreation sector is to compete for scarce equity and mortgage dollars, we must have the necessary tools. Information (facts) on the recreation sector is often sadly lacking. Without this information, it is difficult to prove the feasibility of new or expanded enterprises.

If we are to secure financing, researchers need to provide current, reliable information related to:

1. Supply of recreation facilities.

2. User studies giving profiles, demands, trends and expenditures.

3. Threshold studies showing the number of people required to support specific enterprises.

4. Investment costs for each type of recreation development.

5. Impact and costs of recreation/visitor spending.

6. Typical operating statements (standards) for the several recreation enterprises.

Education

Critical to the solution of financing problems is the delivery of research and information to decision-makers. This function is being carried out to varying degrees in the several states by University Extension Programs, the Vocational-Technical schools, colleges and universities and by individual consultants. One of the larger educational efforts in recreation is in University of Wisconsin-Extension. In Wisconsin a team of nine specialists (7.2 FTE) at the Recreation Resources Center work with some 50 county and area agents to provide research and information to recreation managers through workshops and individual assistance.

Information more than anything else will help solve our finance problems. This current, reliable information must be in the hands of the owner/manager/developer of recreation facilities. It must also be understood by the lenders. A knowledgeable developer dealing with an informed lender has the best chance of success.

Local people in a community often do not participate in the financial transaction. However, their understanding and support of projects can be critical to the projects success. We need to provide information on the benefits and the costs to the community of new or expanded enterprises.

Legislation

The recreation sector has long argued for financing programs that are tailored to meet their needs. Features desired would be:

1. Long term mortgages.

2. Modest equity requirement.

3. Fair interest rates (comparable to other good investments).

4. Repayment schedules designed to correspond with peak income months.

5. An agency that is informed and knowledgeable regarding recreation.

6. A minimum of paperwork.

7. Decisions in a reasonably sho

8. A recreation sector program t not need to compete with manu ing, agriculture, retail and service businesses for availa financing.

TRENDS IN PRIVATE AND COMMERCIAL RECREATION

1979[1]

Arlin F. Epperson[2]

Although there has been substantial growth in the supply of outdoor recreation resources, there is no existing system or program to track annual changes in private and commercial facilities or enterprises.

This paper traces efforts to assess the supply of private recreation resources and provides the reader with information on where to look for data on the private sector.

INTRODUCTION

Few serious students of trends in recreation would not agree that recreation has increased in the recent past by almost any measure. The problem has been to accurately assess the amount of the increases.

One of the problems in these assessment efforts has been inconsistent definition of measures. For purposes of this paper "Demand" will be defined as the amount of participation, as measured by visitor days, participation days, contact days, activity days, or the dollars spent on recreation and leisure pursuits. "Supply" will be used to categorize the number of facilities, number of acres, or other measures of the physical facilities themselves rather than those who use them.

Several previous efforts to measure demand and supply are worthy of mention.

ORRRC REPORT

The first nationally recognized efforts to assess the demand and supply of private and commercial recreation was the Outdoor Recreation Resources Review Commission's report, "Outdoor Recreation for America," Volumes 1-27, published by the Federal Government in 1962. One entire volume "The Private Sector Study of Outdoor Recreation Enterprises" was given to the demand and supply of private and commercial recreation.

In reporting demand, the Private Sector study found that recreation areas and facilities provided by private individuals, nonprofit organizations, and businesses attracted some two billion visits annually. Three-fifths of these visits were made to commercial profit making enterprises.

While this early study of recreation participation by 17,342 households in 1960, and later followed up by personal interview surveys of 4,029 randomly selected households in 1972 have been the most widely used and quoted resource information in the recreation and park field, it may now be outdated as more sophisticated and accurate data have been accumulated by such private organizations as A.C. Nielsen studies, which will be discussed later.

Another assessment of private outdoor recreation enterprises was done for the Bureau of Outdoor Recreation in 1965, covering privately owned and operated enterprises in the continental United States which were in existence in the summer of 1965 (Chilton 1966). The inventory was assessed on the basis of a stratified random sample by counties and geographic locations within counties. Outdoor recreation enterprises were identified in pre-selected portions of randomly selected counties and total sample size of 2,102 was investigated. Facilities offering the following activities were inventoried: bicycling; boating and boat rentals; camping -- for instance tent, trailer, group residence, and day; caves; drama and concerts; drive-in movies; driving and sightseeing; lodging; mountain climbing; nature study; picnicking; shooting ranges; skiing -- water and snow; field trails; fishing, salt, cold and warm fresh water; golf; hiking and walking; horseback riding; hunting -- big and small game and waterfowl; ice skating; spectator sports; sports and play fields -- such as archery, tennis or softball; swimming beaches and pools; vacation farms; winter sports.

