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Outdoor Recreation Outlook 2015

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American Recreation Coalition

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

OUTDOOR RECREATION OUTLOOK 2016

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OUTDOOR RECREATION OUTLOOK 2016

OVERVIEW:

Outdoor recreation is a driving force in the American economy, generating more than \$650 billion in annual spending and supporting tens of millions of jobs across the country. Now more than ever, America's great outdoors and the opportunities for healthy, active fun it provides loom large in the public eye. Federal land and water management agencies have responded with a new focus on outreach and promotion. For the first time in 50 years, the National Park Service is undertaking a major advertising campaign. In conjunction with the NPS Centennial, this campaign – dubbed "[Find Your Park](#)" – seeks to connect a younger, more diverse American population with their natural heritage through social media, celebrity ambassadors and more. And the other federal land and water management agencies – which collectively oversee nearly one-third of the surface of this country – are getting in on the action. Capitalizing on renewed interest in public lands and waters, the agencies that manage these treasures are carrying out a White House initiative called "[Every Kid in a Park](#)" – aimed at getting all four million 4th graders and their families across the country to a state, national or local park and inspire return visits over the year with a free pass for federal sites.

Efforts to boost domestic visitation are complemented by greater federal enthusiasm in promoting America's great outdoors as a destination to international visitors. Increased participation at promotional events like [IPW](#), promotional pieces like Brand USA's giant screen film celebrating our National Parks – to be released in early 2016 – and tools such as 100 easy, pre-planned trip itineraries show that federal agencies and their partners are ready to do their part in growing international tourism to the United States to the President's desired goal of 100 million annual visitors.

As part of this renewed focus on outreach and promotion both domestically and internationally, public and private members of the outdoor recreation community are placing greater importance on the development of new outdoor apps to reach out to an increasingly younger, more diverse, urban and technologically connected population. Apps that help people plan and track hikes, book campsites while on the road, buy fishing licenses while on the water, post pictures while on a ski mountain and more are making it easier than ever for people to answer the three most basic questions of outdoor recreation as posed by Coleman USA President Dave Allen: "Where do I go, what do I do when I get there, and what do I need to bring," and as a community, we are prepared to answer like never before.

NATIONAL PARKS:

The National Park Service Centennial is in full swing, anchored by the "Find Your Park" initiative encouraging people to find national service units near them and post their experiences on social media and the Find Your Park website using #FindYourPark. The campaign also employs several celebrity ambassadors including Disney Channel Star Bella Thorn, TV personalities Bill Nye the Science Guy and Terrence J and more to engage youth and millennials across media platforms.

America's National Park System has 408 units, ranging from the best-known national

parks in the western United States, to small, urban historic sites. Overall year-to-date visitation to park service units is up 3.66% over 2014 levels, an increase of more than 8.7 million visitors. Yellowstone National Park has beaten 2014's record September numbers with more than 680,000 visitors, up from 571,000 last year. Many other units – such as the Blue Ridge Parkway, Badlands National Park, and Rocky Mountain National Park – have also seen significant attendance increases. This increase in visitation is also being felt at fee-collecting units, with a 5.73% increase in September 2015 revenues over September 2014, and a 3.07% increase for the year-to-date.

Many of the 280+ million visits to national parks rely upon services of national park concessioners including lodging, food, retail, transportation and guide services. Concessioners employ over 25,000 during peak season and are the current leaders in park promotion efforts. Support for the National Parks Promotion Council has unified federal agencies which collectively manage one-third of the nation's surface, state tourism agencies and gateway communities. Most importantly, concessioners are committed to meeting America's needs for healthier lifestyles, for better and lifelong educational opportunities, for strong local and regional economies that sustain and protect our parks, and for connecting all Americans to our parks across differences in regions, ages, income and ethnicity.

STATE PARKS:

According to the National Association of State Park Directors, America's State Parks include more than 2,200 traditional state parks and more than 7,700 additional areas that provide wonderful outdoor recreation experiences and unique education opportunities. Fifteen million acres provide for grand diversity and were enjoyed by nearly 740 million visitors to state parks during the past year, an increase of more than 12 million visitors from the preceding year. State park visitation trends continue at record levels. Collectively, state parks now report an inventory of more than 217,000 campsites, of which about one-third are seasonal. Of the nearly 60 million overnight visitors to state parks in the past year, over 50.3 million were campers.

VEHICLE SALES:

According to the Recreation Vehicle Industry Association (RVIA), the market for RVs has remained strong and sales of new units in 2015 will rise to more than 370,000 units. This will mark a sixth consecutive yearly increase.

