

APPL Strategic Planning Process Categories of Driving Forces for Data Gathering

The following is a list of driving forces in the external environment grouped into categories. It was compiled from Websites, reports, and surveys of APPL members and agency partners to provide information about where and how these forces are moving. It includes information on *trends and patterns, ideas about possible shifts in trends or patterns, and forecasts of what might happen (possible futures)*.

Specific data is cited where relevant to make the trends as concrete as possible. Some data on trends and patterns might seem contradictory, but are included to indicate the full range of ideas about what might be. In compiling these trends, patterns, and events there has been no attempt to weight what they might mean for APPL.

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Politics

What do we know about trends, possible changes in trends, and possible futures for:

- Political attitudes and values
- Function of government
- Overall government size and structure (state and federal)
- Federal and state budget priorities and government spending (state and federal)

The two major political parties in the U.S. are virtually evenly divided in strength and voters are more polarized along partisan lines. 45.5 % of Americans identify themselves as either Republican or as independents who lean Republican, while 45.2 % call themselves Democrats or independents who lean toward Democrats, according to a 2003 Gallop Survey. There are 7,382 state Senators and

Representatives in the United States. As of December 2003, 3,688 or 49.95% were Republicans, and 3,627 or 49.13 % were Democrats. (The Cook Political Report)

The political pendulum swings back and forth given the administration, and trends follow. (APPL 2004 agency survey)

Voter turnout in midterm elections has hovered around one-third of eligible voters, while nearly half of eligible voters cast ballots in the presidential election. (This Nation)

The party of the winning presidential candidate generally enjoys a net gain of congressional seats during presidential election years, then, most or all of those gains are lost in subsequent midterm elections with the electorate correcting for this overreaction. (This Nation)

There is an increased polarization of America along party lines. (APPL 2004 agency and member surveys)

New and significant forces are viewing recreation as a means to achieve important public policy objectives – including federal health interests under the Centers for Disease Control and Prevention, federal tourism and economic development agencies, and anti-crime agencies. (Roper 2004)

Political climate affects agency funding dramatically. For example, the war on terrorism, with increased national focus on security, results in reduced funding for lands agencies. (APPL 2004 agency survey)

A more pro-business approach within the administration may override longstanding protective environmental laws and regulations. (APPL 2004 agency survey)

Agencies and organizations will increasingly need to work with locally elected officials to inform decision-making. (APPL 2004 agency survey)

There is increased movement toward privatization and outsourcing of functions currently managed by government agencies/agency personnel. (APPL 2004 agency survey)

Members of Congress push forward legislation that will benefit their state/district; not necessarily what may be most beneficial to all Americans. (APPL 2004 member survey)

Economy

What do we know about trends, possible changes in trends, and possible futures for: State and local economies

- National and international economies
- Consumer spending in general
- Spending on recreation
- Spending on books, publications and educational materials

Productivity rates in the U.S. workplace are the highest in the world. People work more hours, with less discretionary time overall. However, work is more flexible, and people can combine vacation and work. (Trends in Demographics and Information Technology Affecting Visitor Center Use, NPS, 2003)

Persons with higher levels of income and education have higher levels of participation in outdoor recreation. (Roper 2004)

Leisure spending is up to 8.3% of total personal spending, from 4.3% over the past 20 years. (E. Sheffield, California State University, Chico)

Most visitors to federal recreation sites are willing to pay more in fees than they were charged. (Roper 2004)

Sportspersons spent a total of \$70 billion in 2001 -- \$35.6 billion on fishing, \$20 billion on hunting, and \$13.8 billion on items used for both hunting and fishing. (USFWS)

Observing, feeding, and photographing wildlife in the U.S. is an important pastime for millions of Americans and contributes significantly to national and state economies. In 2001, more than 66 million people 16 years of age and older spent over \$38 billion on trips and equipment in pursuit of these activities. (USFWS 2001 National & State Impacts on Wildlife Watching)

One in ten Americans visits a Corps of Engineers lake each year. These visitors spend \$15 billion annually. Corps lakes support over 500,000 jobs. (USACE)

A growing national deficit, a flat economy, and stagnant or declining resources make it difficult to address national and world needs such as health care, social security, war and recovery, security, environment, etc. Budgets for “non-essential” public services such as recreational uses of public lands are declining. (APPL 2004 agency survey)

In economically depressed areas where communities are losing manufacturing jobs, people see public lands and tourism as economic opportunities. Unfortunately in the rush to capitalize on the opportunity, concern for the environment (the underlying natural resource base) is often viewed as barrier to economic growth and not an important part of a sustainable future. (APPL 2004 agency survey)

Federal agencies are now and will continue to see budget declines. (APPL 2004 agency survey)

Employment growth will be concentrated in the service-providing sector of the economy. Education and health services and professional and business services represent the industry divisions with the strongest projected employment growth: projected to grow twice as fast as the overall economy. Information, leisure and hospitality, and transportation and warehousing are other service providing industries that are projected to grow faster than average. (Bureau of Labor Statistics)

Nine of the 10 fastest growing occupations are health or computer (information technology) occupations. (Bureau of Labor Statistics)

Continued rising health insurance costs. (Association Management & Marketing Resources)

The number of women in the labor force is projected to grow by 14.%, faster than the 10% growth projected for men. As a result, women's share of the labor force is expected to increase from 46% in 2002 to 47.5% by 2012. In contrast, men's share is projected to decline from 53.5% to 52.5% over the same decade. (Bureau of Labor Statistics)

A globalized economy will be a net contributor to increased political stability in the world in 2015. (National Intelligence Council)

Regions, countries, and groups feeling left behind will face deepening economic stagnation, political instability, and cultural alienation. They will foster political, ethnic, ideological, and religious extremism, along with the violence that often accompanies it. (National Intelligence Council)

Directly and indirectly, the travel industry is responsible for one in eight civilian jobs in the United States. (U.S. Chamber of Commerce)

Culture and Society

What do we know about trends, possible changes in trends, and possible futures for:

- Social structure in the US
- Lifestyle choices
- Culture
- Generational characteristics, public attitudes toward public lands, health and recreation, education, government, and any other areas that might impact the direction and success of APPL members and related organizations

De-Hubbing, or moving away from big cities to rural areas in an attempt to form a better life balance, de-stress, or reduce odds of falling victim to terrorism. (Hospitality Net)

People will continue to have concerns about the nation's security and economy. (Sherry Chiger, retailtrafficmag.com)

Even if Americans aren't interested in going to foreign places, they are interested in bringing the culture home to them, hence the popularity of Asian-influenced design and ethnic cuisine. (Marian Salzman, chief strategy officer of Euro RSCG Worldwide)

Empty nesters in the 55 to 64 year age bracket will be the fastest-growing segment of the home-buying market until 2010. Today people over 55 years of age are three times more likely than 25-34 year-olds to consider a townhouse in the city to be the most desirable living situation. Factors include location to shopping, walking to conveniences, and public transportation as very important. (Congress for the New Urbanism)

Changes in birth rates, delayed marriage and increased divorce have all contributed to smaller households. Between 1970 and 2000, the share of households with five or more people dropped from 21 percent to 10 percent of all households, while those with only one or two members grew from 46 percent to 59 percent. In 2000, the average number of people per household was 2.6, compared with 3.1 in 1970. (U.S. Census)

Changing family types, including a decline in married-couple families with children - from 40 percent of all households in 1970 to 24 percent in 2000. At the same time, the share of households composed of married couples without children remains relatively stable at about 30 percent. The percentage of family households with no spouse present is growing significantly, rising from 11 percent to 16 percent, and the percentage of households composed of people living alone swelled from 17 percent in 1970 to 26 percent in 2000. (U.S. Census)

In 1970, the median age for first marriage was 21 for women and 23 for men. By 2000, the median had risen to 25 for women and 27 for men. However, the majority of men and women do marry eventually. In 2000 about 74 percent of men and women aged 35, had been married and by age 65, 95 percent had been. (U.S. Census)

Most people commuting to work did not take public transportation in 2000. About 75 percent of workers aged 16 and over drove a car, truck, or van, alone to work. Another 12 percent carpooled. Just fewer than 5 percent took public transportation, and an even smaller number, about 3 percent, walked to work. (U.S. Census)

People who volunteer as youth are twice more likely to volunteer and contribute as adults. (Independent Sector)

Sedentary lifestyles contribute to poor health; and people are out of touch with the natural world. (APPL 2004 agency survey)

There is increasing awareness of importance of recreation and exercise to maintain health. (APPL 2004 member survey)

As population continues to increase and urban density increases, public lands will become increasingly critical to those urban populations as both places of recreation and as harbors for retreat. (APPL 2004 member survey)

There is increased competition for leisure time, which impacts interest, attendance, and support for various programs and events. (APPL 2004 member survey)

“Retiring” often means moving to another job after retirement age. (APPL 2004 member survey)

Travel and Recreation

What do we know about trends, possible changes in trends, and possible futures for:

- Travel in the U.S. and globally
- Recreational pursuits
- Tourism
- Visitation to public lands

A long-term pattern of increasing outdoor recreation participation changed into a downward trend in 2001 and even more strongly in 2003. The drop in frequency of participation was most noteworthy among young adults – a group that reports high access to the Internet. (Roper 2004)

People most concerned about the environment are especially interested in outdoor recreation. (Roper 2004)

Residents of the Northeast and South are significantly less likely to participate in virtually all forms of outdoor recreation than those in the Midwest and the West. (Roper 2004)

Disparity in outdoor recreation participation exists, with White Americans participating in an average of 5.2 different outdoor recreation activities compared to 3.5 for Hispanic Americans and 2.3 for African Americans. (Roper 2004)

Recreation participation by families with children is generally above the national average, and families with one or more children under the age of seven are most active. (Roper 2004)

Accommodating future growth in recreation demands will likely fall on public properties and providers, private landowners are continuing to close more land. (USDAFS 2004)

While 47% of travelers visiting national parks plan their trip one month or more in advance, 25% do not decide where they are going to stay before their visit. (Travel Industry Association)

A key trend reshaping the travel industry is people traveling at will, due to Internet access to information, low-cost and no-frills airlines, and last minute discounting of travel opportunities. (Hospitality Net)

Willingness to volunteer on federal lands is strong, with 21% of Americans expressing a personal interest in being a public lands volunteer. (Roper 2004)

Despite high interest, actual volunteerism on public lands involves few Americans – under 6% of the adult population. The chief reason reported for not volunteering by those reporting an interest was “too busy” at 53%. Yet the second most common reason was that they “didn’t know how to get started” at 25%. (Roper 2004)

Increasing attention is being drawn in the U.S. to the importance of heritage tourism among all demographic groups. (Trends in Demographics and Information Technology Affecting Visitor Center Use, NPS, 2003)

Consumers are seeking out uniquely different experiences when they travel, yet expect certain standards of destinations, tour companies, lodging establishments and transportation. What has evolved over the past decade is concern that destinations are morphing into homogenous places that offer like experiences - with a loss of distinctive characteristics, an erosion of local customs and cuisines, an absence of regional architecture and general culture. In an effort to please everyone and make them feel “at home,” the travel industry risks sacrificing the very things that attracted customers in the first place. (National Geographic Traveler and Travel Industry Association)

65% of travelers are city-dwellers living in urban areas with populations of 500,000 or more. Among those visiting a national park while traveling in the last five years, 75% stayed overnight or within 10 miles of the parks on their most recent trip. (National Geographic Traveler and Travel Industry Association)

45% of American travelers have a college education, thus the average annual household income among travelers is higher than that of the U.S. population in general - \$62,720 vs. \$57,047. (National Geographic Traveler and Travel Industry Association)

71% of the traveling American public indicates it important to them that their visits to a destination not damage its environment; 61% agree that their travel experience is better when the destination preserves its natural, historic, and cultural sites and attractions; and 53% agree that their travel experience is better when they have learned as much as possible about their destination’s customs, geography and culture. (National Geographic Traveler and Travel Industry Association)

58% of American travelers support controlling access to National Parks and public lands so they can be preserved and protected. (National Geographic Traveler and Travel Industry Association)

While the number of sportspersons fell from 40 million in 1991 to 37.8 million in 2001, expenditures by sportspersons increased from \$53 billion in (2001 dollars) in 1991 to \$70 billion in 2001. There is a gradual decline in hunting and angling – from 14.1 million hunters in 1991 to 13 million in 2001, and from 35.6 million anglers in 1991 to 34.1 million in 2001. (USFWS)

70% of Americans have visited Disneyland or Disney World. (E. Sheffield, California State University, Chico)

50% of American adults have taken an adventure vacation in the past 5 years. (E. Sheffield, California State University, Chico)

Continued development of outdoor recreation "gear and toys," including more so-called "extreme" recreation such as skate parks, snowboarding, and white water canoeing leads to new uses, user conflicts, and unforeseen impacts. (APPL 2004 agency survey)

While Americans are traveling abroad less, over the past few years, NPS has seen a decline in visitation to Parks. (APPL 2004 agency survey)

Travelers to NPS sites continue to be mostly white middle class. (APPL 2004 agency survey)

Changing demographics, compressed leisure time, rising gas prices, and economic constraints result in changes in patterns of public land visitation, including: more people making park visits closer to home, fewer extended family vacations to park destinations, staying for insufficient periods of time to participate in formal park interpretive programs, increasing demand for day use swim beaches and picnic areas. (APPL 2004 agency survey)

Aging baby boomers seek easier ways of recreating but have more money to spend, resulting in desire for greater conveniences like full hook-up campgrounds. (APPL 2004 agency survey)

Foreign visitation is down and domestic visitation is increasingly regional. (APPL 2004 agency survey)

Public lands will see more 55+ visitors, and more "escapees" from cities, who will want more services. Many of these visitors will be willing to pay for a quality experience. (APPL 2004 agency survey)

Demographics

How will our population look in the future?

- Age
- Gender
- Race, culture, national origin
- Distribution in cities, suburbs, exurbs, rural areas, etc.
- Education
- Mobility
- Demographics in the context of public lands

World population in 2015 will be 7.2 billion, up from 6.1 billion in the year 2000, and in most countries, people will live longer. 95% of the increase will be in developing countries, nearly all in rapidly expanding urban areas. (National Intelligence Council)

U.S. population clock currently projects one birth every 8 seconds, one death every 12 seconds, one international migrant (net) every 24 seconds; for a net gain of one person every 11 seconds. (U.S. Census Bureau)

Every state gained in population between 1990 and 2000. Only Washington, DC lost population. Between 2000 and 2020, the U.S. population is expected to grow from 275 million to 571 million. (E. Sheffield, California State University, Chico)

The percentage of population by ethnic group will change as follows: Anglo-American from 76% to 50%, African American from 12% to 15%, Hispanic American from 9% to 21%, and Asian American from 4% to 11%. (USDAFS Southern Research Station)

Latin Americans are the fastest growing segment of immigrants at 48%, followed by Asians at 25%, and Europeans at 18%. (U.S. Census Bureau, 2002 Data)

The Hispanic population is growing four times as quickly as the U.S. population at large. (U.S. Census Bureau)

Migration continues from the Northeast and Midwest to the South and West. (E. Sheffield, California State University, Chico)

Much of the growth in population is happening next to public lands. (USDAFS 2004)

The population of California is projected to have the largest net increase in U.S. population. By 2020 it is projected to increase by 31% compared to 2000, with a 58% increase in Hispanic population, 55% increase in Asian/Pacific Islanders, a 29% increase in Native Americans, a 20% increase in African Americans, and a 4% increase in persons of European decent. By 2030, Hispanics will comprise 43% of the state's population. (E. Sheffield, California State University, Chico)

The median age in 2000 was 35, by 2020 it is projected to be 38. (E. Sheffield, California State University, Chico)

Baby Boomers are now moving into their retirement years, leading to increased leisure time and greater demands on parks. They are the mobile generation of the next 20 years. (Trends in Demographics and information Technology Affecting Visitor Center Use, NPS, 2003)

The Baby Boom generation represents the largest untapped pool of potential volunteers for the nonprofit community in recent history. Members of the working population aged 50 to 64 are more likely to have graduated college, volunteered in their youth and had parents who volunteered; all indicators of higher levels of adult civic involvement. (Independent Sector)

The over-50 population is expected to grow by 18.3 million people over the next ten years. (Independent Sector)

People continue to live longer. By the year 2025, 60 million Americans will be 65 or older. (Aging Americans: Stranded Without Options)

Less than one third of Americans 65 or older have access to adequate public transportation to meet their daily needs. More than half of all non-drivers aged 65 or older stay at home in a given day, often because they do not have transportation options. (Aging Americans: Stranded Without Options)

Born between 1965 and 1976, Gen-Xers combine education, skill development and work, and begin to do so at a very young age. They regard themselves as entrepreneurs who want to be recognized for their skills, and place little faith in job security. (United Way)

Gen-Xers were the latch key children of the 1980's and are determined to raise their families differently. Their families, their friends, their life is far more important than work – they are not workaholics. (United Way)

Gen-Xers have already had a significant impact on the workplace, resulting in more flexibility in work hours, telecommuting, job sharing, and long-term contracting. (United Way)

Increased urbanization of America, and decreasing rural populations. (APPL 2004 agency survey)

Partnerships continue to follow the communities with the most education, resources, and time to devote to community activities. (APPL 2004 agency survey)

Between 2002 and 2012, the Bureau of Labor Statistics projects that 35 million workers will leave their occupations permanently and will need to be replaced.

