



PROCEEDINGS

1980 National Outdoor Recreation Trends Symposium

Volume II

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Recreation Working Group,
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University of New Hampshire,
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FOREWORD

Volume II of these proceedings contains a wide selection of papers presented at the 1980 Outdoor Recreation Trends Symposium. It includes, in addition to papers not available for Volume I, those papers presented during the keynote session, concurrent sessions, evening sessions, and the closing session. Concurrent session papers are clustered around four topics: Trend Measurement Methodologies; Trend Data for Recreation Planning; Industry Sources of Trend Data; and Applied Trend Research.

The closing-session papers provide considerable food for thought about future directions in outdoor recreation trend research. These two papers provide a balance between the need for trend measurement for professional purposes and in the limitations of trend measurement as a means for monitoring social change.

Throughout these proceedings it has been our purpose to promote, provoke, stimulate and, we hope, encourage the establishment of new and better data systems to monitor activity effectively in all sectors of outdoor recreation. We took this approach knowing there are certain inherent risks; not having an abundance of reliable trend indicators is often a politically expedient way of conducting the public's business in outdoor recreation. During an evening session in the

course of the symposium, a small group of participants chose to speculate on just what some of the risks might be if we were suddenly faced with a world where all of the necessary trend measurement systems were in place. The consensus was that a number of undesirable reactions could be readily predicted: rejection--or challenging the data because of inconsistencies and a lack of representivity; procrastination--a paralysis of programs while decision makers await the latest in a series of data; prostitution--the use of data to justify more public programs rather than use it for better planning; sanctification--the establishment and growth of specialized elite decision makers to monitor an increasing array of potentially relevant phenomena; and routinization--the complete reliance on data resulting in the disappearance of a risk-taking attitude on the part of those who are paid to make difficult decisions.

The positive aspects, we firmly believe, of better data, better planning, and better decisions easily outweigh all of these risks. But the risks are there, and as we move inevitably in the direction of greater government accountability, we need to be constantly alert to their emergence.

WILBUR F. LaPAGE, Chairman
Program Committee

THE 1980 NATIONAL
OUTDOOR RECREATION TRENDS SYMPOSIUM

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relative abundances of different vehicle types during the two years. Motorhomes and sedans showed significant decreases in relative abundance between 1977-78 and 1978-79 while pickups increased. Change in absolute numbers of different types of vehicles are shown in Table 3. Between the first and the second year, motorhomes decreased by 44%, sedans by 29%, 4-wheel drive vehicles by 18%, and other vehicles by 30%. Pickup numbers increased by 23%, despite an overall decrease of 16% in total recreational travel.

ciation, Birmingham, England. September 3-4, 1977.

TABLE 3: Change in numbers of recreational vehicles from 1977-78 to 1978-79

Type of Carrier	1977-78	1978-79	% Change
Sedans	4063	2871	-29
Pickups	2528	3098	+23
4-Wheel Drive	542	453	-18
Motorhome	1354	756	-44
Other	542	378	-30
Total	9029	7556	-16

A drop in the number of motorhomes is understandable in light of gasoline price changes. Motorhomes are typically much less gasoline efficient than other types of vehicles. The shift from sedans to pickups is less understandable. However, gas mileage of large sedans and pickups are comparable. Possibly the shift represents a movement away from vehicles with fairly limited usage to those which are more versatile in their use and utility.

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SNOWMOBILING IN THE 1980'S:

CONTINUED PROGRESS FOR A MATURE RECREATIONAL ACTIVITY¹

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In less than two decades, snowmobiling has changed from a novelty to a way of life for some 20,000,000 Canadian and American citizens of all ages. Why has snowmobiling continued to mushroom? Why did the challenges of inadequate safe use areas, public criticism and skepticism and primitive machines fail to doom the activity to a passing fad?

The answer is two-fold. First, through snowmobiling the unique grandeur of winter outdoors is unlocked for North Americans of all ages and of all levels of physical ability.

The second reason for the success of snowmobiling is "power through partnership". A unique array of imaginative and active individuals in government and industry, concerned enthusiasts and tourism officials together have made snowmobiling an integral part of the lifestyle of North American families.

In spite of poor snow in many areas, this past season has been a time of excitement for those connected with snowmobiling. New friends and supporters of the industry and sport appeared in high government posts, in the major media and in the tourism/leisure sector. This new positive face of snowmobiling stands in stark contrast to the image of the sport in the early 1970's.

A good part of this new image is the direct result of the snowmobile community's ongoing commitment to confronting and dispelling myths connected with the activity and speaking out publicly about snowmobiling and the people who enjoy it. The snowmobile story is being told at public hearings, on radio and television talk shows, in tourism campaigns, in newspaper and magazine articles, through letters to the editor and in face-to-face communications with elected and career government officials.

Today's new and quiet snowmobiles make complaints rare except for instances of operator misuse. As a result, snowmobile sound level concerns are yesterday's problem.

INDUSTRY SALES

The 1978-1979 winter was a notable successful selling season for the snowmobile industry, as retail sales of new snowmobiles climbed to 267,000 units, 18% above the level of the previous year. Key contributing factors included: a new mood of optimism among dealers following the successful 1977-1978 selling season (which saw a 16% sales increase over the winter of 1976-77), an exciting lineup of new snowmobiles in all price categories; good snow conditions in most areas of North America; steady improvements in snowmobile use opportunities; and new positive media treatment. The sales increase was most vigorous in the United States, which saw a 24% jump.

Unfortunately, our sales report for the selling season just concluded is not quite so rosy. Because of a record absence of snow in our prime marketing areas, our sales are below last year. I know this phenomenon of poor snow conditions is one our skiing friends would also like to see disappear forever. The long-term prognosis for snowmobiling is excellent, however.

As we look to a new decade of snowmobiling activity, the snowmobile industry expects that we will see outstanding opportunities. Demographic information and analysis of societal trends lead us to conclude that exciting, novel, flexible and outdoor recreational activities will experience continued growth in the 1980's. Latent interest in the sport participation in snowmobiling is likely to increase substantially over the next five years.

In fact, study after study demonstrates that snowmobiling activity has increased sharply. At the same time, the sport is experiencing a curious decline in visibility in

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

populated snowbelt regions. This reduced visibility of snowmobiles is not the result of decreased activity; rather, it is a consequence of a new trail networks which take snowmobilers to the scenic natural areas they seek and away from populated areas with potential environmental and social conflicts.

SNOWMOBILE TOURISM GROWS

Progress in expanding snowmobile tourism opportunities continues at a fast clip. A fine example of the new prevailing attitude towards winter tourism is found in the theme selected by Minnesota for its promotional campaign last season:

"If God meant for people to vacation in warm climates, why did He make winter in Minnesota so much fun?"

New promotional campaigns featuring snowmobiling are now being mounted in a large number of jurisdictions including Michigan, Manitoba, South Dakota, Minnesota, Pennsylvania, and by the Canadian Government Office of Tourism. The latter's campaign included full color advertisements placed in major North American magazines lengthy, well-written articles which have been picked up across the U.S. and Canada. One of the articles began:

"Canada is a snowmobiler's paradise. From coast to snowy coast, thousands of Canadians and winter visitors are hitting the trails, making this one of Canada's fastest growing sports."

THE FUTURE OF SNOWMOBILING

Two factors central to the long-term health of the snowmobile industry and sport are access to trails and other use areas; and availability of energy.

Land and Trails

If participation in snowmobiling is to increase in the 1980's at a continuing fast rate, all segments of the snowmobile community must continue to coordinate their efforts to expand opportunities for safe and fun outdoor winter activity. The snowmobile community has a stake in countless public land use planning activities as well as federal legislation on such issues as Wilderness. In the latter case, the snowmobile community finds itself, along with a myriad of other recreational groups, sorely neglected. Its interests lie neither with vocal commodity producers nor vocal preservationist interests, yet those two antagonists receive the prepon-

derance of attention from elected officials.

Providing land areas for snowmobiling is but the first step in meeting current and future snowmobiler needs. Just as important is the need to maintain and expand government programs to fund the construction and grooming of snowmobile trails and the construction and maintenance of parking areas, warming shelters, and other facilities that are essential to safe enjoyment of snowmobiling and the growth of the sport.

Acceptance of the desirability of snowmobile trails and responsibility for their creation and maintenance is now evident throughout government agencies in snowbelt North America. Slowly but surely, the traditional view that outdoor recreation ends with the coming of snow is being displaced by a sense that winter offers the opportunity to enjoy unique fun and beauty outdoors. This changed perspective will be extremely helpful over the next decade, and should boost the current total of 90,000 miles of marked and maintained public trails for snowmobilers across North America.

Without appropriate levels of funding, adequate, safe and enjoyable trails cannot exist. Without suitable funding, snowmobile program enforcement and youthful operator training programs cannot aid in assuring that the sport is safe for North American family members of all ages.

To support trail development and maintenance, the snowmobile community has been active in promoting the benefits of a good trails program paid for with snowmobiling-generated revenues. Organized snowmobilers have criticized governments for failing to protect the safety of citizens where there are insufficient safe, well maintained trails and applauded governments that build and groom safe use areas and trails. Tourism professionals with an interest in winter have added a "commercial interest" voice, urging trails and facilities to support their quest for winter tourist dollars. These efforts have worked exceedingly well in expanding spending for snowmobile trails during the past decade.

Yet tight government budgets in the coming decade will pose a challenge to all recreational activities, including snowmobiling. " earmarking" of funds -- especially snowmobile registration fees and gasoline taxes on snowmobile fuel -- will prove more difficult in the days ahead. Annual campaigns to maintain and boost snowmobile trail program budgets will be increasingly important in the 1980's.

One important factor greatly aiding the

expansion of snowmobile trails is the snowmobile itself. Today's snowmobiles are remarkably quiet -- operating at a level 94I below their counterparts of ten years before. New snowmobiles are certified independently as emitting no more than 78 dBA under a full-throttle acceleration test and no more than 73 dBA at a constant speed of 15 mph. But even those figures are deceptive. U.S. Forest Service researcher Robin Harrison, a mechanical engineer, reported recently:

"Snowmobiles almost always emit less noise under actual operating conditions than under certification conditions...even trying as hard as we could...we could not make any of the snowmobiles come up to 78 dB(A).