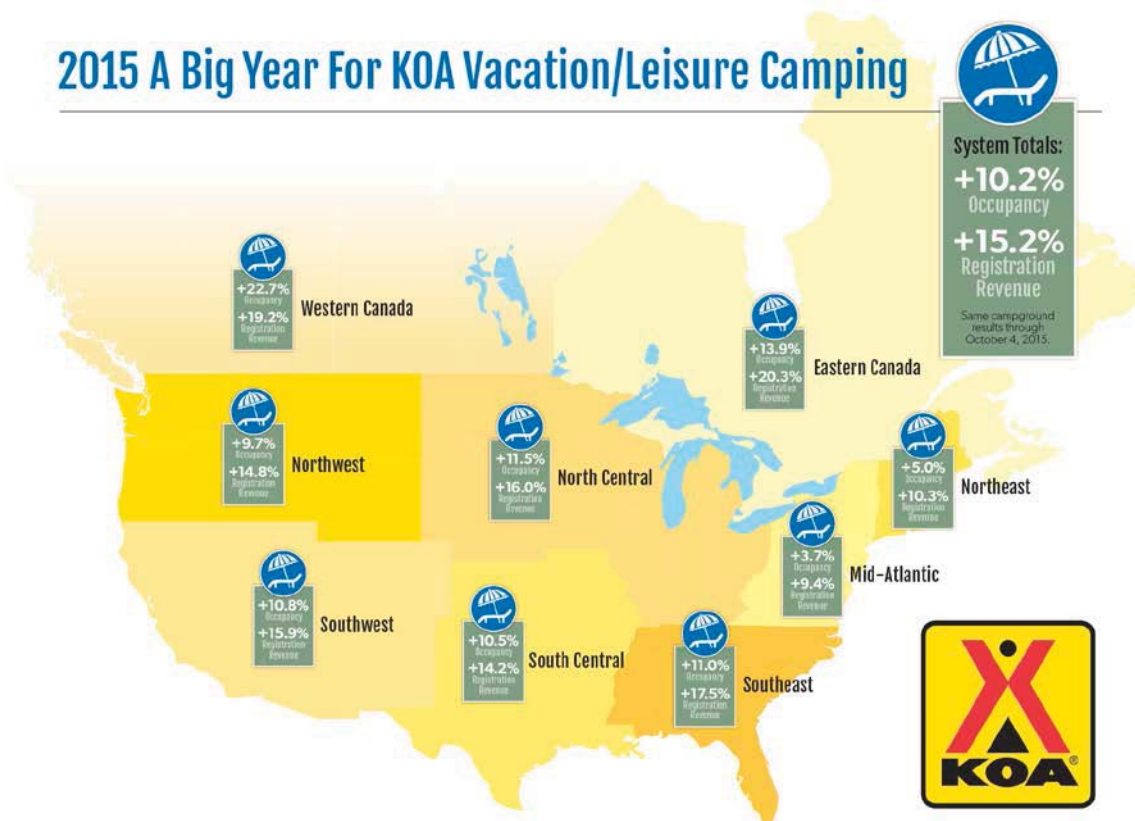
The industry has benefitted from an uptick in the overall economy that, along with growth in light vehicle sales and low fuel prices, should provide a favorable environment for growth in future RV sales as well. Increased interest in using an RV for more than just weekend outings has been widely expressed by potential buyers, making purchase decisions for vehicles with flexible floor plans most attractive. Shipments of travel trailers, both conventional and fifth-wheel trailers, are expected to set an all-time record high this year while motorhome products are expected to reach totals not seen in nearly a decade.

Looking further out, forecasts for 2016 RV sales remain favorable with total shipments expected to surpass this year's estimate to finish at more than 380,000 units.

Recreational use of on- and off-highway motorcycles, ATVs, and ROVs is also growing. The industry contributes nearly \$109 billion in direct spending to the U.S. economy annually and over 1.5 million jobs. Recreational off-highway vehicles (also known as side-by-sides) are becoming increasingly popular and are the fastest growing segment of the powersports market. Nearly 30 million Americans ride motorcycles on and off-roads, and ATV ridership is some 35 million annually.

CAMPING:

KOA – the nation’s largest private campground system – reports a very strong year across the board, with both occupancy and registration revenue showing increases.



ACTIVE Network, the organization that manages recreation.gov – the unified means for making reservations on all federal lands – reports that reservations increased 19% – to 4.4 million in 2015, up from 3.7 million in 2014. Recreation.gov recorded more than 22 million visits, an increase of 31.25%, and a 28.15% increase in users, with nearly 12 million in 2015. Use fees also increased 12% over 2014 levels. Federal reservable facilities increased from 3,079 to 3,205 over the same period.

