

NORTHEAST'S RECREATION TRENDS AND MARKETS — A NEW DATA SOURCE

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Abstract

The purpose of this paper was to examine recreation trends and markets in the Northeast over the period of 1993 through 2002 through the current NSGA data set. Activities examined were assigned into four major groups and included community based; resource-based; water-based and winter-based activities. The data set analyzed included data from the National Sporting Goods Association and the National Family Opinion, Inc. Trend patterns were presented and activities were examined to determine if patterns in the selected activities occurred. Fifteen (15) of 34 activities increased by overall market size in the Northeast. Resource-based activities and, in particular, trail-based activities (hiking, backpacking, off- and on-road mountain biking) revealed strong growth trend patterns in market size. The activity with the overall highest average annual increase in market size in the Northeast was participation in paint ball games followed closely by snowboarding.

1.0 Introduction

A number of different types of activity trends have occurred in recent years within an ever-widening area of recreation and sport pursuits. Some trends have been gradual in nature while others have been much more dramatic. The examination of trends over time is a fundamental necessity to determine if investments in the future are needed and whether appropriate planning needs to occur. Kelly and Warnick (1999) indicated that there were few consistent studies of a broad spectrum of recreation activities until their work in 1999 was completed. In recent years, the compilation of the National Sporting Goods Association (NSGA) data (2004) and the United States Forest Service's (USFS) National Survey on Recreation and the Environment (2004) data have provided new insights into the changes of a variety of activities. However, it is critical in these studies to both continue the monitoring of specific activities and to examine if these national trends are reflected in regional and local areas. Likewise, it is important to monitor the data consistently to determine

if the changes in trends are gradual, dramatic, sustained or even masked within inter-regional locales. Shifts and interests in recreational activities are indeed likely to occur. Some of the shifts in activity patterns will also be reflected in how our populations in various regional areas change and evolve in the coming decades. With certain regions aging faster demographically (i.e., the Northeast) and other regions (i.e., the South and Southwest) down-aging with the influx of younger adults, young families and young immigrants, significant difference could occur within respective regional recreational interests and pursuits. Other changes may also be the result of activity promotion, marketing and improvements in technology. Many will react to these shifts by devising marketing strategies to grow various activities or will react to the changing demographic profiles of their respective areas by concentrating on selected profitable markets. However, these differences and changes, both gradual and dramatic, will clearly provide some evidence of future demand for the agencies supplying the management of resources for these recreational pursuits.

Recent studies (Warnick 2000, 1998, 1997a, 1997b, and Warnick and Kelly 2000) indicated activity trends in the Northeast and New England had become both mature and evolving as new activities replaced older common placed pursuits. Some activities such as biking for example have become more segmented and specialized. It is no longer "biking", but has become specialized with tour biking, on-road mountain biking, off-road biking and other hybrids. Other studies (Warnick 2002) have examined how New England's travel markets were also highly linked to active recreational pursuits. For many of the Northeast and New England attractions, the careful monitoring of trends in activities and markets is critical to these tourism-based economies. One must know what is and has happened and what will likely happen in the future.

2.0 Purpose of Study

The purpose of this study is to: 1) to first examine, suggest and assign typical trend patterns; 2) to identify national trends patterns in popular recreation pursuits and; 3) to examine the recreation trends of selected recreational activities in the Northeast over the time period of 1993 through 2002.

3.0 Method

In previous studies (Kelly and Warnick 1999; Warnick 1998), two databases were examined to understand the recreation trends in the Northeast and New England. These data sets included Simmons Market Research Bureau's Study of Media and Markets and Standard Rate and Data Service's (SRDS) Lifestyle Market Analyst. However, in this study, a new data set was explored which contained ten years of trend data from 1993 through 2002. The data came from the NSGA's sport business research network (www.sgrnet.com, 2004) and it was supplied to NSGA through the National Family Opinion (NFO) Research Group via this consumer research panel. The NFO's Consumer Panel Research Study is an annual survey of 20,000 households and is balanced and weighted to actual household regional distribution. The response rates exceed 70% and confidence intervals exceed 95%. The National Sporting Goods Association contracts from NFO to complete their annual study of sports and recreational activities. The data are compiled and made available to contracting universities for teaching and research purposes. The data are presented in tabular form, but there is no trend analysis. There is only a compilation of year participation totals of the market size and corresponding information the demographics and regional distribution of the markets.

