



**American Recreation Coalition**

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

# **OUTDOOR RECREATION OUTLOOK 2018**

**Prepared for ttra**

**2017 Marketing Outlook Forum**

# OUTDOOR RECREATION OUTLOOK 2018

## OVERVIEW:

Outdoor recreation is a driving force in the American economy, generating more than \$887 billion in annual spending and supporting tens of millions of jobs across the country. America's Great Outdoors and the opportunities for healthy, active fun it provides loom large in the public eye as federal land and water management agencies – which collectively oversee nearly one-third of the surface of this country – have placed an increased focus on outreach and promotion. Secretary of the Interior Ryan Zinke is harnessing the experience and know-how of the recreation industry by forming the Recreation Advisory Committee and engaging with industry groups like the Outdoor Recreation Industry Roundtable to examine how public-private partnerships can expand access, inspire innovation, improve infrastructure and more. Public agencies are encouraging visitation, including a major outreach to families with children through "[Every Kid in a Park](#)." This important program, now in its third year, is focused on getting all four million 4<sup>th</sup> graders and their families across the country to a state, national or local park, and then encouraging return visits throughout the year with a free entrance pass for federal sites. And Congress is getting involved, with legislation aimed at expanding concessions in national parks, creating an Outdoor Recreation Satellite Account, and more.

Efforts to boost domestic visitation are complemented by greater federal enthusiasm for promoting America's Great Outdoors as a destination to international visitors. Increased participation at promotional events like [IPW](#) – celebrating its 50<sup>th</sup> year in Denver, Colorado in 2018 – and tools such as 100 easy, pre-planned trip itineraries show that federal agencies and their partners are ready to do their part in growing international tourism to the United States to the national goal of 100 million annual visitors.

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

## NATIONAL PARKS:

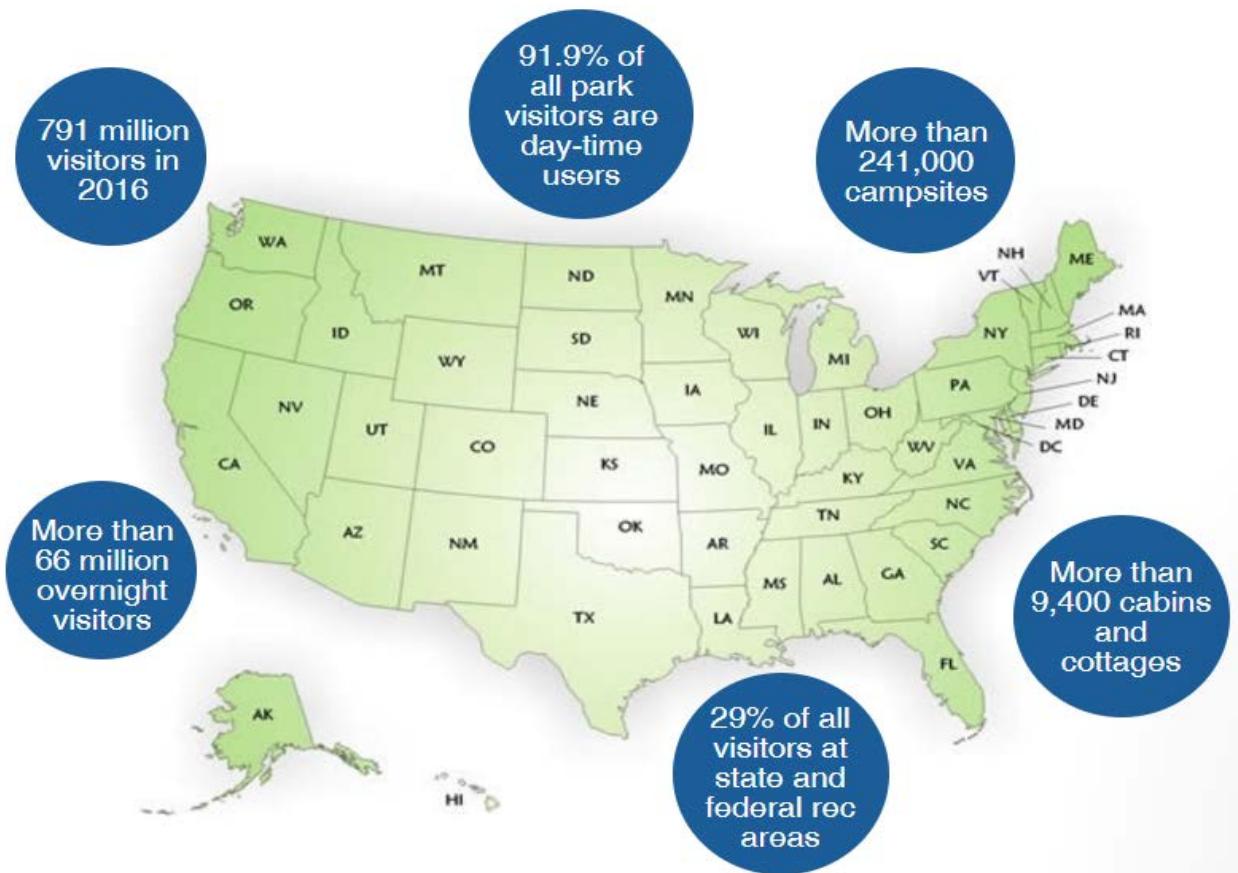
The National Park Service (NPS) has an extraordinary opportunity to make fundamental and badly needed changes to how it funds maintenance and visitor services. Private investment in services like front-country broadband connectivity, modernized campgrounds, electronic fee collection and more can help enhance visitor experiences and bring them into the 21st century.

