INFORMED DECISIONS USING CENSUS AND SURVEY DATA

- Population and Demographic Trends
- Urban Growth and Rural Transition
- Economic, Consumer Spending and Internet Trends
- General Public Demand (NSRE) and Outdoor Recreation on Increasingly Urban NFs (NVUM)
- Considering What the Public Values and Discussion

March 9

2004 Recreation Short Course
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Ken Cordell, FS, Athens

John Bergstrom, UGA

Carter Betz, FS, Athens

Gary Green, UGA

www/srs.fs.fed.us/trends

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A Wee Contribution to the:

Technical Guide for Integrating Recreation, Heritage and Wilderness into Land and Resource Management Planning

DRAFT

12/22/03

III. RHWR INTEGRATION IN LRMP REVISON (Planning Model)

- Introduction
- Demand
- Supply
- Developing Potential RHWR Niche (functional)
- Developing NFS Unit Vision (interdisciplinary)

Primary Data

- **NSRE – National Survey of Recreation and the Environment**
- **NVUM – National Visitor Use Monitoring** ?
- **INFRA – Physical Capital Assets**
- **NRIS – Natural Resource Information System**
- **Census – Demographics**
- **Heritage**

PRINCIPLES of GOOD RECREATION PLANNING

- **Size, distribution, makeup and trends in local and regional populations define the public context within which your decisions resonate (or don't)**
- Your optimum client base and most widely popular and beneficial offerings do not always match the wants of those standing at your door, and may not match wants of your current visitor base
- Complementing the recreation services and facilities of other agencies and private businesses in your service area makes good sense and enhances economic growth
- There are equity and other social issues associated with every decision you make and accounting for them is a responsibility of good planning
- Fragmented (compartmentalized) decision making is easier, but not better
- Good planning is forward looking, based on what could and should be, not necessarily what is or has been

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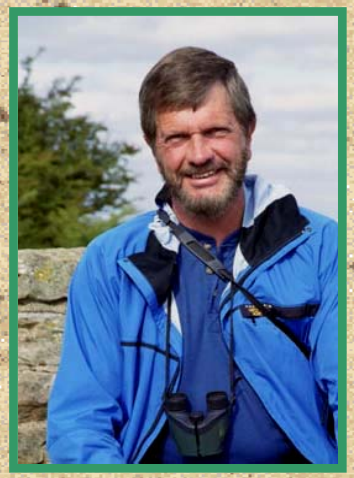
Footprints on the Land:

An Assessment of Demographic Trends and the Future of Natural Resources in the United States

****

****

By
H. Ken Cordell
Christine Overdevest,
Principal Authors



DEMOGRAPHIC DATA SOURCE

This published book examined the population, demographic, urban, rural, economic, leisure and recreation trends of the United States. An update is underway.

Dominant Socioeconomic Forces Shaping the Future of the United States: An Update of Footprints

By

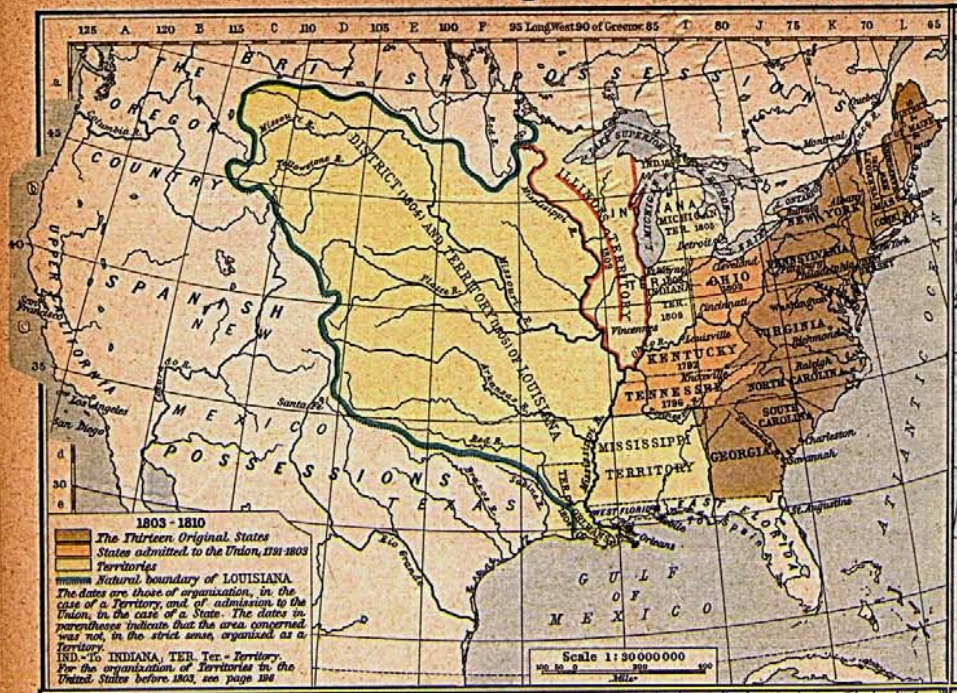
H. Ken Cordell[1], John C. Bergstrom[2], Carter J. Betz[1], and Gary T. Green[2]

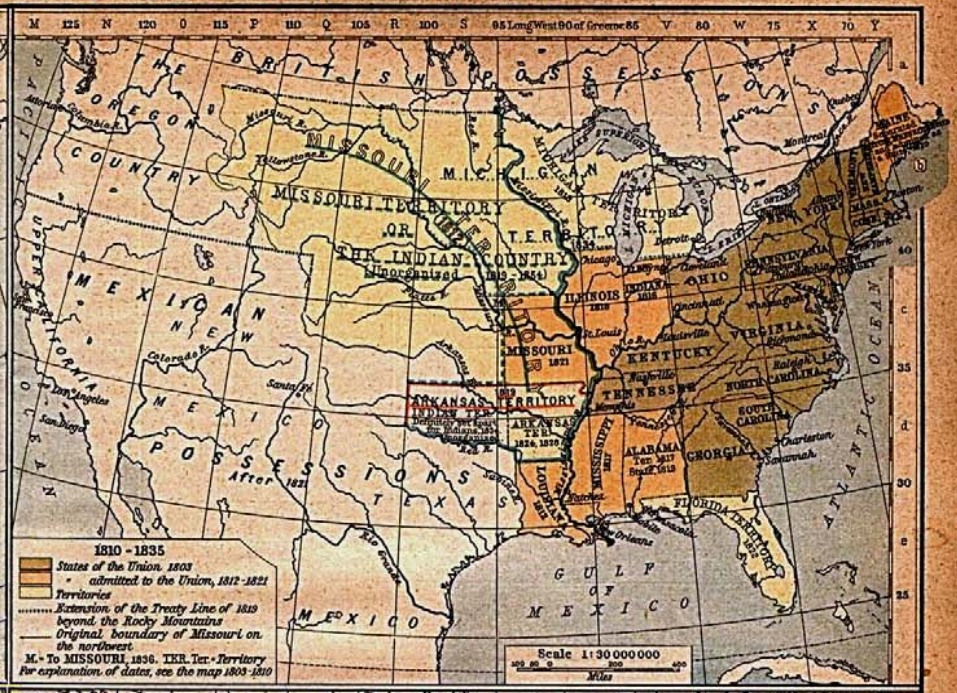
Introduction

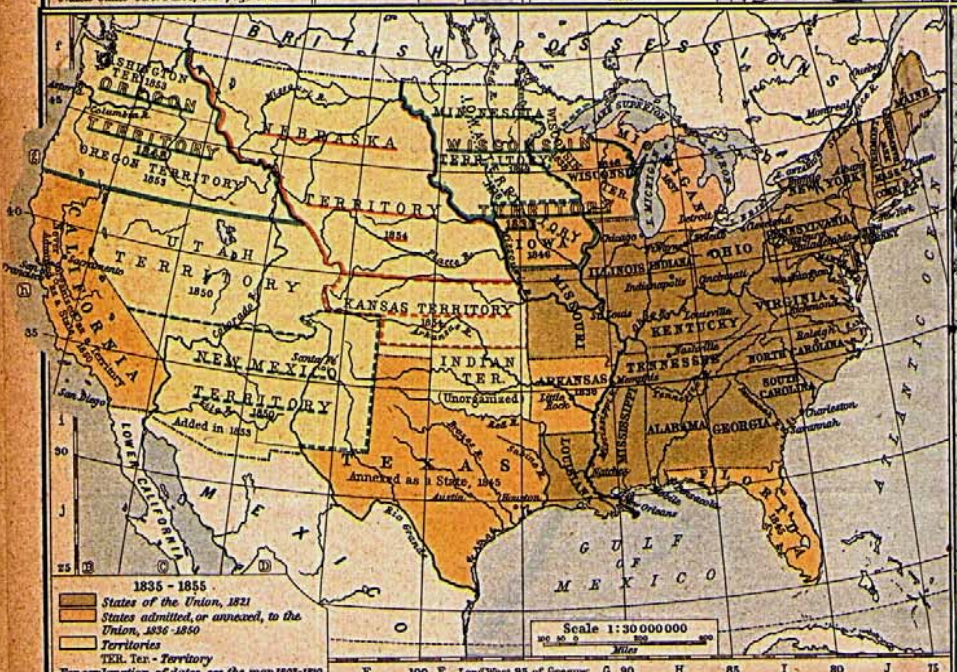
This chapter is devoted to providing up-to-date summaries of a number of highly important social and economic trends that will play a role in the future of the United States and its natural resources. The trend topics covered include population growth, changing composition of the population, urban growth and sprawl, transition of rural lands, economic growth, consumer spending, and recreation demands. This chapter is essentially an abbreviated update of the book *Footprints on the Land* (Cordell & Overdevest, 2001). It is undertaken ……..

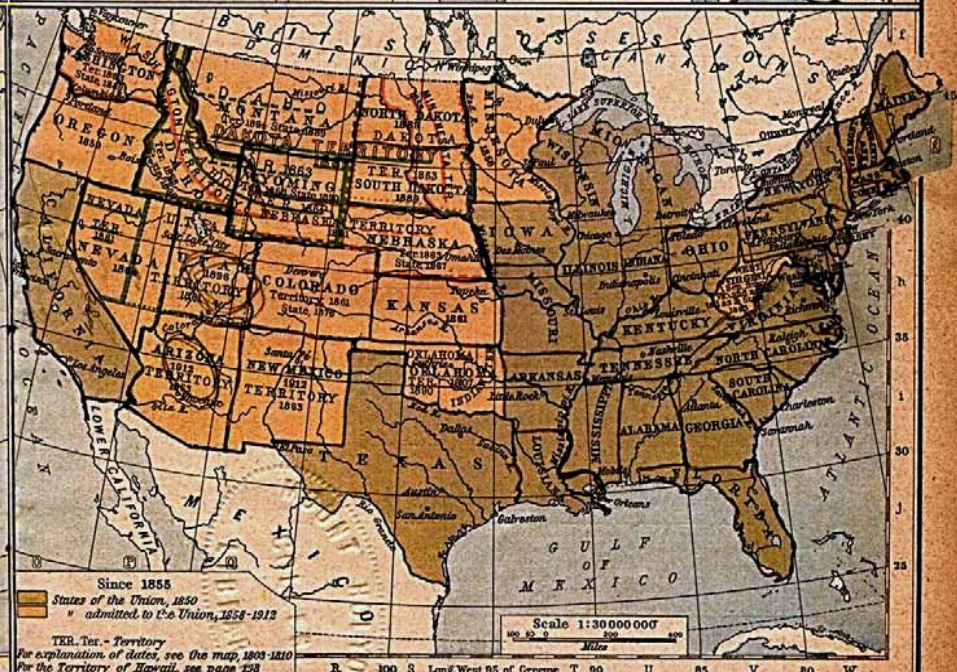
[1]Project Leader and Outdoor Recreation Planner respectively, USDA Forest Service, Southern Research Station, Athens, GA.

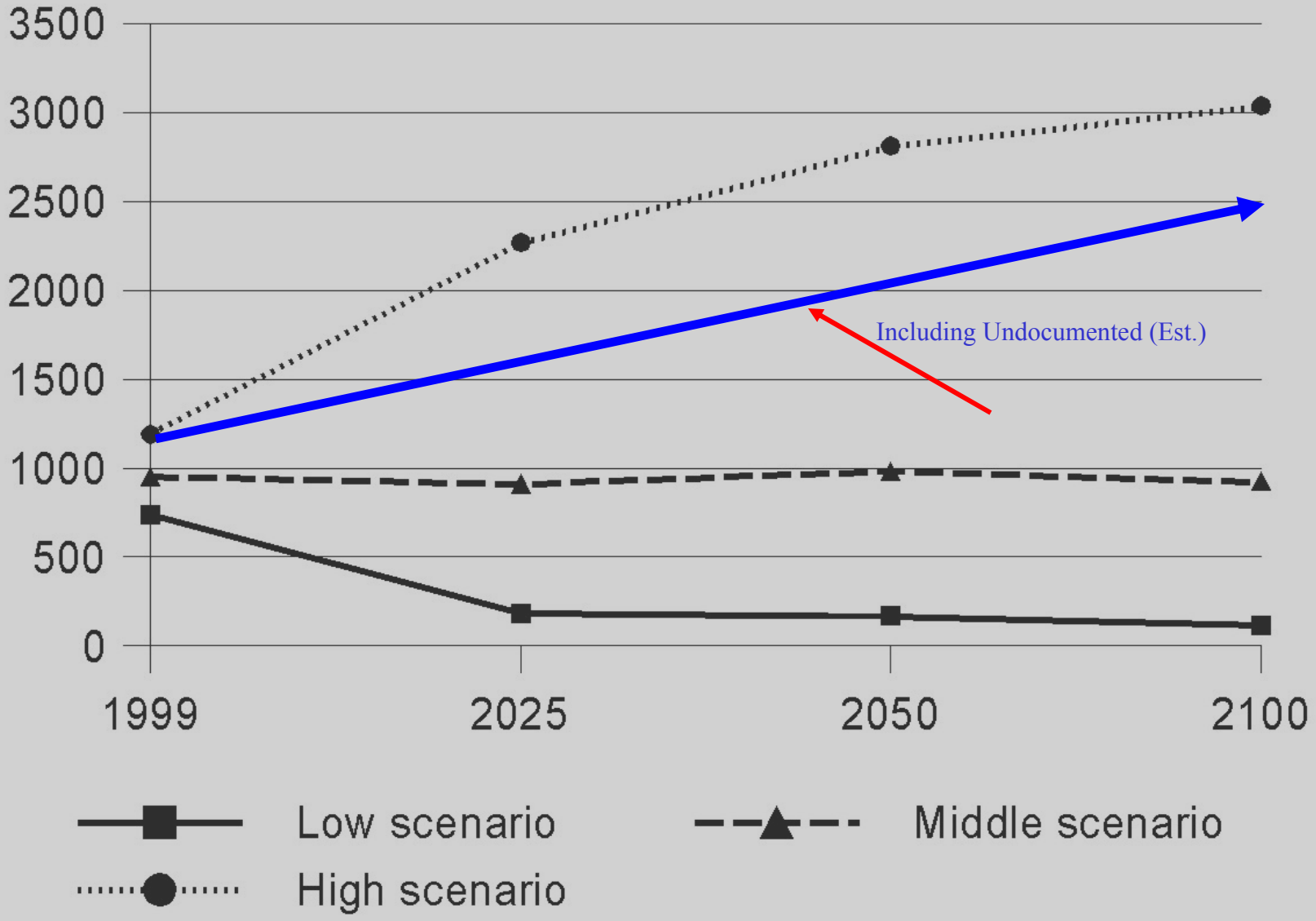
[2]Respectively, Professor, Agriculture & Applied Economics, and Assistant Research Scientist, Warnell School of Forest Resources, University of Georgia, Athens, GA.





