



# ***Estimates of Future Participation in Outdoor Recreation in Washington State***

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State of Washington*

*The Board supports salmon recovery by funding habitat protection and restoration projects, and related programs and activities that produce sustainable and measurable benefits for fish and their habitat.*

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## Summary

Projections of future participation in outdoor recreation are useful for planning, including future expenditures, for sites and facilities.

This report by the Interagency Committee for Outdoor Recreation (IAC) provides estimates of future participation in 13 of 14 major categories over periods of 10 and 20 years. The estimates are based on:

- National Survey on Recreation and the Environment (NSRE) projections for the Pacific Region, including Washington State;
- age group participation and age trends in Washington;
- estimates of resource and facility availability;
- user group organization and representation;
- land use and land designations;
- “other factors” including the economy and social pressures.

The resulting estimates, as a percent of change in the number of people participating in the future compared to current levels, are depicted in the following table.

| <b>Activity</b>                    | <b>Estimated 10 year change</b> | <b>Estimated 20 year change</b> |
|------------------------------------|---------------------------------|---------------------------------|
| Walking                            | +23%                            | +34%                            |
| Hiking                             | +10%                            | +20%                            |
| Outdoor team and individual sports | +6%                             | +12%                            |
| Nature activities                  | +23%                            | +37%                            |
| Sightseeing                        | +10%                            | +20%                            |
| Bicycle riding                     | +19%                            | +29%                            |
| Picnicking                         | +20%                            | +31%                            |
| Motor boating                      | +10%                            | No estimate                     |
| Non-pool swimming                  | +19%                            | +29%                            |
| Visiting a beach                   | +21%                            | +33%                            |
| Canoeing/kayaking                  | +21%                            | +30%                            |
| Downhill skiing                    | +21%                            | No estimate                     |
| Cross-country skiing               | +23%                            | No estimate                     |
| Snowmobile riding                  | +42%                            | No estimate                     |
| Fishing                            | -5%                             | -10%                            |
| Camping – primitive dispersed      | +5%                             | No estimate                     |
| Camping – backpacking              | +5%                             | +8%                             |
| Camping – developed (RV style)     | +10%                            | +20%                            |
| Off-road vehicle riding            | +10%                            | +20%                            |
| Hunting-shooting                   | -15%                            | -21%                            |
| Equestrian                         | +5%                             | +8%                             |
| Air activities                     | No estimate                     | No estimate                     |

## *Introduction*

The Interagency Committee for Outdoor Recreation (IAC) is charged under state law with the compilation of a forecast of recreation resource demand.<sup>1</sup>

Projecting recreation participation into the future is at best a problematic exercise. Participation in various outdoor activities will be affected by changes in population, available sites and infrastructure, lifestyles, economics, technology, and the politics of land use.

Trends may be best detected in hindsight. Past trends, in fact, may be instructional. IAC has compiled statewide participation data on a somewhat regular basis since the late 1960's. The general results of IAC surveys done at roughly 10-year intervals over the past three decades can be compared, albeit with caution.

Survey methodology for each of the three surveys is generally the same: telephone contact with mail follow-up. The exact use of both telephone and mail were different each time, however. For example, the 1989 survey was a combination of recall and diary, while the 1999 survey relied on a statewide panel of people recruited by telephone to keep activity diaries for a calendar year. Results from 1989 were reported in household numbers, 1999 results in individual numbers.

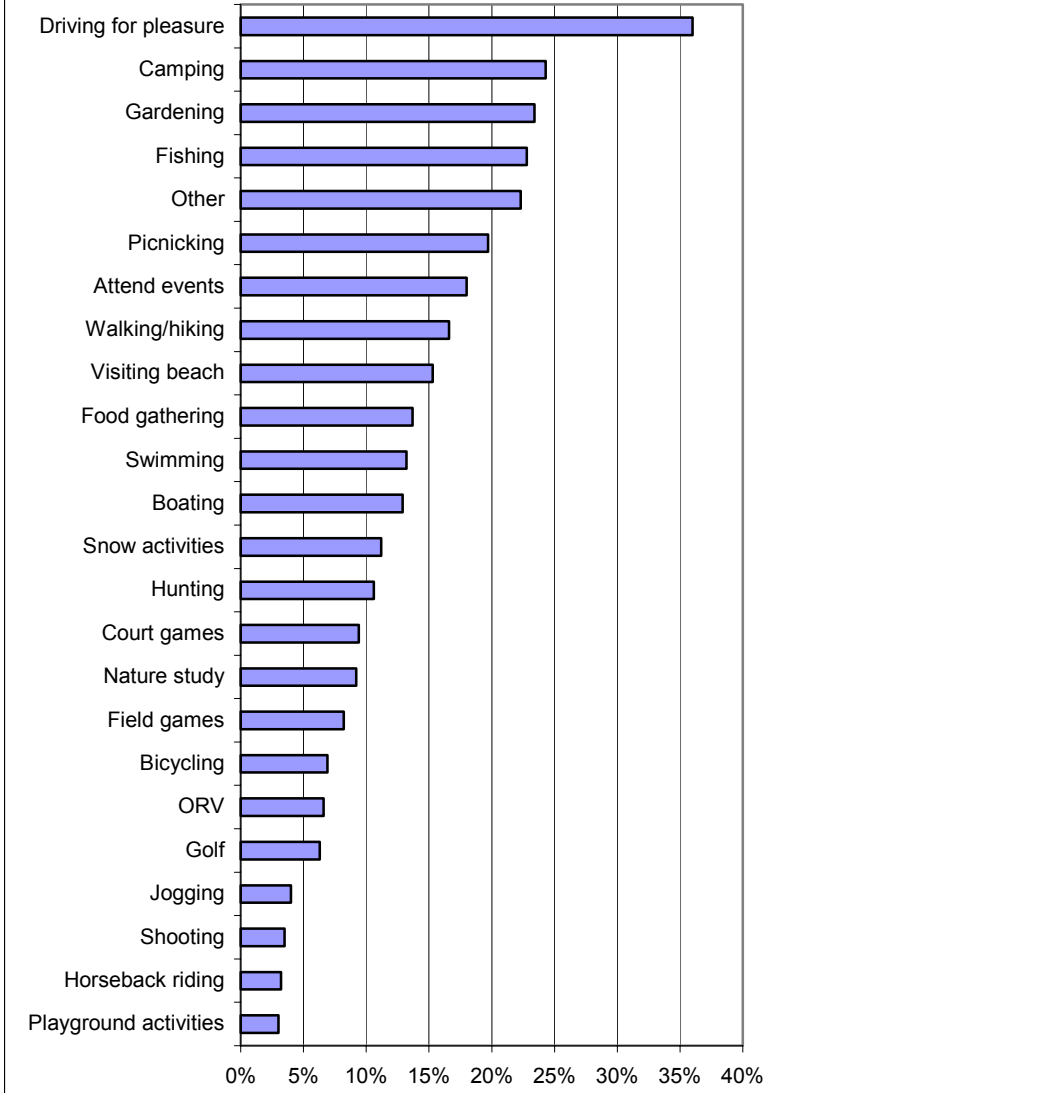
Also, results from each survey are reported in slightly different categories (combinations of related activities), making direct comparison difficult. For example, in surveys done in 1979 and 1999 bicycling was considered in a category by itself, but in 1989 it was combined with other recreation including equestrian use under a category called "nonmotorized riding."

Regardless, the data does suggest changes in participation over time, as depicted in the following charts.

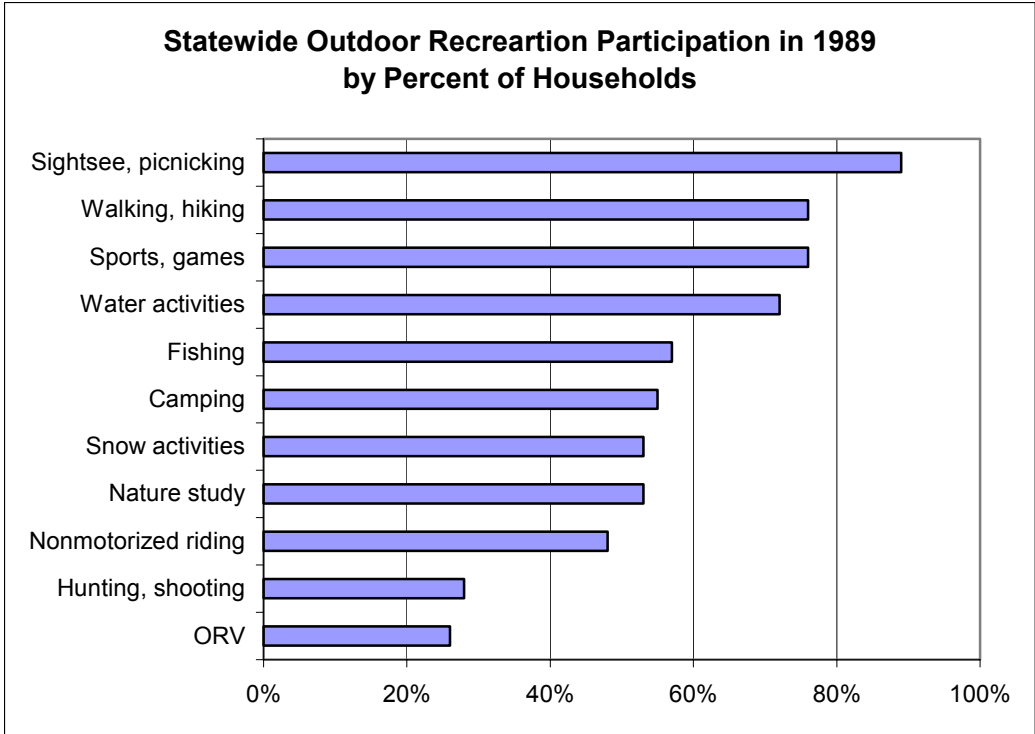
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<sup>1</sup> RCW 79A.25.020(3)(b)

### Statewide Outdoor Recreation Participation in 1979 by Percent of Population



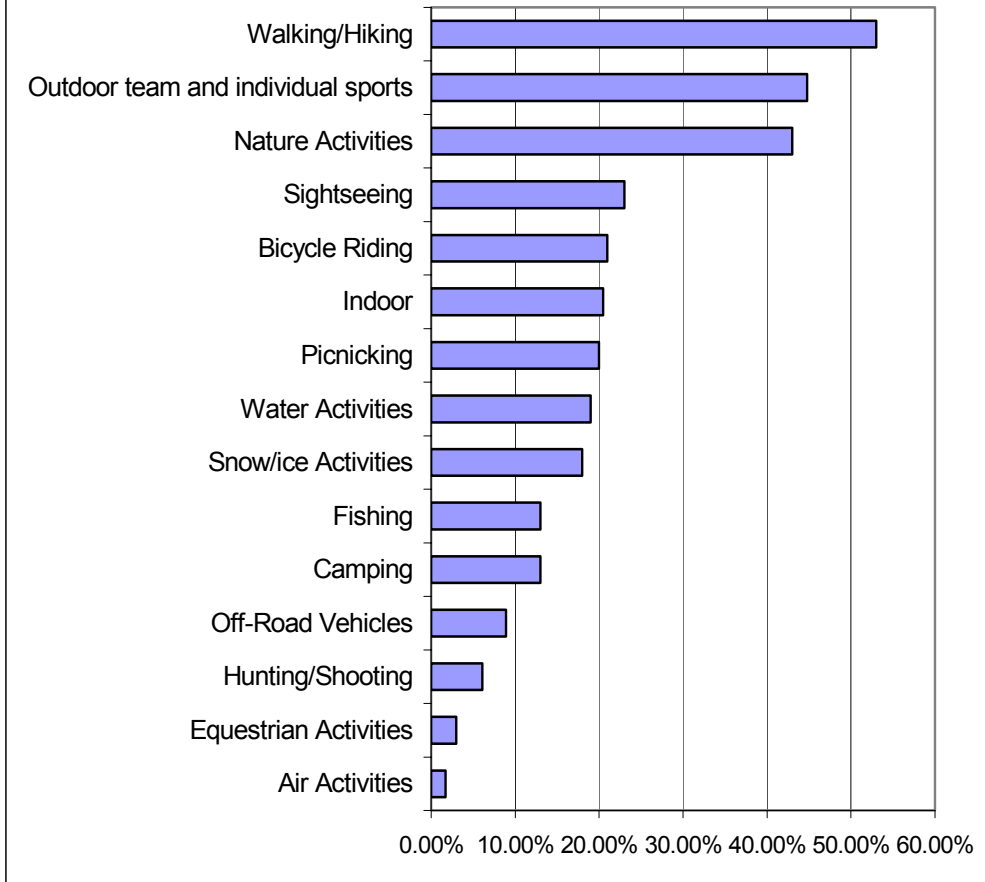
Data from *Washington Statewide Outdoor Recreation Plan 1979*, prepared by Interagency Committee for Outdoor Recreation. Total state population in 1979 was about 3.9 million (Office of Financial Management).



Data from *Washington Outdoors: Assessment and Policy Plan 1990-1995*, Interagency Committee for Outdoor Recreation, in cooperation with Pacific Northwest Regional Recreation Committee.

Total state population in 1989 was about 4.7 million, in an estimated 1.7 million households (Office of Financial Management).

### Statewide Outdoor Recreation Participation in 1999 by Percent of Population



Data from *An Assessment of Outdoor Recreation in Washington State 2002-2005*, Interagency Committee for Outdoor Recreation.

Total state population in 1999 was about 5.8 million (Office of Financial Management).



It is possible to make observations and draw general conclusions from the 3 data sets. For example, total numbers of people fishing and camping appear to be in decline (although sub-activities such as RV camping may be growing).<sup>2</sup> Walking and hiking combined appear to be growing.<sup>3</sup> Equestrian activities and ORV riding appear to be stable.

Overall, participation as a percent of total population may be in decline. Since the 1990 data was published, the state has seen an approximately 20% increase in population, an addition of just over one million people. The expanded population appears to explain reports of increased crowding at recreation sites,<sup>4</sup> yet at the same time has resulted in an apparently growing number of inactive people. The Washington State Department of Health has found that 50% of adults in Washington report some but insufficient physical activity to meet current recommendations for moderate physical activity during leisure time, and that an additional 18% report no activity at all during leisure time.<sup>5</sup>

Completely new activities are nearly impossible to predict: for example, the emergence of the personal watercraft and the mountain bike in the 1980s and 1990s were not accounted for under traditional projection methods, and indeed are difficult to detect in past data as reported above.

The future, in short, defies mathematics. Nevertheless, there is value in recognizing and attempting to anticipate changes in recreation participation. Recreation providers may use projections to make changes to address public demands or indeed to avoid inappropriate investments in short-lived or under-used sites and facilities.

### *The Implications of Trends*

Predicting changes in outdoor recreation suggests interesting policy decisions that may need to be addressed now or in the future. In the next few years, for example, State Parks may find itself under pressure to sacrifice undeveloped areas or open space to accommodate recreational vehicles of ever increasing size and capability. Should State Parks be expected to significantly alter sites for hook ups including cable television and the Internet, or should State Parks emphasize “nature” and encourage the private sector to address the more developed segment of the camping market?

This report may raise such policy questions, but it certainly does not presume to answer them.

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<sup>2</sup> The downward trend in fishing participation is confirmed by a decline in the number of fishing licenses sold by the Washington State Department of Fish and Wildlife (WDFW).

<sup>3</sup> In 1995, IAC reported that “The most popular and rapidly growing outdoor activities are those that take advantage of trails.” *Assessment and Policy Plan 1995-2001*, IAC.

<sup>4</sup> Comments received at focus group meetings, March 2001.

<sup>5</sup> *Physical Activity in Washington State*, Washington State Department of Health, November 2000. Physical activities measured included “chores” such as painting and carpentry.

## *The Basis for Making Projections*

This report provides an estimate of future use by outdoor recreation activity. Each estimate is based on several elements:

- National Survey for Recreation and the Environment (NSRE) projections for the Pacific Region, including Washington State;
- age group participation in Washington;
- estimates of resource and facility availability;
- user group organization and representation;
- land use and land designations;
- “other factors” including the economy and social pressures.

Each of these elements is defined below.

- *NSRE Estimates for the Pacific Region, Including Washington*

One of the leading efforts to measure and project demand is the work of the National Survey on Recreation and the Environment (NSRE)<sup>6</sup>. The NSRE represents the continuation of the National Recreation Survey (NRS) series.