"...The results I have described, along with...other data, are incorporated in the noise pollution prediction method developed by the Forest Service...(U)nder the absolute stillest, most quiet background conditions that I have ever recorded, the method estimates that these new snowmobiles would be barely audible, to a very carefully listening listener, only a very small percentage of the time, at 3000 feet...Bear in mind that the ambient sound level I am describing is less than 20 dB(A)--an extremely unusual situation. Under the more usual conditions found in a wildland or outdoor recreation situation, with the ambient reading in the 30 dB(A) range, snowmobiles would probably not be detected beyond one-fourth of that distance...(U)nder conditions of a developed winter campground, which included some typical campground sounds...at distances beyond 400 feet, the snowmobile was only barely detectable above the normal campground noise."

Improvements in the machine go beyond sound levels. Today's snowmobiles are dependable, easy to operate and safe for family members of all ages. Virtually every major safety-related component meets a rigid voluntary standard. Moreover, an independent testing company provides the public with certification that these standards are met. Every snowmobile being produced for sale in North America is currently covered by this program.

Gasoline Availability

Also critical to the future of the sport of snowmobiling is the continued availability of gasoline to power the machines. Since 1973, the snowmobile community has fought for -- and succeeded to date in securing -- equitable treatment of snowmobiling in energy policy decisions.

Beginning with the Arab oil embargo in 1973, the need for snowmobile community vigil-

ance on energy issues has been made clear repeatedly. The U.S. House of Representatives considered a 20% excise tax on snowmobiles, boats and private aircraft in 1975 and rejected it. During the winter of 1978, the U.S. Congress contemplated imposing mandatory energy conservation measures on various vehicles used for recreation and chose not to do so. During 1979, the U.S. Congress considered and defeated a discriminatory gas rationing plan.

The next several years may bring similar misguided energy-related challenges to snowmobiling. In both Canada and the U.S., pressure will be exerted by the federal governments to force conservation of energy, especially gasoline. Pricing policies, allocation systems and perhaps even rationing programs will be utilized.

We feel quite confident that any proposals narrowly targeted at snowmobiling or other motorized recreation activities will be ultimately rejected both on grounds of fairness and on the political ramifications from a strong and unified snowmobiler community. Our belief is based upon the minuscule amount of gasoline used by each snowmobiler, and by all snowmobiles collectively.

The average snowmobile uses some .89 gallon per hour. The sport, collectively, consumes 12/100ths of 1% of all gasoline used in the United States. These consumption figures, based upon federal contractors' work, have been widely acknowledged. The Council on Environmental Quality published the report "Off Road Vehicles on Public Land" in May 1979. That report concluded:

"ORV and snowmobile use represents such a small fraction of the nation's energy consumption that even if they were entirely eliminated, the energy saved would probably not be worth the effort."

That conclusion was further reinforced on the floor of the U.S. Senate by fifteen Senators in a colloquy on snowmobiling last July. These Senators, Democrats and Republicans, from the east and from the west and representing all points on the ideological spectrum, pledged their efforts to assure fairness in federal policies affecting snowmobiling and to assure the availability of gasoline and the scenic natural areas on which the sport depends. A few quotes follow:

from the Honorable Max Baucus, U.S. Senator from Montana --

"When we start creating priorities among various users of energy, we run the risk of making serious mistakes...I simply pose the

question of what kind of a society would we have if we allowed no energy use for recreation? Either indoor or outdoor? I believe that recreation -- leisure time activity -- is very important to our form of society, to our mental and physical health. Therefore, when we plan for energy uses, I urge ample and due consideration to be given to the use of energy in recreation."

from the Honorable Jake Garn, U.S.
Senator from Utah --

"Whether it is the energy to allow a worker to get to his job, or to allow a Pennsylvania family to travel to the West by automobile to see our national parks, or the energy needed by snowmobilers to overcome the barriers of freezing temperatures and deep snow, we need to take the steps now which will assure its availability."

from the Honorable Donald Riegle, Jr.,
U.S. Senator from Michigan --

"Snowmobiles use very little gasoline, accounting for barely 12/100 of 1 percent of our national consumption. I don't think that anyone in the recreation industry would quarrel with the need to conserve fuel, and to restrict use during severe supply shortages, such as those that would trigger rationing. My point is that any rationing plan must be constructed in an equitable manner, so that all forms of travel are impacted in an equal fashion."

SUMMARY

Compared to its first two decades, snowmobiling's third decade should prove clearly positive and less volatile. As snowmobile trail networks continue to grow so, too, will the network of resorts and support facilities serving the snowmobiling public. Happily, evidence today suggests that actions by government, by snowmobiler associations, by governmental and private tourism organizations and by the snowmobile industry are well underway to continue to make snowmobiling a popular element of the North American winter recreational scene.

Moreover, by working with the nordic ski community, government officials at various levels, tourism interests and others, the snowmobile community believes it can help make winter outdoors more fun for Americans of all ages -- offering a safe, exciting and healthful alternative to sedentary, indoor winter lifestyles.

WOODALL PUBLISHING COMPANY, AN IMPORTANT

INDUSTRY SOURCE OF CAMPING INFORMATION¹

Curtis Fuller, Chairman of the Board
Woodall Publishing Company
Highland Park, IL

Paul Foght, Marketing Director
Woodall Publishing Company
Highland Park, IL

Linda Profaizer, Directory Publisher
Woodall Publishing Company
Highland Park, IL

Since 1967 the Woodall Publishing Company of Highland Park, Ill., has gathered annual statistics on privately owned campgrounds in the United States, Canada and Mexico and to a lesser extent on public campgrounds. At first the information gathered consisted of little more than hand tallies of the number of campgrounds by state and degree of development, of the number of campsites in the campgrounds and a breakdown of those campsites by number of electrical, water and sewer hookups available. It has since become much more detailed.

This information is gathered by on-site annual inspections of the privately owned campgrounds, by occasional inspection of public campgrounds and by annual mail questionnaires to all known public campgrounds. The inspectors are husband-wife teams who visit the privately owned campgrounds personally, rate the campgrounds and complete detailed descriptive listing forms.

The information thus gathered is placed in an editorial format and printed in the various editions of Woodall's campground directories. Woodall's began with 15 husband-wife field teams and today has 30 to 40 such teams. They are individually trained in the field and in week-long annual seminars.

Each year Woodall's inspects and rates 9,000 to 11,000 private campgrounds, inspects some publics, and gathers mail data on 4,500 to 6,000 more publics. Because the data is a by-product of the production of Woodall's campground directories every effort is made

to keep it as accurate and as reflective of trends as possible. Occasionally Woodall's receives criticism that the information is limited to the campgrounds listed. Woodall's response is that no other institution makes annual inspections of all campgrounds, even within a state. Obviously no such collection of data can be perfect, but it is believed to be the best possible to obtain from a practical viewpoint. It would be impossible to duplicate by mail surveys.

The Woodall data does not cover every U.S. private campground. It does not include those with fewer than 10 spaces but it does include mobile home parks which reserve five or more spaces for transients. It does not include campgrounds where Woodall representatives subjectively would not care to stay. It does not include campgrounds with filthy washrooms or dirty and littered campsites and grounds. Each year Woodall's deletes 500 to 1,000 campgrounds for various reasons.

When one considers Woodall's data -- or any data on campgrounds -- the first problem is one of definition. What is a campground? That is a difficult question and Woodall's has been wrestling with it for many years. Is it a lovely spot beside a lake or a river with a few designated sites and only a pump for water and outhouses for relief? Woodall's definitions state simply "yes, it can be," depending on the representative's report. Is it a paved RV park parking lot? Is it a lots-for-sale condominium resort? Is it a park filled with season leases? Is it a time-sharing resort? There are many questions and Woodall's currently defines a campground in rather general terms as follows:

"A campground is a camping area, usually

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

in a rural or natural setting, that accepts both tents and recreational vehicles. There may be little formal development."

"An RV park is a camping area that usually has devoted considerable attention to formal site development. It generally caters to RV's and their requirements. Often an RV park does not accept walk-ins or tents and sometimes does not accept tent trailers or other non-full hookup units."

From the first simple hand tallies of data beginning in 1967 Woodall's information has progressively become more detailed until today complete computer print-outs of information are available by state and nationally for the following information:

1. Comparative totals of private and public campgrounds by year, giving facility ratings and number of total campsites, and with tallies of electric, water and sewer hookups, number of campgrounds planned, and number under construction. This data has been gathered since 1967.

2. Since 1977 Woodall's has produced an annual computer count of total facilities in 113 categories by state and nationally in all private campgrounds. The data has not been collected long enough to provide meaningful trends.

3. Intermittently through the years, and most recently in 1977, 1978 and 1979, the base rates charged by private campgrounds have been compiled by state and nationally. This study has become progressively more complete through the years.

In addition to these ongoing studies, the company has from time to time hired private research firms to conduct studies of the RV industry and of campers both to provide marketing information and guidance for editorial policies. The company division that has sponsored these surveys is Woodall's Trailer & RV Travel, a leading RV camping magazine.

The history of market research at Woodall's encompasses five major studies conducted in 1969, 1973, 1978 and 1979. All of these studies were conducted for Woodall's by recognized market research firms using self-administered direct mail questionnaires, pre-tested by interviews, and mailed to randomly selected owners of recreation vehicles.

These efforts preceded by a series of interviews with recreation vehicle campers in five states conducted in 1967 for Woodall's by Dr. Bernard I. Loft of Indiana University.

Although Dr. Loft's sample was small, and

his procedure for selecting interviewees highly personalized, that study reached conclusions about the RV camping family which, although contrary to the conventional wisdom of the time, have only been further substantiated by our decade of structured studies computed with lots of weighted sums and standard deviations.

The conclusions about RV campers that have stood the test of time and statistical inquiry are:

Observation #1. RV campers are relatively affluent. In 1967, the individuals interviewed had median incomes of approximately \$9000 which compared to a median of \$8330 in 1966 for male professional and technical workers.