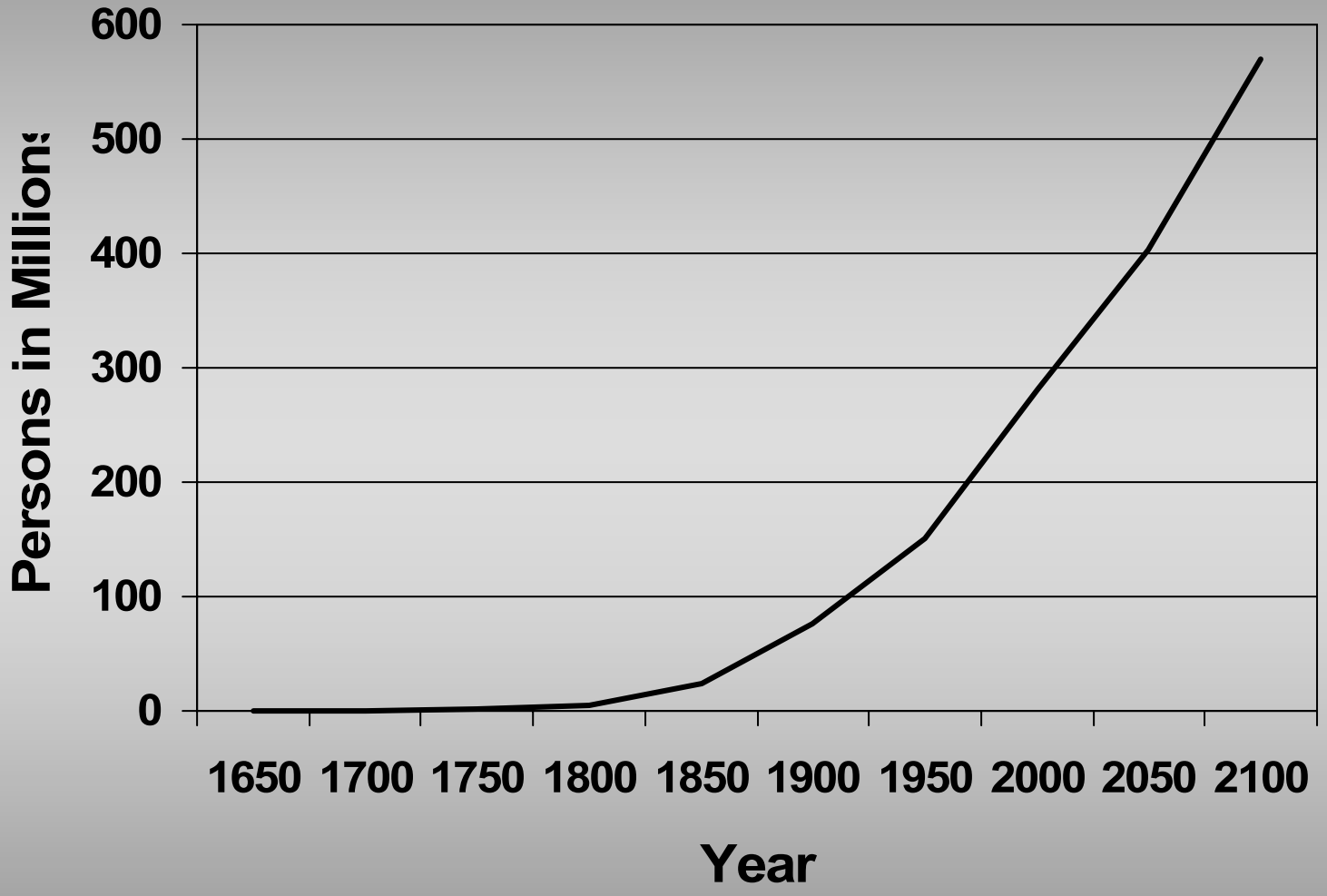




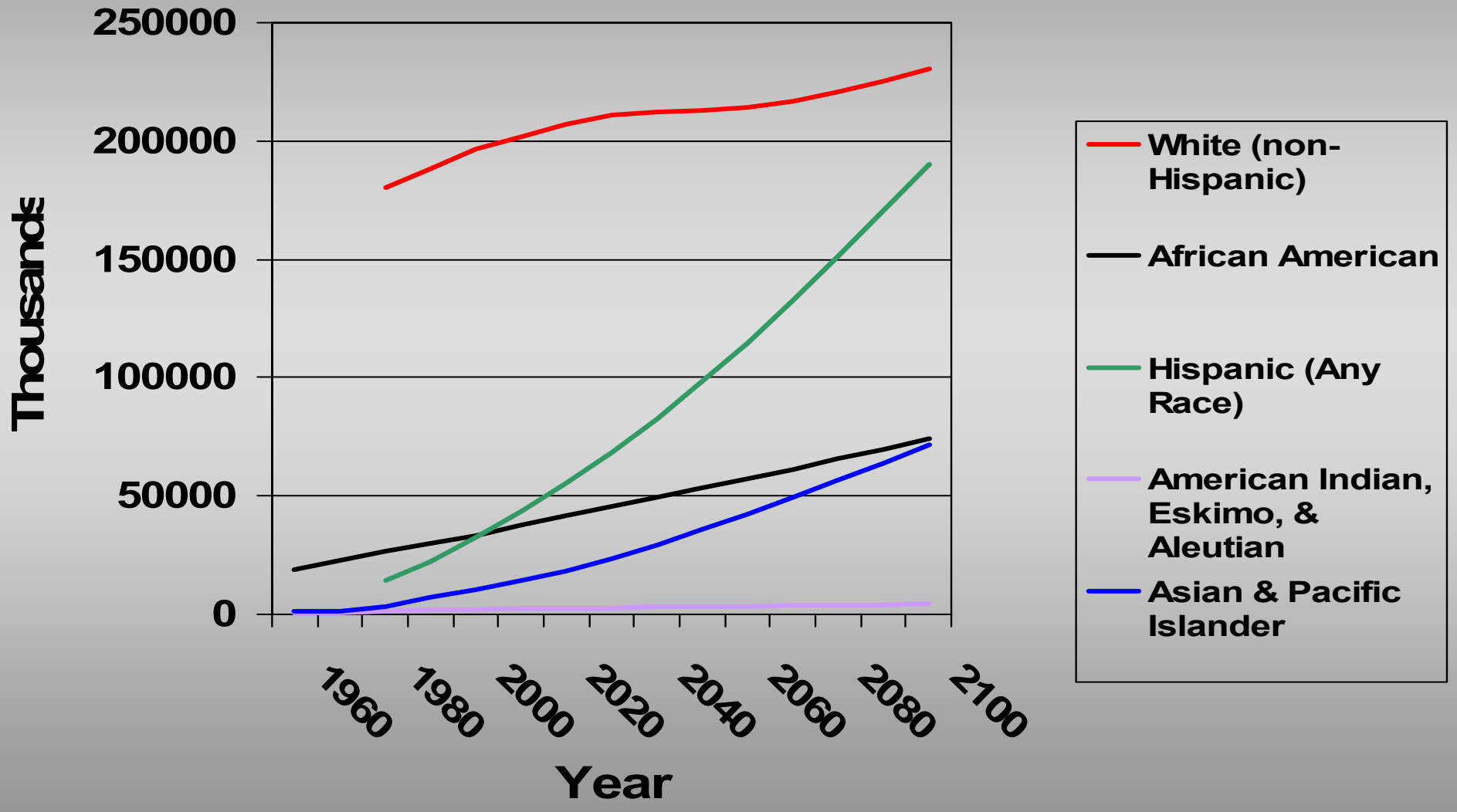


Projected net migration to the US, 1999-2100, under alternative low, middle, and high scenarios.

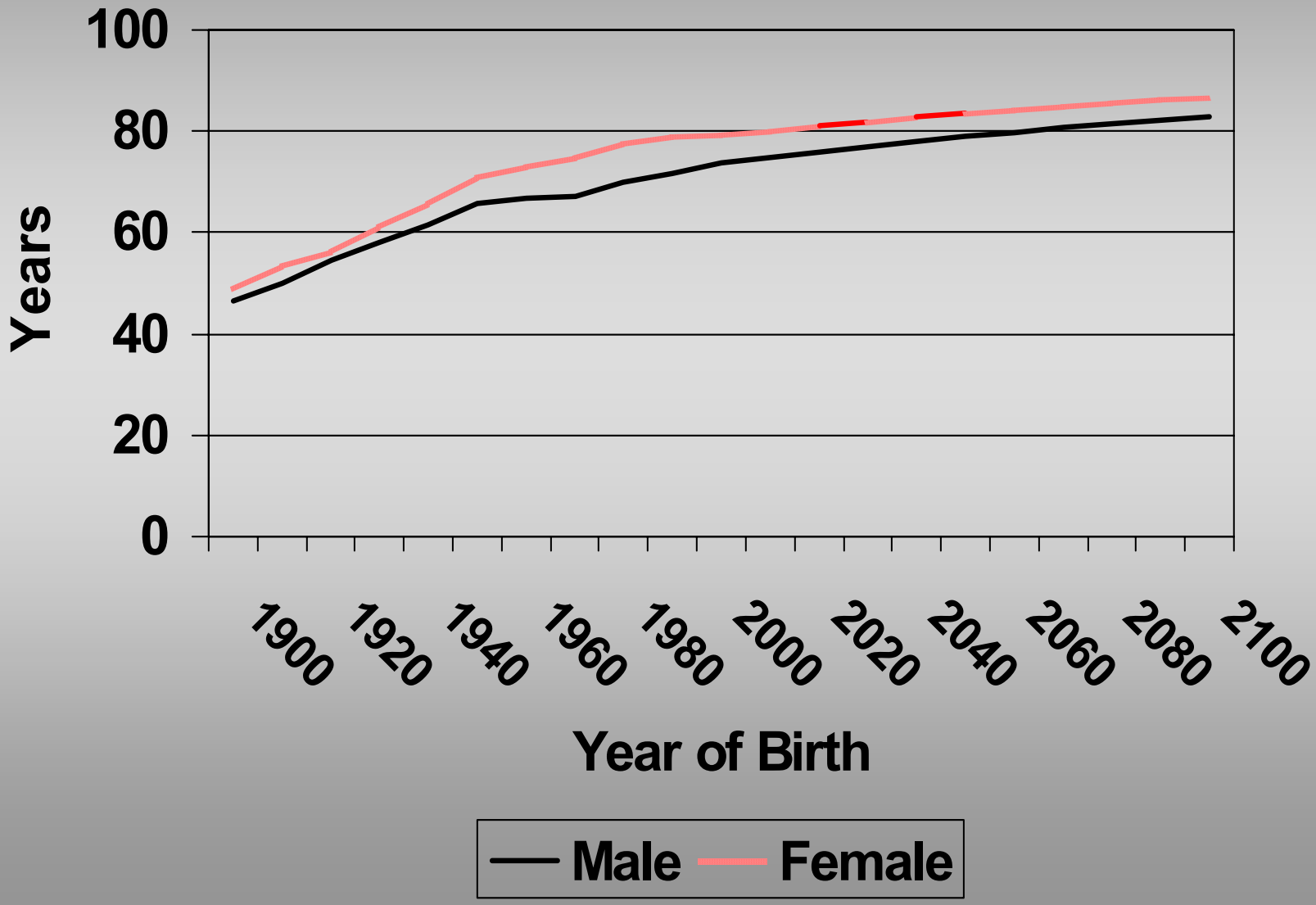
Historical and Projected Population in the U.S.



Historic and Projected Population by Ethnicity



Life Expectancy



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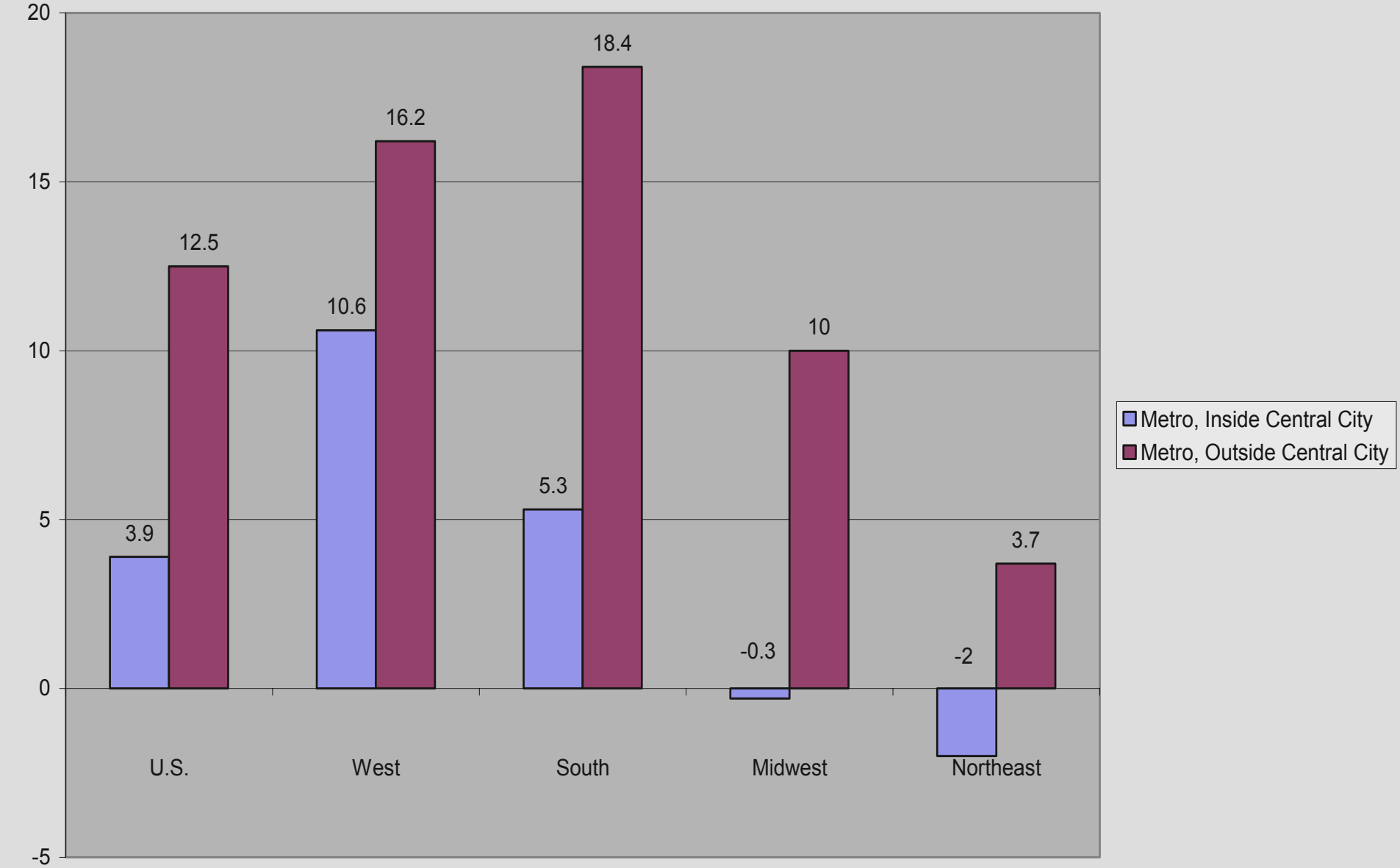
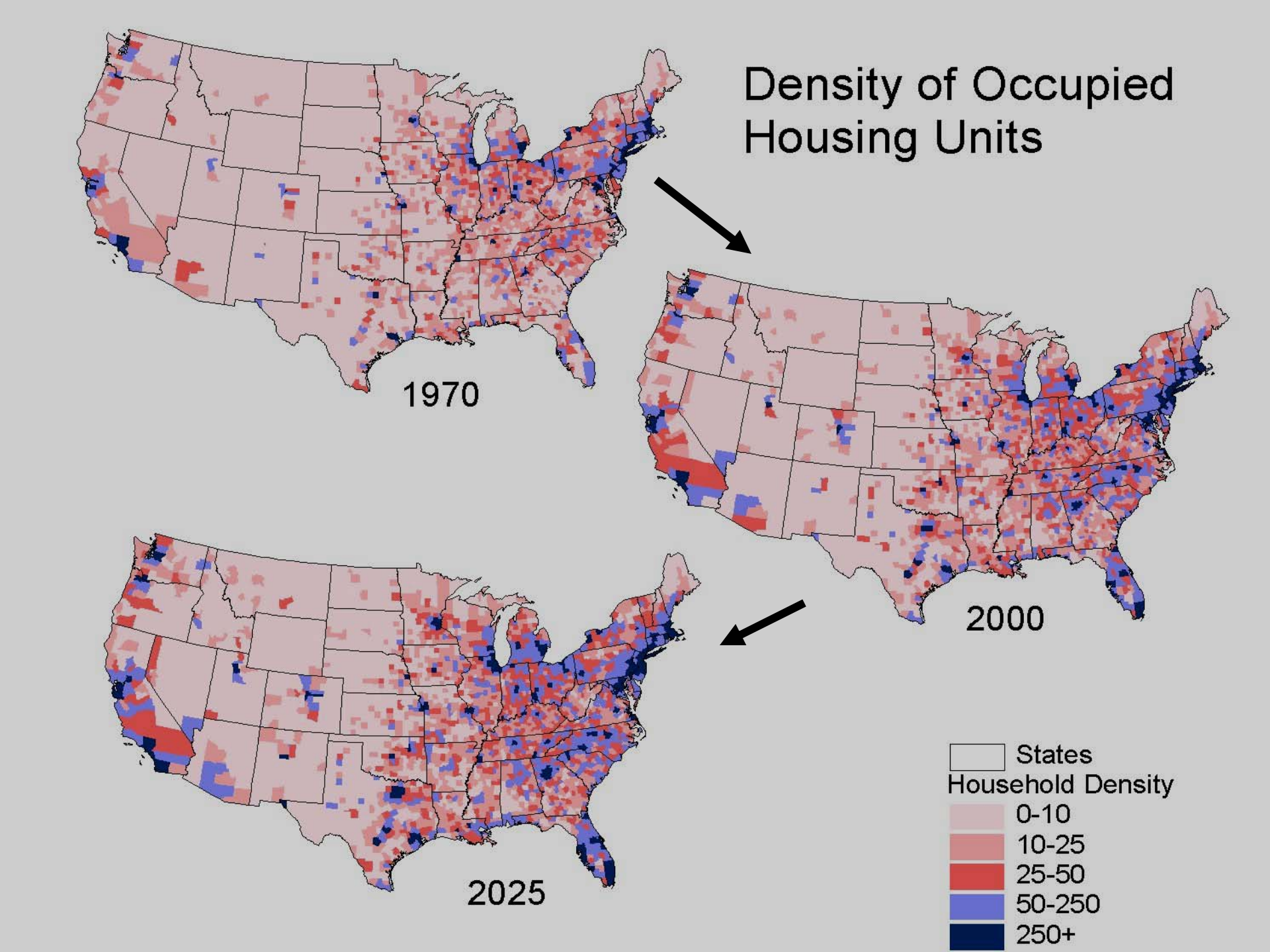
Description of the Area Within ½ Mile of Where People Live