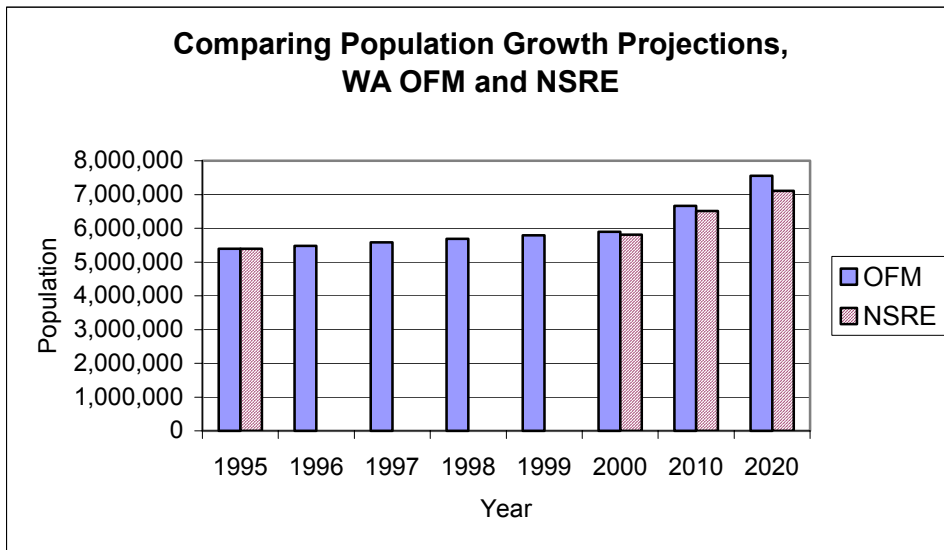
Begun in 1960 by the federal Outdoor Recreation Resources Review Commission (ORRRC), the first NSRE was a four-season, in-the-home survey of outdoor recreation participation in the United States. Since that time, additional surveys have been conducted in 1965, 1970, 1972, 1977, 1982-83, and in 1994-95. The most recent NSRE is summarized in the publication *Outdoor Recreation in American Life: A National Assessment of Demand and Supply Trends* (Cordell et al, 1999).

NSRE has earned a solid reputation as a principal data resource for recreation planning. A key feature of the NSRE is its projections of future participation in outdoor recreation. Projections are made for nation-wide participation, as well as for regions. Washington State is in the Pacific region.

One indicator of the accuracy of the NSRE’s data and base assumptions is how well its general population growth projections match Washington State’s official population projections. The Washington State Office of Financial Management (OFM) is responsible for official population data work in Washington, including estimates of population growth. Comparing NSRE’s population projections for Washington State to OFM population projections reveals estimates that are so close as to be virtually identical from a statistical perspective as shown on the chart below:

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<sup>6</sup> The Interagency National Survey Consortium, Coordinated by the USDA Forest Service, Recreation, Wilderness, and Demographics Trends Research Group, Athens, GA and the Human Dimensions Research Laboratory, University of Tennessee, Knoxville, TN.



Data from Washington State OFM and National Survey on Recreation and the Environment.

If it is assumed that an error margin of plus or minus 5 percent is acceptable, the two data sets are statistically identical. This favorable comparison makes it appear reasonable to use NSRE as a baseline for comparison. Returning to the idea that population growth is only one of a number of elements to be considered, however, it is necessary to understand the assumptions made by NSRE in its projection calculations.

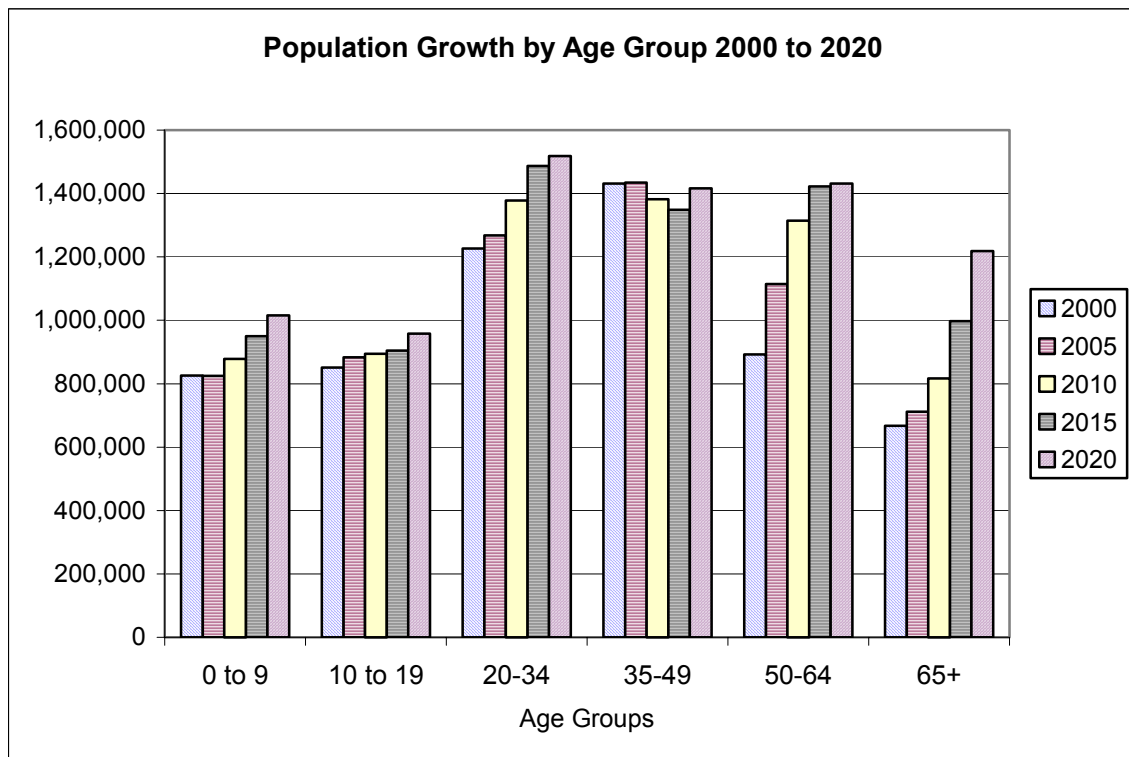
NSRE uses a set of resource recreation variables that tends to emphasize available acres of land, such as federal land acres and state park acres. In contrast, a key IAC finding in Washington State is that a significant share of outdoor recreation in Washington State relies on the local transportation system (sidewalks, streets, and roads),<sup>7</sup> facilities that are not considered in the NSRE projection model. Therefore, IAC finds that state- and activity-specific adjustments of NSRE projections are necessary and reasonable.

<sup>7</sup> An Assessment of Outdoor Recreation in Washington State, IAC, 2002

- *Participation by Age Group in Washington*

A key consideration in estimating future participation is distribution of activity by age group. Varying physical demands of different activities will encourage or discourage continued participation as people age. Vigorous field sports such as soccer or rugby, for example, tend to be the domain of younger people; RV camping, on the other hand, seems to appeal to older adults who seek to enjoy outdoor recreation in relative comfort.

According to OFM, all age groups will experience considerable growth through 2020. The most growth, however, will be in the older age groups, 50 to 64 and 65 and older.



Age trends will be discussed under each recreation category.

- *Estimates of Facility and Resource Availability*

The relationship between recreation and “supply” is multifaceted. Some outdoor recreation pursuits depend more directly on available resources (such as fish to hook and game animals to shoot) than on facilities (e.g., boat ramps to launch fishing boats). Other pursuits depend directly on facilities (e.g., organized field sports such as soccer and softball). Many pursuits do not depend on recreation-specific facilities: walking and bicycling take place on transportation facilities including roads, streets, and sidewalks.

Under each activity category, known supply variables will be discussed.

- *User Group Organization and Representation*

Whether an activity thrives or withers sometimes depends on how well it presents itself to the public, the Legislature, or a managing agency.

Some activities (walking, picnicking) appear not to lend themselves to “user group” organization. Sidewalk users, perhaps those walking or walking with pets, have not formed known significant organizations apart from socially oriented *Volksmarching*<sup>8</sup> groups or perhaps neighborhood associations that deal with a variety of issues. Hikers, on the other hand, have a significant organizational presence, as do off-road vehicle users, equestrians, field sports enthusiasts, hunters, and fishers.

The end results of organization can be on-going financial support (a fuel tax set-aside for trail facilities), agency emphasis (such as responding to volunteer group efforts to keep camps, trails, and ball fields open), and sometimes outright political support.

Consideration of known organizations and their effectiveness can help understand the possibility for future growth of a particular activity.

- *Land Use and Land Designations*

Land use has a profound impact on recreation. Timber lands managed for sustained yield may be compatible with pleasure driving on forest roads, motorized trail use, hunting, and other activities, yet discourage hiking and backpacking because the altered landscape may be less attractive to those users. In an urban setting, the decision to transform a grassy lot into a formal ball diamond will change use from dog walking, picnicking, Frisbee® tossing, and other informal uses into the scene of scheduled, organized softball or baseball.

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<sup>8</sup> A term borrowed from German, literally meaning “people’s walk,” used to denote a social, non-competitive walk or hike organized along the lines of a “fun run.”

Recreational use of a given property or landscape often will be dictated by land use designation. One of the well-known designations is Congressionally-established Wilderness area on federal land. Wilderness lands are managed to emphasize the preservation of natural features and ecosystem functions, with compatible recreational use allowed under length-of-stay, party-size, or total- party-number limitations. Compatible recreational use is defined as non-mechanized: if a recreational use was not common in the 1800's it is probably not compatible with Wilderness.

At the state level, wildlife recreation lands are managed to emphasize the needs of animals, often with restrictions on the time, place, and mode of human entry.

Land use and designations will be considered for each activity category.

- *“Other” Factors*

Some recreation trends can be predicted by changes in the economy. Boat sales, for example, are known to follow the national economy.<sup>9</sup> Caution, as always, is in order. The Washington State economy of the 1990s, dynamic and profitable, theoretically should have resulted in a booming recreational boating fleet. The reality was that growth in boating, especially among smaller trailer-hauled boats, was relatively flat, with total fleet growth of just under 2% per year.<sup>10</sup>

Activities such as walking that do not require “big ticket” consumer items, on the other hand, may not respond to economic changes because the activity simply does not cost much money.

Social pressures can influence whether an activity can grow or simply survive. The use of personal watercraft is a case in point. San Juan County passed ordinances restricting use of personal watercraft because of resident complaints, ordinances that were appealed all the way to the State Supreme Court.

- *Discussion*

Each of the factors noted above will be discussed for major recreation categories. Weighing the evidence, a “best guess” estimate of future participation in each category will be provided.

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<sup>9</sup> Data from National Marine Manufacturers Association, reported in Statewide Recreational Boating Study, BST Associates, May 2001

<sup>10</sup> Statewide Recreational Boating Study, Final Report, BST Associates, 2001

## *Recreation Categories*

For the 1999-2000 Washington state recreation survey mentioned previously, IAC contracted for a statewide survey of outdoor recreation participation. A working group of recreation professionals was assembled to advise on the design and implementation of the survey. The final survey design identified 15 major activity categories.<sup>11</sup> The categories are:

1. Walking – hiking
2. Outdoor team and individual sports
3. Nature activities
4. Sightseeing
5. Bicycle riding
6. Indoor (as a comparison)
7. Picnicking
8. Water activities
9. Snow-ice activities
10. Fishing
11. Camping
12. Off-road vehicle riding
13. Hunting-shooting
14. Equestrian activities
15. Air activities

These categories are used in this report. Except for “indoor,” each will be defined and discussed, concluding with an estimate of future growth or decline in 10- and 20-year periods.

Note: All participation data cited for the activity categories is from the 1999-2000 survey, as published in *An Assessment of Outdoor Recreation in Washington State* (IAC, 2002). All population data cited is from the Washington State Office of Financial Management.

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<sup>11</sup> The overall results of the survey are depicted in the chart on page 4.

## Walking and Hiking

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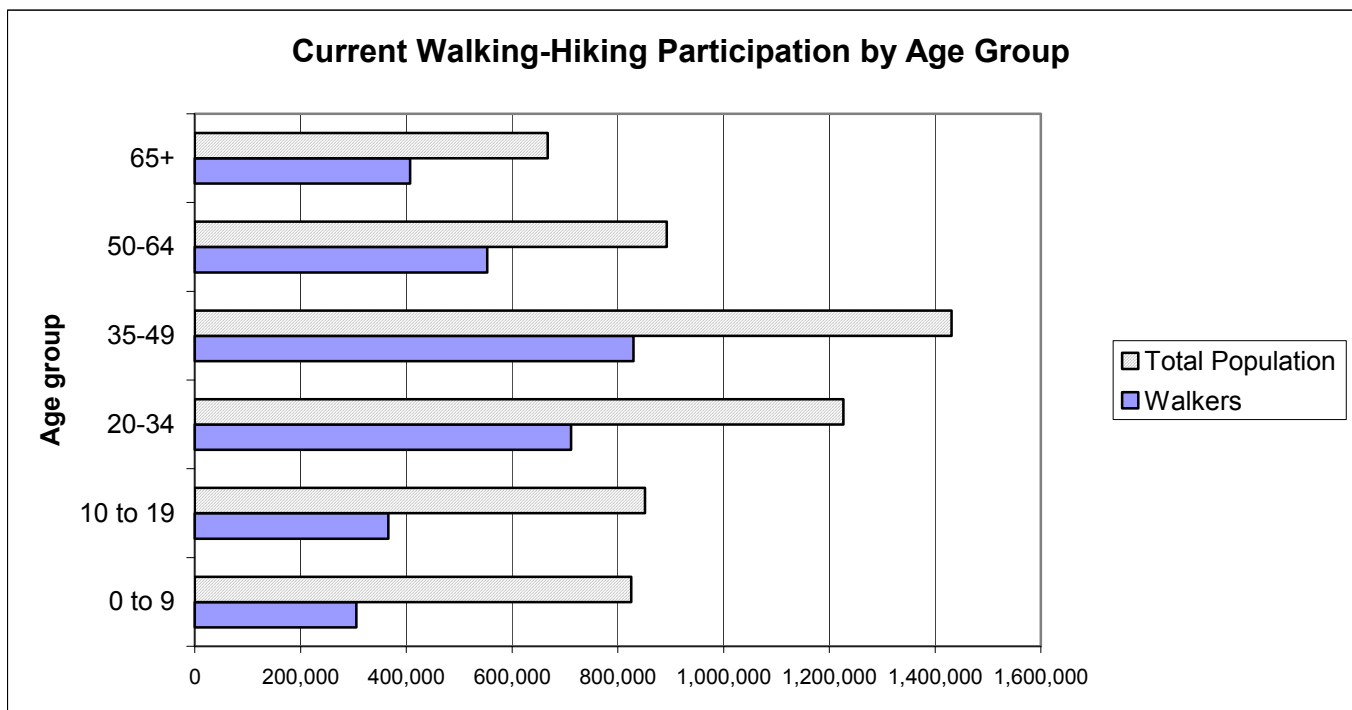
*Walking* is pedestrian activity for pleasure or exercise. A walk to the corner mini-mart may be fun or a chore, depending on the participant. A survey participant who reported walking at least once in the survey period is counted in this category. *Note: Hiking is discussed separately, immediately following.*

### *NSRE Estimates for the Pacific Region, Including Washington*

The NSRE estimates that walking will grow 23% in the next 10 years and 34% in the next 20 years.

### *Participation by Age Group in Washington State*

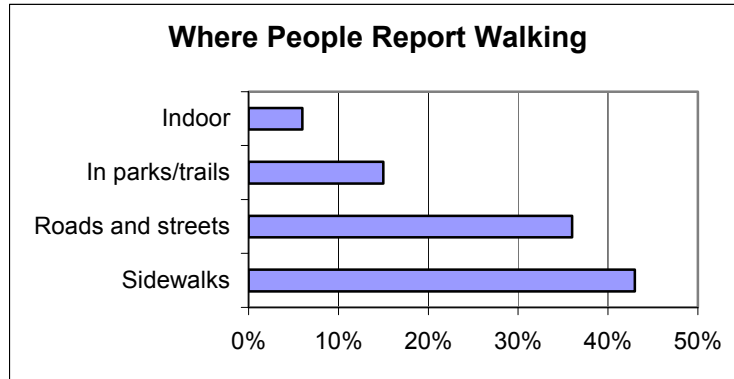
The most participation is among people aged 35-49. This age group is projected to decline in numbers over the next 15 years then expand for 5 years. Significant growth is expected in age groups 50 and above.





## *Estimates of Resource and Facility Availability for Walking*

Facilities used for walking include sidewalks, streets, roads, trails, school running tracks, and indoor areas such as mall corridors.



Considerable funding is available from transportation sources such as the Transportation Efficiency Act for the 21st Century (TEA 21) to help pay for transportation projects such as pedestrian connections that support recreational walking. What is not known is whether people *prefer* to use transportation facilities (sidewalks, roads, and streets) for recreation.

### *User Group Organization and Representation*

The walking “community” does not seem to be particularly well organized from a recreation user group perspective. Sidewalk, street, and road issues are usually seen as transportation or “livability” issues, important to neighborhoods and communities.

Trail-oriented organizations tend to focus on rural and backcountry trail opportunities for hiking and have less interest in walking in populated areas.

### *Land Use and Land Designations*

There is increasing dialogue among planners and others about whether development patterns emphasizing the use of the automobile can discourage people from walking. Community planners, encouraged by interest from the public health profession, are increasingly interested in providing pedestrian friendly environments.

### *Other Factors*

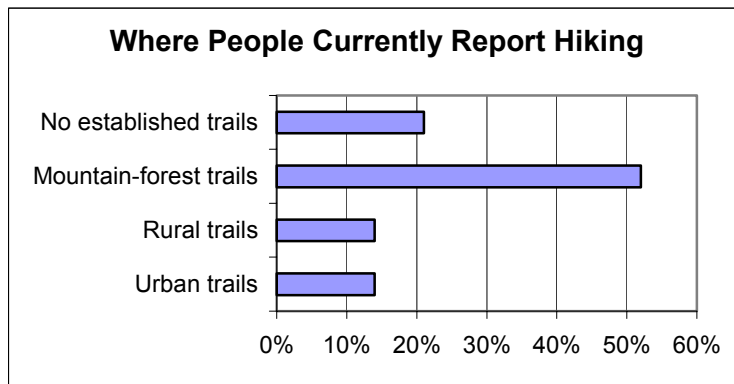
Walking is low cost, requires a minimal skill set, and can take place virtually anywhere.