[1] Paper presented at the National Outdoor Recreation Trends Symposium, Durham NH, April 20-23, 1980.

[2] Former Director, Missouri State Parks Jefferson City, MO

Because of the small sample size such an assessment can only be an estimate and can vary as much as 7000 enterprises (one standard deviation of sampling tolerance) in the total numbers projected. However this was the first attempt by anyone to project an estimated number of enterprises and the study does not purport to be 100 percent accurate.

Table 1.--Private outdoor recreation enterprises

	Number	Percent
Multiple water-oriented enterprises	7,856	6
Swimming	22,195	17
Boating	4,449	3
Fishing	10,138	8
total water-oriented	(44,638)	(34)
Multiple land-oriented enterprises	8,128	6
Lodgings	17,577	13
Camping(overnight and day)	6,273	5
Hunting	13,651	10
Active participation games or activities	25,991	20
Passive spectator and miscellaneous	15,591	12
total land-oriented	(87,211)	(66)
Total number of enterprises investigated	131,849	100

It can readily be seen that the assessment is far from complete, and many of the wide range of activities and facilities that were surveyed do not contain complete information; however, it was a beginning and called attention to the magnitude of this aspect of the recreation estate.

A further effort to assess the public and private recreation estate was done by the Bureau of Outdoor Recreation in its "Outdoor Recreation, A Legacy for America" in 1973. That report indicated that at the time the private sector owned or operated as much acreage as the public sector and involved more people and much wider variety of organizations and interests as well as activities. More than 50 percent of all recreation opportunities are directly attributed to the private sector.

A quick review of these supply data on recreation enterprises will suggest three major categories. (a) Commercial, (b) Private Membership, (c) Private - nonprofit, open to the public. A comparison of these holdings and enterprises in relation to public areas is shown in Table 2.

Table 2.--Number, acreage, and one year's attendance of public and private outdoor recreation areas

	Sites	Acres	Attendance
	number	------thousands-----	
Federal	2,127	446,616	537,065
State	18,614	39,701	420,468
County	4,048	2,977	194,317
Municipal	40,030	2,004	1,562,101
Total public	65,219	491,298	2,713,951
Private(profit)	131,626	30,025	1,251,876
Private (nonprofit)	1,000,000	467,000	800,000

An estimated 85,000 commercial enterprises on 131,000 sites with over 30 million acres provided over one billion outdoor recreation opportunities. These range from dude ranches, and resorts to hunting guides, and outfitting services, charter fishing boats, golf courses, shooting preserves and commercial campgrounds. Another 2000 enterprises provide outdoor recreation facilities and services relating to amusement and spectator sports activities.

More than one million individual enterprises provided outdoor recreation opportunities to the American people without a profit motive. It is estimated that they control over 467 million acres of land, and receive about 800 million visits a year. Of this number there were at the time of the study an estimated 47,000 private and quasi-private nonprofit organizations and an estimated 32,000 membership clubs in this group.

NATIONAL ASSOCIATION OF CONSERVATION DISTRICTS' STUDY

In 1973 the BOR initiated a program to inventory all of the private recreation businesses in the U.S. Cooperation was obtained from the National Association of Conservation Districts. The Association requested the assistance of the Soil and Water Conservation Service through their county Conservationists which cover over 96 percent of the nation's area, through 29,000 soil conservation districts. The local district conservationists enlisted the help of the state departments of conservation, extension specialists and others to inventory and categorize each outdoor recreation enterprise in each county.

Table 3.--National Association of Conservation Districts private sector recreation inventory--number of enterprises

Enterprises	Profit	Non-profit	Total
Campgrounds	11,619	6,087	17,706
Field sports	742	2,805	3,547
Fishing waters	6,931	2,892	9,823
Golfing facilities	5,395	3,765	9,160
Historical/Archaeo-logical site	351	938	1,289
Hunting areas	2,231	3,861	6,092
Natural scenic	346	838	1,184
Picnic areas	528	1,277	1,805
Race tracks	998	243	1,241
Recreation	5,550	306	5,856
Rockhounding	85	17	102
Rodeo,zoo,amusements	2,469	894	3,363
Shooting preserves	793	1,192	1,985
Snow ski areas	510	105	615
Trails	2,103	672	2,775
Vacation farms	909	65	974
Water sports	7,697	2,729	10,426
	49,251	28,686	77,943

Number of states included=47

The Soil Conservation Service had previously been involved in efforts to assess the private recreation potential in the various counties in the nation. In 1962 the initial portion of a three phase plan was begun. Each county was to be inventoried concerning the private recreation enterprise in that county. Because of lack of emphasis by some states the inventory was never completed or published.