For high-income receiving countries, immigration will relieve labor shortages and otherwise ensure continuing economic vitality. It will also complicate political and social integration; some groups will continue to mobilize popular sentiment against migrants, protesting the strain on social services and the difficulties in assimilation. (National Intelligence Council)

Technology

What do we know about trends, possible changes in trends, and possible futures for technology as it relates to areas like:

- Communications
- Information sharing
- Publishing
- Education and interpretation
- Expectations for speed of action and interaction
- Retail sales

Internet use has grown dramatically worldwide, from 16 million users in 1995 to more than 757 million in 2004. (Worldstats.com)

Over 60% of Americans now have access to the Internet. Two-thirds of all of those under 35 and 40% of those 55 and older use the Internet. (Network for Good and the Bridgespan Group)

A majority (58%) of Internet users are using the Internet to search for information, volunteer, donate, and sign petitions for causes or organizations they want to support. (Network for Good and the Bridgespan Group)

Growth continues in ownership and use of electronic communications and leisure options by the American public – strategies are needed to address ways to convert a potential deterrent to recreation participation into a catalyst for increased participation. (Roper 2004)

Federal site visitors are above average in PC ownership and Internet access at home. (Roper 2004)

In one year wildlife watchers spent more than \$2.6 billion on cameras, video cameras and associated photographic equipment. Binoculars and spotting scopes accounted for \$507 million in spending. (USFWS 2001 National & State Impacts on Wildlife Watching)

The telecommunications, computer, entertainment, and media industries are building charitable giving programs around technology. (GrantStation)

The Internet is many people's starting point for researching major purchases, including travel. 67% of Germans, 63% of U.K., and 52% of U.S. respondents to a Euro RSCG survey responded that their first stop is usually the Internet.

The Internet is the preferred method of planning a trip including a national park visit, with 38% using this resource - 45% Generations X and Y, 41% Baby Boomers, and 27% Matures. (Travel Industry Association of America)

Wireless LANs will be the predominant media of information/data exchange in a store. This, in turn, would enable things like: mobile POS terminals, mobile information kiosks, and better store management. (Leading Edge Group)

Checking out will not be restricted to long lines at checkout counters. Each SKU will be checkout-enabled and it would be possible to scan it at the aisle/rack where it is stored. (Leading Edge Group)

Hand held devices like mobile phones and PDAs will become a predominant media for Internet access and transactions, bridging the gap between desire and action as they are accessible anywhere and one doesn't have to go to a PC for fulfillment. (Leading Edge Group)

For individuals and companies that can conduct most of their business via telephone and broadband links, moving away from big cities to rural areas is now more practical. (Hospitality Net)

People will expect the information they receive to be interactive and personalized. They will want it to be engaging, age-appropriate, culture-appropriate, and in preferred languages. (Trends in Demographics and Information Technology Affecting Visitor Center Use, NPS, 2003)

People will increasingly want portable, mobile information that goes to the park with them. They will expect to download a trail map into a personal digital assistant, as well as information on current traffic and weather conditions. Up-to-date data satisfying the needs of individual visitors will be delivered on demand in real time, wherever and whenever people want it. (Trends in Demographics and Information Technology Affecting Visitor Center Use, NPS, 2003)

There is public expectation that agencies keep up with latest technology, for example, requests for Internet service/capabilities at our campgrounds. The desire for automation as a convenience for the public and as a cost saving factor in operation and management can lead to new methods of providing visitor information, automated entrance stations, self-serve reservation stations, and other services via computer kiosks at campgrounds and visitor centers. (APPL 2004 agency survey)

Technology is a trend away from "hands on" experience. Too much reliance on computer generated experiences instead of the real thing may result in future generations that do not have a love and appreciation of our natural resources. (APPL 2004 agency survey)

Technology advances will help us to create distance learning programs for training purposes. (APPL 2004 agency survey)

Virtual park tours can replace the genuine article. Technology has improved audio visual presentations in our park areas. (APPL 2004 agency survey)

Public lands will increasingly need to accommodate such uses as geocaching, big RV's, ATV's and PWC's. Conversely, public lands recreation could become more important as areas of respite from cell phones and other technological intrusions. (APPL 2004 agency survey)

Greater use of new technologies will impact how agencies reach out to younger audiences, re-design their visitor centers and displays, provide interpretation, and inform/educate non-visitors. Less park information will be distributed via traditional "paper" methods. (APPL 2004 agency survey)

Breakthroughs in materials technology will generate widely available products that are multi-functional, environmentally safe, longer lasting, and easily adapted to particular consumer requirements. (National Intelligence Council)

Advances in science and technology will pose national security challenges of uncertain character and scale. (National Intelligence Council)

Rapid advances and diffusion of biotechnology, nanotechnology, and the materials sciences will add to the capabilities of our adversaries to engage in biological warfare or bio-terrorism. (National Intelligence Council)

Disaffected governments, terrorists, proliferators, narcotics traffickers, and organized criminals will take advantage of the new high-speed information environment and other advances in technology to integrate their illegal activities and compound their threat to stability and security around the world. (National Intelligence Council)

A technology concern of government agencies is future-proofing. Many agencies still maintain documents created decades ago, and expect to retain them for decades more. (FileMaker, Inc.)

Effective use of technology may decrease costs for production of printed materials. (APPL 2004 member survey)

Physical environment

What changes can we expect in our physical world?

- Environmental changes
- Cost and availability of natural resources and energy
- Infrastructure

Shrinking habitat and pollution threaten the ability of many wildlife species to survive and reproduce. (Cooperative Alliance for Refuge Enhancement)

Global warming - increasing concentrations of greenhouse gases are likely to accelerate the rate of climate change. Sea level has risen 4-8 inches over the past century, and is likely to rise two feet along most of the U.S. coast during this century. Changing regional climate could alter forests, crop yields, and water supplies. Deserts may expand into existing rangelands, and features of some of our National Parks may be permanently altered. (Environmental Protection Agency)

Explosive population growth is occurring in areas where water supplies are limited and the demand for water is increasing. Nevada and Arizona lead the nation in percent change of resident population. (Water 2025)

The next major environmental crisis we will face will be as a result of poor planning and management of our water resources. While agencies each have their own program centered on watershed management & planning, their agendas often conflict rather than the Federal community speaking with one voice on this issue, based on what is in the best interest long-term for the nation. (APPL 2004 agency survey)

Most of the federal infrastructure that manages the finite usable water supply in the West is approaching 50-60 years of age, and some facilities are almost a century old. (Water 2025)

“Smart Growth” – land use decisions that focus on energy efficient neighborhood and building design as well as efficient locations could reduce vulnerability to energy supply and price spikes, lessen air pollution, reduce greenhouse gas emissions, and increase affordability of housing and commercial space. (Funders’ Network for Smart Growth and Livable Communities)

While the U.S. represents only 5% of the world’s population, it consumes 25% of its energy and generates about 25% of its greenhouse gas emissions. (Funders’ Network for Smart Growth and Livable Communities)

U.S. citizens use more energy per capita for transportation than do citizens of any other industrialized nation. (Funders’ Network for Smart Growth and Livable Communities)

Automobile travel has increased substantially over the past few decades, far outpacing population growth. From 1980 to 1997, vehicle miles traveled grew by 63%, an increase of nearly three times that of the population growth during the same period. (Funders’ Network for Smart Growth and Livable Communities)

Weather continues to have disastrous effects on parks and other public lands, from forest fires to floods, to hurricanes – taking a toll on the natural surroundings, infrastructures, and visitation. (APPL 2004 agency survey)

Invasive exotic plants and animals annually destroy 8 million acres of habitat, including that which is important to recovering threatened and endangered species. (Cooperative Alliance for Refuge Enhancement)

Looking holistically at the landscape: merging nature and culture is a growing trend. (APPL 2004 agency survey)

In more urban and currently more economically stable areas, public lands are increasingly looked at as open space or green space assets. Counties and municipalities are making grand plans for green space networks, setting up multi-million dollar bonds, and purchasing corridors to provide connectivity between large blocks of open space. In these areas people are sensitive to each tree that is cut and each animal that may be hunted, creating a need for education on how and why we need to actively manage public lands - burn, thin, hunt - and how conservation is not always strictly preservation. (APPL 2004 agency survey)

More people, resulting in increased demands on the environment, conflicting uses by developers, more chances for resource degradation, and more pressures on public lands including unmanaged recreation, invasive weeds, habitat fragmentation, and fire hazard. (APPL 2004 agency survey)

The number, size and history of hurricanes has caused a significant rise in insurance premiums, affecting risk management, profits, etc. (APPL 2004 member survey)

Despite a 50% increase in global energy demand, energy resources will be sufficient to meet demand; the latest estimates suggest that 80% of the world's available oil and 95% of its gas remain underground. (National Intelligence Agency)

Fossil fuels will remain the dominant form of energy until 2015 despite increasing concerns about global warming. (National Intelligence Agency)