There are a number of advantages to the use of the data set. They include: 1) the most recent data available – 2002 data for example; 2) a broad set of recreational activities; 3) the inclusion of children and youth activities as well as adults ranging in age from 7 years and up; and 4) the provision of data on both frequent (committed) participants, casual participants (these participants must be extrapolated) and regional profile participation. However, it suffers from some of the same limitations of the early Simmons data. The information is available only in tabular form; it must be compiled accordingly, and it does not permit the re-analysis of the information on a selective basis. The data are not available at the web site on a case-by-case basis nor is the data available in any digital format for additional statistical analysis. However, it is very current and this study does provide a fresh current look at data that can be trend analyzed and compared to the preliminary and on-going work of NSRE to be released in 2005. For the purposes of this study, a number of statistic variables were used to describe the trends in these data.

The descriptive statistics used included an average annual adjusted percent change rate in the NSGA data. The average annual adjusted percent change rate examines the change from each year to the next (1994 to 1993, 1995 to 1994 and so on through 2002 to 2001) and averages the year-to-year changes over the entire period. Participation is measured by the number of participants (in millions) who participated in the activity in the previous 12-month period. A sub-segment of participants called "frequent participants" were also examined at the national level. NSGA (2004) sets a frequency limit for each activity and it varies by activity. For example, a frequent exercise walker is one who walks 110 or more per year where a frequent downhill skier is one who skis twenty (20) times or more per year. These national findings were discussed in the general trend analysis; but, the focus was the change in the activity markets and assignment of trend patterns of the Northeast markets. The Northeast is defined as states north of Maryland including the six (6) New England states (Maine, New Hampshire, Vermont, Massachusetts, Rhode Island and Connecticut) plus New York, Pennsylvania and New Jersey. The 34 selected recreational activities were grouped into sets of activities based on the classification and configuration of activities by Kelly and Warnick (1999) and NSRE (2004). These included 10 community-based activities, eight resource-based activities, nine water-based activities and seven winter-based activities. The community-based activities included: biking, bowling, exercise walking, golf, inline skating, paint ball games, running/jogging, skateboarding, tennis, and fitness club use. Resource-based activities included: backpacking, hiking, camping, hunting, off-road biking, on –road biking, target shooting, and archery. Water based activities included canoeing, kayak-rafting, freshwater fishing, sailing, power boating, snorkeling, swimming, water-skiing and windsurfing. Winter-based activities include cross-country skiing, ice skating, ice hockey, downhill skiing, snowboarding, snowmobiling, and snow shoeing.

To compare both national and regional trends, 10 patterns were reviewed, explored and assigned to each activity. These activity trend patterns included:

- Mass appeal – activities that typically maintain a wide and broad appeal of participation for a broad segment of the population – participation

rates are usually in the 40-50% range of the population participating

- Growth trend – participation numbers are steadily increasing and they are increasing at a rate faster than the population growth rate; growth rate has been sustained for at least three consecutive years
- Decline trend – participation numbers reveal a steady pattern of decline for three or more years in a row, occasionally a one year change in the pattern may occur; however, the overall trend pattern from the beginning of the trend period to the end is one of overall decline
- Growth with new participant base – this is a growth activity with a large influx of new or infrequent participants who are now trying the activities and the activity may now retain a significant new core of participants
- Growth to a stable level – the activity has a burst of activity growth over three years, but then settles into a stable or relatively flat pattern with little or no change over an extended time period of two or more years;
- Fad activity – rapid increase in number of participants followed by at least two years of rapid decline in interest
- Fluctuating trend pattern – no clear pattern of growth or decline, the number of participants varies substantially from year-to-year with no set pattern of spikes or growth or decline phases
- Peaking or spiking activity – an activity with has periodic spikes in activity interest over a sustained period of interest, spikes may be brought on by media or event attention (i.e., The Olympics)
- Growth to stable to uncertain trend future – this is an activity that has grown, peaked, and appears to have some stability but then also after one or two years drops off in activity interest
- Recycle or rebound – an activity which has grown, dropped off in popularity and has rebounded to recycled back to a new growth trend that is sustained over a two-year period
- No growth – stable activity – this is an activity with very little change in the number of participants or participation rates as it remains relatively stable over an extended period of time

perhaps as little as three to five years but may extended into a longer stable period