In 1979, subscribers to Woodall's RV TRAVEL Magazine have average household incomes of \$24,700 with 43% earning over \$25,000. At this point it should be noted that in 1969 and 1973 Woodall's studies involved panels of 6000 RV campers, 3000 selected from the subscription list of WOODALL'S RV TRAVEL Magazine and 3000 controls selected from state RV license registration lists. Except for the magazine subscribers having upscale demographic characteristics, these groups appeared so much alike that panels of 3000 magazine subscribers only were used for two 1978 studies and the 1979 study.

Observation #2. RV campers are mature. In 1967, the median age of Dr. Loft's interviewees was in the range 50 to 54. In 1979, WOODALL'S RV TRAVEL subscribers has a median age of 52.8, with 56% being between age 45 and 64.

Observation #3. Only half of RV campers travel with children. In 1967, the median number of persons camping in the groups interviewed by Dr. Loft was two. That number was still correct in 1979, and the young age of children who do sometimes camp with the RV owner strongly suggests that they are grandchildren of the RV owners.

Besides determining that the demographic character of the RV camper has been unchanging, Woodall's studies have been designed to predict purchasing intentions for RVs and RV accessories, and travel patterns. In this regard, the studies have demonstrated a high prediction value. In 1969, the shift from towed to motorized RVs was foreseen. In 1979, RV camper interest in smaller RVs was predicted. In 1979, our study also showed that the number of days of camping would remain essentially unchanged, but that distance traveled would be shorter. An interest in owning condominium campsites was measured at the 10% level in 1979, but it was also found

that owners of such campsites still tend to take a major vacation trip away from that proprietary location.

Still uncorroborated by other work is our 1979 effort to establish the lifestyle characteristics, or psychographics, of the RV owner. We found the RV camper to be more family oriented than average, and we found the family unit gets along better on camping trips -- both parent to child and husband to wife. We found RV campers to be outgoing people who like to come and go as they please. Many are seeking release from stressful occupations and seek an opportunity to do nothing. The RV camper was found to be practical minded and careful of how money is spent. This manifests itself in a consumer who is price sensitive, but not as the result of low income. Through choice, RV campers regard themselves as do-it-yourselfers. This trait is probably a manifestation of an independent lifestyle and a desire to be creative.

Because Woodall's demographic observations have been corroborated by the very significant consumer attitude studies being sponsored by the Recreation Vehicle Industry Association at the University of Michigan, we look forward to the time when they will also confirm our findings on these lifestyle characteristics.

Other obvious industry sources which have made important camping studies are A.C. Nielsen Company, the Gallup organization, Minnesota Mining & Manufacturing Company, and the Recreational Vehicle Industries Association. The latter organization publishes monthly reports of RV shipments by manufacturers in various categories and is reported to be planning to develop a reporting system for RV sales at a dealer level.

The consumer studies RVIA is currently funding through the University of Michigan may prove even more valuable than these efforts. In defining the characteristics of the RV owner, these studies have demonstrated that the RV family is most likely to be one that owns three or more motor vehicles. In examining the intentions of non-RV owning families to buy RVs, the study currently finds that the intention to buy is low, but the intention to rent an RV is very high, suggesting that there are still additional families planning to join the RV camping community.

All of Woodall's current data points to a reasonably healthy private campground industry at present, as contrasted with the state of RV manufacturing, which at this time is operating at less than half of 1978 volumes. Exhibit I charts a fairly constant gain in

private campgrounds between 1967 and 1973 when the country began to experience fuel difficulties. There was a slacking off in number of campsites added to the national inventory until 1976 when there was a rather dramatic rise through 1979.

Within this overall picture, the number of campgrounds that Woodall's believed worth inspecting and listing dropped overall from 9,591 to 8,016 (Table 1). The number of private campgrounds has varied by no more than 200 from a mean of 8,000 for the years 1975 through 1979. During the same five years, however, the number of campsites has continued to increase.

When Woodall's began its record-keeping for the 1967 calendar year, 267,424 campsites were found in private campgrounds. This was an average of only 27.88 sites per campground. That figure increased annually for the next 13 years and in 1979 averaged 96.57 campsites per campground. Since several studies have shown that only larger campgrounds can generally hope to be profitable, this trend can be expected to continue.

During this same 13-year period the number of full hookups in private campgrounds increased from 98,000 to 332,000, while the proportion of such hookups increased from 26.4% to 42.9%. The proportion of hookups with water and electricity also increased while the number of campsites without any hookups declined from 143,000 in 1968 to 107,241 in 1979. Percentagewise, 38.3% of private campsites had no hookups in 1968 while only 14.0% had no hookups in 1979.

The record clearly shows a dramatic increase in campground amenities, expansion and investment and a falling out of marginal campgrounds during the years studied.

The same trends can be shown for public campgrounds although the statistical record is more uneven. This unevenness may reflect Woodall's inability in all years to obtain equal responses from its mail questionnaires to the public campgrounds. Nonetheless, over the 13-year period in question, the total public campground inventory does not seem to have changed appreciably but the number of campsites has nearly doubled, from 177,000 to 339,374 (Table 2). During the same period the size of the average public campground increased from 30.99 campsites to 67.12 campsites.

The public campgrounds remain substantially less developed than the privates (Exhibit 2). In 1979 only 3.28% had full hookups compared with 42.9% for the private campgrounds; only 11.9% had water and elec-

EXHIBIT I. Changes in Inventory of U.S. Private Campgrounds, 1967-1979

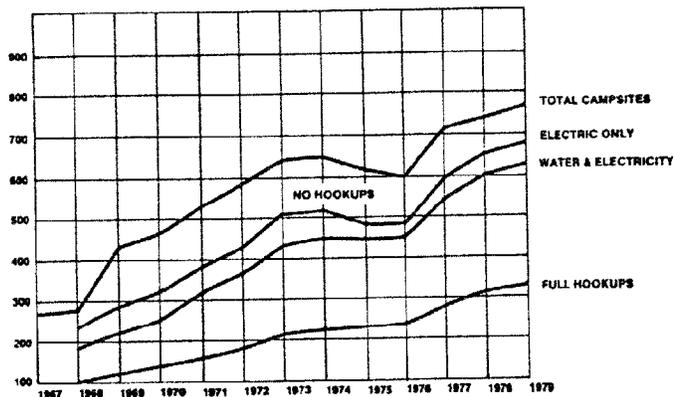


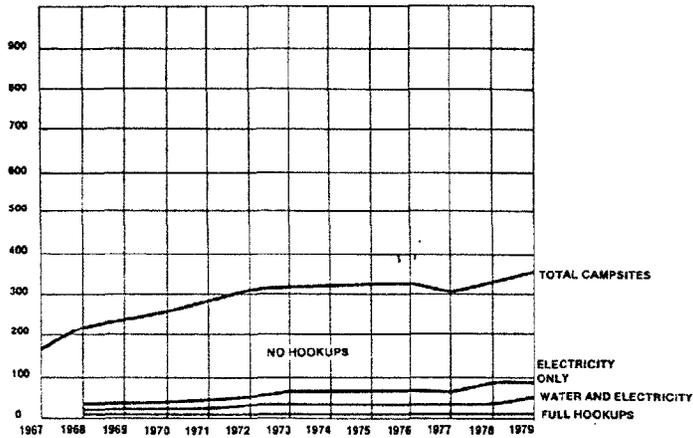
TABLE I. U.S. Private Campgrounds by Year 1967-79

YEAR	NUMBER OF CAMPSITES					NUMBER OF CAMPGROUNDS	AVERAGE NO. OF SITES PER CAMPGROUND
	Full Hookups	Water & Electricity	Electricity	No Hookups	Total Campsites		
1967					267,424	9,591	27.82
1968	98,410	177,713	229,904	142,984	372,888	9,520	39.17
1969	116,996	215,349	286,785	138,831	425,616	9,267	45.93
1970	127,297	250,951	318,707	143,679	462,386	9,513	48.61
1971	152,357	312,906	385,337	148,747	534,084	8,665	61.64
1972	178,429	358,658	429,299	154,380	583,679	9,190	63.51
1973	215,082	432,855	501,782	142,284	644,066	9,044	71.21
1974	227,195	454,152	512,900	130,253	643,153	8,685	74.05
1975	229,292	448,447	494,552	117,421	611,973	8,180	74.81
1976	232,941	449,211	492,261	107,707	599,968	7,864	76.29
1977	285,532	555,083	602,835	113,887	716,722	8,164	87.79
1978	313,995	601,263	649,084	103,770	752,854	8,202	91.79
1979	331,799	622,786	666,895	107,241	774,136	8,016	96.57

TABLE 2. U.S. Public Campgrounds by Year 1967-79

YEAR	NUMBER OF CAMPSITES					NUMBER OF CAMPGROUNDS	AVERAGE SITES PER CAMPGROUND
	Full Hookups	Water & Electricity	Electricity	No Hookups	Total Campsites		
1967					177,000	5,711	30.99
1968	4,607	10,257	32,004	173,450	205,454	6,626	31.00
1969	4,840	9,947	33,148	197,247	230,395	6,928	33.26
1970	4,720	10,269	33,402	214,070	247,472	7,566	32.71
1971	6,871	13,818	47,990	237,985	285,975	6,613	43.24
1972	7,943	24,008	58,821	247,238	306,059	6,463	47.36
1973	8,378	27,856	69,158	251,483	320,641	5,679	56.46
1974	8,642	29,490	74,570	247,103	321,673	5,439	59.14
1975	8,716	30,843	74,715	246,940	321,655	6,168	52.15
1976	9,158	33,564	77,973	254,924	332,897	5,792	57.48
1977	10,651	33,406	73,934	237,280	311,214	4,668	66.67
1978	10,308	38,097	84,142	244,877	329,019	4,991	65.92
1979	11,136	40,542	90,807	248,567	339,374	5,056	67.12

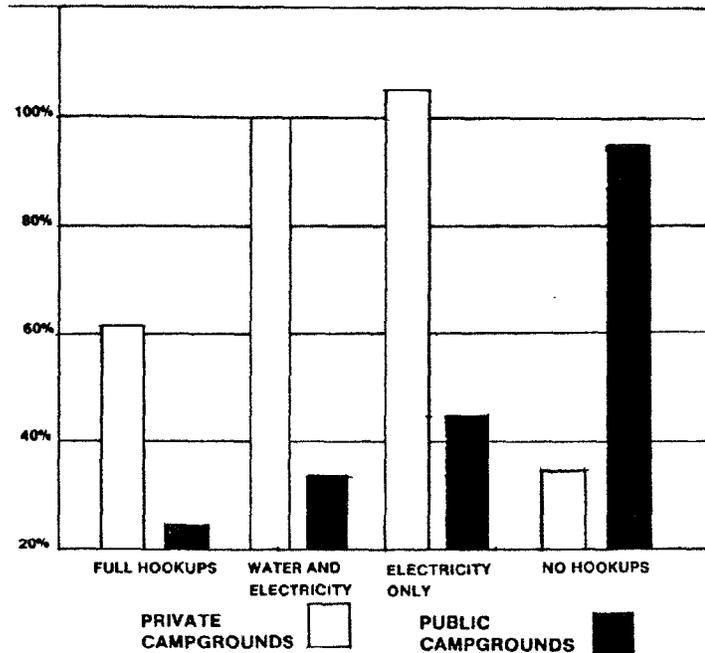
EXHIBIT 2. Changes in Inventory of U.S. Public Campgrounds, 1967-79



tricity, and only 26.8% had electricity. Since 73.2% of public campsites have no hookups of any kind it is obvious that they serve a somewhat different purpose or a different public than do the private campgrounds (Exhibit 3).

at the owner's request or represented duplicate directory listings. It is estimated that about a third of the latter group or about 5% to 6% of this group were deleted at the owner's request.