Contemporary environmental problems will persist globally over the next 15 years. Greenhouse gas emissions will increase substantially. With increasingly intensive land use, significant degradation of arable land will continue as will the loss of tropical forests. The depletion of tropical forests and other species-rich habitats, such as wetlands and coral reefs will exacerbate the historically large losses of biological species now occurring. (National Intelligence Agency)

The consensus on the need to deal with environmental issues will strengthen; however, progress in dealing with them will be uneven. (National Intelligence Agency)

Federal government

What do we know about trends, possible changes in trends, and possible futures for the federal government broadly in terms of:

- Size
- Differences among agencies or broad areas of government
- Budgeting
- Accountability
- Interaction with the public
- Functions and programmatic emphases

A new public service is emerging in which there will be fewer permanent federal employees, more temporary employees, and more functions performed by contractors and grantees. Outsourcing to private has accelerated. (GrantStation)

The U.S. Department of Transportation estimates that maintaining current public transportation services would require a 30 percent increase in current funding levels, and improving services would require an 81 percent increase in current funding levels. (Aging Americans: Stranded without Options)

Proponents of privatization would like to see the government dispose of all public lands and all natural resources and ... put [them] in the hands of the private sector and the industrial sector. (Bruce Babbitt, 2003 Interview)

In hard economic times the government typically approves some large projects to stimulate the economy. This presents an opportunity for agencies to be ready with good projects that can improve efficiency and reduce future operating and maintenance costs. (APPL 2004 agency survey)

There is an expanding role of partnerships, with a cultural shift needed to embrace partners. (APPL 2004 agency survey)

Agencies are becoming more collaborative both within the federal government and between local and state agencies. (APPL 2004 agency survey)

The responsibilities of once “semiautonomous government agencies” increasingly will intersect because of the transnational nature of national security priorities and because of the clear requirement for interdisciplinary policy responses. (National Intelligence Council)

The United States will continue to be identified throughout the world as the leading proponent and beneficiary of globalization. (National Intelligence Council)

The United States will have greater difficulty building coalitions to support its policy goals, although the international community will often turn to Washington, even if reluctantly, to lead multilateral efforts in real and potential conflicts. (National Intelligence Council)

International cooperation will continue to increase through 2015, particularly when large economic stakes have mobilized the for-profit sector, and/or when there is intense interest from nonprofit groups and networks. (National Intelligence Council)

State and local government

What do we know about trends, possible changes in trends, and possible futures for state and local governments broadly in terms of:

- Size
- Functions and programmatic emphases
- Differences among agencies or broad areas of government
- Budgeting
- Accountability
- Interaction with the public

Towns, cities and regions are marketing their natural and historical features to capture the trend in “cultural travel” – from folklore, to heritage sites, to festivals. (Travel Industry Association)

State standards for sales and even income tax exemption will tighten. (Hurwitz & Associates)

Decline in tax revenues continues, state taxes as a share of economy are at a 30 year low, consumption taxes are on the increase (\$9.9 billion). (The Council of State Governments)

Frequent changes in commissioners at the local level requires re-introduction and education of partnering program goals and possibilities. What may have been initiated by or proposed to a previous administration is now unacceptable to the current one. (APPL 2004 agency survey)

Local governments are reluctant to absorb additional operation and management costs for federal lands, and there is a resistance to any more federal influence than necessary. (APPL 2004 agency survey)

Environmental restrictions from states are being levied that affect various federal agency operations. (APPL agency survey)

State policy-makers are focusing their efforts on investing in education for immigrants and their children as a vital social and economic interest. (The Council of State Governments)

States are encouraging the development of renewable energy sources that reduce the nation's dependence on imported fuels and could dramatically stimulate the economy as well. (The Council of State Governments)

State and local governments face increasing pressure to react quickly to the changing needs of citizens, elected officials, and other levels of government. One reason is that over the last decade private businesses have dramatically raised expectations for customer service. Another is that in the wake of 9/11, requests concerning building security, for example, have become urgent. (FileMaker, Inc.)

Reports – many, often, and for multiple requestors – are a defining characteristic of government. The flexibility to generate reports on demand, and to easily modify report content, increases efficiency and reduces the time to deliver services or receive funding. (FileMaker, Inc.)

The state-local government partnership is waning. The historical partnerships that existed and were honored for decades have been eroded by devolution, mandates, pre-emption and initiatives. In some cases, the outcome has become open hostility and intense competition between state and local governments. (National Association of Counties)

There is a substantial erosion of local governments' fiscal health, which, if continued, threatens their long-term fiscal sustainability. (National Association of Counties)

People perceive local government entities to be redundant, fragmented, competitive and inefficient. Citizens see service-delivery models as complex systems that should function in an integrated, coordinated, seamless manner irrespective of what agencies or entities contribute to providing that service. (National Association of Counties)

Citizens are not engaged with/by their local governments; in fact, they are becoming anti-government. (National Association of Counties)

There is an erosion of grassroots government, with power and authority being usurped upward. (National Association of Counties)

Federal land management agencies

What do we know about trends, possible changes in trends, and the possible futures for federal land management agencies in terms of:

- Mission and purpose
- Programs
- Size
- Structure
- Regulations
- Partnership-building
- Attitudes toward cooperating associations
- Attitudes toward friends groups
- Attitudes toward concessionaires

Federal lands are a magnet for recreation, with 55% of respondents to a 2004 published Roper Survey reporting a visit to an area managed by a federal agency over the most recent 12 months.

The Federal public lands system includes 264 million acres managed by BLM, 232 million acres by USDAFS, 93 million by USFWS, 75 million by NPS, and 12 million by USACE (2001 statistics).

While statistics vary, based on year 2000 statistics from USACE, the distribution of recreational visitation to public lands is as follows: 33% USACE, 25% NPS, 18% FS, 9% TVA, 8% Reclamation, 5% BLM, 2% USFWS.

Americans appear unable to accurately recognize the identities of various federal outdoor recreation-providing agencies. (Roper 2004)

For federal properties, management of ecosystems and recreation are high priorities, but funding is not keeping up with those priorities. (USDAFS 2004)

There is a trend toward an increasingly complex institutional setting for decision-making that includes more integration with existing regional, rural, and metropolitan planning processes, ecosystem management, and interagency cooperation. (Trends in Demographics and Information Technology Affecting Visitor Center Use, NPS, 2003)

The National Strategy for Recreation promotes the privatization of public lands through increased collaborative stewardship projects and increased public/private partnerships through challenge cost-share agreements. (former USDAFS Chief Mike Dombeck speech, 2002)

There is a trend toward “sweeping motorization” of public lands, including off-road vehicle use, jet skis, jet boats, and snowmobiles. (former USDAFS Chief Mike Dombeck speech, 2002)

Many visitor facilities are outdated. Maintenance backlogs exist for most agencies. (APPL 2004 agency survey)

The National Wildlife Refuge System, managed by USFWS, currently operates on less than \$300 million annually, and has a per-acre budget that is 1/5 the size of the NPS. Most refuges are operated with minimal staffing and approximately 200 refuges have no on-site staff at all. (Cooperative Alliance for Refuge Enhancement)

National Historic Landmarks are nationally significant historic places designated by the Secretary of the Interior because they possess exceptional value or quality in illustrating or interpreting the heritage of

the United States. Today, fewer than 2,500 historic places bear this national distinction. (National Park Service, National Historic Landmarks Program)

Park users are increasingly multi-cultural – Hispanic and Asian. Groups often self-segregate by the time of day or location of place. (APPL 2004 agency survey)

Agencies are experiencing greatly increased security costs and more stringent environmental regulations, affecting planning, operations, and maintenance. (APPL 2004 agency survey)

The war effort and emphasis on funding defense initiatives particularly impacts the Corps of Engineers, with over 500 employees stationed in Iraq on a daily basis, and a diminishing of efforts on the domestic/recreation/interpretive fronts. The Corps has consolidated into Regional Resource Centers located in strategic parts of the world. (APPL 2004 agency survey)

One of three trends most observed and commented upon by agency staff is the collaboration, sharing and acceptance of ideas, and consolidation of efforts among agencies. This is exemplified in consolidated databases, systems, and offices; National Recreation Reservation System and Rec.Gov; Four C's Committee and Joint Ventures conference; shared design and facilities construction models; and across-agency staff training. They predict that agencies will continue to work more closely together and combine resources to make programs work. Barriers that prevent working together and mingling of funds will be eliminated. (APPL 2004 agency survey)

The second trend noted by agency staff is partnerships, and the cultural change underway in agencies to encourage collaboration and partnerships, especially in light of shrinking agency budgets. While agency staff support partnerships as a way to do business and as a way to connect the American public with land management agencies and issues, some agency staff expressed concern regarding a potential loss of control in local partnership projects; that there are not enough field staff to promote, organize and oversee partnerships; and that employees often confuse the collaboration philosophy with outsourcing. (APPL 2004 agency survey)