The National Park System contains 400+ units across the country, ranging from world-renowned treasures to small, urban historic sites. Overall, year-to-date visitation to NPS units is up 7.7% over 2016, an increase of 23.7 million visits. Many units, including Everglades

National Park, Glen Canyon National Recreation Area and Joshua Tree National Park, have seen significant attendance increases.

Many of the 330+ million visits to national parks rely upon services of national park concessioners, including lodging, food, retail, transportation and guide services. Concessioners employ over 25,000 during peak season and have long been leaders in park promotion efforts. Concessioners are working with federal agencies, state tourism agencies and gateway communities. Most importantly, concessioners are committed both to meeting America's needs for healthier lifestyles, for better and lifelong educational opportunities, and for strong local and regional economies that sustain and protect our parks, and to connecting all Americans to our parks across differences in regions, age, income and ethnicity.

### STATE PARKS:



America's state parks are one of the fastest growing venues for outdoor recreation on public lands and waters. More than 10,000 areas, including more than 9,000 trails over 38,000 miles in total length, provide wonderful outdoor recreation experiences and unique education opportunities. Their 18.5 million acres provide for great diversity and were enjoyed by more than 791 million visitors in 2016, 373 million of which were to fee-collecting areas.

More and more, the importance of state parks and their growing attendance is being recognized by state legislatures, with total capital expenditures for state park operations

totaling \$580 million. This is a result of increased funds and bonds thanks to the recovering economy.

According to the Annual Information Exchange (AIX) Report, operating expenditures for state parks added up to \$2.46 billion, less than 50% of which comes from states' general funds.

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

### RECREATION.GOV:



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

## VEHICLE SALES:



The RV industry's shipments are expected to continue rising through 2018, according to a new Recreation Vehicle Industry Association (RVIA) forecast. Since the "Great Recession," when the market bottomed in 2009, the RV industry has come roaring back with RV shipments up more than 189%. RV shipments are expected to total 479,700 in 2017, an 11.38% gain over 2016, the best year on comparable record. RV shipments are forecast to increase to 491,200 in 2019, which represents the ninth consecutive year of gains, the longest ever recorded. The largest unit gains in 2016 and 2017 are expected in conventional travel trailers.

Shipments of towable RVs are expected to reach 419,500 units in 2017 and 429,300 units in 2018, representing 87% of all shipments for those two years. Meanwhile, motorhome shipments are projected to represent 13% of all shipments, the best performance in a decade – with 60,200 units in 2017 and 61,900 in 2018.

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

Recreational use of on- and off-highway motorcycles, ATVs, and ROVs is also growing. This sector of the recreation industry contributes nearly \$109 billion in direct spending to the U.S.

economy annually and over 1.5 million jobs. Recreational off-highway vehicles (also known as side-by-sides) are becoming increasingly popular and are the fastest growing segment of the powersports market. Nearly 30 million Americans ride motorcycles on and off roads, and ATV ridership is some 35 million annually.

## **FISHING:**

Fishing participation increased by 1.5 million in 2016, according to the Recreational Boating & Fishing Foundation (RBFF) and the Outdoor Foundation's 2017 Special Report on Fishing. While fishing is still the second-most popular outdoor activity among adults, it's gaining ground on the number one spot – jogging.