EXHIBIT 3. Comparison of Hookups in Private vs. Public Campgrounds, 1979



Woodall's has maintained records of the reasons for deleting campgrounds from its directory since 1969. During the 11-year period through 1979, the company deleted 10,129 private campgrounds from its directory listings--a remarkable indication of the volatility and turnover in this industry. It should be noted that the 10,129 figure is more than 2,000 higher than the total number of U.S. privately owned campgrounds listed in the company's directory today. These deletions by year are shown in Table 3.

Of the 1095 deleted in 1979, 47.4% or 519 were deleted because they had fewer than 10 spaces or were considered to be substandard. Another 57% or 625 were either out of business or were no longer able to accept new campers because they were full of permanent campers. The balance, 176 or 16.1%, were deleted either

TABLE 3. Deletions From Woodall's Campground Directory (1969 through 1979)

1969	957
1970	805
1971	643
1972	767
1973	1,294
1974	1,348
1975	1,004
1976	848
1977	497
1978	871
1979	1,095

The company has not made a definitive analysis of the reasons for the 10,000 deletions over the years but such study would undoubtedly provide significant information.

It has been apparent to most students of private campgrounds that it has not been a highly profitable industry. All studies made of the campground business have concluded that campground rates tend to be too low and that small campgrounds are unprofitable. For this reason Woodall's, as a publishing company serving all segments of the camping/RV industry, has taken the position that higher campground rates, by strengthening campgrounds, do at the same time strengthen all areas of the industry and make it more attractive to campers. Woodall's began to gather campground rate data in 1968 and has carried on interim studies from time to time, with annual studies being made since 1977.

To simplify its analysis of campground rates, the company adopted the system of recording base rates, even though the definition of base rate differs from campground to campground. The variation in methods for calculating rates varies so widely among campgrounds that any other approach would be unwieldy.

In 1968, Woodall's studied the base rates of 3,614 campgrounds and discovered that 1,911, or more than half, were charging \$2.00 or less as a daily fee; 1,159 were charging either \$2.25 or \$2.50; 439 were charging over \$3.00. By 1977 the mean base rate charged by campgrounds had increased to \$4.50 per night and in 1978 to \$5.00. In 1979 it was between \$5.00 and \$5.50 with the average base rate, assuming a one-night stay in every U.S. campground, standing at \$5.32. In 1979 38.7% of campgrounds had base rates of \$6.00 or more and 3.9% charged \$8.00 or more. The spread of 1979 rates is charted on Exhibit 4 and in the following Table 4.

In interpreting this data it should be remembered that there is no standard according to which base rates are charged. Some campgrounds have a basic charge for two persons, with extra charges for each additional person. Some do not charge for extra persons. Some have a basic charge for four. Some charge by the family. Others charge per person in the party. There are also varying extra charges for one, two or three hookups while some campgrounds include all hookups in their base charge. Woodall's has the data on these variations but has not attempted to analyze it except in general terms.

The third general area in which Woodall's directory division gathers data is to tabulate various facilities. These also are broken down by state and nationally. In 1979 Woodall's produced data on the recreational facilities of private campgrounds in 83 categories, including recreation halls, heated

pools, river swimming, canoe rentals, boat ramps, golf courses, handball courts, horse-riding trails, float trips, racquetball courts, snowmobiling trails and so on. Physical facilities in campgrounds were broken down into 48 categories. All this information is available but would be tedious to list here.

In summary, then, the Woodall Publishing Company has enormous amounts of digested, semi-digested and raw data on campgrounds which it is willing to make available to qualified industry sources and researchers. The computerized data in Woodall's files and in its campground directories represents the physical status of the private campground industry, and to a lesser extent of the public campground industry, on an annual basis.

Woodall's 1980 directories contain descriptions of 13,072 campgrounds and RV parks and nearly all of this information has been summarized in computer print-outs. In addition, similar data is available on 2,504 campgrounds and parks in Canada, Mexico, and Central America.

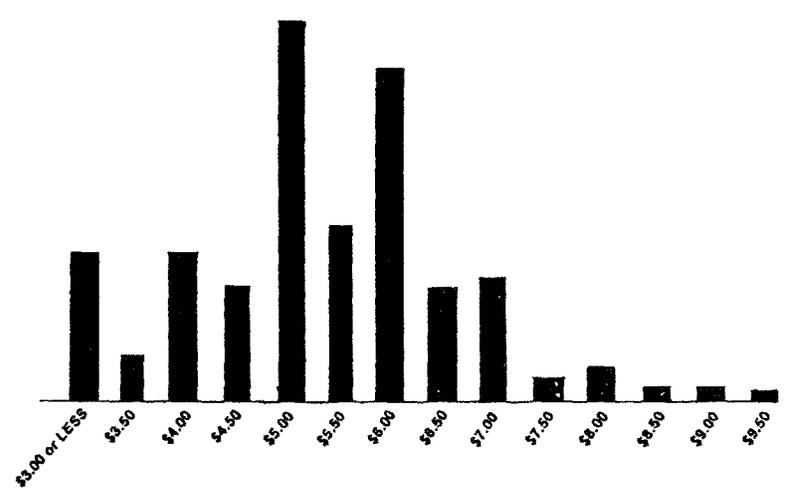
An additional 890 which were rejected in 1979 as not qualifying are in the file and the data for this is also available.

Table 4

BASE RATES CHARGED BY U.S. CAMPGROUNDS, 1979

<u>Base Rates</u>	<u>Number of Campgrounds</u>
\$3.00 or less	711
3.50	205
4.00	740
4.50	655
5.00	1,787
5.50	815
6.00	1,526
6.50	531
7.00	573
7.50	163
8.00	178
8.50	63
9.00	54
9.50	18
Total Reporting	8,019
Average: \$5.32	

Exhibit 4. Base Rates Charged by 8,019 U.S. Campgrounds, 1979



Appendix I

NUMBER OF CAMPSITES IN ALL STATES - 1969 vs. 1979

State	No. of Campsites in Private Campgrounds		No. of Campsites in Public Campgrounds		Total Campsites	
	1969	1979	1969	1979	1969	1979
Alabama	3,533	3,901	643	3,222	4,176	7,123
Alaska	1,588	1,605	1,727	1,944	3,315	3,549
Arizona	11,325	33,354	3,383	6,217	14,708	39,571
Arkansas	1,585	4,576	4,550	5,221	6,135	9,797
California	27,838	49,093	29,827	34,667	57,665	83,760
Colorado	8,776	16,543	6,798	9,241	15,574	25,784
Connecticut	2,711	7,799	1,837	1,414	4,548	9,213
Delaware	2,380	3,784	760	660	3,140	4,444
D.C.	-	-	-	-	-	-
Florida	33,194	74,967	4,039	6,483	37,233	81,450
Georgia	3,100	8,095	3,519	6,224	6,619	14,319
Hawaii	-	-	143	460	143	460
Idaho	5,220	5,578	3,219	2,776	8,439	8,354
Illinois	19,787	27,242	7,345	11,462	27,132	38,704
Indiana	19,039	25,313	4,846	10,798	23,885	36,111
Iowa	4,308	6,849	4,644	13,434	8,952	20,283
Kansas	1,732	2,838	956	7,980	2,688	10,818
Kentucky	4,913	12,824	2,680	6,942	7,593	19,766
Louisiana	1,982	7,267	518	1,500	2,500	8,767
Maine	12,789	17,769	1,759	1,734	14,548	19,503
Maryland	3,169	5,678	1,213	2,791	4,382	8,469
Massachusetts	6,703	13,218	2,783	3,323	9,486	16,541
Michigan	12,507	31,524	20,982	25,384	33,489	56,908
Minnesota	11,994	14,744	5,179	7,817	17,173	22,561
Mississippi	1,050	2,311	2,398	3,127	3,448	5,438
Missouri	3,987	15,408	4,383	8,319	8,370	23,727
Montana	5,347	8,996	3,402	6,048	8,749	15,044
Nebraska	2,652	2,535	3,034	6,410	5,686	8,945
Nevada	2,280	5,860	2,050	1,882	4,330	7,742
New Hampshire	7,378	14,444	2,012	2,071	9,390	16,515
New Jersey	8,267	22,972	1,101	1,090	9,368	24,062
New Mexico	2,463	5,368	1,222	2,324	3,685	7,692
New York	23,496	40,318	10,298	14,623	33,794	54,941
North Carolina	13,341	19,356	3,713	4,186	17,054	23,542
North Dakota	802	1,303	1,761	3,792	2,563	5,095
Ohio	27,515	42,564	7,540	12,899	36,055	55,463
Oklahoma	1,297	2,698	7,323	9,241	8,620	11,939
Oregon	7,503	9,889	11,113	13,901	18,616	23,790
Pennsylvania	20,234	38,507	3,981	9,567	24,215	48,074
Rhode Island	949	3,109	818	1,182	1,767	4,291
South Carolina	10,392	15,446	1,193	3,218	11,585	18,664
South Dakota	5,909	6,802	3,506	3,786	9,415	10,588
Tennessee	6,255	13,017	4,184	4,759	10,439	17,777
Texas	8,479	40,698	5,246	13,200	13,725	53,898
Utah	2,615	6,843	3,994	4,481	6,609	11,324
Vermont	3,390	5,356	2,072	2,249	5,462	7,605
Virginia	15,838	20,669	5,124	4,944	20,962	25,613
Washington	14,435	15,130	10,060	9,702	24,323	24,832
West Virginia	1,307	3,681	1,113	2,680	2,420	6,361
Wisconsin	21,293	30,546	9,950	12,253	31,243	42,799
Wyoming	5,969	5,749	4,426	5,746	10,395	11,495
U.S.A. Totals	425,616	774,136	230,395	339,374	656,011	1,113,510