## Discussion

IAC estimates that walking in Washington State can be expected to exhibit growth in the range predicted by NSRE.

## Hiking

Hiking is considered in this report as a sub-activity under “walking.” Hiking differs from walking by facility choice: hiking is perceived as a trail- and setting-dependent activity, usually associated with natural or natural-appearing settings. This assumption appears to be supported by participation data:

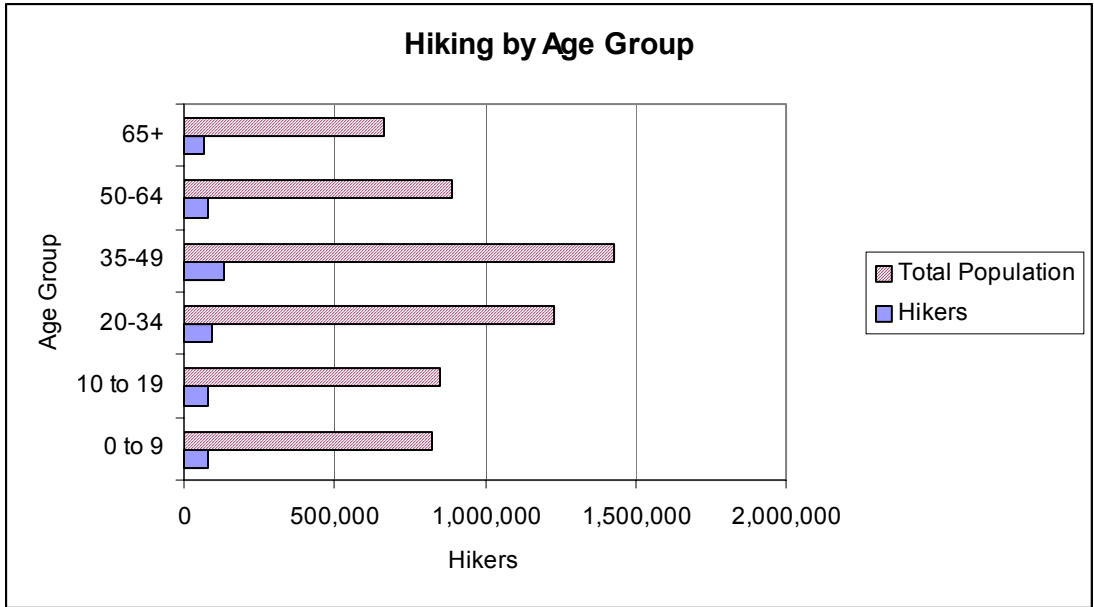


## NSRE Estimates for the Pacific Region, Including Washington

The NSRE estimates that hiking growth will be the same as walking: 23% over 10 years and 34% over 20 years.

## Participation by Age Group in Washington State

Hiking is dominated by age group 35 and older. Younger people presumably participate with parents or other older people. Participation can be expected to diminish with age, as physical abilities naturally diminish.



*Estimate Resource and Facility Availability*

The supply of trails on federal land appears to have reached its zenith in the 1950s and after a period of decline is relatively static.<sup>12</sup> IAC does not anticipate significant additions to the inventory of hiking trails on federal lands over the next 20 years. Additions to the state inventory have emphasized long distance routes such as the Cross-State and Columbia Plateau Trails. Significant trail inventory additions are more likely to be done at the city and county level, where walking is more common than hiking.

*User Group Organization and Representation*

Hiking is well represented by major clubs and associations including The Mountaineers, Washington Trails Association, Pacific Northwest Trail Association, the Sierra Club, and many others. The emphasis of these clubs and associations tends to be on federal lands and so-called “backcountry” trails. Stewardship and maintenance are key interests, with new trail development being promoted by smaller organizations.

*Land Use and Designations*

Although hiking can take place anywhere there is a trail system, there appears to be more interest in forest and mountain settings. Much of the mountainous terrain in Washington State is managed by federal agencies,

<sup>12</sup> Washington State Trails Plan, IAC, 1991

especially the National Park Service and the US Forest Service.<sup>13</sup> Federal designations such as Wilderness and National Monument encourage hiking.<sup>14</sup>

### *Other Factors*

Hikers appear to be sensitive to setting, weather, the absence or presence of other hikers (crowding), and the absence or presence of other types of recreation (e.g. hunting, motorized trail vehicles), and ease-of-access issues. The activity is relatively low cost, and generally socially acceptable.

Hiking is supported by dedicated funding sources from state (Nonhighway and Off-Road Vehicle Activity –NOVA – program) and federal sources (National Recreational Trails Program).

### *Discussion*

Considering the lack of growth in the hiking trail inventory, and the decline in participation with age, IAC suggests that NSRE projections are not applicable in Washington. IAC estimates future participation will grow more slowly than NSRE projections, perhaps in the range of 10% in the next 10 years.

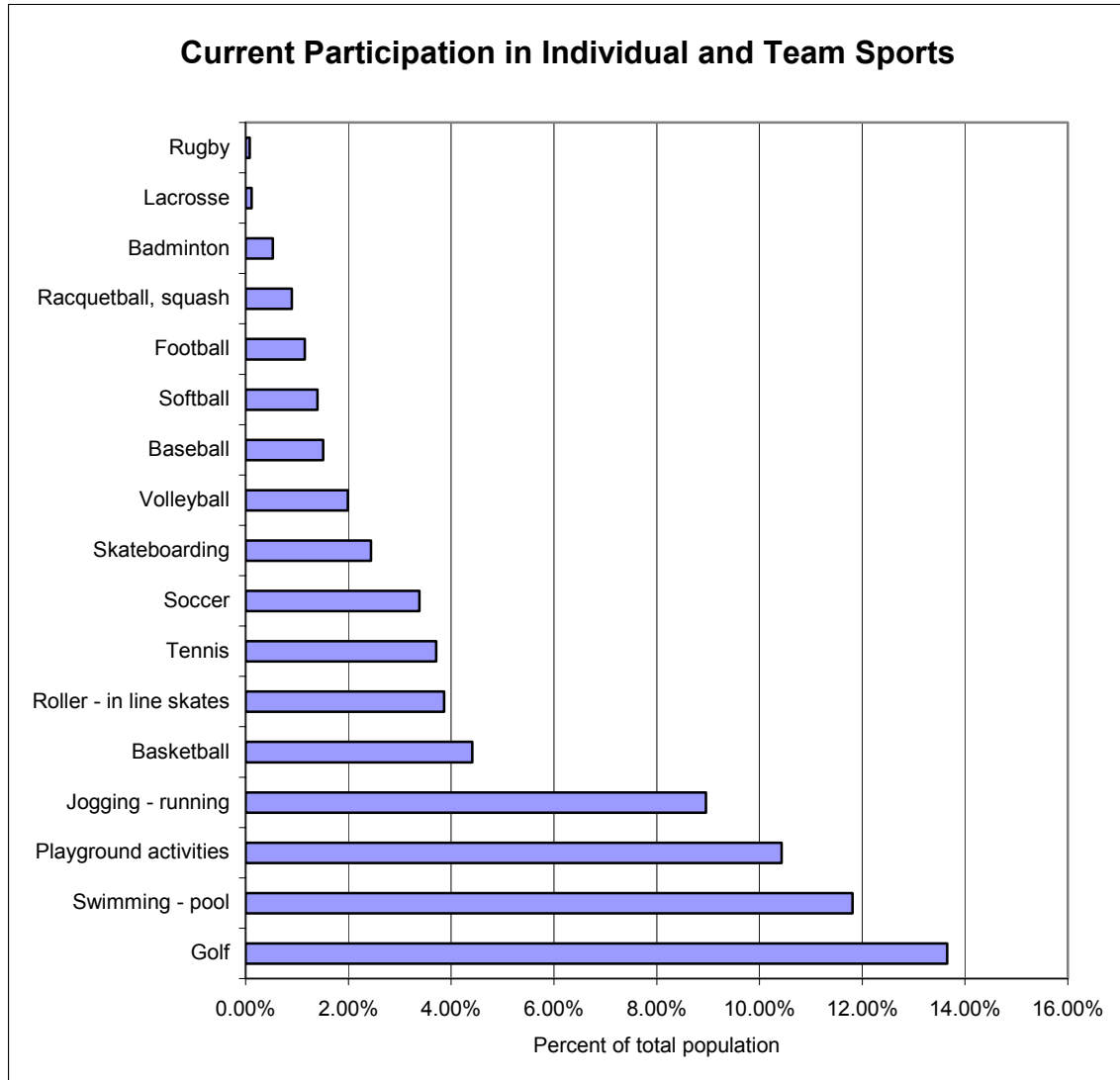
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<sup>13</sup> The 1999 Public and Tribal Lands Survey Final Report, IAC, 2001.

<sup>14</sup> The same cannot be said for backpacking, as will be discussed under “camping.”

## Outdoor Team and Individual Sports

A sport is defined here as an active pastime, sometimes competitive, involving physical exertion. The activities here are generally those requiring a swimming pool, course, court, or field. Current participation in Washington State is depicted in the following chart.

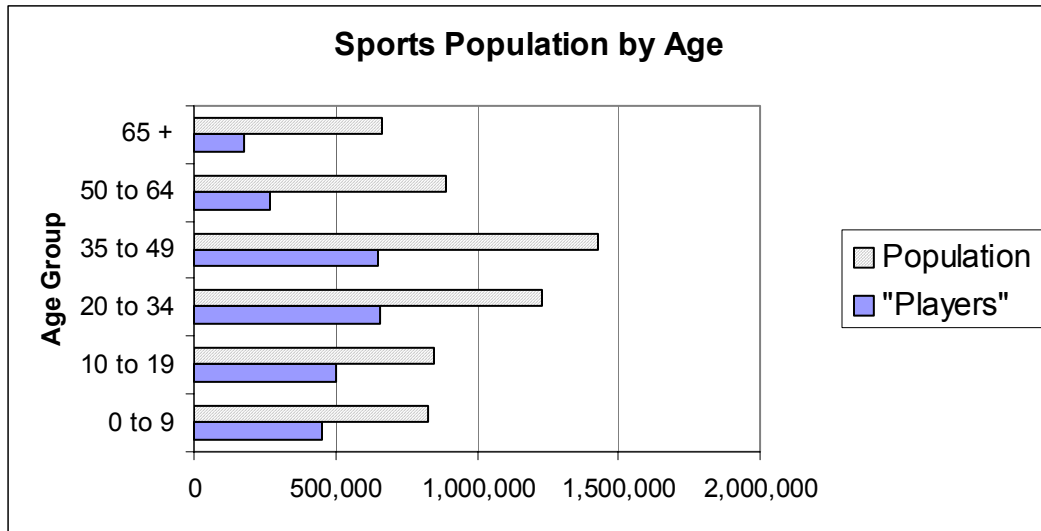


*NSRE Estimates for the Pacific Region, Including Washington*

None of the activities listed above are found in the most recent NSRE projections. IAC, therefore, will interpret the available data.

### Participation by Age Group in Washington State

Sport participation is relatively consistent among age groups. More young people (through age 19) participate in sports than in walking. Participation appears to decline with age, presumably as physical limitations increase.



### Estimates of Resources and Facility Availability

Sport facilities are in high demand, especially in urban areas. Additions to the inventory have focused on public ball fields and private golf courses.<sup>15</sup> New swimming pools are less common: the focus on swimming pools appears to be renovation of existing facilities.<sup>16</sup> Skate parks, though relatively few compared to ball fields, recently have been noted as high priority projects in many communities.<sup>17</sup>

In recent years, public agencies have experienced severe loss of revenue from a number of sources, with a result in a diminished capacity to provide public services. The result may well be a slow-down in the number of new facilities coming on line in the next several years.

<sup>15</sup> A \$10 million public investment through the Youth Athletic Facilities (YAF) grant program, a program established by a one-time gift from an affiliate of the Seattle Seahawks professional football team, resulted in the start of an estimated 15 new baseball diamonds, 20 new softball diamonds, 27 new soccer fields, 8 new volleyball courts, 6 new multipurpose fields, and 6 basketball courts in 1998-2000.

<sup>16</sup> Applications to Washington Wildlife and Recreation Program (WWRP) and Land and Water Conservation Fund (LWCF) in the late 1990s and early 2000s.

<sup>17</sup> Applications to Washington Wildlife and Recreation Program (WWRP) in the early 2000s.

### *User Group Organization and Representation*

Sports are well organized at the local level, often through leagues and capital facility campaigns. There is less organized presence politically on the state level, reflecting the local nature of supply-demand issues.

### *Land Use and Land Designations*

Most sports rely on activity-specific facilities usually provided on local public park lands. The days of pick-up games on empty lots or unused fields are fast disappearing.<sup>18</sup> Sports therefore will experience the same local competition for available land and resources as virtually any other pursuit.

### *Other Factors*

Public perception of sports appears to be greatly influenced by current events and personalities. For example, in public meetings held statewide in 1998 concerning the Youth Athletic Facility program, many suggested that the presence of the World Cup soccer event in the United States would signal a growth of interest and participation in the sport. The high profile of sports figures such as Tiger Woods in golf and Lance Armstrong in bicycling has resulted in similar comments with regard to their respective sports. The reality appears not to support these observations over a sustained period of time. Golf, for example, has seen a recent decline in demand statewide, resulting in an over-supply of golf courses.<sup>19</sup>

An emerging point of view also considers the impact of television, computer games, the Internet, shopping malls, and other indoor attractions.<sup>20</sup> Many adults believe that younger people in particular are not nearly as active as in previous generations because of these diversions.<sup>21</sup> Nevertheless, sports generally continue to enjoy widespread public support whether through first-hand participation or simply watching someone else play.

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<sup>18</sup> Comments heard at public meetings held by IAC for the YAF program in 1998 and for the development of the state comprehensive outdoor recreation plan (SCORP) in 2001.

<sup>19</sup> "Courses slump as 90's boom turns to bust," Seattle PI, July 8, 2002

<sup>20</sup> Kids and Media @ The New Millennium, Kaiser Family Foundation, 1999

<sup>21</sup> Comments heard at public meetings held by IAC for the YAF program in 1998 and for the development of the state comprehensive outdoor recreation plan (SCORP) in 2001.

## *Discussion*

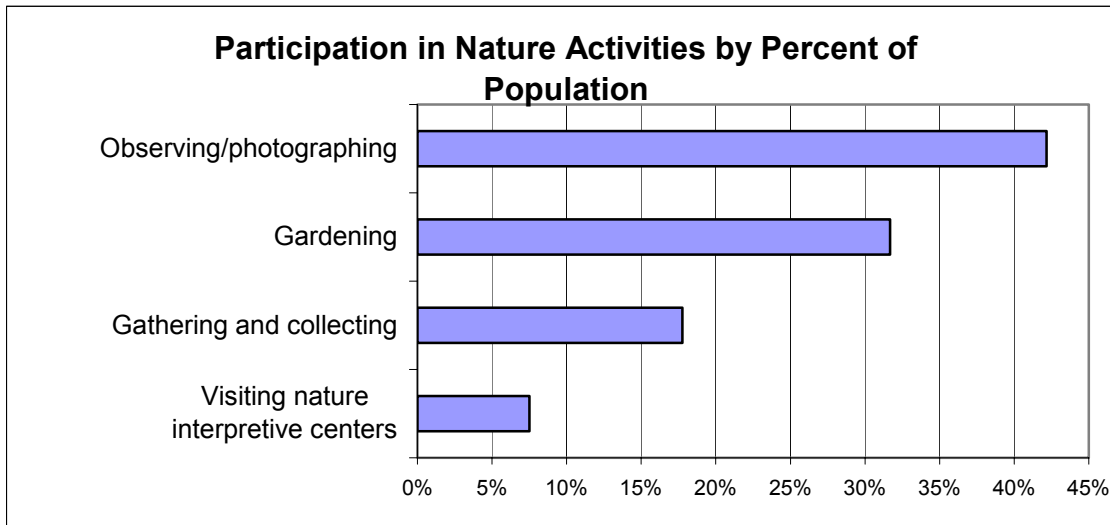
Sports participation generally should be expected to increase, perhaps to a greater degree among adults. IAC estimates that youth participation could grow at about half the rate of the youth population growth, or about 6% in 10 years. Adult participation may grow as much as 12% over the same period. Over 20 years, there should be an increase in youth participation due to a spike in the age group; IAC therefore estimates 20-year participation growth in the 12% range, with a similar growth in adult participation.



## Nature Activities

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Nature activities include outdoor photography, observing wildlife and fish (for example at fish ladders), whale watching, gathering plants or food (e.g., berries, mushrooms), collecting natural objects (e.g., rocks, driftwood), gardening, gathering firewood, and cutting holiday trees and boughs. The relative popularity of nature activity sub-categories is shown below.