Perhaps most importantly, RBFF's work to target youth, women and Hispanics is working. Youth participation rose 3% while Hispanic participation increased by 11%. Not only are more Hispanics taking up fishing, but they go on six more outings per year than anglers in the general market. Newcomers to the sport accounted for 5.3% of total participants and tended to be young and female.

The "Leaky Bucket" of fishing participation, where the anglers lapsing out of the sport outnumbered the amount of newcomers, has been plugged. In addition to the increase in participation, the amount of churn also decreased by 4%.

"These findings energize us and provide some validation for the work we are doing on a daily basis," said RBFF President and CEO Frank Peterson. "Our efforts to recruit new audiences and bring families to the water are certainly paying off. 60 in 60 (which aims to grow participation to 60 million U.S. anglers within 60 months) is off to a great start, and effective R3 (recruitment, retention and reactivation) programs will only grow the participant base and secure funding for conservation programs for years to come."

## **ARCHERY:**

Archery participation in America climbed over 20% from 2012 to 2015, boosting the number of archers to 23.8 million, an increase that can partially be attributed to the prominence of archery in pop culture. According to a study from the Archery Trade Association (ATA), 9.9% of Americans age 18 and older shot archery sports in 2015. 64% of archery participants are male, and 36% are female. Archery participants are focused on fun, with 76% of participants shooting as recreational archers. Thirty-five percent are bowhunters, who shoot exclusively to prepare for bowhunting.

## **BOATING:**

The \$36 billion U.S. boating industry is seeing some of its highest sales in nearly a decade. Unit sales of new powerboats increased 6% in 2016, reaching 247,800 boats sold, and are expected to increase an additional 6% in 2017 – a trajectory the National Marine Manufacturers Association (NMMA) anticipates to continue through 2018.

“Economic factors, including an improving housing market, higher employment, strong consumer confidence, and growing disposable income, are creating a golden age for the country’s recreational boating industry,” said Thom Dammrich, President of NMMA. “We expect steady growth to continue across most boat categories through 2017 – and into 2018 – to keep up with the acceleration in demand for new boats.”

Most segments in new boat sales are growing, with outboard boat sales – which represent 85% of new traditional powerboats sold, and include pontoons, aluminum and fiberglass fishing boats, as well as small fiberglass cruising boats – were up 6.1% in 2016. Sales of new ski and wakeboard boats were up 11.5%, new personal watercraft sales rose 7.3%, and jet boat sales increased 8.7%.

Added Dammrich, “We continue to attract new and younger boaters and boat owners through the industry’s Discover Boating campaign.”

### **HORSEBACK RIDING:**

As a large, economically diverse industry, the U.S. horse industry contributes significantly to the American economy. The industry contributes approximately \$39 billion in direct economic impact to the U.S. economy, and supports 1.4 million jobs on a full-time basis. When indirect and induced spending are included, the industry’s economic impact reaches \$102 billion.

Recreational riding remains the largest segment of the equine industry overall – generating an economic impact of \$32 billion and involving more than 3.9 million horses! Recent data indicates that the horse industry is beginning to trend upwards, with more spectators and equine enthusiasts becoming involved in the industry by either going to equine events such as horse shows or racetracks, or taking their first riding lesson. The American Horse Council’s (AHC) Time to Ride program has introduced over 22,000 newcomers to the joy of horses in 2017 alone! In 2018, the AHC will release the results of its new Economic Impact Study of the U.S. Horse Industry.

### **CAMPING:**

KOA – the nation’s largest private campground system – reports a very strong year across the board. According to KOA’s 2017 North American Camping Report (available [here](#)), camping remains one of the most popular, affordable and accessible pastimes in North America. An estimated 13 million U.S. households planned to camp more in 2017 than they did in 2016, and more than 1 million new households have started camping each year since 2014. Millennials are driving this growth as they take to the outdoors in greater numbers, and they have no intention of letting up.

Millennials now account for 38% of the 75 million active camper households in the U.S., up from 34% in 2016, and 51% say they plan to increase their camping. Their key reasons for camping include spending more time with friends and family, being physically active and improving their overall emotional well-being and health.

Camping is becoming a more social activity, and outdoor-recreation-while-camping is shifting to more physically active activities. In this year's results, hiking outranked fishing as the most popular type of camping recreation for the first time. Kayaking and mountain biking also saw significant increases.

"Camping continues to grow in popularity, with more Americans starting to camp and people taking more frequent trips each year," said KOA COO Toby O'Rourke. "Year-over-year people consistently say camping allows them to relax, spend time with family and friends, be active and contributes to their emotional well-being. The significant growth in camping underscores Americans' enthusiasm and growing desire to get outside. Camping – whether it's traditional tent camping, RVing or staying in a full-service cabin – will continue to fulfill that need."