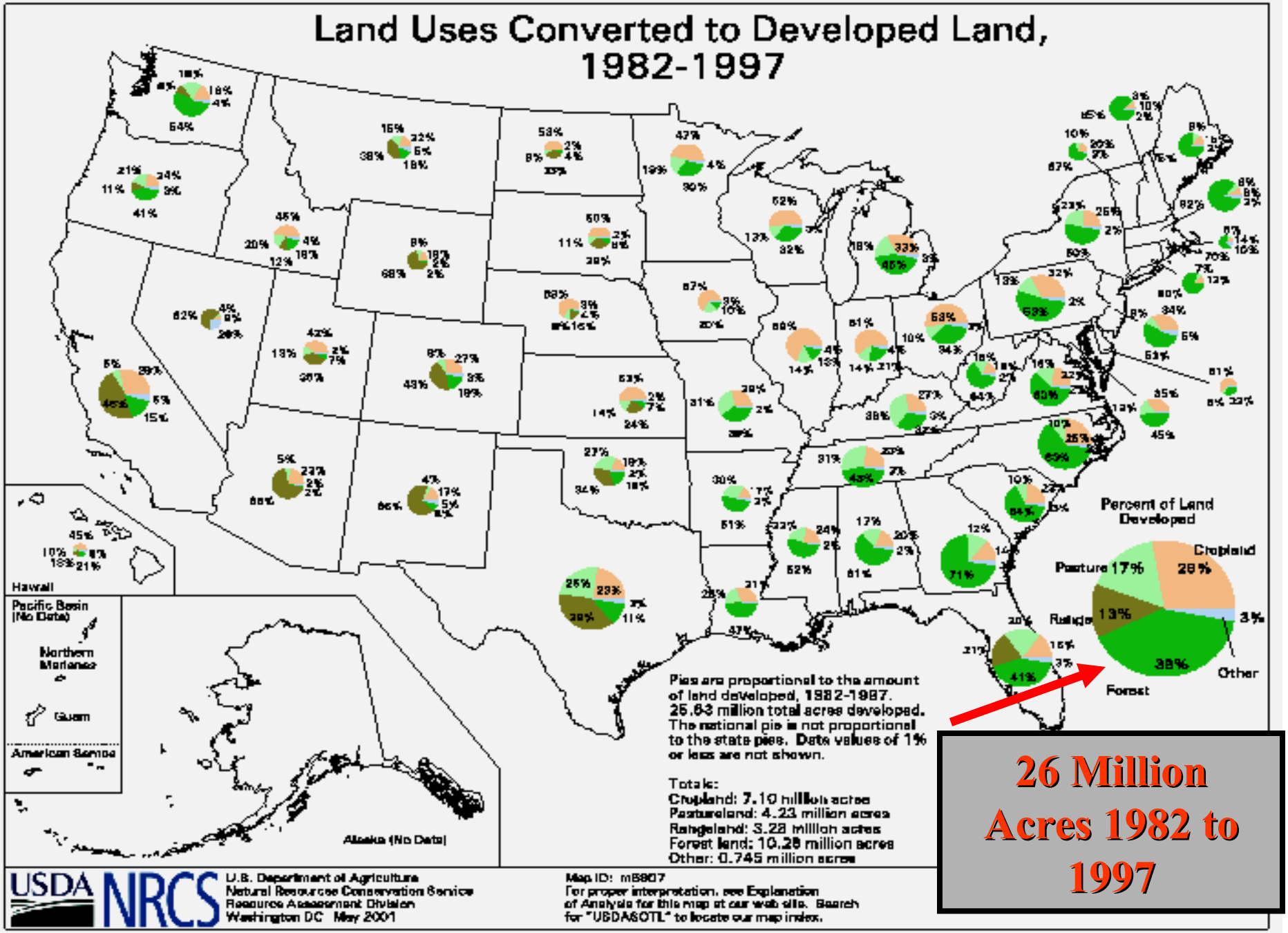
Description of Area	U.S. (n=4988)	North (n=2098)	South (n=1342)	Rocky Mtns. (n=932)	Pacific Coast (n=616)
	(Percent of Population)				
Established downtown area	9.2	9.7	8.6	8.6	9.6
Established older residential area near downtown	24.9	26.5	20.7	22.0	31.2
Established newer residential area	14.5	14.3	13.9	17.9	12.7
Newly developing area where building is active	9.9	7.6	11.8	11.5	11.0
New residential mixed with existing rural houses and farms	16.9	17.9	17.6	15.3	14.7
Rural area with little new development	21.1	20.0	24.1	21.4	18.3
Don't know	3.5	4.0	3.3	3.3	2.5
Total	100.0	100.0	100.0	100.0	100.00

Percentage Change in Metro Populations Inside and Outside of Central Cities: 1990 to 1998




Density of Occupied Housing Units
1970
2000
2025
States
Household Density
0-10
10-25
25-50
50-250
250+

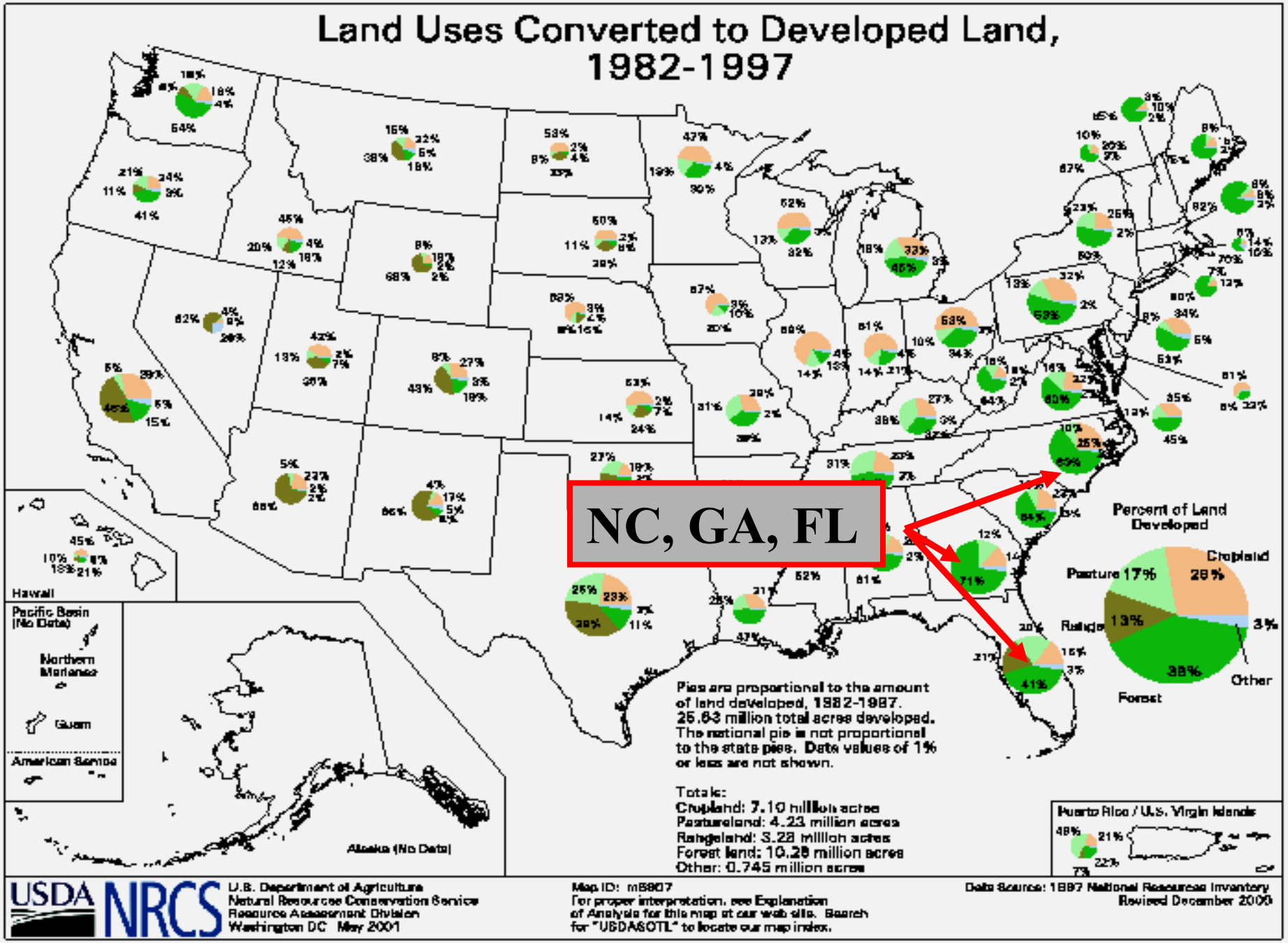
Land Uses Converted to Developed Land, 1982-1997



26 Million Acres 1982 to 1997

USDA NRCS
U.S. Department of Agriculture
Natural Resources Conservation Service
Resource Assessment Division
Washington DC May 2001

Map ID: nr8907
For proper interpretation, see Explanation of Analysis for this map at our web site. Search for "USDA&OTL" to locate our map index.


Land Uses Converted to Developed Land, 1982-1997
NC, GA, FL
Percent of Land Developed
Cropland
Pasture 17%
28%
Rangeland
13%
3%
38%
Other
Forest
Pies are proportional to the amount of land developed, 1982-1997.
25.63 million total acres developed.
The national pie is not proportional to the state pies. Data values of 1% or less are not shown.
Totals:
Cropland: 7.19 million acres
Pastureland: 4.23 million acres
Rangeland: 3.28 million acres
Forest land: 10.28 million acres
Other: 0.745 million acres
Hawaii
Pacific Basin (No Data)
Northern Marianas
Guam
American Samoa
Alaska (No Data)
Puerto Rico / U.S. Virgin Islands
USDA NRCS
U.S. Department of Agriculture
Natural Resource Conservation Service
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Map ID: m8807
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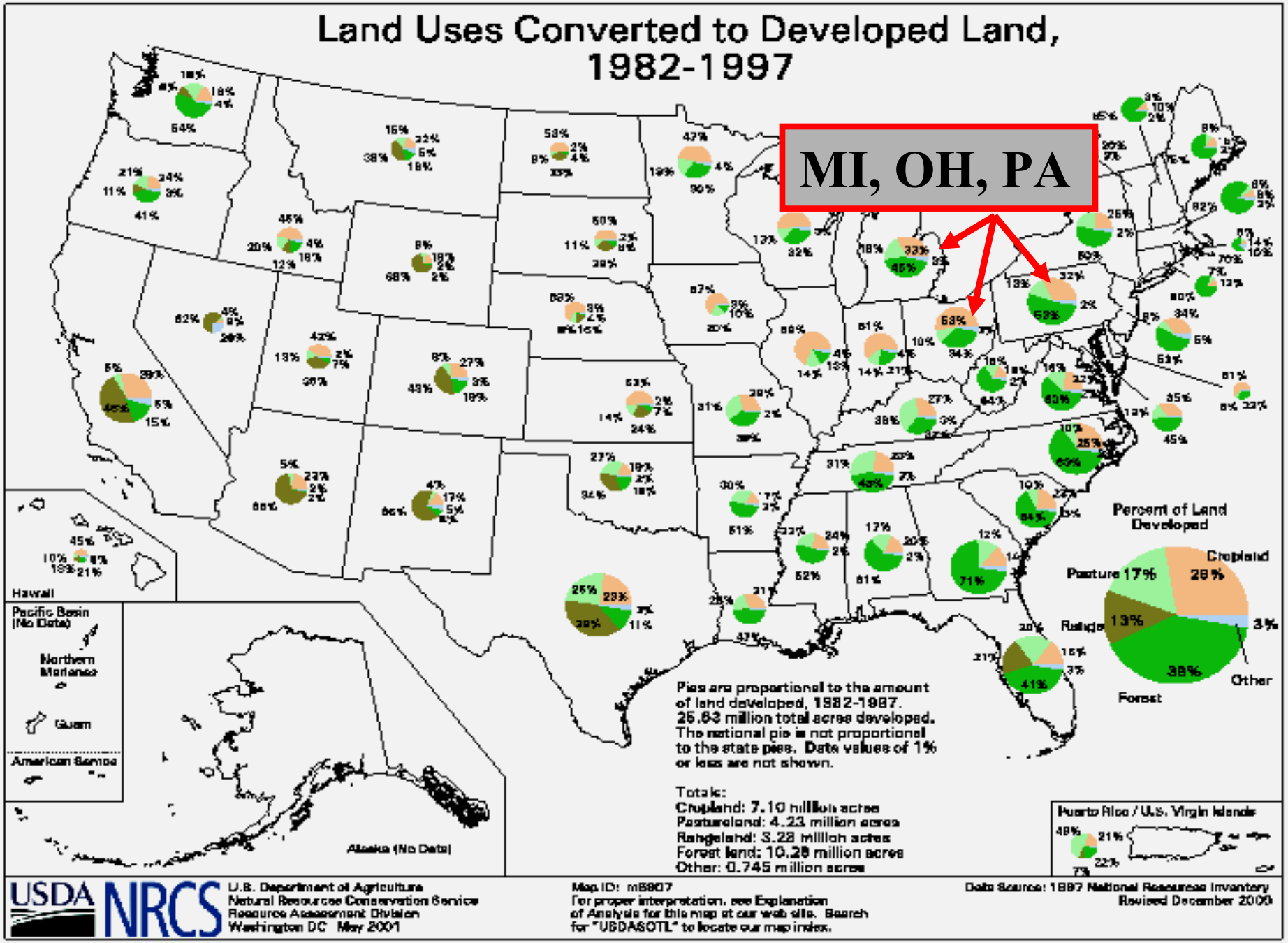
Data Source: 1997 National Resources Inventory
Revised December 2000


Land Uses Converted to Developed Land, 1982-1997
MI, OH, PA
Percent of Land Developed
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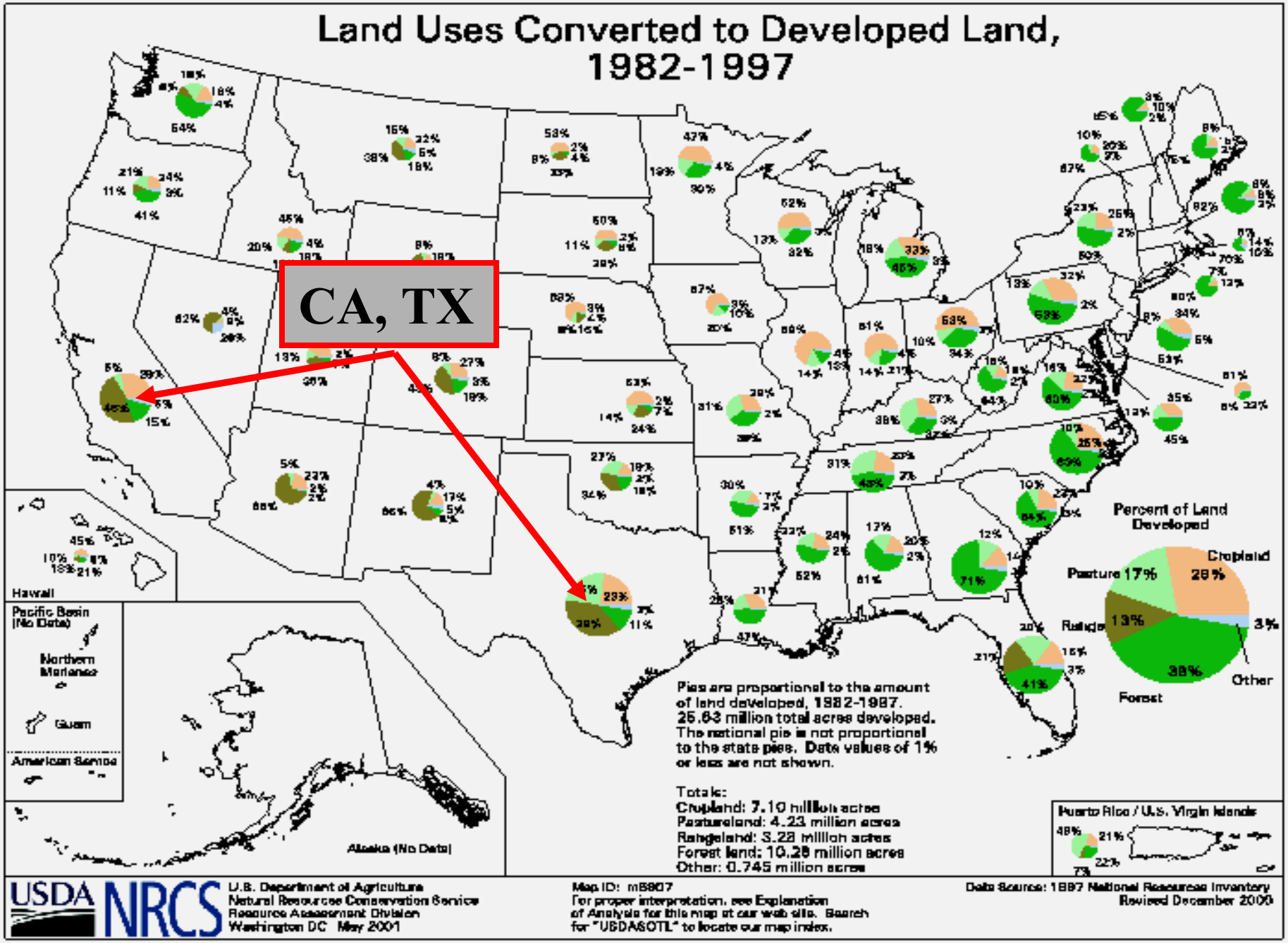
Land Uses Converted to Developed Land, 1982-1997
CA, TX
Percent of Land Developed
Cropland
Pasture 17%
28%
Rangeland
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Other
Forest
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GROWTH HOTSPOTS