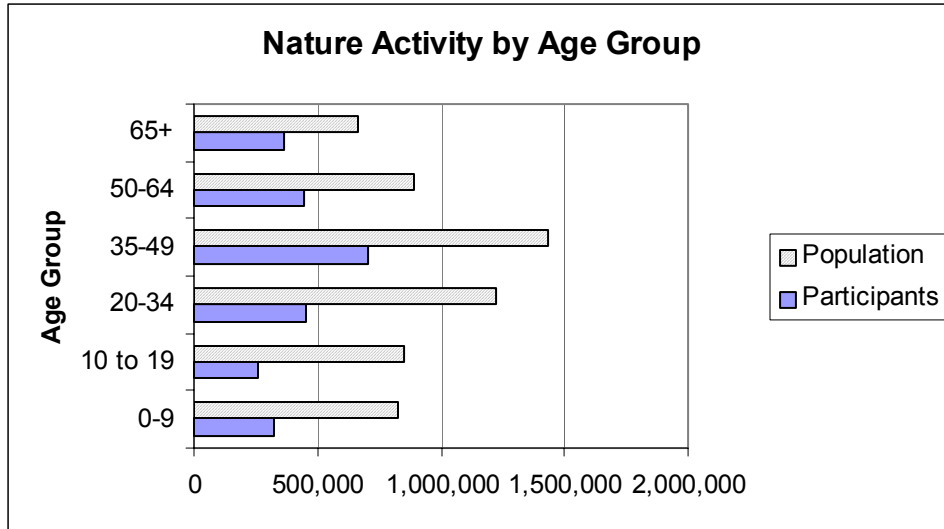


### *NSRE Estimates for the Pacific Region, Including Washington*

The NSRE uses the term "non-consumptive nature activities," and specifically cites wildlife viewing and photography. As a general category, nature activities are identified as a growing phenomenon, usually as a secondary activity associated with a primary trip such as camping. NSRE projects 10 year growth at 23% and 20-year growth at 37%.

### Participation by Age Group in Washington State

Perhaps not surprisingly, most nature activity takes place in the “middle” age category.



Low teen activity may not be surprising, considering the perceived unstimulating characteristics of the activity, the need for transportation to and from nature areas, and costs associated with observation equipment such as binoculars and cameras. Younger children (ages 0 through 9) simply may have fewer choices when it comes to participation with parents. Of note is the relatively large share of older age groups that participate. If this share holds as the age group grows, the 20-year growth of nature activities could be considerable.

### Estimate of Resources and Facility Availability

Photographing and observing wildlife and fish depend on natural settings including habitat for species of interest. The *1999 Public and Tribal Lands Inventory* reported that public land managers reported over 10 million acres with a principal use of “outdoor recreation, habitat, or environmental protection,” with over 9 million of these acres owned by the federal government, especially the USDA Forest Service; by comparison, the Washington Department of Fish and Wildlife (WDFW) reported 456,000 acres as wildlife recreation lands.<sup>22</sup>

WDFW and federal agencies such as the US Fish and Wildlife Service are increasing management emphasis on non-game species for the “watchable wildlife” enthusiast.

<sup>22</sup> IAC, 2001

Gardening reported here is “backyard” gardening on private lands, not pea-patch style gardening on public lots. Presumably, demand for private gardening space is associated with demand for certain types of housing.

### *User Group Organization and Representation*

Many environmental organizations are active in local and state efforts to preserve habitat and natural areas supporting fish and wildlife. Some issues relevant to nature activities become national in scope (e.g., preservation of roadless areas). The more well known groups include the Audubon Society, The Nature Conservancy, The Mountaineers, the Sierra Club, and the Washington Wildlife and Recreation Coalition. Garden clubs are fairly common, yet the high use of private property for gardening probably reduces the need for lobbying or advocacy at the state level. Neighborhood groups will lobby local government for public gardening plots (e.g., pea-patches).

### *Land Use and Land Designations*

Many types of land use short of urban development can be compatible with species of interest to nature study. Timber harvest and farming, for example, can be designed to benefit certain species. WDFW’s Upland Restoration program reports habitat-access agreements with over 1,200 private landowners covering more than 3 million acres.

Formal land designations such as Wilderness, wildlife recreation, natural area preserve, and natural resource conservation area are assumed to have an overall positive influence on the availability of habitat for species of interest.

### *Other Factors*

Laws protecting rare, threatened, and endangered species seem to continue to have the support of a majority nationwide. Most lands currently in public ownership will no doubt continue to be available for public access. Nature activities are relatively non-controversial, although wildlife managers may have concerns about the well-being of species that attract significant or inappropriate public attention.

### *Discussion*

NSRE projects 10 year growth at 23% and 20-year growth at 37%. IAC concurs and considers the NSRE projections to be applicable to Washington State.

## Sightseeing

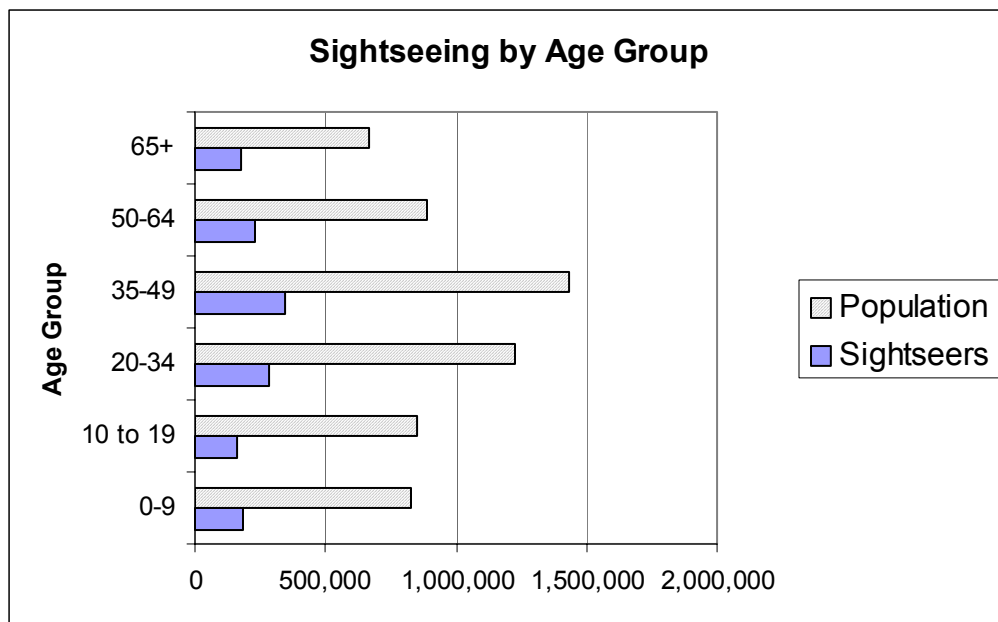
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Sightseeing includes driving for pleasure and bus touring.

### *NSRE Estimates for the Pacific Region, Including Washington*

NSRE estimates growth in this category at 26% over current levels in 10 years and 42% in 20 years.

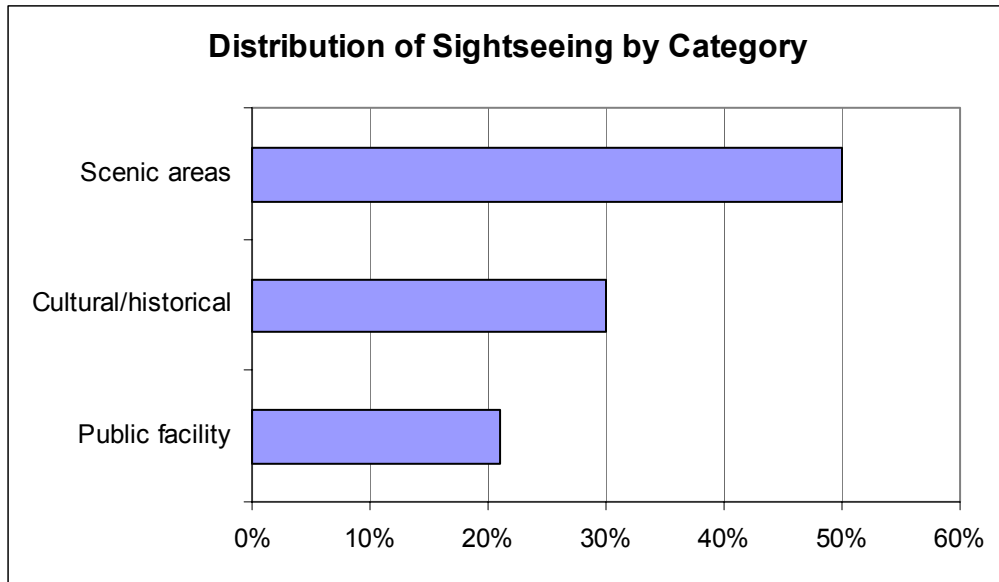
### *Participation by Age Group in Washington State*



Participation by age tends to follow the size of the age group. Older adults may participate less as the ability to drive motor vehicles declines, or switch from their own vehicles to for-hire conveyance. Younger children may exhibit slightly higher participation than teenagers; this may reflect the fact that younger children have fewer choices available to them.

### *Estimate of Resources and Facility Availability*

The Washington statewide survey measured sightseeing in 3 areas: scenic areas, cultural/historical sites, and public facilities (e.g., major dams). Scenic areas are the main attraction to the sightseer.



The inventory of scenic areas such as National Parks, National Scenic Areas, National Volcanic Monuments, National Forests, and state-managed ocean beaches cannot realistically be expected to change significantly in the next 20 years.

### *User Group Organization and Representation*

Federal funding for Scenic Byways has been available for some years and has helped to create increased public awareness of routes such as the Pacific Coast Scenic Byway.<sup>23</sup>

A few organized “byways” groups are active in Washington State, usually local organizations promoting their communities for tourist travel and sightseeing. Local government may promote road projects such as an extension of SR 504 across the Mt. Saint Helens National Volcanic Monument for economic development purposes. Groups such as AAA are well known and have influence concerning the designation of scenic routes. The “transportation lobby” is active, but may not be interested in the role of sightseeing where road development is not needed.

<sup>23</sup> The funding sources are the Intermodal Surface Transportation Efficiency Act (ISTEA) and the subsequent Transportation Equity Act for the 21<sup>st</sup> Century (TEA 21).

## *Land Use and Land Designations*

Land use designations including those listed above (National Parks, Forests, Monuments) have a direct influence on sightseeing. Simply applying a designation to an area of land can generate sightseeing interest. A “Hanford Reach National Monument” may well be the more attractive designation than “U.S. Department of Energy Hanford Site.” State Route 20 (the North Cascades Highway) can be expected to have significantly more sightseeing traffic than State Route 99 as the latter cuts its way through industrial areas in Tacoma and Seattle.

It is less clear what influence rural, agricultural-oriented land uses have on sightseeing. There are people who enjoy the sights of a working forest (including clear cuts and even-age plantations of seedlings), and others who enjoy naming crops in farmers’ fields.

Note that the designation of a state scenic and recreational highway does not mean that the sights along the route enjoy any particular status as a result. Some state scenic routes may soon become unworthy of the status as landscapes transform into housing and malls. State Route 542 between Bellingham and Deming is worth considering in this sense.

## *Other Factors*

In May 2001, the Texas Transportation Institute issued a report in which the greater Seattle area ranked second nationally in traffic congestion (travel-time index and annual congestion costs). It ranked third in another category, a travel-rate index, behind Los Angeles and San Francisco.<sup>24</sup> If faced with some of the nation’s worst traffic during the workweek, people in Washington’s most populated areas may become reluctant to drive on weekends. Conversely, it could be argued that people may seek escape from urban traffic and crowding by heading for rural back roads.

## *Discussion*

Washington residents, like most Americans, will no doubt continue the love affair with the motor vehicle. The trend in Washington resident participation in sightseeing over the past 20 years has been downward. In conclusion, IAC does not expect sightseeing to meet NSRE projections. We suggest that growth of about 1% a year is reasonable, with 10- and 20-year growth at about 10% and 20% respectively.

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<sup>24</sup> 2002 Urban Mobility Study, Texas Transportation Institute, Texas A&M University

## Bicycle Riding

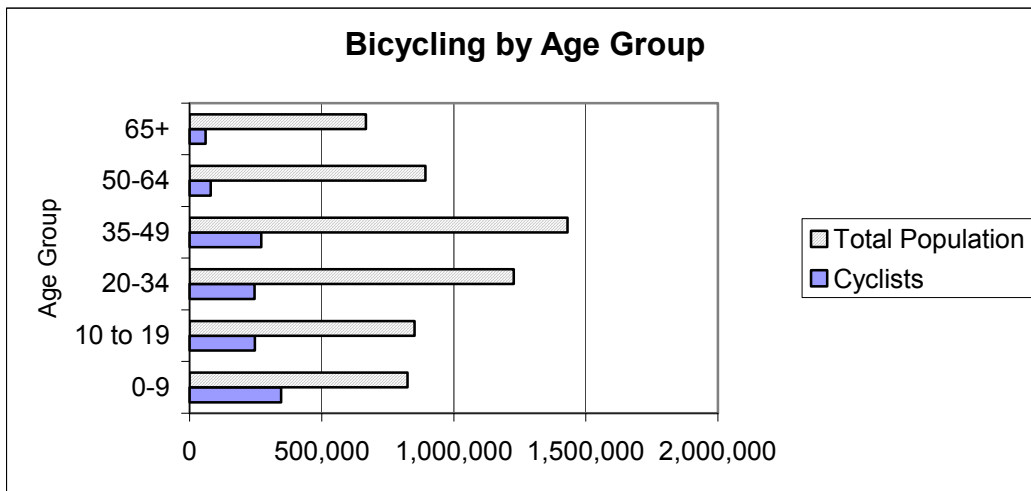
Bicycle riding includes the recreational use of any style non-motorized pedal-and-chain driven machine (tricycles, tandems, recumbents, mountain bikes, touring, racing, and track bicycles) ridden on trails, streets, and roads.<sup>25</sup> Some may regard utilitarian use of bicycles (e.g., a ride to the store) as recreation.

### *NSRE Estimates for the Pacific Region, Including Washington*

NSRE projects bicycle use generally to grow 19% in 10 years and 29% in 20 years. Growth in specific types of cycling is not projected.

### *Participation by Age Group in Washington State*

The most bicycling is reported among young children. Bicycle riding drops considerably when people reach teen years and continues to decline with age.

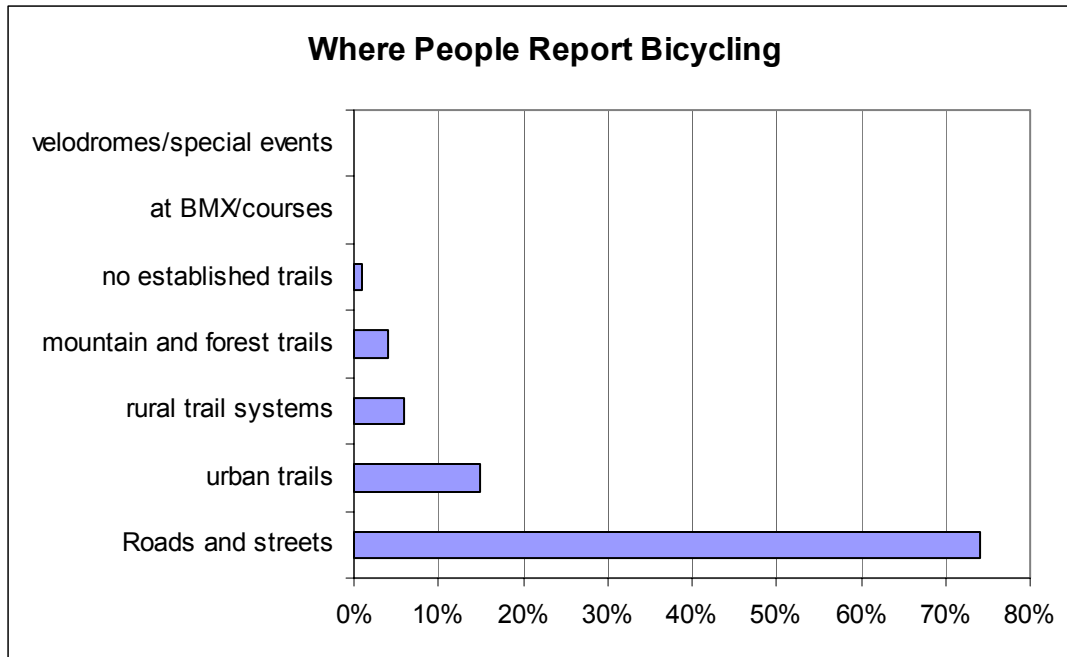


Even double-digit participation growth among older adults will not match the activity by children in the near future.

### *Estimate of Resources and Facility Availability*

It appears that bicycling generally does not depend on bicycle-specific facilities or settings. Of note is the extent to which bicycling takes place on transportation facilities including streets and roads.

<sup>25</sup> Recreational use does not include commuting or other utility uses of bicycles.



In short, it appears that a significant number of young children are riding bicycles on the street in front of their homes, probably on short trips of no more than a few hundred yards.

Statewide, there are about 38,000 miles of streets, roads, and highways open to bicycling.<sup>26</sup> It is likely that relatively few of these miles are of interest to cyclists, especially children. Although the miles of streets, roads, and highways will probably grow over the next 20 years, because road construction is traditionally focused on the motor vehicle, it is unlikely that the new miles will attract significant cycling unless cycling-specific amenities are included.

For the mountain bicycle rider seeking an off-road trail, there are about 2,900 miles of trail available statewide. Most of these trails are at higher elevations, inconvenient to populated areas. It is unlikely that the inventory of mountain-oriented trail will grow appreciably in the next 20 years.