In 1970 additional efforts were made to complete the inventory and to do a county-by-county assessment of the potential for private outdoor recreation development to provide a tool for potential areas or sites for recreation business, a very noteworthy purpose. However this study has not yet been completed either, and few know of its existence. It is unfortunate that such efforts, although well-intended and adequately conceived, have not received sufficient emphasis or priority from top administrators to result in their completion.

A comparison of the total number of enterprises reflected in the 1965 BOR inventory and the totals above from the NACD study show some differences. There is no question that the NACD figures are by far the most accurate because of the total inventory attempted, and because of the limitations of the 1965 BOR study previously mentioned.

Table 4.--National Association of Conservation Districts, private sector recreation inventory--types of activities offered by enterprises

Activity	Number of Enterprises		
	Profit	Nonprofit	Total
Camping-canoe	213	99	312
Camping-day	829	1,108	1,937
Camping-pack	288	259	547
Camping-resident	2,413	2,094	4,507
Camping-transient	3,228	403	3,631
Camping-vacation	6,792	843	7,635
Archery	888	1,536	2,424
Shooting range	1,082	2,052	3,134
Tennis	1,756	2,332	4,088
Fish-ponds/lakes	7,256	3,721	10,977
Fishing enterprises	5,924	934	6,858
Golf-driving	1,783	780	2,563
Golf-executive	337	110	447
Golf-miniature	1,284	91	1,375
Golf-par 3	528	184	715
Golf regulations	3,538	2,903	6,441
Historical/ archeological	543	976	1,519
Hunting total area	2,616	3,636	6,252
Hunting	4,123	5,600	9,723
Natural scenic	1,273	1,219	2,492
Picnicking	2,777	6,321	9,908
Racing-viewing	1,131	179	1,310
Recreation resort	3,047	164	3,211
Rockhounding	234	52	286
Rodeo,zoo,park	2,511	956	3,467
Shooting-preserve	506	934	1,440
Snow skiing	1,212	275	1,487
Trails total	3,317	1,812	5,129
Bicycle trails	549	182	731
Hiking trails	2,650	2,248	4,898
Horse trails	3,002	583	3,540
Off-road vehicles	472	161	633
Snowmobiling	821	460	1,281
Vacation farm	561	8	569
Vacation ranch	430	16	446
Boating-nonmotor	5,344	1,126	6,470
Boating-motor	4,665	339	5,004
Boating-launch, storage	10,479	2,163	12,642
Swimming	11,251	6,883	18,084

An example of an individual state inventory as part of the NACD study is given for later comparisons with other inventories yet to be discussed.

Table 5.--NACD Private Sector Recreation Inventory, state summary of enterprises Missouri

Primary Facility	Profit	Non-Profit	Total
Campground	343	185	528
Field sports	30	54	84
Fishing waters	467	76	543
Golfing fac.	128	143	271
Hist/Arch site	26	44	70
Hunting areas	37	130	167
Natural scenic	22	15	37
Picnic areas	13	39	52
Race track	35	31	66
Recreation res	429	7	436
Rockhounding	2		2
Rodeo,zoo,amus	118	68	186
Shooting pres	9		9
Trails	41	18	59
Vacation farms	3		3
Water sports	197	74	271
State totals	1,900	884	2,784

STANDARD INDUSTRIAL CLASSIFICATION SYSTEM(SIC)

The U.S. Department of Commerce and the Bureau of Census have produced a much overlooked source of valuable information relating to categories of recreation supply. Information is given on a number of categories of enterprises, total number of establishments, and total number of employees. These categories include: hotels, motels, tourist camps; trailer parks; sporting and recreational camps; motion pictures and services; cultural events; bowling alleys, billiards, pool establishments; other amusements such as dance halls; commercial sports, baseball, football, etc.; racetrack operations; golf courses; skating rinks; amusement parks; carnivals, circuses; other commercial recreation and amusements.

In most cases however, quasi-public agencies are not included. It also can readily be seen that many of the categories do not lend themselves to strictly outdoor recreation facilities, nor to categories consistent with other agencies or organizations interested in trend data.

THE PRIVATE OUTDOOR RECREATION ESTATE STUDY

A report submitted to the Heritage Conservation and Recreation Service (previously BOR) for the Nationwide Outdoor Recreation Plan in August, 1978 by Cordell, Legg and McLellan is probably the most comprehensive description of the private recreation estate for outdoor recreation to date. The study is actually a summary of three other studies done previously.