- Niche activity – a small participation base of followers traditionally below three percent of all adults or under two (2) million in participants.

Some activities could be a combination of trends – such as a niche, growth activity. The sub-segment of “frequent participants” for each activity was also examined to determine if any trends were masked or revealed patterns internal to the overall market demand within the activity on a national basis. These trend patterns were recommended by Warnick and Kelly (2000).

4.0 Selected Findings

4.1 National Trends in Activity Participation

When individual activities were examined the five most popular activities in 2002 for the general population that covers all adults from age 7 years through adulthood were:

- 1) exercise walking (82.2 million participants, up from 71.2 million in 2001)
- 2) overnight camping – 55.4 million, up from 45.5 million in 2001
- 3) swimming – 54.7 million that has held steady since the early 2000
- 4) exercising with equipment – 43 million participants
- 5) bowling – 43.9 million participants – up from 40 million in 2001

The five fastest growing activities were:

- 1) wall climbing (artificial walls) – 41.9% growth in the number of participants
- 2) kick boxing – 21% growth
- 3) snowboarding – 14.9% growth
- 4) weightlifting – 9.3% growth
- 5) kayaking/rafting – 9% growth

In terms of frequency of participation and the frequent market segment, the five fastest growth segment activities were:

- 1) target shooting (20+ days per year) – up 20.7%
- 2) kayaking/rafting (10+ days per year) – up 19.5%
- 3) snowboarding (30+ days per year) – up 17.6% per year

Table 1.—Community-Based Recreation Activity Trends in the Northeast, 1993-2002

Activity	1993	1997	2002	Change Rate	Trend Type
Bicycling	10.3	8.9	8.1	-2.0%	Decline
Bowling	9.3	8.7	8.3	-0.6%	No Growth/Slight Decline
Ex. Walking	13.2	15.0	16.0	2.8%	Growth/Mass Appeal
Golf	4.3	5.3	5.3	2.9%	Growth
Inline Skating	2.4	5.3	3.2	5.6%	Growth Peak - Decline
Paint Games	n/a	n/a	1.4	17.5%	Growth (Fad)
Running/Jog	3.5	4.0	4.7	0.0%	Mature -Stable
Skateboarding	1.1	1.2	1.8	8.0%	Growth Niche
Tennis	3.4	2.1	2.5	0.0%	No Growth - Decline
Fitness Club	4.0	4.0	5.6	4.7%	Growth

Participation is listed in millions of participants in 1993, 1997 and 2002.

Note: Due to space limitations, only 1993 - 1997 - 2002 years shown in trend sequence.

Change rate is an average annual change rate based on number of participants. Northeast includes Mid-Atlantic Region and New England Region.

- 4) skateboarding (30+ days per year) – up 16.0% per year
- 5) work out at club (110+ days per year) – up 14.1% per year

The five biggest losers in terms of decline in activity participation were:

- 1) traditional roller skating – down 7.6% in participants
- 2) step aerobics – down 6.8% in participants
- 3) volleyball – down 5.8% in participants
- 4) cross country skiing – down 5.2% in participants
- 5) racquetball – down 4.4% in participants

Some overall activity patterns can actually be masked by internal market trends. For example, downhill skiing has declined by a negative 3.4% per year (average annual change rate) from 1993 to 2002. But, the number of frequent downhill skiers, those who ski 20 or more times per year, has increased by an average annual change rate of 4.9% per year. Furthermore, the composition of frequent downhill skiers has grown from 9.5% of all skiers in 1993 to 16.2% of all skiers in 2002. This suggests both a decline in the number of causal skiers and a reconfiguration of the internal market dynamics of the downhill ski market. Further internal analysis of the downhill ski market revealed that the 18 to 34 age demographic is where a major portion of the decline has occurred. Just as internal market trends of an activity can

be masked, the dynamics of regional differences can also exist.