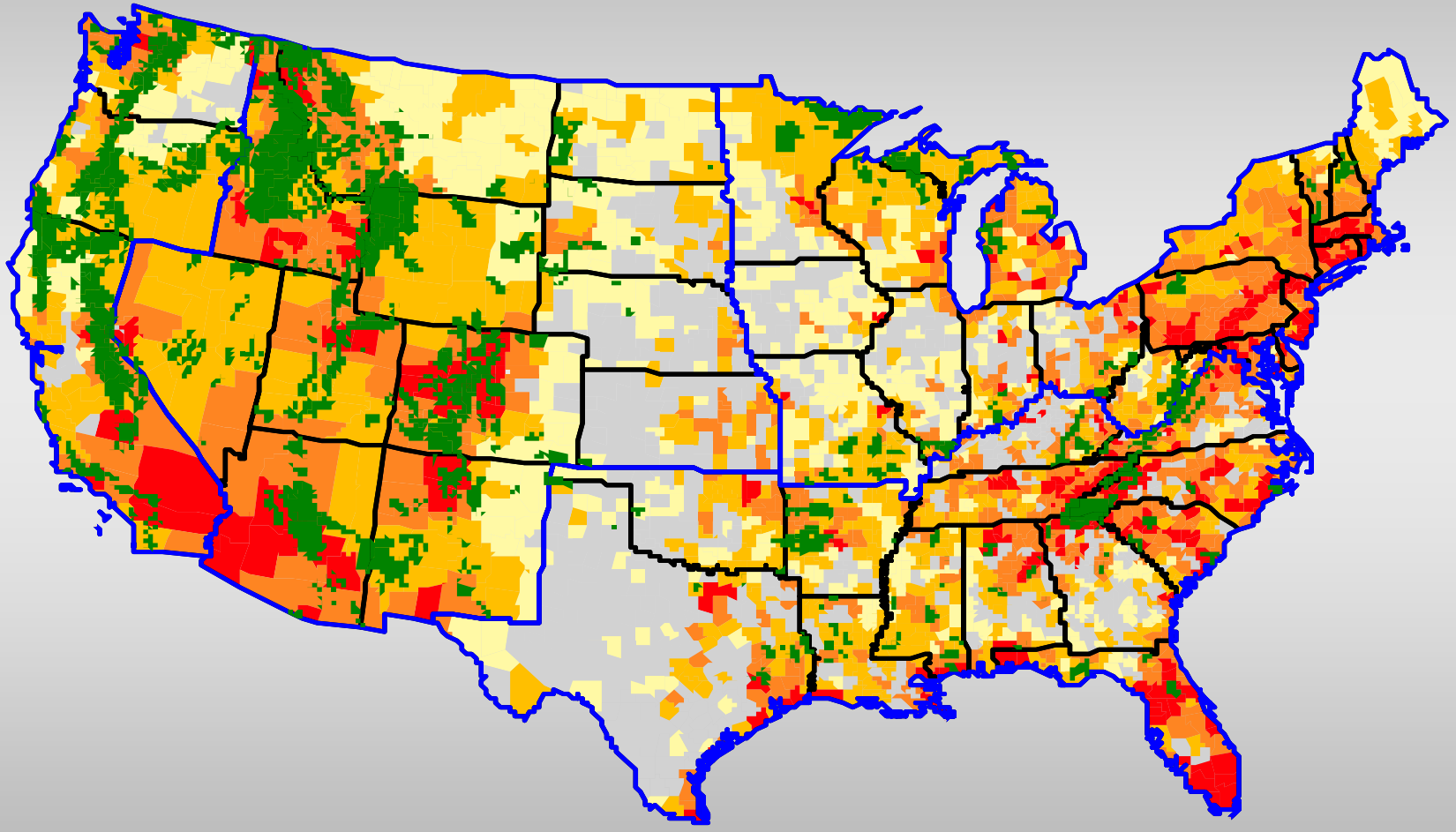

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Figure 3. Real GDP Per Capita Over Time

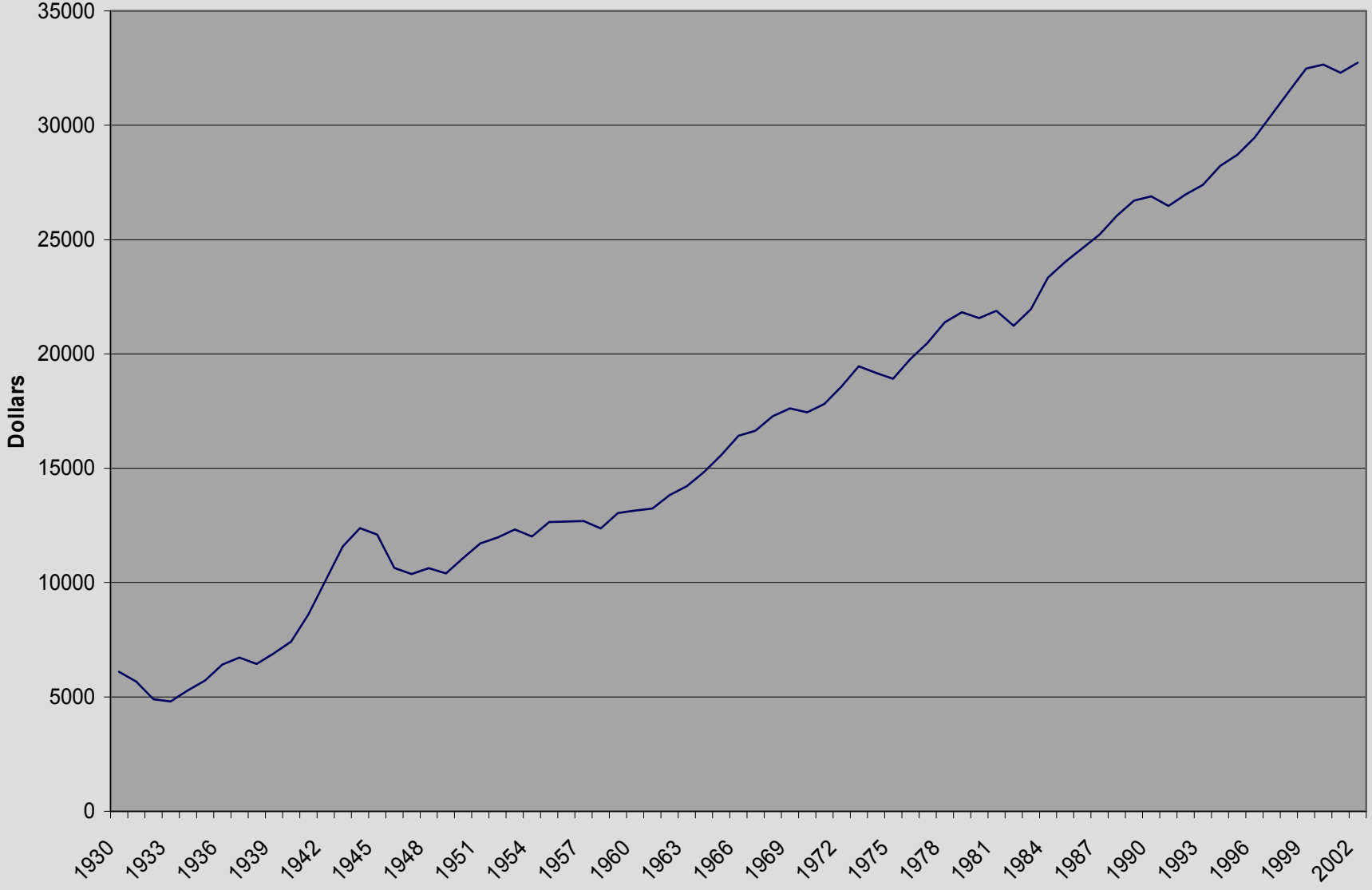


Figure 6. Real Per Capita Personal Consumption Expenditures Over Time

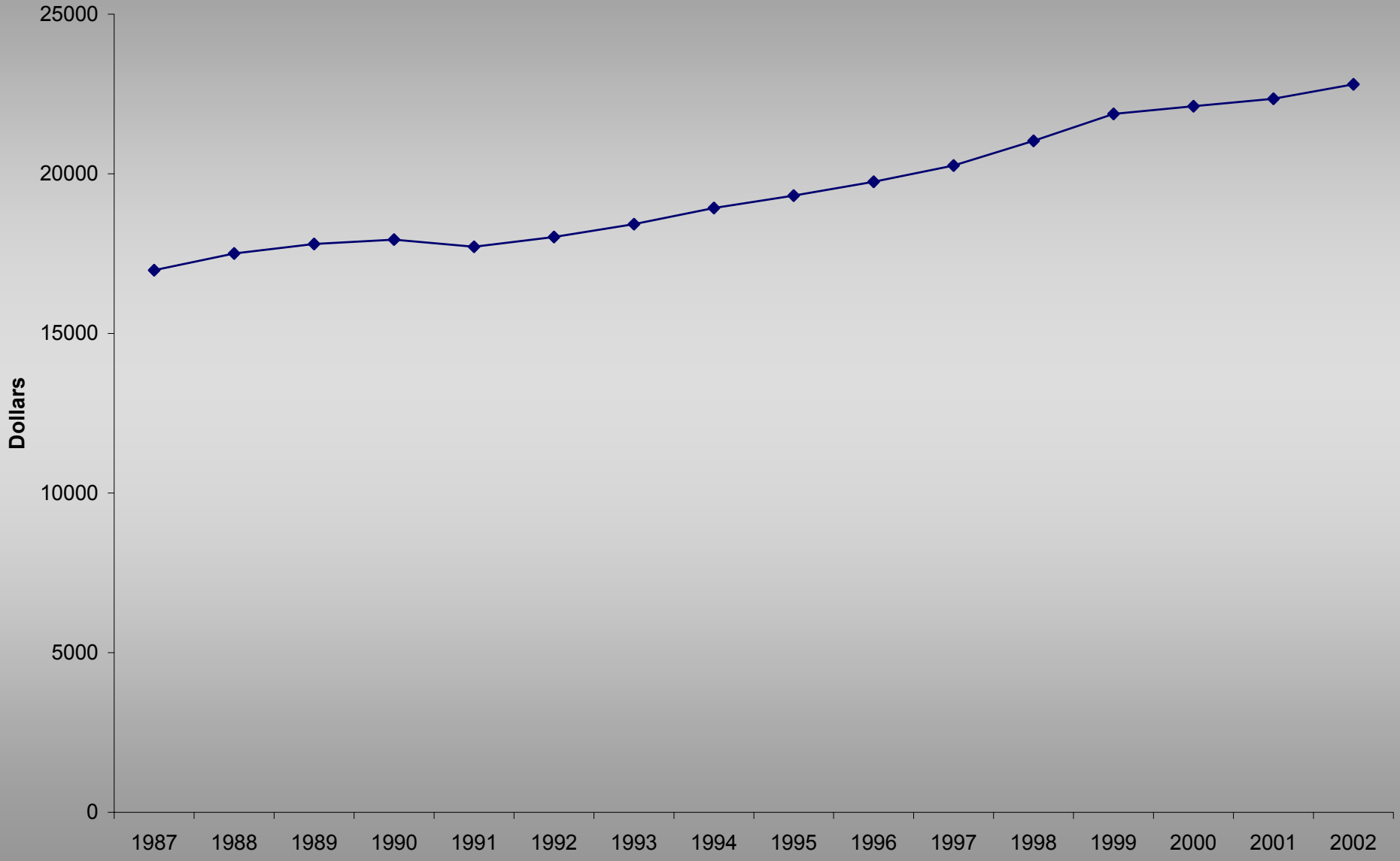
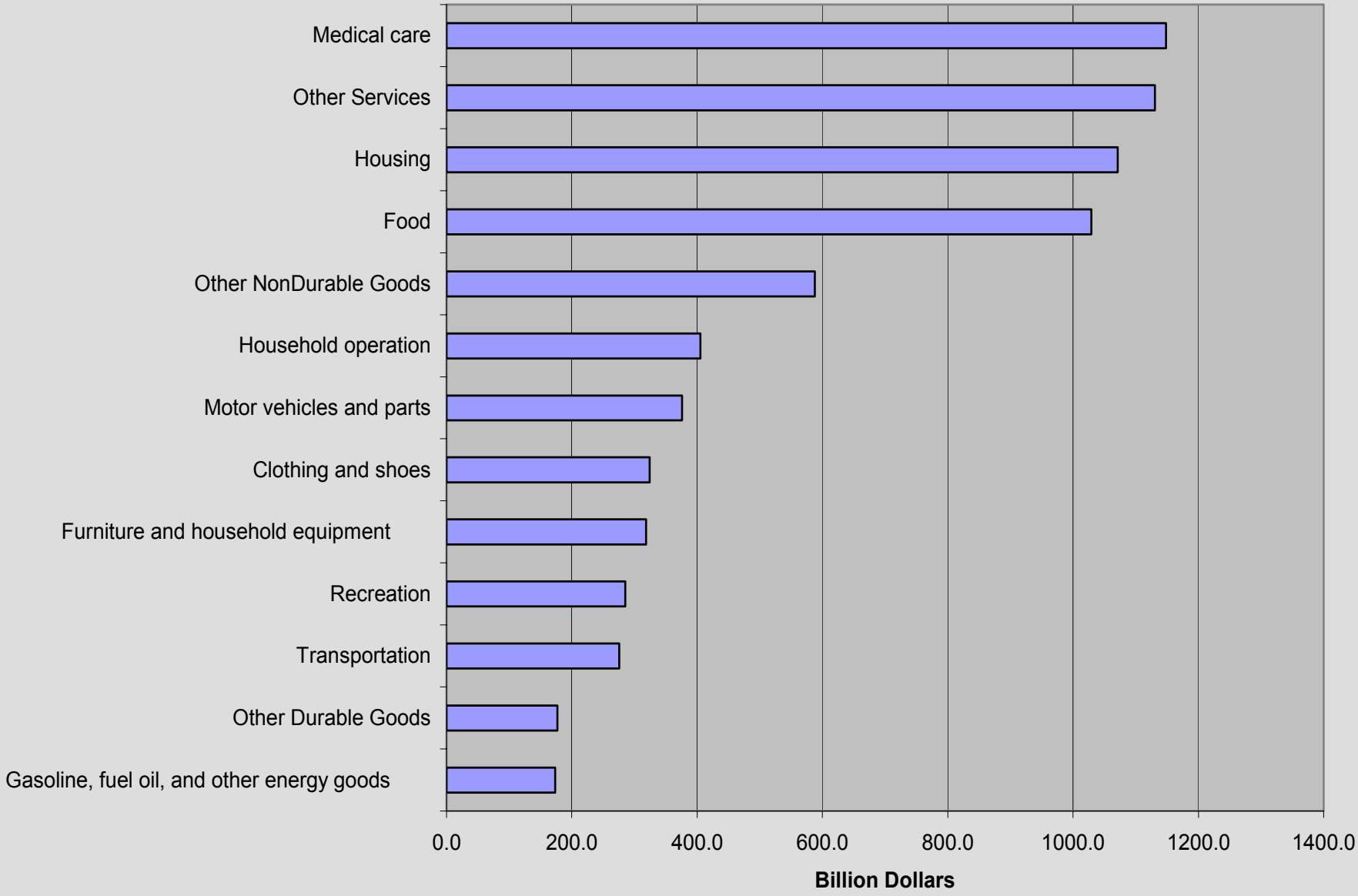
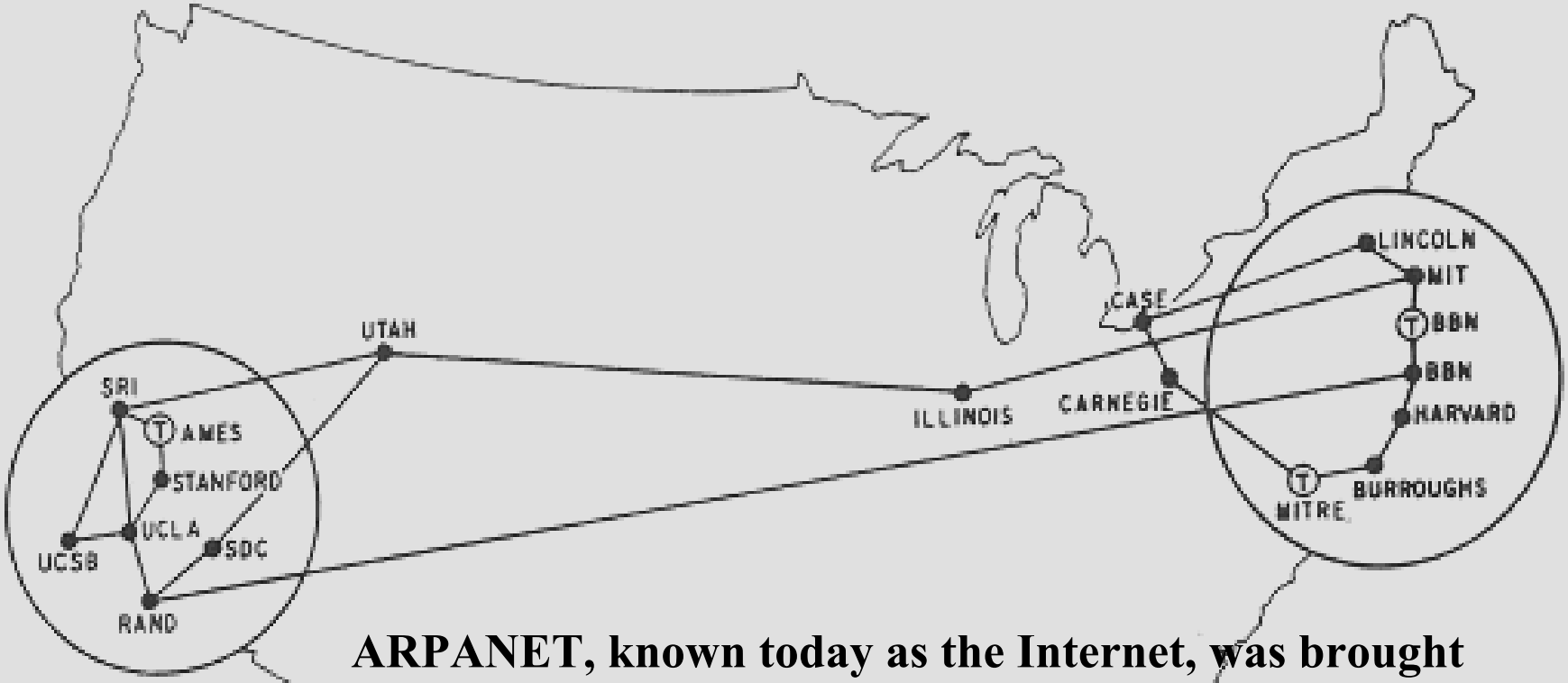


Figure 9. Personal Consumption Expenditures, Detailed Components: 2002 Current Dollars





ARPANET, known today as the Internet, was brought online in December 1969, when it initially connected four major computers at universities in the southwestern US (UCLA, Stanford Research Institute, UCSB, and the University of Utah). By January 1971, MIT, Harvard, BBN, Systems Development Corp, Stanford, MIT's Lincoln Labs, Carnegie-Mellon, and Case-Western Reserve University were added.