The first source of data in this study is the Nationwide Survey of Private Landowners and Managers (by the U.S. Forest Service and others, 1977). The survey was begun in late 1976 and samples non-corporate and corporate forest and range landowners concerning their land, the purposes and styles of management exercised, and the public recreational use policies in effect. The study focuses primarily on land use, and sheds little light on the numbers or purposes of the main commercial or private recreation enterprises for profit. It does however shed valuable light on areas that might be available in the future for recreation from private sources.

The second source of data in the study is the Inventory of Private Recreation facilities compiled in 1974-75 by the National Association of Conservation Districts, discussed previously. The data describe the developed recreation site opportunities provided by the private sector, by regions, according to the following classes of activities, and reports them in per capita supply and units per million population.

- Class I: high density facilities, such as swimming pools, golf courses, miniature golf, driving ranges, racetracks, zoos, parks and playgrounds.
- Class II: camping sites, shooting preserves and hunting areas, natural scenic areas, picnic tables, resorts, geological parks, snow skiing, trails, ORV areas, and vacation farms and ranches.
- Class III: water oriented sites and facilities.
- Class IV: historic sites.

The third source of data included in the study is a previous study of recreational properties, subdivisions, and vacation homes,[1] compiled by Richard Ragatz Associates, Inc.

While the summary study for HCRS does add a considerable amount of accurate data to the recreation supply, a valuable data on recreational land use, it still lacks much in answering the questions of trends for landowner use or numbers and types of private and commercial recreation enterprises which is so very much

[1] Ragatz, Richard L. Associates, Inc. 1977. Private seasonal recreational property development, unpublished report done for the U.S. Dept. Agric. For. Serv., Southeastern For. Exp. Stn., Clemson, S.C.

Table 6.--NACD Private Sector Recreation Inventory
Missouri state summary of activities and enterprises providing activities

Activity	Amount of measured units			Enterprise PROF	N/P	Total TOT
Special		•		16		16
Camping-canoe	473 areas			23	4	27
Camping-day	12652 acres	20149 guests		28	55	83
Camping-pack	79 areas			4	2	6
Camping-resident	9882 acres	11150 guests		27	58	85
Camping-transient	7450 acres	5835 veh-sites	19142 tent-sites	123	14	137
Camping-vacation	15741 acres	7227 veh-sites	6520 tent-sites	128	20	148
Archery	56 ranges	287 positions		16	27	43
Shooting range	879 positions			31	53	84
Tennis	363 courts			29	80	109
Fish-ponds/lakes	10467 acres	891 pond/lake		275	122	397
Fish enterprises	3234 acres	966 enterprises		208	6	214
Golf-driving	472 acres	924 positions		38	10	48
Golf-executive	428 acres	81 holes		4	3	7
Golf-miniature	124 acres	997 holes		51		51
Golf-par 3	97 acres	54 holes		4	1	5
Golf-regulation	17124 acres	2256 holes		67	113	180
Hist/Archeological	3091 acres	119 sites		32	41	73
Hunt total area	50744 acres			20	71	91
Hunting	25828 B/G-acres	28126 S/G-acres	13615 W/F-acres	59	132	191
Natural/scenic	13511 acres	15 road miles		33	30	63
Picnicking	4538 acres	5310 tables		194	113	307
Racing-viewing	2201 acres	131265 spectators	830 track miles	39	30	69
Rec resort	10143 acres	23505 guests		356	8	364
Rockhounding	7 acres	230 guests		1	1	2
Rodeo,zoo,park	8532 acres			132	69	201
Shooting-preserve	3361 acres			11	1	12
Snow skiing	40 acres	2700 pers/hr		1		1
Trails total	569 miles	•		44	32	76
Bicycling trail	19 miles	106 rentals		10	2	12
Hiking trails	449 miles			56	57	113
Horse trails	630 miles	1208 rentals	1209 boarded	73	21	94
Off-road veh	9304 acres	83 miles		7	3	10
Snowmobiling	10 acres	1 mile		1		1
Vacation-farm	3 acres	4 guests		1		1
Vacation-ranch	2785 acres	5092 guests		3		3
Boating-non motor	2201 canoes	44 sail	1378 other	294	26	320
Boating-motor	124 charter	2104 rentals		354	6	360
Boat launch/storage	3906 boats	578 ramps/lanes	5881 boat slips	490	23	513
Swimming	104807 beach lin.	12813 pond-acres	1088263 pool sq ft	411	171	582
				3694	1405	5099