Woodall base rate survey by states

Base Rates	Base Rates												Total Reporting	Not Available	Total Campgrounds	Mean Base Rate				
	\$2.00	\$2.50	\$3.00	\$3.50	\$4.00	\$4.50	\$5.00	\$5.50	\$6.00	\$6.50	\$7.00	\$7.50								
Alabama	4	1	7	4	16	5	12	0	5	0	1	0	0	0	0	0	57	0	57	5.00
Arizona	28	7	18	15	25	19	54	23	27	9	10	5	3	0	0	0	256	0	256	5.80
Arkansas	7	1	15	8	25	7	14	4	10	3	1	0	0	0	0	0	83	0	83	5.00
California	46	8	21	17	197	30	140	89	78	29	39	17	11	8	0	0	1571	0	1571	5.30
Colorado	7	4	18	24	50	27	41	30	16	5	3	0	0	0	0	0	217	0	217	5.00
Connecticut	3	1	3	1	12	1	14	8	8	2	6	0	0	0	0	0	63	0	63	5.30
Delaware	0	7	0	4	9	3	2	0	1	1	1	0	0	0	0	0	18	0	18	5.30
Florida	187	1	5	2	45	22	54	28	38	17	16	8	6	4	0	0	451	0	451	5.00
Georgia	6	2	10	13	20	10	18	10	6	1	2	0	1	0	0	0	89	0	89	5.00
Idaho	7	2	11	7	29	12	21	12	1	1	1	0	0	0	0	0	117	0	117	5.00
Illinois	13	2	22	12	26	20	26	15	14	4	3	0	0	0	0	0	178	0	178	5.00
Indiana	21	4	28	24	32	14	24	12	4	0	0	0	0	0	0	0	146	0	146	5.00
Iowa	6	2	9	12	17	7	11	2	0	0	1	0	0	0	0	0	69	0	69	5.00
Kansas	3	2	3	7	14	8	7	3	0	1	0	0	0	0	0	0	52	0	52	5.00
Kentucky	8	2	9	9	17	10	10	5	2	0	0	1	0	0	0	0	71	0	71	5.00
Louisiana	6	2	8	4	17	5	15	7	6	4	4	0	1	0	0	0	80	0	80	5.00
Maine	6	2	15	19	29	20	37	14	28	5	2	1	0	1	0	0	188	0	188	5.00
Maryland	2	1	2	3	10	9	10	3	4	2	0	1	0	0	0	0	48	0	48	5.00
Massachusetts	2	1	4	1	20	9	27	7	17	0	2	1	2	0	0	0	105	0	105	5.00
Michigan	22	5	30	29	78	43	72	30	25	7	6	2	4	2	0	0	352	0	352	5.50
Minnesota	6	3	11	24	81	35	48	18	19	3	0	1	0	0	0	0	289	0	289	5.00
Mississippi	5	2	3	4	15	3	5	1	2	1	4	0	0	0	0	0	45	0	45	5.00
Missouri	14	17	26	27	37	23	23	8	8	2	1	0	0	1	0	0	219	0	219	5.00
Montana	7	8	23	21	38	18	21	7	8	2	1	0	0	0	0	0	153	0	153	5.00
Nebraska	4	1	6	5	10	3	10	1	1	0	0	0	0	0	0	0	44	0	44	5.00
Nevada	11	2	3	2	14	3	10	5	12	1	3	3	0	0	0	0	69	0	69	5.00
New Hampshire	2	0	13	9	25	25	44	13	13	3	2	0	0	0	0	0	159	0	159	5.00
New Jersey	6	0	1	2	12	12	24	10	23	3	8	3	3	3	0	0	111	0	111	5.50
New Mexico	6	3	7	10	17	10	26	10	6	1	2	0	0	0	0	0	98	0	98	5.00
New York	28	10	36	43	88	47	85	34	24	7	9	1	4	0	0	0	385	0	385	5.00
North Carolina	10	3	18	13	52	28	82	12	20	3	7	2	0	0	0	0	230	0	230	5.60
North Dakota	4	2	4	7	2	3	1	0	0	0	0	0	0	0	0	0	23	0	23	4.80
Ohio	17	5	20	31	89	31	52	20	14	1	1	0	2	0	0	0	268	0	268	5.00
Oklahoma	7	2	8	3	16	3	8	3	3	1	0	0	0	0	0	0	58	0	58	5.00
Oregon	13	7	26	14	50	16	53	10	8	2	1	0	0	0	0	0	203	0	203	5.00
Pennsylvania	12	19	41	40	80	34	57	17	23	3	5	4	8	0	0	0	335	0	335	5.00
Rhode Island	0	1	2	1	8	3	4	2	1	0	2	0	0	0	0	0	24	0	24	5.00
South Carolina	8	0	8	3	14	8	9	5	9	3	2	1	1	0	0	0	71	0	71	5.00
South Dakota	4	2	10	9	22	10	18	5	1	0	1	0	0	0	0	0	89	0	89	5.00
Tennessee	11	3	11	16	42	9	29	7	12	3	2	1	1	0	0	0	142	0	142	5.00
Texas	45	19	42	47	149	65	194	32	18	14	8	3	2	9	0	0	550	0	550	5.00
Utah	4	2	7	4	16	12	27	3	7	1	0	1	0	2	0	0	96	0	96	5.00
Vermont	8	5	8	13	29	7	8	2	1	0	1	1	1	0	0	0	77	0	77	5.00
Virginia	8	0	7	19	24	15	47	24	15	5	2	2	0	0	0	0	180	0	180	5.00
Washington	20	2	40	27	82	31	45	11	14	3	8	2	2	0	0	0	290	0	290	5.00
West Virginia	7	5	15	5	9	3	4	2	4	0	0	0	0	0	0	0	54	0	54	4.50
Wisconsin	20	12	28	45	11	50	36	22	8	6	3	1	2	1	0	0	351	0	351	5.00
Wyoming	8	2	5	5	14	14	23	4	11	0	2	0	0	0	0	0	69	0	69	5.00

* No data available from Alaska
 Central America reported 17 campgrounds, but no base rate data
 Alaska reported 33 campgrounds, but no base rate data
 No data available from Northwest Territories.
 Data gathered in 1979 for the 1980 Woodall's Campground Directory

Appendix 3

1979 U.S. FACILITIES DATA,
BOTH RECREATIONAL AND PHYSICAL FACILITIES

<u>FACILITIES</u>	<u>Number of Parks</u>
Total sites	858,372
Total with full hookups	366,841
Total with elec & water hookups	317,746
Total with electric hookups	49,916
Total with no hookups sites	118,705

Number of Parks:

With season lease sites	3,100
With pull-chrus	4,656
With cable TV	429
With RV length of less than 33 feet	954
That accept full hookup units only	756
That exclude tents	966
That exclude tent trailers	146
That exclude motorhomes	6
That exclude vans	37
That exclude pickup campers	11
That exclude fifth wheel	16
That exclude travel trailers	13
That exclude motorcycles	1,095
With flush toilets	8,297
With chemical toilets	193
With pit toilets	856
With marine/recirculating toilets	53
With hot showers	8,242
That charge for hot showers	1,192
With cold showers	36
With basins	8,334
With dump station	0
That charge for dump station	0
With dump facility	6,035
With portable dump	438
With a laundry	5,367
With public phone	5,899
With phone available	2,788
With limited grocery	2,736
With grocery	1,424
With full service store	313
With RV supplies	2,024
With LP gas refill	2,527
With gasoline	1,199
With marine gas	543
With ice	6,025
With picnic tables	7,199
With patios	1,303
With fire areas	1,512
With bowling lanes	3
With pony rides	55
With playground	4,160
With handball courts	20
With horseriding trails	217
With horseriding rentals	199

With fire rings	2,506
With grills	1,496
With wood	3,964
With babysitting service	281
With church services	822
With recreation halls	2,356
With recreation halls for teens	98
With recreation halls for adults	216
With recreation rooms	3,170
With recreation rooms for teens	157
With recreational rooms for adults	114
With pavilions	1,297
With pavilions for teens	6
With pavilions for adults	10
With swimming pool	5,290
With more than 1 swimming pool	181
With indoor pools	65
With outdoor pools	0
With heated pools	1,171
That charge for swimming	191
With lake swimming	1,511
With ocean swimming	152
With river swimming	384
With pond swimming	349
With a sauna	103
With therapy pool	275
With water slides	100
With boating	2,608
With electric motors only	146
With no motors	432
With motorized launch	28
With boat ramp	1,486
With boat dock	1,526
With row boat rentals	1,560
With sail boat rentals	66
With canoe rentals	817
With pedal boat rentals	508
With ocean fishing	262
With lake fishing	2,146
With river fishing	1,362
With pond fishing	943
That charge for fishing	217
With 9-hole golf	29
That charge for 9-hole golf	25
With 18-hole golf	15
That charge for 18-hole golf	16
With par-3 golf	28
That charge for par-3 golf	15
With mini-golf	539
With driving range	36
With putting greens	48
With basketball courts	400
With more than one basketball court	83
With bike rentals	450
With ice skating rinks	15
With planned group activities	1,239
With a recreation director	325
With platform tennis	5
With racquet ball courts	8
With roller skating rink	20
With shuffleboard court	1,452
With tennis court	429
With more than 1 tennis court	330
With an archery range	54
With badminton	1,656

Number of Parks, Cont.