A third trend expressed by federal lands agency staff and their partners is doing more with less. While there is more recreation pressure, there is less money to buy and manage land. There is a fear that shrinking agency budgets and downsizing risks the future of the agencies' stewardship responsibilities; that interpretation, recreation, and visitor services are often the functions that are cut first; and that philanthropic dollars are offsetting federal funding for basic park needs. For partners, vacant agency positions, closing or reducing park hours, programs and services all have an affect on revenue – further reducing financial support for the agency. (APPL 2004 agency and member surveys)

The amount of timber harvested will continue to decline while the role that recreation and tourism play in local economies will rise. (APPL 2004 agency survey)

A huge amount of the workforce is nearing retirement age, less recruitment is occurring at the entry levels, and the workforce is continuing to shrink as jobs are left vacant after people retire. Corporate knowledge is being lost on a large scale. (APPL 2004 agency survey)

There is a slow trend to more diversity in workforce. While the public is increasingly urban and multi-cultural, the agencies currently are not. (APPL 2004 agency survey)

Within agencies there will be fewer highly specialized employees, instead more and more generalized employees with a variety of program responsibilities. (APPL 2004 agency survey)

Managers are increasingly required to be more entrepreneurial and to develop partnerships, but they often don't have the training necessary in such areas as philanthropy, sustainable revenue sources, and

developing a comprehensive business plan in the context of government funding and regulations. (APPL 2004 agency survey)

Agencies are under intense scrutiny by Congress. There is a concern that government officials encourage agencies to be entrepreneurial, but also want to impose strict regulations, making it difficult work creatively with partners. (APPL 2004 agency survey)

More interest in things that produce social and economic benefits for communities adjacent to public lands, i.e. Preserve America, and more involvement with adjacent communities as partners, i.e. heritage areas and gateway communities. (APPL 2004 agency survey)

Controversy continues to grow over public land uses and the need for protection. (APPL 2004 agency survey)

There is a thought process to consolidate recreational assets (public lands) to one, or at least fewer, federal agencies, most likely under the Department of Interior. (APPL 2004 agency survey)

The emphasis is shifting from how private sector businesses/corporations support agency lands to how agency lands and activities support businesses/corporations. (APPL 2004 agency survey)

State and local land-managing agencies

What do we know about trends, possible changes in trends, and possible futures for land-managing agencies at the federal, state and local levels in terms of:

- Mission and purpose
- Programs
- Size
- Structure
- Regulations
- Partnership-building
- Attitudes toward cooperating associations
- Attitudes toward friends groups
- Attitudes toward concessionaires

The mission of state parks is to provide close-to-home resource-based recreation opportunities at moderate cost. State parks had 758 million visitors in 2001. (National Association of State Park Directors)

Most Americans (91%) using state parks as a day-time resource and 9% for overnight stays. (National Association of State Park Directors)

5,655 state park areas total 13 million acres. State parks represent less than 2% of the total outdoor recreation estate, but over 29% of public lands visitors. (National Association of State Park Directors)

State lands, especially state parks, are reaching maturity, except for high-end development. (USDAFS 2004)

The distribution of park acreage and areas is not consistent with population distribution. (National Association of State Park Directors)

State support for state parks has, at best, been neutral, with few additional dollars being made available. (National Association of State Park Directors)

The loss of manpower is evident, but the expectations remain the same. (National Association of State Park Directors)

If there is a trend becoming visible among the various state park systems, it is that of forming "foundations" to assist in supporting state parks and allied state conservation agencies, such as wildlife or forests. (National Park Trust)

In times of recession when tax dollars shrink parks are usually affected more than other state agencies. (National Park Trust)

State legislatures are putting pressure upon state park agencies to become more "self sufficient," covering operating expenses with revenues from entrance fees, campground use fees, cabin and lodge room rental fees, picnic shelter rentals, and profits from retail sales of other goods and services. As of 2001, only nine states still lacked some type of entrance fee or parking fee for state parks. (National Park Trust)

Most state legislatures seem to understand that the investment in additional capital construction, land acquisition and heavy capital maintenance items cannot be covered by revenues collected. These expenses typically come out of bond issues or general revenue tax funds. (National Park Trust)

State park agencies have reached out to form mutually productive partnerships with NGO's. (National Park Trust)

It is not easy to define a state park by conforming to a single set of attributes – rather they are individualistic and unique in many cases to a particular state, region, or purpose. (Indiana University Department of Recreation & Park Administration)

State parks represent the largest share (62.6%) of all areas managed by state park agencies; followed by recreation areas (11.5%), natural areas (9.8%), forests (6.4%), fish/wildlife areas (1.42%), and historic areas (.74%). (Indiana University Department of Recreation & Park Administration)

State parks are becoming more involved in commercial enterprises. In some cases the enterprises are contracted out, but more frequently the enterprises are small operations run by the state park manager, the staff and volunteers. Over the last 15 years the development of entrepreneurial operations in state parks has grown dramatically. (National Association of State Park Directors)

Increased partnering is becoming more common. A number of states are negotiating for a single source soda provider, others are turning to corporate sponsors to provide resources that would not be available any other way. Use of friends groups has grown dramatically over the last 10 years and will likely grow even faster over the next 10 years. (Indiana University Department of Recreation & Park Administration)

Education and interpretation generally

What do we know about trends, possible changes in trends, and possible futures for education and interpretation in the US in terms of: Potential and target audiences

- Programmatic emphases
- Methods of delivery
- Sales of educational materials

During the past two decades there has been a significant increase in the participation of youth in volunteer activities, in part as a result of an emphasis on service in school (service learning), including

volunteer activities of honor societies, service-learning, and community service requirements for high school graduation. (Independent Sector)

People expect education to be entertaining and technologically sophisticated, especially if it's occurring outside the traditional classroom. (Trends in Demographics and Information Technology Affecting Visitor Center Use, NPS, 2003)

There is a general trend toward a more educated population, but with bigger disparities between groups. Latinos trail white non-Hispanics and African Americans in educational levels. (Trends in Demographics and Information Technology Affecting Visitor Center Use, NPS, 2003)

The challenge in culturally diverse areas is how to create interpretive themes and messages that will be understood by a broad range of people. (Trends in Demographics and Information Technology Affecting Visitor Center Use, NPS, 2003)

There is an increase in the need for multi-lingual materials and methods to generate a quality experience for all types of users. (APPL 2004 agency survey)

Education and interpretation need to do much more to relate to urban, ethnic, and tribal audiences. Marketing of history and heritage must include heretofore underserved organizations. (APPL 2004 agency survey)

55% of 3- and 4-year-olds are currently enrolled in school, up from 20 percent in 1970. (U.S. Census)

21% of elementary and high school students have at least one foreign-born parent. (U.S. Census)

9.8 million school-age children (5 to 17) speak a language other than English at home. These children make up nearly 1-in-5 in this age group. Most of them (6.9 million) speak Spanish at home. (U.S. Census)

99% of public schools have Internet access. There are five students for every instructional computer connected to the Internet. As recently as 1995, the proportion was 50 percent. (U.S. Census)

Average tuition, room and board (for in-state students) at the nation's four-year public colleges and universities for an entire academic year now costs \$9,953. That is up 87 percent from 1990. (U.S. Census)

Home-schooling continues to increase as an alternative to traditional school systems. (APPL 2004 member survey)

There is more emphasis on standardized testing and state frameworks in education than ever before. (APPL 2004 agency survey)

Due primarily to rising costs and changing emphases, school field trip opportunities are limited. (APPL 2004 agency survey)

Meeting the needs of changing populations, with an emphasis on reading and math, may de-emphasize subjects such as history, natural sciences, arts and geography in the classroom. (APPL 2004 member survey)

Schools are using technology more than ever. Teachers are accessing the Internet, but have limited time, so information must be concise and readily available to them. (APPL 2004 agency survey)

In interpretation, there is an increasing interest (and demand on behalf of funders) in outcome based evaluation. (APPL 2004 agency survey)

There is increased use of non-personnel services to achieve greater accessibility to all populations. (APPL agency survey)

There is increasing recognition that people learn in different ways. (APPL 2004 member survey)

Education and interpretation in land-managing agencies

What do we know about trends, possible changes in trends, and the possible futures for education and interpretation in land-managing agencies specifically in terms of:

- Potential and target audiences
- Programmatic emphases
- Methods of delivery

Eventually, with increased technology options, public lands might not need physical visitor centers in the traditional sense, except for restrooms and food service. (Trends in Demographics and Information Technology Affecting Visitor Center Use, NPS, 2003)

The traditional information and educational functions of visitor centers will increasingly extend beyond the walls of the building, facilitating pre-trip planning, travel to and from parks, and post-trip recollection and sharing. (Trends in Demographics and Information Technology Affecting Visitor Center Use, NPS, 2003)

More use of Internet. Parks are moving more towards TEL (long distance learning) due to travel restrictions and budget cuts. Government is investing more in E-Learning. (APPL 2004 agency survey)

There is a need to think forward and invest in programming to engage youth. What worked yesterday probably will not work tomorrow. (APPL 2004 agency survey)