Table 7.--Total number of SIC establishments, relating to outdoor recreation

SIC	Kind of Business	Total Number of Establishments 1954	1958	1963	1967	1972
793	Bowling alleys, billiard, pool establishments	12701	13916	15927	15497	14320
7932	Billiard and pool establishments	7639	7045	7069	xx	5847
7933	Bowling alleys	5062	6871	8858	xx	8454
79.Ex.792.3	Other amusement and recreation services	30532	42913	49244	52834	xx
791	Dance halls, studios, schools	2265	6869	7301	xx	xx
	Public dance halls or ballrooms	xx	875	869	xx	xx
	Dance schools, incl. childrens, pro.	xx	5994	6432	xx	xx
7941,7948	Commercial sports	2517	6028	6488	xx	xx
	Baseball, football clubs, etc., promoters	672	752	445	xx	xx
	baseball clubs	271	200	158	xx	xx
	football clubs	25	20	41	xx	xx
	other pro athletic clubs	376	448	246	xx	xx
	managers and promoters	376	448	246	xx	xx
7948	Racetrack operation, including racing stables	1845	5276	6043	xx	xx
	automobile racing	454	578	458	xx	xx
	dog race tracks	xx	xx	55	xx	xx
	thoroughbred horse race tracks	xx	xx	235	xx	xx
	standardbred horse race tracks	xx	xx	235	xx	xx
	dog and horse racing stables	xx	xx	5295	xx	xx
7942	Public golf courses	1014	851	1047	xx	xx
7945	Skating rinks	1799	2254	1274	xx	NA
7946	Amusement parks(incl. kiddie, theme parks)	2488	3682	997	xx	xx
7943	Coin operated amusement devices	6045	5264	5038	xx	xx
7949	Concession operators of amusement devices	xx	xx	2776	xx	xx
	carnivals, circuses	1090	801	363	xx	xx
	fairs	1090	320	1257	xx	xx
	other commercial recreation and amusements	13314	16844	22703	xx	xx

needed. It may however provide basic data on which to measure future trends.

STATE SCORP PLANS

Part of the requirements for states to be eligible for federal funds under the Land and Water Conservation Fund Act of 1965 requires that a State Outdoor Recreation Plan (SCORP) be done periodically by each state. A number of states have addressed this requirement differently; however in most cases, there is some private and commercial data available. Unfortunately there is little consistency between states on what was inventoried, or how it was inventoried, thus making state by state comparisons, or totals impossible from this source.

The SCORP for Missouri last done in 1975 included both a demand study as well as a supply inventory. The Missouri SCORP is discussed here only as an example of what may be found in other states and for later comparisons with other studies yet to be mentioned.

The Missouri SCORP did not isolate participation in private or commercial enterprises. The supply inventory however did include one "Type of Control" category shown in Table 10 as "other" which included facilities of the following agencies, organizations and institutions: church, civic, community, club, institution, employee organization, private or parochial school, private for profit, and private not for profit.

Unfortunately the following areas were not included: outdoor movie theatres, horse racetracks, miniature golf courses, auto racetracks, trampoline parks, go kart tracks, professional and semiprofessional football and baseball fields, and some university and college athletic facilities.

While the figures below may be meaningless in terms of comparison with other data, they are included for example purposes partially to show the need for consistent methodology to measure trends.

The inventory lists 1,608 agencies, businesses or institutions controlling 96,822 acres of recreational land. Apparently there was no effort to further scrutinize the data for additional information on private and commercial enterprises.

The 1979 SCORP for Missouri includes a more comprehensive inventory of public and private recreation opportunities.

Table 8.--Total acreage by type of control Missouri SCORP, 1975

	Number	Acres
Federal	170	1,744,490
State	719	455,613
County	96	11,642
Municipal	1162	38,500
School	1293	7,396
Other	1608	96,822

This reflects a more indepth effort to consider the facilities that are private/profit.

A summary of the figures from the three Missouri studies brings to focus the problems we have been discussing. While the 1979 SCORP does not have numbers of facilities, the data is available to retrieve such information and it may be included in the final document which is still in draft form.

Table 9.--Summary of enterprises

	Profit	Non-Profit	Acres	Total
NACD	1,900	885		2,784
1975 SCORP		1,608	96,822	1,608
1979 SCORP			214,568	

When compared with the NACD data, the differences are still significant; however, the methodology and accuracy are probably much more reliable in these two surveys than in the 1975 SCORP study.