FROM THAT SMALL BEGINNING, ……..

- From that small beginning in 1969, and then growing to just a few hundred users as of 1971
- December 1995 16 million
- November 1997 76 million
- August 1999 195 million
- August 2000 369 million
- August 2001 513 million

Web Sites in 95 (25,000) Web Sites in 2001 (28,200,000)

NUMBER OF USERS AS OF 9-22-02

World Total	605.60 million
Africa	6.31 million
Asia/Pacific	187.24 million
Europe	190.91 million
Middle East	5.12 million
Canada & USA	182.67 million
Latin America	33.35 million

http://www.nua.com/surveys/how_many_online/

Web | Images | Groups | Directory | News

- Advanced Search
- Preferences
- Language Tools

New! The free Google Toolbar blocks pop-ups. Search from anywhere!

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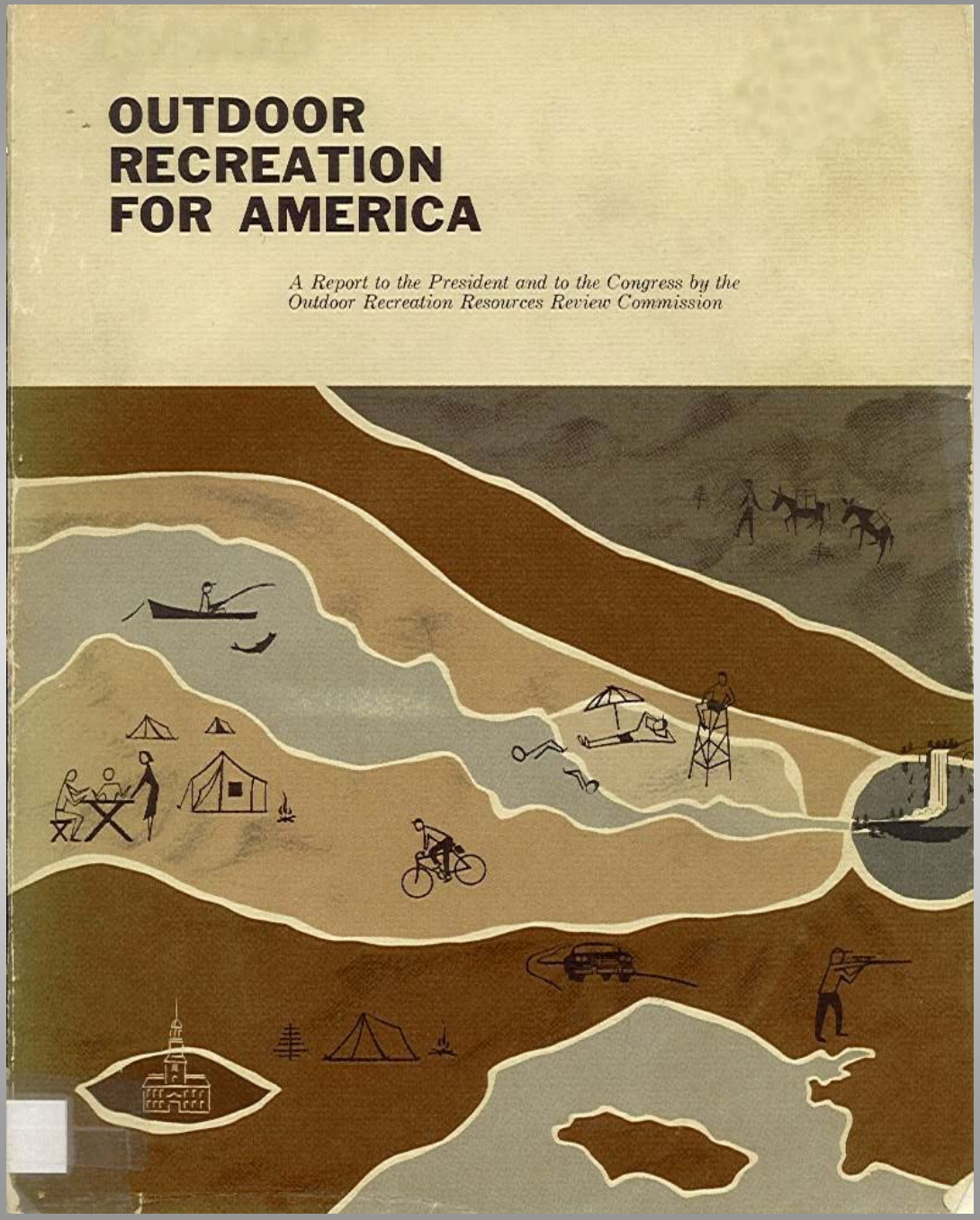
The first major national assessment in the United States—The Outdoor Recreation Resources Review Commission (1960)



The last of the Nationwide Recreation Surveys was conducted by the Park Service in 1982-83. Previous ones had been conducted by BOR and HCRS in 1965, 1972, and 1977.

1982-1983 Nationwide Recreation Survey

U.S. Department of the Interior
NATIONAL PARK SERVICE

NSRE

NATIONAL SURVEY ON RECREATION AND THE ENVIRONMENT

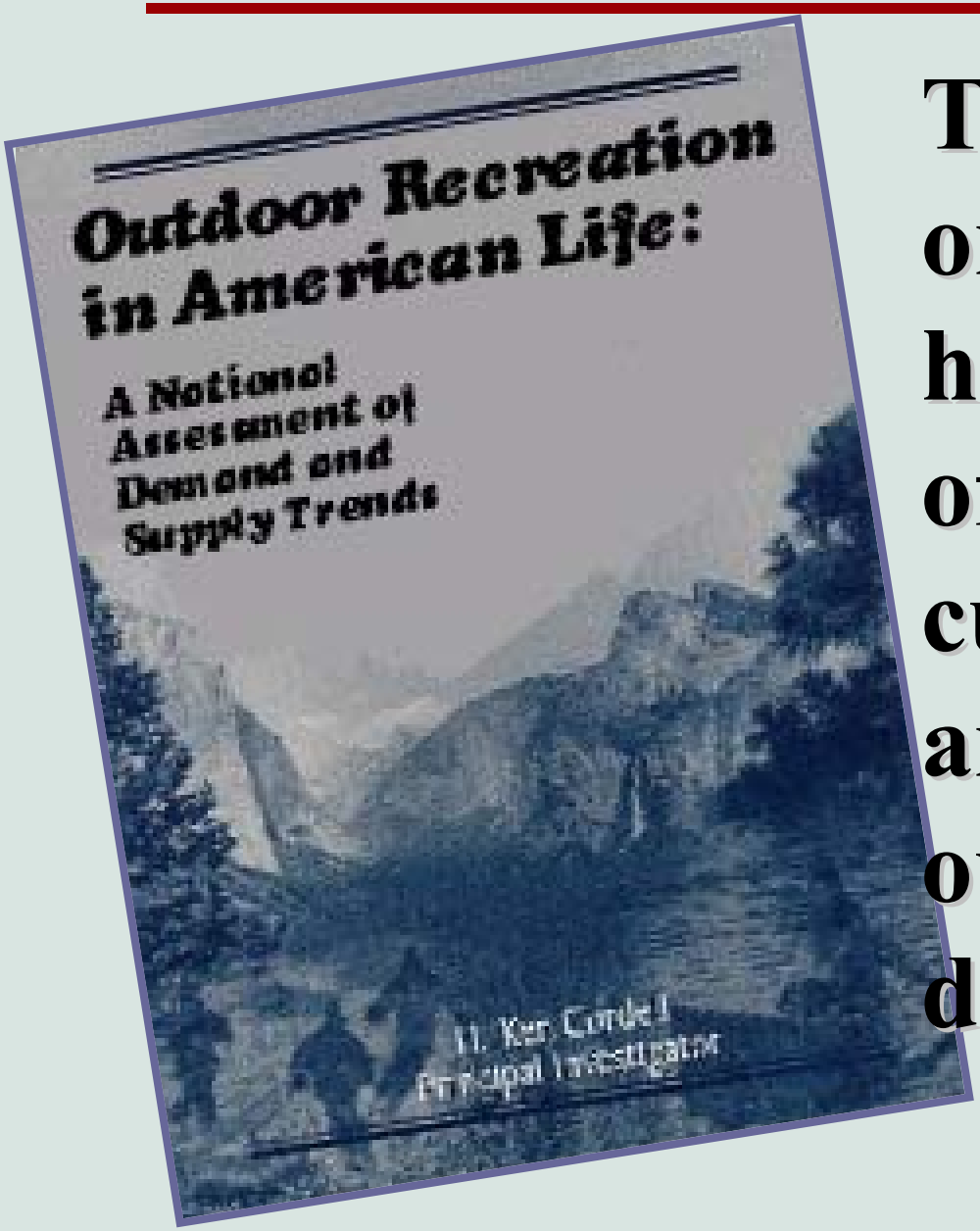
SINCE 1960

THE UNITED STATES' ON-GOING NATIONAL RECREATION AND ENVIRONMENTAL SURVEY

NSRE

- A sample of over 85,000+ households, from the Keys to the Artic National Wildlife Refuge
- Forest Service Research manages the survey
- Includes non-institutionalized individuals 16 or older
- Is the Nation's on-going recreation and environmental survey, the 8th coming next year
- Interagency sponsorship—USFS, NOAA, CDC, ERS, EPA, NPS, BLM.
- Others involved, NFs in the South, National Scenic Byways, Heritage, Wilderness, Numerous State Agencies, Bicycle Safety, Campaign for America's Wilderness, NRCS, Montreal Process, …..

Outdoor Recreation in American Life



The United States' on-going, comprehensive assessment of the trends, current situation, and likely future of outdoor recreation demand and supply.

(1999)

Spring 2004

Outdoor Recreation for 21st Century America

Cordell
Principal Author

VENTURE

Outdoor Recreation for 21st Century America

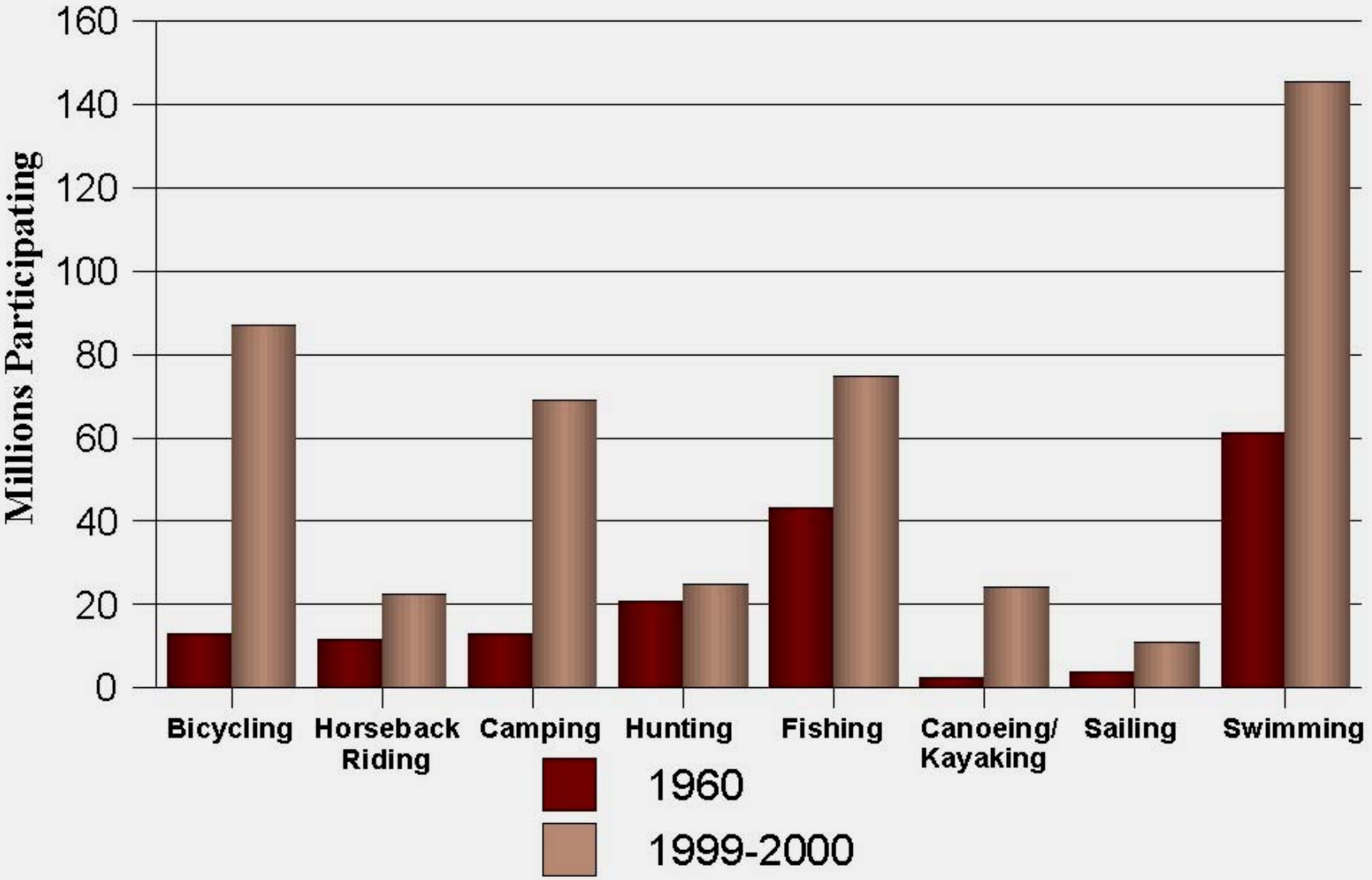
A Report to the Nation: The National Survey on Recreation and the Environment

H. Ken Cordell
Principal Author

Outdoor Recreation for 21st Century America--Contents

LONG-TERM TRENDS

LONG TERM TRENDS SINCE 1960



RECENT TRENDS

Ten Most Popular Activities in 2001 and in 1994-95

Activities	Percent of Population 16+ Participating in 2000-01	Rank Order of Popularity 1994-95	Percent of Population in 1994-95
Walking for pleasure	83.1	1	66.7
Family gatherings	73.6	3	61.8
Visiting a beach	60.7	2	62.1
Visiting nature centers	57.4	**8**	46.5
Picnicking	54.7	5	49.1
Sightseeing	52.1	4	56.6
Attending outdoor sports events	49.9	7	47.5
Visiting historic sites	46.3	9	44.1
Viewing wildlife	44.7	**	31.2
Swimming in lakes, streams, etc.	42.1	10	39.0

** Pool swimming was number 6 in 1994-95, but has since been replaced by viewing wildlife as one of the top 10 in 2000-01.