Adults have less interest in the standard interpretation programs and more interest in 'life experience' programming such as "Living on the Road" a presentation about living in an RV, programs on how to invest in the environment/ environmental friendly companies or "green stocks," and fitness education type programming as well as volunteer efforts. (APPL 2004 agency survey)

There is a trend and need for interpreting the larger story, in the context of heritage, community, resources, etc. to the public. (APPL 2004 agency survey)

Greater reliance on non-personal interpretation such as publications, AV programs, and exhibits. (APPL 2004 agency survey)

Staff from all agencies expressed concern that with funding issues ever at the forefront, interpretation and education are the first services to either be reduced or eliminated. However, a few noted education and interpretation as increased priorities within their agency. (APPL 2004 agency survey)

Rapid technological changes are increasingly impacting nonpersonal interpretive media. AV delivery systems are obsolete almost as soon as they are installed. New opportunities for nonpersonal interpretive services are not being exploited by parks because of funding and time issues. (APPL 2004 agency survey)

Interpreters are still being trained primarily in personal delivery of interpretive messages despite the fact that fewer visitors are attending these types of programs. (APPL 2004 agency survey)

With U.S. residents traveling and participating in recreation closer to home, the challenge will be to continue to provide interesting and meaningful interpretation for these repeat visitors. (APPL 2004 agency survey)

Web is seen as an increasingly critical method to reach especially non-traditional park visitors. Desire is to use this venue for virtual visits that are educational and interpretive, rather than just as a source of information and trip planning. (APPL 2004 agency survey)

Few interpretive professional employees are coming up the career ladder. (APPL 2004 agency survey)

Budget constraints result in fewer rangers and fewer visitor contacts, and static interpretive displays. (APPL 2004 agency survey)

There is an increased use of volunteers for interpretation and visitor services, as well as closer working relationship between the partner associations and lands agencies on education initiatives. (APPL 2004 agency and member surveys)

Retail sales and operations

What do we know about trends, possible changes in trends, and the possible futures for retail sales and operations in terms of:

- Patterns of sales
- Markets
- Approaches to retailing
- Consumer trends

Annual consumer expenditures for books will reach \$44 billion by 2008, including a roughly 10% increase in trade, mass market, and professional publishing revenues. (Book Industry Study Group, Book Industry Trends 2004)

Buying and giving of gifts to family and friends is currently a \$253 billion market – representing a unique opportunity to directly touch two target markets at once: the gift giver who buys the gift and the recipient to whom the gift is given. (Unity Marketing)

Out of the total \$2,062 annual gifting budget, the typical gift giver spends 40% at Christmas, leaving 60% of gift spending to occur over the course of the year. (Unity Marketing)

Dollar stores (small format value retailing) continue rapid growth, with 8,000 more stores projected to open in the next five years. (Retail Forward)

Growing popularity of used books, and the increased traffic at used bookstores and online retailers. (American Booksellers Association)

The percentage of U.S. households purchasing at least one book intended for someone under age 14 has dropped. Limited discretionary spending in an uncertain economy, a lack of free time to read to overscheduled kids, diminished adult reading copied by children, and lagging population growth are possible factors in a stagnant market. (Barrie Rappaport, chief analyst, Ipsos BookTrends)

Per book spending for children's books increased due to the popularity of interactive/sound books and the emergence of hardcover juvenile fiction titles like Harry Potter. (Barrie Rappaport, chief analyst, Ipsos BookTrends)

The “pop-up retail” trend is being demonstrated around the world, with retail initiatives that pop up unannounced, quickly draw crowds, and then disappear or morph into something else – adding a fresh feel, exclusivity and surprise. Examples include temporary or seasonal stores, a “fashion bus” that brings designer clothes to areas that don’t have easy access to boutiques and outlets, and a virtual on-line website that features on a weekly basis a rotating handful of online access to boutique collections. (Trendwatching.com)

“No-Frills Chic” offers low cost goods and services that add design, high quality third-party elements, and/or exceptional customer service to create top-quality experiences at bottom prices. Examples include Target, JetBlue and Song airlines, Trader Joes. (Trendwatching.com)

“Early-Birding” is a proliferation of advance online bookings, early notifications and pre-ordering for a multitude of desirable and anticipated services and goods that is catching on worldwide. (Trendwatching.com)

“Curated consumption” is a trend where buyers and editors pre-select for time-starved consumers what to buy, experience, wear, read, drink, and so on. Shops increasingly look like museums, art galleries, and antique stores with products telling a story, but edited down to a manageable number of choices. Magazines, television personalities, and books echo the trend. Examples include stores like Anthropologie and Urban Outfitters, personalities like Oprah and the Queer Eye team, and magazines like Lucky for Women and Cargo for men. (Trendwatching.com)

On-line bookstores are some of the most effective businesses on the Internet. The Net is also enabling small booksellers to start businesses and survive in the tough market without having to set up traditional shops. (Abebooks.com)

Sales relate to the state of the economy. The 1990's were prosperous times and sales were good -- sales are currently weak. (APPL 2004 agency survey)

Growth in mainline bookstores, museum stores, and other specialty retailing increases visitor expectations for cooperating association sales outlets, service, professionalism, display, theme-related products, point of sales systems, and web sales. (APPL 2004 member survey)

Agency approval process for sales items, and agency expectations for associations to sell certain products are often not in keeping with customer demands. (APPL 2004 member survey)

Other sources of earned income beyond book sales will continue to increase for cooperating/interpretive associations. (APPL 2004 member survey)

The public has demonstrated an interest in benefiting causes they believe in through their purchases – by either buying from nonprofits, or purchasing items where a portion of the purchase price benefits a nonprofit. (APPL 2004 member survey)

Increasing freight costs impact cost of goods sold and abilities to compete. (APPL 2004 member survey)

The publishing world has changed dramatically and it is now difficult to have a viable publishing program if you don’t sell through the big chain outlets. (APPL 2004 member survey)

Sales are increasing for non-book items, sales of books decreasing – visitors expect books plus much more from associations. (APPL 2004 member survey)

Non-profit organizations in the US

What do we know about trends, possible changes in trends, and the possible futures for non-profits in the US in terms of:

- Numbers, size, composition
- Mission and function
- Structure
- Governance and decision-making
- Finances
- Mergers

Revisiting the mission every three years, and refining and amending it so that it reflects shifts in the environment and the changing needs of changing customers, as part of a formal self-assessment process will be a key to success into 2010. (Frances Hesselbein, Leader to Leader Institute, 2001)

No more than five powerful strategic goals, together, are the board's vision for the desired future of the organization. Focusing on those few initiatives will make a difference, as will deploying people and allocating resources where they will have an impact. (Frances Hesselbein, Leader to Leader Institute, 2001)

Organizations will jettison current policies, practices, and assumptions as soon as it becomes clear they will have little relevance in the future. (Frances Hesselbein, Leader to Leader Institute, 2001)

Building a mission-focused, values-based, demographics-driven organization that regularly scans the environment and identifies major trends and implications. (Frances Hesselbein, Leader to Leader Institute, 2001)

Forming partnerships, alliances, and collaborations that spell synergy, success, and significance. (Frances Hesselbein, Leader to Leader Institute, 2001)

Nonprofits are developing alternative sources of funding, including: opening up retail business operations; entering into marketing agreements with major companies that sell travel, branded credit cards, or gift items with an affiliate fee going back to the nonprofit; and online businesses. (Gerald Sweitzer, Current Nonprofit Trends)

Mergers of nonprofits or alliances are occurring when multiple nonprofits have overlapping missions, serve the same community, or offer similar services. (Gerald Sweitzer, Current Nonprofit Trends; also Hurwit & Associates)

Nonprofits must increasingly demonstrate the effectiveness of their mission or programs by tracking programmatic, management and financial performance indicators. (Gerald Sweitzer, Current Nonprofit Trends)

More people work for nonprofit organizations than for the federal government and all 50 state governments combined - 8.6 million versus 6.8 million. (American Society of Association Executives)

More nonprofits will form subsidiary for-profit companies while more for-profits form controlled nonprofits. And limited partnerships between nonprofits and for-profits operating in the same industry will flourish. This will lead to some tax and reporting issues, but will also enable social problems to be addressed by a new array of innovative entities. (Hurwit & Associates)

The economic realities of providing nonprofit services, low salaries, and legal complexities will deter many from nonprofit careers. (Hurwit & Associates)

The longer an organization is around, the greater the likelihood that it will build community trust and become more successful. (APPL 2004 agency survey)

Transparent decision-making, accurate financial reporting, and use of accepted auditing procedures will reduce instances of scandal and crisis in the nonprofit community and protect the public trust that is essential to member-, donor-, and grantor-based organizations. (American Society of Association Executives)

Earned income has become primary source of revenue for many non-profits. (APPL 2004 member survey)

Over the next 15 years, nonprofit organizations will have more resources to expand their activities and will become more confident of their power and more confrontational. (National Intelligence Council)