<sup>26</sup> Washington State Department of Transportation estimate, published in Washington State Trails Plan, IAC, 1991



## *Land Use and Land Designations*

There appears to be a direct relationship between bicycle use and land use, regardless of setting.

Urban bicycling can be discouraged by heavy development that emphasizes motor vehicle use. Without provision of lanes, paths, routes, or separated facilities, cyclists unaccustomed to or not comfortable with motor vehicle traffic will either not ride or seek settings with fewer cars.<sup>27</sup> As the populated areas of Washington continue to be built up, cycling may be discouraged unless it is specifically considered in the design and construction of mobility projects.

Backcountry trail riding (usually requiring a mountain or ATB bicycle) is affected by land use designations such as Wilderness that exclude mechanized and motorized uses.

## *Other Factors*

Improvements in bicycle design and technology over the past 10 years have made cycling relatively more comfortable and simpler.<sup>28</sup> Increased media exposure of extreme BMX riding, downhill mountain bike racing, and major events such as the Tour de France (when an American wins) may have some impact on current cyclists who decide to shift emphasis from casual or fitness riding to competition.

## *Discussion*

As most cycling is done by young children, probably close to home, it is likely that growth in this age group will result in continued growth of cycling. The classic introduction to the activity through the “bicycle for Christmas” will no doubt continue for kids, but whether this will result in continued participation by teenagers and adults appears problematic. People seem to shift from bicycles to cars in the teen years and do not look back after that.

IAC suggests that the NSRE projections are accurate, but cautions that most growth in Washington will be among young children up to age 9.

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<sup>27</sup> Comment from focus group participants, IAC, March 2001

<sup>28</sup> Improvements include lighter frames and wheels, indexed shifting, suspension forks and seat posts, comfort saddles, and improved braking.

## Picnicking

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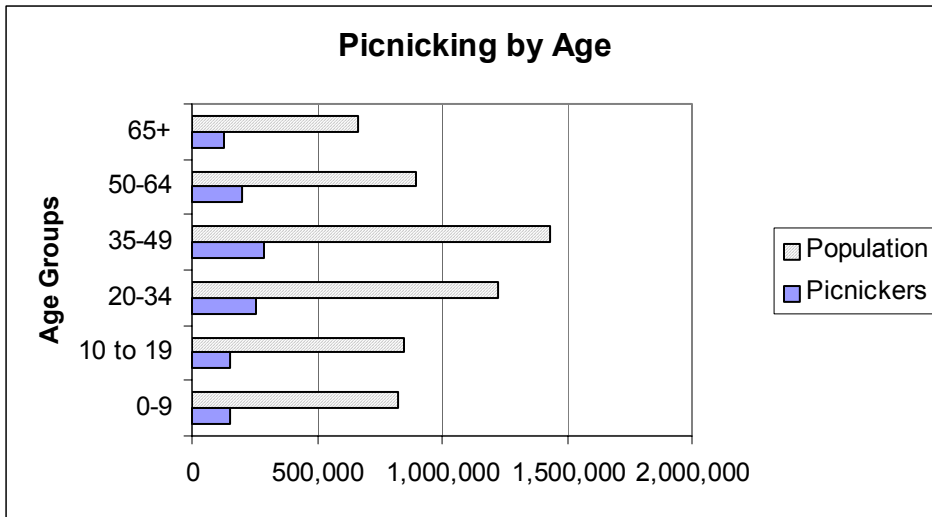
Picnicking is an outdoor meal or social gathering focused on the preparation and consumption of food. Picnicking can be an event in itself or a break in a different activity such as a sightseeing trip or bicycle tour.

### *NSRE Estimates for the Pacific Region, Including Washington*

NSRE projects growth in picnicking of 20% over the next 10 years and 31% over 20 years.

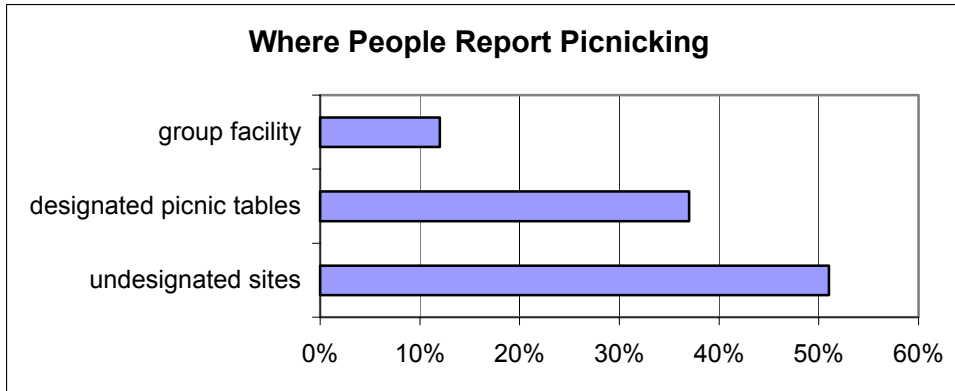
### *Participation by Age Group in Washington State*

Participation is well represented in all age categories in proportion to the size of each age category.



### *Estimates of Resource and Facility Availability*

Of interest is that well over half of the participation in picnicking does not appear to be facility dependent.



An undesignated site can be a campsite, a flat spot alongside a walking route, the bleachers at a ball game, a parking space at a park, or the backyard. It appears that the activity is potentially limited only by the perception of where a meal or social gathering can take place. Designated picnic tables (areas), therefore, may be somewhat irrelevant to the growth of the activity.<sup>29</sup>

### *User Group Organization and Representation*

There are no known organizations focusing on this activity.

### *Land Use and Land Designations*

It would appear that land use and land designations have little effect on the majority of this activity.

### *Other Factors*

People like to eat, especially with company. And probably always will.

### *Discussion and Conclusion*

NSRE projects growth in picnicking of 20% over the next 10 years and 31% over 20 years. IAC concurs with the NSRE projections.

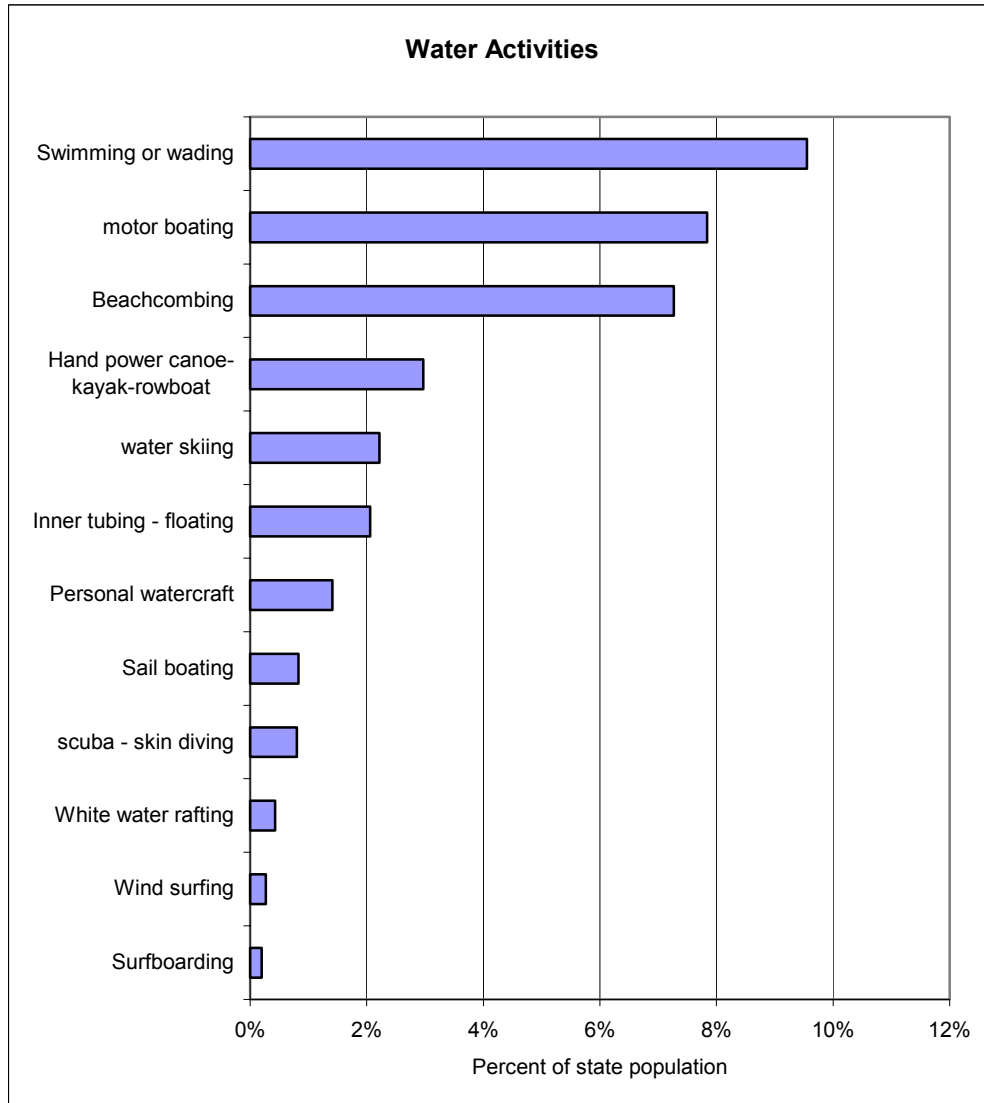
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<sup>29</sup> An urban park manager commented to us, "It amazes me the number of people that buy fast food for lunch, then drive to one of our parks to eat -- in their cars to listen to music, read a book, or enjoy the serenity of a park. All seasons of the year!" (December 2002)

## Water Activities

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Water activities cover a broad range of pursuits including all boating (motor, sail, and hand-powered), swimming, beachcombing, surfing, windsurfing, and diving.



*NSRE Estimates for the Pacific Region, Including Washington*

NSRE considers a number of activities in this category.

Motor boating projected to grow 22% in 10 years and 32% in 20 years.

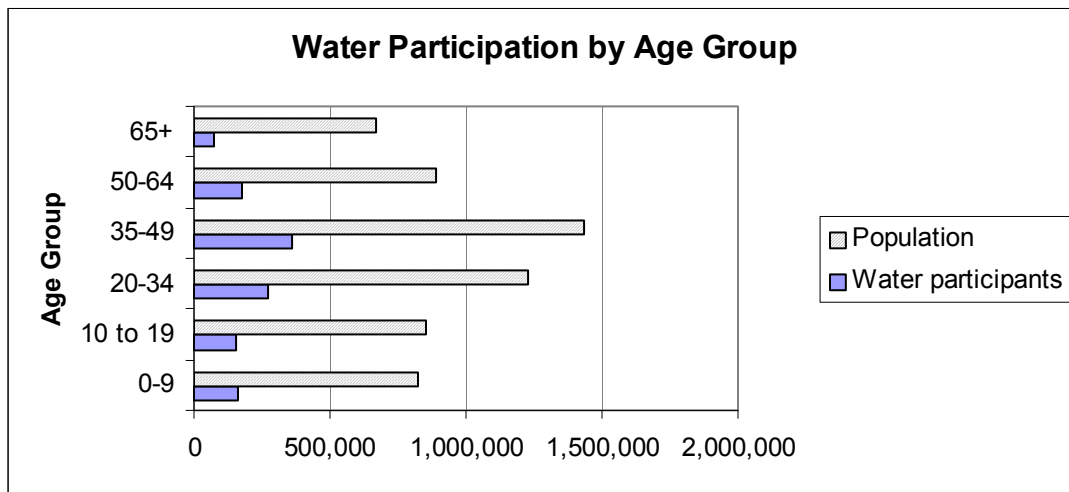
Non-pool swimming projected to grow 19% and 29% respectively.

Rafting, 20% and 30%.

Canoeing, 21% and 30%.

Visiting a beach, 21% and 33%

*Age Group Trends*



Participation by age group in Washington State is generally in proportion to the size of each age group, with the exception of teenagers (who may resist family trips to the water).

*Estimates of Resource and Facility Availability*

*For swimming and wading:* Swimming and wading will take place at swimming pools, lakes, streams, rivers, and salt water beaches. The inventory of swimming pools has not been updated since 1990, when IAC reported 529 public swimming pools statewide.<sup>30</sup> Because of high construction and operating costs, few new public pools have come on-line since then. Many pools built with Land and Water Conservation Funds (LWCF) and other public dollars in the 1960s and 1970s are in need of major renovation or replacement.

Non-pool access sites are numerous: in Puget Sound and the Straits of Juan de Fuca, there are over 450 sites where the public can physically

<sup>30</sup> Washington Outdoors: Assessment and Policy Plan 1990-1995.

access the water.<sup>31</sup> Many of these sites are usable for beachcombing type activities as well as wading. The cold temperatures of Puget Sound and the difficult surf conditions of the Pacific Ocean beaches make swimming less likely at these locations. Inland, non-pool swimming is more likely, especially in Eastern Washington during the summer.

*For power boating:* The motor boat fleet in Washington State is dominated by boats less than 26 feet in length that are towed on a trailer to a launch ramp.<sup>32</sup> Statewide, there are just over 900 launch sites on salt water, lakes, rivers, and streams.<sup>33</sup> New launch sites are rarely developed, with proponents facing significant challenges in populated areas such as Puget Sound, where developable low bank waterfront property is at a premium.<sup>34</sup> In 1998, a significant share of the inventory, about 230 sites representing about 25% of the inventory, was in poor condition, with an estimated service life of less than 5 years.<sup>35</sup> Well-constructed launch sites can be reasonably expected to have a service life of up to 20 years.

*For hand-powered boating:* Rafting and canoeing takes advantage of rivers and streams statewide.<sup>36</sup> Access is often by way of motor boat launches. Hand launch sites are less numerous statewide than motor boat launches.

*Beachcombing:* Beach visitors have access to large stretches of public beach on the Pacific Ocean. In general, State Parks manages beaches south of Moclips, and the National Park Service manages beaches north of Queets. State Park beaches allow motor vehicle access and are considered highways under state law. National Park Service beaches are managed for pedestrian access. It is unlikely that lack of supply is an issue in beach access, although there is always a dialogue concerning the balance between motor vehicle and pedestrian uses of state managed beaches.

### *User Group Organization and Representation*

There is no known user-group organization promoting non-pool swimming and wading, although interests probably overlap with water-oriented organizations such as the Surfrider Foundation. The same situation appears to exist for the beach visitor.

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<sup>31</sup> Washington State Department of Ecology BEACH program interim list, 2002

<sup>32</sup> *Statewide Recreational Boating Study, Final Report*, May 2001, BST Associates, Bothell WA

<sup>33</sup> Statewide motor boat launch inventory, IAC, 1997

<sup>34</sup> Personal communication from Washington State Parks, 1995

<sup>35</sup> See note 24.

<sup>36</sup> American Whitewater lists over 200 separate rivers and streams in Washington State (excluding multiple listings of the same river or stream) as "runnable" by kayaks and rafts. See <http://www.americanwhitewater.org/rivers/state/WA>

Rafting and other river uses are represented by American Rivers, often on a river-specific basis. Canoe-kayak interests are represented by Washington Water Trails and other organizations.

Motorboat groups include the Recreational Boating Association of Washington (RBAW), representing yachting and cruising interests. Groups representing small boat owners are less visible.

### *Land Use and Land Designations*

Swimming access usually depends on a designated park or recreation site. Beach visitation and beachcombing participation would be impacted by any change in management emphasis of state-owned Pacific Ocean beaches, with the elimination of motor vehicle access likely to result in a decline in total visitation.

Surface water use is subject to zoning and designation such as no wake zones, no discharge zones, and non-motorized zones. Impacts to motor boating and canoeing-kayaking are obvious. Alterations in river hydrology (for example a diversion dam) will affect rafting and other uses.

### *Other Factors*

Swimming, wading, surfing, SCUBA diving, and other water-contact activities are directly affected by water quality, including pollution and the presence of noxious weeds.

Motor boating appears to have strong links to recreational fishing as well as general economic conditions.<sup>37</sup> The motorboat community enjoys some dedicated public funding for public agencies providing boating sites and facilities, including Clean Vessel Act grants and Boating Facility Program grants.

### *Discussion*

*For swimming and wading:* IAC agrees with NSRE projections for non-pool swimming and beach visitation.

*For motor boating:* Motor boating data from other studies leads IAC to conclude that motor boating will grow quite slowly, at about 10% over ten years, with the potential for a plateau or even decline after 10 years to the

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<sup>37</sup> Personal communication from the Northwest Marine Trade Association.