Activity Growth in order of Added Number Participating

GREATEST GROWTH

- Walk for pleasure #1
- Family gathering
- View wildlife
- Visit nature centers
- Bicycling
- View/photograph fish
- Day hiking
- Running or jogging
- Picnicking
- Attend outdoor concerts, etc.
- View birds
- Developed camping
- Swimming in natural waters
- Attend outdoor sports events
- Visit historic sites

MODERATE

- Sledding
- Jet skiing
- Visit arch. sites
- Drive off-road
- Coldwater fishing
- Warmwater fishing
- Soccer outdoors
- Backpacking
- Visit beach or waterside
- Horseback riding
- Canoeing
- Primitive camping
- Motorboating
- Snowboarding
- Whitewater Rafting

LEAST GROWTH

- Snowmobiling
- Kayaking
- Ice skating outdoors
- Mountain climbing
- Big game hunting
- Saltwater fishing
- Small game hunting
- Rock climbing
- Downhill skiing
- Cross country skiing
- Sailing
- Snorkeling or scuba diving
- Rowing
- Migratory bird hunting
- Surfing
- Pool swimming
- Anadromous fishing
- Caving

Activity Growth in order of Added Number Participating

GREATEST GROWTH

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- View wildlife
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- Soccer outdoors
- Backpacking
- Visit beach or waterside
- Horseback riding
- Canoeing
- Primitive camping
- Motorboating
- Snowboarding
- Whitewater Rafting

LEAST GROWTH

- Snowmobiling
- Kayaking
- Ice skating outdoors
- Mountain climbing
- Big game hunting
- Saltwater fishing
- Small game hunting
- Rock climbing
- Downhill skiing
- Cross country skiing
- Sailing
- Snorkeling or scuba diving
- Rowing
- Migratory bird hunting
- Surfing
- Pool swimming
- Anadromous fishing
- Caving

Activity Growth in order of Added Number Participating

GREATEST GROWTH

- Walk for pleasure #1
- Family gathering
- View wildlife
- Visit nature centers
- Bicycling
- View/photograph fish
- Day hiking
- Running or jogging
- Picnicking
- Attend outdoor concerts, etc.
- View birds
- Developed camping
- Swimming in natural waters
- Attend outdoor sports events
- Visit historic sites

MODERATE

- Sledding
- Jet skiing
- Visit arch. sites
- Drive off-road
- Coldwater fishing
- Warmwater fishing
- Soccer outdoors
- Backpacking
- Visit beach or waterside
- Horseback riding
- Canoeing
- Primitive camping
- Motorboating
- Snowboarding
- Whitewater Rafting

LEAST GROWTH

- Snowmobiling
- Kayaking
- Ice skating outdoors
- Mountain climbing
- Big game hunting
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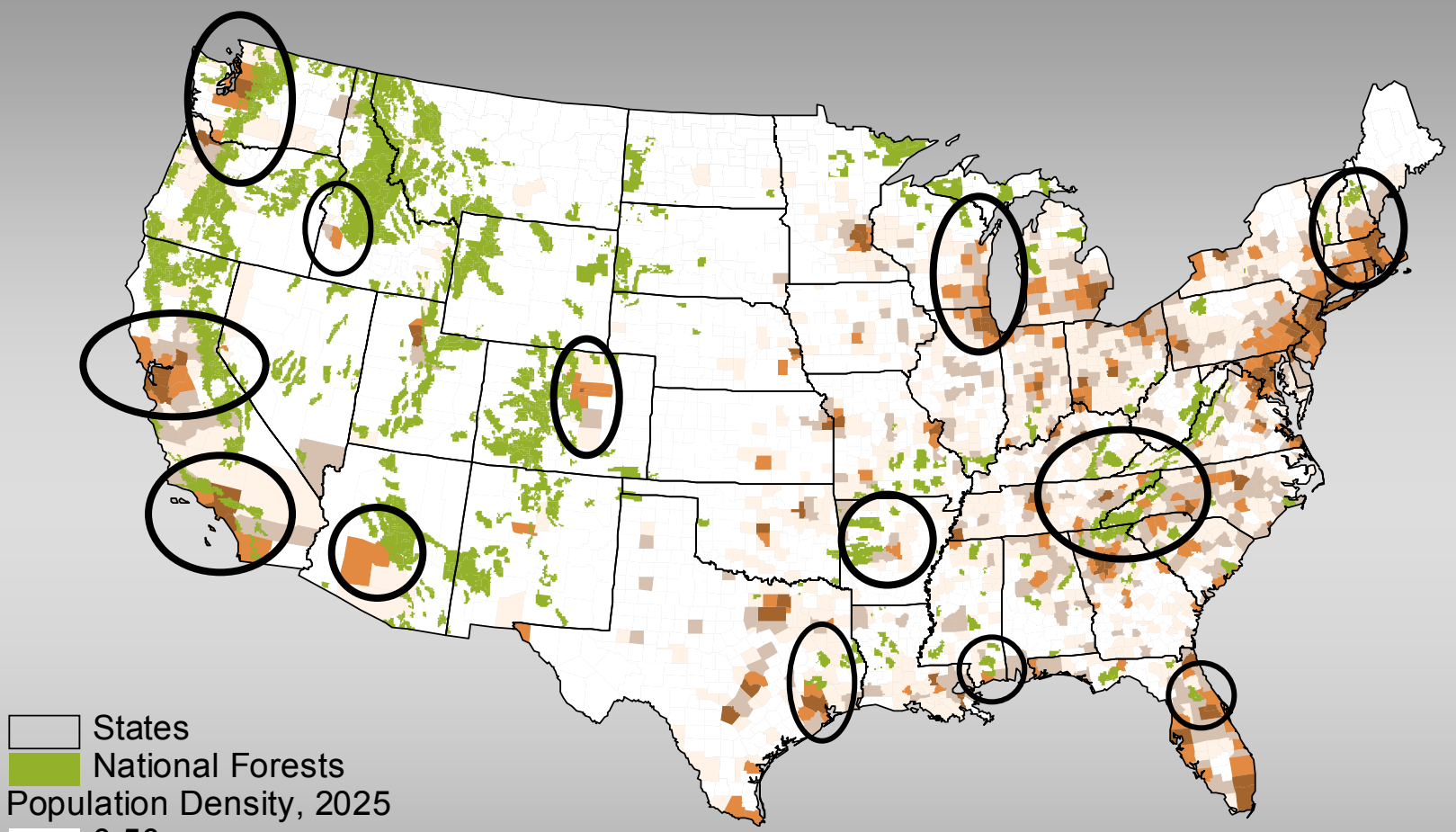
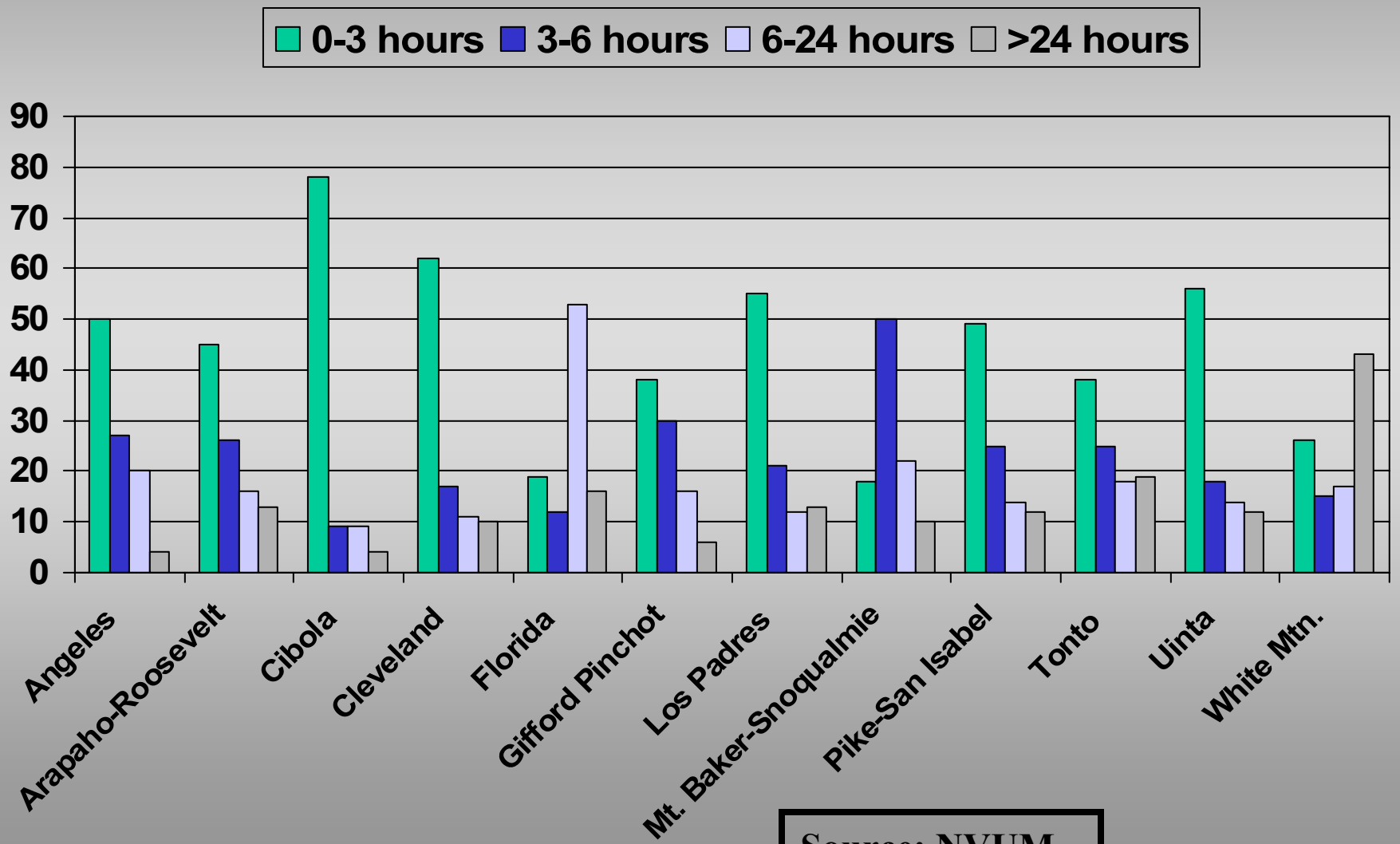


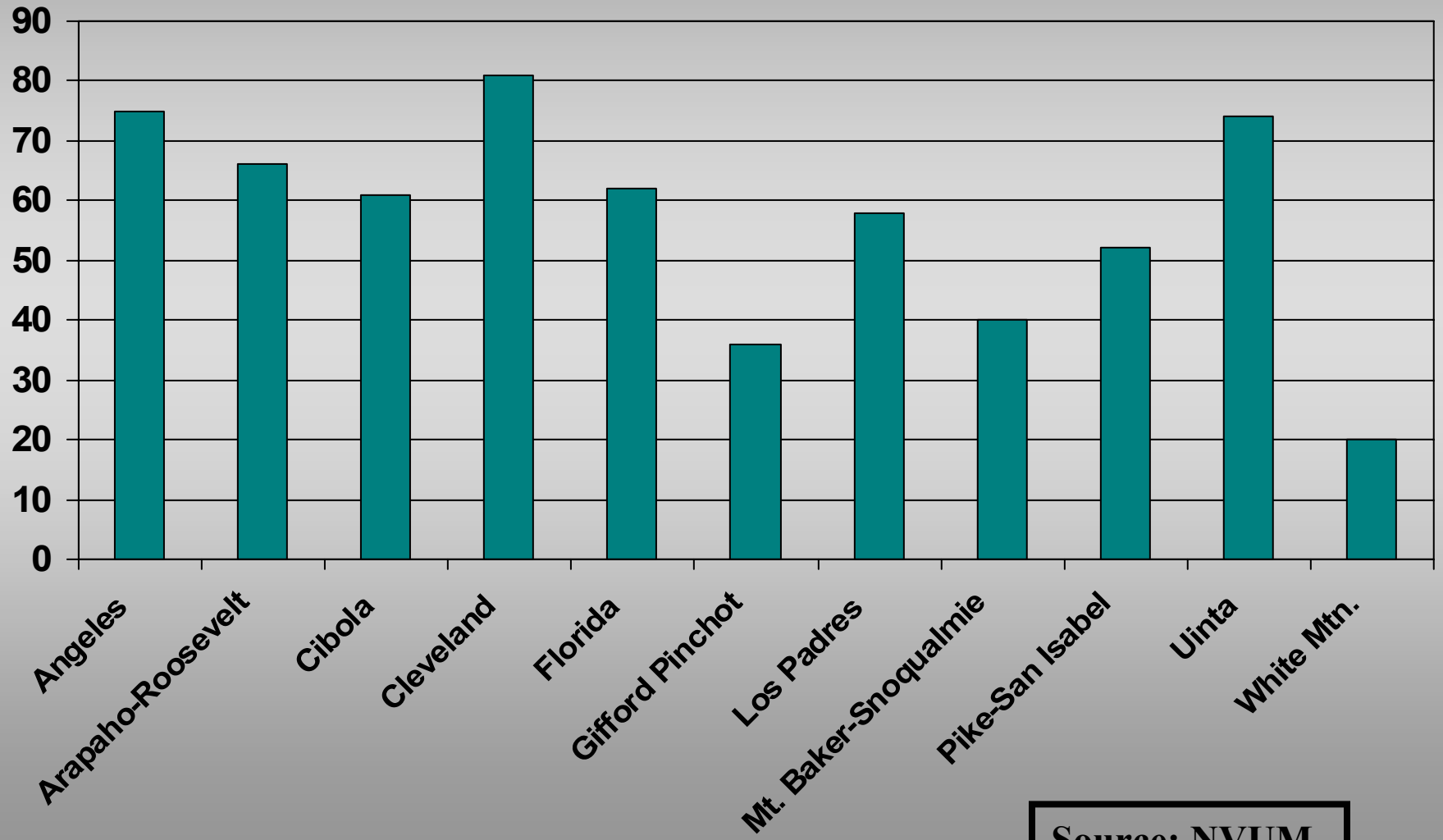
Spatial Relationship of NFs to Heavily Populated Counties 2025

Percentage of National Forest Visits by Duration for Selected Urban National Forests