SURVEY OF PRIVATE ASSOCIATIONS 1979

Realizing the inconsistency of data in government funded studies, whether nationwide or state by state, an attempt was made to contact a number of industry association groups for supply data. Those contacted fell into the following categories. (See Table 11.)

Questionnaires were sent to each of the agencies asking for any kind of participation or facility data that would indicate trends. A second letter was sent thirty days after the first to those who had not responded. Of the 133 questionnaires sent, responses were received from 40 and data was received from 19. While all of the agencies contacted do not relate to "outdoor recreation", they were included because of their close association to outdoor recreation and for other purposes not within the scope of this paper.

Table 10.--Statewide totals for each facility by type of ownership

Facility	Unit	Federal	State	County	Municipal	School	Other	Private Profit	Total
Total area	Acres	1,992,262	442,181	940,680	81,322	35,226	65,401	214,548	3,771,620
Water-lake	Acres	139,413	3,608,713	743	8,652	59	3,576	911,423	4,672,579
Water-wetland	Acres	55,016	7,328	0	23	3	35	3,288	65,693
Water-stream	Miles	61	6,397	2	3,331	0	2,688	3,638	16,117
Water-river	Miles	403	8,042	20	108	0	130	39,265	47,968
Marina (covered)	Spaces	3,374	249	454	422	6	196	6,737	11,438
Docks (uncovered)	Spaces	338	44	532	350	0	583	2,353	4,200
Access/boat ramps	Lanes	508	170	75	92	16	32	481	1,374
Fast boat	Acres	83,204	360	51	690	0	3,749	2,220	90,274
Slow boat	Acres	81,273	3,606	1,380	5,916	0	5,115	4,590	101,880
Water ski	Acres	126,190	360	65	645	0	3,749	2,300	133,309
Canoe/kayak/raft/tubing	Acres	153,690	1,750	470	3,284	41	4,492	5,883	170,215
Sailing	Acres	153,291	1,261	1,367	1,852	19	4,176	3,328	165,294
Pool unheated	Lighted	59,070	7,110	8,658	942,585	17,100	391,215	1,014,120	2,439,858
	No light	8,721	15,294	24,880	109,225	5,625	75,840	382,484	622,069
Pool heated	Lighted	1,253	0	20	32,823	78,320	53,383	191,928	357,727
Beach area	Acres	1,008	41	0	2	0	0	35	1,107
Regular golf course	Holes	0	18	36	495	72	388	1,161	2,170
Par 3 golf course	Holes	0	0	0	0	0	9	18	27
Driving range	Tees	0	0	0	20	35	136	448	639
Fishing docks/piers	Number	22	12	6	28	4	15	190	277
Rivers/streams-fishing	Miles	173	13,355	3	50	0	331	137	14,049
Rivers/streams-hunting	Miles	131	181	12	0	0	30	2	356
Lakes/impound-fishing	Acres	177,158	9,762	23,025	10,471	48	3,671	12,004	236,139
Lakes/impound-hunting	Acres	51,461	7,477	31	1,805	0	350	65,649	126,773
Ice fishing	Acres	500	2,047	62	1,655	0	1,534	241	6,039
Lands open to hunting	Acres	1,533,778	322,115	574	642	0	4,833	32,399	1,894,341
General sites	Sites	5,946	2,387	846	223	25	480	7,407	17,314
	Acres	931	6,080	810	922	9	324	905	9,981
Tent only	Sites	126	171	147	19	0	78	3,547	4,088
	Acres	5	40	0	20	0	9	115	189
Racquet-handball out	Lighted	0	4	0	11	26	9	3	53
	No light	0	0	4	37	52	7	0	100
Tennis courts/outdoor	Lighted	9	4	14	735	165	65	159	1,151
	No light	7	3	54	329	453	56	171	1,073
Basketball crt/outdoor	Lighted	1	0	1	110	88	18	9	227
	No light	0	5	19	220	1,100	75	58	1,477
Archery ranges outdoor	Points	15	158	167	68	114	100	15	637
Firearm-skeet/trap	Points	0	30	0	175	102	794	331	1,432
Firearm-pistol/rifle	Points	4	51	45	30	999	466	13	1,608
Hang gliding	Acres	1	0	0	1	3	1	8	14