Within the Northeast Region, it was found that even though the number of downhill skiers had declined, the number of skiers in the New England region of the Northeast actually increased. The average annual growth rate in the New England downhill ski market revealed an average annual growth rate of 1.4%. This rate was higher than the growth of the general population.

4.2 Northeast Community-Based Activities.

Ten different activities were examined in the group of community-based activities. Only two activities declined in the Northeast – tennis and bicycling. One activity experienced no growth/ slight decline -- bowling and one activity experienced classic maturing followed by a decline phase (inline skating). All of the other seven activities either grew or rebounded during the period. Fitness club participation/use, golf and participation in paint ball games each experienced a substantial growth in the 10-year period. Exercise walking was found to be the region's most popular activity and had actually rebounded after a decline in 2001. One activity trend in the region that ran counted to the national trend was bowling. There was no growth in popularity in the Northeast whereas nationally the activity was one of the five most popular activities in terms of overall growth in participation. The community-based activity trend patterns and data are presented in Table 1.

Table 2.—Resource-Based Recreation Activity Trends in the Northeast, 1993-2002.

Activity	1993	1997	2002	Change Rate	Trend Type
Archery	n/a	1.7	.9	1.0%	Growth/Spiking
Backpacking	1.6	2.0	2.9	9.3%	Growth
Hiking	3.6	5.6	5.3	5.7%	Growth
Camping	7.0	7.3	9.9	0.0%	Stable/Rebound
Hunting	3.4	2.7	2.7	-1.2%	Decline/Spiking
Off-Road Biking	1.0	1.7	1.8	8.8%	Growth Niche
On-Road Biking	1.8	3.2	2.6	7.6%	Growth
Target Shooting	2.2	2.4	2.8	0.0%	Stable Niche

Participation is listed in millions for 1993, 1997 and 2002.

Note: Due to space limitations, only 1993 - 1997 - 2002 years shown in trend sequence.

Change rate is an average annual change rate based on number of participants. Northeast includes Mid-Atlantic Region and New England Region.

4.3 Northeast Resource-Based Activities.

Eight different activities were examined in the group of resource-based activities. Five (backpacking, hiking, off- and on-road mountain biking and archery) of the activities experienced growth in market size in the Northeast. Only one activity declined – hunting. Another activity, archery, grew at a rate of 1.6% per year, but its pattern revealed a spiking pattern. The spiking pattern lagged behind the national pattern for the activity and the activity interest in the Northeast spiked in the years after the Olympics – 1997 and 2001. There was also a contrast with the national trend in this activity as the national rate of interest in archery indicated an average annual decline of 1.6% per year in contrast to the average annual increase in the Northeast of 1.1% per year in overall market size. Two activities were statistically stable but the trend pattern actually indicated some increased interest – camping and target shooting. Overnight camping was the most popular of these activities in the Northeast with nearly 10 million participants by 2002.

Off-road mountain biking, although largely a niche market activity, experienced rather dramatic growth (8.8% average annual growth rate). This rate of growth was higher than the national average annual growth rate of 7.2% per year. This activity nearly doubled in market size from 1993 through 2002 – increasing from 1 million participants to 1.8 million participants in the Northeast. Although figures are not available by frequent off-road mountain bikers in the Northeast, the growth nationally in this segment is substantial and the trend is likely

to be also pronounced in the Northeast had the trend data been made available through NSGA and NFO. Nationally, the growth in the frequent off-road mountain bikers indicated that the number has grown by an average annual rate of nearly 46% per year. In 1993, there were estimated to be about 300,000 frequent off-road mountain bikers, those who biked more than 30 days per year. By 2002, there were an estimated 2.4 million frequent, off-road mountain bikers. In 1993, 7% of all off-road mountain bikers were frequent participants, by 2002 the composition of frequent off-road mountain bikers had increased to 33% of all off-road mountain bikers.