Nonprofits will move beyond delivering services to the design and implementation of policies, whether as partners or competitors with corporations and government. (National Intelligence Council)

Membership organizations and trade associations in the US

What do we know about trends, possible changes in trends, and the possible futures for membership organizations and trade associations in the US in terms of:

- Numbers, size, composition
- Mission and function
- Member services and benefits
- Structure and types of membership
- Governance and decision-making
- Overall structure
- Dues
- Finances

Boards facing complex issues benefit from an outside perspective, by adding a “public” member outside the industry or profession to the Board. (GinnComm Group)

More than 147,000 associations exist in the U.S. Americans are forming as many as 1,000 new associations each year. (American Society for Association Executives)

The proliferation of non-profits is increasing the competition for memberships and donated money. (APPL 2004 member survey)

Nine out of 10 adult Americans belong to one association and one out of four belong to four or more associations (American Association of Retired Persons, 1998)

There has been a general decline in membership-based nonprofits since 1967. Only conservation organizations are increasing in memberships. Some report a growing trend for people not to join anything or to be increasingly selective in what they join. (APPL 2004 member survey)

The Washington, DC area is home to more associations than any other city. Associations are the third largest industry in the area. (American Society of Association Executives)

Virtually all associations (95%) publish a periodical and 39% publish books. (American Society of Association Executives)

95% of associations offer educational programs to their members, followed by 89% offering conventions, 81% using web sites and e-mail to share information with members, and 79% offering public information and education. (American Society of Association Executives)

Membership education/training is also the single largest budget item for associations – accounting for about 18% of the average association’s budget. (American Society of Association Executives)

Members form their own electronic “communities of practice” with volunteer moderators to exchange information and tackle problems in any area members feel important appropriate. (Association Management and Marketing Resources)

More than 173 million volunteer hours in community service are documented annually by associations, often using members’ skills for the greater common good. (American Society of Association Executives)

Associations dominate the \$102 billion U.S. meetings industry. 92% of associations hold meetings, accounting for 67% of the total meetings industry. (Convention Industry Council)

America’s associations are allocating \$1 out of every \$4 they spend to member education/training and public information activities – about three times the amount they spend on direct lobbying of government. (American Society of Association Executives)

Associations will continue to move away from bylaws-mandated standing committees in favor of ad hoc task forces. (GinnComm Group)

To guarantee a healthy existence, an association’s financial foundations should expand beyond being exclusively dependent upon membership dues. (I-Design)

39% of nonprofit associations have started selling products or services to supplement traditional fund raising activities. 12% say they sell videos, books or other educational products. (CitySoft, Inc.)

38% of associations that have revenue-generating programs say they offer consulting services. (CitySoft Inc.)

The average annual non-dues revenue for all trade associations in 2002 was: almost \$80,000 from meetings, almost \$60,000 from sales, over \$40,000 from fundraising, and over \$40,000 from consulting. (American Society of Association Executives)

Formal or informal alliances are a major pathway to strengthening or expanding an association’s “community of impact.” (Laurie Ford, PhD)

A renewed interest on inclusivity and process, with more volunteer and staff input into important decisions and planning, as opposed to boards and executive staff making decisions without input from the troops. (Association Management & Marketing Resources)

New models of association governance and management structure based on speed to market and communicate – the “unlayering” of the structure of the association. (Association Management & Marketing Resources)

E-mail marketing of most products, program and services will become the norm as more and more members shop electronically in their positions; but not ignoring other, more traditional delivery vehicles. (Association Management & Marketing Resources)

Volunteer leaders in associations are more concerned with having detailed alternative operating plans and succession plans in place. (Association Management & Marketing Resources)

The importance of overhead costs – ensuring that the product, program and service marketing plan decisions account for every nickel in expense, including all management support staff, CEO time, rent, utilities, etc. (Association Management & Marketing Resources)

Continuous market and needs assessment research and environmental scanning activities to ensure the association is headed in the right direction and to provide “early warning” of problems in the industry/profession or association. Use of alternative scenarios to role and “game” unanticipated events and develop courses of action. (Association Management & Marketing Resources)

Using technology to assist members in finding solutions, including “communities of practice” where members can form their own electronic communities with volunteer moderators to exchange information and tackle problems in any area members feel important and appropriate. Investigating the use of web logs and more interactive “messenger” services and their applicability to helping members solve problems. (Association Management & Marketing Resources)

A movement toward a needed long-term approach to developing the goals and objectives of the organization based on the longer-term value equation, purpose and mission of the association. (Association Management & Marketing Resources)

Considering different levels of dues based on a menu of programs and services. (Association Management & Marketing Resources)

More and more associations are outsourcing I/T operations and functions in web-based environments, using data farms and storage facilities for functions such as membership administration, meetings, publications, and other functional areas. (Association Management & Marketing Resources)

The increasing importance of peer communication and interaction as a tangible value component of the association. (Association Management & Marketing Resources)

Cooperating associations

What is happening in terms of trends, possible changes in trends, and possible futures for cooperating associations in the US in terms of:

- Numbers, size, composition
- Mission and function
- Structure
- Finances

Within NPS, the number of cooperating associations has grown only modestly over the last 45 years, from 43 associations in 1958 to 65 associations in 2003. The number of NPS cooperating associations has remained at 64 to 65 over the past decade. (NPS Cooperating Association Annual Reports)

Revenue to NPS cooperating associations from memberships and contributions is expanding significantly. Associations reported membership revenue of more than \$2.6 million in 2003, an 11% increase over

2002. In the last 10 years, contributions from memberships have increased five-fold. Unearned or contributed income from outside sources and membership income were up 30% between 2002 and 2003. (NPS 2003 Cooperating Association Annual Report)

While 80% of APPL's members have agreements with NPS, 29% of these members also serve other federal and state agencies. Fifteen of APPL's members, or 20%, have agreements solely with organizations other than NPS. (APPL 2004 Report to Membership)

More cooperating associations are reporting active participation in helping to manage volunteer programs, such as NPS Volunteers in Parks programs. (NPS 2003 Cooperating Association Annual Report)

More NPS cooperating associations are reporting increases in the amount of donations to parks being spent on technology, such as digitizing photographic archives, using MP3 technology to improve audio tours, and replacing worn out park films with DVDs. (NPS 2003 Cooperating Association Annual Report)

Within NPS, four cooperating associations serve about 58% of all 385 national parks, or 70% of all parks served by cooperating associations. (update from GAO review of NPS nonprofit partners)

BLM's first site-specific cooperating association became independent in 1988. BLM currently works with cooperating associations in all 11 western sites. (BLM Cooperating Association Handbook)

USDAFS works with 60 different interpretive associations, 27 of which are APPL members. (USDAFS)

USACE works with 24 different cooperating associations serving 31 sites. (USACE)

Agency staff vary in their impressions of the importance placed upon cooperating associations within the agencies, with staff from the same agency sometimes having an opposite perspective. Some say cooperating associations are encouraged as a great benefit to the public and the agency; some note the continued interest in broadening the range of services and support the associations offer; others state that there is little initiative within the agencies to build cooperating/interpretive associations. The need for clear authority through legislation for working with interpretive associations was noted by the Forest Service. (APPL 2004 agency survey)

In the wake of reduced agency budgets, agency staff and association partners noted that cooperating associations are being asked to do more to support federal lands. The significant trend is how these partners have gone from providing enhancements to providing essential funding. This includes "filling in" the growing gaps in staffing. But as cooperating associations pay to cover sales personnel, financial aid to agencies is reduced. (APPL 2004 agency and member surveys)

Reductions in budgets are reaching the ground, causing agencies to reduce hours or close visitor centers, which results in a reduction in sales for associations. Neglected building maintenance forces closures of buildings occupied by cooperating associations, thus threatening the financial health of these associations. Lack of facilities (housing, office space, retail space) in or near the park inhibits association growth. (APPL 2004 agency and member surveys)

Budget crisis has resulted in much experimentation and innovation in finding partners and funds, and using funds in new ways. This has created stress in long-established relationships based on stable understanding of roles and missions. Associations are being pushed into areas in which some feel uncomfortable. (APPL 2004 agency survey)

Hurricanes, floods, forest fires and other natural disasters have caused cooperating associations to suffer losses from closures, evacuation of sales areas, and consequently loss of sales and disruption to operations. (APPL 2004 agency and member surveys)

Cooperating associations need to continually adjust their merchandising to reflect visitor, technological, and retailing trends. With more repeat visitors, the content of a visitor center bookstore must change more frequently than in the past. Web ordering, PDA's, DVD's and a whole range of new media are available. Bookstore designs and space are also challenged in this era of changing product lines. (APPL 2004 agency and member surveys)

Concession stores are becoming more like cooperating associations sales outlets and visa versa. (APPL 2004 agency survey)

As 501(c)3's, cooperating associations are considered fundraisers. With much more of a focus on dollar return, these associations' mission of interpretation and visitor service is often lost, and we've failed to collectively document the value of that. (2004 APPL member survey)

With increased need for aid because of decreasing budgets, there is more of a willingness to try new kinds of partnership activities. (APPL 2004 member survey)

The up and down economy is affecting association sales revenue significantly. People are traveling but holding tighter to their wallets for things that are not essential like books, gifts and fee-based programs. (APPL 2004 member survey)

APPL has the following number of "prospective member" cooperating/interpretative associations in its database by agency affiliation: 32 USFWS, 22 USACE, 18 USDAFS, 11 state, 5 NPS, and 5 BLM.