Table 10.--continued

Facility	Unit	Federal	State	County	Municipal	School	Other	Private Profit	Total
Ballooning	Acres	0	0	0	0	0	1	10	11
Model plane	Acres	0	10	32	51	0	5	0	98
Desig. sites-sheltered	Tables	209	494	1,121	5,307	147	764	1,192	9,234
	Shelters	38	125	116	1,050	24	223	618	2,194
Desig. sites-unshelt.	Tables	900	2,595	3,020	5,711	939	1,754	3,452	18,371
	Acres	298	656	636	1,472	16	323	317	3,718
Sled/toboggan/tubing	Acres	3	40	6	338	23	112	53	575
Ice skating-natural	Acres	500	936	20	148	5	529	40	2,178
Ice skating-artificial	Acres	0	0	0	0	0	0	0	0
Ski slopes	Acres	0	1	0	0	0	0	5	6
Zoos	Acres	2	0	143	85	0	0	564	794
Wildlife view. areas	Sites	9	25	11	8	3	30	14	100
Interpretive center	Centers	16	10	8	11	1	12	7	65
Hist/Arch sites	Sites	8	40	52	144	3	26	11	284
Signed vistas	Number	11	18	5	28	0	2	1	65
Amphitheatre-developed	Seats	875	640	160	28,561	101	6,216	197	36,750
Springs-developed	Number	32	13	1	23	3	6	24	102
Caves-developed	Number	2	42	5	1	4	2	18	74
Horse arena/rodeo	Number	2	0	10	58	12	78	34	194
Fair grounds	Number	0	0	19	25	3	15	3	65
Camping	Acres	21	16,434	80	495	0	2,494	1,363	20,887
Picnicking	Acres	45,418	26,546	432	2,791	715	7,085	810	83,797
Hike/walk	Acres	157,966	98,046	1,172	3,893	751	11,109	8,264	281,201
Play area	Acres	15,108	543	1,391	5,370	1,654	3,434	376	27,876
Wildlife watching	Acres	128,804	99,900	2,552	2,067	163	15,148	12,675	261,309
Rock climb/rappelling	Acres	0	85	0	0	0	71	2	158
Trailer/camper	Sites	1,577	272	450	356	1,381	258	5,617	9,911
	Acres	1	0	0	1	0	0	94	96
Backpacking sites	Sites	49	2,148	0	0	0	26	0	2,223
	Acres	0	7,042	0	0	0	666	8,005	15,713
Group sites	Acres	199	42	129	129	30	297	50	876
	Number	2	12	79	48	0	69	32	242
Group camps	Number	0	33	65	38	0	314	24	474
Bicycle	Mi trail	0	2	15	55	1	4	2	79
	Mi lane	0	0	8,625	17	0	0	0	8,642
Horse	Miles	137	201	81	18	1	44	257	739
Hiking/foot/backpacking	Miles	247	284	156	55	10	182	258	1,192
Nature/interpret. walk	Miles	28	56	24	45	7	31	46	237
Nature/interpret. drive	Miles	0	62	12	13	0	12	4	103
Motorbike/motorcycle	Miles	2	100	2	14	1	10	50	179
	Acres	63,960	6,258	50	3	0	1	1	70,273

Table 10.--continued

Facility	Unit	Federal	State	County	Municipal	School	Other	Private Profit	Total
Fitness trails	Miles	0	3	9	12	18	1	14	57
Water based trail	Miles	4	0	0	3	0	3	20	30
Off road 2-wheel drive	Miles	0	108	0	3	2	25	54	192
Off road 4-wheel drive	Miles	0	45	0	0	0	20	30	95
	Acres	0	6,257	0	0	0	0	0	6,257
X-country ski/snowshoe	Miles	0	8	11	83	0	0	0	102
Snowmobile	Miles	0	0	2	0	0	0	20	22
Apparatus area	Acres	10,918	48	3	506	714	51	887	
Tot lot	Acres	10	6	0	19	5	9	7	
Multiple use courts	Lighted	12	13	2	112	6,085	37	59	6,320
	No light	0	20	2	210	18,488	45	36	18,801
Multiple use area	Acres	10,126	140	78	764	3,263	566	307	15,244
Baseball/softball field	Lighted	4	2	15	546	334	94	25	1,020
	No light	4	15	53	597	1,261	159	51	2,140
Football/soccer	Lighted	1	98	1	57	197	3	4	361
	No light	2	0	23	158	309	20	7	519

Table 11.--Industry Association survey

		Responses	Returned Trends
Amusements-fairs	9		
Back packing	1	1	1
Bicycle	9		
Billiards	1	1	
Boating	7	2	2
Bowling	5	2	1
Camping	6	3	
Campgrounds	5	1	
Canoeing	2	1	
Conventions	3		
Cultural	9	1	
Farm-dude ranch	3	1	
Golf	9	6	2
Hockey	1		
Hotels,motels,resorts	14	4	2
Motorcycles	3	2	
Planning	2	2	
Restaurant	4	1	1
Skating-roller	2	1	1
Skating-ice	1		
Skiing-water	1		
Skiing-snow	14	7	4
Snowmobiles	3	1	1
Swimming	1		
Tennis	7	2	2
Travel	11		
TOTALS	133	40	19