One activity—hunting—experienced a decline, but its decline was not steady but one following a spike pattern. In 1993, there were 3.4 million hunters in the Northeast and by 2002, the number had declined to 2.7 million. This constitutes a decline of about 2% per year although there were spike patterns in this activity in the Northeast. This contrasted to a national trend where hunting actually grew in overall market size by 1.0% per year and the number of frequent hunters grew by an average annual rate of 5.3% per year. The spike years in the Northeast were 1993, 1996 and 2001 with declines in the number of hunters in the years following each of these spike years. It is not clear if there were any reasons to cause spike increases in these years of the declines thereafter in the Northeast. However, it is clear that the decline has indeed fluctuated and not been one of steady decline.

Table 3.—Water-Based Recreation Activity Trends in the Northeast, 1993-2002.

Activity	1993	1997	2001 or 2002	Change Rate	Trend Type
Canoeing	2.3	2.1	1.9	-0.8%	Fluctuating/Decline
Kayak-Rafting*	0.4	0.5	1.2	15.5%	Growth (Niche)
Freshwater Fish	6.8	5.5	5.4	-2.2%	Decline
Sailing*	1.1	0.9	0.6	-7.0%	Decline (Niche)
Power Boating*	3.6	4.1	4.0	2.1%	Growth
Snorkeling*	1.1	1.2	1.3	3.8%	Growth (Niche)
Swimming	14.6	12.1	12.0	-2.0%	Decline (Mass)
Water Skiing	1.3	0.9	0.8	-3.2%	Decline (Niche)
Wind Surfing*	0.1	0.1	0.1	5.1%	Growth (Niche)

Participation is listed in millions for 1993, 1997 and 2001/2002.

Note: Due to space limitations, only 1993 - 1997 - 2001/2002 years shown in trend sequence.

Change rate is an average annual change rate based on number of participants. Northeast includes Mid-Atlantic Region and New England Region.

*For kayak-rafting, sailing, power boating, snorkeling and wind surfing; trend data were available only through 2001.

Backpacking, hiking and on-road biking all experienced steady growth in the number of participants during this period, too. All trail related activities experienced strong growth in market size and each of these activities grew at rates equal to or excess of the national growth rates for the activity. The growth rate in market size in the Northeast for backpacking was 9.3% (average annual rate) compared to the national rate of 6.2% (average annual rate). The growth rate in market size for hiking in the Northeast was 5.7% (average annual rate) – the same as the national rate. The growth rate in market size for on-road mountain biking in the Northeast was 7.6% (average annual rate) compared to the national rate of 5.3% (average annual rate). The growth rate for off-road mountain biking, mentioned earlier in the Northeast was 8.8% (average annual rate) compared to the national rate of 7.2% (average annual rate). The resource-based activity trend patterns and data are presented in Table 2.

4.4 Northeast Water-Based Activities

Nine different activities were examined in the group of water-based activities. Three of the niche activities (those activities that have relatively small markets of less than two million participants) experienced growth in the overall size of the markets – kayak-rafting, snorkeling, and windsurfing in the Northeast Region. Two large market size activities, swimming and freshwater fishing, declined in market size overall in the Northeast. Two niche market activities, water skiing and sailing, also declined in overall market size. The only other activity to grow during the period was power boating. Demand

for canoeing fluctuated substantially over the period and declined overall in average annual change rate. Swimming remains the most popular of all water-based activities with 12 million regular participants in the Northeast in 2002, but this number has declined from a peak of 14.6 million swimmers in 1993. The water-based activity trend patterns and data are presented in Table 3.