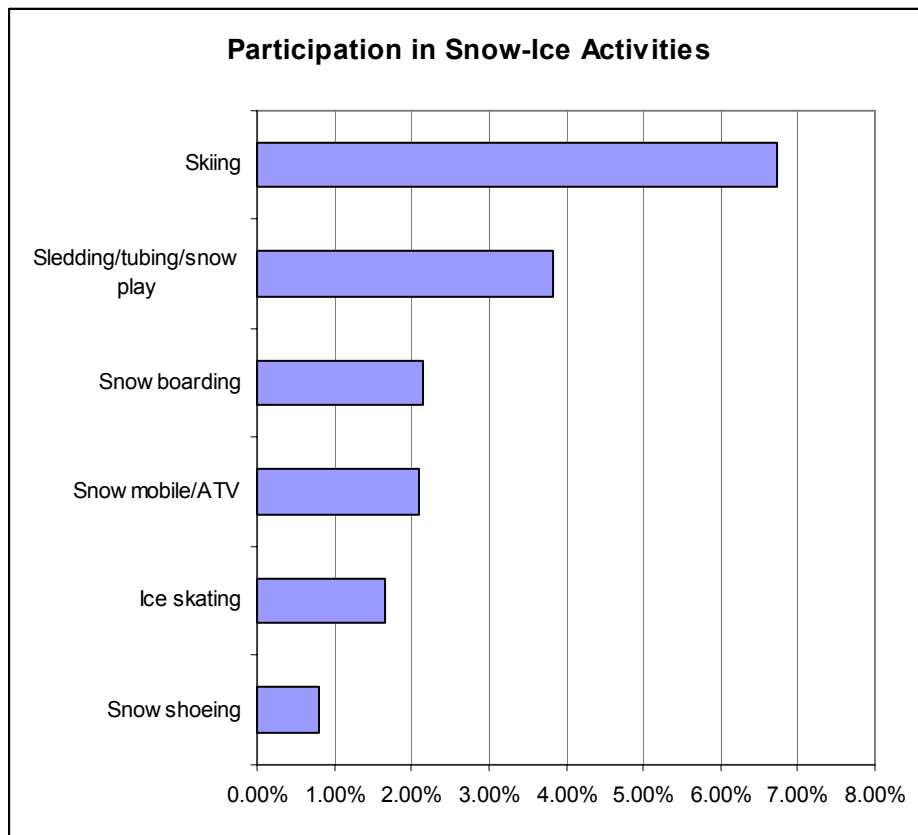
year 2020.<sup>38</sup> Slow growth in the inventory of boating facilities and continued decline in fishing participation are likely causes.

*For hand-powered boating:* In contrast, the count of hand-powered watercraft statewide appears to be growing rapidly, about 55,000 canoes and kayaks in 1994-95, compared to 84,000 in 2001.<sup>39</sup> Therefore, NSRE projections can be used with some confidence for canoe and kayak use. Rafting participation will probably grow at a rate comparable to motor boating.

## Snow-Ice Activities

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Snow and ice activities include skiing (downhill and cross country), sledding-tubing and general snow play, snowboarding, snow mobile riding, snow shoeing, and ice skating.

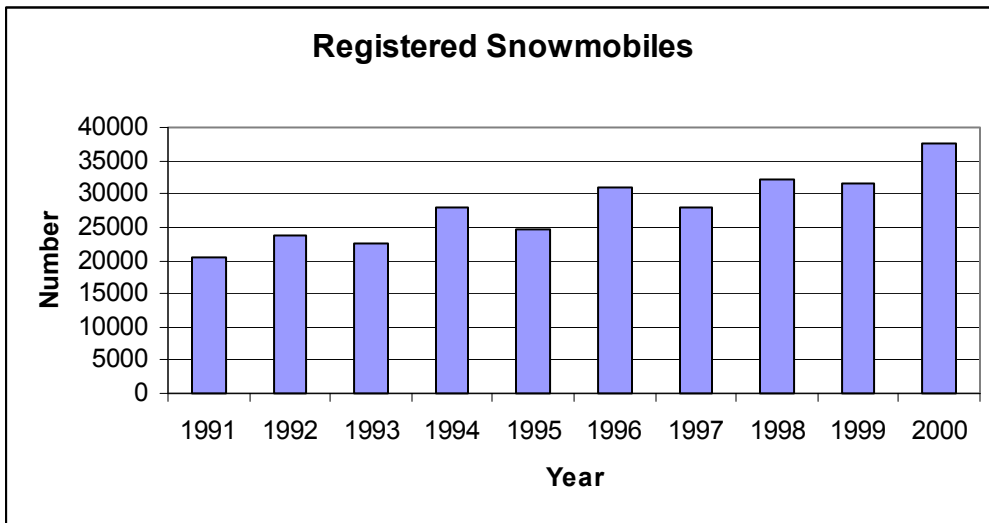


<sup>38</sup> A separate IAC-sponsored study concluded that motor boating grew about 1.9% per year between 1990 and 2000, with growth slowing to 1.1% annually in the second half of that period. *Statewide Recreational Boating Study, Final Report*, May 2001, BST Associates, Bothell WA

<sup>39</sup> 1994-95 data from unpublished report by Amjoun Associates, 2001 data from *Statewide Recreational Boating Study*, BST Associates under contract to IAC.



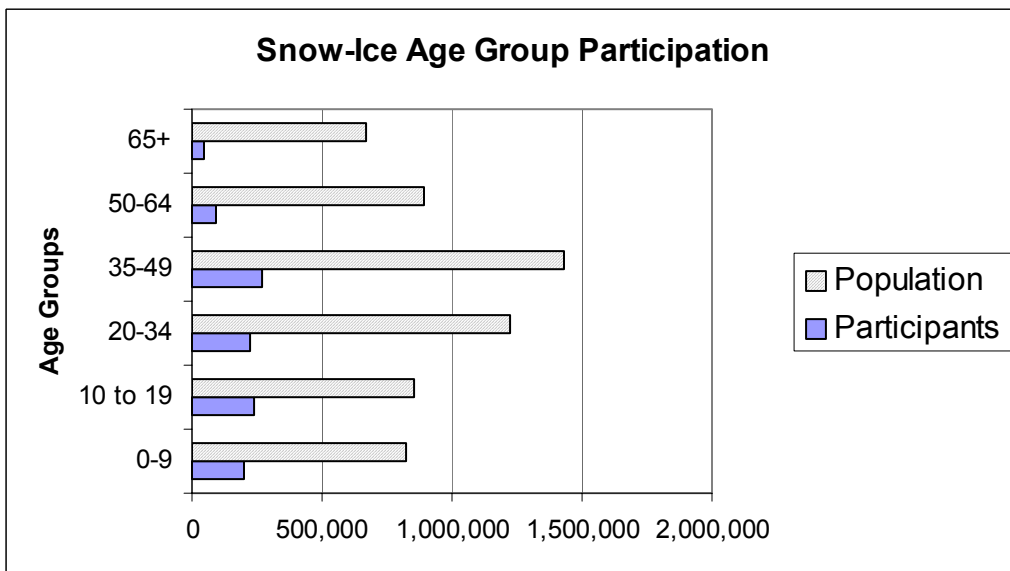
Worth noting is a growth trend in the number of registered snowmobiles.<sup>40</sup>



*NSRE Estimates for the Pacific Region, Including Washington*

NSRE projects growth in the following winter activities:  
 Down hill skiing, 21% in 10 years and 31% in 20 years.  
 Cross-country skiing, 23% in 10 years and 33% in 20 years.  
 Snowmobile riding, 42% in 10 years and 54% in 20 years.

*Participation by Age Group in Washington State*



<sup>40</sup> Washington State Data Book 2001, Office of Financial Management

Of note is that teenagers show more relative participation under this category than in preceding categories. Also, there is no jump in participation among people ages 20-34. This may reflect early and somewhat enduring interest in activities such as skiing and snow boarding (although it may be too early in the history of boarding to pronounce any real trends). Decline in participation among older adults may reflect the stressful nature of winter activity (cold conditions combined with activities that are hard on knees and hips).

### *Estimates of Resource and Facility Availability*

Generally, these are winter activities that take place in mountainous settings. Washington's geography, if not weather, lends itself to snow and ice activity.

The Pacific Northwest Ski Areas Association lists 14 members in Washington, representing the predominant supply of down hill ski facilities.<sup>41</sup>

Snowmobile use takes place on state and federal lands. The supply of state and federal lands is stable.

### *User Group Organization and Representation*

A number of user groups are well organized and active at the state level, including but not limited to the Washington State Snowmobile Association, the Washington State ATV Association, and the Washington Ski Touring Club. Other outdoor organizations such as The Mountaineers and the Sierra Club have interest in cross-country skiing and snowshoeing. "General snow play" does not have a known user group.

### *Land Use and Land Designations*

Major federal land designations or prescriptions such as Wilderness or semi-primitive non-motorized recreation will determine the type of winter use. Dense development (e.g., ski areas) and motorized uses (snowmobiling) cannot take place under these designations. Cross-country skiing and snowshoeing are allowed.

Roaded timber lands, public and private, are used for winter recreation of all kinds, no doubt due to somewhat convenient access.

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<sup>41</sup> Limited downhill skiing opportunity is found in Mount Rainier and Olympic National Parks, and "die-hard" independent skiers may be found on slopes of high peaks scattered around the Cascades and Olympic Mountains.

## *Other Factors*

Snowmobiling and cross-country skiing enjoy on-going funding through the State of Washington's Winter Recreation (Sno-Park) program, providing a somewhat stable inventory of parking areas and snow trails. Improved technology including quieter engines and lighter machines that are easier to use may be one factor encouraging more snowmobile use. Improved technology has also encouraged people to try downhill and cross-country skiing, as well as snowshoeing. General economic conditions that increase disposable income will greatly influence whether people buy new machines and equipment, or ski in state as opposed to travel elsewhere. If global warming results in shorter winters with less snow, all participation in this category will be affected.

## *Discussion and Conclusion*

There is no reason to believe that the statewide inventory of winter sport facilities will increase appreciably in the next 10 to 20 years. The challenge will be to sustain the current inventory over time, perhaps expanding existing sites to accommodate increased use.

Increases in snowmobile registration as noted above may not reflect actual growth in participation over the past 10 years: for various reasons, more people may be choosing to register more consistently. Nevertheless, when weighing anecdotal evidence that more, newer, and technologically improved machines are increasingly visible in the field,<sup>42</sup> even a conservative interpretation of the registration data suggests that there is real growth in actual participation. The question is whether the growth of well over 50% in 10 years can be repeated.

If growth in snow-ice activities approaches the levels estimated by NSRE, considerable crowding should be expected. In socially-oriented sports such as downhill skiing, snow play, and snow mobile use, crowding may be more readily tolerable. Conversely, crowding may discourage participation in cross-country skiing and snowshoeing (activities that tend to attract people more interested in a quiet, nature-oriented experience).

IAC therefore concludes that NSRE estimates for snowmobile, downhill skiing, and cross-country skiing growth over 10 years may be used to some confidence, but projections to 20 years should be used with caution.

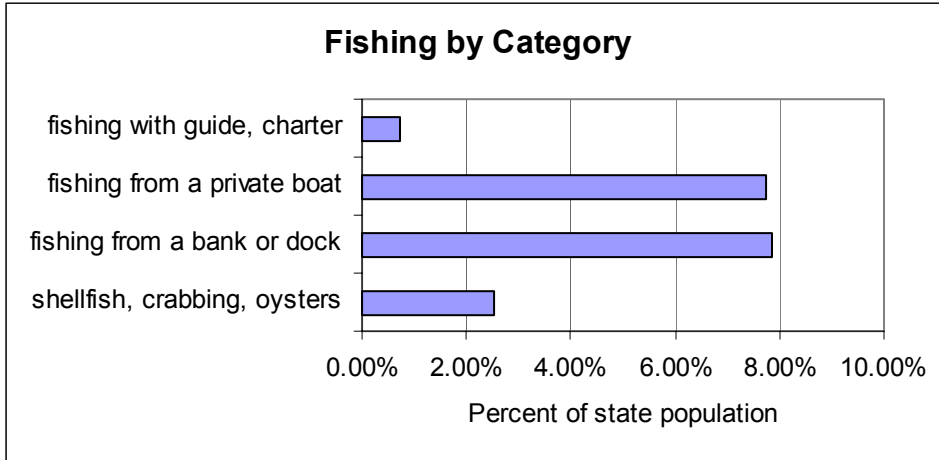
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<sup>42</sup> Personal communication from US Forest Service to IAC, 2002

## Fishing

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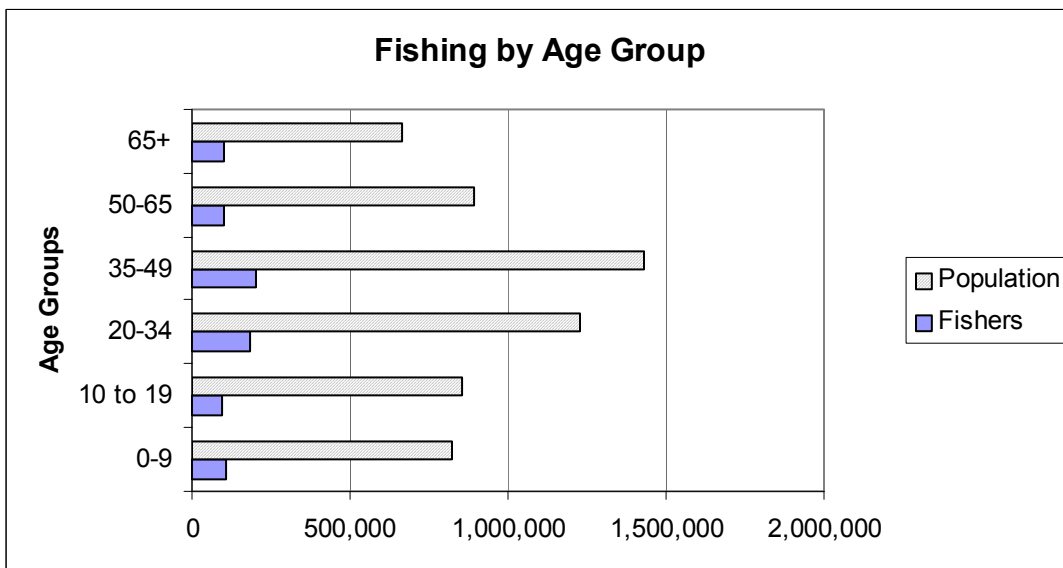
Fishing is individual sport fishing, whether on a self-directed or guided trip, from a boat, bank, or a dock. It also includes recreational harvest of shellfish, crab, and oysters.



### *NSRE Estimates for the Pacific Region, Including Washington*

NSRE projects modest growth for fishing, at 12% over 10 years and 20% over 20 years.

### *Participation by Age Group in Washington State*



Fishing tends to attract adults. It is not uncommon to hear adults comment that children are "out of touch" with traditional outdoor activities

such as fishing.<sup>43</sup> However, fishing participation does appear to endure with age, unlike participation in more physically demanding pursuits such as field sports.

### *Estimate of Resource and Facility Inventory Availability*

Fishing depends on the availability of fish. Whether due to perception or to actual decline in available fish, data from the Washington Department of Fish and Wildlife (WDFW) shows a steady decline in the sale of fishing licenses over the past 10 years. This confirms the downward trend in fishing as indicated in IAC data gathered over the past 20 years (compare charts 1 and 3).

Hatchery planted salmon have declined from 259 million pounds in 1990 to 162 million pounds in 2000, with a decline in adult returns of many species.<sup>44</sup> Hatchery planted trout of various species has remained relatively constant during the same years.<sup>45</sup>

With steady growth in the human population at the same time there are declines in the numbers and distribution of fish, both wild and hatchery, it is not unreasonable to determine that fishing is experiencing a discouraging trend.

### *User Group Organization and Representation*

Important national and state organizations are active in Washington. From Fish First to Friends of the Cowlitz, Trout Unlimited to Long Live the Kings, user groups are determined and resilient.

### *Land Use and Land Designations*

The relationship between land uses and salmon habitat are too complex to be addressed in a satisfactory manner in this report. It can be said, however, that timber harvest, farming, urban development, hydroelectric development, and other land uses have had an appreciable adverse impact on salmon and other fish.

Protection represented by wildlife recreation areas, Wild and Scenic Rivers, conservation easements, and other means are available and widely used.

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<sup>43</sup> Participants in public focus groups held by IAC in March 2001

<sup>44</sup> WDFW data as reported in Washington State Data Book, OFM, 2001

<sup>45</sup> Same source as note 34.

### *Other Factors*

As mentioned above, there appears to be a decline in interest among younger generations in fishing. This has been variously attributed to other, competing leisure interests from field sports to video games and the Internet. Also, there is evidence that women are discouraged from fishing because of a tradition of male-orientation initiation into the sport, and a lack of improved facilities such as restrooms.<sup>46</sup>

### *Discussion*

IAC believes that the trends of the past 20 years contraindicate future growth in fishing. Unless there is considerable improvement in the numbers of fish available for recreational harvest, continued declines can be expected.

IAC estimates that fishing as a percent of population will decline 5% over 10 years and continue to decline as much as 10% over 20 years.