With batting cages	13
With croquet	274
With fishing guides	148
With float trips	121
With horseshoes	3,861
With motor bike trails	250
With nature hikes	894
With ski rentals	35
With cross country skiing	185
With downhill skiing	17
With scuba diving	50
With snowmobile trails	315
With snowmobile rentals	27
With volleyball	2,719
With water skiing	831
With local tours	230
With recreation open to non-camping public	1,023

RESTRICTIONS

Number of Parks:

That do not allow pets	307
Limited to adults only all year	440
Open all year	5,401
With 3 day minimum stay	5
With 7 day maximum stay	16

CBs

Number of Parks:

With CB channel monitored all year	0
With CB channel monitored 24 hours	0

CLASSIFICATION:

Number of campgrounds	6,078
Number of RV parks	1,019
Number of RV areas in a mobile home park	425
Number of RV spaces	1,901
Number of primitive campgrounds	61
Number of parks that require reservations	851
Number of planned & under construction parks	134
Number of rebuilding parks	51
Number of new parks	232

INDUSTRY SOURCES OF TREND DATA -- SKIING¹

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OVERVIEW

With precious few exceptions, ski industry trend data does not exist. This paper will enumerate sources of trend data known to the author. The paper considers the probable causes of the lack of ski industry trend data and means to ameliorate the lack of trend data. Finally, the paper presents a rationale for acquiring improved ski industry trend data.

SKI INDUSTRY TREND DATA

The National Ski Areas Association (NSAA) sponsors an annual research/survey study entitled "Economic Analysis of North American Ski Areas", which reports the financial condition and operating characteristics of more than 50% of the American ski area capacity.²

The US Forest Service maintains annual pricing, usage and capacity data³ on ski areas operating under special use permits. Although the capacity calculations have come under some criticism, the report does contain factual, unaggregated, area-specific skier visits and published ticket price information.

Periodically, the AC Nielsen Co.⁴ has reported on the ski industry either in the context of overall outdoor recreation activity, or as an industry specific project.

Many ski industries⁵ have supported or cooperated with researchers investigating their own skiers, resulting (in some cases) in annual skier "profiles".

Many recreation researchers⁶ have been active in ski industry analysis during the past several years. Although not necessarily sources of trend data *per se*, these researchers do have a historical perspective that could be invaluable resources for certain types of investigation.

A number of universities and colleges

have recreation or natural resources planning programs that either maintain bibliographic catalogues⁷ of ski industry studies, or actively publish and distribute industry specific monographs. Collectively, these monographs are a form of trend data.

PROBABLE CAUSE FOR THE LACK OF SKI INDUSTRY TREND DATA

The "supply side" of the ski industry is characterized by many relatively small "producers". No one supplier or group of suppliers dominates (in terms of market share) the supply of alpine skiing. Most ski areas are, by definition, "small businesses" and many are owned and operated as a family business.

Although there is some movement towards large corporate acquisitions (20th Century Fox, Ralston-Purina, etc.) and mergers between ski areas (Sugarbush and Glen Ellen, Stratton and Bromley, etc.) the vast majority of ski areas in North America are owned and operated by entrepreneurs. These entrepreneurs are generally good day-to-day managers, but many times lack the capital base for major expansion.

The larger areas conduct their own, albeit limited, demand research to satisfy marketing planning expansion requirements. Smaller areas rely heavily on the intuition of management and the extrapolation of past performance.

Thus the fragmented nature of the supply function, coupled with varying management priorities has not lead to the creation of a sophisticated on-going mandate for either supply or demand side trend data research. The exception may be a general support of the research by NSAA in its annual "Economic Analysis of North American Ski Areas".

AMELIORATION OF TREND DATA RESEARCH

As noted above, the NSAA "supply side" "Economic Analysis" presents a relatively comprehensive look at the ski industry over time. The primary improvement to this excellent resource would be broader industry participation. Perhaps this could be achieved by heavier promotional efforts or more persistent followup techniques.

The US Forest Service study noted above is helpful (although limited to those on Forest Service land) and could be improved by rationalizing the capacity component through more rigorous, uniform criteria and more comprehensive evaluative techniques.

Demand side trend research will require a "major" supporter to provide the continuing resources necessary to achieve the inherent objectives. Many vehicles are available inside and outside the industry. The absence of demand trend data is clear; the necessity is stated below.

RATIONALE (NECESSITY) FOR IMPROVED SKI INDUSTRY TREND DATA

Significant public and private capital and human resources are employed in delivering the recreational activity focused on snow skiing. To the extent we wish to maximize the return on capital and labor, we need to know how to create the desired product or products. Or, expressed from the perspective of the skier, "Who will offer what I want, when I want it, at a price that I feel is reasonable?" It is this arbitrage between knowledgeable suppliers and knowledgeable consumers (whether active, potential, or drop-out) that will result in a healthier, more vigorous, socially useful industry.

FOOTNOTES

¹ Paper presented at the National Outdoor Recreation Trends Symposium, Durham NH, April 4-23, 1980.

² ECONOMIC ANALYSIS OF NORTH AMERICAN SKI AREAS: 1977-78 SEASON. C.R. Goeldner and Ted Farwell. Business Research Division, Graduate School of Business Administration, University of Colorado, Boulder, CO. 1978. 140 pp. \$30.

³ US Forest Service Pricing Study Print-out. August 1979.

⁴ CONFIDENTIAL REPORT ON THE SPORT OF SNOW SKIING. Nielsen Custom Research Service,

AC Nielsen Co., Nielsen Plaza, Northbrook, IL. 1979.

⁵ THE ASPEN SKIER: 1977-78 SEASON. C.R. Goeldner, Business Research Division, University of Colorado, Campus os 420, Boulder, CO. 1978. 80 pp. \$15.

THE BRECKENRIDGE SKIER. C.R. Goeldner and Yvonne Sletta, Business Research Division, University of Colorado, Boulder, CO. 1975. 67 pp. \$10.

THE COLORADO SKIER: 1977-78 SEASON. C.R. Goeldner, Business Research Division, University of Colorado, Boulder, CO. 1978. 92 pp. \$25.

THE COPPER MOUNTAIN SKIER, 1978-79. C.R. Goeldner and Jack Harrington, Business Research Division, University of Colorado, Boulder, CO. July 1979. 68 pp.

THE 1977-78 STEAMBOAT SKIER SURVEY. Charles K. Mayfield, Steamboat LTV Recreation Development, Box 1178, Steamboat Spgs. CO. 1978. 88 pp.

THE VAIL SKIER: 1977-78 SEASON. C.R. Goeldner, Business Research Division, University of Colorado, Boulder, CO. 1978. 106 pp. \$15.

THE WINTER PARK SKIER: 1978-79 SEASON. C.R. Goeldner and Jack Harrington. Business Research Division, University of Colorado, Boulder, CO. June 1979. 49 pp.

⁶ BIBLIOGRAPHY OF SKIING STUDIES. C.R. Goeldner and Karen Dicke. Business Research Division, University of Colorado, Boulder, CO. 1978. 62 pp. \$10.

⁷ Ibid.

SKI UTAH: A REPORT OF THE INDUSTRY. John D. Hunt and Christie Anderson. Institute for Outdoor Recreation and Tourism, Utah State University, Logan, UT. February 1976. 111 pp. \$10.

WINTER RECREATION VISITOR STUDY, WISCONSIN. Rollin B. Cooper, Sue Sadowske, and Mark D. Kantor. Recreation Resources Center, University of Wisconsin-Extension, 1815 University Avenue, Madison, WI. 1979.

TRENDS IN PARTICIPATION SPORTS DURING THE DECADE OF THE 70'S¹

Robert J. Halstenrud²

Abstract.--Five nationwide surveys to determine participation in popular sports have been conducted since 1970. These, plus subsequent ones in the 1980's, will be useful to advertising agencies, the sporting goods industry and government planners. Swimming, bicycling, camping, fishing, and bowling have consistently held the top five spots. Jogging and tennis have recently moved into the top ten spots. Demographic changes, economic conditions and the energy situation may affect results of future participation surveys.

During the past ten years, the A.C. Nielsen Company has conducted five nationwide surveys designed to determine the estimated number of persons who are participating in several of the more popular sports. The first study, conducted in 1970, was a modest beginning which included only thirteen sport activities. The 1970 data were collected from respondents using the face-to-face personal interview approach. Three years later, in 1973, the second survey was conducted and coverage was increased to twenty-five sport categories. When launching the 1973 study a telephone interview, carried out in the quality-controlled environment of a centralized WATS facility, became the data collection method. These same telephone interviewing procedures have been used consistently in all of the subsequent studies of sports participation and, primarily for this reason, the 1973 survey serves as the benchmark for trending the results as measured in subsequent studies conducted during the 70's.

In 1974, widespread interest in tennis prompted a special, in-depth study designed to provide additional insights for this fast-growing market.

The fourth national study in 1976 represented a return to the conventional type of sports participation research, using the 1973 procedures, in order to report trends in a proper and consistent manner. Coverage was increased to 27 recreational sports. The 1979 survey is the fifth major piece of research conducted in connection with our on-going sports research

program. This most recent study included 30 sport categories, of which 23 are common to all of the surveys carried out in 1973, 1976, and 1979. Using 1973 as the base or benchmark year, the three-year intervals between each of the major studies form the framework for trending the estimated number of participants in the various sports measured during the decade of the 70's.

As each study is conducted, a separate report is prepared for each sport category. Of course, the primary study objective is to provide a continuing and consistent research effort in the field of leisure-time participant sport activities. Having accomplished this purpose, one of the several major objectives is to develop projected estimates and trends of the total number of participants in the United States. Having identified the participants in each respective sport category, another of the objectives is to profile the players by several demographic characteristics such as age, sex, education, annual household income and geographic location. Frequency of participation is obtained to classify the participants into categories of "heavy", "medium" and "light" players. These levels of play are then profiled to determine whether and to what extent differences may exist that can be used as tools in marketing the sport to specific target groups.