4.5 Northeast Winter-Based Activities

Seven different activities were examined in the group of winter-based activities. Two of the activities experienced strong growth during the 1993-2001/2002 period – snowboarding and snowmobiling. Snowboarding grew by 17.1% per year and increased from .4 million participants in 1993 to 1.7 million participants in 2002. The time period for snowmobiling was shorter, 1995 through 2001, but the number of riders has increase in the Northeast from 1.5 million to 2 million. The rate of growth in the Northeast was faster than the national growth rate for snowmobiling of 8.8% (average annual rate change). Four of the remaining activities experienced decline in the overall numbers of participants, including cross-country skiing (decline of 4.4% per year), ice skating (decline of 3.3% per year), ice hockey (decline 1.8% per year) and downhill skiing (decline of 1.9% per year). While the ice skating market has declined in size in the Northeast, still nearly a third of all ice skaters are from the Northeast.

While the market of people who play ice hockey has also declined in the Northeast, it is still a substantial

Table 4.—Winter-Based Recreation Activity Trends in the Northeast, 1993-2002.

Activity	1993	1997	2001/2002	Change Rate	Trend Type
Cross Country Skiing	1.3	0.7	0.8	-4.4%	Decline
Ice Skating	2.6	2.7	1.8*	-3.3%	Decline
Ice Hockey	0.8	0.7	0.6	-1.8%	Decline (Niche)
Downhill Skiing	3.3	2.4	2.4	-1.9%	Decline
Snowboarding	0.4	0.8	1.7	17.1%	Growth
Snowmobiling	n/a	1.5	2.0*	9.2%	Growth
Snow shoeing	n/a	0.2	0.4	---	Inconsistent trends

Participation is listed in millions for 1993, 1997 and 2001/2002.

Note: Due to space limitations, only 1993 - 1997 - 2001/2002 years shown in trend sequence.

Change rate is an average annual change rate based on number of participants. Northeast includes

Mid-Atlantic Region and New England Region.

*Snowmobiling includes data only from 1997 through 2001.

*Ice skating includes data only from 1993 through 2001.

market. The market for ice hockey has actually grown nationally at an average annual rate of 3.3% per year. In fact, all regions outside of the Northeast have grown at a rate faster than the Northeast. Growth has been especially strong in the Eastern South Central, Mountain and Pacific Regions for ice hockey participation. While overall participation is up nationally, the real growth in the activity is in the number of frequent ice hockey participants (those who play ice hockey 30 or more times per year). The growth of frequent ice hockey players is up 16% per year (average annual change rate) and now nearly 50% of all ice hockey players are frequent participants.

Evidence also suggests that a portion of those people who were once downhill skiers may have convert to snowboarding. However, more likely it is the pattern that youth who learned to snowboard in the late 80s and 90s and who are now in the 18- to 34-year-old demographic is where the largest increase in snowboarders occurs. In contrast, the only age segments where downhill skiing decreased were from the same demographic – the 18- to 34-year-olds.

There was not enough data to document sustained trend changes for snow shoeing. Although the evidence suggests some increase in the activity in the Northeast, there was only 4 years of data collected and the most recent information was collected in 2000. The winter-based activity trend patterns and data are presented in Table 4.

5.0 Conclusions and Implications

In general, recreation activity markets in the Northeast have rebounded from previous study findings of stability or limited numbers of growing activities. Of 34 activities examined, 15 activities were found to have exhibited real growth patterns in overall market sizes during the period of 1993 through 2002. Especially strong growth was revealed in trail-based activities such as backpacking, hiking, mountain biking, and snowboarding. One other new activity, playing paint ball games, also demonstrated the strongest sustained growth trend patterns even though data were only available for the period 1999 to 2002.

There was evidence that not all activity trend patterns reflected the national trend patterns. An example would be the community-based activity of bowling where growth in popularity was noted at the national level but not reflected in growth in the market size in the Northeast. Downhill skiing also reflected different trends regionally than nationally. For downhill skiing the overall market size declined; but, the internally the frequent market segment grew in both real numbers and in the overall composition of all skiers. On a regional analysis, the Northeast market of downhill skiers indicated an overall decline, too; however, the number of skiers in the sub-region of New England actually grew from its lowest numbers in 1999 to near its highest number in 2002. The rate of overall growth (average annual rate of increase of 1.4%) of downhill skiers in New England actually grew at a rate faster than the growth of the general population.