In an even more promising outlook for the future of camping and outdoor recreation in America, Generation Z teens (ages 13-17) are highly enthusiastic about camping and place a great deal of importance on people their age spending time outdoors. The findings indicate that teens share their adult counterparts' feelings about the benefits and emotional connections to camping. This finding suggests that as more families experience the outdoors, the more likely they are to continue those activities and consequently, this trend will result in continued increased overall incidence of camping nationally, and particularly among families.

#### **SKIING:**

U.S. ski areas tallied 54.8 million skier and snowboarder visits during the 2016-17 season, up 3.7% from last season. This past season, ski areas in the Northeast region experienced an impressive rebound, as skier visits grew by 28% to 11.9 million visits. In addition, the Rocky Mountain region had its second-best winter in terms of skier visits (21.7 million). Visits were up from last winter in the Southeast region, but down slightly in the Midwest, Pacific Northwest, and Pacific Southwest regions.

The traditional ski holiday periods of Christmas and Spring Break were busy at resorts across the country, contributing to the overall positive season. Skier visits were up 29% in December and up 35% in April, relative to the 2015-16 season.

Encouragingly, the number of open and operating U.S. ski areas rose to 481 in the 2016-17 season, up from 463 last season. The Northeast region has witnessed a rebirth of several formerly defunct ski areas in the past few seasons – a positive sign for skiers and snowboarders seeking out new places to visit and for local populations who want to learn to slide on snow.

The number of lessons taught at U.S. ski areas increased this season, indicative of the growing appetite to learn to ski and snowboard.

Average resort snowfall increased by 40% nationally, which contributed to ski areas being open an extra week, on average, compared to the 2015-16 season. The increased length of the operating season was most pronounced in the Southeast (23 days longer) and Northeast (17 days longer) regions.



Following the 2011 passage of the Ski Area Recreational Opportunity Enhancement Act (SAROE) authorizing summer uses on Forest Service lands, summer visitation at ski areas has jumped by 20%, with resorts investing in non-skiing related infrastructure such as zip lines, ropes courses, mountain coasters, alpine slides, mountain bike trails and parks and other amenities. The percent of annual revenue attributable to summer operations has increased from 7% 15 years ago to 12.7% in the 2016/17 fiscal year, with a particular rise noted in the past four years. Eighty percent of all ski areas now operate during the non-winter months, and 34% of resorts offer a summer season pass.

### **SNOWMOBILING:**

Sales of new snowmobiles in 2017 declined slightly due to poor snow cover and higher than normal temperatures in the Northeast region of the United States, according to the International Snowmobile Manufacturers Association. Annual registration of snowmobiles remains constant at 1.36 million. There was a decline in snowmobile registrations in the Northeast US with an increase in registrations in the West. Average use of snowmobiles remained steady with a slight increase in the Western snowmobile states.

Fall shows for the 2018 sales year are reporting large, enthusiastic crowds with sales increasing 10% compared to last year's shows. The winter weather forecast for Winter 2018 calls for above average snowfall and seasonal temperatures. The Mountain regions of the country are receiving record levels of early snowfall and the industry's customers are responding positively to the initial snow cover.

### **OUTDOOR ADVENTURE SPORTS:**

Active and adventure travel outfitters experienced a very strong year in 2017 as industry diversification continues to offer new experiences in the outdoors. Demand for lodging, particularly cabins packaged with outdoor recreation activities, continues to outpace other services. That trend is expected to continue through 2018.

Other strong activity segments include water-based day trips near urban areas or near destination attractions. Guided hiking, jeep tours, horseback riding and iconic multi-day trips, such as rafting the Colorado River through the Grand Canyon, continue to experience strong demand, trends which should prevail through 2018. Late summer fires in Montana and California created some disruptions but thanks to help from the Forest Service, especially in Montana, many land-based outfitters were able to relocate their trips to unblemished locations.

### **SUMMARY:**

Recreational activities continue to be a core part of the American lifestyle. Recreational activities are also a vital aspect of international visitation – the Department of Commerce

reports that 40% of the nearly 25.6 million non-North American leisure visitors to the USA in 2016 included national parks in their experience. Most components of the recreation industry reported significant gains in 2017 and the general outlook for the industry in 2018 continues to be optimistic. Our conclusion in the comparable forecast last year was that recreation activities will increase as more people seek active, healthy, “high value” vacationing. Even more now, we see America’s Great Outdoors as a perfect fit for this desire.

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