The objective of using the survey data to predict the future number of participants in any given sport is another value inherent in the Nielsen studies. In our opinion, this predictive feature will become of greater significance as more studies are conducted during the upcoming decade of the 80's. These new measurement periods will add to our present bank of data to establish long-term trends which can be correlated with other known variables and tracking measures that are maintained over time in order to predict more accurately the future

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

²Manager, Nielsen Developmental Syndicated Surveys, A.C. Nielsen Company, Nielsen Plaza, Northbrook, IL 60062.

number of participants.

The combination of all of these objectives determines those all-important marketing strategies that are needed for a particular sport to sustain itself as a growing and successful activity operating in a competitive environment with other participant-type sports as well as other types of leisure-time activities from which consumers have to choose. Finally, depending upon the nature of the sport, some of our other study objectives include information on equipment purchases, years of participation, ownership of equipment requiring a fairly substantial purchase investment, and the extent of accidents and/or injuries associated with participation in the sport.

In the 1979 survey, interviews were completed with 3,003 households within the Continental United States. Cooperating respondents (male or female head of the household) provided information about the sports participation habits of 9,019 persons living in those homes. The sample was designed using a modified random-digit-dial process to select the households that were interviewed. To implement this plan, a sample of listed telephone households is selected proportionate to total household population by county across the 48 contiguous United States. From this selection, the area code, prefix and first digit of the suffix were used to identify working banks of telephone numbers. Random numbers were generated by computer and substituted for the last three digits of each suffix to produce the final telephone sample. This randomization procedure insures that a high proportion of unlisted and newly listed telephones are represented.

To correct for any sample imbalances in projecting the sports participation levels to the total household and person populations of the contiguous 48 states, the projection factors were computed for each sample cell examined to bring the projections into proper alignment with the universe estimates. For households, projection factors were produced by county size within state. The projection factors for household persons were computed by four United States census regions and within each region by sex and age categories. Through this weighting and projection process, it was possible to bring the surveyed sample in line with the census estimates.

Now for a quick look at definitions. A "participant" or "player" is defined as any person who participates in an activity or plays a sport from time to time during the past twelve months. Within each sport category, there are also standard definitions that are used to identify players as being "heavy", "medium", and "light", depending upon their frequency of participation. A "participant or player house-

hold" is defined as having one or more members who engage in an activity or play a sport from time to time during the past twelve months.

While these qualifying definitions have been used consistently in all of our sports surveys, it is possible for users of Nielsen research to establish different participant criteria other than those described. For example, some organizations may determine that part or all of the "light" participant category as defined may not represent a viable target market for their products and/or services. Under such circumstances, it is possible to adjust the estimated number of participants and their respective profiles according to the revised definition.

Let's look at the trends in participation sports by their popularity rankings (Table 1). Swimming is the number one sport in the ranking of popularity. Bicycling has maintained the number two position in popularity in each of the survey measurement years. Camping was ranked fourth in 1973 and 1976. This activity has been growing in the number of participants during the decade of the 70's and has moved into the third most popular position in 1979, replacing the sport of fishing, which has been holding steady in terms of participants. Others in the top-ten ranking of popularity include bowling, boating (other than sailing), jogging/running (measured for the first time in 1979), tennis, pool/billiards, and softball. Overall, nine of the top ten sports have been included in all three studies; and six of the nine have shown player growth during the 70's, while three categories have held steady.

Roller skating, another newcomer in 1979, achieves a popularity ranking of twelve. Water skiing, shown in 1979 to be 16th in popularity, is actually in the 14th spot among the sports that have been included in all of the measurement years. Snow skiing is ranked 18th, but it is 16th among the sports common to all three studies. Without question, water skiing and snow skiing have continued to move up in popularity since 1973. Table tennis and ice skating are moving downward in popularity, while the others in this group are holding their respective positions when the categories measured for the first time in 1979 (jogging/running and roller skating) are removed from the comparisons.

Racquetball is ranked twenty-first in popularity and leads the list of sports included in the third group of ten. Actually, on a 1976 to 1979 common base of twenty-seven sports (that is not including the new categories added in 1979), racquetball in 1979 would rank nineteenth in popularity compared to being in the twenty-fourth position in 1976. Soccer was added to the list of sports measured in 1979, and is ranked twenty-fifth among the thirty categories in the study.

Table 1.--1979 popularity of participation sports -- top-thirty rankings

Activity	1973	1976	1979
Swimming	1	1	1
Bicycling	2	2	2
Camping	4	4	3
Fishing	3	3	4
Bowling	5	5	5
Boating (Other than sailing)	8	7	6
Jogging/running ^a	-	-	7
Tennis	12	9	8
Pool/billiards	7	6	9
Softball	9	10	10
Table tennis	6	8	11
Roller skating ^a	-	-	12
Basketball	11	11	13
Hunting	13	13	14
Ice skating	10	12	15
Water skiing	17	17	16
Golf	14	14	17
Snow skiing	20	18	18
Baseball	15	15	19
Football	16	16	20
Racquetball ^b	-	24	21
Motorbiking/motorcycling	18	19	22
Sailing	21	21	23
Snowmobiling	19	20	24
Soccer ^a	-	-	25
Handball ^b	-	23	26
Archery	22	22	27
Paddle tennis ^b	-	26	28
Ice hockey	23	25	29
Platform tennis ^b	-	27	30

^aNot measured in 1973 and 1976.

^bNot measured in 1973.

Even more important than the trends in the ranking of popularity are the trends as expressed by the actual number of estimated participants. The thirty sports have been divided into two major categories--team sports and individual-type sports. Simply defined, a team sport is an activity normally associated with a group effort, which allows player substitutions. Individual-type sports are those activities generally considered to be a singular effort (or perhaps a double-player endeavor) with no substitution of participants.

In the next series of figures, each sport is represented by a series of three vertical bars. The bar on the left sets forth the estimated number of projected participants, in millions, as measured by our 1973 benchmark survey. The middle bar is the projected figure from the 1976 survey, and the third bar relates the 1979 projection.

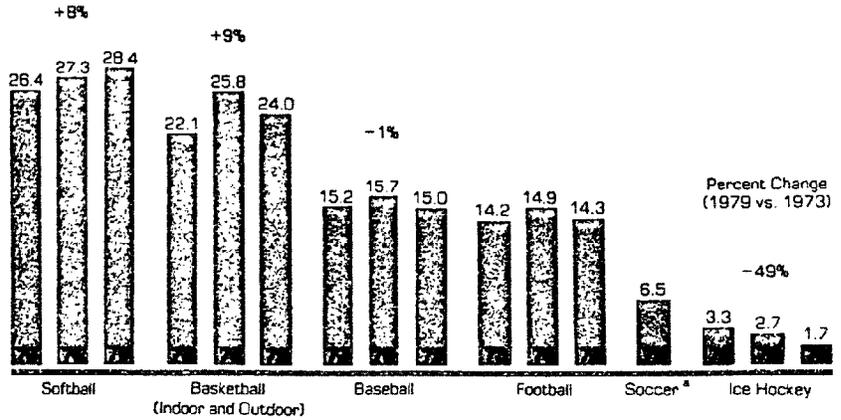
Among the team sports included in the Nielsen surveys (Figure 1.), softball is the most popular, and currently boasts a total of about 28.5 million players. This estimate is up about 8 percent from the 26.4 million projected in 1973. Basketball participation (including both indoor and outdoor play) is now at a level of 24 million, which is about 9 percent higher than the 22.1 million figure reported in the 1973 base-year study. Baseball and football trends are quite similar with the number of participants holding fairly steady at levels of just over 15 million and 14 million, respectively. Soccer, measured for the first time in 1979, appears to be coming on strong in the United States; the current estimate of participants is about six and one-half million. Ice hockey participation has been in a downward slide since 1973, going from 3.3 million players in the base year down to 2.7 million in 1976, to about 1.7 million in 1979.

To summarize the team sport trends during the 1970's, softball has shown consistent increases in the number of players across each of the measurement years. The remaining team sports reveal some modest declines in participation from 1976 to 1979. This is believed to be a reflection of the decline in the ranks of teenagers that has taken place during the late 70's. Softball, on the other hand, continues to be played by both males and females beyond the high school and teenage years.

Figures 2a and 2b depict trends in individual-type sports that have shown growth in number of participants since 1973. It should be noted the sports are listed in order from left to right by popularity and not by their respective growth records. Bicycling, camping, bowling, and boating (other than sailing) have shown participant increases ranging from 6 percent to 16 percent since the base year study of 1973. Note the trend in the number of bicyclists; overall, an increase of about 6 percent is reported from 1973 to 1979. However, the projected number of bikers was down to about 70 million in 1979 from the 75 million as measured in 1976. If a new study was to be conducted in the spring of 1980, it is believed the number of bicyclists would be up to some degree over the 70 million reported in the spring of 1979, primarily because of the recent gas shortages and the dramatic increase in gasoline prices.

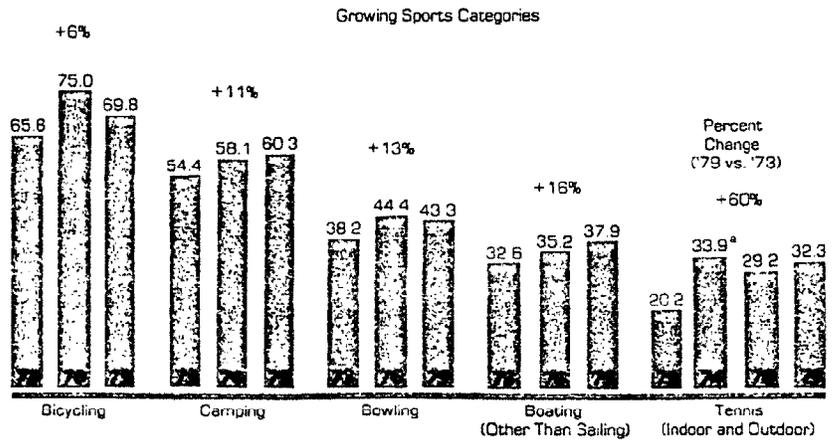
For the sport of tennis, there are four bars of projected survey information because of the special, in-depth study conducted in 1974. In the course of just one year -- from 1973 to 1974 -- the number of tennis players surged from 20.2 million to 33.9 million, then the projected figure retrenched somewhat to 29.2 million in 1976 and recovered well in 1979 to a level of 32.3 million participants. Overall, the 1979 projection represents a healthy increase of 60 percent for the tennis category when compared to the benchmark year of 1973.