FISHING:

Fishing remains one of the most popular lures to the great outdoors. According to the 2015 Special Report on Fishing released by the Recreational Boating & Fishing

Foundation (RBFF) and the Outdoor Foundation, the sport continues to grow, with 2.4 million newcomers who tried fishing in 2014 alone. Forty-six million Americans – 15.8% of the U.S. population ages six and older – participated in fishing last year and those numbers are expected to keep growing with RBFF’s new “60 in 60” initiative, which aims to achieve 60 million anglers ages 6 and older by 2021.

Additionally, over 47% of first-time fishing participants are female. Fishing participation as a child has a powerful effect on future participation – 85% of adult anglers fished as a child. Hispanic fishing participants average 25.8 days on the water per year, over six days more than the average for all fishing participants (19.4 days). Hispanic engagement has also increased. At the mid-point of the fiscal year, RBFF had 800,000 visits to Vamos A Pescar, doubling last year’s full year total of 400,000. RBFF expect to hit 1 million by the end of the year.

“We are pleased that 2.4 million newcomers tried fishing for the first time in 2014,” said RBFF President and CEO Frank Peterson. “Fishing remains a popular outdoor activity and with increasing numbers of newcomers, we look to growing overall participation in the future, securing critical support for state conservation efforts.”

Fishing remains one of, if not the most social and spontaneous outdoor activities. Nearly 82% of fishing trips involve more than one person, and 81% of fishing trips are spontaneous or planned within a week of the trip.

RBFF will be renewing its Disney Alliance for an additional five years. A recent survey done with families who engage with Disney Media found that young parents, women and kids ages 9-11 are heavily influenced to participate in fishing and boating as a result of the campaign.

BOATING & MARINAS:

New boat sales continue to steadily recover but still remain below pre-recession highs. With an estimated 6% growth expected in 2015 and another potential 6% growth in 2016, the industry would be poised to return to near pre-recession levels of 250,000 new boats sold, including power, sail and personal watercraft. Ski boats, outboard boats, jet drive boats and personal watercraft are showing the strongest gains in 2015.

While 2015 also saw some gains in the sterndrive boat market, it is still working to recover as much as other segments. National Marine Manufacturers Association (NMMA) President Thom Dammrich, during a presentation at the annual International Boatbuilders’ Exhibition and Conference (IBEX) in the fall of 2015, noted sales will likely reach, or surpass, the industry’s 2006 high in the next couple of years as he anticipates continued growth in recreational boating until at least the middle of 2018. He also noted that innovation is continuing to drive new boat sales with manufacturers developing exciting new product that’s attracting a range of buyers.

Marinas continue to build momentum post-recession with more and more of them forging ahead with capital projects, as indicated by both discussion and a resurgence in applications for the federal Boating Infrastructure Grant (BIG) Program, which now receives far more applications for facilities serving touring boaters than can be funded.

The push to improve comes from the call from boaters for marinas to be resort and destination locations instead of just places to store and repair boats. Boaters want pools, clubhouses, nearby restaurants and activities, as well as clean, comfortable accommodations for weekend visits.

According to an annual survey conducted by the Association of Marina Industries (AMI), 31% of marinas surveyed are now offering boat rentals, 19% are offering water toy rentals, 37% are offering event venues and services, 50% incorporate restaurants into their services, and 19% are offering cabin, campground and RV park services. All of these figures are up from previous years, indicating the trend towards providing added services for customers is continuing.

The only service area that saw a decline was tour and charter boat services, dropping from 23% offering this service to just 15%. More than likely this service is being replaced by the new trend of joint ownership in boating or in boat clubs whereby members pay a fee for use of club boats.

BIKING:

The U.S. bike industry is enjoying another solid, steady year of sales. Total U.S. retail dollars generated by retail sales of bicycles, accessories, and related equipment are expected to exceed \$7 billion this year – a figure that includes sales of used bikes. Unit sales are expected to total about 18 million (counting both kids and adult bikes), which is a figure that matches most years in the last decade (except 2009, when unit sales took a downturn during tough economic times).

According to a study commissioned by PeopleForBikes, 103 million Americans rode a bike at least once in 2014. Bike riding in large U.S. cities has doubled in the last 15 years. Safer bike infrastructure and onset of bike-sharing systems (in at least 70 U.S. cities) are key factors in this growth, a trend that is expected to continue. While the number and percentage of children who bike to school has fallen dramatically during the last 40 years, overall kids riding remains strong. Children now ride more often with parents instead of unsupervised. Also, a large number of new bike parks have been built coast to coast. These parks provide safe and appealing bike riding opportunities for children and adults of all ages and abilities. Many more will be built in the coming years.