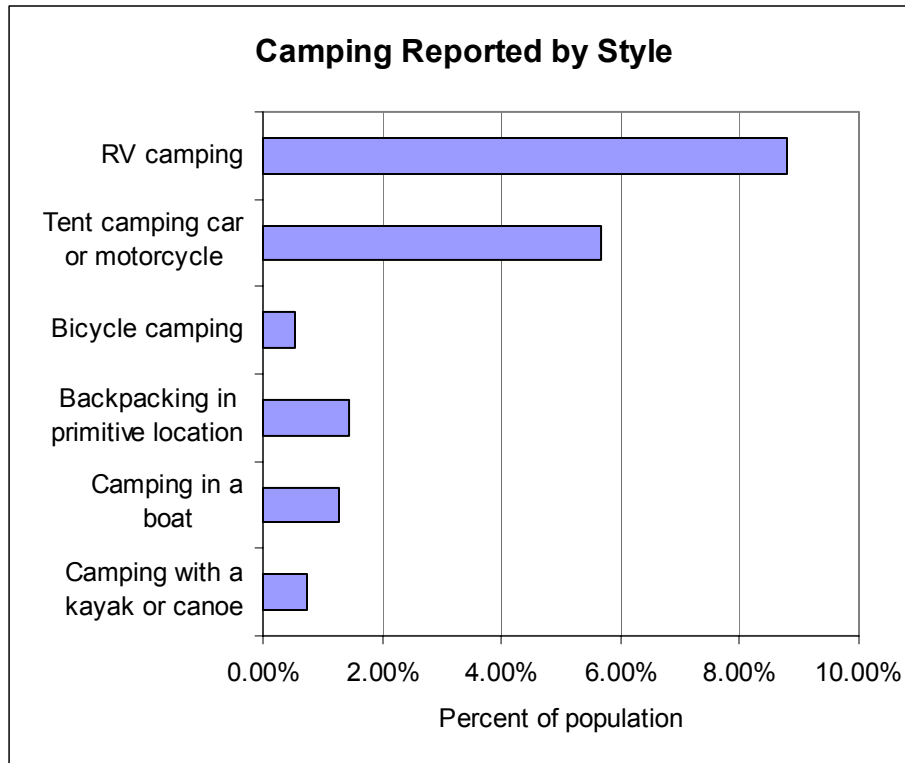
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<sup>46</sup> Personal communication from the Oregon Marine Board

## Camping

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Camping is an overnight stay in a recreational context, usually emphasizing interaction with nature away from a permanent dwelling. Camping includes use of recreational vehicles (RVs), tent camping with access via vehicle (car, truck, motorcycle, bicycle<sup>47</sup>), backpacking, and boat camping.



### *NSRE Estimates for the Pacific Region, Including Washington*

NSRE provides estimates for two styles of camping:

*Primitive camping* (e.g., dispersed<sup>48</sup> vehicle camping), estimated to grow 13% in 10 years and 23% in 20 years.

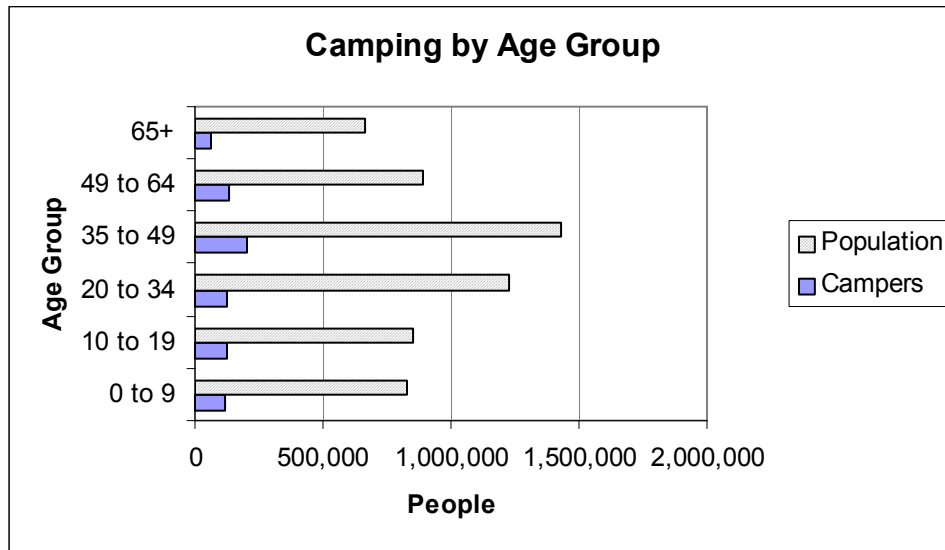
*Developed camping* (e.g., in a camp ground with a variety of amenities), estimated to grow 19% in 10 years and 32% in 20 years.

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<sup>47</sup> A bicycle rider is considered the operator of a vehicle under state law (RCW 46.61.755)

<sup>48</sup> Dispersed means scattered and implies camping at informal or undesignated sites such as a pull out on a forest road.

## Participation by Age Group in Washington State



It is likely that camping styles change with age. Younger people are probably more likely to take part in primitive camping. Older adults are more likely to camp in RVs.<sup>49</sup> There is evidence that special niche markets may be emerging, for example single mothers who wish to camp with their children using a yurt or simple cabin for convenience and perceived safety.<sup>50</sup>

### *Estimate of Resource and Facility Availability*

In 1990, IAC reported that over 60% of all camp units were provided by private operators.<sup>51</sup> Since 1990, the inventory of public campgrounds has grown only marginally; for example, only one State Park with significant camping has been added to the system in about 20 years (Rasar State Park). The Department of Natural Resources, on the other hand, is in the process of closing campgrounds in so-called urban interface forests. National Forests and National Parks generally appear to be renovating and maintaining campgrounds, not adding capacity.

Backpacking in Washington State is most attracted to National Parks and National Forests, especially to Wilderness areas. In designated Wilderness, campsites are strictly controlled in terms of party numbers and party size. Even climber's bivouacs<sup>52</sup> on Mount Rainier are controlled by permit. Dispersed Wilderness camping is allowed where impacts to

<sup>49</sup> More RVs are now owned by people aged 35 to 54 years than any other group, University of Michigan, 2001, study commissioned by the Recreation Vehicle Industry Association.

<sup>50</sup> Convenience Camping Structures in State Parks, Hovis, Washington State Parks, 2001

<sup>51</sup> Washington Outdoors: Assessment and Policy Plan 1990-1995

<sup>52</sup> A bivouac is an open-air rest using minimal gear.



natural processes are minimal, for example on rocky flats or snow. Due to these kinds of restrictions, the “supply” of backpacker-style camping sites on federal Wilderness lands should be considered static.

Boat camping can take place on the boat itself in the case of people on a larger motorboat: protected moorage or anchorage is the base requirement. Kayakers, on the other hand, need to exit the water at low-bank sites. Inventory of designated moorage sites for boaters is static, while numbers of “water trail” campsites for the kayak or canoe user is growing slowly.

While exact numbers are unknown, it is assumed that the bulk of the camp unit inventory continues to be private. The largest single camping development statewide in the past decade appears to be the 7,800-unit site at the Gorge Amphitheater concert site near George, provided as a means of low-cost accommodation for concert attendees.

### *User Group Organization and Representation*

Camping groups tend to be RV membership organizations such as The Good Sam Club or members of Kampgrounds of America (KOA)®. These clubs take a strong interest in state services including campground access and amenities provided at safety rest areas. Membership organizations such as Boy Scouts and Girl Scouts often own or lease their own sites, perhaps with less emphasis on use of public camping facilities.<sup>53</sup>

Groups interested in more primitive camping tend to be trail-oriented groups such as Backcountry Horsemen or outdoor conservation groups such as The Mountaineers. Land access and protection dominates the agenda of these organizations.

Boating organizations have helped to preserve public access sites statewide. A notable example is Sucia Island State Park. The Washington Water Trails Association has an impressive record of establishing campsites for users of hand-powered boats in Puget Sound.

### *Land Use and Land Designation*

As mentioned above, primitive camping such as backpacking is restricted by federal Wilderness designation. Developed camping will be influenced by zoning (where an RV park may be sited), habitat constraints, road access, and other factors. Boat camping may be limited by designations such as no-anchoring zones and marine protected areas.

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<sup>53</sup> Boy Scouts of America operates 420 campgrounds nationally.

## *Other Factors*

Total numbers of people who reported camping in IAC surveys in 1979 and 1999 indicate an overall decline. In 1979, about 24% of a population of roughly 3.9 million -- 947,000 people -- were estimated to participate in camping. In 1999 about 13% of a population of 5.8 million -- 754,000 people -- were estimated to participate. In spite of this drop in participation, the most desirable State Park campgrounds continue to fill to capacity simply because of a limited supply of available camp units (about 8,000).

Meanwhile, the number of registered motor homes in Washington State grew well over 40% between 1991 and 2000, from 60,375 units to 85,850 units.<sup>54</sup> The use of campers (e.g., an accessory unit placed in the bed of a pickup truck) declined during the same period: 48,675 in 1991 and 37,695 in 2001 (23%).<sup>55</sup>

With evidence of increased use of larger RVs, IAC agrees with the NSRE that RV-style camping will grow, but in view of the 20-year decline in total numbers of people camping we suggest that a slower rate of growth may be experienced.

We also suggest that boat-in camping will grow at the rate of boating generally, that is about 1% a year for 10 years and remaining steady after that.

Primitive dispersed camping is under pressure due to environmental concerns, especially water quality and wildlife habitat.<sup>56</sup> It is likely that primitive dispersed camping will come under tighter management control over the next ten years, resulting in some loss of opportunity. Minimal growth can be expected, perhaps in the range of 5% over 10 years. A high level of uncertainty inhibits an estimate for a 20-year period.

Considering the limitations on major lands used for primitive camping, IAC must disagree with NSRE's projections for primitive camping. IAC estimates that backpacking participation will grow only in the sense that more Washington residents will find it necessary to travel out of state to find the solitude they might seek, resulting in slight growth, at about 5% for 10 years and about 8% over 20 years.

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<sup>54</sup> Department of Licensing data reported in Washington Data Book 2001, OFM

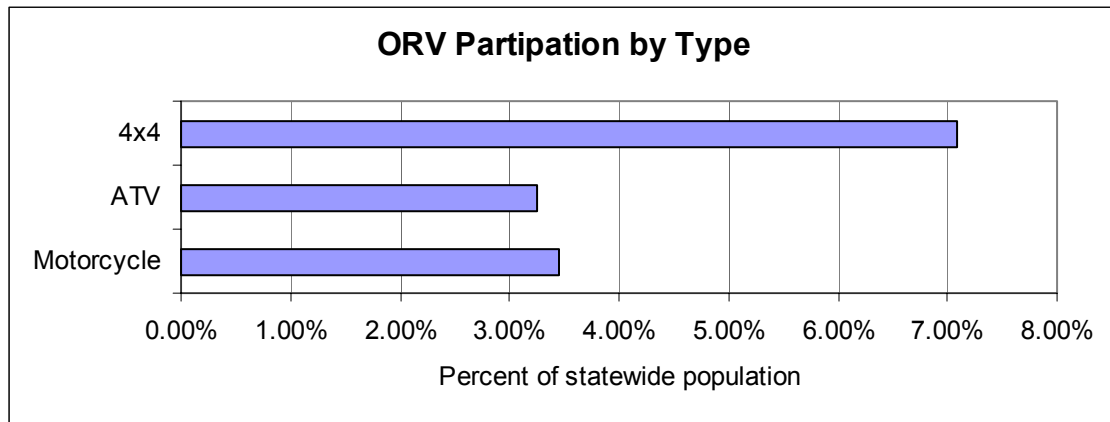
<sup>55</sup> Same source.

<sup>56</sup> Recreation studies associated with Federal Energy Regulatory Commission license applications for by Grant PUD (2000), Puget Sound Energy (2000-2001), and PacifiCorp (2000).

## Off-Road Vehicle Riding

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Off-road or nonhighway<sup>57</sup> vehicle riding includes the recreational use of dirt bikes, all-terrain vehicles, utility 4x4 vehicles such as the Jeep®, and 4x4 trucks and sport utility vehicles (SUVs). Such use can be on trails, in open areas, or on nonhighway roads. "Nonhighway" is defined as a road not constructed or maintained by state motor fuel taxes and includes federal roads such as Forest Service access and logging roads, and state roads managed by the Department of Natural Resources (forest roads), and the Department of Fish and Wildlife (roads found in wildlife recreation areas).



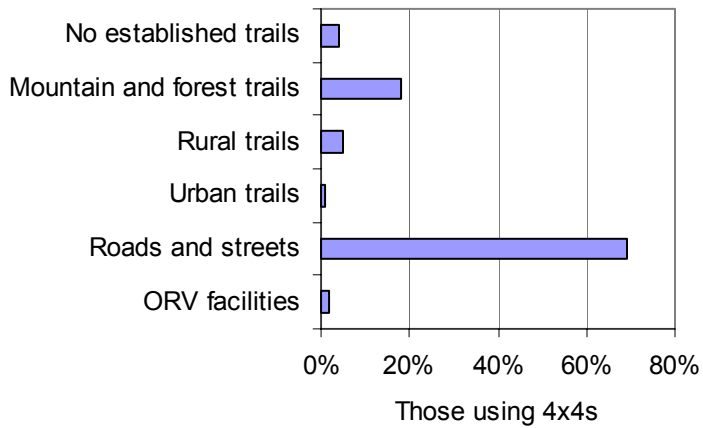
While at first appearing counter-intuitive, a significant amount of ORV/OHV use is on road systems, probably federal, state, and private forest roads.

There may be significant overlap between 4x4 vehicles used for daily transportation and off-road recreation. Department of Licensing reported only 61,308 registered off-road vehicles in 2000, but the IAC-commissioned 1999-2000 statewide study reports that 7% of the state's population, at least 400,000 people, participates in 4x4 activity. Therefore, most people in this category must be riding in street-legal 4x4s, off-road capable trucks, and perhaps even sport utility vehicles that are registered as passenger vehicles and not as off-road vehicles.

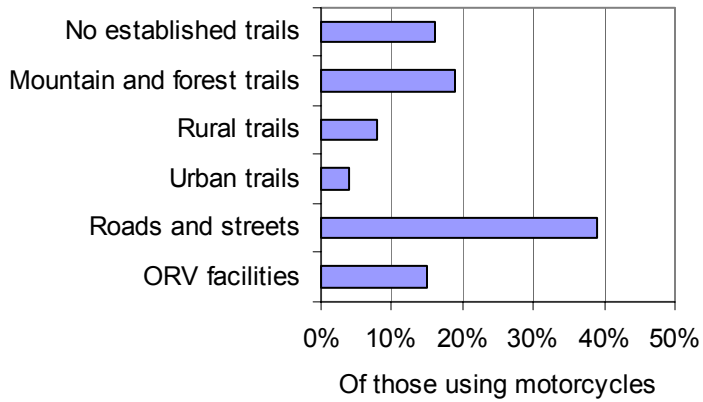
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<sup>57</sup> State law (RCW 46.09.020) uses the following definition: "Nonhighway vehicle" means any motorized vehicle when used for recreation travel on trails and nonhighway roads or for recreation cross-country travel on any one of the following or a combination thereof: Land, water, snow, ice, marsh, swampland, and other natural terrain. Such vehicles include but are not limited to, off-road vehicles, two, three, or four-wheel vehicles, motorcycles, four-wheel drive vehicles, dune buggies, amphibious vehicles, ground effects or air cushion vehicles, and any other means of land transportation deriving motive power from any source other than muscle or wind.

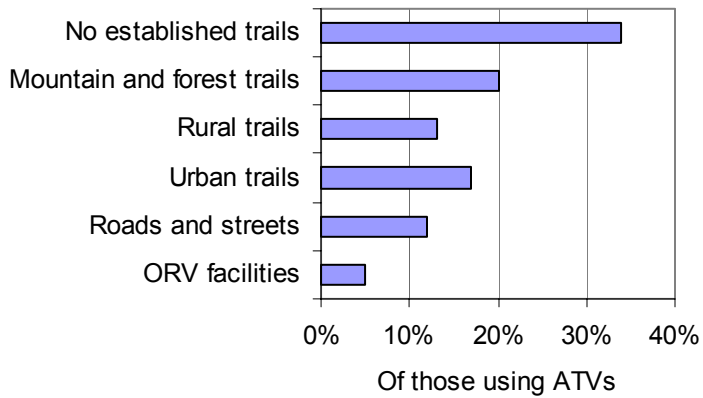
### Where People Report 4x4 Use



### Where People Report Motorcycling



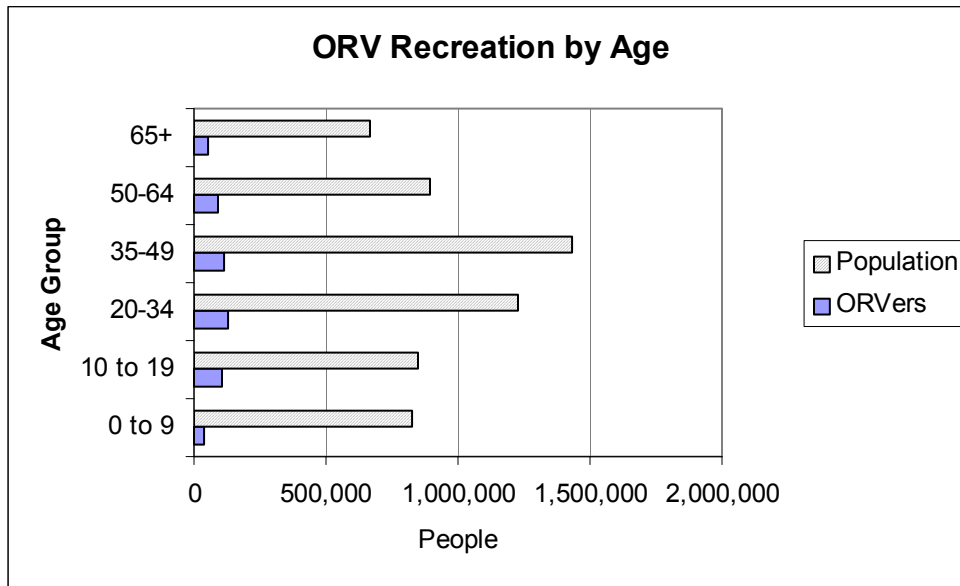
### Where People Report ATV Use



*NSRE Estimates for the Pacific Region, Including Washington*

NSRE projects “ORV driving” to grow about 1% per year: 10% in 10 years to 20% in 20 years.