These findings also continued to support the revealed changes in activity segmentation. For example, biking as an activity has continued to become more specialized with the continued growth of off- and on-road mountain biking and the decline in the general biking category. As a group, the resource-based activities grew overall the most with more people participating in outdoor-based recreational pursuits. This supports trends similar to the trends found in the NSRE (2004).

In one particular case, snowboarding may have displaced downhill skiing as some participants have converted from downhill skiing to snowboarding. Other winter-based activities found general declines in the overall market size – including cross country skiing, ice skating and even ice hockey. Snow shoeing remains a small niche activity and the size of the market is simply too small to predict any trends or patterns in the activity with any level of certainty. The fitness movement does appear to be gaining strength both nationally and in the Northeast. Two strong indicators, working out at a club and exercise/fitness walking, each increased substantially during the 1993 to 2002 period.

Activity choice trends also appear to continue to emerge. The overall number of choice patterns among participants and activity maturation/saturation stages of selected activities continues to be supported. With more choices, the maturation of general mass appeal activities has occurred and the increases in activity specialization has appeared in both how the data are collected and recorded. Activities, such as swimming and biking (mass appeal activities) for example, are not and will not experience large increases in market growth now or in the future. Rather, these activities will likely become more segmented and specialized. While this trend was observed in biking in earlier studies and was again confirmed in this study, another example that appears to be evolving is swimming. The way one chooses to get wet has evolved as well as the opportunities and venues for one to do so. One may go to a water park, get wet but never really swim. The overall interest in water activity is there, but it is a much different set of activities and many different choices in water activity venues confront the consumer. It is likely that national data sets will begin to offer additional activity choices, much as they have with biking, for the “water activity” category. Swimming was a mature activity in this study and its lack of growth may actually be a result of how people perceive the “water

activity” category. Going to a water park may be a water activity occurrence, but no swimming has occurred nor does one record, classify or perceive the activity as “swimming.” From the management perspective of the operation of state park swimming areas or municipal pools, participation in general swimming is more likely to decline than grow.

Resource management issues for the management of wildlife in such activities as hunting and fishing may continue appear to be problematic in the Northeast. Hunting and freshwater fishing markets continued to decline in the Northeast based on these research findings. With some wildlife herds -- deer, turkey and even bears in the Northeast, the ability to manage these animals through increasing number of hunters will likely not occur and herd or wildlife management will become increasingly a challenge. On a positive note for those freshwater fishing areas that have been over-fished in the past, the decrease in the size of the freshwater fishing market may actually help the fish stock to rebound. However, it is also likely that the unwanted interaction and nuisance encounters between humans and wildlife in fringe suburban and rural areas that has been found to occur in the Northeast will likely continue to increase with a declining overall market of hunting participants and increasingly larger wildlife herd sizes. For those who do hunt, increased bag limits and increased length of seasons will likely continue to occur in order to offset the declining hunting market and to assist in the management of various types of wildlife. Managed hunts are also likely options to be observe in areas with the continued pressure of the rapid growth in wildlife herds.

An emerging trend that is beginning to appear is the presence of more individualized or personal recreational pursuits. Snowboarding, skateboarding and even paint ball games are examples of new evolving, but individualized markets. Participation in paint ball games is an especially noteworthy example. Just in the past few years has these data become available and been monitored. During the brief four years of data analysis for paint ball games, the market growth was sustained and the largest of any activity monitored here. Another big activity missing in this analysis was the participation in computer and video games. While these activities create various types of reality, the “reality activity-programming trend” will likely continue to grow. These trends need special attention as they may usurp large

amounts of free time among youth and young adults who have set their activity patterns in the formative years and may actually withdraw from other vigorous recreational pursuits. Furthermore, it is likely that games and activities created in virtual reality frameworks, such as in computer games, may actually evolve into simulated active reality games like participation in paint ball games. The “reality activity programming trends” need particularly close monitoring in the future.

In conclusion, the careful monitoring of trends over time and in a consistent format does reveal changes in consumer preferences and activity patterns. New trend pattern emerge and implications for management can be identified. Furthermore, activity patterns and changes in today’s market will impact future trends in the coming decades.

6.0 Citations

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