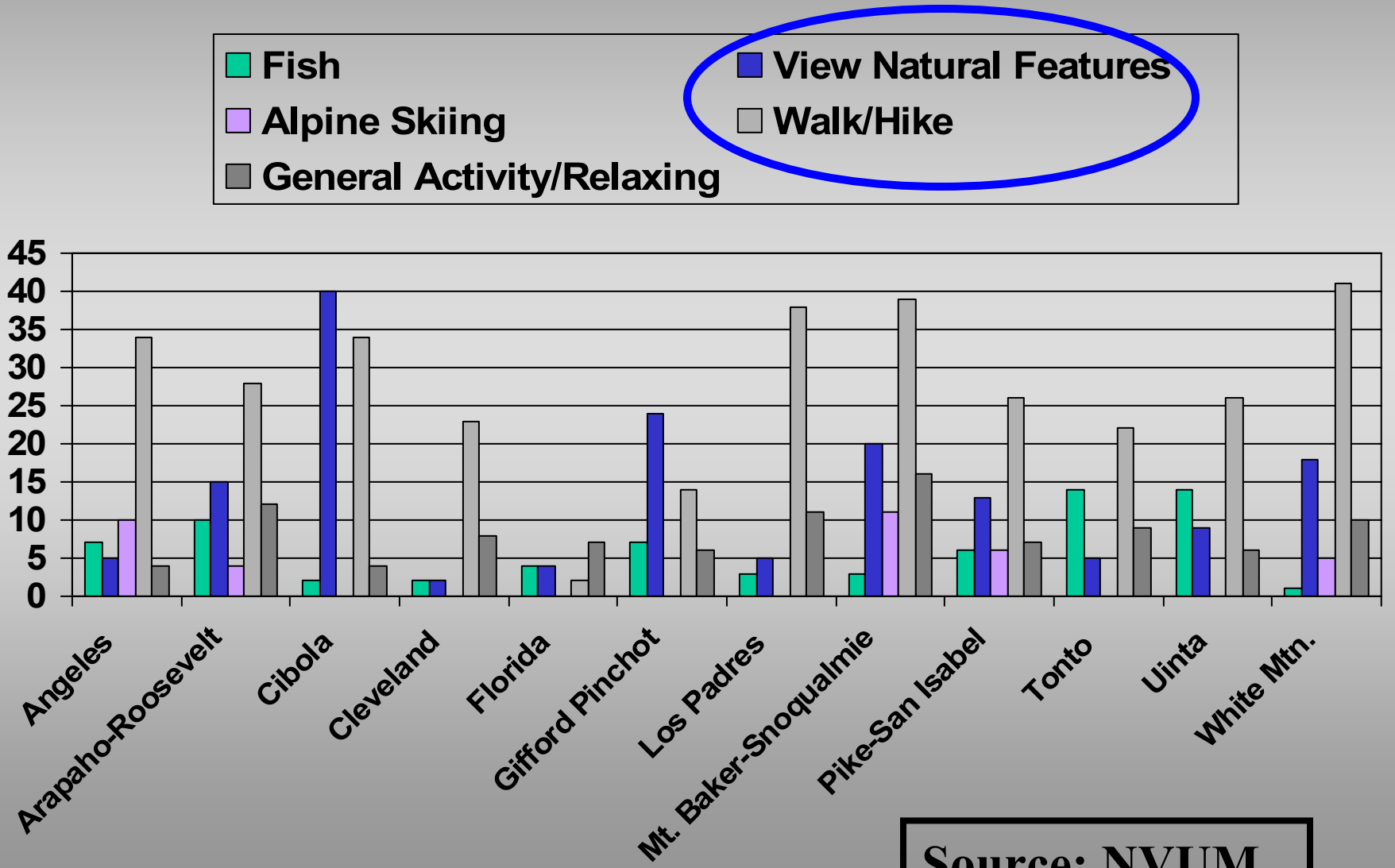
Source: NVUM

Percent of UNF Visits by Persons Living Within 50 Miles of the Forest



Source: NVUM

Percent of NF Visits by Primary Activity for Urban National Forests



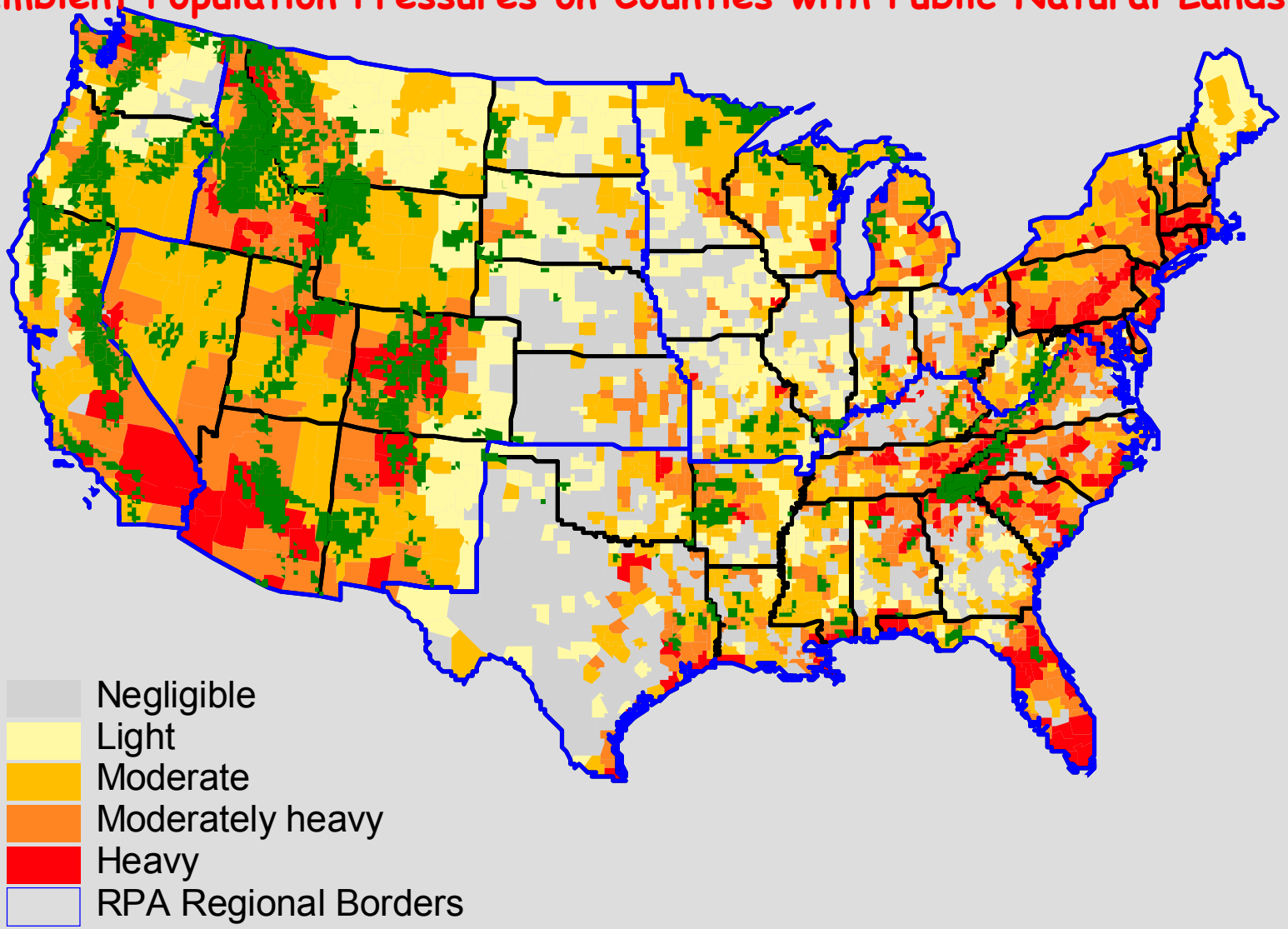
Source: NVUM

Minority Status and Gender of Visitors to Urban National Forests (NVUM data)

Forest	Hispanic	Asian	Native American	African American	Male
	Percent of National Forest visits				
Angeles	13.8	4.6	1.2	1.6	81.0
Arapaho Roosevelt	2.1	0.1	0.2	0.3	69.0
Cibola	12.1	0.5	2.5	0.4	65.0
Cleveland	12.8	8.8	2.3	0.3	76.8
Florida	2.1	0.9	0.0	6.0	74.3
Gifford Pinchot	0.1	1.1	0.4	0.8	66.6
Los Padres	22.9	0.3	1.7	0.1	72.1
Mt. Baker-Snoqualmie	2.5	5.7	0.5	1.3	63.3
Pike-San Isabel	2.8	0.4	0.3	0.5	66.9
Tonto	6.0	0.3	1.4	1.0	74.7
Uinta	2.8	1.0	0.7	0.1	72.7
White Mountain	0.1	1.8	1.4	1.5	65.5

Future Public Natural Land Hotspots (2020)

Ambient Population Pressures on Counties with Public Natural Lands



INFORMED DECISIONS USING SOCIAL AND RECREATION DATA

- Population and Demographic Trends
- Urban Growth and Rural Transition
- Economic, Consumer Spending and Internet Trends
- General Public Demand (NSRE) and Outdoor Recreation on Increasingly Urban NFs (NVUM)
- Considering What the Public Values
- Summary and Discussion

Who Is That "Public" We So Often Refer To??

****

- **The public ranges from the population at large, to local communities to special interests**
- **The highest level is the public at large. For federal lands, that means the national population. (National Forests are first a National resource, second a regional or local resource, and last a special use resource (Remember?, "the greatest good for the greatest number in the long run"))**
- **The next level includes regional and local communities. (These are communities of place who have interest, usually economic, because of nearness to public lands)**
- **The third level includes a variety of special interests. (These are not place bound (they may include wilderness, motorized recreation or commercial interests)**

WHAT DOES THE UNITED STATES' PUBLIC VALUE IN OUR PUBLIC LANDS??

- Provide permits to ranchers for grazing of livestock such as cattle and sheep
- Maintain public lands for future generations to use and enjoy
- Provide access, facilities and services for outdoor recreation
- Provide quiet, natural places for personal renewal
- Use and manage public areas in ways that leave them natural in appearance
- Emphasize planting/management of trees for abundant timber supply
- Provide access to raw materials and products for local industries and communities
- Protect streams and other sources of clean water
- Protect rare, unique or endangered plant and animal species
- Provide roads, accommodations and services to help local tourism businesses
- Provide information and educational services about natural areas, their management and the natural life in them

Protect streams and other sources of clean water

Not at all important

Extremely important

1 2 3 4 5

8 Don't know

9 Refused

VALUE DIMENSION 1:
MANAGE FOR PROTECTION

- Protect streams and other sources of clean water
- Provide habitat and protection for abundant wildlife and fish
- Protect rare, unique or endangered plant and animal species

(Average Score 74.0)

VALUE DIMENSION 2:
MANAGE FOR AMENITIES

- Maintain public lands for future generations to use and enjoy
- Provide quiet, natural places for personal renewal
- Use and manage forest areas in ways that leave them natural in appearance
- Provide information and educational services about public lands, their management and the natural life in them

(Average Score = 61.6)

VALUE DIMENSION 3:

MANAGE FOR OUTPUTS

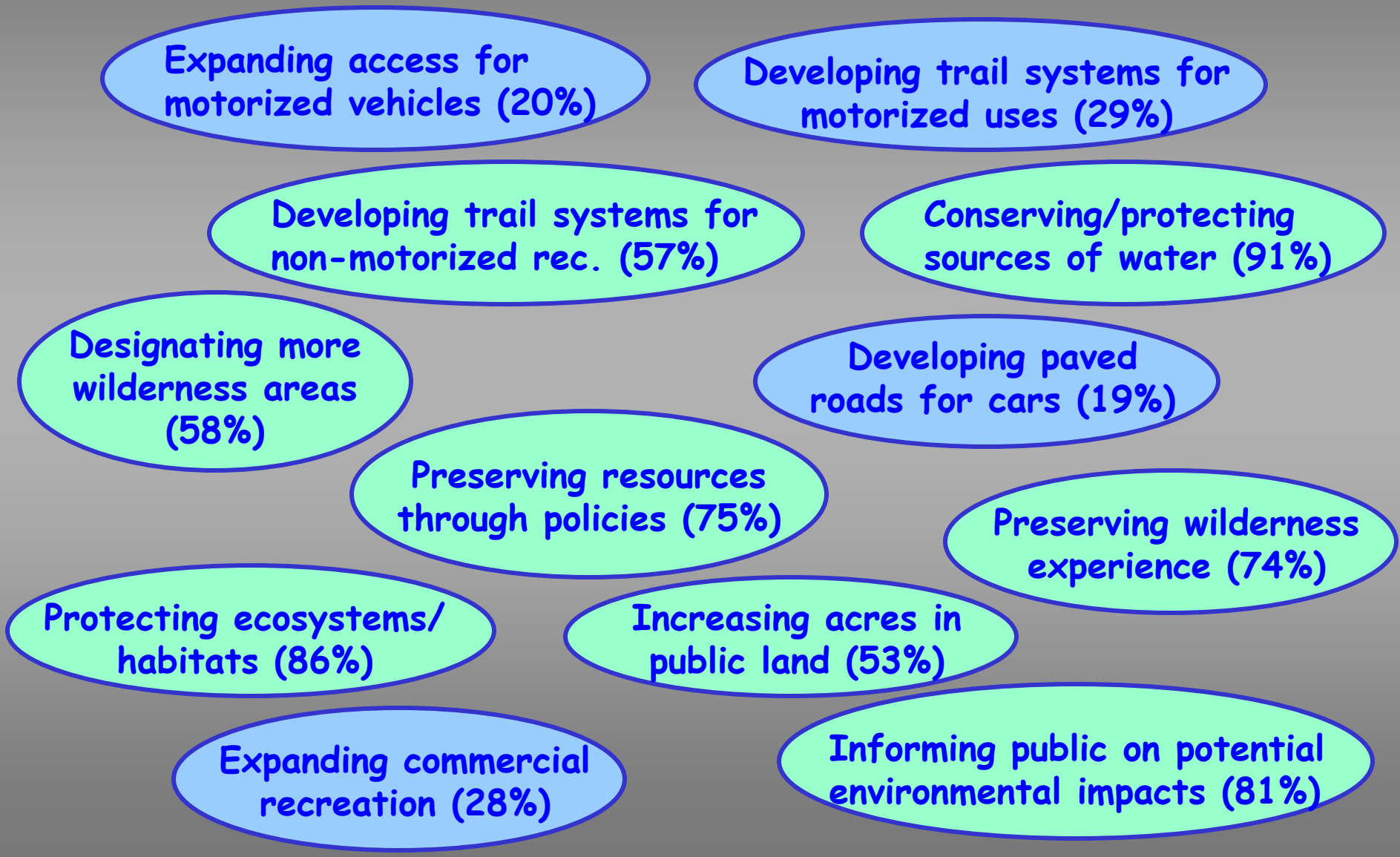
- Provide access, facilities and services for outdoor recreation
- Emphasize planting and management of trees for an abundant timber supply
- Provide access to raw materials and products for local industries and communities
- Provide roads, accommodations and services to help local tourism businesses
- Provide permits to ranchers for grazing of livestock such as cattle and sheep

(Average Score = 38.1)

WHAT OBJECTIVES DOES THE PUBLIC WANT EMPHASIZED IN THE MANAGEMENT OF NATIONAL FORESTS?

Objectives for Managing National Forests

(Percent in Nation saying important or very important)



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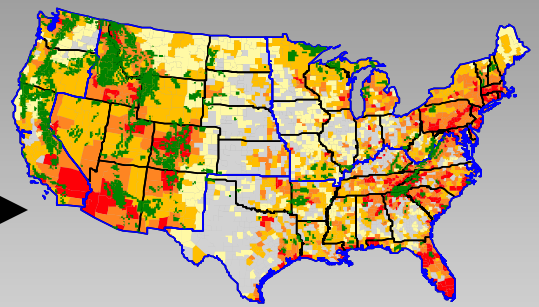
SUMMARY POINTS

- **Population is growing as birth rates override death rates, expected life spans lengthen, and immigration accelerates**
- **Population projected to more than double by 2100**
- **Growth in all regions, all states, almost all urban areas**
- **Urban growth is rapidly reaching into rural lands where our natural resources are located, including both public and private natural lands and water**
- **Usually amenity driven, rural land development and settlement makes neighbors of urban workers, national forests and other public lands---often close neighbors**
- **In response, outdoor recreation in the U.S. has been persistently growing over the last several decades**

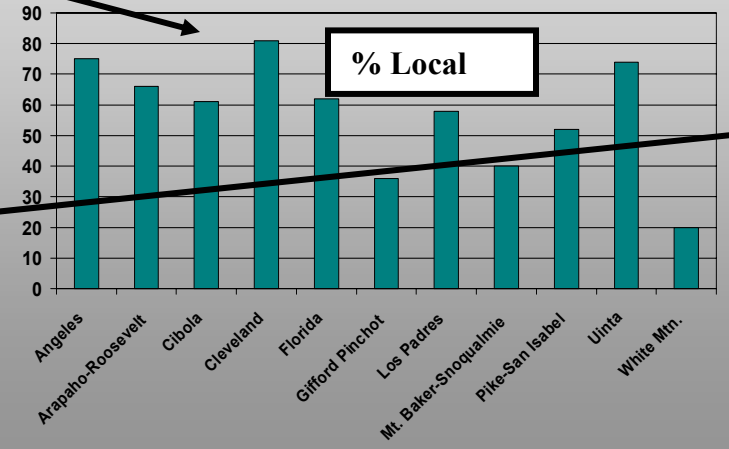
SUMMARY POINTS (Cont.)

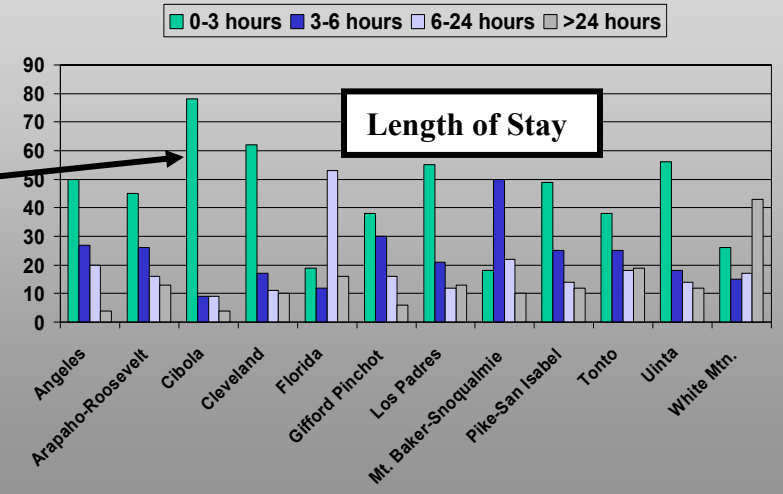
- Urban growth patterns are not likely to subside---remember our "footprints" work and predictions of hotspots???



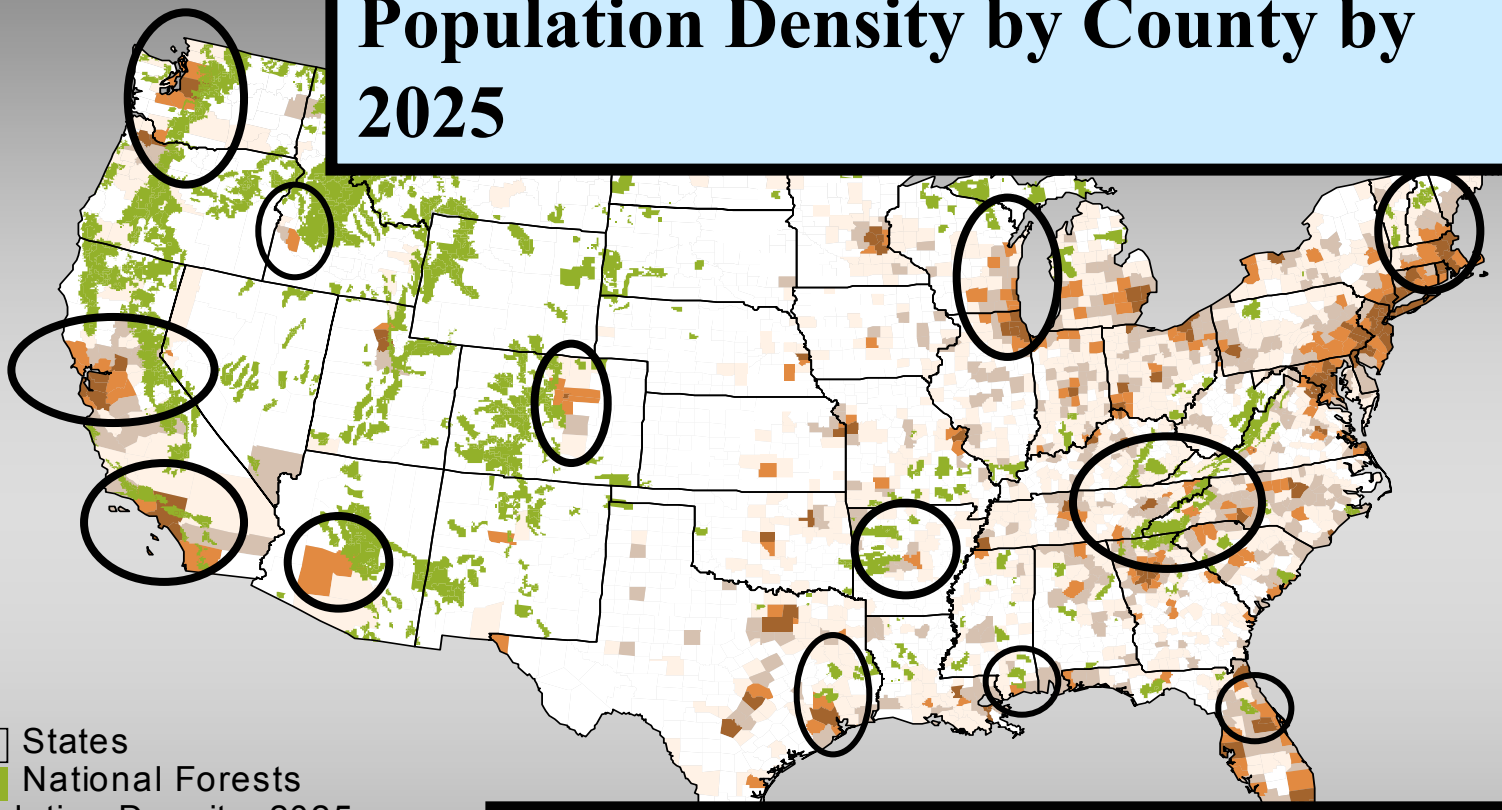
- Between 1982 and 1997, almost 27 million acres of rural land were converted to development, reducing the rural recreation resource, moving people closer to NFs, etc. Increasingly our visitors are ex-urban or non-traditional rural

- Stays are short





Population Density by County by 2025



Urban Population Growth Near NFs is Accelerating and Likely Will Continue

The Problem with Future Supply

- **Accommodating future growth in recreation demands will likely fall heavily on public properties and providers**
- **For federal properties, management of ecosystems and recreation are higher priorities, but funding is not coming with those priorities**
- **State lands, especially state parks, are reaching maturity, except for high-end development**
- **Private landowners are continuing to close more land**

Landowner Intentions

	National	South
open more	5%	4%
same	88%	91%
less	7%	5%

Conflicts Among Different Recreation Users Are Likely to Grow

- **Increasing demands for climbing, off-road vehicle use, hiking, horseback riding, motorized land use, wildlife viewing, tourism services, etc., etc., are likely to create more competition and conflicts for public properties, and for private owners.**
- **Broad spectrum of activities likely to be in conflict as demands grow for water access, trails, backcountry, developed sites, and roads.**
- **There is a tendency for one group (typically traditional and non-mechanized) to perceive much more conflict than others (non-traditional and mechanized).**

IDEAS????