*Participation by Age Group in Washington State*



Of note is the higher participation among young adults, especially age 20-34. This finding is consistent with results of the 1986 *Washington State Off-Road Vehicle Study*,<sup>58</sup> which found that half of all ORV users were under 34 years of age.

*Estimates of Resource and Facility Availability*

ORV use occurs on roads and trails, on private forest land, in designated open riding areas (e.g., sand dunes), informal sites such as urban/suburban lots, and at ORV sports parks. Roads and trails are located on state and federal land, especially National Forest land. In 1991, the IAC reported that ORV users had access to more than 20,000 miles of road and 2,400 miles of trail.<sup>59</sup>

Of interest is the use of user-made trails on private and public land. In the Jones Creek area, the Department of Natural Resources constructed and mapped an official 13-mile trail; a local user group has established another 60-70 miles of unofficial but “rideable” trail.<sup>60</sup> Users sometimes cannot differentiate between official and user-made trails, a situation that creates

<sup>58</sup> Matrix Management and Gilmore Research Group, under contract to IAC

<sup>59</sup> Washington State Trails Plan, IAC, 1991

<sup>60</sup> Internet page of the Jones Creek Trail Riders, July 2001

confusion among users and managers alike. The Department of Natural Resources is noted for its good faith efforts to work with motorized user groups on finding ways to integrate the user-made system with official system trails.

On federal land, very few miles of motorized trail have been purpose built. Most motorized trails are established trails that have proven to be attractive to and manageable for motorized use. Statewide, there are two public ORV sports parks.<sup>61</sup> A handful of private ORV tracks are in operation, but the exact number is not known.

In brief, the inventory available for ORV use is currently static and is not expected to change in the foreseeable future.

### *User Group Organization and Representation*

A number of user groups are well established and influential at the state level. These include the Pacific Northwest 4-Wheel Drive Association, the Northwest Motorcycle Association, and the Washington ATV Association. In addition, any number of local clubs are active not only as recreationists but also as highly-valued volunteers on stewardship projects.

### *Land Use and Land Designations*

ORV recreation is restricted or prohibited by important federal land use designations including most National Parks and all Congressionally-designated Wilderness areas. State land designations such as natural areas also restricted ORV use. At the local level, riding on open private land may be tolerated for a considerable period of time, only to be “shut down” when the land is sold or developed. ORV users are generally aligned with the “multiple-use” school of land management, especially on National Forests and state trust lands. ORV use appears to tolerate timber activity and will even take advantage of industrial sites such as gravel pits, although such locations are probably not preferred.

### *Other Factors*

The ORV community enjoys a dedicated state funding source that pays for the stewardship of trails and riding areas. ORV recreation has enjoyed improved technology over the past decade, including lighter, easier to steer, more powerful machines and better noise control.

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<sup>61</sup> A third, owned and operated by Thurston County, was closed in late 2002.

*Discussion*

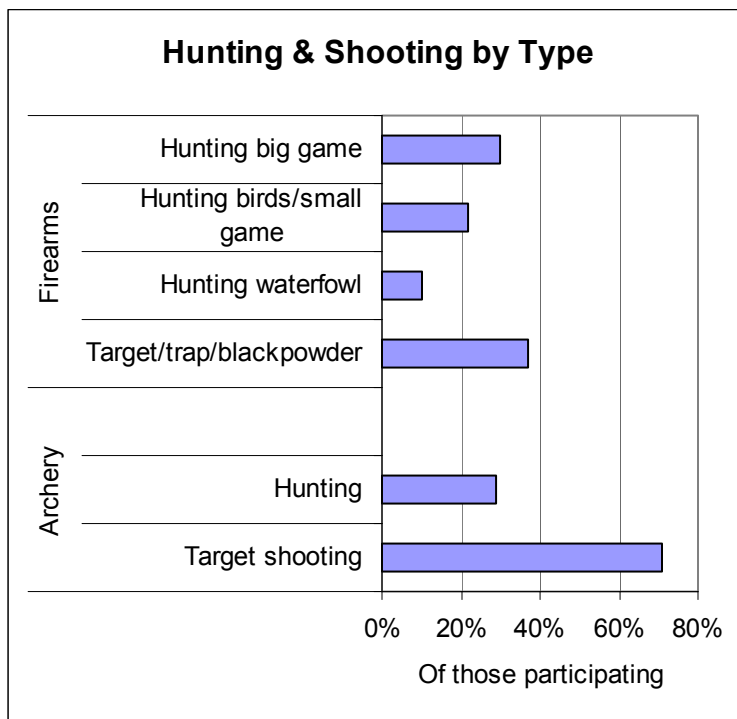
ORV recreation has established itself as a legitimate pursuit with statutory support, and an on-going funding source.

IAC concurs with the NRSE estimates for ORV growth over the next 10- and 20-year periods.

***Hunting and Shooting***

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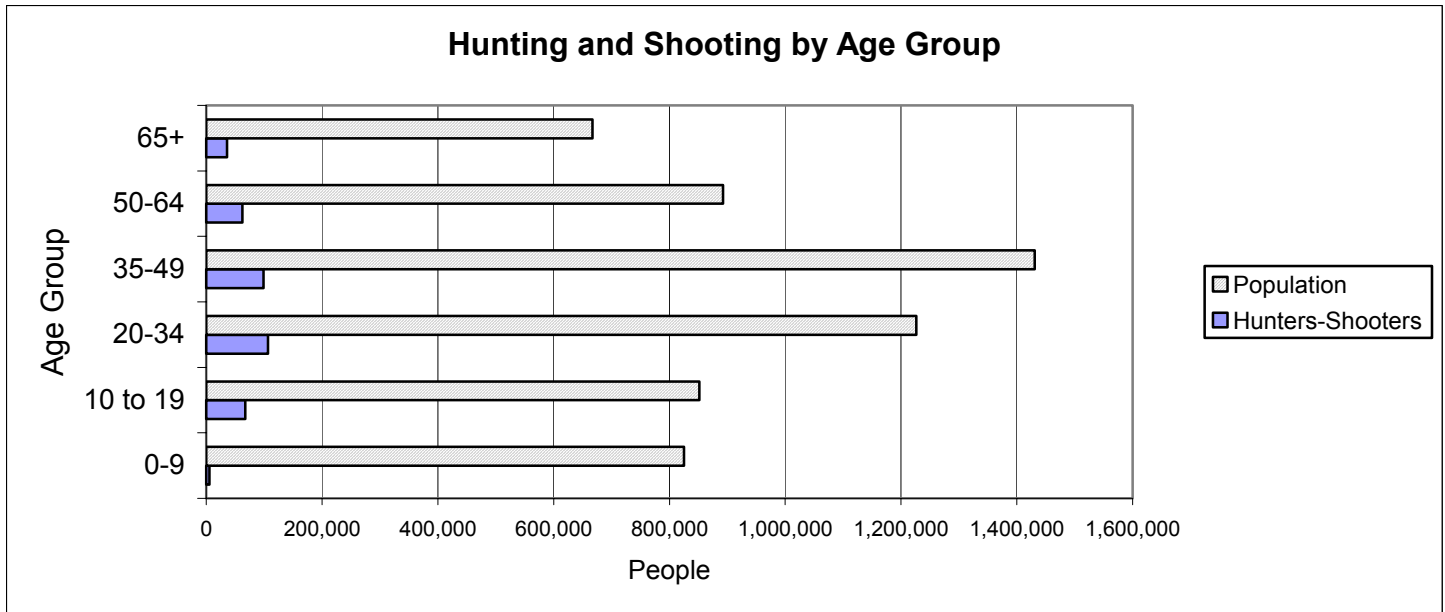
Hunting is the lethal pursuit of legally-established target birds and animals. Shooting is the use of firearms or archery equipment aimed at non-living targets.



*NSRE Estimates for the Pacific Region, Including Washington*

NSRE addresses hunting but not shooting sports. Hunting is the only activity in the NSRE report that is projected to decline: down 15% over current levels in 10 years and down 21% over current levels in 20 years.

*Participation by Age Group in Washington State*



Hunters tend to be age 34 and older.<sup>62</sup> Of note from other studies is that hunting participation is dominated by males, with over 90% of the participation being male.<sup>63</sup>

*Estimate of Resources and Facility Availability*

Hunting depends on a supply of target birds and animals. According to Washington Department of Fish and Wildlife, herds of elk and deer have been stable over the past several years. Bird populations, including waterfowl, are more variable; hunting license sales tend to mirror the animal population trend.<sup>64</sup>

When considering the state’s pattern of human development, it is unlikely that populations of target species can be appreciably increased.

<sup>62</sup> See also Draft Environmental Impact Statement for the Game Management Plan, July 2003-June 2009, Washington Department of Fish and Wildlife

<sup>63</sup> Washington Hunters’ Opinions on and Attitudes Toward Game Species Management, conducted for the Washington Department of Fish and Wildlife by Responsive Management, March 2002

<sup>64</sup> WDFW data reported in 2001 Washington State Data Book, OFM



### *User Group Organization and Representation*

Hunters are well organized and effective at the state level. Groups including the Rocky Mountain Elk Foundation and others work at the state and local level, and offer valuable in-field assistance with volunteer stewardship efforts.

### *Land Use and Land Designation*

With respect to hunting, land use is of greater importance than land designations. It has been found that "... the correlation between land ownership and habitat value is not straightforward. Habitat value depends less on ownership than it does on how land is managed. Functional as well as degraded habitat can be found on all kinds of land, regardless of ownership." Further, "... numbers of acres of land do not convey much information about the value of that habitat. Because direct measurement of habitat is difficult and costly to carry out, scientists and planners often use indirect measures, such as land cover, particularly for broad-based assessments."<sup>65</sup>

As more land is developed for homes and businesses, it will become increasingly difficult to support hunting activities.

### *Other Factors*

Social support for hunting is uncertain. WDFW reports that a survey of the state's general public found that hunting for the purpose of obtaining a trophy is not supported by the general public; that hunting contests are not supported; there is less support for hunting cougar, black bear, and fur-bearing animals than other game species; a majority of residents do not support introduction of non-native species, while a strong majority of hunters support the idea; and 64% of those surveyed do not think it is WDFW's role to encourage participation in hunting.<sup>66</sup>

In a series of focus group meetings held in 2001, IAC found that adults are concerned that young people do not participate in "traditional" outdoor activities including hunting, fishing, and camping.

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<sup>65</sup> The 1999 Public and Tribal Lands Survey, Final Report, December 2001, IAC

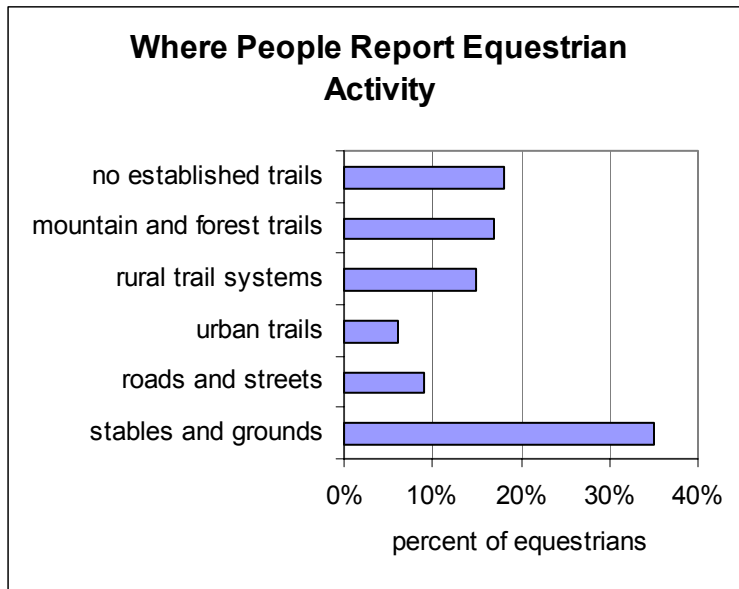
<sup>66</sup> Same reference as note 63.

*Discussion*

IAC agrees with NSRE projections. Hunting participation as a percent of total population will continue to decline for the foreseeable future.

***Equestrian Activities*** \_\_\_\_\_

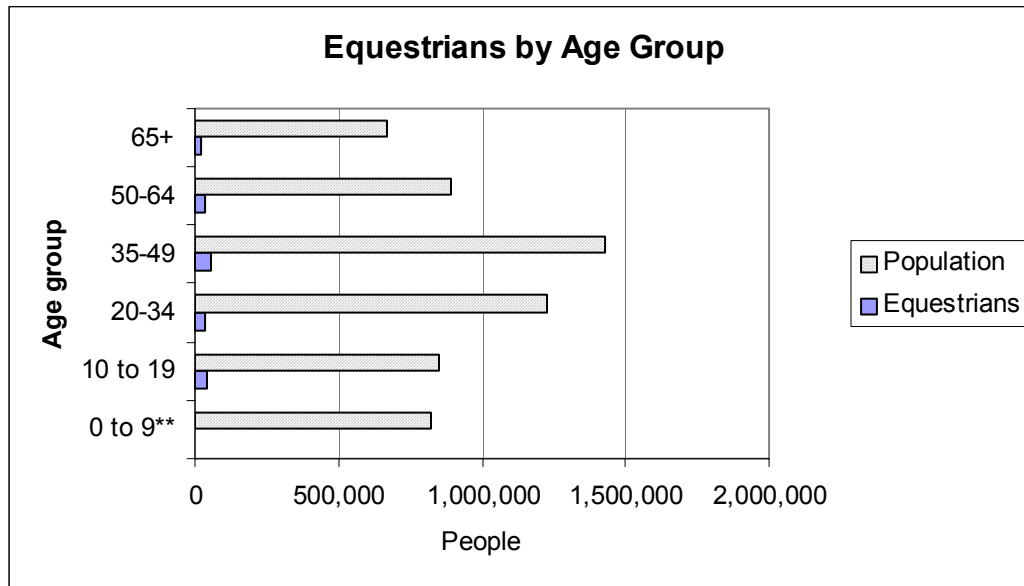
This activity focuses on the recreational use of horses, primarily for riding or show.



*NSRE Estimates for the Pacific Region, Including Washington State*

NSRE estimates 10-year participation growth at 18% and 20-year growth at 29%.

### Participation by Age Group in Washington State



\*\* Too few surveys were returned to produce reliable data.

Of interest is that slightly more teenagers participate than young adults.

### Estimates of Resource and Facility Availability

IAC does not have data concerning the number of stables or riding grounds statewide. Presumably, many of these facilities are private, including a high incidence of facilities associated with larger homes and ranches.

For trail riders, there about 7,000 miles of trail open to horse use.<sup>67</sup> The majority of these miles are on federal lands, at higher elevations, and inaccessible during the snow season.

### User Group Organization and Representation

Numerous groups represent the interest of equestrians, from 4H Clubs to local riding clubs. Statewide, Backcountry Horsemen is a highly visible group that provides assistance to state and federal land managers, contributing many hours of volunteer effort on stewardship projects.

### Land Use and Land Designations

Equestrian activities are associated with rural settings. As populated areas grow and rural land is transformed into housing and business

<sup>67</sup> Washington State Trails Plan, IAC, 1991

developments, equestrian use will have difficulty sustaining itself.<sup>68</sup> Equestrians will find themselves, like nearly all other recreationists, competing for available land and resources.

Equestrian use of private forestland is common, as is use of public timber lands including DNR trust properties. National Parks and National Forests offer highly aesthetic settings that attract horse packers.

### *Other Factors*

Equestrian use appears to enjoy widespread social support. State law recognizes equestrian use of trails and paths.<sup>69</sup> Equestrian groups have been active in securing funding for trails and other facilities through federal and state program.

### *Discussion*

The rural lifestyle associated with equestrian activities is under enormous pressure from land development statewide. Horseback riding is a well-established activity, but it has demonstrated relatively low participation for the past 20 years. There is no reason to believe that significant growth will take place over the next 20 years.

IAC does not concur with NSRE estimates. IAC suggests that equestrian activity will grow only marginally, more slowly than general population growth. IAC estimates that growth will be about 5% over 10 years and about 8% over 20 years.

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<sup>68</sup> Personal communication to IAC, equestrian representative to the State Trails Advisory Committee

<sup>69</sup> 47.30 RCW

## *Air Activities*

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Air activities include flying aircraft, hang gliding, bungee jumping, and paragliding.

Unfortunately, the most recent statewide survey published by IAC had insufficient returns to report on this category. Also, NSRE does not list these activities in its growth projections.

We assume some level of participation, up to 5% of the state's population, but we do not make a projection on future participation.

## Conclusion

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As IAC reports in *An Assessment of Outdoor Recreation in Washington State* (2002)

Outdoor recreation is complex: this *Assessment* is able to report on at least 170 different types of outdoor recreation in 15 major categories. This complexity reflects the diversity of the state's population and the spectrum of public interests and attitudes.

It can be reasonably assumed that outdoor recreation will become ever more complex, with variations and permutations of activities likely to abound. The public is nearly always a step or more ahead of the recreation planner or manager, and likely will stay that way.