Related nonprofit organizations

What do we know about trends, possible changes in trends, and possible futures for:

- Friends groups
- Other possible "partners" of any type with land-managing agencies
- Associations of related organizations

Growth in friends groups supporting public lands -- in little more than a decade, the total number of friends groups supporting National Wildlife Refuges nationwide has exceeded 240 groups with over 30,000 members. (REFUGEnet)

There will be growth in the establishment of friends groups and foundations that assist the public lands agencies in accomplishing many kinds of work they are not funded to do. These groups will be interested in interpretation and conservation education, but may not want to be looked at as authorized interpretive associations that handle bookstores and retail sales. Roles and responsibilities of associations and friends groups may continue to blur, sometimes causing competition between groups. The Forest Service in particular noted the need to develop greater authorities for friends organizations, others noted a need for increased guidance, clarification of roles, and training. (APPL 2004 member survey)

An estimated 149 friends groups, typically associated with a single park, serve the NPS. A cooperating association or a friends group supports park programs and operations in 347 (90%) of the nation's 385 national parks. Of the 347 parks, 136 have both types of nonprofit organizations, 187 have only a cooperating association, and 24 have only a friends group. (U.S. General Accounting Office)

National Wildlife Refuge Association (NWRA) launched a Friends Affiliate Program in 2003 that has grown to 27 member groups.

State parks are also growing in number of friends groups. For example, Tennessee lists 22 active state park friends groups, Wisconsin State Parks list 75 friends groups, Oregon lists 13 state park friends groups, Texas Parks & Wildlife lists 60 friends groups and support organizations. (state park Web sites)

California League of Park Associations (CALPA) lists 55 nonprofit volunteer groups as members serving the California State Park System. (CALPA Web site)

Agencies will continue to look to partner organizations to fund more basic service, not just "extras," and for these groups to be the agencies' advocates in Congress. (APPL 2004 agency survey)

Friends groups are being asked to develop/sell retail products that sometimes overlap into the cooperating association's mandate. (APPL 2004 member survey)

Agencies are encouraging the formation of locally-based not-for-profit groups that can perform a variety of functions, including volunteer recruitment/management, advocacy, retail sales, fundraising, and other supplemental operations. (APPL 2004 member survey)

Uncertainty over future role of congressionally-chartered foundations. (APPL 2004 member survey)

Alliances will form around National Heritage Areas. (APPL 2004 agency survey)

Agency staff comment that partnerships are all over the map. While many are viewed as outstanding partners, concern was expressed that some are too site specific and not connected to the agency as a whole; that there is not a proper balance in level of influence or control between the agency and partner; that park managers are sometimes in a difficult position managing conflicting interests between various partners/donors and agency priorities; and that some associations are moving in new directions that are increasingly diverging from the traditional relationships with agency partners. (APPL 2004 agency survey)

Concessions and other for-profits

What do we know about trends, possible changes in trends, and possible futures for:

- Concessions on public lands
- Other for-profit business relationships to public lands

Within NPS, concessionaires are now encouraged to carry thematic merchandise that interprets, and fosters awareness and understanding of, the park and its resources – as are cooperating associations. Performance of interpretive service, however, was noted as being outside the scope of the commercial services permitting process within the Forest Service. (NPS Management Policies 2001 and APPL 2004 agency survey)

The desire of the agency for more concession services that are interpretive and educational is causing a convergence of mission between some concessionaires and some cooperating associations, resulting in stress and conflict. (APPL 2004 agency and member surveys)

There will be a greater push for concessions and other for-profits due to fiscal constraints. Agencies are looking more and more to concessions and other for-profits to operate and maintain recreation areas. (APPL 2004 agency survey)

There will be continued interest in regarding concessions as a tool, balanced with the reality that many of the public land facilities and opportunities do not lend themselves to being commercially viable. (APPL 2004 agency survey)

Concessions have difficulty in attracting quality employees to remote areas. (APPL 2004 agency survey)

Concessions and other for profits have gone from family operators to larger corporations. (APPL 2004 agency survey)

Closer scrutiny of concessions by agencies results in greater likelihood of turnover. (APPL 2004 member survey)

Increased scrutiny of cooperating associations by concessionaires. (APPL 2004 member survey)

Concessionaires are becoming/can become partners in offering quality educational programs. (APPL 2004 member survey)

Fundraising in the US

What is happening in terms of trends, possible changes in trends, and possible futures for fundraising in the US in terms of:

- Giving: amounts, who gives, how much is given on average, percentage of income, etc.
- Forms of giving
- Fundraising approaches and methodologies

Funders continue to favor giving to small grassroots nonprofits rather than to large, national organizations. (GrantStation)

Funders now work hand-in-hand with nonprofit organizations to realize common goals. They act as participants as well as funders. (GrantStation)

Accountability - funders are demanding more of grantees in the evaluation process – they need to know if the money invested did in fact solve the problem identified. (GrantStation)

Accountability of nonprofits related to fundraising is increasing in general, as is congressional oversight of fundraising. (APPL 2004 member survey)

Cash donations from corporations have leveled off. Product donations and in-kind contribution of services are becoming more prevalent among corporations and small businesses. (GrantStation)

Corporate attitude supports sustainable development, accommodating both business and the environment. (GrantStation)

European and Asian companies are establishing formal giving programs in the U.S. (GrantStation)

Individual donors will increasingly feel a need to belong, not only through contributions but also by offering advice and ideas. (GrantStation)

Incorporating volunteers into major donor programs will continue to be a success factor in large gifts programs, in partnership with increasingly professional staff. (GrantStation)

According to a Congressional Budget Office (CBO) estimate, charitable bequests will fall 22 percent by 2010 due to the estate-tax repeal.

Federal grants processes are being “streamlined.” All organizations that apply for federal grants must have a DUNS number on their applications. (OMB Watch)

Generation X’ers combine volunteerism and charitable giving with adventure and often rigorous activity, such as AIDS/HIV rides and Walk for the Cure. They have a strong demand to get something out of the philanthropic experience, such as the immediate gratification of mentoring, the thrill of trekking through Africa, or a full accounting of the outcomes of their efforts. (United Way)

The status of the economy has affected fund raising. Too many very worthy causes are looking for dollars. (APPL 2004 agency survey)

It is harder and harder to convince donors to give money to projects associated with the federal government. There is broad feeling that the government should be supporting these projects as part of their primary responsibility. (APPL 2004 member survey)

Public lands agencies recognize the need for fundraising, but do not necessarily have the authority to do it or the skills to know how to manage it. (APPL 2004 agency survey)

Fundraising trends seem to be moving away from capital campaigns and focusing more on other forms of major gifts. (APPL 2004 agency survey)

The idea that it takes money to make money has for some changed the way organizations do fundraising. More sophisticated approaches to fundraising are being used by larger organizations to reach donors; smaller local efforts are finding it harder to succeed. (APPL 2004 agency and member surveys)

In a 2003 survey of charities that seek online donations, only one-fifth reported receiving more than 5% of their gifts via the Internet. An even smaller proportion said they thought the Internet was effective in helping them to raise money, attract volunteers, sign up members, or advocate for causes. (The Bridgespan Group)

Many Internet users say they go online to get information about the causes and nonprofit organizations they want to support, and often they take action as a result. Many of these supporters appear to be new donors and volunteers. Nearly 60% of Internet users surveyed said they had used the Internet to engage in the work of nonprofit organizations – including advocating for a cause, conducting research on policy issues, finding a volunteer opportunity, donating, and subscribing to newsletters. Most of those visitors went on to get more involved – for example, 40% made a donation offline, 35% signed an online petition, 35% referred a friend, 20% donated money online, and 15% signed up to volunteer. More than a fifth of respondents who took action after visiting a nonprofit group’s Web site said they would not otherwise have taken that action. (The Bridgespan Group)

Those ages 18 to 25 are more likely than any others to make donations online. Mainstream nonprofit groups such as Easter Seals have revamped their Web presence to build relationships with young people. (The Bridgespan Group)

Internet users ranked availability of information on how donations are spent as the second most important feature of a good nonprofit Web site. Nonprofit groups ranked this feature only seventh out of eleven. (The Bridgespan Group)

Conservation fundraising is at about 3%, and increasing, in the overall context of philanthropy. (APPL 2004 member survey)

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Driving Forces

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