The response was disappointing to say the least. A majority of those who did return trend data only had information on a region or other fraction of the total industry itself. A problem with industry data is that it is industry produced. While the integrity of the various industries is not being questioned, the consistency of the reliability and validity leaves questions in the minds of many. The temptation may be too great for some. Several have their own outside funded foundations for education and research such as the golf and tennis foundations. Even in reporting the statistics these do not fully describe the methodology of their research.

PUBLIC SOURCES

Those desiring information on trends in private and commercial facilities and participation may be left to rely on occasional articles found in the news media, or those offered for a fee from private organizations. Several articles of note in recent times include the following:

Scherman, Tony, "The Thrill of It All," Family Weekly, November 11, 1979.

"Summertime and the Spending Is Easy," U.S. News and World Report, July 31, 1978, pages 16-17.

"How Americans Pursue Happiness," U.S. News and World Report, May 23, 1979, pages 60-76.

"Leisure Boom-Biggest Ever and Still Growing," U.S. News and World Report, April 17, 1972, page 42.

These furnish tidbits of information on participation, facilities, and spending of Americans on a variety of sports and leisure activities, although there appears not to be any consistency in the activities chosen.

The most comprehensive source of these isolated pieces of information on existing participation, spending and facilities is probably Epperson's book, "Private and Commercial Recreation" (1977) pages 74-80. However it too is a collection of statistics from a variety of sources, some of them highly questionable, and the data is now three years old.

Other limited sources have included studies done by government agencies but not published such as "The Importance of Recreation to the Economy" (Beaver 1978).

Data from private sources for a fee include the Travel Pulse, a research publication based on 5,000 indepth home interviews annually.

Another excellent source on sports and leisure participation in the private sector is the Nielsen studies. These have received very little attention in the public sector.

These studies are based on telephone interviews with some 3,000 households and representing over 8,500 individuals, and a study of thirty different sports. They provide trend and demographic information on individual participants as well as households and also include data on equipment purchases for most sports. They also include special tabulations covering a variety of topics for specific sports. Sports covered in the survey include: archery; baseball(hardball); basketball, indoor and outdoor; bicycling; boating; bowling; camping; fishing; football; golf; handball; hunting; ice hockey; ice skating; jogging/bicycling; motorbiking; paddle tennis; platform tennis; pool/billiards; raquetball; roller skating; sailing; snowmobiling; snow skiing; soccer; softball; swimming, indoor and outdoor; table tennis; tennis, indoor and outdoor; and water skiing.

Many sports equipment manufacturers and market analysts use the reports, available for a fee from the company. It appears that private enterprise has again accomplished something that public institutions have not.

SUMMARY

It is evident that there is no existing system or program either public or private that can track annual changes in private and commercial facilities or enterprises. There has been substantial growth in programs to track changes in participation of selected activities. However because this data has been produced by private enterprise, there is a substantial cost involved in obtaining the statistics. The economic feasibility will no doubt determine in the future which additional sports and activities are researched.

The only other alternative for the future, in terms of complete trend data, is to encourage the various industries themselves in groups to do so. This might be done through such organizations as the American Recreation Coalition, recently formed through the Discover America Travel Organization in response to gasoline allocations and possible rationing. This organization, a group of 48 agencies and industries relating to recreation, have met several times and perhaps could provide a vehicle for possible trend data collection. The limitations of industry produced statistics would still be present.

Another possibility is for the group such as the Travel and Tourism Industry Advisory Council, appointed by the Senate Committee on Commerce, Science and Transportation as an advisory arm to the Subcommittee on Merchant Marine and Tourism, to put this as a high priority item. While their first meeting was in July, and their agenda and minutes are not open to the public, there are a number of nationally known persons active in recreation, travel and tourism on the Committee.

It may be unlikely however that any governmental vehicle can be used to produce such a product because of the changing nature of politics, policies, regional differences in procedures and time required to accomplish the task. A recent effort at providing input into the National Recreation Plan for HCRS by a task force on private recreation is an example. Description of the problem is not important at this point, but those involved can attest to the problems with such studies and reports through traditional governmental agencies.

What is the answer? This author isn't sure. Perhaps this conference will help find some answers.

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