Most of the more popular activities do not require a lot of investment nor intensive management. So???

Activities	Percent of Population 16+ Participating in 2000-01	Rank Order of Popularity 1994-95	Percent of Population in 1994-95
Walking for pleasure	83.1	1	66.7
Family gatherings	73.6	3	61.8
Visiting a beach	60.7	2	62.1
Visiting nature centers	57.4	8	46.5
Picnicking	54.7	5	49.1
Sightseeing	52.1	4	56.6
Attending outdoor sports events	49.9	7	47.5
Visiting historic sites	46.3	9	44.1
Viewing wildlife	44.7	**	31.2
Swimming in lakes, streams, etc.	42.1	10	39.0

- From humble beginnings, the INTERNET has grown to one of THE primary communications tool

•December 1995	16 million
•November 1997	76 million
•August 1999	195 million
•August 2000	369 million
•August 2001	513 million
•September 2002	606 million

Most of the folks moving into rural areas are on the internet. Influence through info. and messaging (segmentation). Maybe????

Can we figure out how to better work with the CDC, states, local P&R departments, etc. to effectively help meet growing demands????

DECISION SYSTEM

One that accumulates the information

A STEP by STEP APPROACH TO MAKING SENSE OF DEMOGRAPHIC AND DEMAND DATA

THE STEPS

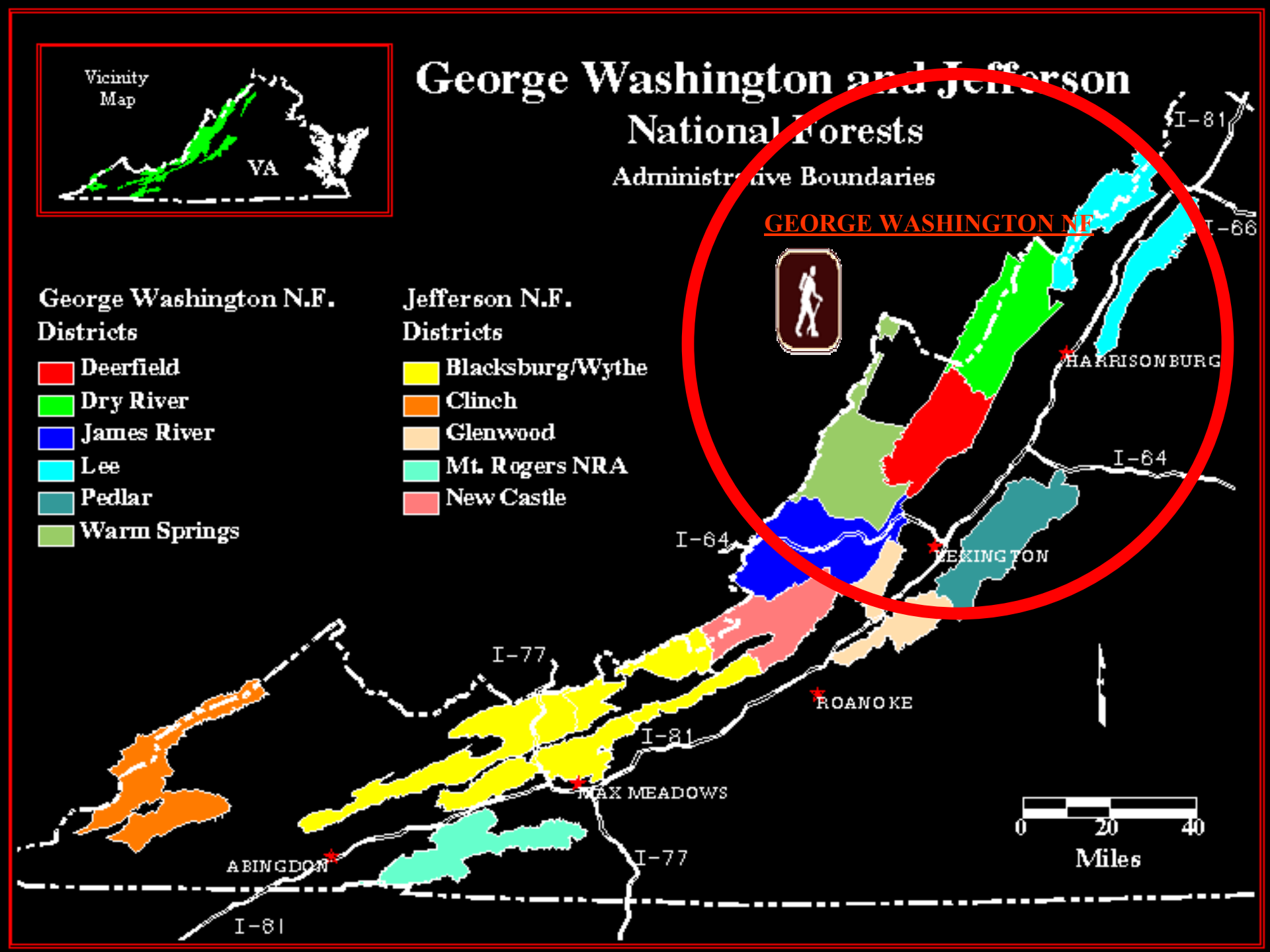
1. Examine population change in the region and in your market area (1 ½ to 2-hour drive)
2. Summarize overall outdoor recreation participation, i.e., the "big picture"
3. Examine of highest growth activities
4. See if participation differs by demographic group & identify expected demographic shifts
5. Identify activities likely to be most in demand on your forest or area, including current visitors
6. Sum up the direction given you by your population and demand data

THE 10 STEPS CONTINUED

7. Identify niche activities that surround special settings or resources (uniquely suited markets)
8. Identify who will and who will not be served by the results of your decisions (Title 6)
9. Overview other suppliers and what they offer in your market area
10. Study end results, review public values and identify concerns needing follow-up and more analysis

We have applied this procedure across all the NFs in the South. Provided a 165-Page Report with 115 pages of tables and charts to each forest. Included in National Tech Guide.

A Note: The analysis for individual NFs should also be performed at the regional level to identify Forests with the greatest demand pressures in the Region


Vicinity Map
VA
George Washington and Jefferson
National Forests
Administrative Boundaries
GEORGE WASHINGTON NF
George Washington N.F.
Districts
Deerfield
Dry River
James River
Lee
Pedlar
Warm Springs
Jefferson N.F.
Districts
Blacksburg/Wythe
Clinch
Glenwood
Mt. Rogers NRA
New Castle
I-81
I-66
HARRISONBURG
I-64
I-64
LEXINGTON
I-77
ROANOKE
I-81
MAX MEADOWS
I-77
ABINGDON
I-81
0
20
40
Miles

INFORMED DECISIONS USING CENSUS AND SURVEY DATA

- Population and Demographic Trends
- Urban Growth and Rural Transition
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- General Public Demand (NSRE) and Outdoor Recreation on Increasingly Urban NFs (NVUM)
- Considering What the Public Values and Discussion

www.srs.fs.fed.us/trends

National Visitor Use Monitoring Project (NVUM)

Objectives of the Project:

Estimate the total number of National Forest Visits nationally, regionally, and by forest.

The objective is +/- 15% error rate at the 80% confidence level at the Regional and National level

Key elements are consistency & statistical validity

Does not provide visitation estimates for a particular site or area on the forest

Need for Credible Use Numbers

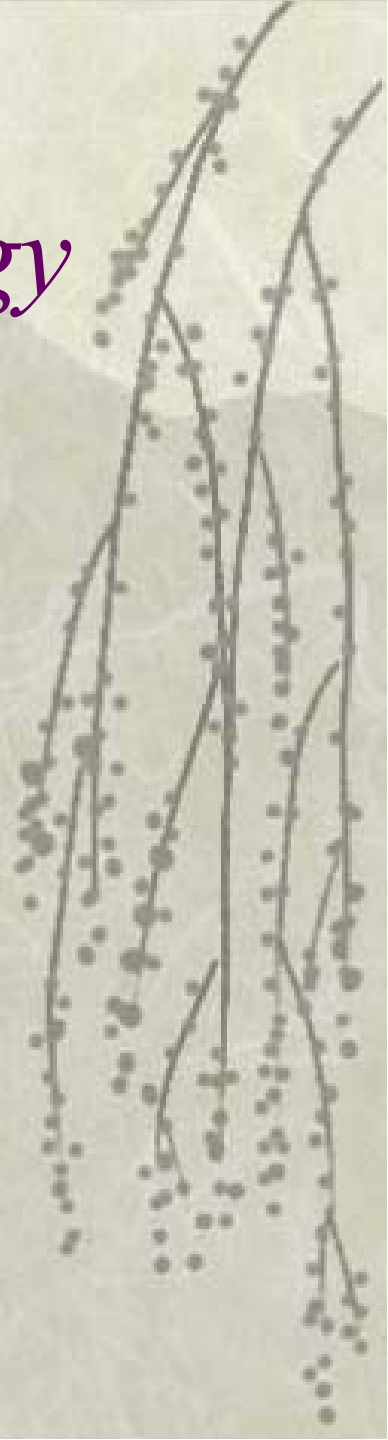
- Historically, recreation use was estimated by NF site and aggregated upwards- unknown statistical validity.
- Discrepancies with figures from other internal & external sources were difficult to defend.
- Lack of defensible estimates reduced FS credibility with partners.
- In 1997 the NFS recreation use number was questioned often. FS needed to improve its credibility. The pilot study was approved and implemented.

Partners in this effort

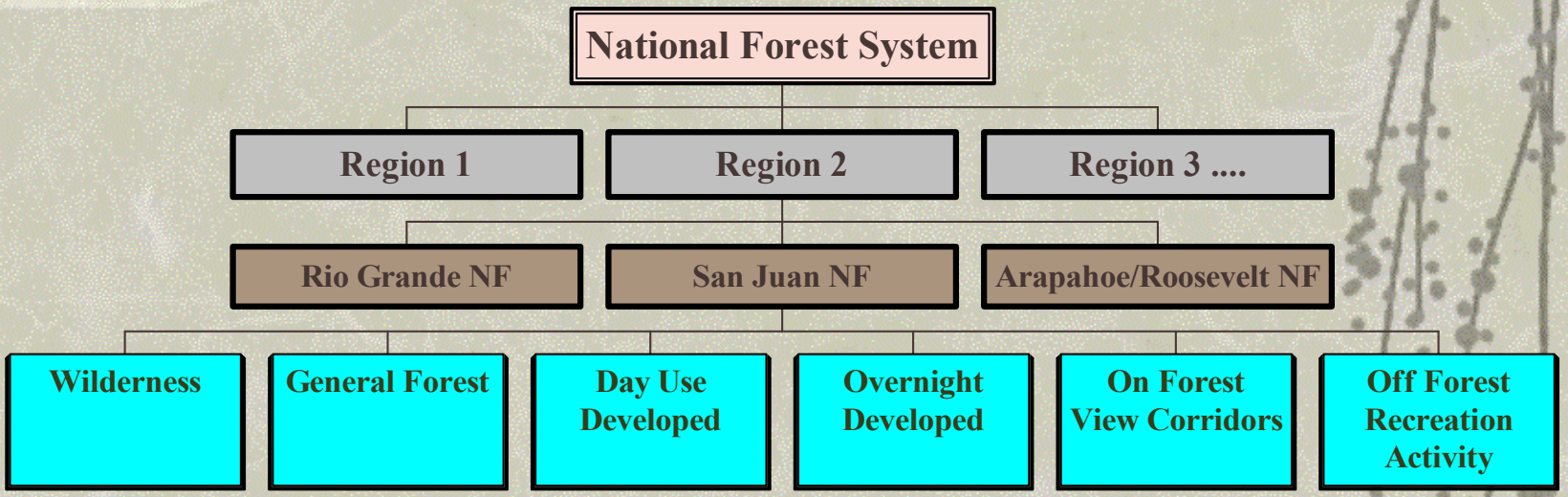
- NFS - Recreation
- NFS- Ecosystem Management
- NFS- Wilderness
- Southern Research Station
- Missoula Technology & Development
- SPRA- Strategic Planning & Assessment

Basic Sample Methodology

- Random site selection for sampling
- 24 hour traffic count or proxy count
- Minimum of 6 hours on-site interviewing
- If proxy available gathered for ALL sites on forest that have proxy, not just sampled site



Site stratification

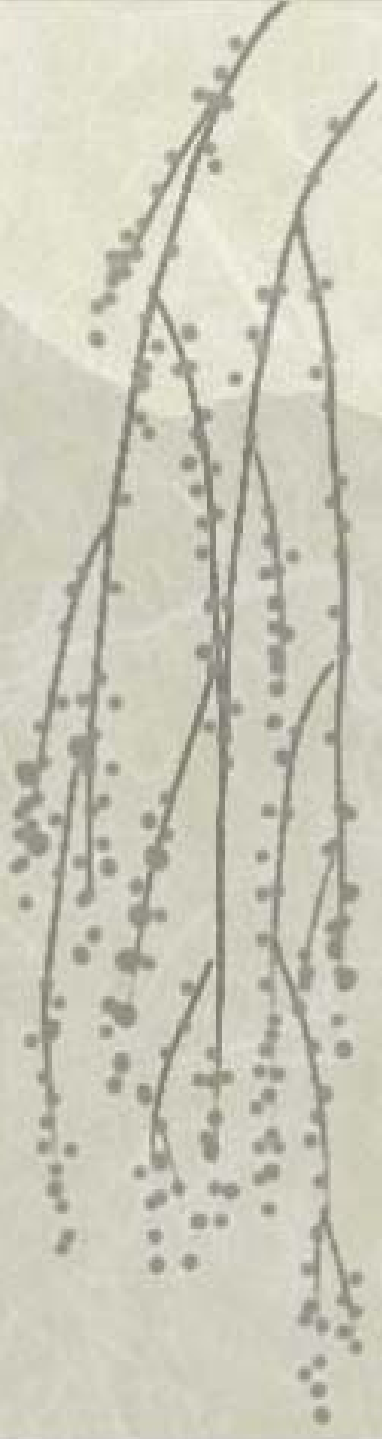


Information Collected

- # of people on a Forest that visit Wilderness
- Average length of stay at site/area
- Average length of stay on Forest
- Economic expenditure during trip
- Satisfaction with site/area
- # times in last year used this NF

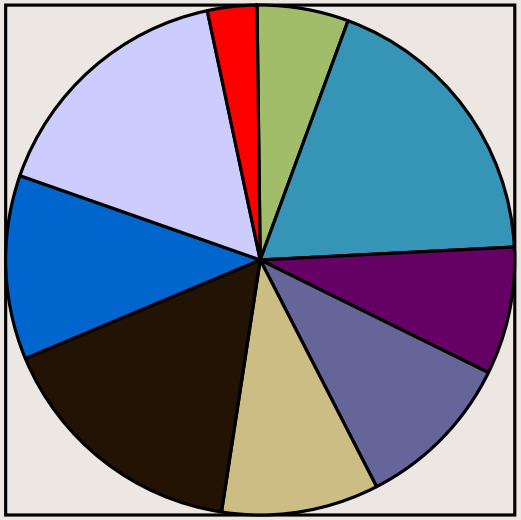
Information Collected

- Average people per car/group
- % using Wilderness guided/ unguided
- Activities participated in/ major activity



NF Visits by Region

R1:	12.4
R2:	38.5
R3:	17.3
R4:	20.5
R5:	20.2
R6:	34
R8:	24.9
R9:	34.2
R10:	7



Activity Participation

Activity	Caribbean	GW Jeff	Florida	Ouachita
View wildlife	91	35	21	63
View scenery	95	58	57	86
General relax	39	47	54	39
Hike/walk	56	39	23	73
OHV use	1	1	12	7
Drive pleasure	39	28	25	68
bicycle	0	8	4	3
picnic	14	16	28	14

Activity Participation

Activity	Caribbean	GW Jeff	Florida	Ouachita
fish	25	19	35	12
Prim. camp	0	6	8	14
Gather products	3	6	10	8
horseback	25	1	2	2
Sports & game	2	3	17	22
hunt	0	14	23	35
Nature centers	63	11	18	9
Dev. camp	1	14	15	6