FIGURE 1.-- Trends in Team Sports -- 1973 to 1976 to 1979 (Millions)



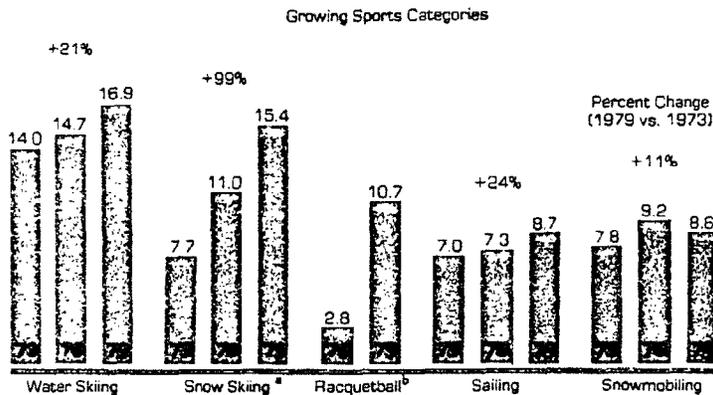
^aNot measured in 1973 and 1976.

FIGURE 2A.-- Trends in Individual-Type Sports -- 1973 to 1976 to 1979 (Millions)



^aSpecial in-depth study.

FIGURE 2B.-- Trends in Individual-Type Sports -- 1973 to 1976 to 1979 (Millions)



^aIncludes downhill and cross-country.

^bNot measured in 1973.

Without question, racquetball is the fastest growing sport of the 70's, with participation skyrocketing to 10.7 million players in 1979 from about 2.8 million fans in 1976. Snow skiing, which includes both downhill and cross-country, is number two in growth since 1973, going from 7.7 million skiers in 1973 to about 11.0 million in 1976 to 15.4 million in 1979-- a 99 percent increase over the six-year span of time from 1973 to 1979. Water skiing and sailing represent two other categories with very respectable growth records.

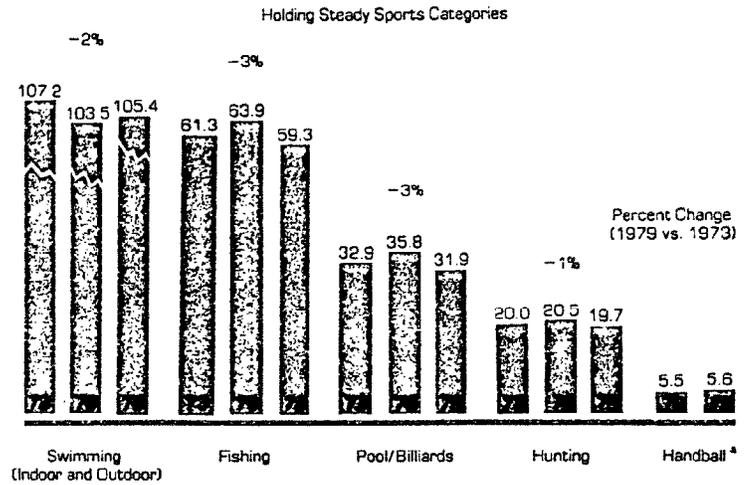
Those sport activities that classify as "holding steady" during the decade of the 70's include swimming (both indoor and outdoor), fishing, pool/billiards, hunting, and handball (Figure 3.). Swimming, which holds the number one ranking in popularity, is a leisure time activity that has maintained consistently over the three surveys a level of over 100 million participants. Handball, a close relative of racquetball, has about 5.6 million players and this estimate is holding steady with the projected number of 5.5 million in handball participants as reported in 1976.

Among the declining sports (Figure 4), there are two categories that are down dramatically in number of participants. Table tennis, which currently claims about 27 million players, is off about 20 percent from the 33.5 million persons who participated in 1973; and ice skating, while increasing somewhat in

number of participants from 1973 to 1976, has closed out the 70's with a substantial reduction to 18.9 million. The activities of golf, motorbiking/motorcycling, and archery are trending downward in the number of participants since 1973. Actually, the declines for these three categories are not all that dramatic; and since there is evidence of some stability, there are no doubt some observers who might choose to classify these activities as "holding steady" rather than positioning them in the category of declining sports for the decade of the 70's.

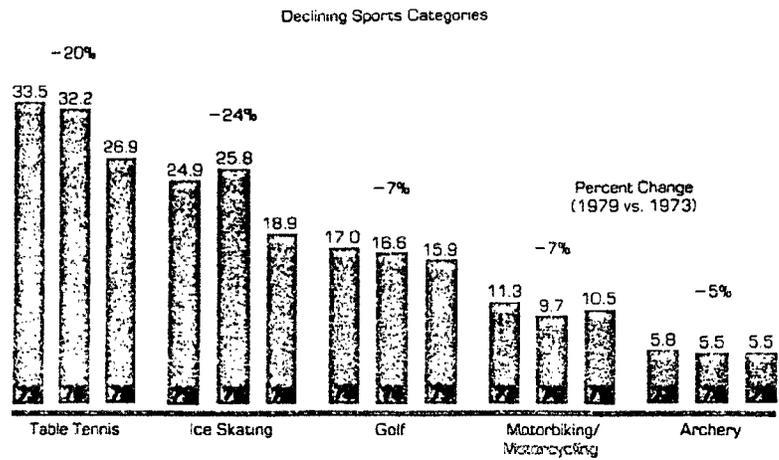
Our written reports on each activity contain the 1979 demographic profiles of the participants, as well as the demography measured in the studies conducted prior to the 1979 survey. This back data makes it possible to track the trends that have taken place in these demographic variables. Demographic shifts over time have enormous implications for business, in terms of developing marketing plans and designing marketing promotions and advertising targeted to specific audiences and/or population groups. Having an awareness of the demographic trends that are taking place over time, marketers can examine their significance and begin to make some judgments concerning their impact upon the future.

FIGURE 3.-- Trends in Individual-Type Sports -- 1973 to 1976 to 1979 (Millions)



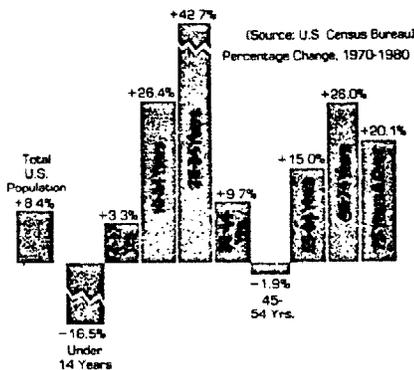
^a Not measured in 1973.

FIGURE 4.-- Trends in Individual-Type Sports -- 1973 to 1976 to 1979 (Millions)



In moving from the end of one decade to the beginning of another, several articles have appeared in newspapers and magazines dealing with the demographic direction of the population in the United States. These decade-to-decade comparisons are helpful in developing a perspective for future planning. For example, the United States Census Bureau provides us with age changes in our population that took place from 1970 to 1980 (Figure 5). During the 70's, the overall population of the United States increased 8.4 percent. The biggest upward shifts in population from 1970 to 1980 took place among those persons in the age categories of 18 to 24 years and 25 to 34 years. Since these age classifications also account for a high proportion of racquetball players, it can be concluded the age shifts had a significant impact on the growth of racquetball during the decade.

FIGURE 5.--Population Shifts in the 1970's by Age

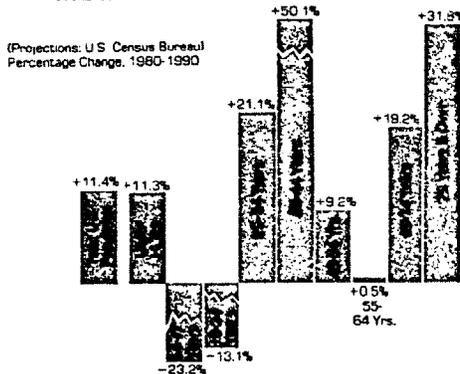


Census Bureau data also tells us of a rather sharp decline in the number of children under 14 years of age between 1970 and 1980 (Figure 5).

Looking ahead to the decade of the 80's, as projected by the Census Bureau, it is expected the total population in 1990 will increase by 11.4 percent (Figure 6). Certainly one of the most dynamic age demographic changes of the 80's will be in the decline of persons between the ages of 14 and 24. The upward bulge in population for the age categories of 18 to 24 years and 25 to 34 years during the past decade moves up primarily to the age category of 35 to 44 years over the next ten years. Of course, the 25 to 34 year old group is still expected to increase in numbers by about 21 percent during the 80's. So, when relating the age shifts for the 80's to the age profiles of, let's say, racquetball players as we know them today, it would appear these age changes may continue to have a favorable impact on racquetball player growth during the early 80's;

but this trend may begin to have a slowing influence at the close of the decade. Of course, at the same time, marketing of the sport of racquetball during the 80's may also change the trends in player profiles. If this player profile change was to be similar in nature to the age shifts that are expected to be upward, the net result would continue to have a favorable implication on the future of racquetball.

FIGURE 6.--Population Shifts in the 1980's by Age



The next major Nielsen Sports Participation Survey is scheduled for 1982. It is difficult to predict what directions the trends in participant sports will take during the early 80's. We all know there are several variable factors that contribute in one way or another to the increase or decrease in popularity of different sports. Certainly the worsening energy situation in the United States is going to have some adverse effects on trends for some sports while other participant sport categories will benefit. Inflation and its effect upon discretionary income can also have both negative and positive implications on growth.

It is reported that more Americans will have more time available in the coming years for leisure activities. In the minds of these consumers, a participant sport has an image based upon such factors as costs, skills required to obtain a favorable level of player satisfaction and supply availability. These conditions create competition between the sports to garner participants and, thereby, offer a vast array of marketing challenges.

As recreation planners and researchers, you are keenly interested in the supply and demand comparisons. Without question, it can be summarized by the old adage that the only constant is change. Certainly growth cannot be expected to happen by itself. Becoming more perceptive and gaining more knowledge about the recreation industry will provide insights to help in managing this change with even greater efficiency in the 80's.