Bicycle-related tourism is growing. State governments increasingly recognize that they can attract residents and visitors to appealing bike-riding destinations. States are spending more money on bike tourism promotion, maps, signage, and some are even hiring fulltime liaisons with outdoor recreation businesses.

OUTDOOR ADVENTURE SPORTS:

According to the America Outdoors Association, revenues for whitewater rafting, kayaking and paddlesports are up significantly over 2014, with lower gas prices fueling family travel. Most outdoor recreation activities and cabin rentals saw higher demand. Revenues for aerial adventures (zip lines and aerial adventure parks) have flattened out as the number of parks have proliferated. Growth continues but is being absorbed by

increased capacity at new parks.

SKIING:

U.S. ski areas tallied an estimated 53.6 million skier and snowboarder visits during the 2014-15 season – down 5% from the previous season’s 56.5 million total, and down 3.8% from the five-year industry average of 55.7 million skier visits according to the National Ski Areas Association (NSAA).

Despite a stronger economy, weather challenges across all regions of the country contributed to this drop in skier visits. Nationally, snowfall was 28% below average this season – particularly on the West Coast – and especially frigid temperatures in the Midwest and the East, along with sizeable snow storms in the Northeast, impacted the ability of skiers and snowboarders to even get to many ski areas.

NSAA’s survey results also contained some particularly positive news. For example, the results from the critical Rocky Mountain region were well above the region’s five-year average. Similarly, both the Northeast Region and the Southeast Region also had seasons that surpassed their five-year averages. While the three regions were each just slightly below last season’s skier visits, both the Rocky Mountain region (where Colorado set an all-time record for skier visits last year), and New England (which had a very strong season in 2013-14) performed well despite weather challenges.

NSAA’s survey results also showed strong growth in season pass sales, which were up 6.2% from the previous season—an important indicator in the public’s demand for skiing and snowboarding.

Furthermore, international visits continued to grow, with double-digit growth over the previous season. This was especially encouraging, because this growth occurred against the backdrop of a strong dollar, which often translates into fewer international visits. In 2014-15, international visits accounted for 6% of all skier visits to American ski areas, up from 5.6% last season.

WINTER SPORTS GEAR:

Snow sports market sales topped \$4.5 billion for the 2014-15 season, up 2% compared to the 2013-14 season. Overall, categories including outerwear, snow boots, headwear and more sold very well this season, but equipment and many equipment accessories like goggles and helmet sales dropped compared to 2013-14. Outerwear sales were up 9% to \$1.8 billion. Equipment sales including skis, boards and poles dropped 7% to \$839 million, and accessory sales dropped 3% to \$331 million. Sales of digital cameras continued a sharp upward trend with \$55 million in sales, up 10%.

Much like ski pass sales, weather conditions across the country dictated snow sports market performance and participation, and there were extreme conditions in the various regions this season. Despite the slight decline in participation, the Snow Sports market consumer base has been remarkably stable since 1994. The Snow Sports consumer is young, mostly casual, well educated, medium to high income, more ethnically diverse than perceived and principally resides in urban environments.

SNOWMOBILING:

The International Snowmobile Manufacturers Association (ISMA) is optimistic about the 2015-16 snowmobile season following above-average snow cover throughout much of North America this past winter. Snowmobile sales in the United States and Canada for 2015 increased 6% compared to 2014, and the sales of manufacturer-branded parts, clothing and accessories increased 5% from last year. The number of registered snowmobiles remains at the same historically strong levels as last year. Snowmobilers love cold, snowy weather, and look forward to another great year of snow for their activity of choice.

According to ISMA, manufacturers' snowmobile shows featuring 2016 models are reporting increases in attendance. Each year the manufacturers realize increased visitation at the fall and spring snowmobile shows as the popularity of the shows increases. Snowmobile-related tourism also shows increases in North America. Economic impact studies conducted by major business colleges and universities show miles ridden by snowmobilers increased 9% over last year. This increase is a result of excellent riding conditions and improved and expanded riding areas and trail systems.

There are tens of thousands of miles of public snowmobile trails, maintained by snowmobile clubs across the country using funding from registration fees and gas taxes. With new grooming equipment and techniques available, the trail systems will be enjoyed by hard-core enthusiasts and a growing number of those who rent snowmobiles at winter resorts and destinations in the snowbelt of the US and Canada. The industry is looking forward to a great year in 2016.

SUMMARY:

Recreational activities continue to be a mainstay of the American lifestyle. Most components of the recreation industry reported significant gains in 2015 and the general outlook for the outdoor recreation industry in 2016 is optimistic. Our conclusion in the comparable forecast last year was that recreation activities will increase as more people seek active, healthy, "high value" vacationing. Then, and even more now, we see America's great outdoors as a perfect fit for this desire.

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